✅ ChecklistGuro

CRM Data Entry & Accuracy Checklist

Contact Information

Ensuring accurate and complete contact details for all leads, clients, and vendors.

First Name

Write something...

Last Name

Write something...

Email Address

Write something...

Phone Number

Write something...

Contact Type

- ☐ Lead
- ☐ Client
- ☐ Vendor
- ☐ Agent
- ☐ Investor

Number of Occupants (if applicable)

Enter a number...

Notes / Additional Information

Write something...

Property Details

Verification of property information, including address, features, and listing status.

Property Address

Write something...

Bedrooms

Enter a number...

Bathrooms

Enter a number...

Square Footage

Enter a number...

Property Type

☐ Single Family

☐ Condo

☐ Townhouse

☐ Multi-Family

☐ Land

Property Features

☐ Garage

☐ Pool

☐ Fireplace

☐ Central AC

☐ View

Listing Date

Enter date...

Listing Status

- [ ] Active
- [ ] Pending
- [ ] Sold
- [ ] Withdrawn

Property Description

Write something...

Property Photos

⬆ Upload File

Interaction History

Detailed record of all communications and interactions with contacts.

Interaction Date

Enter date...

Interaction Time

Interaction Type

- ☐ Phone Call
- ☐ Email
- ☐ Text Message
- ☐ Meeting
- ☐ Showing
- ☐ Open House
- ☐ Other

Interaction Notes/Summary

Write something...

Topics Discussed (Select all that apply)

- ☐ Pricing
- ☐ Financing
- ☐ Property Features
- ☐ Market Conditions
- ☐ Legal Considerations
- ☐ Showing Feedback
- ☐ Other

Duration (in minutes)

Enter a number...

Supporting Documents (e.g., email attachments)

⬆ Upload File

Lead Source & Status

Tracking the origin of leads and their progression through the sales pipeline.

Lead Source Category

☐ Online Advertising

☐ Referral

☐ Open House

☐ Social Media

☐ Networking Event

☐ Cold Call/Email

☐ Website Form Submission

☐ Other

Specific Lead Source (e.g., Google Ads Campaign Name)

Write something...

Initial Lead Status

☐ New

☐ Qualified

☐ Nurturing

☐ Unqualified

☐ Lost

Lead Score (if applicable)

Enter a number...

Date Lead Received

Enter date...

Lead Follow-up Priorities

☐ High

☐ Medium

☐ Low

Notes on Lead Interaction (Initial)

Write something...

Financial Information

Accurate recording of financial details related to transactions.

List Price

Enter a number...

Purchase Price

Enter a number...

Earnest Money Deposit

Enter a number...

Closing Costs (Estimated)

Enter a number...

Down Payment Amount

Enter a number...

Date of Contract Signing

Enter date...

Estimated Closing Date

Enter date...

Financing Details (Loan Type, Lender)

Write something...

Document Management

Ensuring documents are properly associated with the correct contacts/properties.

Property Disclosure Documents

⬆ Upload File

Executed Contracts

[⬆ Upload File]

Title Reports/Commitments

[⬆ Upload File]

Document Type

- ☐ Contract
- ☐ Disclosure
- ☐ Title Report
- ☐ Inspection Report
- ☐ Other

Document Notes/Summary

Write something...

Document Received Date

Enter date...

Document Status

- ☐ Pending
- ☐ Reviewed
- ☐ Signed
- ☐ Archived

Data Formatting & Consistency

Standardizing data entry formats to maintain data integrity.

Property Type

- ☐ Single Family
- ☐ Condo
- ☐ Townhouse
- ☐ Multi-Family
- ☐ Land
- ☐ Commercial

Bedrooms

Enter a number...

Bathrooms

Enter a number...

Square Footage

Enter a number...

Listing Status

- ☐ Active
- ☐ Pending
- ☐ Sold
- ☐ Withdrawn
- ☐ Expired

Listing Date

Enter date...

Lead Source

- [ ] Website
- [ ] Referral
- [ ] Open House
- [ ] Networking
- [ ] Social Media

Compliance & Regulations

Adherence to legal and ethical requirements regarding data handling.

Confirmation of GDPR Compliance Review?

- [ ] Reviewed and Compliant
- [ ] Under Review
- [ ] Not Reviewed

State-Specific Data Disclosure Forms?

- [ ] All Required Forms Attached
- [ ] Partial Forms Attached
- [ ] No Forms Attached

Last Privacy Policy Update Date

Enter date...

Notes Regarding Compliance Concerns/Changes

Write something...

Is Data Encryption Used?

☐ Yes

☐ No

☐ Partial Encryption

Supporting Documentation (Privacy Policy, Consent Forms)

⬆ Upload File