The Pipedrive data health checklist

19 checks with Pipedrive's own tools. Export your data before you fix anything. Tested in a Pipedrive sandbox, October and November 2026.

Pipehand

Step 0. Admins: look for Company settings > Usage > **Data cleanup**. The help center says it groups items to review; regular users don't see it.

☐	Check	Where to look	Native fix	Watch out
☐	1. Duplicate people and orgs	Tools and apps > Merge duplicates (click Preview to refresh)	Fix phone formats, then merge	Needs the same name and exact values. Found 1 pair where our matching found 8 (plus 4 duplicate deals). Merges can't be undone
☐	2. Phones in mixed formats	Phone column in the People list	Edit by hand, or bulk edit / import after a one-record test	The US format setting only changes the display. Bulk edit and an import matched by ID replaced the whole phone list
☐	3. Records untouched for a year	Data cleanup groups (admins)	Export, then archive or delete	Leads and deals count toward a per-seat limit. API deletes left notes and activities behind
☐	4. Duplicate deals	Sort Deals by title or organization	Deal > More > Merge	Nothing detects them. The losing deal's value is lost; its owner isn't notified
☐	5. Open deals, no next activity	Filter: Status is open + Next activity date is empty	Schedule activities (bulk, Growth and above)	
☐	6. Rotting deals	Pipeline > edit > Rotting in (days) per stage	New activity or update	Ignores future activities. Resets on any activity, edit, note, file or email
☐	7. Deals stuck in a stage	Insights > Report > Deal > Duration; filter Date of entering stage is before	Move on or mark lost	Rotting measures inactivity, not time in stage
☐	8. Close date in the past	Filter: Status is open + Expected close date is before today	Update the date or close	Won and lost deals count toward the limit until archived
☐	9. Missing key fields	Personal preferences > Data fields	Important fields (Growth+), required fields (Premium+)	Help articles disagree on plans
☐	10. Lost deals, no usable reason	Filter: Status is lost + Lost reason column	Company settings > Lost reasons (deals admin)	Free text by default
☐	11. Duplicate leads	By hand in the Leads Inbox	Lead > Merge	The merged lead is deleted on the spot, not in Restore data
☐	12. Old leads	Leads Inbox filters and columns	Convert or archive	Count toward the deals and leads limit
☐	13. Overdue activities	Activities list > Select period + Everyone	Done, reschedule or delete	Marking done resets the deal's rotting timer
☐	14. Owners who left	Any list > Filter > Owners	Bulk edit Owner; repeat for people and orgs	A deactivated user's seat is still billed until removed
☐	15. Who can see and restore	Settings > Manage users > Visibility groups	Review user permissions too	A regular user restored people an admin deleted
☐	16. Apps with write access	Tools and apps > Marketplace apps	Uninstall what nobody uses	All apps share one API budget. Their one-by-one edits aren't in Restore data
☐	17. Unused custom fields	Edit field > View field stats	Delete after an export	Deleting a field deletes its data. Lite allows 30
☐	18. Daily API budget	Company settings (API usage), emails at 75% and 100%	30,000 x plan multiplier x seats	Reset measured at 07:00 UTC in October (midnight US Pacific), not midnight UTC. A merge costs 40 tokens
☐	19. Recent export	Tools and apps > Export data > Generated exports	Export every data type	Kept 28 days. Restore data doesn't cover merges or one-by-one edits

Last checked November 2, 2026. Full guide with sources: pipehand.com/guides/pipedrive-data-health-checklist

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