

# Touchpoint Removal and Touchpoint Suppression

Learn how to remove or suppress Touchpoints that meet specific criteria from your CRM. This can be helpful for freeing up data space if you are having Salesforce data storage limits.

There is one key difference between Touchpoint Removal rules and Touchpoint Suppression rules:

- Touchpoint Removal - Bizible will purge (ie remove) any Touchpoints from your CRM that fit the rule criteria. The data **can** be reported on within the Bizible ROI Dashboard, but no longer in the CRM.
- Touchpoint Suppression - Similar to Touchpoint Removal, but the data **CANNOT** be reported on within the ROI Dashboard.

Before getting started with creating Touchpoint removal/suppression rules, it's a good idea to share your implementation plan with your marketing and sales operations team. You should already have an idea as to which types or values you want removed. Some of the common use cases are:

- Delete Touchpoints from closed lost opportunities
- Delete Touchpoints from very old leads
- Delete Touchpoints from unqualified leads

Once the rules are saved, Bizible will clean up and redistribute your attribution model. This means the milestones and positions will change, and your channel's attribution credit will change! This will modify your data, so contact your Success Manager if you need assistance.

1) There are two sections for removal/suppression settings. You have the option of setting it up for Bizible Touchpoints (Leads and Contacts) or Bizible Attribution Touchpoints (Contacts, Opportunities, and Accounts).

Start with adding a rule and selecting the Field that will define your criteria.

Choose from a list of Operators that will relate to the next set of values, which you'll add in the next column.

Remove Bizible Attribution Touchpoints from CRM ?

Field	Operator	Value	
Opportunity.StageName	matches any	Cancelled, Closed Lost	✓ + 🗑️

## Tip

To add multiple values in a field, use the "matches any" operator with commas separating each value.

2) Add rules within the same group to utilize "AND" logic in your statement.

Or, add new statements outside of the group to utilize "OR" logic in your statement.

Remove Bizible Attribution Touchpoints from CRM ?

Field	Operator	Value		
Opportunity.StageName	matches any	Cancelled, Closed Lost	and	
Opportunity.CloseDate	is less or equal than	12/31/2016	+	
or				
Opportunity.RecordType.Name	is equal to	Renewal	+	
+				

3) If your rules get complex and you need to recreate groups and make small changes to each statement, use the Clone option to make things simpler.

Field	Operator	Value		
Opportunity.StageName	matches any	Cancelled, Closed Lost	and	
Opportunity.CloseDate	is less or equal than	12/31/2016	+	

If you make a mistake, don't worry. You can delete individual rows of your statement or full groups, too.

Field	Operator	Value		
Opportunity.StageName	matches any	Cancelled, Closed Lost	and	
Opportunity.CloseDate	is less or equal than	12/31/2016	+	

4) Set up rules for the Bizible Attribution Touchpoints if you want them applied to both objects. Our flexibility allows you to set rules for one object or both objects and may choose to set them up for both if they apply.

Remove Bizible Touchpoints from CRM ?

Field Operator Value

-- Select Field -- -- Select Operator -- Enter Value ✓ + ✕

+

Suppress Bizible Touchpoints from CRM ?

Field Operator Value

-- Select Field -- -- Select Operator -- Enter Value ✓ + ✕

+

Remove Bizible Attribution Touchpoints from CRM ?

Field Operator Value

-- Select Field -- -- Select Operator -- Enter Value ✓ + ✕

+

Suppress Bizible Attribution Touchpoints from CRM ?

Field Operator Value

-- Select Field -- -- Select Operator -- Enter Value ✓ + ✕

+

To finish, Save and Process your rules. If you're making a lot of changes, be sure to Save your changes along the way. Bizible won't actually start removing your Touchpoints until you click the Save and Process button.

Operator	Use Case
Is Equal To	Single value - exact match
Contains	Single value - contains value
Matches Any	Multiple values - Exact Match
Matches Any (Contains)	Multiple values - *value*, *value*, *value*

## Related Articles

[Bizible University: Touchpoint Suppression](#)

