

The Edge – Managing Duplicate Customers

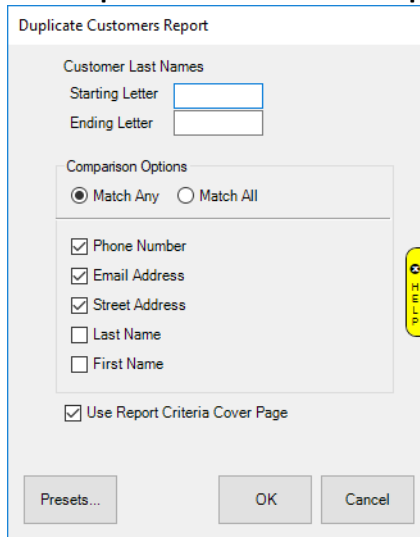
Overview

This document will walk you through the best practices for managing duplicate customers. This includes developing a strategy to identify and merge duplicate records for your store. Because merging customer records cannot be undone, it is important you have a good understanding of the process and implications before beginning.

Running the Report

The **Duplicate Customers** report will generate a report of potential duplicates. To run this report:

1. Click **Reports ► Customers ► Duplicate Customers**.



2. Use the **Starting** and **Ending Letter** fields to limit the report to a range of customers based on last name. Leaving these blank will check the entire customer base for duplicates. Depending on the number of customers, this could take a very long time and the resulting report might be very long. If that is the case make a plan to work through the process a few letters, or even one letter, at a time.
3. The **Comparison Options** radio button works in conjunction with the checkboxes below it to control how the report searches for potential duplicates:

Match Any Display customer records as potential duplicates if ANY of the criteria checked matches.

Match All Display customer records as potential duplicates if ALL of the criteria checked matches.

4. Select your criteria and click **OK** to generate the report.

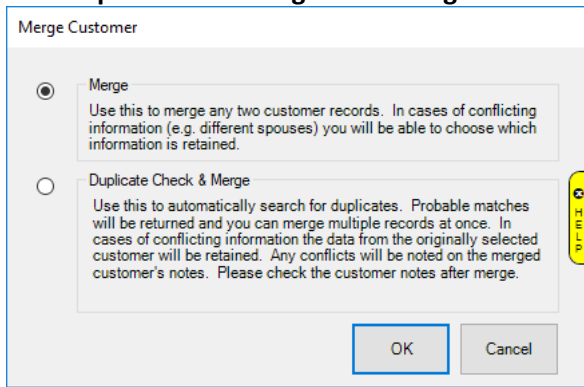
Customer / ID	Name	Address	Phone	Email
Smith, John (001-12692)		1 Main St Naugatuck CT 06770	203-123-4567	
001-12697	Smith, John	1 main st Naugatuck CT 06770	203-123-4567	
001-12707	Smith, John	1 Main St Naugatuck CT 06770		
Smith, John (001-12697)		1 main st Naugatuck CT 06770	203-123-4567	
001-12692	Smith, John	1 Main St Naugatuck CT 06770	203-123-4567	
001-12707	Smith, John	1 Main St Naugatuck CT 06770		
Smith, John (001-12707)		1 Main St Naugatuck CT 06770		
001-12692	Smith, John	1 Main St Naugatuck CT 06770	203-123-4567	
001-12697	Smith, John	1 main st Naugatuck CT 06770	203-123-4567	

Working with the Report

- Customers will be listed multiple times as they will appear as duplicates to each other. In the example screenshot on the previous page, there are three customer records for John Smith. Notice each one is showing the other two as potential duplicates.
- You can click on the customer name or number to open the customer's record. From here you can view details and, if necessary, use the **Supervisor** button to merge records.
- The report does NOT refresh, so if you are working through and merging customers the report will not reflect these changes until it is run again.

Merging Customers

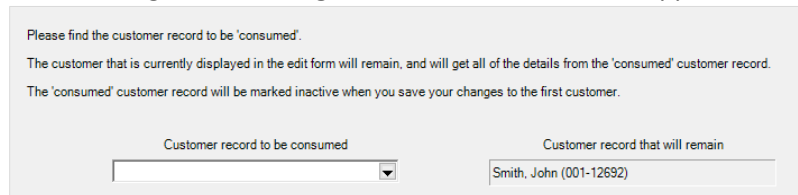
1. Edit the customer record you wish to keep either by clicking on it on the report or by using **Customer Find**.
2. Click **Supervisor** ► **Merge**. The **Merge Customer** window will appear with two choices:



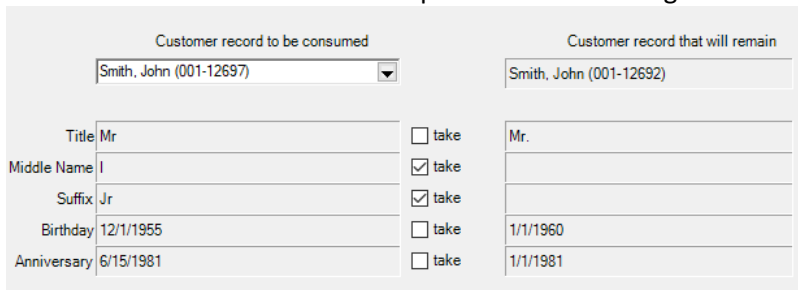
3. Choose your desired method of merging and click **OK**. See next sections for more information on each function.

Merge

1. After clicking **OK**, the **Merge a Customer** window will appear.



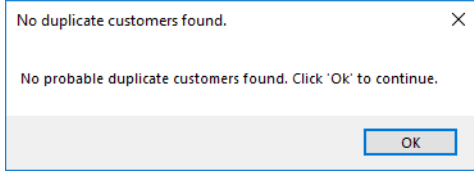
2. Use the drop-down on the left to find the customer you wish to consume. The consumed customer will be merged into the remaining customer on the right.
3. Any conflicting information will be displayed. Use the checkboxes to indicate what to **take** from the consumed record. This information will be copied to the remaining customer and overwrite what was there previously.



4. Click **OK**, then choose one of the **Save** options to complete the merge.

Duplicate Check & Merge

1. After clicking **OK**, either:
 - a. A message will appear indicating no probable duplicates were found. There is no further action to take.



- b. A list of probable duplicates will appear. Continue to step 2.
2. Use the checkboxes to select one or more customer records to merge into the currently open customer record.

Potential Customer Matches								
Match	Status	ID #	Last Name	First Name	Spouse/Partner Last	Spouse/Partner First	Email Type	Email Address
<input type="checkbox"/> Conflict	Active	001-12692	Smith	John	Smith	Sally		
<input type="checkbox"/> Conflict	Active	001-12707	Smith	John	Smith	Leslie		
<input type="checkbox"/> Probable	Active	001-12711	Smith	John			WORK	John@work.

VIEW

A conflict indicates the original customer does not have a spouse, but these probable duplicates do. See the Notes on Spouse/Partner below for additional information.

3. You will not be prompted to select data to **take** from consumed records. In the case of conflicts the data from the originally selected customer is retained. Check the customer’s notes after merge for details.
4. You CANNOT undo a merge, so please verify you have selected correct customers before proceeding.
5. Click **Merge Customers** to perform the merge. This merge happens IMMEDIATELY and CANNOT be undone.

Notes on Spouse/Partner:



If the originally selected customer does NOT have a spouse and you select multiple other records that do have spouses, a window will appear asking you to choose the spouse to retain.

If the originally selected customer DOES have a spouse that information will be retained and you will not be able to choose a different spouse. Any conflicting data will be ignored while any missing data (e.g. spouse birthday) will be brought over.



Note on Duplicate Checker:

Found under **Customer Options** in **System Options**, the **Customer Duplicate Check** option controls what criteria the software uses to search for duplicate customers.