

Customer - Cash Customer Merge
AV Ref # 577

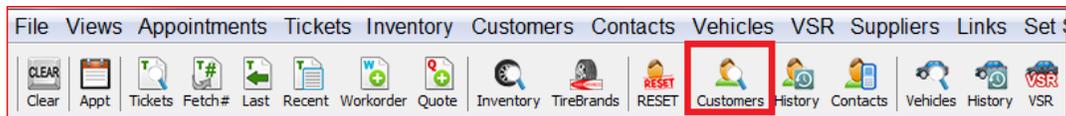
There is also a video showing how to perform this function:
Merge Cash Customers (2:17) – AV Ref# 394

About:

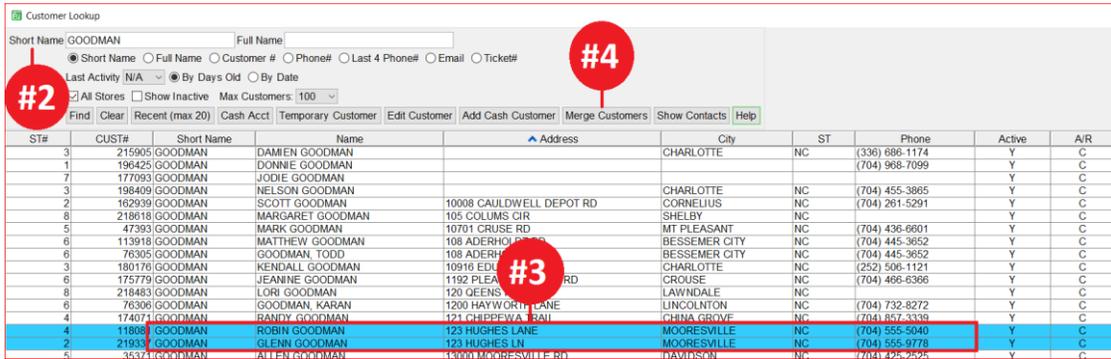
Duplicate customer accounts are unavoidable. However, BPOS has a merge feature that allows you to combine your multiple duplicate Cash accounts. You can select one target account and have all history for each of the duplicate accounts be transferred to this master account, along with all vehicle information and all contact information

How:

1. **Views** → **Sales Counter** → Click on the **Customer Lookup** button on your toolbar:



2. On the **Customer Lookup** screen (shown below), look up your customer.
3. When you see duplicate customers listed, you can either highlight the duplicates or hold down your **Ctrl key** and use your mouse to click on each account that is a duplicate:
4. Click on the **Merge Customers Option**:



Customer Lookup

Short Name: GOODMAN Full Name: _____

Short Name
 Full Name
 Customer #
 Phone#
 Last 4 Phone#
 Email
 Ticket#

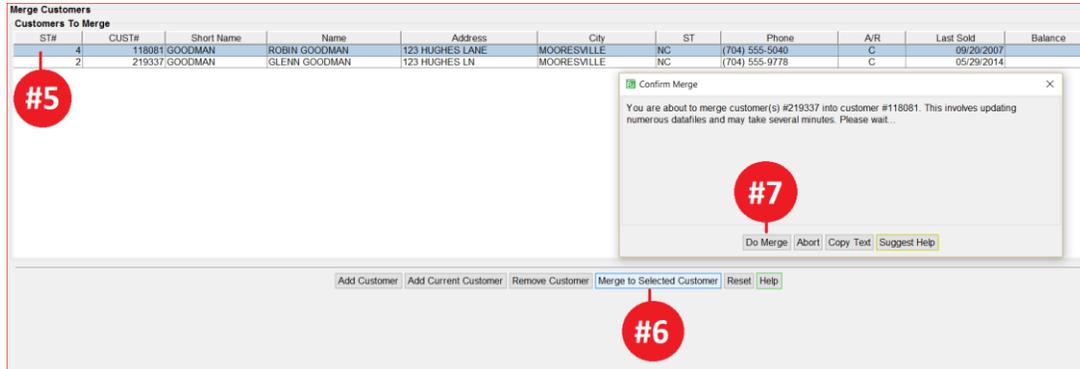
Last Activity: N/A By Days Old By Date

All Stores Show Inactive Max Customers: 100

Find Clear Recent (max 20) Cash Acct Temporary Customer Edit Customer Add Cash Customer Merge Customers Show Contacts Help

ST#	CUST#	Short Name	Name	Address	City	ST	Phone	Active	A/R
3	215905	GOODMAN	DAMIEN GOODMAN		CHARLOTTE	NC	(336) 886-1174	Y	C
1	196425	GOODMAN	DONNIE GOODMAN				(704) 968-7099	Y	C
7	177093	GOODMAN	JODIE GOODMAN					Y	C
3	198409	GOODMAN	NELSON GOODMAN		CHARLOTTE	NC	(704) 455-3865	Y	C
2	162939	GOODMAN	SCOTT GOODMAN	10008 CAULDWELL DEPOT RD	CORNELIUS	NC	(704) 261-5291	Y	C
6	219816	GOODMAN	MARGARET GOODMAN	105 COLUMS CIR	SHELBY	NC		Y	C
5	47393	GOODMAN	MARK GOODMAN	10701 CRUISE RD	MT PLEASANT	NC	(704) 436-6901	Y	C
6	113918	GOODMAN	MATTHEW GOODMAN	108 ADERHOPE RD	BESSEMER CITY	NC	(704) 445-3652	Y	C
6	76305	GOODMAN	GOODMAN, TODD	108 ADERHOPE RD	BESSEMER CITY	NC	(704) 445-3652	Y	C
3	180176	GOODMAN	KENDALL GOODMAN	10916 EDU	CHARLOTTE	NC	(252) 506-1121	Y	C
6	175779	GOODMAN	JEANIE GOODMAN	1192 PLEA	CRUISE	NC	(704) 466-6366	Y	C
8	218463	GOODMAN	LORI GOODMAN	120 QUEENS	LAWDALE	NC		Y	C
6	76306	GOODMAN	GOODMAN, KARAN	1200 HAYWORTH LANE	LINCOLNTON	NC	(704) 732-8272	Y	C
4	174071	GOODMAN	RANDY GOODMAN	121 CHEPPEWA	CHINA GROVE	NC	(704) 857-3339	Y	C
4	11808	GOODMAN	ROBIN GOODMAN	123 HUGHES LANE	MOORESVILLE	NC	(704) 555-5040	Y	C
2	21933	GOODMAN	GLEN GOODMAN	123 HUGHES LN	MOORESVILLE	NC	(704) 555-9178	Y	C
5	36371	GOODMAN	ALLEN GOODMAN	13000 MOORESVILLE RD	DAVISON	NC	(704) 425-2525	Y	C

5. On the **Merge Customers** screen (shown below), click on the target account you wish to keep. All history for each of the duplicate accounts will be transferred to this account, along with vehicle information and contact information.
6. Click on **Merge To Selected Customer** button at the bottom:
7. You will receive a confirmation pop up message. If you are sure you wish to continue, click on the **Do Merge** button. Otherwise, click on **Abort**:



Merge Customers

Customers To Merge

ST#	CUST#	Short Name	Name	Address	City	ST	Phone	A/R	Last Sold	Balance
4	118081	GOODMAN	ROBIN GOODMAN	123 HUGHES LANE	MOORESVILLE	NC	(704) 555-5040	C	09/26/2007	
2	219337	GOODMAN	GLENY GOODMAN	123 HUGHES LN	MOORESVILLE	NC	(704) 555-9778	C	05/29/2014	

Confirm Merge

You are about to merge customer(s) #219337 into customer #118081. This involves updating numerous datafiles and may take several minutes. Please wait...

Do Merge Abort Copy Text Suggest Help

Add Customer Add Current Customer Remove Customer Merge to Selected Customer Reset Help

8. When the merge is complete, you will receive a “Merge Successful” message.

Option Settings:

**** Note** –You can only merge CASH accounts. Charge accounts cannot currently be merged. Contact Tech Support for best practices regarding Duplicate Charge Accounts.