

merging customers

Maintaining your database is integral to a successful business.

Merge Information

When merging customers certain fields will merge and some will be kept or will not merge within the file of the “right” or “kept” customer.

Items that will not merge include:

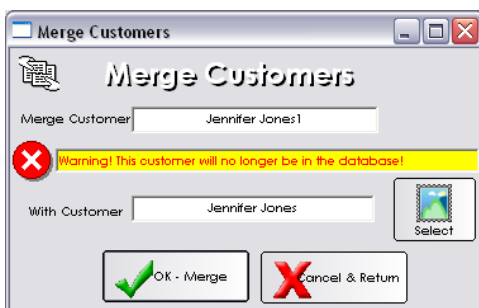
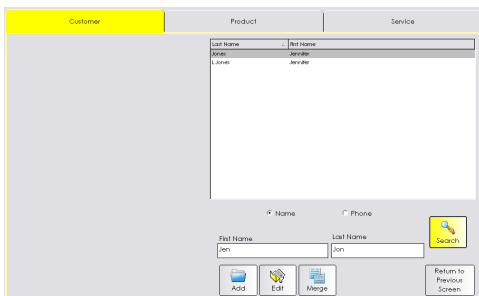
- The customer that is kept or the one chosen second is the one whose address, gender, phone number, birthday, primary staff and referral is kept none of these fields will merge with the “incorrect” customer.
- Allergies, Medications, Drivers License number, Appt Hold Information, Occupation, Employer, Anniversary Date, Social Security Number and Marital Status.

Items that will merge include:

- Open appointments, Standing appointments, Customer and ticket history and rewards
- Customer balance, Customer Note and Interests
- The Category and Staff Retention information as well as special timing and pricing.
- All formulas will merge

Merge Customers

1. From the SalonBiz®/SpaBiz® menu bar, click on the File Drawer icon.
2. Make sure that the Customer tab is highlighted.
3. Identify duplicate records.
4. Verify the customer file that contains the correct information.
5. Determine the customer file that has the incorrect information. (This one will be selected first in the next step, while you are in the customer information screen it helps to put a “1” at the end of the last name of the “wrong” customer. This way you will know to select it first.)
6. The customer file with the incorrect information will be selected first by clicking one time on the customer name.
7. Click on the Merge button.
8. When the Merge Customer box appears click on the Select button to search for the next customer. To search: type in the first few letters of the first and last name then hit the "ENTER" key on your keyboard.
9. Highlight the “correct” customer by clicking one time and then click the Select button.
10. Click on the OK - Merge button.
11. Answering ‘Yes’ to the question “Are you sure you wish to merge Client A with Client B?” will allow the customers to be merged together.
12. Answering ‘No’ to the question will not merge the customers together and you will have the option to select a different customer or Cancel and Return to the main information screen.



frequently asked questions

Can I merge a customer whose last name has changed?

Absolutely, make sure you select the “old” name first and then merge it into the “new” name. Don’t worry the color formula will be included in the merge.

Should I merge parents with their children?

No, keep the customer files separated to ensure that the appointments are booked correctly and merge the sales tickets when they are ready to check out.

Can I merge duplicate names with different addresses?

Yes, always verify the correct spelling of the name and the phone numbers then proceed merging the “wrong” address first with the “right” address second.

How do I avoid duplicating customers?

Make sure you are correctly spelling the customer’s name, verify their phone number and if you happen to have two different Jennifer Smith’s at your location use their middle initial and/or maiden name to differentiate between the customers.

Can you un-merge?

No, if you are not 100% sure of a duplicate record it is better that you keep them separate until you are certain.

Should I merge duplicate customers with different phone numbers?

Yes, keep in mind that if you have multiple phone numbers for a customer the merge will only keep the phone numbers for the customer that is “picked” last. You will want to update the correct information into that record.

