

Tech Tip Tuesday—June 12, 2018

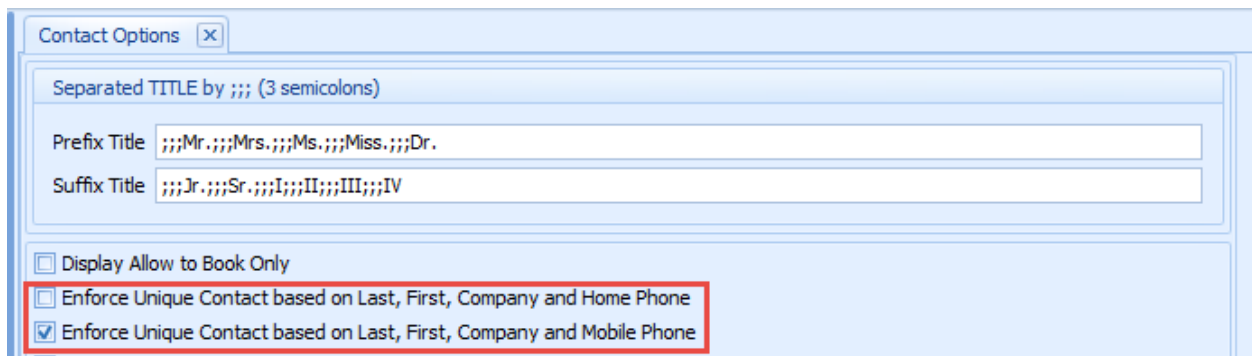
Preventing Duplicate Contacts

As we all know, the contact record is the key to starting a reservation, because it is the contact (person making the trip) who is responsible for the trip—giving you information about when, where, what, etc.

Therefore, it's generally a good idea to have a separate contact record for each booker, and also not to have more than one contact record for a booker.

Sometimes, though, when a reservation agent is in a hurry, he or she might create a new contact record for a contact for whom there is already an existing record. While Livery Coach has tools to merge contact records, it would be better to try to prevent this from happening in the first place.

In Setup...Maintain...System Default Configuration...Contact Options, there are some optional settings that can be checked to enforce unique contacts based on the First and Last name, the Company Name, and the phone (home and/or mobile).



If you have this checked, and an agent tries to create a new contact for someone who already exists in your system, upon attempting to save the new contact, a message is shown that the contact already exists, so it will not be added.

