Tech Tip Tuesday—February 1, 2022

Preventing Duplicate Contacts (Enhanced)

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.

Back in 2018, we had a Tech Tip that covered how to enforce unique contacts, but since then we have enhanced this feature, so it's a good time to visit it again.

If you navigate to Setup->Maintain->System Default Configuration->Contact Settings, 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).

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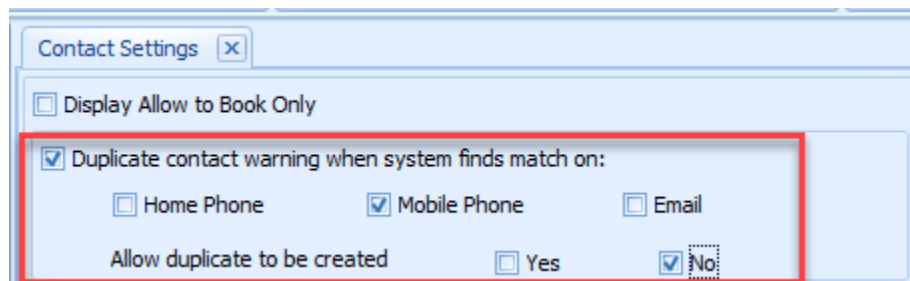
If you have this checked, and an agent tries to create a new contact for someone who already exists in your system, upon attempting to save the new contact, a message is shown that the contact already exists, so it will not be added.