Tech Tip Tuesday—January 9, 2024

Happy New Year—the CD/NLA Show in Las Vegas is coming up!

Livery Coach will be exhibiting, as usual at the CD/NLA show at the MGM in Las Vegas on March 3-March 6th. We will be in booth 59 this year, near the NLA Lounge (rather than in the front as at previous shows). We will also be having our annual user meeting at 4:30pm on Sunday, March 3 (exact location and agenda tba). We hope to see you there!

Merge Contact Records

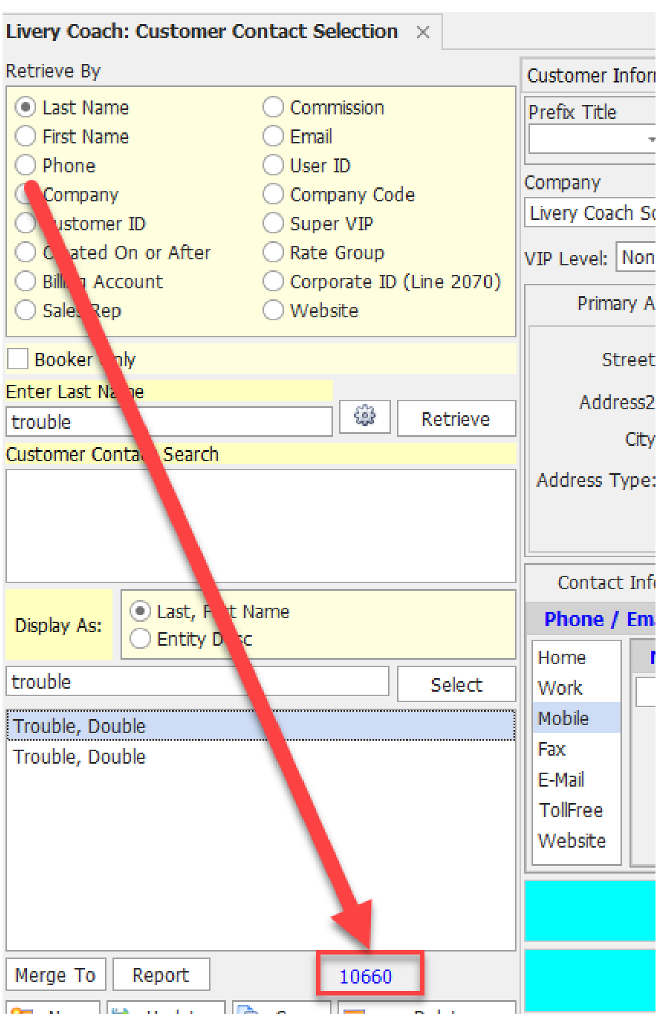
One thing people often like to do at the beginning of the year is clean up their Livery Coach contacts a bit, and an important part of that process is eliminating duplicate contact records.

If your agents are careful and always attempt to look up a customer before creating a new profile, then you shouldn't have a ton of these, but duplicates still happen. For example, a customer could create a new one on the web, rather than logging in to his or her existing profile.

While sometimes getting rid of a duplicate contact is as easy as just deleting it, if you have trips booked by your duplicate contact, then you can't just delete it.

Instead, you must perform a MERGE.

Merging a contact to another contact allows you to move all the trips and other information so that you can then delete the duplicate.

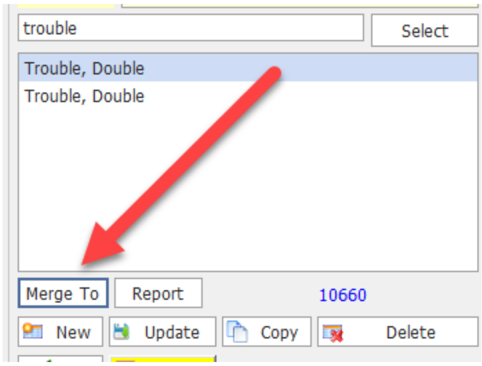


Before merging contacts, it's important to understand that every contact in your Livery Coach system has a unique record number (which we call "Customer ID"). That's how the system can keep contacts from getting confused even if you change the data in all the fields. Normally, you don't need to know or care about this, but when merging contacts, it's helpful to avoid getting your duplicates mixed up.

When you are looking up a contact, the unique Customer ID appears at the bottom of the look up results screen when you select a contact. In the screen shot below, the Customer ID 10660 as we can see in the screen shot to the left.

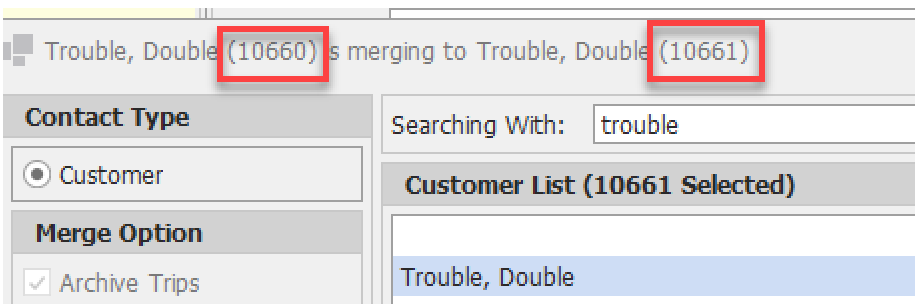
Now that we know what a Customer ID is, let's move on!

In order to merge 2 contacts, you first want to look up the contact you want to eventually eliminate.



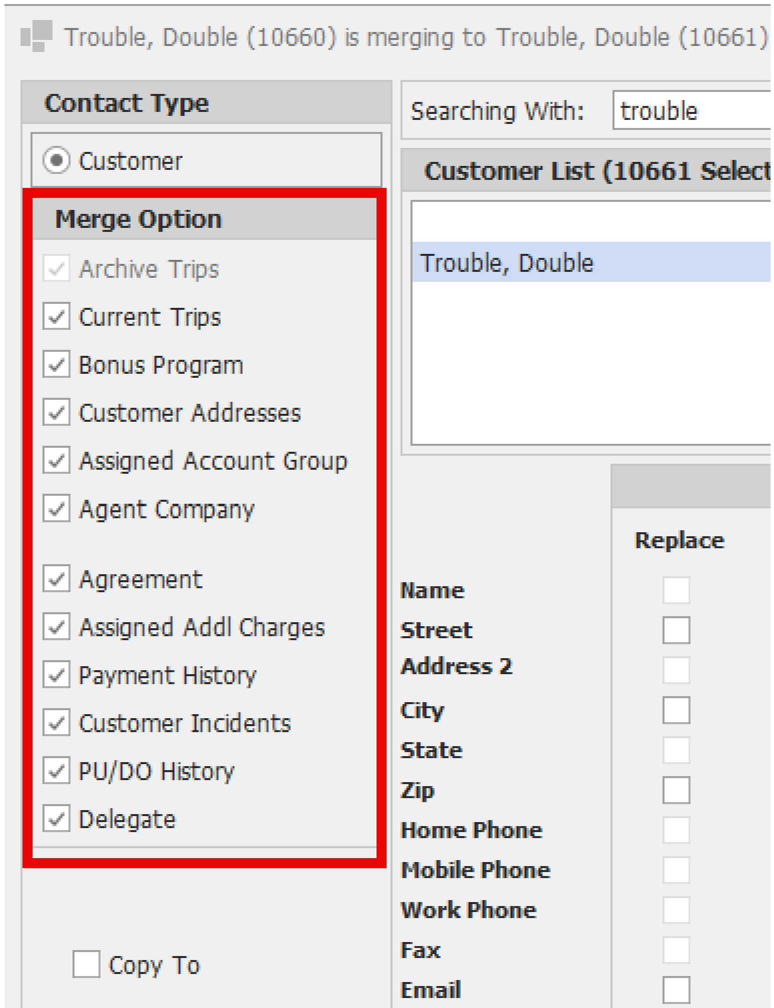
Once you select that no-longer-wanted contact, the next step is to click the Merge To button.

After clicking that button, a window pops up allowing you to search for the destination contact (using the last name)—the one you want to keep. The screen will show you the Customer IDs of both the source contact and the destination contact. In the screenshot below, we will copy the selected info from Customer ID 10660 to Customer ID is 10661 (both of whom are named Double Trouble).



Now that we have the contact we want to get rid of and the one we want to keep identified, the next step is to decide what information you are copying over.

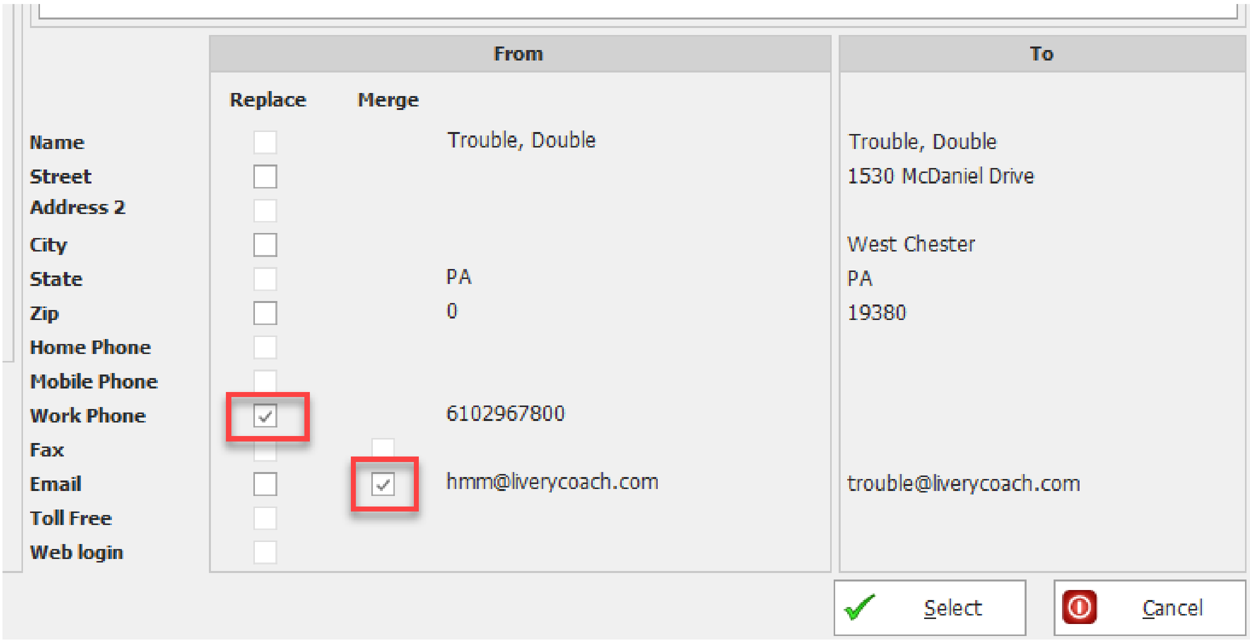
On the left side, there are all the categories of data that are tied to the contact, and they are all checked. Typically you would want to leave these all checked, but you can see the broad variety of information that needs to be moved/merged.



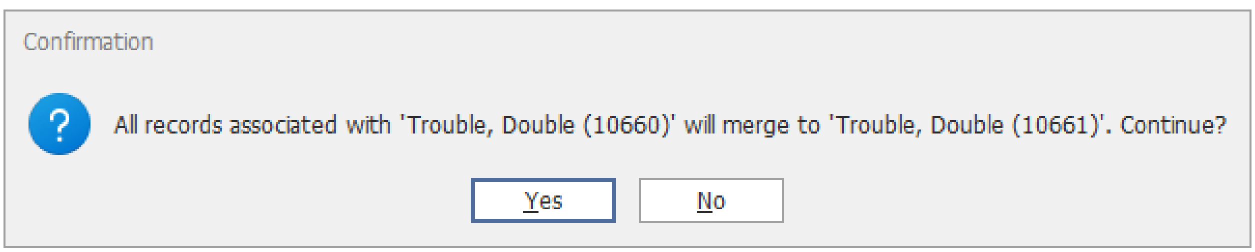
In addition, you might have different data in different fields in your two contact records, and the rest of the screen lets you decide what to copy and what to delete.

There are From and To columns so you can see what data each record has. If you want to replace the "To" side with the info in the "From" field, click on "Replace". If you want to keep data from both, click on Merge. If you don't click anything, then no data will copy for that field.

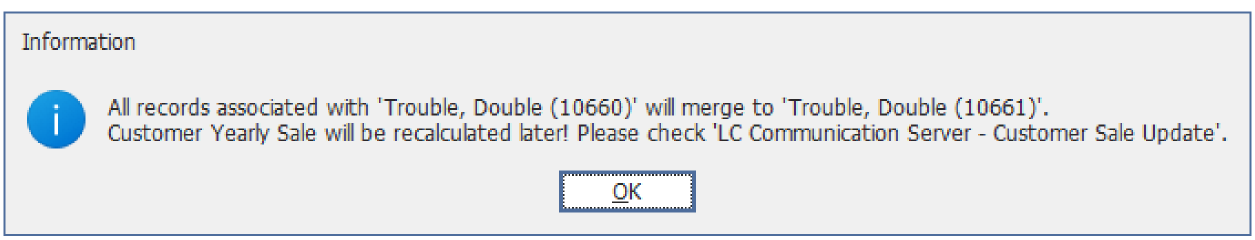
In the below screenshot, we will replace the (blank) Work Phone, and merge the two email addresses.



When you are ready, click on the Select button, and you will get a final confirmation box, just to make sure.



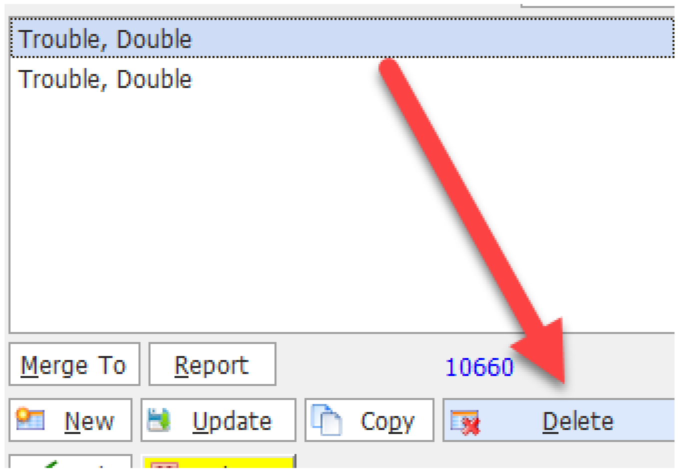
Assuming you click Yes, the following message pops up:



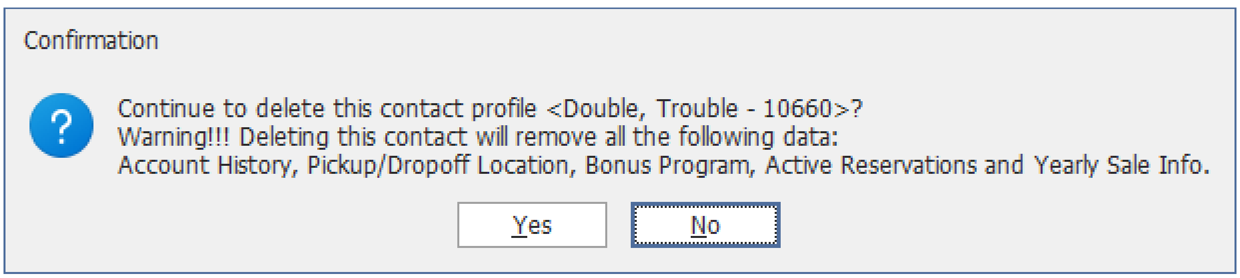
The message about Customer Yearly Sale is just telling you that the “Contact Sale-To-Date” box on your merged contact won’t be updated until the next day (there is a nightly process that does this).

Now that you have moved everything attached to your unwanted duplicate contact to the one you want to keep, the final step is to DELETE the unwanted contact.

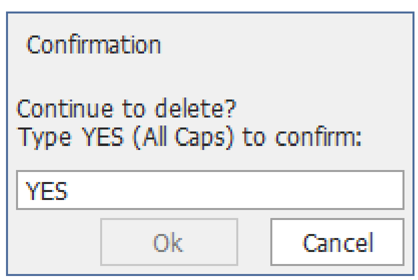
Simply select the contact you want to delete, and click DELETE.



You will get a warning, which you don't need to worry about since you just copied all this data to the contact you are keeping.



Then, just to make absolutely sure, we require you to type in the word YES in the box.



But once you do that and click OK, your contact is gone.