

WMS: Did You Know?

From Professor Merlot



One Customer is duplicated – how to merge the 2 histories?

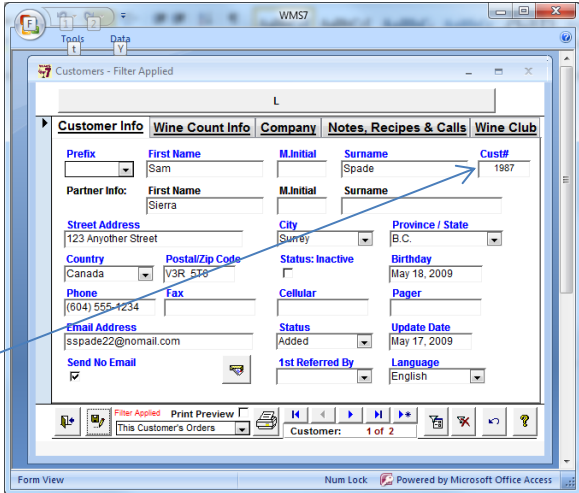
#35

Sometimes a customer is entered twice, likely with a different spelling, and there is a purchase history for the same customer in both names.

Here's how to merge the two names and histories into one:

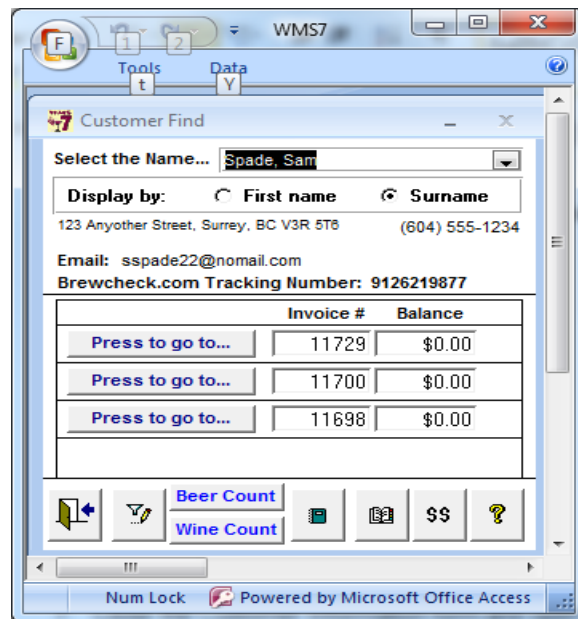
1. Find the 2 Names and related Customer IDs: we will use 'Sam Spade' and 'Sam Spaid' as the example.

2. Open the **Customer Information** form

- a) Using the **Filter button (blue Funnel)**, and filter on 'Sam' on First Name and 'Spa' in Surname.
- b) There are two shown on the form as 1 of 2 'Sam Spa*'.

- c) Make note of the associated 'Cust#' for each name.
- d) 'Spade # = 1987', 'Spaid # = 1401'.

3. Close the **Customer Information** form and open **Find Customer, F8**.

- a) Select the first **Sam Spade** and make note of the number of Invoices for this Sam, it is 3 as shown on the right.
- b) The number of Invoices for **Sam Spaid** is 1.
- c) Select the second **Sam Spaid** to merge because he has less current Invoices to change than the first **Sam Spade**.
- d) To merge the two names for the Sam, you need to change the 1 Invoice for **Sam Spaid, 1401, to the other name, Sam Spade, 1987**.



	Invoice #	Balance
Press to go to...	11729	\$0.00
Press to go to...	11700	\$0.00
Press to go to...	11698	\$0.00

- e) On this F8 form, **Select the Name = Sam Spaid** and all the Invoices will be displayed with their associated Balances showing, in this example, there is 1 invoice.
- f) Click on **Press to go to...** to jump to and open the invoice form.



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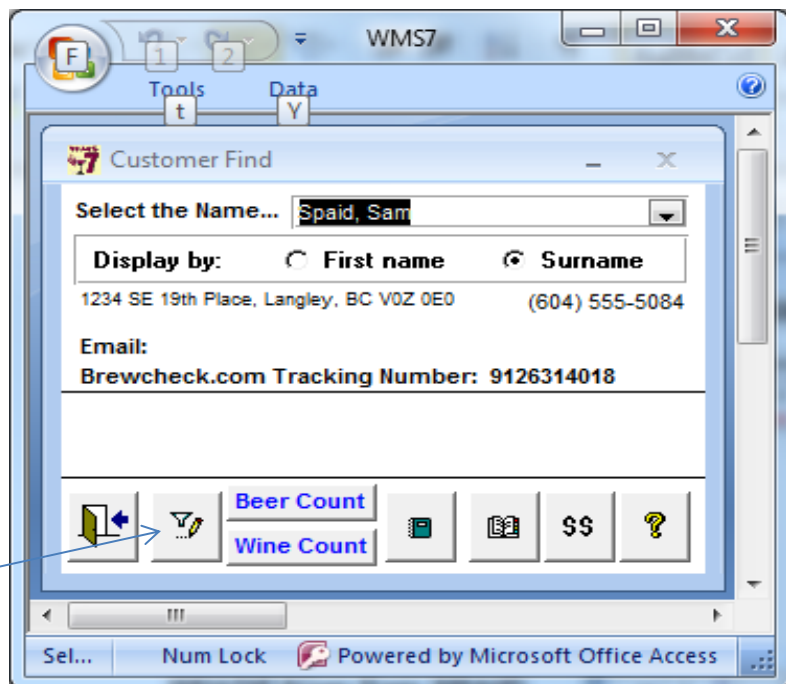
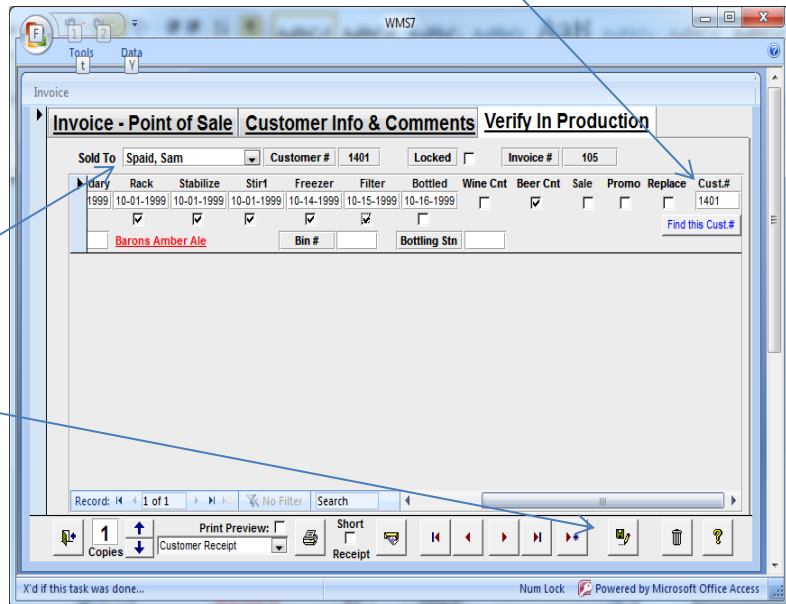
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- g) **Unlock** the Invoice
 - h) Open the **Verify in Production** Tab to view the items
 - i) Move the **Horizontal Scroll Bar** the bottom of the Production section, **all the way to the right until the 'Cust#' box is shown, in this case, the number is 1401.**
 - j) **Change this number to the Cust# 1987** of the name, Sam Spade.
 - k) Click to **Open** the **'Invoice – Point of Sale'** tab.
 - l) **Change** the **'Sold to Customer'** from **'Sam SPAID'** to **'Sam SPADE'**.
 - m) Press the **Save** button.
 - n) For each Invoice that needs to be merged from 'Sam SPAID' to 'Sam SPADE', repeat steps (f) to (m).
 - o) Once all of the Invoices have been changed for each production item and 'Sold To' name, close the Invoice.
4. If the **Customer Find** is still open, **Right-Mouse Click** on the **Door** button on **F8** once.
 5. Press the **F8** button to re-open the refreshed **F8** and Select **Sam Spaid**, there should be **no Invoices displayed**. If there is, repeat steps 3 (f) to (m).
 6. Press the **'Edit this Customer'** button to jump to **'Sam Spaid'** Customer Info form.



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7. The **Customer Information** form will be opened, please note only **1 of 1** should show at the bottom of the form.

8. The duplicate customer, **Sam Spaid** will now be deleted from WMS, here's how:

- Click once on the **Vertical bar** on the left of the form.
- The vertical bar will become **black**, this select this customer.
- Press the **Delete key on the keyboard once**.

- A warning prompt will appear.
- Press the **OK** button.

- A second warning prompt will appear asking you to confirm this deletion.
- Press the **OK** button.
- The **Customer Information** form will become empty; **Sam Spaid** has been removed from the WMS database.

- Press the **Door** button on the **Customer Info** form to return to F8.
- Data from Sam **Spaid** has been merged to Sam **Spade**.

