PALADIN DATA CORPORATIONTM

Biz Coach Webinars

FREE ADVANCED TRAINING



Double Trouble – Customer Merge Feature (COMING SOON!)

Stuart Shaw



TECHNICAL LEVEL:

EASY

NTERMEDIATE

ADVANCED



Today's Agenda



- What is the Customer Merge feature?
- ☐ What are the benefits of merging accounts?
- ☐ Customer Merge feature demo
- Q/A Session





What is the Customer Merge feature?







- Account name, phone#, rewards#, etc.
- Transaction history
- Account balance
- Pricing plans



Customer Merge

Duplicate account

- Account name, phone#, rewards#, etc.
- Transaction history
- Account balance
- Pricing plans

New

New account

- P account name, phone#, rewards#, etc.
- P + D transaction history
- P + D account balance
- P + D pricing plans



What are the benefits of merging accounts?



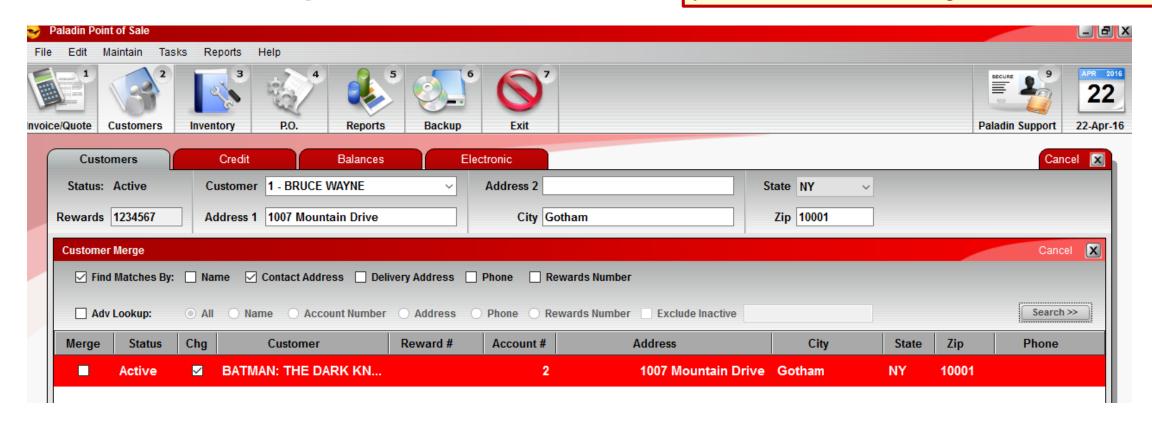
- ☐ Keep a customer's info in one place.
- Maintain one history for ALL customer transactions.
- ☐ Consolidate account balances and pricing plans.
- Make bookkeeping easier.
- ☐ Reduce checkout time.





Customer Merge feature demo

IMPORTANT! Backup your database before you use the Customer Merge feature.







Question/Answer session





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Learn more

Until this feature is released publicly, if you want to merge customer accounts, contact Paladin Support.

After this feature is released, you will find a step-by-step procedure for merging customer accounts in our Knowledge Base:

Search for How to merge customer accounts.

A recording of this webinar will be available at paladinpointofsale.com/webinars.

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