

PALADIN DATA CORPORATION™

BizCoach Webinars

FREE ADVANCED TRAINING



Double Trouble – Customer Merge Feature (COMING SOON!)

Stuart Shaw



TECHNICAL LEVEL:

EASY

INTERMEDIATE

ADVANCED



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Double Trouble – Customer Merge Feature (COMING SOON!)

Today's Agenda



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



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Double Trouble – Customer Merge Feature (COMING SOON!)

What is the Customer Merge feature?

P

+

D

Customer
Merge

New

Primary account

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

Duplicate account

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

New account

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



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Double Trouble – Customer Merge Feature (COMING SOON!)

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.



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Double Trouble – Customer Merge Feature (COMING SOON!)

Customer Merge feature demo

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

Paladin Point of Sale

File Edit Maintain Tasks Reports Help

1 Invoice/Quote 2 Customers 3 Inventory 4 P.O. 5 Reports 6 Backup 7 Exit

Paladin Support 22-Apr-16

Customers Credit Balances Electronic

Status: Active Customer: 1 - BRUCE WAYNE Address 2: State: NY

Rewards: 1234567 Address 1: 1007 Mountain Drive City: Gotham Zip: 10001

Customer Merge

☒ Find Matches By: ☐ Name ☒ Contact Address ☐ Delivery Address ☐ Phone ☐ Rewards Number

☐ Adv Lookup: ☐ All ☐ Name ☐ Account Number ☐ Address ☐ Phone ☐ Rewards Number ☐ Exclude Inactive Search >>

Merge	Status	Chg	Customer	Reward #	Account #	Address	City	State	Zip	Phone
<input type="checkbox"/>	Active	<input checked="" type="checkbox"/>	BATMAN: THE DARK KN...	2		1007 Mountain Drive	Gotham	NY	10001	



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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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