

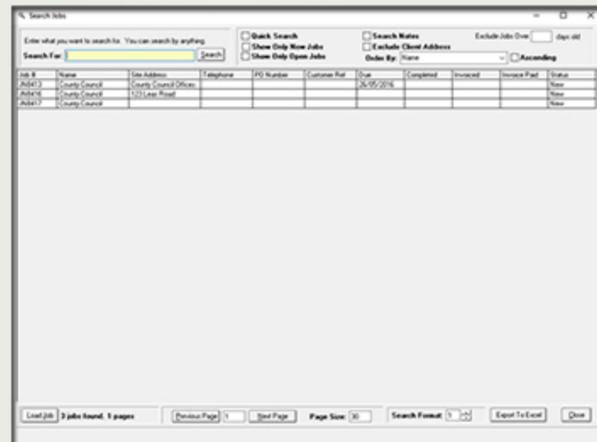


Technical Tuesday

REAL LIFE TECHNICAL SUPPORT QUESTIONS

Our Customer Said

“I have the same customers details recorded multiple times, how do I remove duplicates and merge the details ? ”



JOBTRACKER
PROFESSIONAL

Technical Tuesday

REAL LIFE TECHNICAL SUPPORT ANSWERS

We Said

“You can merge all the records into one and update all the relevant jobs with the correct details.

Click on Control Panel.

Click on the Maintenance Tab.

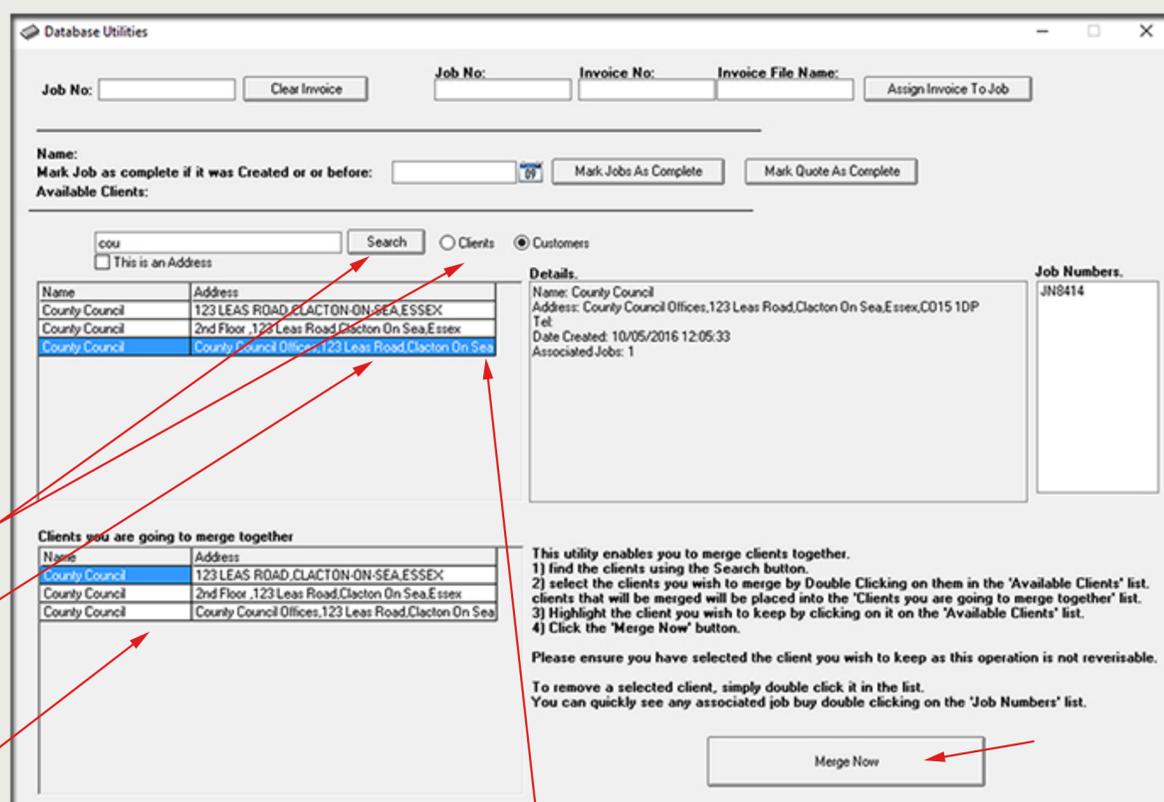
Click on Database Utilities.

Depending on which type of record you are trying to de-duplicate, select “Clients” or “Customers” then click here on the Search button.

Scroll down the list that display here.

Double click on any duplicate records.

The selected addresses for merging will be shown in the bottom list here.



When you're finished picking the duplicates click on the record with the best data in the top list.

I.e. this is the data you want to keep, the one with the best address.

Click the Merge Now button at the bottom right of your screen.

All relevant jobs will be updated and the details merged.

Repeat the process for other duplicates.”



sherwin
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