How to Run a Duplicate Customer Cleanup

Before you run a customer cleanup, you should back up your customer database by doing a customer export. (Customers / Export / Excel).

After doing a backup… Go to Customers / Cleanup. Choose **Cleanup Type** "Merge on Matching".

Merge on Matching:
You may choose to merge customers based on matching:

- Names (First and Last),
- E-Mail Addresses, or
- Both.

In the above example, we chose E-Mail. You can choose the option that is most appropriate for you, but if you are doing a general cleanup, we suggest that you first clean up all the Email matches (which in every case is certain to be the same person), then move to first and last names, which of course present a question as to whether they are the same person.

*Note that you will have an option to elect to PREVIEW your merge before executing it. Do not uncheck this box!

There are things to be aware of with each option. If you choose Names, beware that you might find multiple customers with the same names, but are actually different customers. If you choose emails, you are choosing a stricter matching option and likely will have to find the rest of your duplicates after cleaning those results, by selecting Names as a second round of cleanup. If you select both, that will produce the least number of duplicates and you might miss customers who have multiple accounts under different emails, so we don't recommend that option unless a situation specifically calls for it. Whatever you choose – keep the ramifications of that choice in mind.

The **Default Merge Into** option controls which record in a customer group the others are *merged into*.

You have the options of:

- Most Recently Updated – last time something was updated or changed in this record
- Most Recently Created – the newest of the customer records in the group
- Most Orders Placed, or
- Highest Customer Rank –whether they are a higher rank customer type, as set forth in customers/types

Many clients choose "Most Recently Updated", because that record would have the most recent fresh activity, which might include a new address, or a recent password or credit card in the account that the customer might expect to see again - but you can see there are other options.

The **Merge Addresses** option retains all unique addresses across a merged customer group. So, if you have one record for Sally Smith that contains a shipping and billing address, and Sally's mom's address, and Sally's sister's address, all the addresses will be kept and merged into the customer record you choose. If you do not select this option, only the addresses on the "merge into" account will be kept.

Select **Preview Merge** to review the matches before executing the record merge. We recommend never unchecking this box unless you have a huge number of duplicate groups and you don't want to go through them first. If the Preview Merge option is off, clicking the Next button begins the operation immediately, merging all customers who meet the selected criteria. A customer merge is also a permanent and irreversible action, and likewise should be used only with great care. When this option is on, click Next on the Customer Cleanup screen to access the Merge Customers screen, where you will see your preview.

On the Merge Customers screen, you may select which customer records to include in the merge, grouped as appropriate. If you wish to exclude an entire group from the merge, uncheck the **Merge box** for every customer in that group. (The Group Select All/None checkbox may be used to facilitate this action.) For each group in which at least one customer record is included in the merge, you must select which record to merge into via the "**Into" radio button**.

Merge	Into	No	Name	E-Mail	Created	Last Upd	State/Prov	Type	Orders
☑		Master	Select All/None						
☑		Group #1	Select All/None						
☑	◉	401	Davis, Doreen	doreen.davis@truecommerce.com	3/28/2019	6/3/2019	CA	Consumer	0
☑	○	390	Davis, Doreen	doreen.davis@highjump.com	3/4/2016	4/1/2019	CA	Consumer	4

IMPORTANT NOTES – read carefully:

- If more than 200 groups are eligible for a Customer Merge, the groups are separated into multiple pages as appropriate. The Master Select All/None checkbox affects only the groups on that page. Once you advance and leave a page, you cannot go backwards – if you miss something and remember after you advance, then you will have to begin again.
- Any Saved Credit Cards associated with a merged customer (other than the merge into customer) are *deleted* after the merge. This is a security precaution designed to prevent one customer from receiving access to another's credit cards. So remember – credit cards DO NOT MERGE. If you need a credit card to remain in an account, for example for a club member, you must make the account with the credit card in it, the surviving account.
- Customer Activities will also be merged into the master record.

TIPS:
- Nexternal recommends using the Merge Preview feature unless the number of eligible records is large, and you are certain that you wish to merge all of them.
- Nexternal generally recommends merging into the most recently updated customer record, as this record is likely to be the most up to date, is most likely to be remembered by the customer, and is most likely to be used by the cookie-based automatic customer recognition feature.