



## Travel Manager Help Sheet

### Duplicate Customers

It is quite common for the same customer to be added to Travel Manager several times. This happens when the person entering a booking, decides to enter a new customer without first checking if the customer is already in the system and retrieving their details.

This can make it difficult later on when you need to retrieve a booking by customer name and you find that there are two or more entries for the particular name. Also, there is a report which analyses bookings for an individual customer over time and this report will not be accurate if there is more than one entry for a customer.

To resolve this problem, you need to transfer all bookings into one of the customer records and then delete the other customer records.

For example, there are two customers for the same "Mark Nolan" each with different bookings. To resolve this problem you need to transfer all bookings to one customer entry and then delete the duplicate customer, which is left with no bookings.

In "Data Maintenance" – "Customers", open the customer, which you require to delete from the system and add the word "DELETE" to the end of their name (or some other word so that they stand out). Press F9 to save the customer record.

In "Transactions" – "Customer Transactions", open that customer (e.g. "Mark Nolan Delete"), and List their existing bookings. Open each booking in turn and change the customer name to the customer you want to transfer the bookings to (e.g. "Mark Nolan"). You do this by pressing F4 on the Name field and selecting the required customer from the list. You can enter the first part of the name before pressing F4 to narrow down the list. When you have changed the customer, save the booking and then repeat this step until all bookings have been transferred to the correct customer.

When all bookings have been transferred, go back to Data Maintenance – Customers, open the customer, which you require to delete from the system and press F8 to delete the record.