

# Correcting Duplicate Customers / Vehicles

NOTE: Every shop will have a different degree of database cleanup to do; we can only provide the basic concepts here.

PREVENT creating duplicates by making sure that EVERY person knows to ALWAYS 1) begin all new orders with **Start/F6** to validate customer names and vehicles! 2) When adding appts to **Schedule**, ALWAYS use **Find Customer** to validate existing names!

New orders =  Schedule = 

The first task is to determine which orders and posted invoices are under duplicate names. The next thing is to decide which records are correct and work towards getting all invoices under those customer/vehicle records to preserve all of the repair history. Please note that It is possible to un-post History invoices to correct and later re-post.

TIP: License plates are UNIQUE; if you enter a license plate and press Tab, the software will take the user to that vehicle record. If you find that a license plate must be "freed" from a vehicle record, do this: 1) Delete the characters of the license plate, click **Exit** and when **Are you Deleting this Vehicle's License?** displays, answer **Yes**. The license plate is now free to be entered elsewhere under the desired vehicle record without flipping back to the vehicle record it came from.

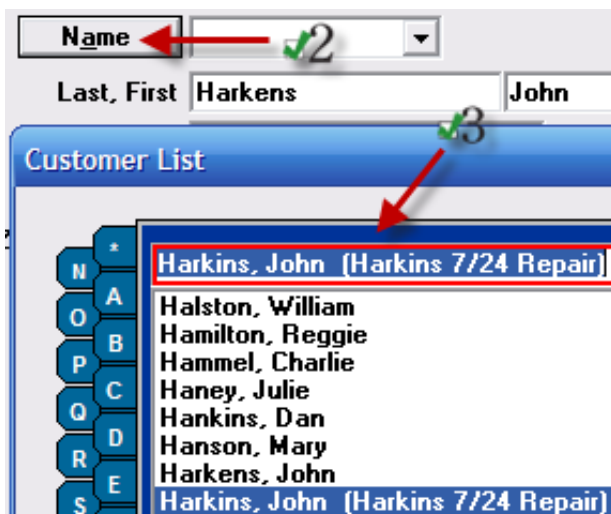
## PART 1: Correcting LIVE orders (still on WIP):

1) Select the order from WIP screen:

RO	146652	Harkens, John	✓
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2) Click on **Customer** Tab, then click **Name** button to get rolodex (customer list) opened

3) Locate the CORRECT Name and highlight it; click **OK** to select it



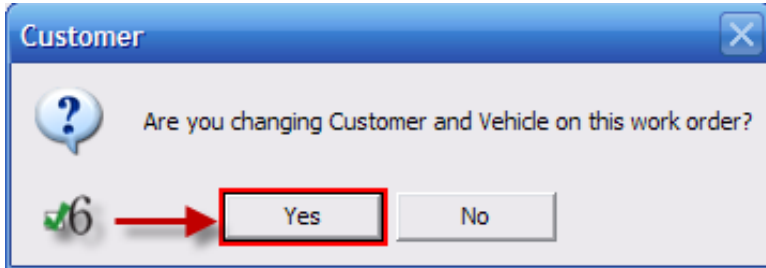
4) Switch to the **Vehicle** tab; select the CORRECT vehicle (if not already highlighted)

License	Year	Make	
456DFE	1991	Toyota	Pickup SR5
789GHI	1991	Toyota	Pickup SR5

5) Click on **Exit** (in Vehicle Screen);



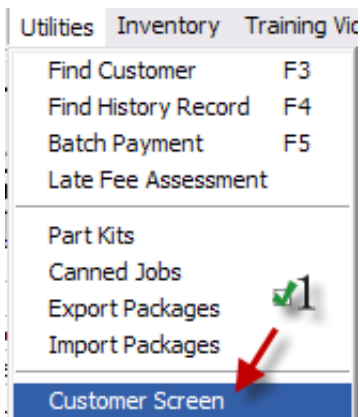
6) Dialog displays: **'Are you changing vehicles on this order?'** will display. Answer **Yes**; this order is corrected.



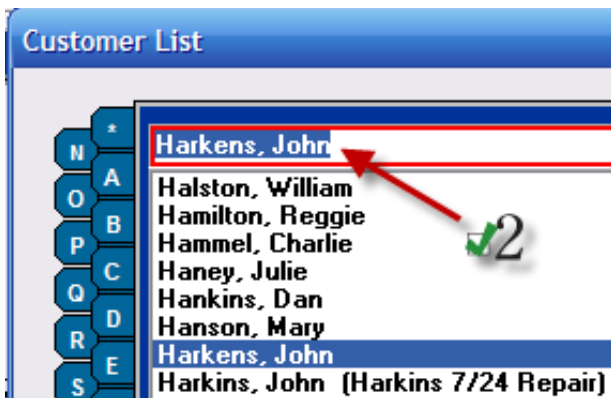
Repeat this process as needed, until all of the invoices under wrong name have been corrected.

## PART 2: Correcting Posted Invoices (History file):

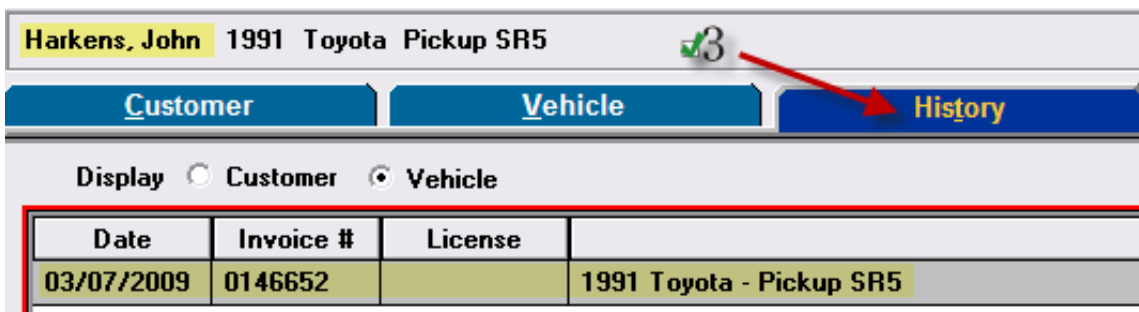
1) Go to **Utilities** menu, select **Customer** Screen,



2) Click on **Name** to open customer list and then select the "wrong" customer and click **OK**.



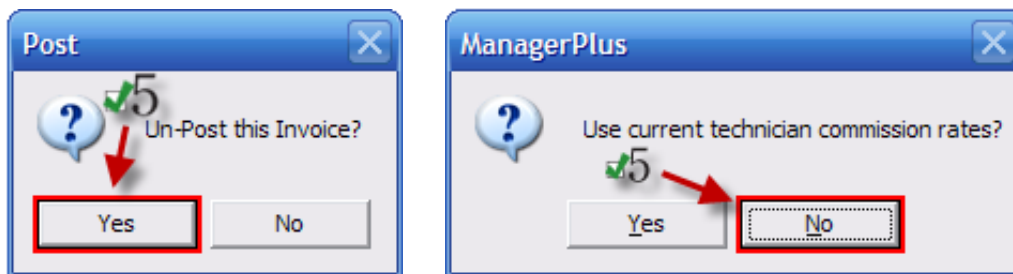
3) With wrong name selected, go to **History** tab



4) With invoice highlighted, click on Un-Post Invoice (answer no to 'use current values' question)



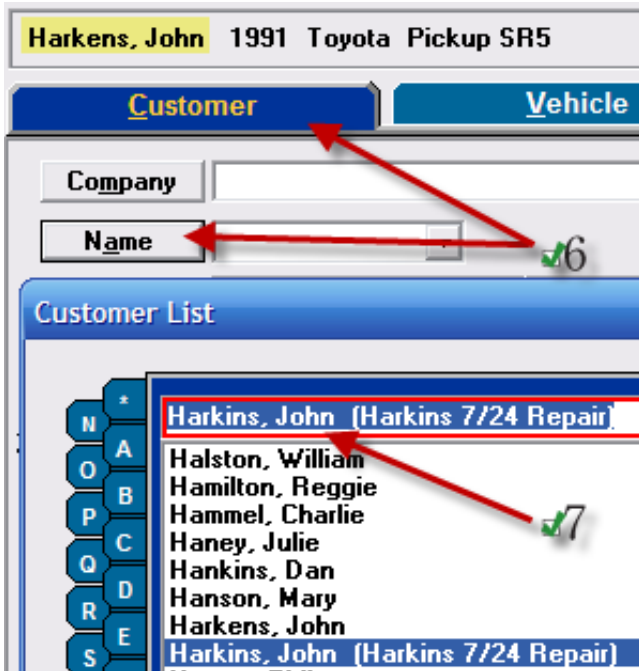
5) Answer YES to 'Un-post this invoice?', answer NO to any questions about "using current technician rates?".



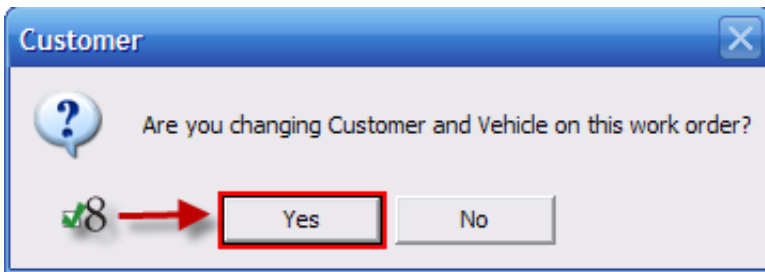
The un-posted order now appears on the Order screen, ready for correction.

6) Click on **Customer** Tab, then click **Name** to retrieve the correct customer record.

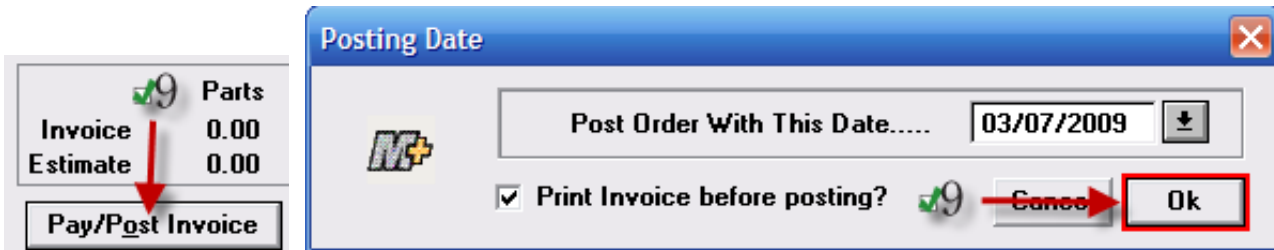
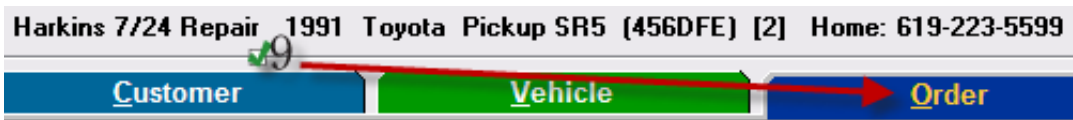
7) Highlight the CORRECT Name, then select the CORRECT vehicle (if not already selected by default)



8) Dialog displays; Are you changing Customer and Vehicle on this work order?'. Answer Yes



9) Click on the Order tab and then click Pay/Post, then OK to re-post this invoice back into the History file.

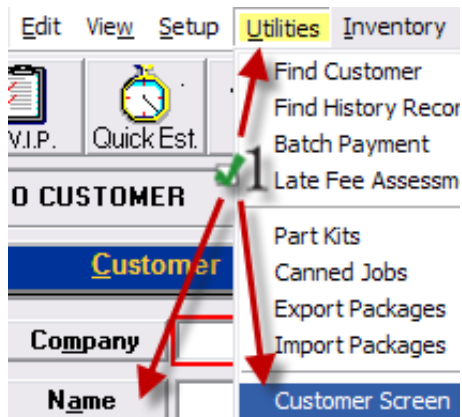


Repeat these steps for any additional invoice corrections.

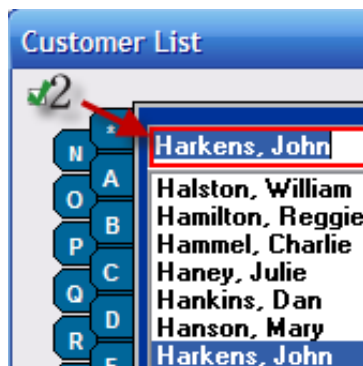
### PART 3: Database Cleanup - Deleting Wrong Customer & Vehicle Records

When all of your open and posted orders are corrected, you can now delete 'wrong' customer/vehicle record(s)

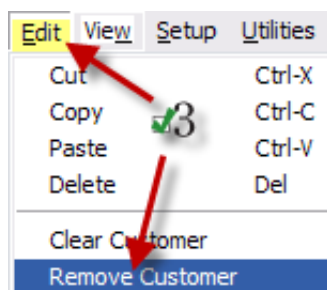
1) Open **Utilities** menu, select **Customer Screen**, then click **Name** to access your 1st 'wrong' customer record.



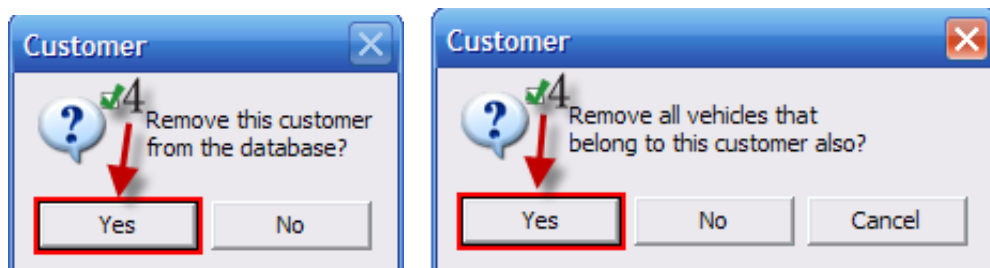
2) Highlight that 'wrong' name and click **OK** (or just double-click it) to select this record.



3) Click on **Edit** menu, select **Remove Customer**.



4) Dialog displays answer **Yes**. Remove all their vehicles = **Yes**



Repeat these steps until your database cleanup task is completed.

**TIP:** It is not possible to remove a customer/vehicle combination when they still have an open Est/RO/Inv.

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