

VAST: Merging Customer Records – Best Practice Guide

PURPOSE

The purpose of this guide is to provide Critical to Quality callouts as well as Best Practice process steps and guidance to enable store employees involved in **Merging Customer Records in VAST**.

By following this guide, you will be able to merge customer records when more than one customer account record exists for the same customer.

SAFETY & QUALITY FIRST

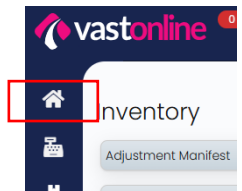
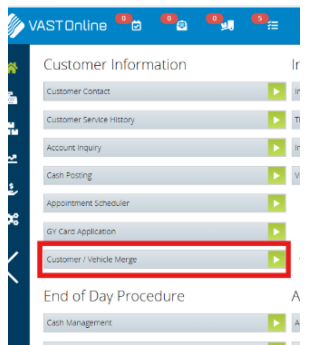
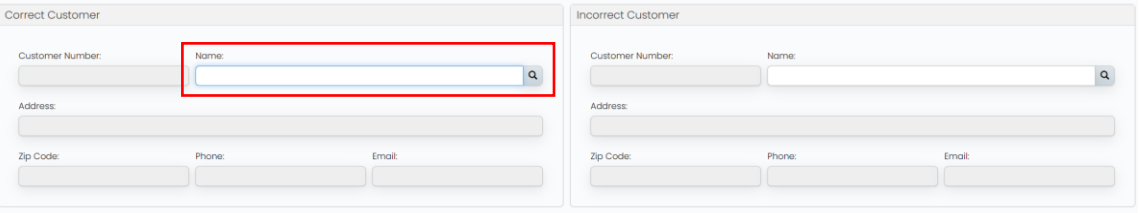


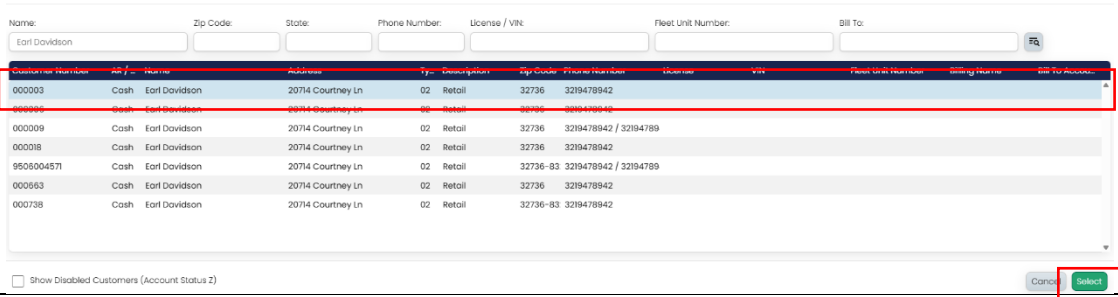
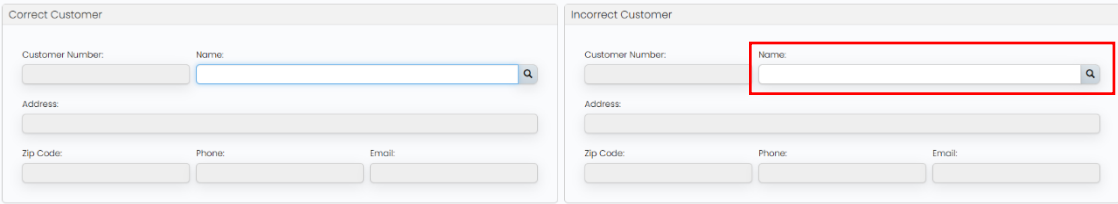
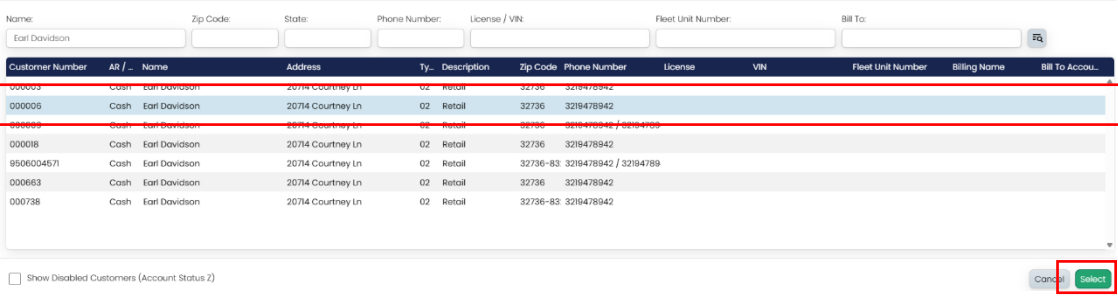
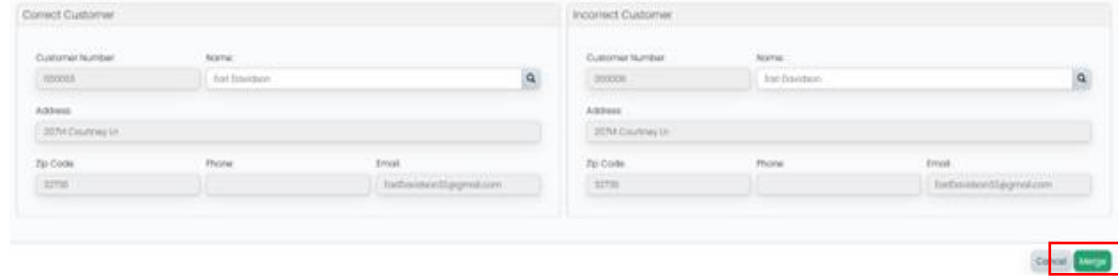
CRITICAL TO QUALITY



- Having a single customer record ensures that all customer service history is easily found in and referenced in one place.

BEST PRACTICE PROCESS STEPS

Step	Action
1	Select the Home page icon in the left-side navigation menu. 
2	Select Customer / Vehicle Merge under 'Customer Information.' 
3	On the 'Customer / Vehicle Merge' page, enter the name of the customer you would like to merge in the 'Name' field (Correct Customer' section) and click the magnifying glass icon to search for the customer. Customer / Vehicle Merge Customer Vehicle Correct Customer Customer Number: Name: Address: Zip Code: Phone: Email: Incorrect Customer Customer Number: Name: Address: Zip Code: Phone: Email: 

Step	Action																																																																																																								
4	On the 'Customer Search' results page, select the appropriate customer record line item and click the Select button in the lower right corner. Customer Search  Customer Search Name: Earl Davidson Zip Code: State: Phone Number: License / VIN: Fleet Unit Number: Bill To: <table border="1"><thead><tr><th>Customer Number</th><th>AR / -</th><th>Name</th><th>Address</th><th>Ty.</th><th>Description</th><th>Zip Code</th><th>Phone Number</th><th>License</th><th>VIN</th><th>Fleet Unit Number</th><th>Billing Name</th><th>Bill To Account</th></tr></thead><tbody><tr><td>000003</td><td>Cash</td><td>Earl Davidson</td><td>20714 Courtney Ln</td><td>02</td><td>Retail</td><td>32736</td><td>3219478942</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>000005</td><td>Cash</td><td>Earl Davidson</td><td>20714 Courtney Ln</td><td>02</td><td>Retail</td><td>32736</td><td>3219478942 / 3219478942</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>000009</td><td>Cash</td><td>Earl Davidson</td><td>20714 Courtney Ln</td><td>02</td><td>Retail</td><td>32736</td><td>3219478942 / 3219478942</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>000018</td><td>Cash</td><td>Earl Davidson</td><td>20714 Courtney Ln</td><td>02</td><td>Retail</td><td>32736</td><td>3219478942 / 3219478942</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>9505004571</td><td>Cash</td><td>Earl Davidson</td><td>20714 Courtney Ln</td><td>02</td><td>Retail</td><td>32736-83</td><td>3219478942 / 3219478942</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>000563</td><td>Cash</td><td>Earl Davidson</td><td>20714 Courtney Ln</td><td>02</td><td>Retail</td><td>32736</td><td>3219478942</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>000738</td><td>Cash</td><td>Earl Davidson</td><td>20714 Courtney Ln</td><td>02</td><td>Retail</td><td>32736-83</td><td>3219478942</td><td></td><td></td><td></td><td></td><td></td></tr></tbody></table> ☐ Show Disabled Customers (Account Status 2) Cancel Select	Customer Number	AR / -	Name	Address	Ty.	Description	Zip Code	Phone Number	License	VIN	Fleet Unit Number	Billing Name	Bill To Account	000003	Cash	Earl Davidson	20714 Courtney Ln	02	Retail	32736	3219478942						000005	Cash	Earl Davidson	20714 Courtney Ln	02	Retail	32736	3219478942 / 3219478942						000009	Cash	Earl Davidson	20714 Courtney Ln	02	Retail	32736	3219478942 / 3219478942						000018	Cash	Earl Davidson	20714 Courtney Ln	02	Retail	32736	3219478942 / 3219478942						9505004571	Cash	Earl Davidson	20714 Courtney Ln	02	Retail	32736-83	3219478942 / 3219478942						000563	Cash	Earl Davidson	20714 Courtney Ln	02	Retail	32736	3219478942						000738	Cash	Earl Davidson	20714 Courtney Ln	02	Retail	32736-83	3219478942					
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7	After both customer records have been selected, click the Merge button. Customer / Vehicle Merge Customer Vehicle  Correct Customer Customer Number: Name: Address: Zip Code: Phone: Email: Incorrect Customer Customer Number: Name: Address: Zip Code: Phone: Email: Cancel Merge																																																																																																								

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8	1. To confirm the customer record merge, click the Yes button on the 'Information' pop-up window. Go to Step 9. 2. Click the No button if any changes are needed. Information  Are you sure you want to merge [000003, Earl Davidson, 20714 Courtney Ln, 32736] with [000006, Earl Davidson, 20714 Courtney Ln, 32736]? 1 No Yes 2																																				
9	On the 'Information Merge complete' pop-up window, click the Ok button to close the window. Information Merge complete Ok																																				
10	If you have multiple customer records for the same customer that you want to merge, select the 'Customer' tab and follow Steps 3 through 9 until all customer records have been merged to just a single customer record. Customer / Vehicle Merge Customer Vehicle Customer: Earl Davidson Correct Vehicle <table><thead><tr><th>License</th><th>Make</th><th>Model</th><th>Engine</th><th>VIN</th><th>V</th></tr></thead><tbody><tr><td></td><td>Buick</td><td>Cascada</td><td>4-1998 1.6L DOHC GA</td><td></td><td>AI</td></tr><tr><td>na</td><td>Volkswagen</td><td>Atlas</td><td>V6-3598 3.6L DOHC</td><td></td><td>AI</td></tr><tr><td></td><td>Chevrolet</td><td>Camaro</td><td>V6- 3.8L DOHC GAS</td><td></td><td>AI</td></tr><tr><td></td><td>Buick</td><td>Cascada</td><td>4-1998 1.6L DOHC GA</td><td></td><td>AI</td></tr><tr><td>4tfrn</td><td>Chevrolet</td><td>Camaro</td><td>4-1998 2.0L DOHC Gv</td><td></td><td>AI</td></tr></tbody></table>	License	Make	Model	Engine	VIN	V		Buick	Cascada	4-1998 1.6L DOHC GA		AI	na	Volkswagen	Atlas	V6-3598 3.6L DOHC		AI		Chevrolet	Camaro	V6- 3.8L DOHC GAS		AI		Buick	Cascada	4-1998 1.6L DOHC GA		AI	4tfrn	Chevrolet	Camaro	4-1998 2.0L DOHC Gv		AI
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