

Merging and Unmerging Customer Accounts

The customer merge functionality is to be used when a possible duplicate customer account has been identified for a Driver's License Verified customer account.

- The customer records can be merged to assist in keeping the records consolidated and holding customers accountable for taxes due on all vehicles.
- The Unmerge Function is for separating previously merged accounts if the merge was done in error.
- To perform a Merge and Unmerge, the User must have permission granted in the 'Add/Edit Customer' checkbox of their User Profile Permissions.

1. The Action Center will include a message with a link to start the merge process.

Driver's License Verified on 07/21/2017
MILLER, TERRY LYNN
 Cust #: 000461859
 299 EASTVIEW DRIVE
 SHEPHERDSVILLE, KY 40165

Buttons: Edit, View, Notes, Financial History

Action Center

- ✘ Customer record contains fields that match another Customer. Click the matching Customer ID **001069015** to begin the Merge process.
- ✘ Customer record contains fields that match another Customer. Click the matching Customer ID **001115316** to begin the Merge process.

2. The green customer account is Driver's License Verified, the circles are for you to choose which info to keep with the final merged account.

MILLER, TERRY Customer ID: 001554001

Personal Information

Birth Date:
 Preferred Name:
 Gender: M
 Citizenship:
 County of Residence: BULLITT

Identification

Driver's License:
 SSN: 404275936
 ITIN:

MILLER, TERRY ALAN Customer ID: 001070557

Personal Information

Birth Date: 06/26/1973
 Preferred Name:
 Gender: M
 Citizenship:
 County of Residence: SPENCER

Identification

Driver's License: M94188359
 SSN: 404275936
 ITIN:

3. Customer Accounts that have been merged will have an 'Unmerge' button to separate the accounts in case it was merged in error. You will be asked which account will have any placards issued and/or vehicles that have been transferred since the accounts were merged.

Driver's License Verified on 05/06/2019
MILLER, TERRY ALAN
 Cust #: 001070557
 7558 HWY 44 E
 MT WASHINGTON, KY 40047
 Phone: (502) 538-3168

Buttons: Edit, View, Unmerge, Notes, Financial History

