

Sonoma Guide Merging Customer Accounts

Instructions for combining two existing customer accounts into one.

1. From the main menu goto **Customers**
2. Find the Customer ID field for each of the two account you would like to combine.
 - * Search for or Find By Name each customer and record the Customer ID field that is found in the upper left corner of the account screen
3. From the Customer Account screen choose “Merge Accounts” from the Action Menu
 - * Click the “Action” button at the top center of the screen to open Action Menu
4. Enter the Customer ID for the account you are going to KEEP into the Customer ID 1 box and click the Verify button next to that.
5. If the account is valid it will show the Customer Name and Card Number for the account you were looking for.
6. Enter the Customer ID for the account you are combining with the first account into the Customer ID 2 box and click the Verify button next to that.
7. If the account is valid it will show the Customer Name and Card Number for the account you were looking for beneath the ID box.
8. If these are the accounts you would like to combine, then click the “Merge Now” button and answer yes when asked to confirm.

This function will take all the Sonoma activity including ratings, rewards, drawings, coupon offers, notes and so on and move them from the second account and add them onto the first account. This will also update their available points balance to reflect the combination of the two sets of activity. The name, address, birth date, and ID information will remain for the original account and the second account will then be deleted.