

## QuickBooks Tips and Tricks

Software: QuickBooks Point of Sale

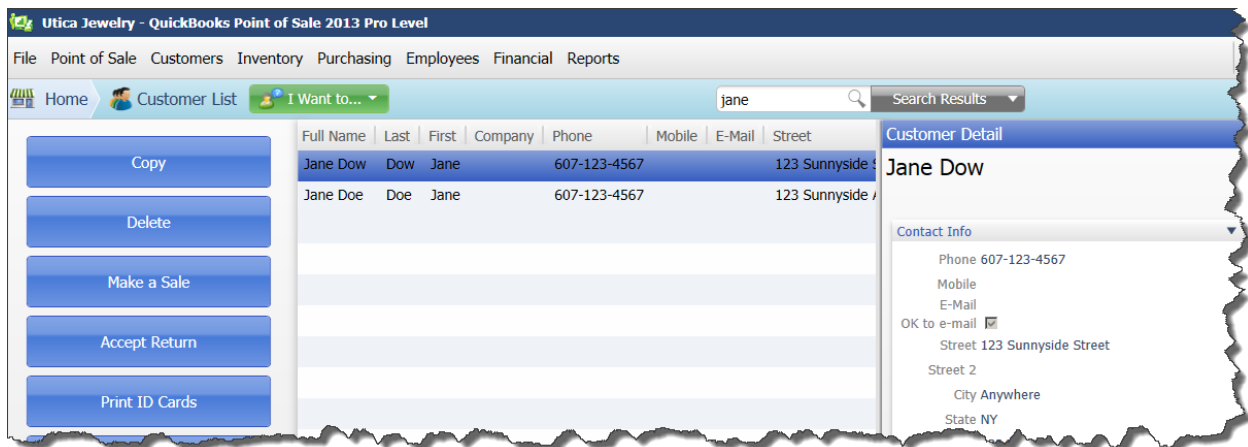
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### Merging Customers in QuickBooks Point of Sale

It is always good practice to review your customer list periodically, cleaning up any inconsistencies, removing any duplicates, and correcting any typographical errors.

You may find that you have more than one record for the same customer, which could occur from misspelling during a lookup, name changes from marriages, or a number of other reasons. QuickBooks POS has a simple way of merging the history of the two records together, and removing the extra record so that all information is accurately in one place.

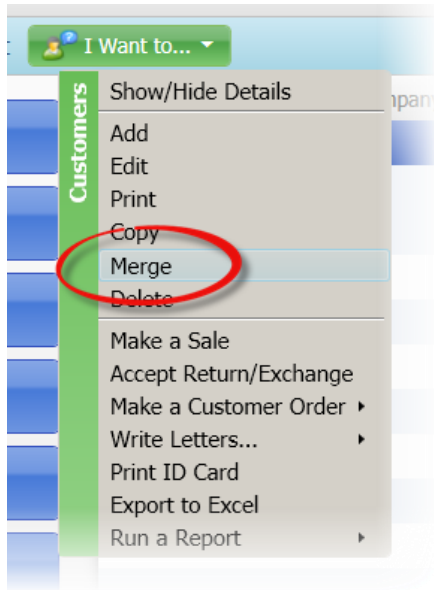
To do this, go to **Point of Sale >> Customers >> Customer List**. In the search field, type the name of the customer which has duplicate records. In the following example, you can see that we have two customer records for Jane Doe – one of them misspelled as “Dow.”



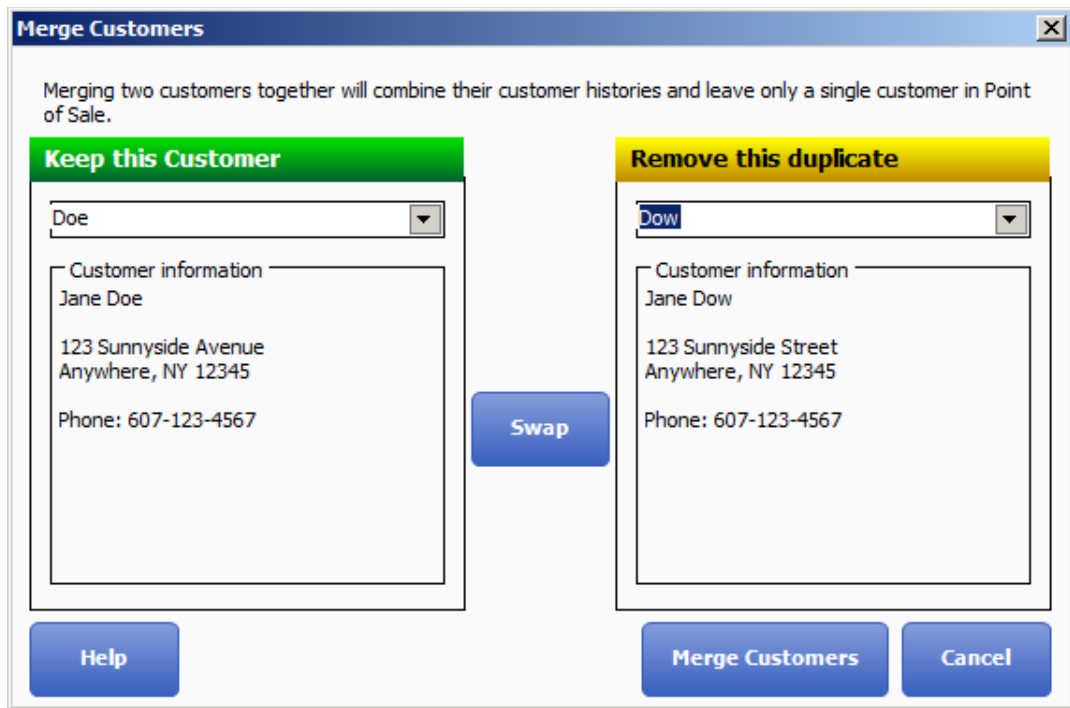
What we effectively want to do is keep the Jane Doe record, and remove the Jane “Dow” record, but send all of the transactions from Jane Dow to Jane Doe so that they are all together in one place.

To do this, click on the record you want to keep and go to the green **I Want To** button... and select **Merge**.

## Merging Customers in QuickBooks Point of Sale, Cont.



You will be brought to the following screen:



As the screen indicates, you will want to be sure the record you want to *keep* is in the left window, and the record that you want to *remove* is in the window on the right. If you find you have them reversed, just click the Swap button on the middle, and it will swap them to the correct order for you. Click **Merge Customers** and all of the transaction history from the record on the right will be merged over into the record on the left, and the extra customer record will be

## Merging Customers in QuickBooks Point of Sale, Cont.

removed. You are effectively left with just one customer record containing all transactions together.



### **NOTE: Exchanging with QuickBooks Financial?**

If you are exchanging customer information with your QuickBooks financial software, the duplicates you have in POS will also be duplicates in financial. Any time you merge or delete a customer in POS, you are prompted to OK the same change in financial. If you are trying to delete a customer record in financial that has transactions, QuickBooks will make it inactive rather than delete it entirely.

The changes in the financial software will not occur until you do a financial exchange (**Financial >> Update QuickBooks**).

*NOTE: When you exchange information with QuickBooks financial software, you always want to rely on POS to drive the changes to financial. Doing the changes in financial first does not push the changes over to POS, and in many cases only adds to further confusion. It is very important to always make the change in POS first, and let the change flow over to your financial software.*

There's no sense putting this task off – take charge now and go get a handle on your customer list. You will be glad you did!