

Duplicate Account and Related Pages

Keeping your Synergy accounts and addresses clean avoids errors, wasted postage costs and ensures data accuracy.

A series of pages are available to help find and clean-up duplicates account and addresses that provide drill-down links to view, fix and delete duplicates to keep the data clean and productive.

There are three primary views of the data; one by account Name, one by Address and one by Account Name and Address.

A search page for each allows you to view the duplicated and then drill down to the detail to update or delete duplicates and see the impact before making a change.

Here is an example of the Duplicate Account page:

Duplicate Accounts, starting with 'a' as of 11/28/2008 5:03:33 PM				
Code	Name	Address 1	City	St
7000060	A & A Quality Jewelers	712 S Olive St, Ste 512	Los Angeles	CA
7000002	A & A Quality Jewelers	712 S Olive St	Los Angeles	CA
990282	A&A MANUFACTURING	5 SOUTH WABASH	CHICAGO	IL
7000064	A&A Manufacturing	5 South Wabash St		IL
970001	ACMA NORDIC AB	ATTN: RAGNAR HASLIGER	SOLLENTUNA	
8800005	ACMA Nordic AB	c/o DHL Danzas Air & Ocean	STOCKHOLM	
7000078	Adel Chefridi Fine Jewels		Woodstock	NY
7000935	Adel Chefridi Fine Jewels		Woodstock	NY

The following is a copy of the Duplicate Addresses page. This helps finds companies that are really the same, but have Company Names entered differently.

Duplicate Addresses, starting with 'at' as of 11/28/2008 5:04:35 PM				
Code	Name	Address 1	City	St
7000169	Atlantic Casting Corp	41-32 27th St	Long Island City	NY
7000170	Atlantic Precious Metal Casting Inc.	41-32 27th St	Long Island City	NY
Count = 2				

The following is a copy of the Duplicate Account and Addresses page. This helps finds true duplicates that are really the same.

Duplicate Account Addresses, starting with '%l' as of 11/28/2008 5:02:59 PM				
Code	Name	Address 1	City	St
9900876	J.B. Jewelers	236 N. Santa Cruz Ave.	Los Gatos	CA
9900877	J.B. Jewelers	236 N. Santa Cruz Ave.	Los Gatos	CA
9901056	Solyndra, Inc	47700 Kato Road		
9901057	Solyndra, Inc	47700 Kato Road	Fremont	CA
Count = 4				

Duplicate Account and Related Pages

Converting Account Codes:

Keeping your data in sync with MAX is another custom capability.

The following page provides an easy way to convert Account Codes to MAX Customer Codes so that these two codes will be the same in both systems. You can update the Account Type as part of the process.

This is handy to keep the Account Codes the same as the MAX Customer ID and change the Account Type when errors are made.

Convert Prospect to New Customer				
Prospect Code	<input type="text"/>	MAX Customer ID	<input type="text"/>	Type
				Customer
				Customer
				Reseller (VAR)
				Prospect
				Lead
				<input type="button" value="Submit"/>

Updated Account Source Code:

Another account related custom page provides an easy means to locate an account and update the Synergy Source Code as shown below.

Update Account Source Data for A & A Quality Jewelers					<input type="button" value="Submit"/>
Company	Address	City	State	Source	
A & A Quality Jewelers	712 S Olive St	Los Angeles	CA	Dental Lab Products	<input type="button" value="Submit"/>

Contact your Exact Account Manager or contact PlusPointDevelopment.Com directly for more information on how you can leverage custom pages to leverage your investment in MAX and Synergy.