

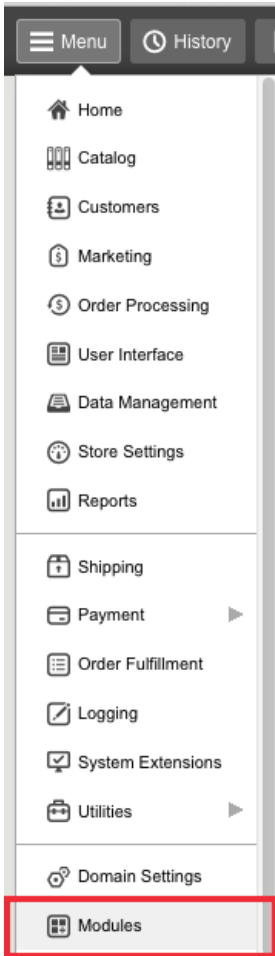
# Miva Merchant 9

CONSOLIDATE CUSTOMERS - INSTALLATION

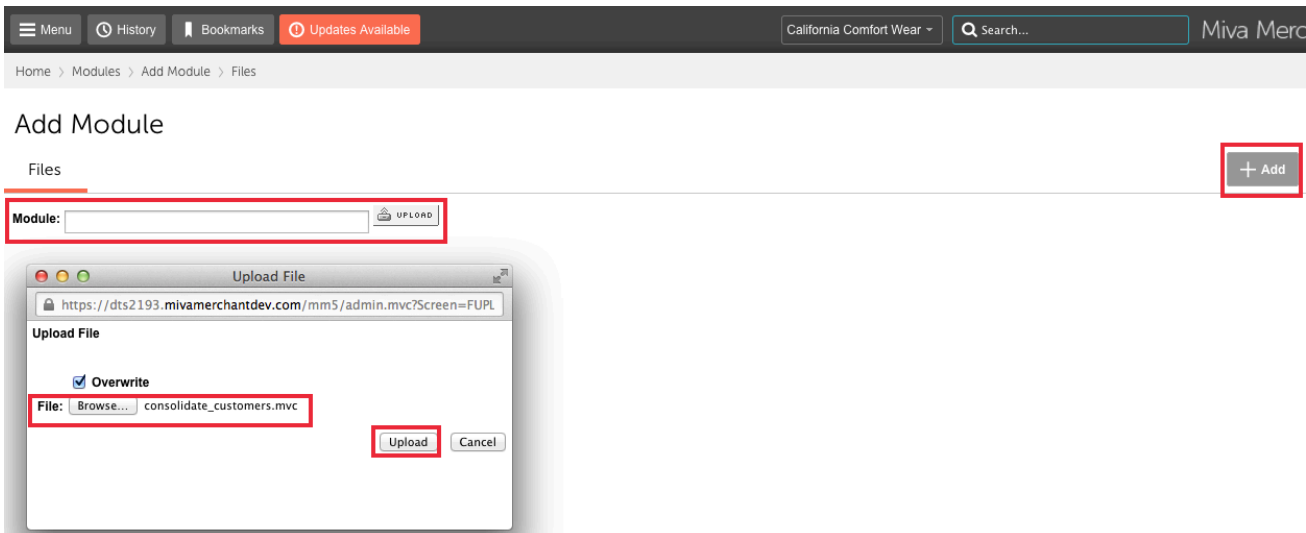
Updated January 2015

# Section 1 - Installing the Consolidate Customers Module

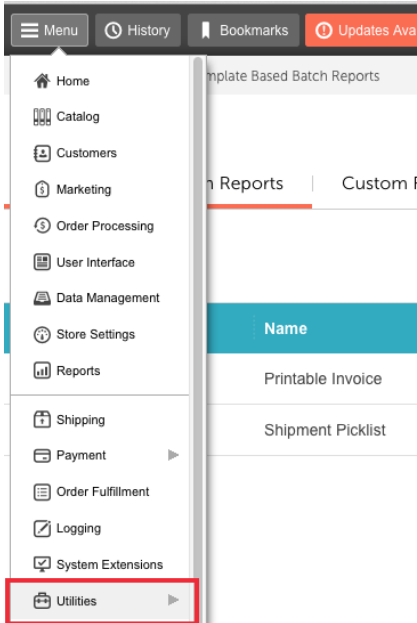
1. Click on your left drop down menu and select “Modules.”



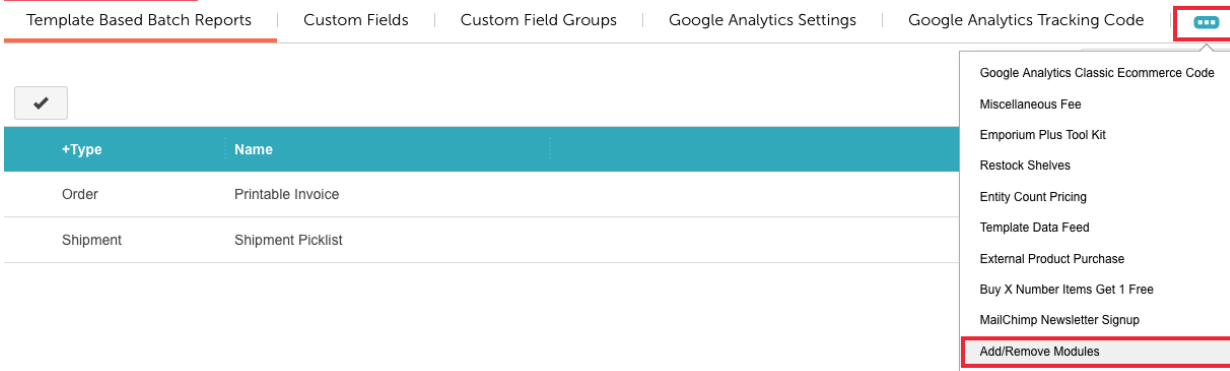
2. Click the “Add” Button and upload the “Consolidate Customers.mvc” module



3. Go to the dropdown menu, select Utilities, then scroll to “Add/Remove Modules”

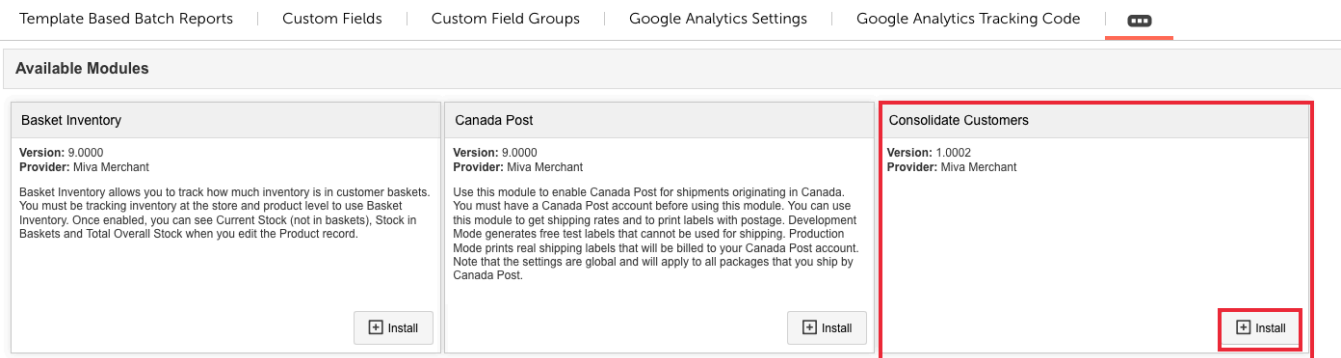


### Utility Settings



4. Find your “Consolidated Customers” Module and Install

### Utility Settings



- Click extended menu and select “Consolidate Customers”  
Now select the button with “Consolidate Customers”  
Download your Log File it created

## Utility Settings

The screenshot shows the 'Utility Settings' page with a navigation bar containing 'Template Based Batch Reports', 'Custom Fields', 'Custom Field Groups', 'Google Analytics Settings', and 'Google Analytics Tracking Code'. Below the navigation bar, there are three radio button options: 'Delete duplicate accounts', 'Use normal field ship2, bill2 addresses' (selected), and 'Use custom field ship2, bill2 addresses'. There are two input fields for 'Ship2 Custom Field Code:' and 'Bill2 Custom Field Code:'. A red box highlights a button labeled 'Consolidate Customers' and a link 'Download Log File'. To the right, a dropdown menu is open, listing various modules, with 'Consolidate Customers' highlighted in red.

## Section 2 - Module Overview

### Here is what the module does when it is run:

- Find all customer records in the customer database where the email lost password (pw\_email) field is the same (case insensitive).
- Of the duplicate accounts per email address, find the first one created (lowest cust id) and make that account the “master account”
- Find the “newest account” based on order history. i.e. the account that has the most recent order. Copy the Bill to and Ship to from the Newest account to the Master account overwriting the existing bill to/ship to for the master account.
- Find all orders tied to the remaining duplicate accounts and move them under the master account. This involves updating the cust\_id field in the orders table to be that of the master account where it was any of the duplicate account ids.
- If Ultimate Order Status is installed, the module will also perform step #4 on the Ultimate Order Status table as well.
- If Ultimate Address module is installed, the multiple addresses will all be consolidated to the master account
- The module gives you the option to delete duplicate accounts (recommended) or leave them. If you choose to leave them, they would be orphaned as the Post Update 7 login functionality will always log the customer into the first account it finds. The only way someone could login into them would be if they knew the “login” value (not the email address)
- There is also the ability to specify custom fields for the bill/ship address 2 fields. This was developed specifically for a client and probably won't be needed by others. If they had custom fields to store address 2 fields the module will read those fields and convert them to the correct address line 2 fields.
- Upon completion, a log file will be available to download which will contain a record of all the changes made.

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## Things to consider before running this module:

- When you install the module and assign it to the store, it will tell you how many duplicate accounts are in the store. If the total number of customer accounts is very large (50k or more), you first need to add an index to some tables to speed up the performance.
- Since this module makes the first account the “master account” if this account had an old password, the customer may not know what it is. In that case they would just need to reset it. If the passwords were the same, then the new account should work as it did before.
- This module does not do anything with price groups or availability groups. If they use either of those, there is a chance they will need to manually reassign customers to them if the first account was never part of the price/availability group.
- Any custom customer fields are not transferred over to the account. This would need to be manually done.
- It is recommended if the client has over 100 duplicate accounts, the module be run on the dev store first and the log file manually spot checked to verify things were merged correctly.