

How to Clean Up and Maintain Your Guest Data

Your guest database may become crowded over time with duplicate records, incomplete guest data and inactive guests. Managing your database is quite easy, but it may be time consuming if your database contains a large number of records.

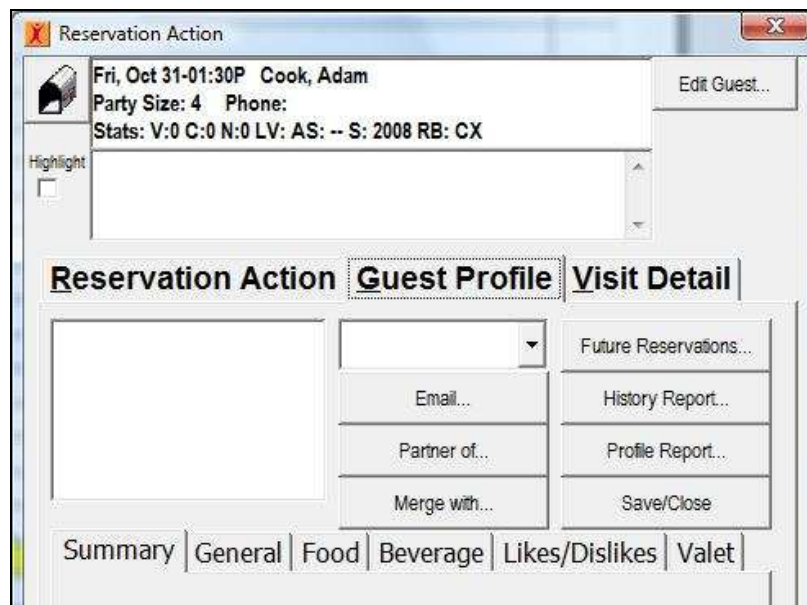
This guide covers merging guest records in the main GuestBridge Reserve application as well as deleting individual records and performing global database maintenance in the Administrator application.

Note: If you are a location who shares guest data with other venues, you will only be able to delete records that originated with your location.

Merging Guest Records in the Main Application

If you have duplicate guest records, they can be merged from the RESERVATION ACTION window.

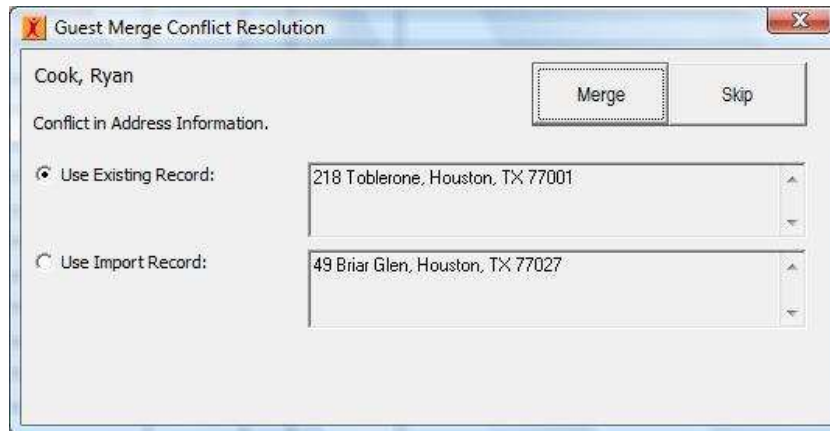
1. Click on the guest's name in the RESERVATION LIST. The RESERVATION ACTION window will appear. Click on the *Guest Profile* tab and then click *Merge with*. The SELECT GUEST window will appear.



RESERVATION ACTION Window

2. In the SELECT GUEST window, search for and select the name of the other guest record you need to merge. Click *Select Existing Guest*.
3. If different data exists in the same field of the two records, the system will display the GUEST MERGE CONFLICT RESOLUTION window so that you can choose the correct data to

save in the merged record. Click *Merge* to continue the merge process.



GUEST MERGE CONFLICT RESOLUTION window

4. You will be prompted to enter your PIN or initials for audit trail tracking. Click *OK*. The guest profiles are now merged and all data combined.

Deleting Individual Records in the Administrator

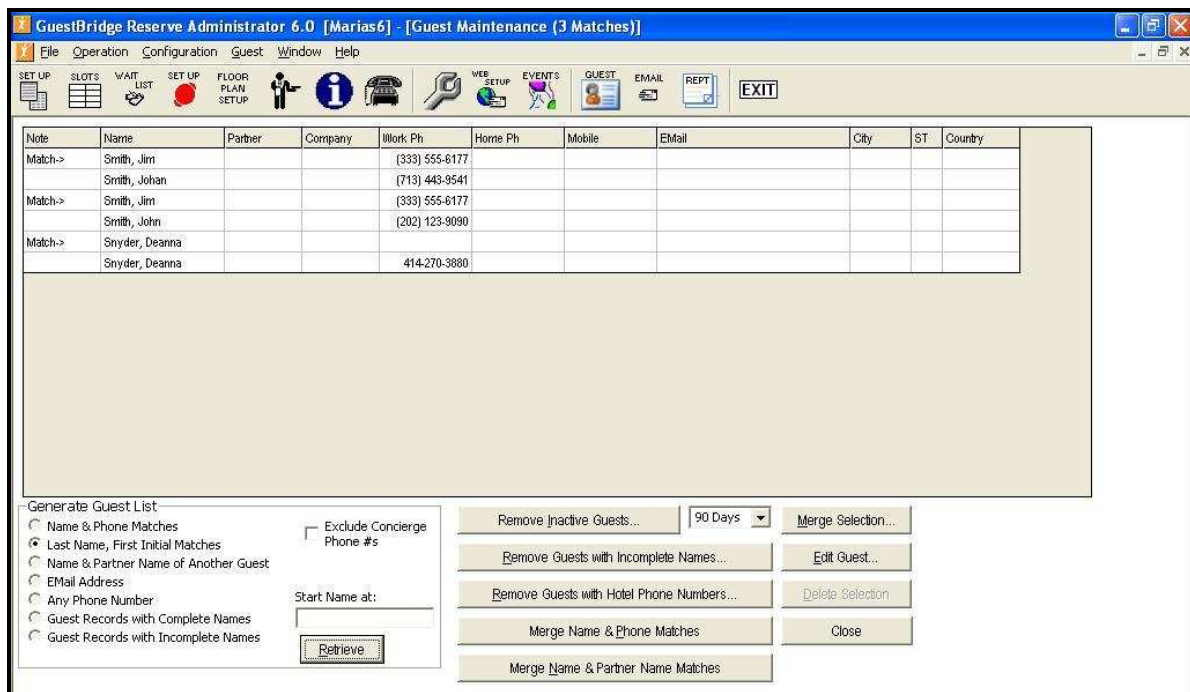
If you need to delete a single guest record from your database, open the GuestBridge Administrator and click on the *Guest* button to open the ADD/EDIT GUEST INFORMATION window.

Search for the guest record you need to delete. Once it is displayed, click *Delete* in the column of buttons on the left side of the window. You will be asked if you are sure you wish to delete this record. Click *Yes* and the guest record will be deleted.

Global Guest Record Maintenance in the Administrator

Note: It is recommended that global database maintenance be performed outside your normal business hours.

To open the GUEST MAINTENANCE window, click on *Guest* and then *Maintenance* in the GuestBridge Administrator's top menu bar.



GUEST MAINTENANCE window

Generate Lists of Possible Duplicates

The GUEST MAINTENANCE window allows you to identify duplicate entries or entries with incomplete information and either merge, delete or keep these entries in your database. It is recommended that you process your database in the order of the buttons below to narrow your clean up of your database most quickly. By selecting any of the boxes in this section and clicking on the *Retrieve* button, the system will generate a list of entries that fit the required characteristics:

- **Name and Phone Matches** – Exact matches for both name and phone number.
- **Last Name, First Initial Matches** – Entries with same last name and first initial.
- **Name and Partner Name of Another Guest** – Guests that are listed as an individual entry as well as a partner/spouse of another guest.
- **Email Address** – Guests with the same email address.
- **Guest Records with Complete Names** – Guests with complete names.
- **Guest Records with Incomplete Names** – Guests with incomplete names.

Additional Options include:

- **Inactive Guests** – Select time period (30 days, 90 days, 180 days, 1 year or 2 years) in the drop down box.
- **Exclude Concierge Phone #s** – Selecting this box will remove any guest entries that have a known Concierge phone number.
- **Start Name At** – If a letter or name is entered in this box, the system will list all guests with names starting with that letter or name and after.

Remove Inactive Guests

To remove the records of guests who have not visited your establishment in a specified period of time, click the *Remove Inactive Guests* button.

1. **Specify Period of Inactivity** – You can delete the records of guests who have not visited your restaurant in a period of time you specify. Select the length of time from the drop-down menu to the left of the *Remove Inactive Guests* button.
2. **Click Remove Inactive Guests** – After selecting the appropriate time period, click *Remove Inactive Guests*. This will permanently delete all records for guests who have not visited your restaurant within the period you determined. This operation may take a few minutes if you have a large number of inactive guests. The system will warn you that this operation cannot be undone. Click *Yes* to continue.

Remove Partial Guest Records

To remove the records of guests with only partial information, follow the steps below.

1. **Click Partial Guest Records** – Under the GENERATE GUEST LIST heading, check the circle next to *Guest Records with Incomplete Names*. Click *Retrieve*. A list of guest records that do not have either a first name or a telephone number will be displayed in the field above the GENERATE GUEST LIST heading. Review this list carefully to ensure that you do not delete records that you wish to keep.
2. **Click Remove Guests with Incomplete Names** – After carefully reviewing the partial guest records, click *Remove Guests with Incomplete Names*. This will permanently delete all records contained in the list in the field above the GENERATE GUEST LIST heading, although the reservation statistics will be kept in the database. The system will warn you that this operation cannot be undone. Click *Yes* to continue. This may take a few minutes. Note that if your database contains more than 1,000 partial Guest records, you will be prompted to repeat this process as necessary.

Merge Exact Duplicate Records Individually

1. **Identify Duplicate Guests** – Under the GENERATE GUEST LIST heading, check the circle next to *Name & Phone Matches*. Click *Retrieve*. A list of guest records that have exact first name, last name and phone number matches will be displayed in the field above the GENERATE GUEST LIST heading. Review this list carefully to ensure that you do not delete records that you wish to keep.
2. **Select Guest Record** – Highlight one of the duplicate guest records.
3. **Merge Record** – Click *Merge Selection*. All history and statistics attributed to the duplicates will be merged into one record.
4. **Resolve Conflicting Information** – If a data field in the duplicate records contains conflicting information, such as a different address, the MERGE GUEST DETAIL (NAME) window will appear and the discrepancy will be highlighted in red. Highlight the row that includes the discrepancy and click *Edit Row*. You will be prompted to choose which record's data to retain, or you can override both records with a new entry.

Merge Exact Duplicates Automatically

1. **Identify Duplicate Guests** – Under the GENERATE GUEST LIST heading, check the circle next to *Name & Phone Matches*. Click *Retrieve*. A list of guest records that have exact first name, last name and phone number matches will be displayed in the field above the GENERATE GUEST LIST heading.
2. **Merge Guests** – Select *Merge Name and Phone Matches*. This process will merge the Guests that were displayed in the field above the GENERATE GUEST LIST heading, but will not affect those records containing conflicting information. The system will warn you that the process may take some time if you have a lot of duplicate records. Click *Yes* to continue the merge. You cannot terminate this process once it has begun, and it is not possible to undo this operation.
3. **Resolve Conflicting Information** – If a data field in the duplicate record contains conflicting information, such as a different partner name, the system will prompt you to resolve the discrepancy. The GUEST MERGE CONFLICT RESOLUTION window will appear. The data field with the conflict will be identified, and you will be prompted to choose which record's data to retain.

Edit Guest Records

If you have identified a record that you want to edit, highlight the guest record and click *Edit Guest*.

Delete Guest Records

If you have identified a record that you wish to delete completely, highlight the guest record and click *Delete* to remove it. For all deleted records, the reservation statistics will be kept in the database.

If you have any questions, please contact GuestBridge.



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