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Linking / Merging Duplicate Accounts



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1 month ago · Updated

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To merge/link two accounts so that their wardrobes can be shared, follow the steps below.

Store Manager or higher user-level credentials are required to access these settings.

1. Access the customer's profile for the account you want to **keep** and locate the account number at the bottom left of the panel. Copy or write down this number.

SMRT Clothes Tracker

Profile | Preferences | Statistics | Route | Pickup | Notes | Prices | Admin | Settings

Jane Doe
1847 BELLES ST
Clothes Tracker | Wardrobe
+ Order | Pay

Personal Info

First Name: Jane
Last Name: Doe
Business:
Email:
Send Emails?: No Emails
Home Phone:
Cell Phone:
Send Texts?: No Messages
First Name 2:
Last Name 2:
Billing Email:
Add

Additional Contacts

No additional contacts
Registered 10/21/20
Agent: Main
No Orders
Account Number 1302 Internal id: 1302 FS: c_50_1302

Addresses

Billing | Home | Business | Other

Street: 1847 BELLES ST
Apt./Suite:
City: SAN FRANCISCO
State: CA Zip: 94129-1811
Default delivery: ☒
Override

Payment Setting

☒ Autopay - Charge card same day order ready.
☒ Pay when racked or returned.*
☐ Pay one day after order has been racked or returned.*
☐ Pay on day of return to customer.*
☐ Batch orders and pay them on the 15th and the end of every month.
☐ Batch orders and pay them on the 9th and the 24th of every month.
☐ Batch orders and pay them monthly, on the end of every month.
☐ Batch orders and pay them weekly, every Sunday.
☐ POS / COD - Customer pays on pickup.
☐ Statement - Customer is invoiced at end of month.

2. Access the Admin tab in the account's profile that you want to **deactivate** and, Add the account number that will remain active in the Linked Accounts field (you can link as many accounts as you need).

Note: Make sure you transfer any orders on this account to the other account before you deactivate it.

SMRT Clothes Tracker

John Doe
1847 BELLES ST
Clothes Tracker | Wardrobe
+ Order | Pay

Profile | Preferences | Statistics | Route | Pickup | Notes | Prices | **Admin** | Settings

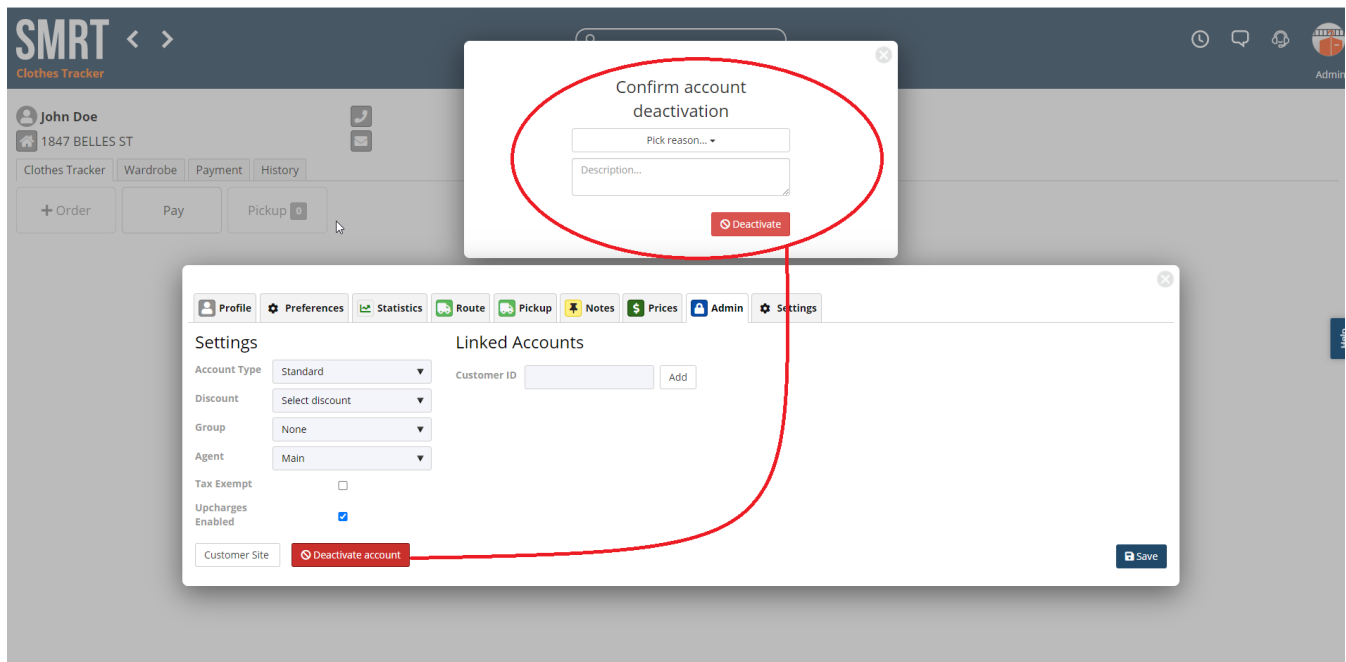
Settings

Account Type: Standard
Discount: Select discount
Group: None
Agent: Main
Tax Exempt: ☐
Upcharges Enabled: ☒
Customer Site: Save

Linked Accounts

Customer ID: Add

3. Click the Deactivate Account button, Pick a reason and enter any further explanation required. Finally, click the Deactivate button.



The wardrobes will now be linked and there will only be one account.



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