CRM guest data: merge and search options

October 2025

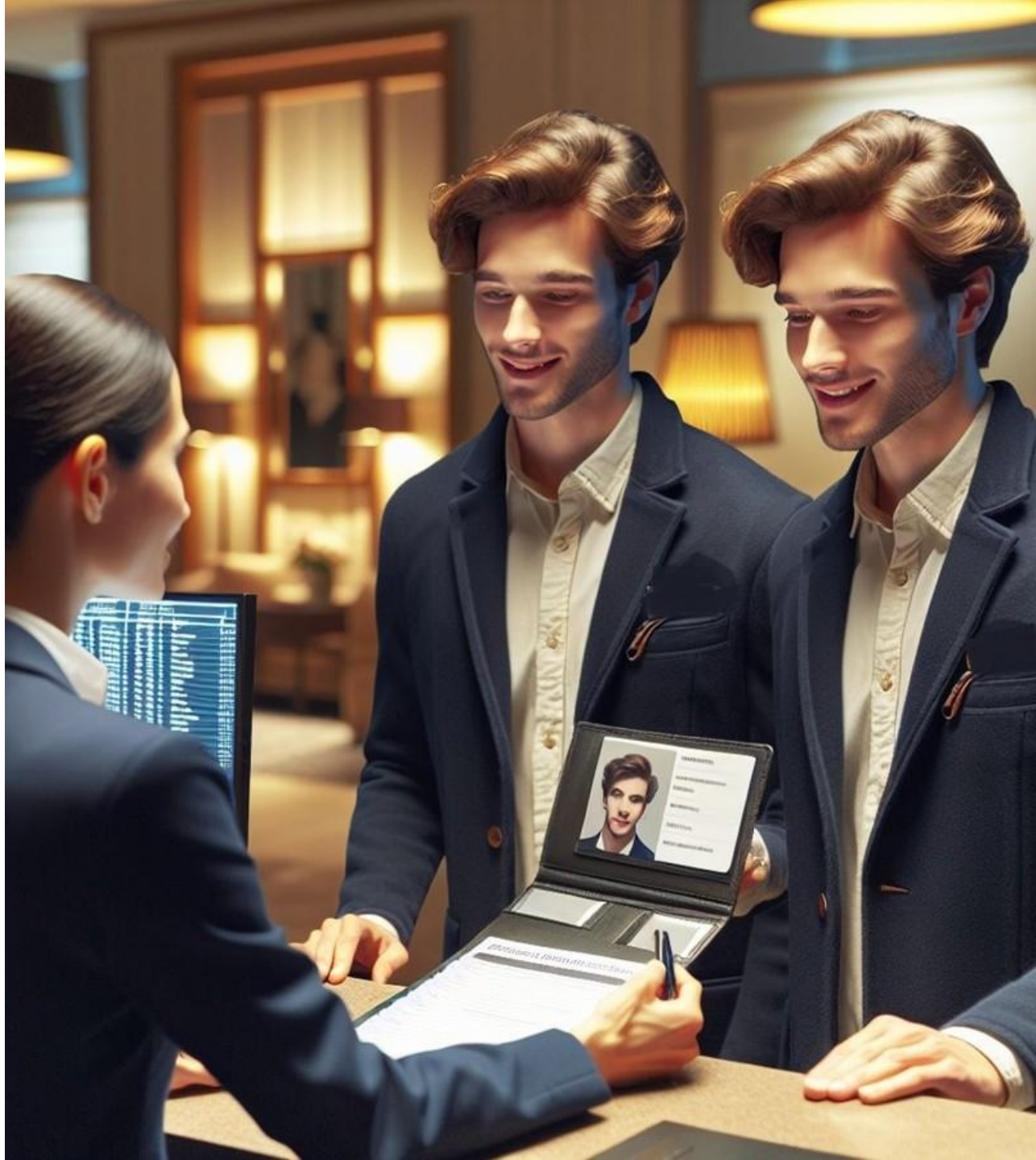
Enhancing guest data management in CRM

There are duplicate profiles in our CRM database due to mismatched email addresses or IDs.

In most cases, the reason is the guest registering for DISCOVERY on our website, where we don't request all the required information.

This creates inefficiencies for front-desk teams, impacts check-in speed, data accuracy, and the overall guest experience.

These improvements enable more accurate customer searches, reduce duplication, simplify profile management and speed up the search.



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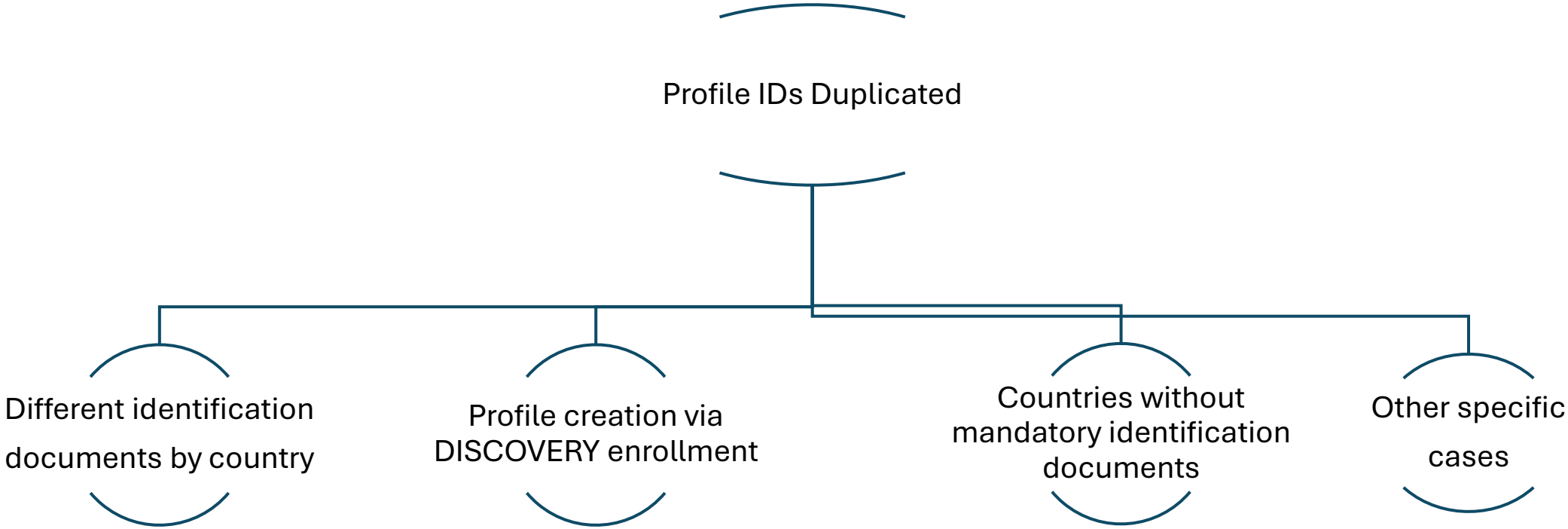
Current situation

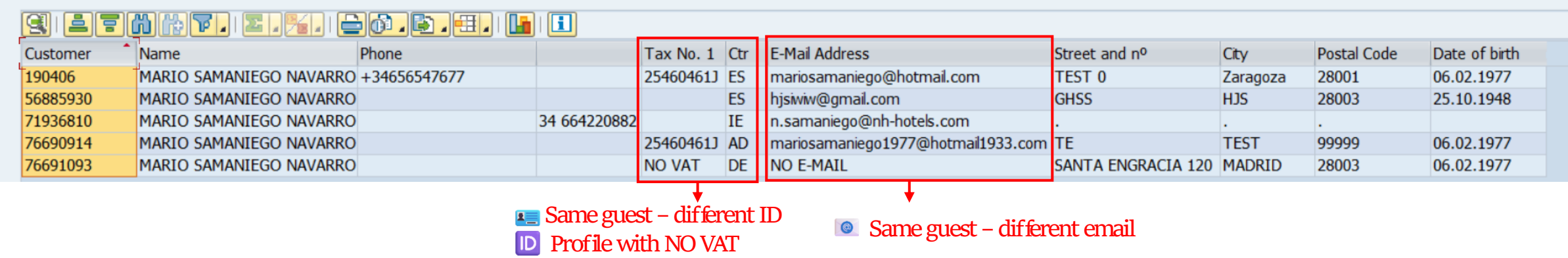
Current situation

Issue detected at Front Office – Different reasons for PROFILE IDs DUPLICATED



Current situation – duplicate guest profiles

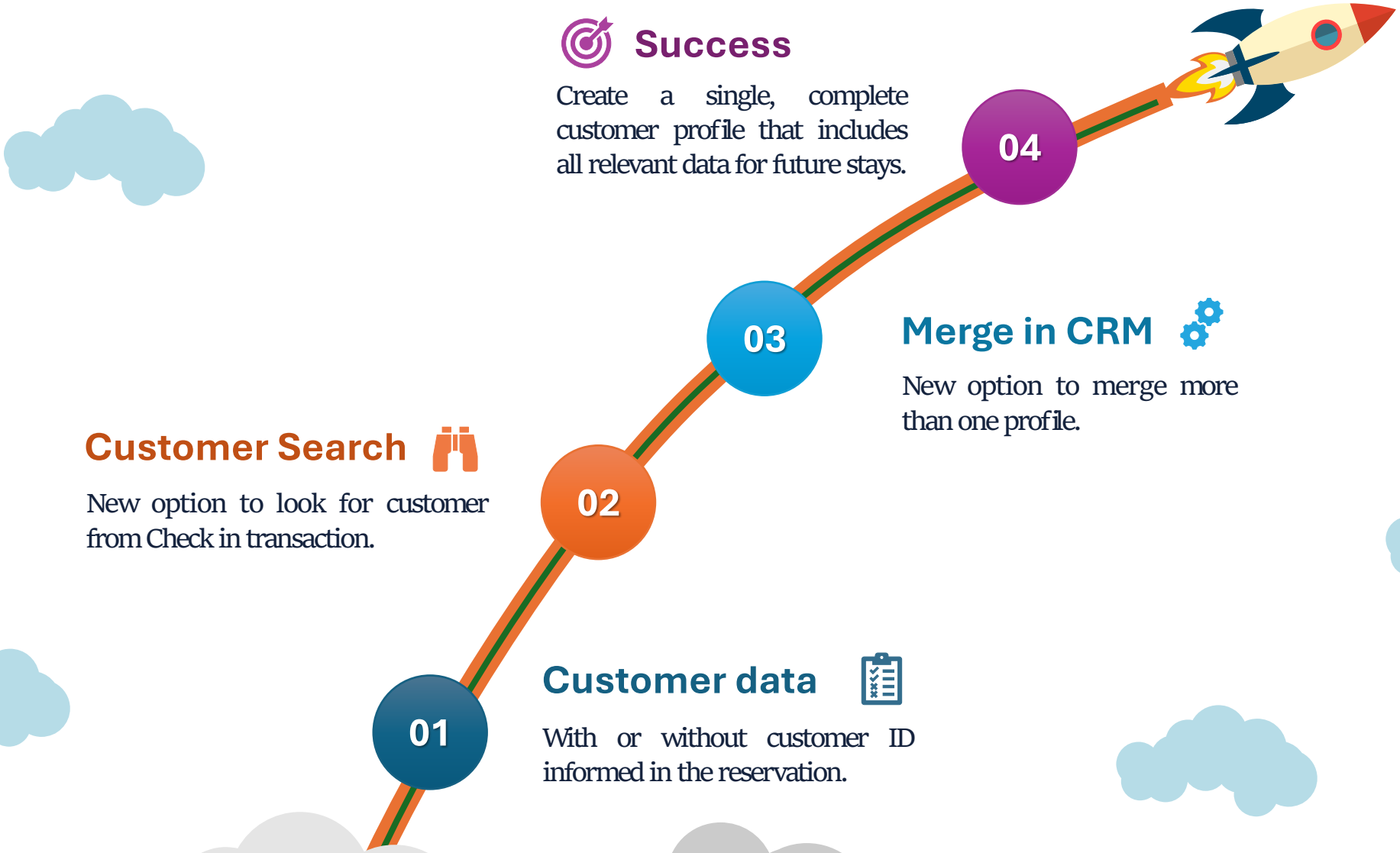
WHY IT HAPPENS:



Customer	Name	Phone		Tax No. 1	Ctr	E-Mail Address	Street and nº	City	Postal Code	Date of birth
190406	MARIO SAMANIEGO NAVARRO	+34656547677		25460461J	ES	mariosamaniego@hotmail.com	TEST 0	Zaragoza	28001	06.02.1977
56885930	MARIO SAMANIEGO NAVARRO				ES	hjsiwiw@gmail.com	GHSS	HJS	28003	25.10.1948
71936810	MARIO SAMANIEGO NAVARRO		34 664220882		IE	n.samaniego@nh-hotels.com	.	.	.	
76690914	MARIO SAMANIEGO NAVARRO			25460461J	AD	mariosamaniego1977@hotmail1933.com	TE	TEST	99999	06.02.1977
76691093	MARIO SAMANIEGO NAVARRO			NO VAT	DE	NO E-MAIL	SANTA ENGRACIA 120	MADRID	28003	06.02.1977

- Different document ID per destination
  Guest uses national ID in one country (e.g., Spain) and Passport in another (e.g., Mexico). Additionally, they may provide a different email address, such as a work email versus a personal one.
- No mandatory ID
  In some countries, profiles are created without ID (e.g., marked as “NO VAT”) due to legal reasons.
- Multiple email addresses
  Guest enrolls in DISCOVERY with a new email (e.g., gmail vs. work email), creating a new profile. Or existing records in the database marked as “No Email.”
- Other specific cases
  Manual errors or system limitations.

Solving profile duplication – our new approach



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Guest merge in CRM

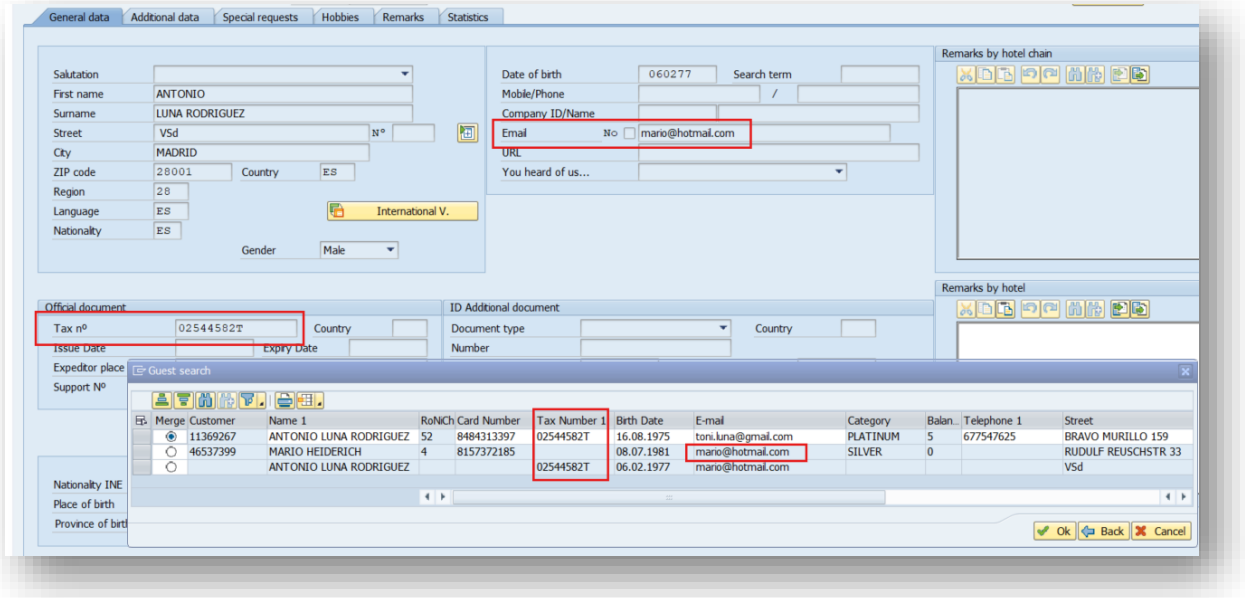
Guest merge in CRM

DUPLICATE DETECTION IN CRM

When accessing CRM from the following transactions:

- Check-in
- Walk-in

This option does not work if the reservation is accessed from other transactions, such as "Modify future Reservation" or "In-house Management" during the stay.



What are the only 2 cases that will trigger the merge pop-up because it is considered a duplicate?

- If the email entered already exists in another Client ID.
- If the Tax nº stated in the Official document already exists in another Client ID from the same Country.

RESULTS AT THE MERGE POP-UP OPTIONS

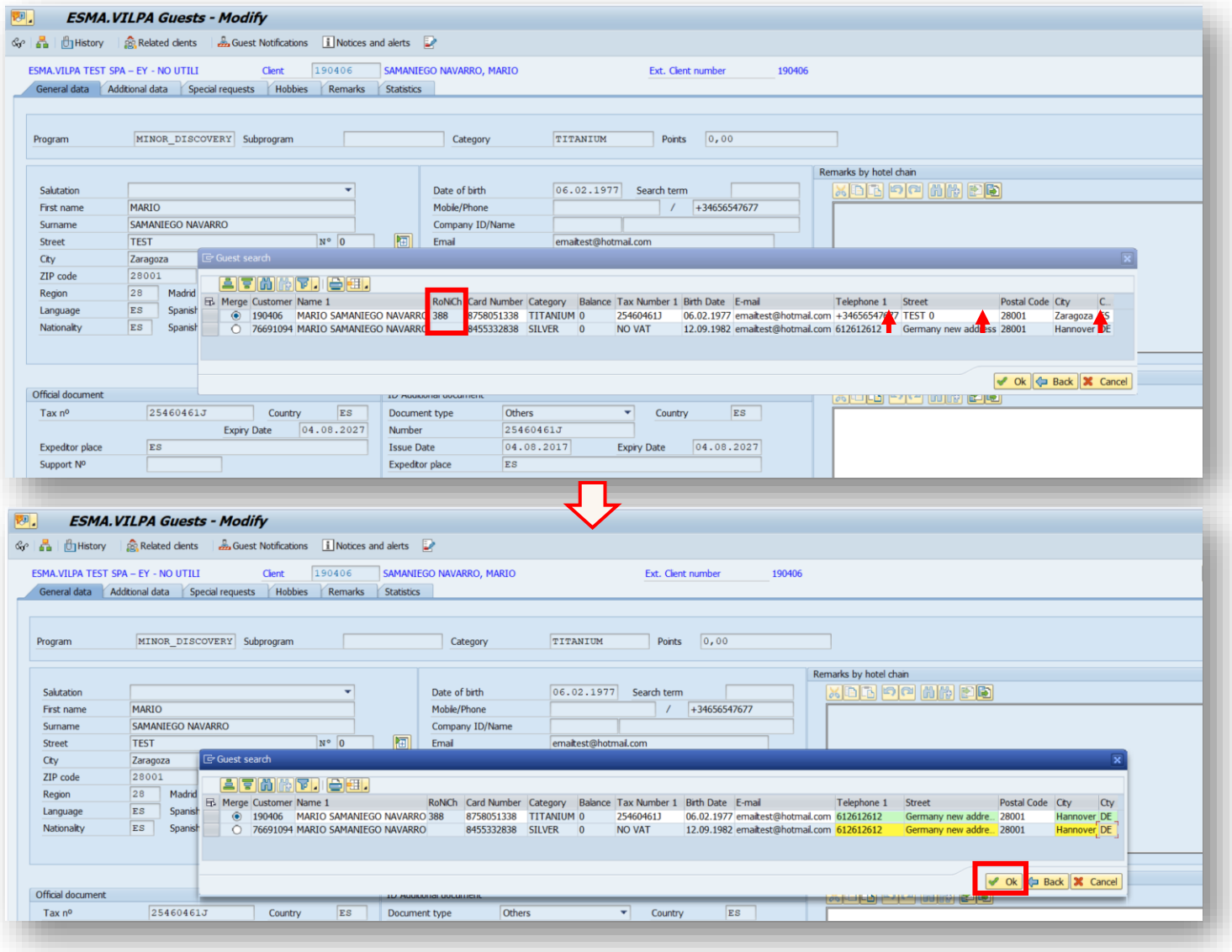
Select *Merge* to choose which profile to keep (restrictions on slide 11 apply). Please ensure that the selected individual possesses all the required information(email, DISCOVERY number…)

The selected profile will be kept, and the others will be flagged for deletion.

Guest merge in CRM

MERGE CONTROL

- Sorting profile IDs by number of stays (RoNCH Room Nights Chain) and existence of DISCOVERY Card Number.
- Possibility of drag and drop or editing (some fields) in "dominant" customer to maintain correct final information.
- Fields in green in the “dominant” customer and in yellow in the other profile.

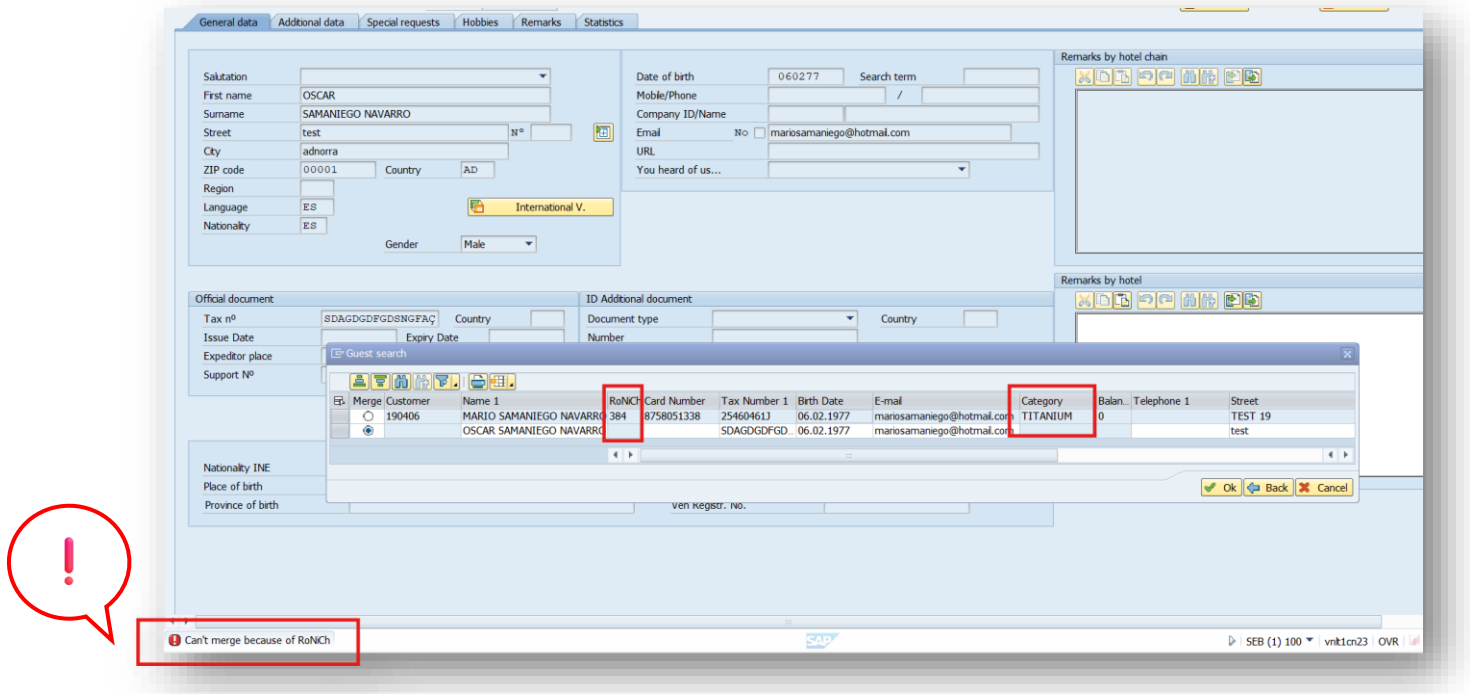


Guest merge in CRM

WHEN IS MERGING NOT ALLOWED?

The merge is restricted in the following cases, i.e. we cannot mark the following profiles for deletion:

- The profile has 10 or more chain room nights (RoNiCh).
- The guest is a DISCOVERY Platinum, Red, or Titanium member.
- The profile belongs to an employee.
- GHA DISC vs Minor DISC and GHA DISC vs GHA DISC.
- The merge cannot be performed when the customer marked for deletion is a DISC member and the customer to be retained is not. In such cases, the membership card (member number) must be transferred in order to proceed with the merge



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Merge guidelines

Merge guidelines

PAY SPECIAL ATTENTION

Email

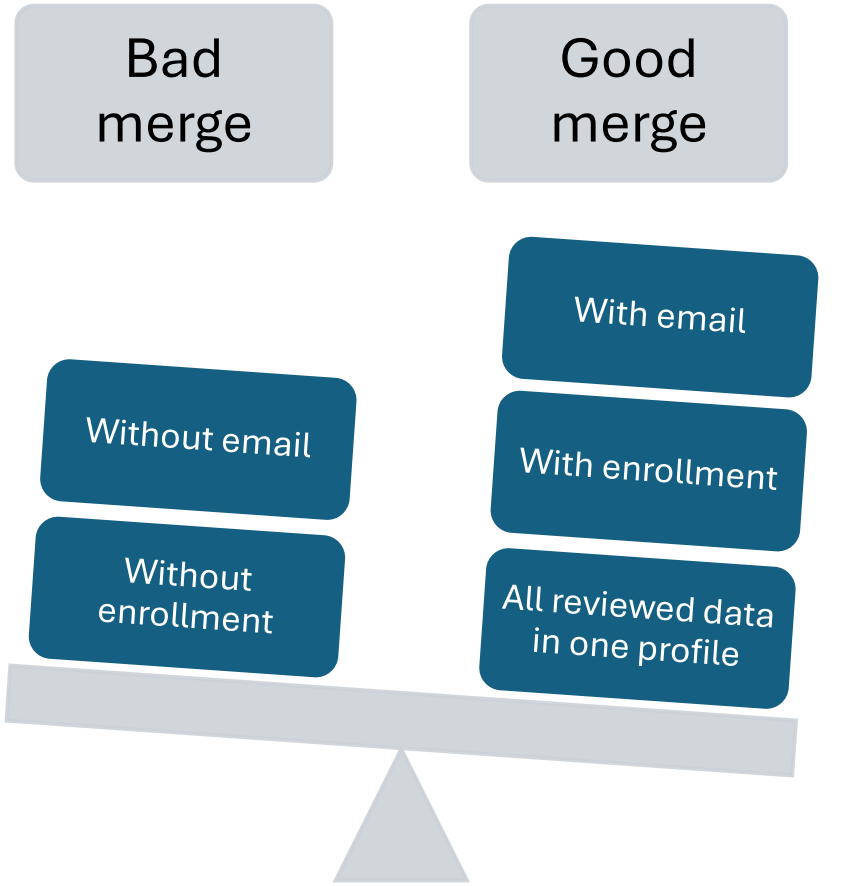
The profile to be maintained must have the email:
Don´t forget to drag and drop the email.
If there is more than one, confirm the right one.

Minor DISCOVERY

The profile to be maintained must have the DISCOVERY member:
Don´t forget to drag and drop the DISC member.
If there is more than one, confirm the right one.

Merge option

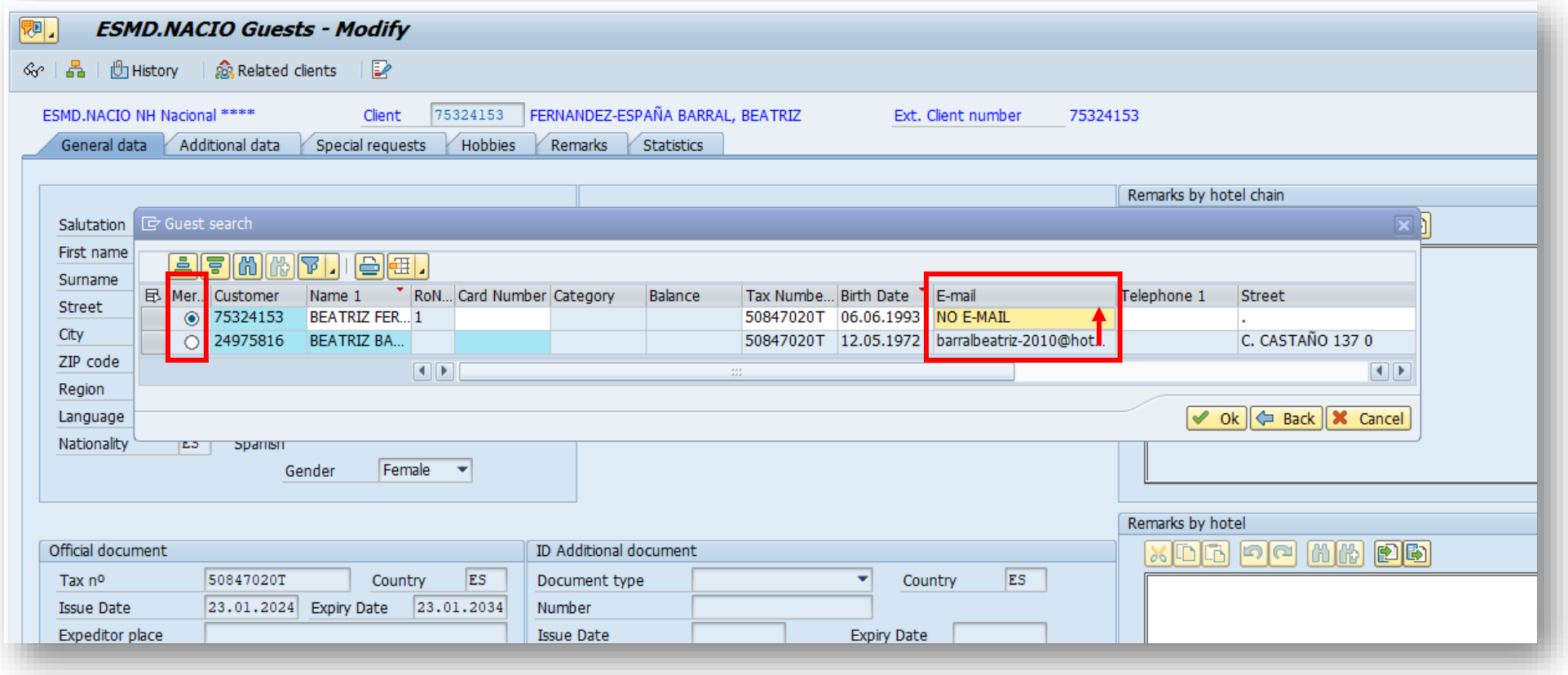
Once merge both profile, confirm all the information is informed properly.



Impact of merging profiles incorrectly vs. correctly

Merge guidelines

All data including the email must be dragged and dropped to the profile to keep:



We may lose an email if we keep the dominant profile without dragging and dropping the email from the profile to be deleted.

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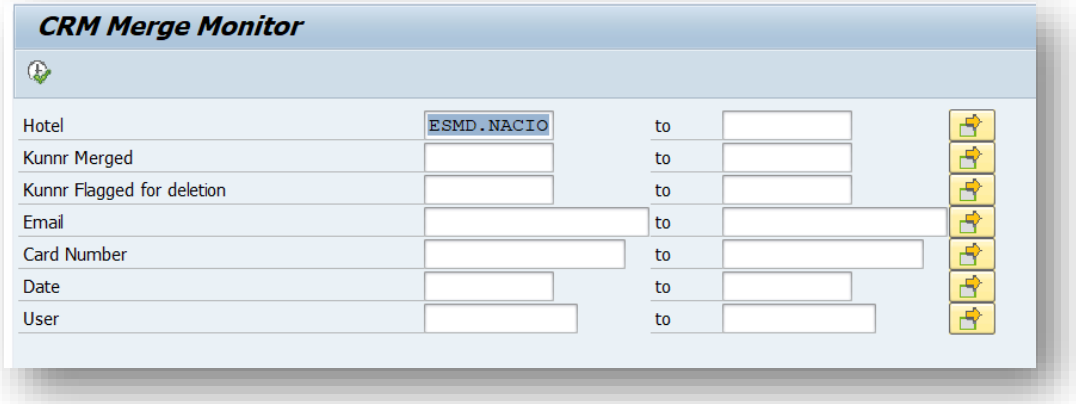
Guest merge monitor

Guest merge monitor

MONITORING MERGES

Use the ZEY_EXPRESS_MERGE – CRM Merge Monitor to:

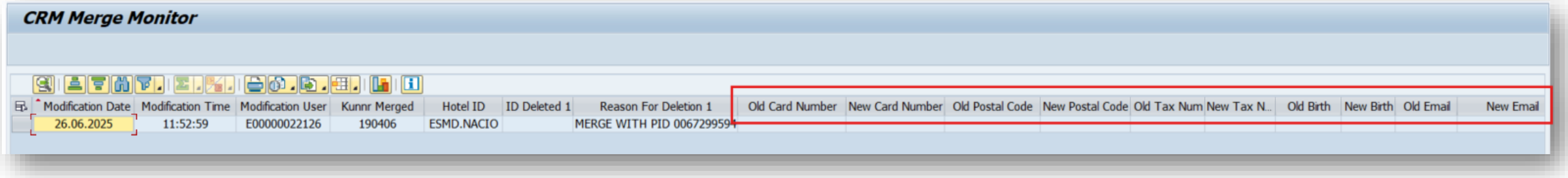
- Filter and view merged profiles
- Track changes made to the dominant profile (the one kept)
- See which profile was deleted and why



Key columns include:

- Modification Date & Time
- User
- Hotel ID
- Deleted ID & Reason

- Old vs. New values for:
  - Card Number
  - Postal Code
  - Tax Number
  - Birth Date
  - Email
  - City & Country
  - GHA ID
  - Inactivation Reasons



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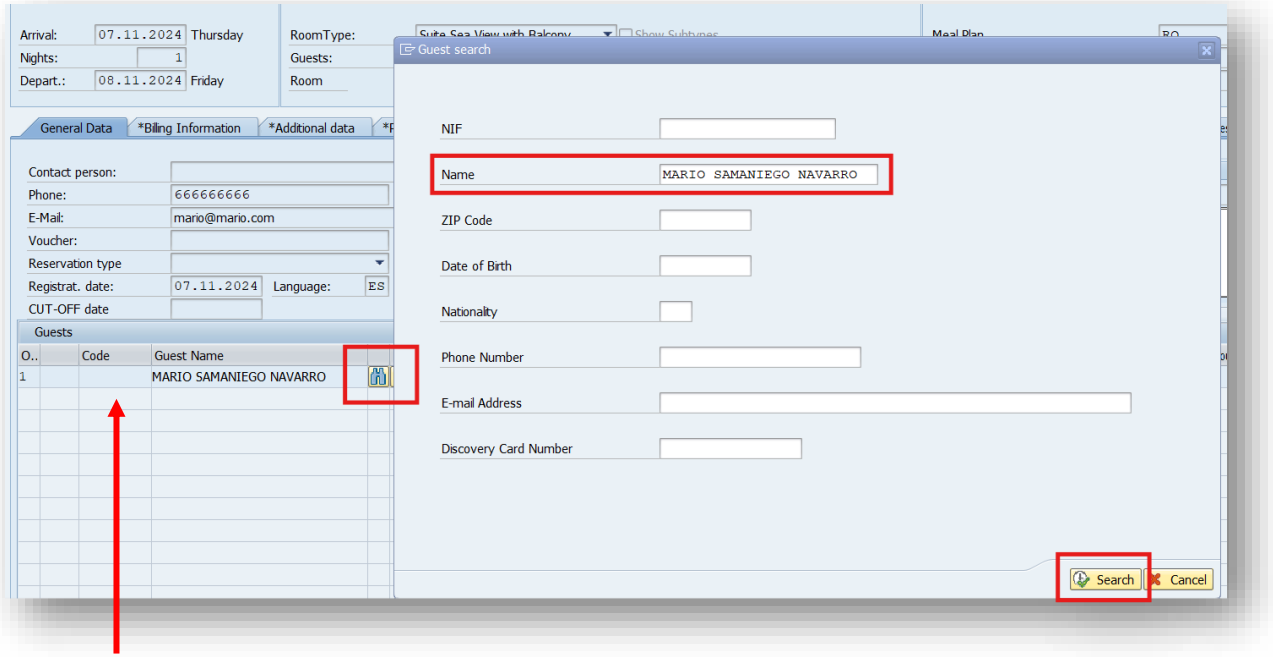
Guest search (new option)

Guest search (new option)

CUSTOMER SEARCH DURING RESERVATION AND CHECK-IN

Situation: In order to improve customer management and avoid duplications, a new option for searching for guests in the reservation has been developed.

By clicking the binoculars icon, a pop-up window appears with the data recorded in the guest line loaded by default:



You can refine the search by entering additional details such as:

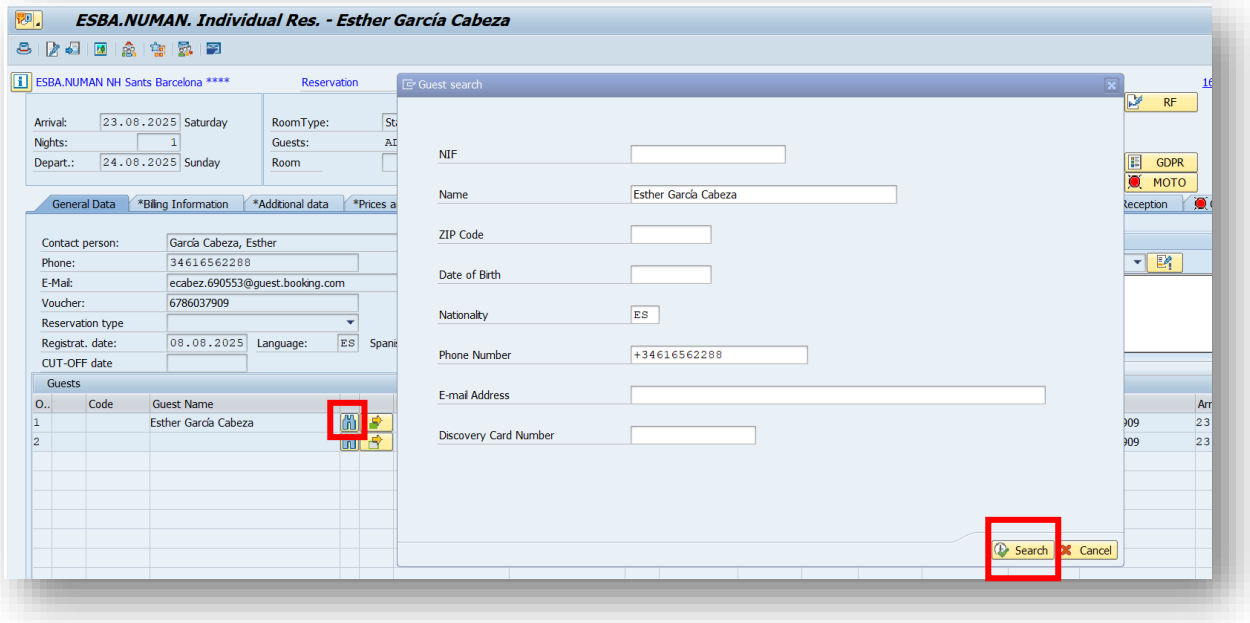
- Document ID
- ZIP code
- Date of Birth
- Nationality
- Phone Number
- Email
- DISCOVERY member

If you double-click the “code” field, you will continue accessing CRM as you do today.

Guest search (new option)

RECOMMENDED STEPS:

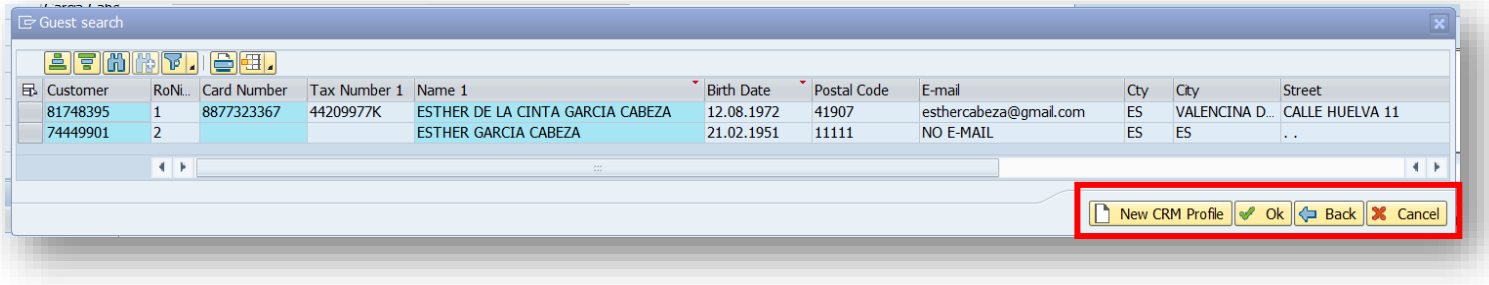
1. Access the new search option
2. Enter additional data and click *Search*
3. Select the correct profile
4. Or create a new one if necessary



SEARCH RESULT OPTIONS

When a potential match is found, TMS displays a pop-up with the following options:

New CRM Profile: create a new customer ID in CRM.
OK: assign the selected customer ID to the reservation.
Back: return to the search window to modify or add information.
Cancel: exit and return to the reservation screen.



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Thank You

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