

# CRM guest data: merge and search options

## October 2025

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# 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.



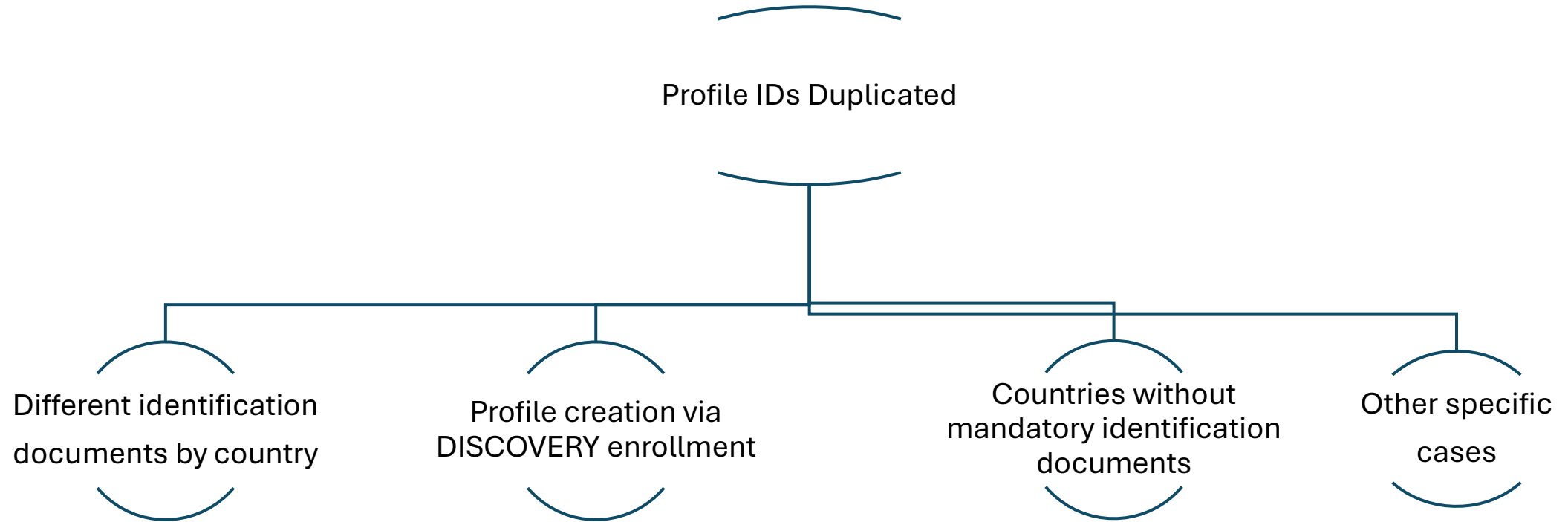
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# Current situation

# Current situation

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







# Current situation – duplicate guest profiles

WHY IT HAPPENS:

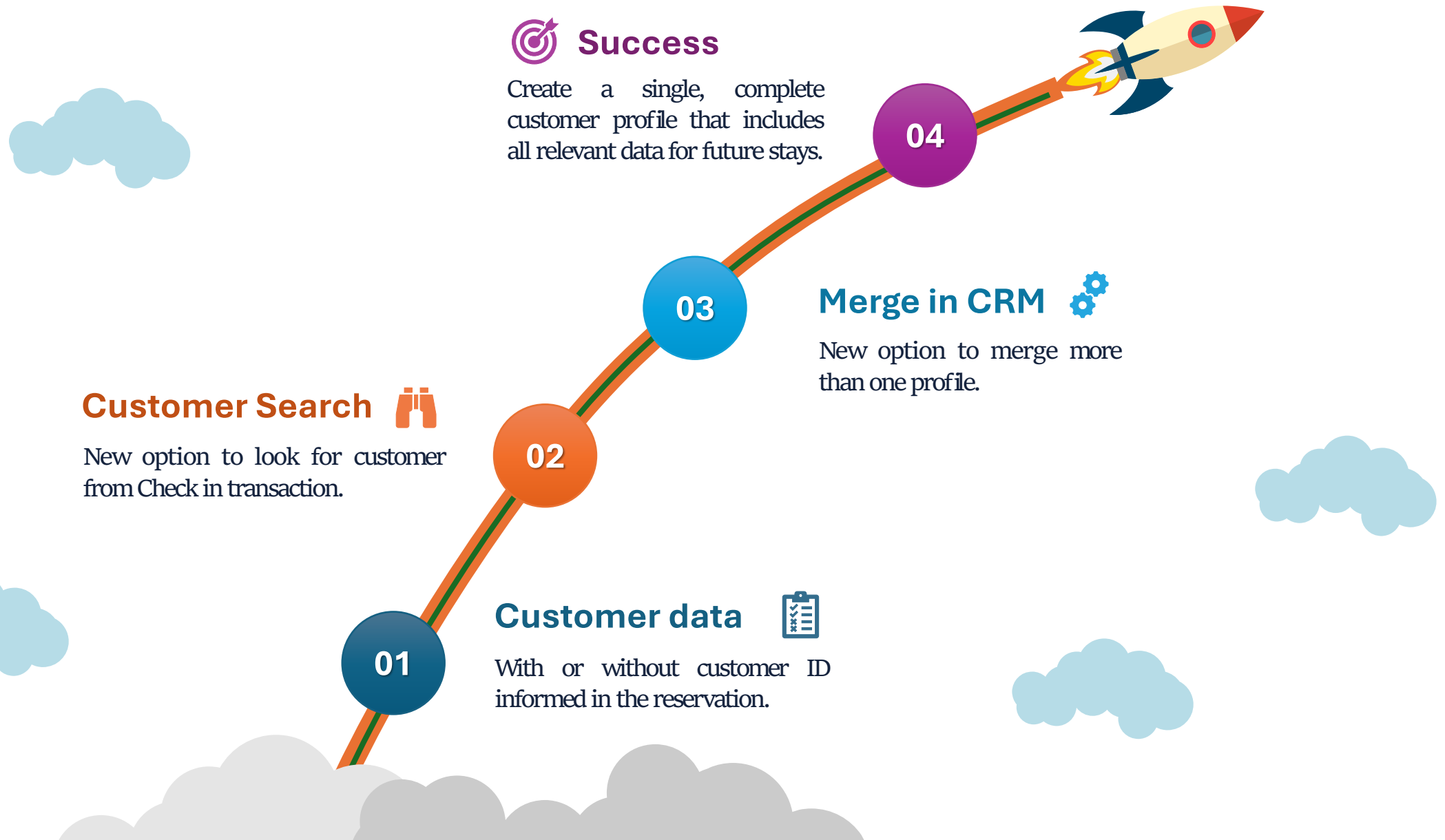
Customer	Name	Phone	Tax No. 1	Ctr	E-Mail Address	Street and nº	City	Postal Code	Date of birth
190406	MARIO SAMANIEGO NAVARRO	+34656547677	25460461J	ES	mariosamaniego@hotmail.com	TEST 0	Zaragoza	28001	06.02.1977
56885930	MARIO SAMANIEGO NAVARRO			ES	hjsiww@gmail.com	GHSS	HJS	28003	25.10.1948
71936810	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

Same guest – different ID  
Profile with NO VAT

Same guest – different email

-  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





# 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.

The screenshot shows a CRM interface with a guest profile for Antonio Luna Rodriguez. The 'General data' tab is active. The 'Official document' section shows a Tax n° of 02544582T, which is highlighted with a red box. The 'ID Additional document' section shows a Document type of 'International V.' and a Country of 'ES'. The 'Guest search' table below shows two entries for Antonio Luna Rodriguez, both with the same Tax Number (02544582T) and Email (mario@hotmail.com). The 'Remarks by hotel chain' and 'Remarks by hotel' sections are empty.

Merge Customer	Name 1	RoNICH Card Number	Tax Number 1	Birth Date	E-mail	Category	Balan.	Telephone 1	Street
11369267	ANTONIO LUNA RODRIGUEZ	52 8484313397	02544582T	16.08.1975	toni.luna@gmail.com	PLATINUM	5	677547625	BRAVO MURILLO 159
46537399	MARIO HEIDERICH	4 8157372185	02544582T	08.07.1981	mario@hotmail.com	SILVER	0		RUDOLF REUSCHSTR 33
	ANTONIO LUNA RODRIGUEZ		02544582T	06.02.1977	mario@hotmail.com				VSD



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 n° 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.

KEY POINTS

# 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.

ESMA.VILPA Guests - Modify

Client: 190406 SAMANIEGO NAVARRO, MARIO Ext. Client number: 190406

General data Additional data Special requests Hobbies Remarks Statistics

Program: MINOR\_DISCOVERY Subprogram: Category: TITANIUM Points: 0,00

Salutation: First name: MARIO Surname: SAMANIEGO NAVARRO Street: TEST N° 0 City: Zaragoza ZIP code: 28001 Region: 28 Madrid Language: ES Spanish Nationality: ES Spanish

Date of birth: 06.02.1977 Search term: Mobile/Phone: / +34656547677 Company ID/Name: Email: emailtest@hotmail.com

Remarks by hotel chain:

Official document: Tax n°: 25460461J Country: ES Expiry Date: 04.08.2027 Document type: Others Number: 25460461J Issue Date: 04.08.2017 Expiry Date: 04.08.2027 Expitor place: ES Expitor place: ES

Guest search:

Merge	Customer	Name	RoNCH	Card Number	Category	Balance	Tax Number	Birth Date	E-mail	Telephone	Street	Postal Code	City	C...
<input checked="" type="radio"/>	190406	MARIO SAMANIEGO NAVARRO	388	8758051338	TITANIUM	0	25460461J	06.02.1977	emailtest@hotmail.com	+34656547677	TEST 0	28001	Zaragoza	ES
<input type="radio"/>	76691094	MARIO SAMANIEGO NAVARRO	8455332838	SILVER	0	NO VAT		12.09.1982	emailtest@hotmail.com	612612612	Germany new address	28001	Hannover	DE

OK Back Cancel

ESMA.VILPA Guests - Modify

Client: 190406 SAMANIEGO NAVARRO, MARIO Ext. Client number: 190406

General data Additional data Special requests Hobbies Remarks Statistics

Program: MINOR\_DISCOVERY Subprogram: Category: TITANIUM Points: 0,00

Salutation: First name: MARIO Surname: SAMANIEGO NAVARRO Street: TEST N° 0 City: Zaragoza ZIP code: 28001 Region: 28 Madrid Language: ES Spanish Nationality: ES Spanish

Date of birth: 06.02.1977 Search term: Mobile/Phone: / +34656547677 Company ID/Name: Email: emailtest@hotmail.com

Remarks by hotel chain:

Official document: Tax n°: 25460461J Country: ES Expiry Date: 04.08.2027 Document type: Others Number: 25460461J Issue Date: 04.08.2017 Expiry Date: 04.08.2027 Expitor place: ES Expitor place: ES

Guest search:

Merge	Customer	Name	RoNCH	Card Number	Category	Balance	Tax Number	Birth Date	E-mail	Telephone	Street	Postal Code	City	C...
<input checked="" type="radio"/>	190406	MARIO SAMANIEGO NAVARRO	388	8758051338	TITANIUM	0	25460461J	06.02.1977	emailtest@hotmail.com	612612612	Germany new address	28001	Hannover	DE
<input type="radio"/>	76691094	MARIO SAMANIEGO NAVARRO	8455332838	SILVER	0	NO VAT		12.09.1982	emailtest@hotmail.com	612612612	Germany new address	28001	Hannover	DE

OK Back Cancel

# 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

The screenshot displays the CRM interface for guest management. A 'Guest search' dialog box is open, showing a list of guests. The 'Merge Customer' column has a red circle next to the first entry. A red box highlights the 'RoNiCh' column, which contains the value '384'. Another red box highlights the 'Category' column, which contains the value 'TITANIUM'. A red speech bubble with an exclamation mark points to a message at the bottom left: 'Can't merge because of RoNiCh'. The background shows the main guest profile form with fields for personal and contact information.

Merge Customer	Name 1	RoNiCh	Card Number	Tax Number 1	Birth Date	E-mail	Category	Balan...	Telephone 1	Street
190406	MARIO SAMANIEGO NAVARRO	384	8758051338	254604611	06.02.1977	mariosamaniego@hotmail.com	TITANIUM	0		TEST 19
	OSCAR SAMANIEGO NAVARRO			SDAGDGDGFGD	06.02.1977	mariosamaniego@hotmail.com				test

Can't merge because of RoNiCh



# 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.



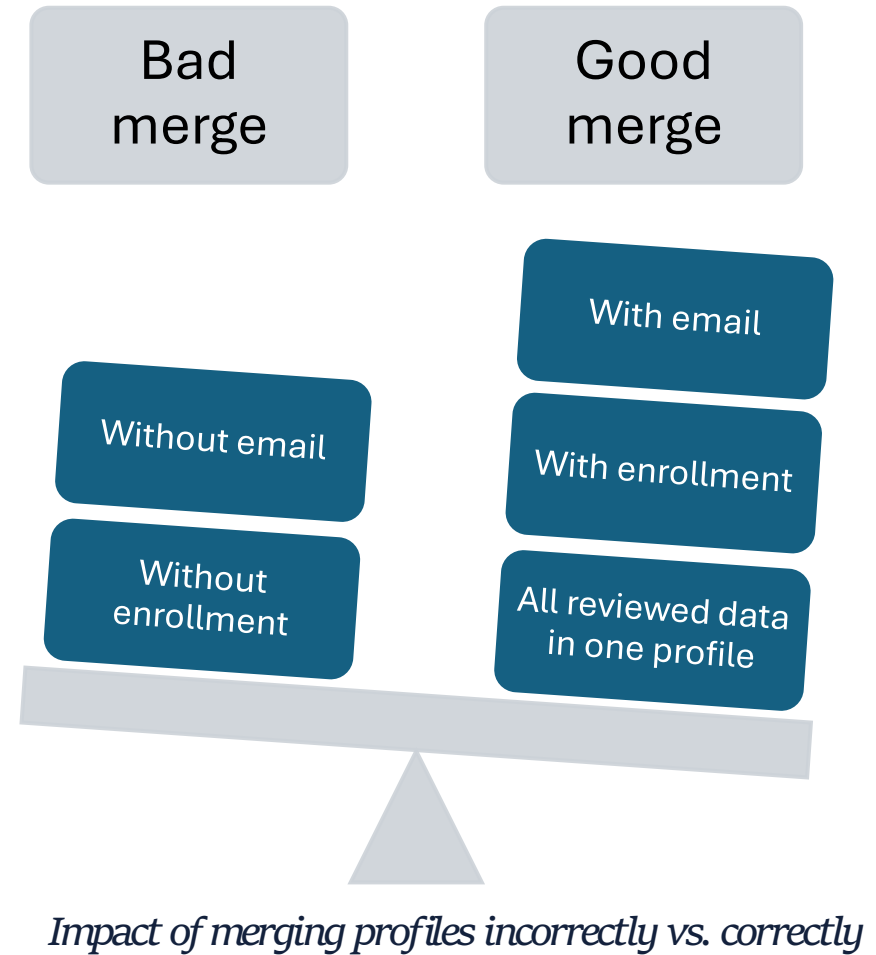
### Minor DISCOVERY

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.



# Merge guidelines

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

The screenshot shows the 'ESMD.NACIO Guests - Modify' window. The client is 'FERNANDEZ-ESPAÑA BARRAL, BEATRIZ' with ID '75324153'. The 'General data' tab is active. A 'Guest search' window is open, displaying a table with two entries. The first entry, with ID '75324153' and name 'BEATRIZ FER...', is highlighted with a red box. The 'E-mail' field for this entry contains 'NO E-MAIL'. The second entry, with ID '24975816' and name 'BEATRIZ BA...', has the email 'barralbeatriz-2010@hotmail.com'. A red arrow points to the 'E-mail' field of the first entry. Below the table, there are fields for 'Official document' (Tax n°, Issue Date, Expiry Date, Expedito place) and 'ID Additional document' (Document type, Number, Issue Date, Expiry Date). The 'Remarks by hotel' section is also visible.

Mer..	Customer	Name 1	RoN...	Card Number	Category	Balance	Tax Numbe...	Birth Date	E-mail	Telephone 1	Street
<input checked="" type="radio"/>	75324153	BEATRIZ FER...	1				50847020T	06.06.1993	NO E-MAIL		.
<input type="radio"/>	24975816	BEATRIZ BA...					50847020T	12.05.1972	barralbeatriz-2010@hotmail.com		C. CASTAÑO 137 0

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



# 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

CRM Merge Monitor				
				
Hotel	<input type="text" value="ESMD.NACTIO"/>	to	<input type="text"/>	
Kunnr Merged	<input type="text"/>	to	<input type="text"/>	
Kunnr Flagged for deletion	<input type="text"/>	to	<input type="text"/>	
Email	<input type="text"/>	to	<input type="text"/>	
Card Number	<input type="text"/>	to	<input type="text"/>	
Date	<input type="text"/>	to	<input type="text"/>	
User	<input type="text"/>	to	<input type="text"/>	

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

[illegible]





**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:

The screenshot shows the CRM interface with a 'Guest search' pop-up window. The window has tabs for 'General Data', '\*Billing Information', and '\*Additional data'. The 'General Data' tab is active, showing fields for NIF, Name (MARIO SAMANIEGO NAVARRO), ZIP Code, Date of Birth, Nationality, Phone Number, E-mail Address, and Discovery Card Number. A red box highlights the 'Name' field. Another red box highlights the binoculars icon in the 'Guests' table. A red arrow points to the 'code' field in the 'Guests' table.


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

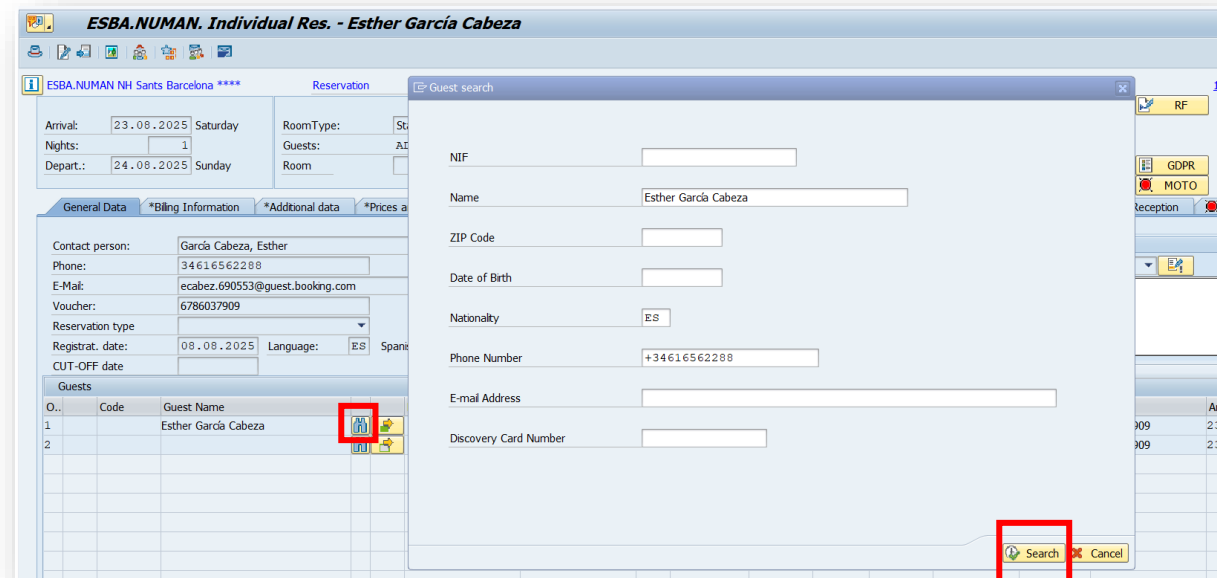
- Document ID
- ZIP code
- Date of Birth
- Nationality
- Phone Number
- Email
- DISCOVERY member

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



ESBA.NUMAN. Individual Res. - Esther García Cabeza

Arrival: 23.08.2025 Saturday  
Nights: 1  
Depart.: 24.08.2025 Sunday

RoomType: St  
Guests: AT  
Room:

General Data \*Billing Information \*Additional data \*Prices a

Contact person: García Cabeza, Esther  
Phone: 34616562288  
E-Mail: ecabez.690553@guest.booking.com  
Voucher: 6786037909  
Reservation type:   
Registrat. date: 08.08.2025 Language: ES Span  
CUT-OFF date:

Guests

O..	Code	Guest Name
1		Esther García Cabeza
2		

NIF:   
Name: Esther García Cabeza  
ZIP Code:   
Date of Birth:   
Nationality: ES  
Phone Number: +34616562288  
E-mail Address:   
Discovery Card Number:

Search Cancel

## SEARCH RESULT OPTIONS

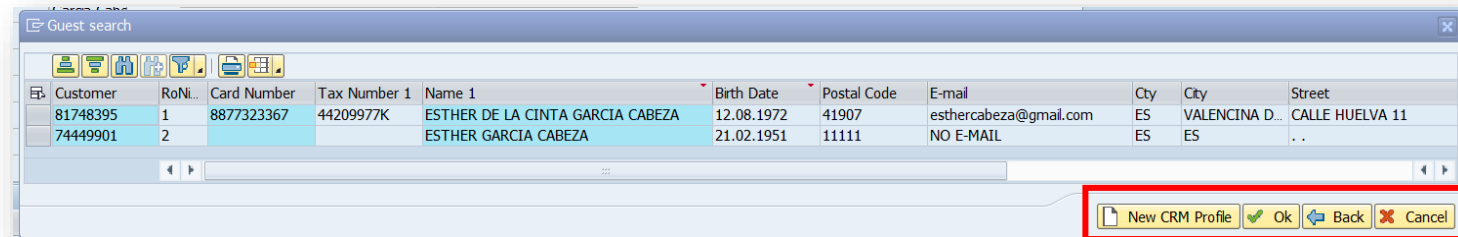
When a potential match is found, TMS displays a pop-up with the following options:

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.



Customer	RoNi...	Card Number	Tax Number 1	Name 1	Birth Date	Postal Code	E-mail	Cty	City	Street
81748395	1	8877323367	44209977K	ESTHER DE LA CINTA GARCIA CABEZA	12.08.1972	41907	esthercabeza@gmail.com	ES	VALENCINA D...	CALLE HUELVA 11
74449901	2			ESTHER GARCIA CABEZA	21.02.1951	11111	NO E-MAIL	ES	ES	

New CRM Profile Ok Back Cancel

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**Thank You**

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