ACCELERATE
MAESTRO USERS CONFERENCE 2025

Track 3 | Front Desk Operations

Session: Merge & Purge

Introduction

Throughout the lifetime of Maestro, the database may accumulate duplicate Client Profiles due to interfaces and inadvertent creation of additional profiles with no stay history or activity. By merging client profiles, the stay history, financial history, and notes of the client profiles are combined under a single client profile number; duplicates will be removed from the database.

The Client Merge needs to be completed, followed by a Client Purge. Prior to the Purge, a backup list of all clients that will be purged is created for reference.

Once a Merge has been completed, please contact Maestro Support to run the Client Purge script.

To run the Client Merge, from the Global Maintenance Main Screen > System > Duplicate Client Merge.

Best Practices for Client Creation

- How to avoid duplicate profile creation
- Client Profiles for Additional Names in Front Desk
- Client Profiles in Spa and Facilities
- Auto Create Group Members - New/Update Option
- Interface profile matching criteria
- Scheduling Client Merge/Purge

Merge Preparation

- Backup
- Names Greater Than Field

Match Criteria Options

- Match Criteria
- Minimum Matches Required
- Neutral Comparison Allowed
- Mismatches Allowed

Merge Options

- Automatic vs Interactive
- Exclude from Merge
- Specify Merge
- Discard All Collected

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Utilizing "To" and "From" Merge Results

- Lower Client Profile code displays on the left
- Higher Client Profile displays on the right
- From → To / To ← From
- Skip Button
- Number of Matched and Merged Profile counts
- What data is merged?

Completing Merge

- Client Merge Reporting

Client Purge

- Client Purge run by Maestro Support