

How to delete duplicate or unused partners?

Purpose

Use this guide when you need to delete an unused partner or remove a duplicate partner in CLOUDEX TMS.

This article explains:

- when a partner can be deleted immediately;
- when partner data must be moved to another duplicate partner before deletion;
- why the replacement partner must have the same VAT code or registration number;
- what to do if no replacement partner is available in the selection list.

If partner is only used as Sender, Consignee or Loading/Delivery company then open partner and press button Delete

If Partner is used as client/customer, carrier/suppliers then **it is possible to delete duplicate partners only if they have the same VAT or Registration numbers.**

Open: Lists → Partners → All partners

Use the search field to search by: partner name; VAT code; registration number; ...

The screenshot shows the CLOUDEX TMS interface. At the top, there is a navigation bar with tabs: 'New', 'Operational work', 'Finances', 'Reports', 'Emails', and 'Lists'. The 'Lists' tab is selected and highlighted with a red box and a red circle with the number 1. Below the navigation bar, there is a sub-menu with 'Clients and Suppliers', 'All partners', and 'Partners'. The 'All partners' option is selected and highlighted with a red box and a red circle with the number 3. The 'Partners' option is also highlighted with a red box and a red circle with the number 2. Below the sub-menu, there is a search bar with the text 'DE1234567890' and a red circle with the number 4. To the right of the search bar, there is a dropdown menu with 'Selected all' and a red circle with the number 5. Below the search bar, there is a table with columns: 'Code', 'Name', 'Registration nu', 'VAT code', and 'Phone'. The table contains two rows of data. The first row is 'Tests GmbH' with registration number '1234567890' and VAT code 'DE1234567890'. The second row is 'Test GmbH' with registration number '23213213' and VAT code 'DE1234567890'. The first row is highlighted with a red box and a red circle with the number 5. The second row is highlighted with a red box and a red circle with the number 5.

	Code	Name	Registration nu	VAT code	Phone
☐		Tests GmbH	1234567890	DE1234567890	
☐		Test GmbH	23213213	DE1234567890	

Open one of 2 duplicate partners (5)

Press **Delete** button

Partner : Tests GmbH

Basic data

Invoices

Sales

Notification settings

Attachment(s)

Statistics

Route price

Other

Name

Tests GmbH

Code

Tests GmbH

Reg No.

1234567890

Client status

Neutral

Carrier status

Neutral

Send invoices

Reminder email

Reminder email

Notes

Notes

Language

English

VAT code

DE1234567890

EORI number

EORI number

Status info

Status info

Client category

Client category

Invoice email

Invoice email

1

Delete

Save

Cancel

If partner is used in some tables then will appear window where you will be able to choose duplicate Partner with the same VAT or registration number

Select the duplicate partner that will receive the data, then click Replace and delete.

Move data before delete



Record "Tests GmbH" can't be deleted because it is used in:

Table name	Record count
Activities	44
Incoming payments	1
Asset Documents	5
Fixed and Intangible Assets	5
Define bills journal	12
Incoming invoice - content	2
Incoming invoices	2
Outgoing invoice - content	1
Outgoing invoices	2

Choose partner with the same Vat or registration number

1

Record "Tests GmbH" data move to: Test GmbH

Test GmbH used in :

Table name	Record count
Outgoing payments	2
Outgoing invoices	1

WARNING! Data replacement can't be turned back!

2

Replace and delete

Cancel

If you can't choose partner to which move data, then first to duplicate Partner enter the same VAT or registration number

After clicking "Replace and delete":

- data from the deleted partner is moved to the selected replacement partner;
- the duplicate partner is deleted;
- historical records remain connected to the correct partner.

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