



Duplicate Customer Search & Merge

IWDS 2.0 TECHNICAL TRAINING DOCUMENTS



Purpose

This document is intended to explain how to perform a duplicate search for a customer pre-record and merge data when appropriate.

Audience

This document is designed to guide both trainers and end users through the process of searching customer pre-records and merging data in the IW DST 2.0 system.



Navigate to Customers

- Log into IWDS 2.0. ([Link](#))
- Select **Pre-Record Intake** tab.
- The Customer Pre-Record Intake Management page is displayed, showing a Search Filter on the left and List View on the right.
- Search and/or select the customer's Last Name.

IWDS 2.0 Site





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Duplicate Customer Search

- After clicking pre-record last name, the user will perform a Duplicate search that will show potential customer matches.
- If potential customers are found, review the data to determine if a true match. To view details, select the **Eye** icon.
- If no match options show in the table, select **Add Customer** to create a new customer record.
- If you discover a customer match, review the details and **Merge** the pre-record with the original customer record.

Last Name	First Name	Preferred Name	Date of Birth	Number of Applications	LWIA	Zip Code	Actions
Adams	Scarlett	N/A	10/02/2008	1	N/A	62701	
Adams	Scarlett	N/A	10/02/1994	0	N/A	62701	

App Date	Program	Sub-Program	Status
WIOA	Trade	Applicant	VI

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Add Customer (If no match)

- If the search does not return the customer with a duplicate, select **Add Customer**.
- Create Customer Profile page will Display.
- Provide the Basic required Customer information to create the Customer record.
- Click **Add Customer** to create the Customer Profile.

Last Name	First Name	Preferred Name	Date of Birth	Number of Applications	LWIA	Zip Code	Preview
Adams	Frank	Frank	12/16/1969	0	N/A	61467	

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Adding a Customer - Account Created

- After adding a customer, a Illinois workNet account will be created.
- A pop-up modal will display the Illinois workNet Account Status.
- New accounts will send an email to the new customer on accessing their Illinois workNet account.
- If an existing account was found, the user can share the username with and the reset password link.
- Click **Continue**

Create Customer Profile

We're setting up a secure space just for you. By sharing a few details, you'll create a profile that helps us save your progress. Your personal details are confidential and only used to match you with the right programs and support.

To best support your participation, please let us know if you need any accommodations or assistance.

First Name*
Connor

Middle Initial
K

Last Name*
Brown

Preferred Name
Preferred Name

Zip Code*
61467

Email Address*
connorbo@fakeemail.com

Phone Number
(999) 999-9999

Does your phone receive text messages?
Yes

The next questions ask about you and your background. Your answers help us find the right workforce programs for you and determine if you might be eligible for our services. Information like your birthday and sex helps us make sure our programs serve everyone fairly. We keep all your answers safe and private.

Date of Birth*
02/28/2001

Do you identify as a person of Hispanic or Latino ethnicity?*
No

Which race(s) do you identify with? Select all that apply.*
White

What sex were you assigned at birth?*
Male

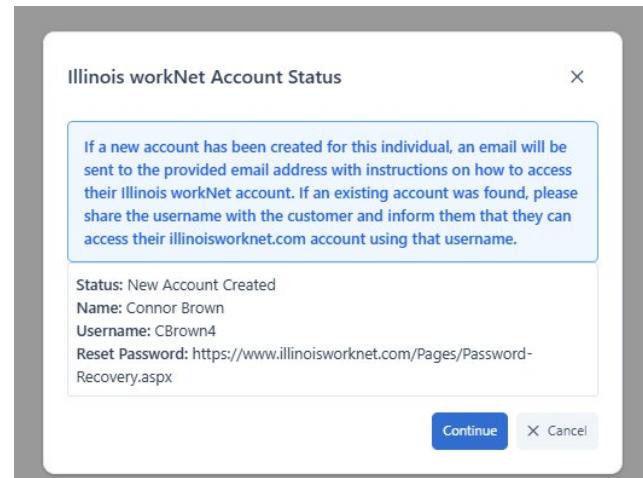
Would you mind telling us your sexual orientation?*
Prefer Not to Answer

Would you care to share any disability status you have? This question is asked for reporting purposes.*
Prefer Not to Answer

Are you a veteran?*
No

+ Add Customer

The Illinois workNet Center System, an American Job Center, is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment by calling TTY (800) 526-0844 or 711. This workforce product was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration.



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www.illinoisworknet.com