

## COMBINING CUSTOMERS

1. Find the duplicate customer using the customer search.
2. Click on the edit button for the customer that you want to keep.

### Customer Search

Customer Search

Export Search \* Search Clear X

Phone:  Email:  Postal Code:   
Name:  Address: 18322 City:   
ID:  Territory:

	Name	Phone	Email	ID	Type	Address	City	Zip	Active
2	Jones, [redacted]	(216) 531-1111	[redacted]@aol.com	C2789	Primary	18322 Win Road	Cleveland	44119	<input checked="" type="checkbox"/>
	Jones, [redacted]	(216) 905-1111	[redacted]	C7206	Primary	18322 Win Road	Cleveland	44119	<input checked="" type="checkbox"/>

Search X 1 - 2 displayed, 2 in total

3. Under "Quick Actions" in the customer record, select "Combine Customer."

Print/Email Quick Actions Save All X

Communications

New Work Order  
Combine Customer

	Communication Type	Communication Info	Comments/Description	Active
	Cell Phone ★	(216) 5 [redacted]		<input checked="" type="checkbox"/>
	Email ★	[redacted]v@aol.com		<input checked="" type="checkbox"/>

Search X 1 - 2 displayed, 2 in total

4. In the Combine Customer screen, search for the duplicate customer.
5. Click on the blue "Link" button to select the duplicate customer.

### Combine Customer

Combine Customer

Help Search Clear

Search for and select duplicate customer to combine.

Phone:  Name:  Address: 18322 Postal Code:

Options	Name	Type	Phone	Address	City	Zip	Active
5	Jones, [redacted]	Primary	(216) [redacted]	18322 Win Road	Cleveland	44119	<input checked="" type="checkbox"/>

Search 1 - 1 displayed, 1 in total

- Click on the "Combine" button to combine the customer.

Combine Customer

**Combine Customer** [X]

**Name:** Jones, [ ]

**Address:** 18322 Windward Road

[ ]

**City:** Cleveland

**Phone:** (216) [ ]

**Active:**

**Combine** 6

- The Combine function adds the duplicate customer's address as a Location to the customer that you chose to keep. The jobs and equipment from the duplicate customer are also added.
- To remove the Location address and just keep the Primary address, click on the Options button in the Address Panel and click on Combine Address.

Addresses [Options] [Eye]

Address Type	Name	Address	Address 2	City	State	Code	Active
Primary	Home Address	18322 Windward Road		Cleveland	Ohio	44119	<input checked="" type="checkbox"/>
Location	Location	18322 Windward Road		Cleveland	Ohio	44119	<input checked="" type="checkbox"/>

Search [X] 1 - 2 displayed , 2 in total

8 Combine Address

- Select the Source address and the Destination address and click the Combine button.

Addresses [Combine] [Cancel] [Eye]

**Source Address:** Location - 18322 Windward Road

**Destination Address:** Home Address - 18322 Windward Road

9