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

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

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

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

7. 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.

8. 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.

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