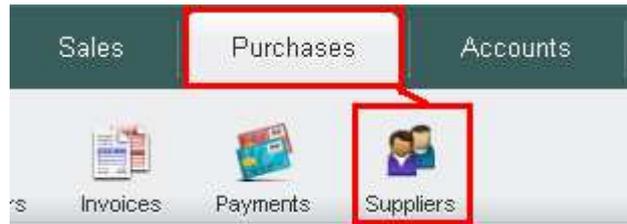


How to Merge Suppliers on SortMyBooks Online.

1. Click on Purchases, then Suppliers.



2. Click on the Supplier that you want to change the records of – In this case we are selecting “Test Supplier 1” – This will open up their details.

Name	Payee	Total Due	Email	Telephone	Last Purchase	Total Purchases
Test Supplier 1	Supplier	0.00			0.00	0.00
Test Supplier 2	Supplier	0.00			0.00	0.00
Test Supplier 3	Supplier	0.00			0.00	0.00
Test Supplier 4	Supplier	0.00			0.00	0.00

3. Click on the Merge tab at the top.

Quick Edit Details Financial **Merge** Opening Balance Delete

Editing Suppliers
Use this section to edit the details of Suppliers, Employees and Other Payees already setup on the system.

Name: * Country: * Email: Telephone:

Test Supplier 1 Ireland

OK Cancel

4. This will give you a drop-down list populated by the other Supplier names. Select the Supplier you want to Merge Supplier 1 **WITH** – In this case we are merging Test Supplier 1's records with Test Supplier 2. Click OK.

Quick Edit Details Financial **Merge** Opening Balance Delete

Merge "Test Supplier 1" with

Merging Supplier: Test Supplier 2
Test Supplier 2
Test Supplier 3
Test Supplier 4

OK Cancel

5. This message will appear in the top right corner once it is done.

Supplier Merged Successfully.

Note: Merging will not delete any Supplier, if you need to delete a Supplier after it is merged then see the How-To in the Help Documents section.