

How to Merge Customers on SortMyBooks Online.

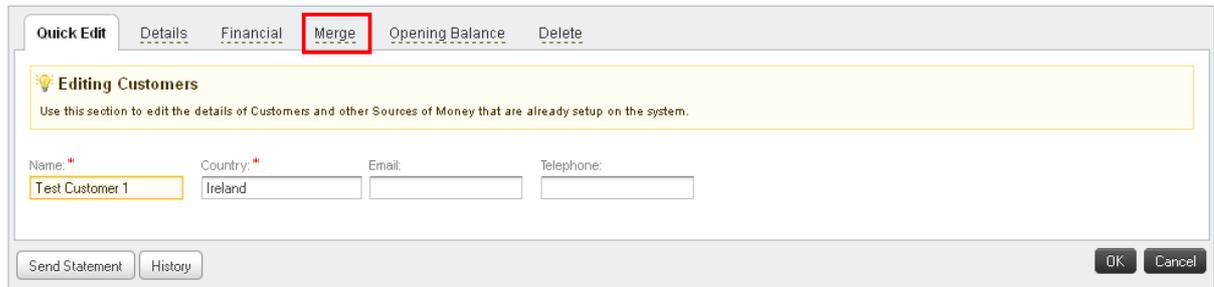
1. Click on Sales, then Customers.



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

Name	Type	Total Due	Email	Telephone	Last Sale	Total Sales
Test Customer 1	Customer	0.00			1.23	1.23
Test Customer 2	Customer	0.00			2,460.00	2,460.00
Test Customer 3	Customer	0.00			0.00	0.00
Test Customer 4	Customer	0.00			0.00	0.00

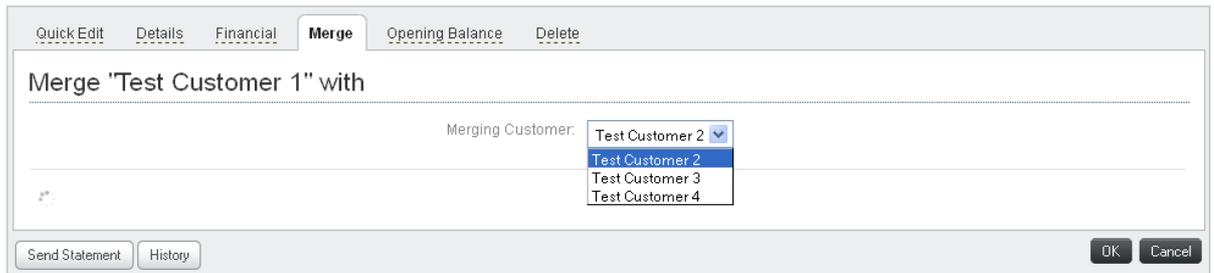
3. Click on the Merge tab at the top.



Editing Customers
Use this section to edit the details of Customers and other Sources of Money that are already setup on the system.

Name: * Country: * Email: Telephone:

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



Merge "Test Customer 1" with

Merging Customer:

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

Customer Merged Successfully.

Note: Merging will not delete any Customers; if you need to delete a Customer after it is merged see this How-To in the Help Documents section.