# 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.
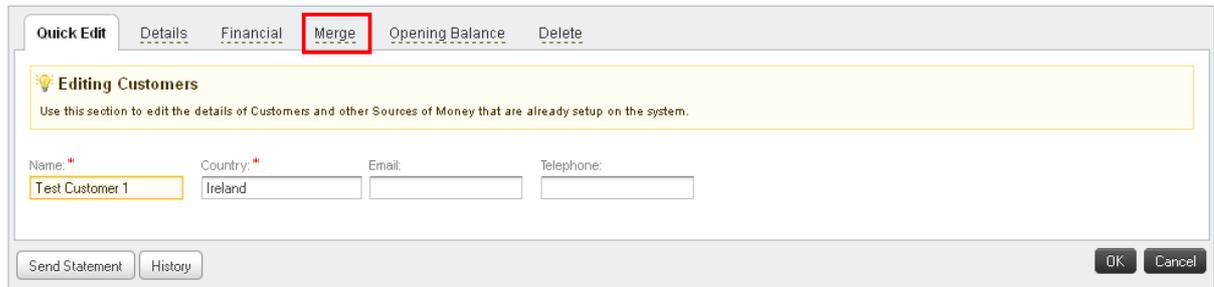


4. This will give you a drop-down list populated by the other Customer names. Select the Customer you want to Merge Customer 1 **WITH** – In this case we are merging Test Customer 1's records with Test Customer 2. Click OK.
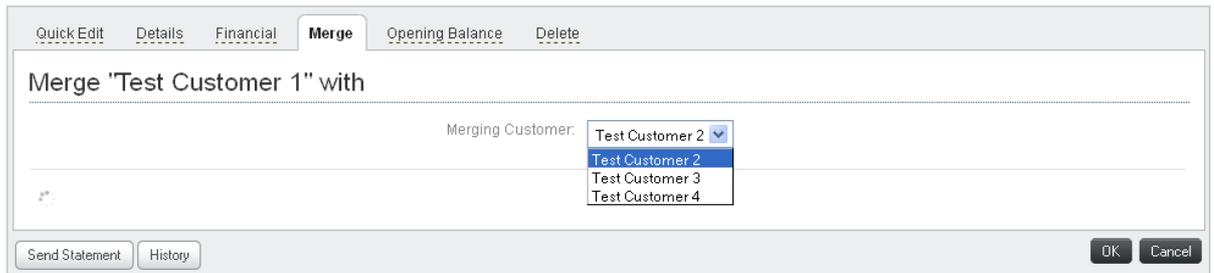


5. This message will appear in the top right corner once it is done.



   **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.