

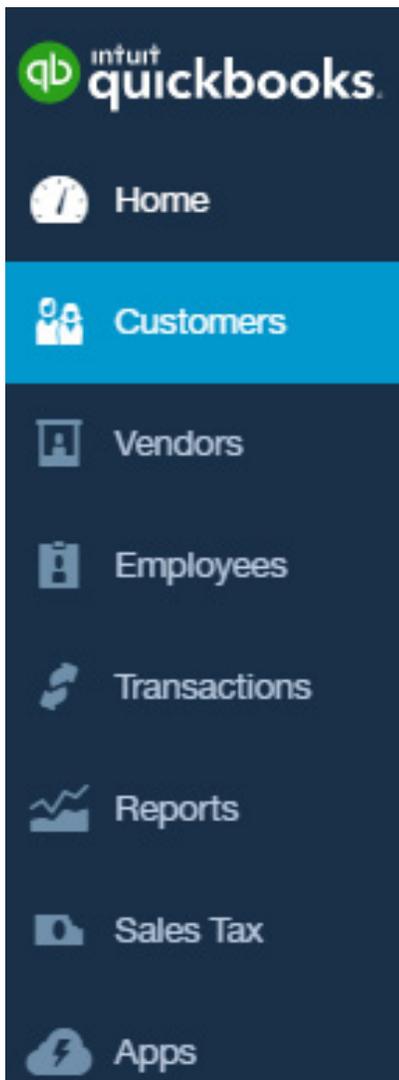
HOW TO MERGE (COMBINE) ENTRIES ON A LIST

You'll probably come across this real-world scenario. Someone accidentally enters the same "thing" (name, account, etc.) on a list by accident. This often happens because they misspell the entry. Now you have a problem. The list contains duplicate entries for the same thing.

In this example, we had a customer named "Calvin Baker" but someone else entered an invoice to "Cal Baker". They should have used Calvin Baker. Note: If the wrong name was only used on 1 transaction, you could edit the transaction (invoice in this case) and change the name. But what if there are 100's of transactions associated with the "wrong" name? Merging solves this problem.

In this example, we want to merge "Cal Baker" and all the associated transactions with Calvin Baker. Let's merge these 2 names (note: this technique works on other lists too).

1. Click the [Customers](#) tab.



- Since there are two individual customer records for the same customer you'll need to merge them. On the Customers list click the name that you are going to merge (i.e. the one you're removing), in this case, [Calvin Baker](#).

Customers New customer ▾

Unbilled Last 365 Days Unpaid Last 365 Days Paid

\$0 0 ESTIMATE	\$750 3 UNBILLED ACTIVITY	\$5,930 22 OPEN INVOICES	\$1,940 11 OVERDUE	\$3,136 12 PAID LAST 30 DAYS
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Batch actions ▾ Find a customer or company 🔍

<input type="checkbox"/>	CUSTOMER ▲ / COMPANY	PHONE	OPEN BALANCE	ACTION
<input type="checkbox"/>	Amy's Bird Sanctuary ✉ Amy's Bird Sanctuary	(650) 555-3311	\$239.00	Receive payment ▾
<input type="checkbox"/>	Bill's Windsurf Shop ✉ Bill's Windsurf Shop	(415) 444-6538	\$85.00	Receive payment ▾
<input type="checkbox"/>	Cal Baker Cal Baker	(415) 555-8863	\$233.28	Receive payment ▾
<input type="checkbox"/>	Calvin Baker Calvin Baker	(415) 555-8863	\$414.72	Receive payment ▾

- To make sure our fix works, note that Calvin Baker owes us \$414.72 for this invoice number 1032. When we've completed merging, this invoice should be under Cal Baker.

Calvin Baker [Edit](#) New transaction ▾

Calvin Baker
[Add notes](#)

\$414.72
OPEN

\$414.72
OVERDUE

Transaction List Customer Details

Batch actions ▾ Filter ▾

<input type="checkbox"/>	DATE ▾	TYPE	NO.	DUE DATE	BALANCE	TOTAL	STATUS	ACTION
<input type="checkbox"/>	08/21/2016	Invoice	1039	09/20/2016	\$414.72	\$414.72	Open	Receive payment ▾

- Click [Edit](#).
- In the [Display name as](#) field enter the name you are merging this customer's record with, [Cal Baker](#).

Customer Information ✕

Title	First name	Middle name	Last name	Suffix	Email		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Separate multiple emails with commas"/>		
Company					Phone	Mobile	Fax
<input type="text" value="Cal Baker"/>					<input type="text" value="(415) 555-8863"/>	<input type="text"/>	<input type="text"/>
*Display name as					Other	Website	
<input type="text" value="Cal Baker"/>					<input type="text"/>	<input type="text"/>	
Print on check as <input checked="" type="checkbox"/> Use display name					<input type="checkbox"/> Is sub-customer		
<input type="text" value="Cal Baker"/>					<input type="text" value="Enter parent customer"/> <input type="text" value="Bill with parent"/>		

- Click [Save](#).
- Click Yes when asked to confirm that you are merging the two customer records.

Please Confirm

That name is already being used. Would you like to merge the two?

No

Yes

- Click on the entry you merged the other one into. Here is invoice number 1032 for \$414.72.

Cal Baker [↗](#)

Cal Baker

[Add notes](#)

Edit
New transaction ▼

\$648.00
OPEN

\$414.72
OVERDUE

Transaction List
Customer Details

Batch actions ▼
Filter ▼

🖨️
📄
⚙️

<input type="checkbox"/>	DATE ▼	TYPE	NO.	DUE DATE	BALANCE	TOTAL	STATUS	ACTION
<input type="checkbox"/>	09/19/2016	Invoice	1038	10/19/2016	\$233.28	\$233.28	Open	Receive payment ▼
<input type="checkbox"/>	08/21/2016	Invoice	1039	09/20/2016	\$414.72	\$414.72	Open	Receive payment ▼