Merging Customers

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Purpose

The purpose of the merge customer function is to consolidate the information from 2 customers into 1.

A lead cannot be merged with a customer and visa versa.

What happens when customers are merged?

The customer to be merged will be called the '**Source**' and the customer to Merge Into will be called the '**Target**'.

- **Contacts**, **Activities**, **Addresses** and **Attachments** will be moved from the Source to the Target.
- **Quotes**, **Sales Orders**, **Ship Docs** and **Customer Returns** will be moved from the Source to the Target.
- **Addresses** are consolidated where possible.
- **The Source** is deleted.
- **Make sure** to copy email addresses, phone numbers and important information to a notepad before performing a merge. Especially if you want to save any info from the **Target**. This way if you make a mistake you can quickly re-enter this information within the Customer Editor.
- **Irreversible Action**: **THERE IS NO UNMERGE FUNCTION**. Once Customers are merged, **THIS IS A PERMANENT CHANGE** and cannot be undone.

Order Time cannot merge customers using Accounting Integration therefore you should repeat the merge function for the Source and Target within your accounting system.

Usage

- Find the Source (the customer you want to remove).
- Click Merge
- Select the Target (the customer to merge INTO)
- Click Save

Error

- Sometimes when merging customers that do not have the same name there will be an error that reads this is a duplicate. Usually this is due to the Shipping Addresses for the customer having the same names. Slightly alter the Address names on one of the customers to resolve this issue.