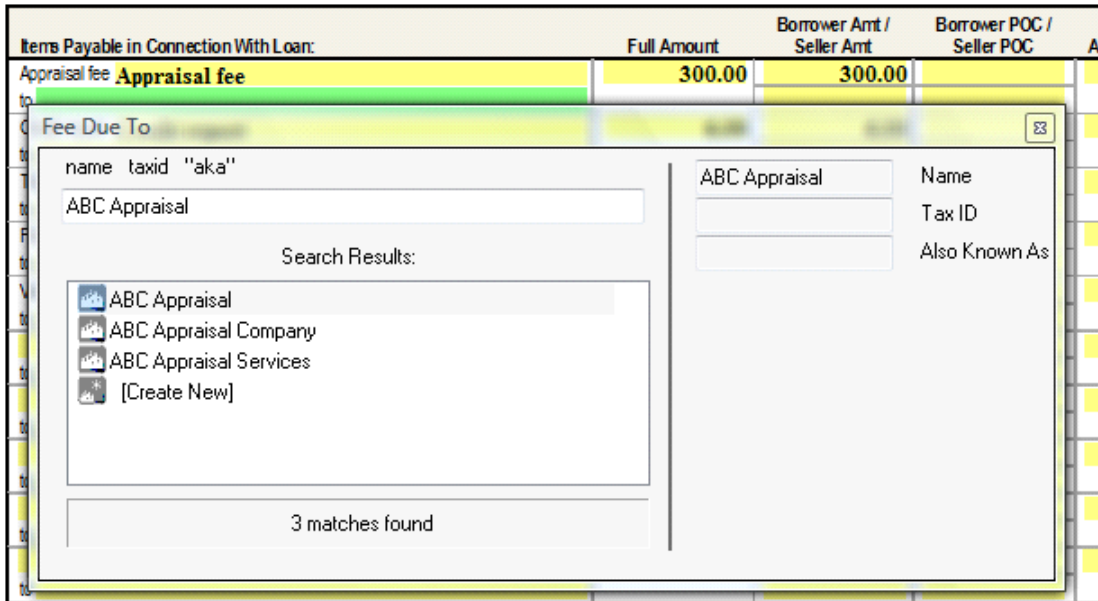


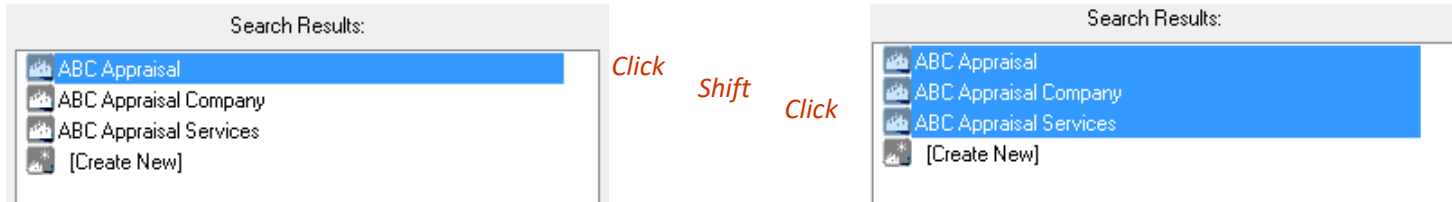
Merging Duplicate Companies/Individuals

If when searching for an existing company, the list of possible matches contains more than one company with the same or similar name, the redundant records can be merged into one.



In this example three of the same company were mistakenly created, so we will merge them all into one. Before you can begin the merge process the items to be merged must be highlighted within the search box.

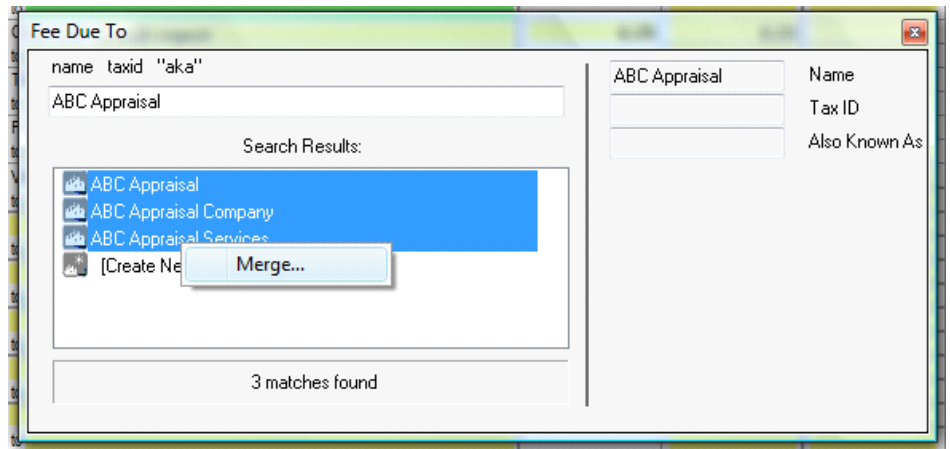
If the items are side-by-side you can *Click* on the first item to be highlighted, and then hold down the *Shift* key and *Click* the last item to be highlighted.



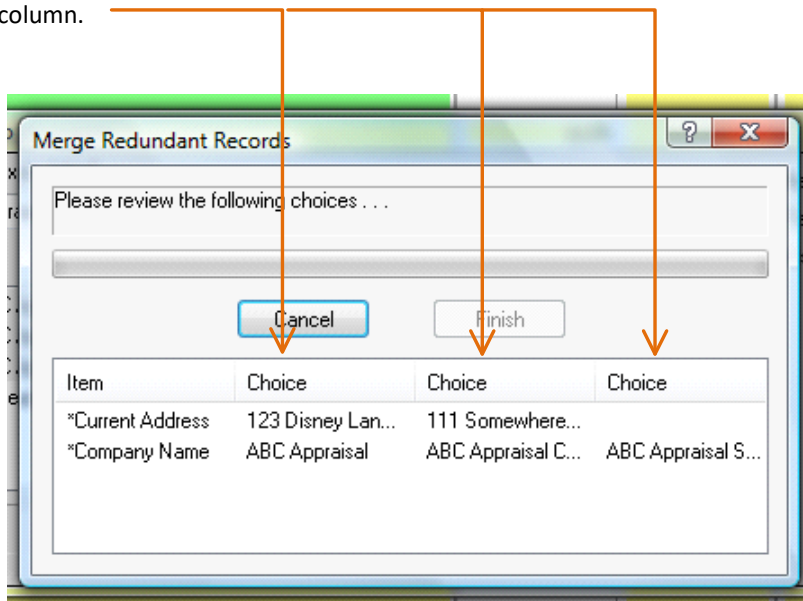
If the items that you wish to highlight are not side-by-side in the search list, you can *Click* on one item within the list and then hold down the *Ctrl* key and *Click* on the next item to be highlighted.



Once the items to be merged have been highlighted, **Right-Click** on any highlighted item, and select **Merge**.



The **Merge Redundant Records** dialog will load displaying each of the items that were highlighted in a **Choice** column.

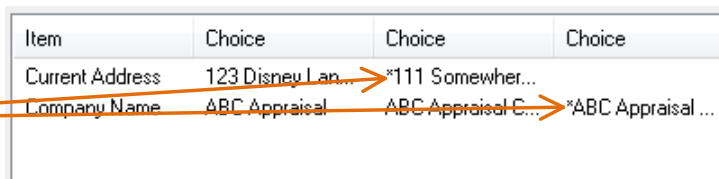


The first column titled *Item* is a description of each row. In this example the Current Address for the first highlighted company "ABC Appraisal" is different than the address for the second highlighted company "ABC Appraisal Company", and the third highlighted company "ABC Appraisal Services" has no address.

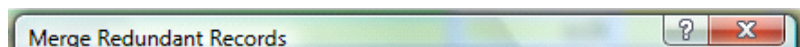
At this point you may decide that although the first two companies have similar names, they are actually two separate companies, or two locations for the same company, in either case you may not want to merge these two companies. If so, **Cancel** the merge process and search again for the company name. This time highlighting only the companies that you wish to merge.

If, after reviewing the choices for each item, you determine that you want to continue with the merge process, you must **Click** to select which address and company name should be associated with the one company that will remain after the merge process is complete.

Notice that this causes an asterisk ("*") to appear in front of the selected choice.



Once a choice has been



Once a choice has been made within each item row, **Click** on the "Finish" button to merge the three records into one.

