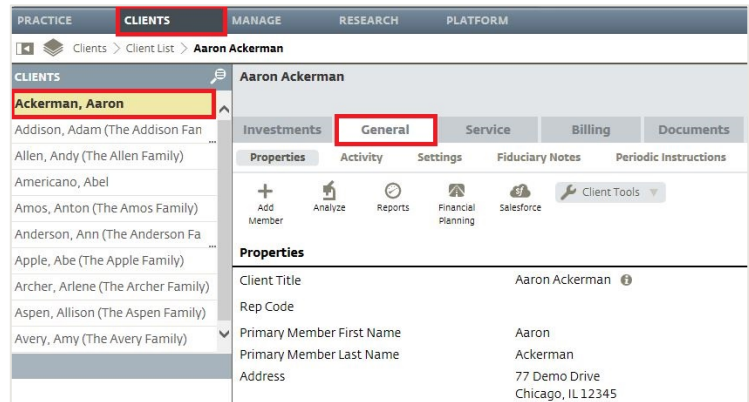


Merge Clients

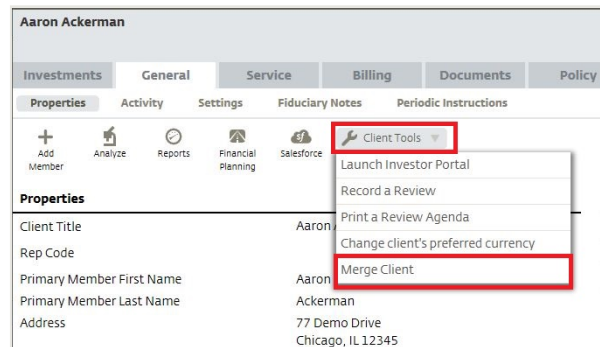
1

From the Client Page

- Click the **General Tab**.



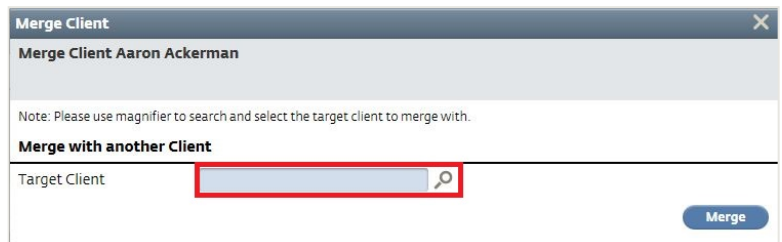
- Click on **Client Tools (Wrench Icon)**
- Select **Merge Client** from the dropdown menu.



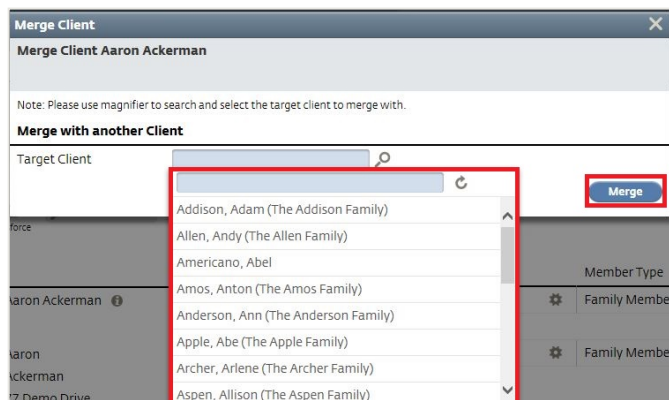
2

Select the Client

- Enter the name of the client you would like to merge with, and click the **Magnifying Glass** icon.



- Click the **Merge** button.



Merge Clients

3

Confirm the Merge

- After selecting the client you would like to merge with, click the **Continue** button to confirm.

Note*** Please be sure to take note of the disclosures before merging the clients.

Confirmation

Merging these client profiles may cause some of the profile details for Aaron Ackerman to be permanently removed from the system. Please confirm that you would like to merge the profiles (this operation can not be undone once confirmed).

Current customer will be merged to following customer
The Addison Family. *Primary Owner:* The Addison Family
77 Demo Drive Chicago, IL 12345

Accounts: DEMO-1204460, DEMO-1204458, DEMO-1204459

Current customer accounts: DEMO-1204485, DEMO-1204487, DEMO-1204489, DEMO-5554250, DEMO-1204496, DEMO-1204495, DEMO-1204497, DEMO-1204498, DEMO-1204499

Continue

Merge Clients

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