

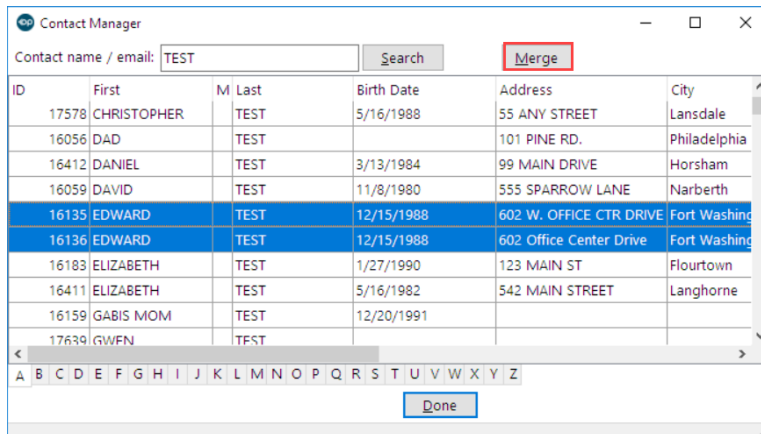
Merging Contacts

Last Modified on 03/23/2023 8:41 am EDT

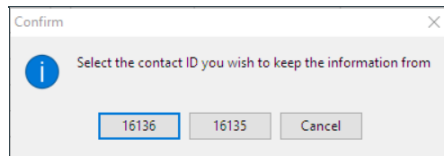
Version 20.18

Path: Practice Management tab > Contact Manager button

1. Navigate to the Contact Manager by following the path above.
2. Select the two entries for the contact you need to **Merge** by holding Shift or Ctrl on your keyboard and clicking the two entries. The **Merge** button will appear grayed out until 2 entries have been selected.
3. Click the **Merge** button.



4. Select the **Contact ID** for the contact you want to keep.

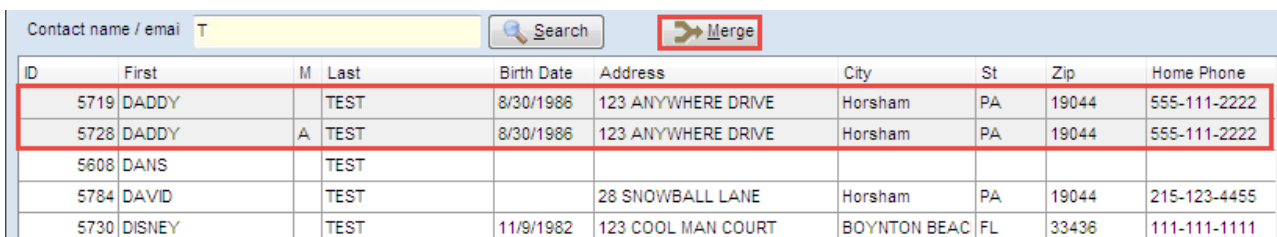


5. When complete, the Merge completed dialog displays, click **OK**.
6. Click the **Done** button to close the window.

Version 20.17

Path: Practice Management tab > Contact Manager button

1. Navigate to the Contact Manager by following the path above.
2. Select the two entries for the contact you need to **Merge** by holding Shift or Ctrl on your keyboard and clicking the two entries. **Note:** The **Merge** button will appear grayed out until 2 entries have been selected.
3. Click **Merge**.



ID	First	M	Last	Birth Date	Address	City	St	Zip	Home Phone
5719	DADDY		TEST	8/30/1986	123 ANYWHERE DRIVE	Horsham	PA	19044	555-111-2222
5728	DADDY	A	TEST	8/30/1986	123 ANYWHERE DRIVE	Horsham	PA	19044	555-111-2222
5608	DANS		TEST						
5784	DAVID		TEST		28 SNOWBALL LANE	Horsham	PA	19044	215-123-4455
5730	DISNEY		TEST	11/9/1982	123 COOL MAN COURT	BOYNTON BEAC	FL	33436	111-111-1111



Note: Read the **Confirm** dialog box and decide which Contact entry you want to keep.

