

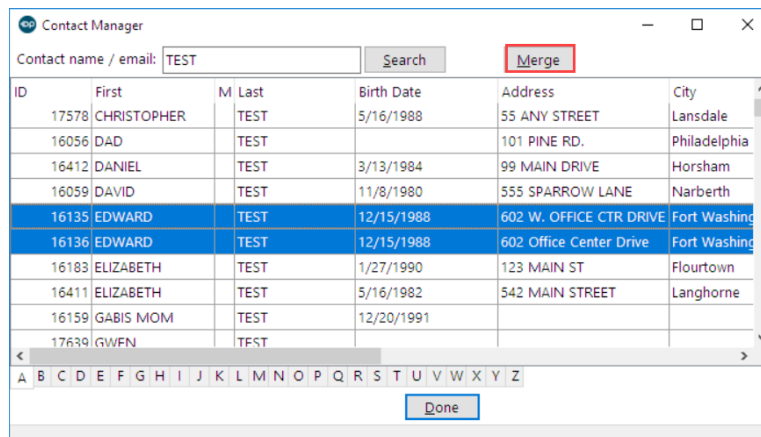
Merging Contacts

Last Modified on 10/09/2024 4:29 pm 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.



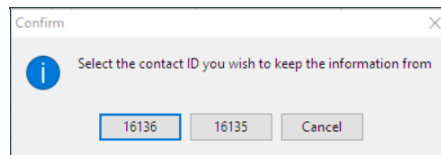
Contact Manager

Contact name / email: TEST Search Merge

ID	First	M	Last	Birth Date	Address	City
17578	CHRISTOPHER		TEST	5/16/1988	55 ANY STREET	Lansdale
16056	DAD		TEST		101 PINE RD.	Philadelphia
16412	DANIEL		TEST	3/13/1984	99 MAIN DRIVE	Horsham
16059	DAVID		TEST	11/8/1980	555 SPARROW LANE	Narberth
16135	EDWARD		TEST	12/15/1988	602 W. OFFICE CTR DRIVE	Fort Washing
16136	EDWARD		TEST	12/15/1988	602 Office Center Drive	Fort Washing
16183	ELIZABETH		TEST	1/27/1990	123 MAIN ST	Flourtown
16411	ELIZABETH		TEST	5/16/1982	542 MAIN STREET	Langhorne
16159	GABIS MOM		TEST	12/20/1991		
17639	GWFN		TEST			

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Done

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



Confirm

Select the contact ID you wish to keep the information from

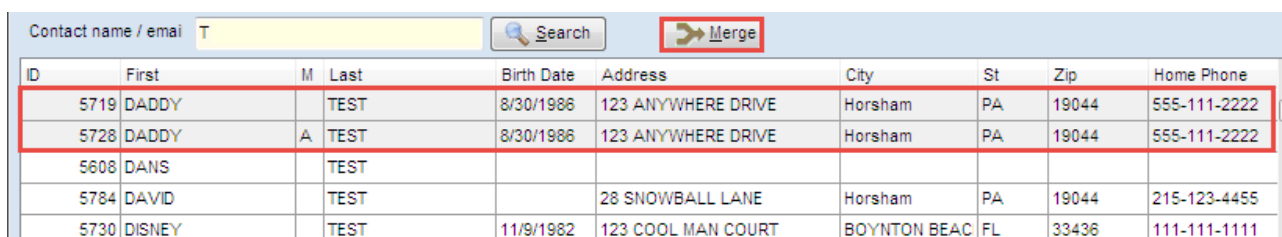
16136 16135 Cancel

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**.



Contact name / email T Search 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.

