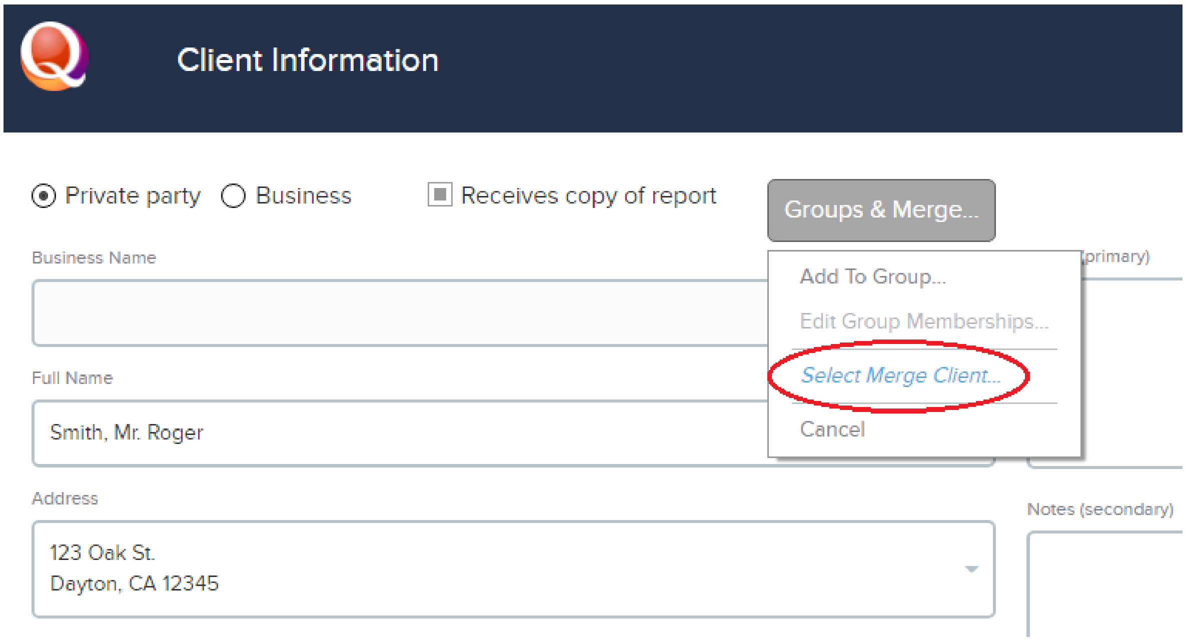
Merge Clients

It is not uncommon for a client record to be accidentally entered more than once especially when there are multiple appraisers working in the same database. Merging client records is straightforward. Just open the client record into which you wish to merge all of the data. Once there, click on the "Groups & Merge…" button and then on the "Select Merge Client…" menu item.



In the Select dialog, type the name for the client record that you want to merge into the current record. From the resulting list, select the record to merge.