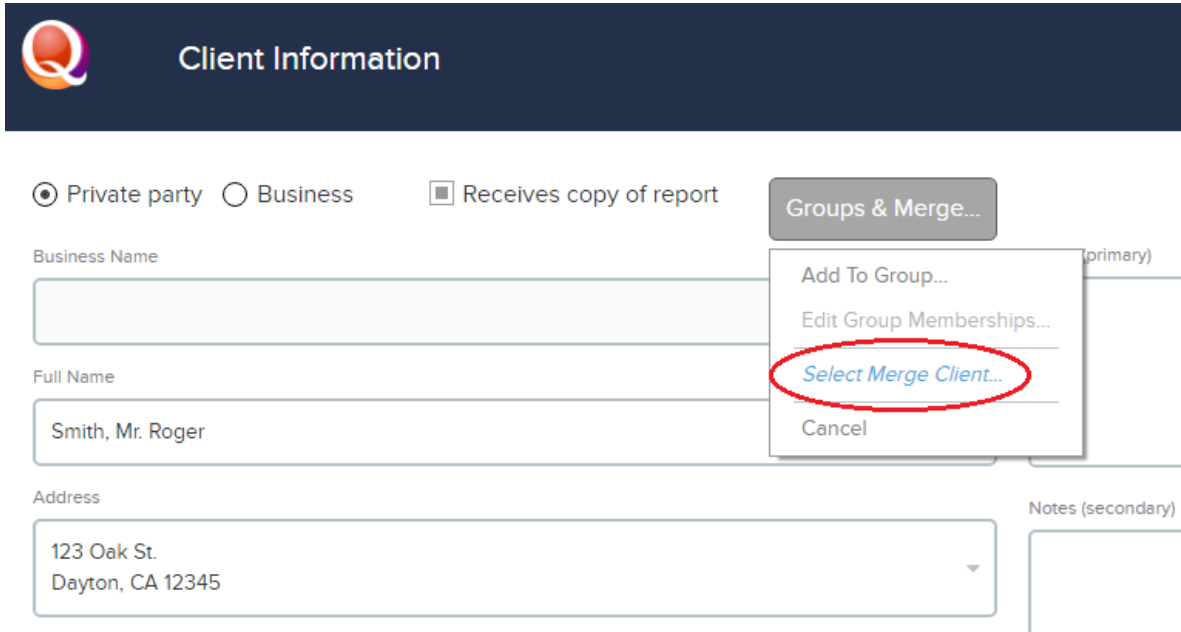


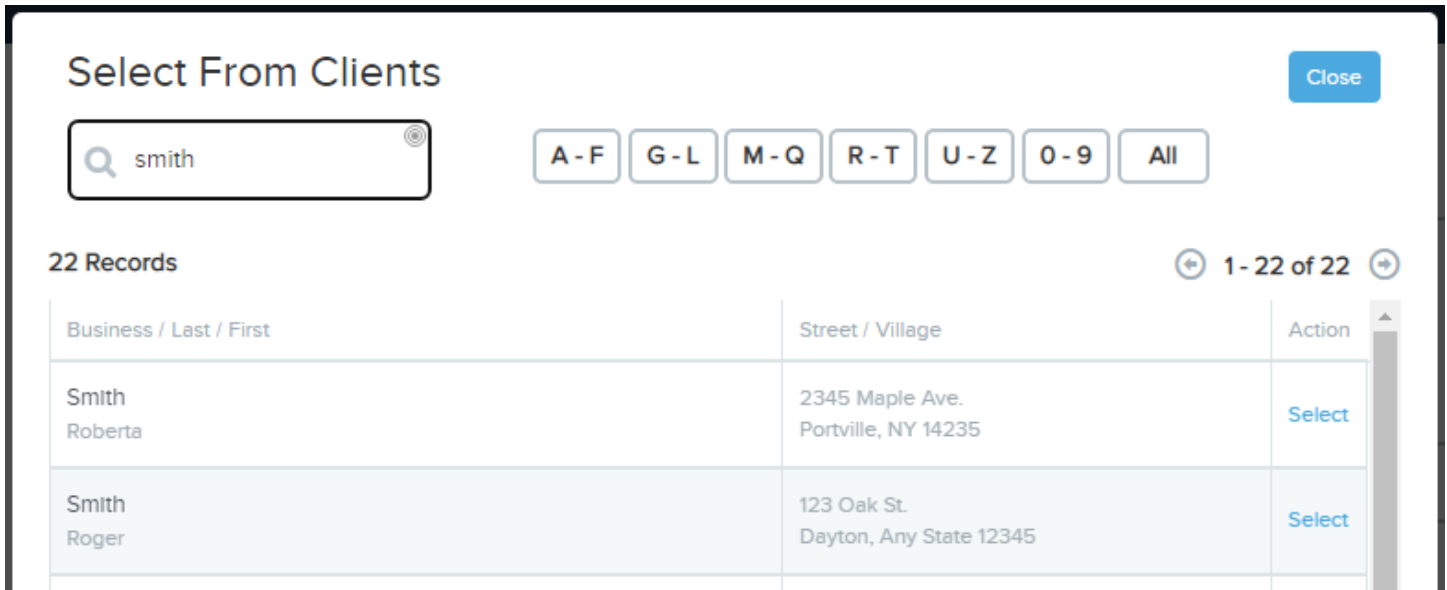
Merge Clients

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.



The screenshot shows the 'Client Information' form. At the top left is a logo. Below it are radio buttons for 'Private party' (selected) and 'Business', and a checkbox for 'Receives copy of report'. A 'Groups & Merge...' button is on the right. Below are input fields for 'Business Name', 'Full Name' (containing 'Smith, Mr. Roger'), and 'Address' (containing '123 Oak St. Dayton, CA 12345'). A 'Notes (secondary)' field is on the right. The 'Groups & Merge...' dropdown menu is open, showing options: 'Add To Group...', 'Edit Group Memberships...', 'Select Merge Client...' (circled in red), and 'Cancel'.

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.



The 'Select From Clients' dialog box has a search bar with 'smith' entered. Below the search bar are filter buttons: 'A - F', 'G - L', 'M - Q', 'R - T', 'U - Z', '0 - 9', and 'All'. It shows '22 Records' and a pagination indicator '1 - 22 of 22'. A table lists the results:

Business / Last / First	Street / Village	Action
Smith Roberta	2345 Maple Ave. Portville, NY 14235	Select
Smith Roger	123 Oak St. Dayton, Any State 12345	Select