

How to Merge Duplicate Customer Accounts

1. Select 'merge duplicate customer' (or patient/client) button at the top of the customer table.
2. In the first field start typing the name of the customer account you want to keep (name, email, phone numbers).

Merge Duplicate Patient

Merge patients instructions: ?

Patient name to keep:

Layla Arnold (ID: 3)

Patient to Keep - Contact Info:
Email: client@gmail.com
Phone Number:
Cell Number: 9053176729

Patient name to merge:

Search Customer Name


Cancel Reset Form Merge Patient


It is often helpful to note the ID's of the customers you want to merge, especially when the customers have the same names.

<input type="checkbox"/>	Wylie ID	First Name	Last Name
<input type="checkbox"/>	5	Layla	Abella
<input type="checkbox"/>	3	Layla	Arnold

3. In the next field type the name of the customer you want to merge. You will

lose the name, email, and phone number on this account, while the rest of the information will be merged.

Merge Duplicate Patient 

Merge patients instructions: 


Patient name to keep:


Patient to Keep - Contact Info:
Email: client@gmail.com
Phone Number:
Cell Number: 9053176729

Patient name to merge:

Patient to Merge - Contact Info: (This data will be lost)
Email: client@gmail.com
Phone Number:
Cell Number: 222-222-2222

4. Lately, select 'Merge Customer' (or patient/Client)

Merge Duplicate Patient 

Merge patients instructions: 

Patient name to keep:

Patient to Keep - Contact Info:
Email: client@gmail.com
Phone Number:
Cell Number: 9053176729

Patient name to merge:

Patient to Merge - Contact Info: (This data will be lost)
Email: client@gmail.com
Phone Number:
Cell Number: 222-222-2222

Online URL: <https://help.wyliebiz.com/article.php?id=92>