
Application	ChreosClient – Chreos 3
Module	Clients
Access	“Client Management Client ”
Minimum service pack	SP32
This document	Merging Clients Ref 3.25 Release 1 Published February 2003

Overview

The ability to merge the data of two clients together is available in Chreos through “Client management”. This can be used in a variety of ways and should only be used by someone who has a full understanding of the process and outcomes involved. **A back up must be completed before merging clients.**

What to Use the Merge Functionality For

Option 1: To Combine Clients

If a client has been set up in “Client management” multiple times by accident and both versions have been actively used and have transactions associated with them, one version can be merged into the other. The contact details for the client will be correct (as long as both were originally set up correctly), and the transactions will be combined.

Option 2: To ‘Delete’ Clients

It is not possible to completely delete clients from Chreos because historical records and documentation have to be kept. However a ‘Deleted Clients’ client can be set up that can contain the records and documents of all clients that are no longer actively used. When this is done individual client information is not kept, for example, contacts, profiles, notes and subscriptions. However all transactions are kept such as orders, packing slips and invoices. If you are merging a client with no transactions then the merge will leave no trace of them, they will effectively be deleted.

To set up a ‘Deleted client’ client select the menu option “Clients | Client Management” and click the [Add] button. Enter the ‘Client code’, ‘Name’ and ‘Sort code’ and tick the ‘Charge account’ checkbox. Assign the client the required accounting method. The other details on this page are not necessary.

Note: When merging two clients they must be assigned the same accounting method, for example either open item or balance forward. If you have some clients that are open item and some that are balance forward you will need to set up a 'Deleted Clients' for each. This is outlined further in 'To Merge Two Clients' in this information sheet.

Things to Note Before Merging Clients

- A backup **must** be completed before merging clients.
- Any clients that are merged must be assigned the same accounting method. A merge will not be completed if one client has been assigned as open item and the other as balance forward.

To Merge two Clients

- Make a backup. Refer to “Backup Data (53.2)”.
- Select the menu option “Clients | Client management”.
- Select the client that is to be merged into another client. This is the client that is no longer required.
- Click the [Merge] button and the “Merge clients” screen will appear. The following details will be displayed about each client:
 - **Client code** – The unique identifier of the client.
 - **Name** – The name of the client.
 - **Information** - This will say either 'Must merge with 'open item' client' or 'Must merge with 'balance forward' client'.
 - **Client to transfer transactions too** – This grid will display all of the clients that the transactions can be merged with ie all of the clients assigned the same accounting method.
 - **Client code & sort code.** To select a client refer to “Client search (1.3)”.
- When using Option 1 select the client that is to now store the historical record of the client originally selected.
- If you are using Option 2 select the client that has been set up as the deleted client from the grid. This could be called something like 'Deleted Clients – Open Item' or 'Deleted Clients – Balance Forward'.
- Click the [Merge] button.
- A confirmation message will ask 'Are you sure you really want to remove this client? Do you have a recent back up you can restore to if problems occur?' If the answer is yes to both questions click the [Yes] button.
- Once the merge is complete the “Merge clients” screen will disappear.

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