Consolidate clients

Go to file, copy, clone client to create new consolidated client. With new client open go to setup, system, multi-client consolidation. Select the clients to consolidate on the right side of the screen. When you finish click OK, and CLOSE. Re-open the consolidate program. Make sure the clients are in the list on the left side of the screen. Click RUN CONSOLIDATION. When it finishes it you can use the consolidate client as normal with all the combined data.

Help and Support

Help Desk

Homepage

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