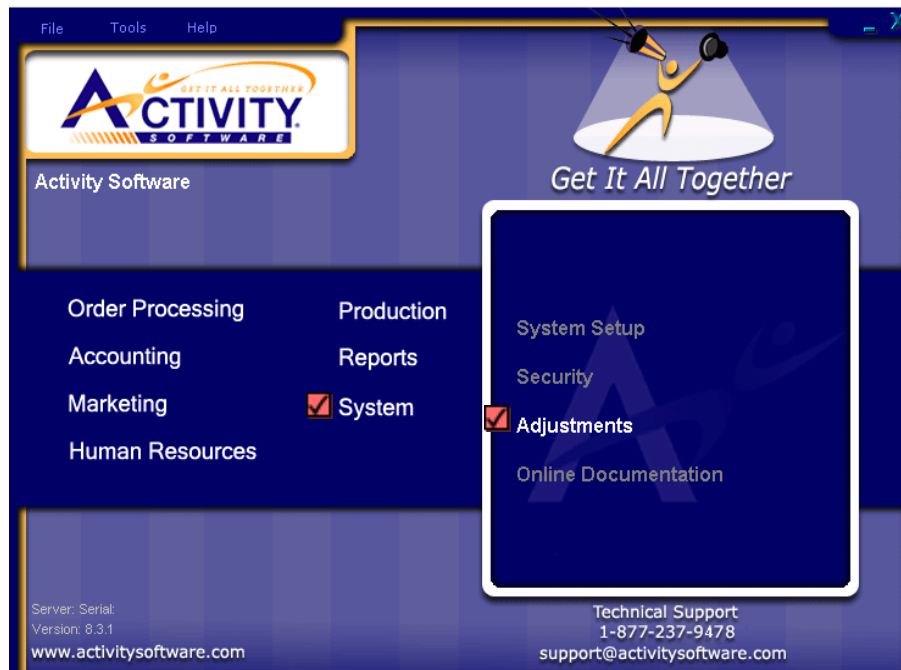


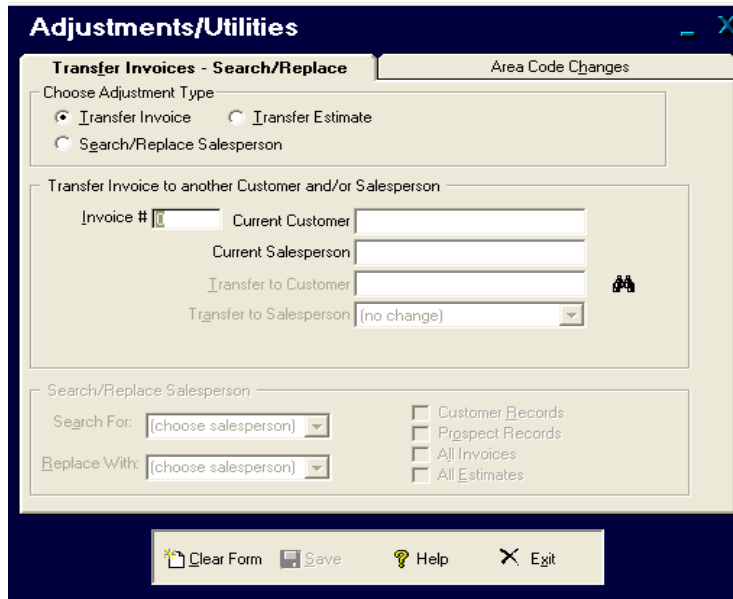
To Merge One Customer's Invoices and Estimates with another Customer

If the customer has more than a few estimates and invoices, please contact Activity Software with exact details of what you want to do and you will be provided with a SQL statement to make the changes you need.

- ✚ Open **ADVANTAGE**.
- ✚ Click on **System** then **Adjustments**:



✚ You can then select what you want to transfer from where and how:



The screenshot shows a software window titled "Adjustments/Utilities" with a sub-tab "Transfer Invoices - Search/Replace". The window contains the following elements:

- Choose Adjustment Type:** Radio buttons for "Transfer Invoice" (selected), "Transfer Estimate", and "Search/Replace Salesperson".
- Transfer Invoice to another Customer and/or Salesperson:** Fields for "Invoice #", "Current Customer", "Current Salesperson", "Transfer to Customer" (with a dropdown arrow), and "Transfer to Salesperson" (with a dropdown menu showing "(no change)").
- Search/Replace Salesperson:** Fields for "Search For:" and "Replace With:", both with dropdown menus showing "(choose salesperson)".
- Checkboxes:** "Customer Records", "Prospect Records", "All Invoices", and "All Estimates".
- Buttons:** "Clear Form", "Save", "Help", and "Exit" at the bottom.

If you are moving all of a customer's invoices to another customer, you can delete the customer if you no longer need it if you are sure you have all of the information you may want in the future.