Merge Prospects

To combine 2 or more records for a customer:

1. Type in all or part of the name in the quick search in the upper left of eLead.

```
Cust. ▼ stewart
```

2. Click beside one of the records.

3. Click.

4. Remove the phone number in order to bring up all records for this customer.

```
First Name: Armando
Last Name: Stewart
Phone:
Source: Any
```

5. The star is an inactive customer. The key is a sold customer. The 2 people is an active customer.

4. Click the box beside the names to select all duplicate records. **You can merge a max of 5 records. It is highly recommended that you only merge customers of the same status. Meaning merge active to active only OR merge inactive to inactive only.**

4. Click.

5. Select the items from each record you wish to merge together.
6. Scroll down and click **Merge**.