

Combining Debtors

How to merge two existing debtors

Combining or merging debtors is useful when a debtor was accidentally entered twice. Combining debtors will merge another debtor's debts, contacts, etc. with the current debtor. In order to combine two debtors you need to know both debtor IDs.

1. Go to admin > debtor and search for the debtor account you want to keep—once the merge is complete this is the debtor ID that will be used. Click the name to open the debtor account.

The screenshot shows the Lariat Admin interface. On the left is the 'Admin Menu' with options like Daily Activities, Debtor, Client, Reconcile, Move Debtors, Reporting, Agency Performance, Statistics, Reports, and Query Engine. The main area is titled 'Debtor' and contains a search bar with a dropdown menu set to 'Full Name' and a 'Q Search' button. Below the search bar is a 'Search Results' table. The table header indicates 'Found 75 matching records.. Displaying 1 through 20'. The table has two columns: 'Name' and 'Account Number'. The first row is 'Abadene LLC' with account number '1163', and the second row is 'ABD' with account number '1132'. A red arrow points to the 'Abadene LLC' entry.

Name	Account Number
Abadene LLC	1163
ABD	1132

2. Click “combine debtors” at the top of the screen.

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At the top of the screen, there is a navigation bar with the following links: [Product Instances](#) | [Documents](#) | [Add Debt](#) | [Add Transaction](#) | [View Transactions](#) | [Letter](#) | [Notes](#) | [Contacts](#) | [Combine Debtors](#) | [BI](#). The 'Combine Debtors' link is highlighted with a red box.

3. Enter the debtor ID for the debtor you want to merge into the current debtor. The current debtor's ID is displayed on this page, in parentheses, for your reference.
Note: combining debtors is irreversible and the duplicate (as entered below) will be deleted after the merge. Once you're sure you want to proceed, click "save."

Admin Menu

- Daily Activities
- Debtor
- Client
- Reconcile
- Move Debtors
- Reporting
- Agency Performance
- Statistics

Combine Debtor

This page allows you to merge debtors. It is useful, for example, when a debtor was accidentally entered twice (1163).

Warning
This process is irreversible. The debtor id you enter will be combined with the current debtor and deleted from the system before clicking OK.

Debtor ID

4. The debtors are merged and all information will now be associated to one Lariat debtor ID. (Debtor ID 1446, in the above example.)

Still have questions? Contact us at support@lariat.co

or call 877.268.6667.