

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.

Lariat [Debtors](#) [Events](#) [Admin](#) [Q Search](#)

Admin Menu

- [Daily Activities](#)
- [Debtor](#)
- [Client](#)
- [Reconcile](#)
- [Move Debtors](#)
- [Reporting](#)
- [Agency Performance](#)
- [Statistics](#)
- [Reports](#)

Debtor

[Add Debtor](#) | [List All Debtors](#)

Search for a debtor below by providing a partial name or account number.

* Full Name

Search Results

Found 75 matching records..
Displaying 1 through 20

Name	Account Number
Abadene LLC	1163
ABD	1132

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

Lariat
Debtors
Events
Admin
Search

Admin Menu

- [Daily Activities](#)
- [Debtor](#)
- [Client](#)
- [Reconcile](#)
- [Move Debtors](#)

[Product Instances](#) | [Documents](#) | [Add Debt](#) | [Add Transaction](#) | [View Transactions](#) | [Letter](#) | [Notes](#) | [Contacts](#) | [Combine Debtors](#) | [CB](#)
CB

Account Number - 1163
1163
Load

Business Contact

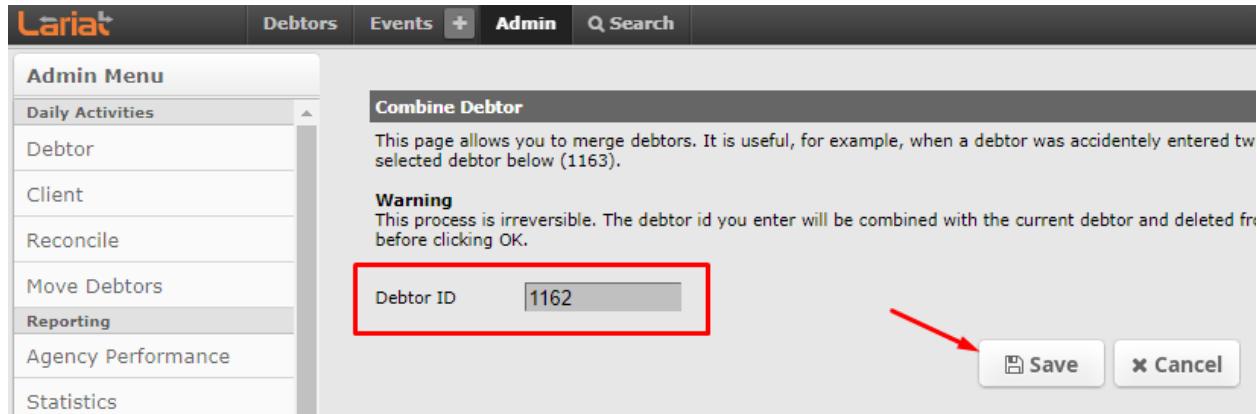
 Abadene LLC

Name

 None

Language

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."



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Debtors Events Admin Search

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. Enter the debtor id you want to merge into the current debtor.

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

Save Cancel

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.