

Combining Companies

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Overview If a company has two records, and there should only be one, the Combine Companies tool will merge these two records into one. *(Please note that this feature is set by a security permission. Please contact support@gradleaders.com for assistance if the tool is not available.)* **When utilizing the Combine Company tool, the system will move the history and information from the Source Company to the Destination Company. The destination company record is never updated or changed, so this should be used carefully.** For example, if the source company record does not have an address listed, and the destination does, the final record will have the address from the destination company record. In this example, the opposite is true. If the source company record does have the address, and the destination

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