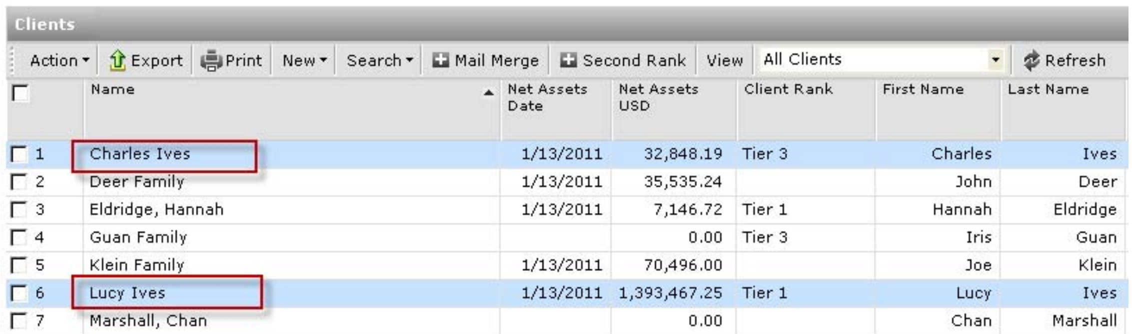
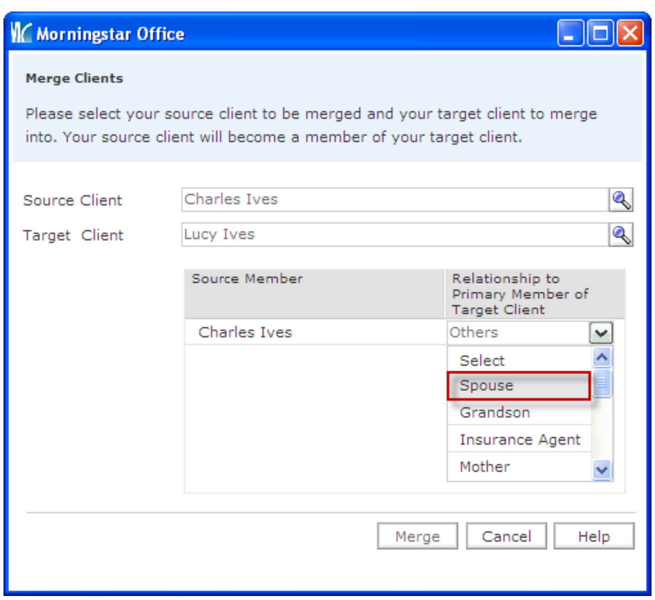
Merging and Un-Merging Clients in Morningstar Office

I. Merging Clients

If your client list currently displays members of a family as separate clients, but you wish to combine them together into a single household, follow the steps below to merge clients.



1. Within Morningstar Office, click Client Management → Clients. You'll see the full list of all clients in your practice.
2. Within your clients list, place a check mark in the box next to one of the family members. Then click **Action → Merge Clients.**
3. In the "Merge Clients" window, you'll see a field labeled "Source Client" containing the name of the client you have selected. You'll also see a field labeled "Target Client," which is blank. Click on the magnifying glass next to the "Target Client" field.
4. In the next screen, click **Go** to pull the complete list of all clients in your practice. Select the other family member from this list and click **OK**.
5. In the "Merge Clients" window, you'll see a table listing the members of the source client. Use the drop-down menu to specify the relationship of the two family members to one another.



6. Click **Merge**.
7. You'll see a confirmation message appear indicating that the clients have been successfully merged. Click Refresh to see your updated list of clients.
8. The "source client" you selected first to merge has disappeared from the list, but you will still see the "target client" listed. Double-click on the target client.
9. In the Client screen, click **Client Profile → General**. You will now see that both individuals are included as members of the client. In the **Accounts** screen, you'll also see the accounts of all members listed.
10. Because the client now represents a household, you'll need to edit the client name. Type the household name into the **Client Name** field.

11. Finally, click **Save** to save your changes. If you still need to add other members to the household, repeat this process as many times as necessary. Select each outstanding member as the source client, and then select the household as the target client.

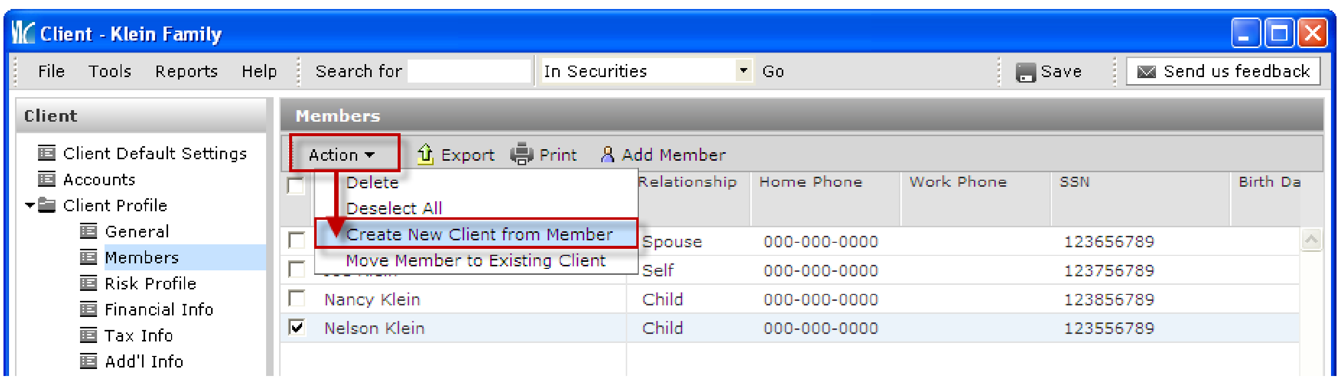
II. "Un-merging" clients

There are two ways to remove an individual member from a household: Either create a new client for the individual, or make the individual a member of another household.

NOTE: It is not possible to remove the "primary member" of a household out of the household. The primary member is the member whose relationships is listed as "Self" in the members screen of the Client Profile.

CREATING A BRAND NEW CLIENT FROM A MEMBER

1. In your clients list, double-click on the household from which you are removing a member. The client window will open.
2. In the client window, click Client **Profile → Members**. You'll see the list of all members in the household.
3. Place a checkmark next to the member you with to remove. Click **Action → Create New Client From Member.**



4. You'll see a new client window appear. The "Client Name" field will display the name of the member you have removed. Click **Save**. Your member has now been removed from the household and established as a separate client. If you open the "Accounts" screen, you'll see that all of the member's accounts have been moved into the new Client as well.

MOVING A MEMBER INTO ANOTHER HOUSEHOLD

1. In your clients list, double-click on the household from which you are removing a member. The client window will open.
2. In the client window, click Client **Profile → Members**. You'll see the list of all members in the household.
3. Place a checkmark next to the member you with to remove. Click **Action → Move Member to Existing Client.**
4. In the dialog box that opens, click the magnifying glass next to "Client." By default this field displays the name of the current household.

5. In the search window that opens, click on the name of the household into which you are moving the member. Click **OK**.
6. You'll be returned to the Members screen of the original household. The member you have moved will no longer appear on the list.
7. Return to Client Management→ Clients and open the household into which you just moved the member. You'll see that the member and all of the accounts have successfully transferred into the new household.