Manage accounts

September 10, 2026

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Account merging combines one or more existing accounts into one account that you select as
the target. Use **Manage accounts** when duplicate account records need to be brought together
from the configuration area.

If you need to…	Go to
Open the configuration screen	Find Manage accounts
Review the two account-selection controls and the action available	Understand the merge screen
Combine source accounts into one target account	Select accounts and confirm a merge
Resolve access, selection, or request problems	Handle access, validation, and errors
Continue account maintenance	Know what happens next
Review or create an account before merging	Accounts or Create an account

With the purpose clear, continue to Before you start.

Before you start

Before you begin, identify the source accounts you want to combine and the target account you want
to keep. A source account is one you combine; the target account is the one you keep. The screen
loads the account list through the account lookup for the selected branches;
the account names therefore come from that list rather than from a fixed set of

choices.

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Prerequisites

- The configuration subscription that provides the account-merge feature is available. When it is
  not available, the screen takes the subscription-upgrade path instead of showing the merge area.
  .
- The account records needed for the merge already exist in the account lookup.
  .
- You can identify which accounts are the sources and which account is the target.
  .
- The target is different from every selected source account. If the target is also a source, the
  merge is stopped before confirmation. .
- Neither account-selection control has a required marker in the page definition. The merge action still
  requires at least one source selection and one target selection. .

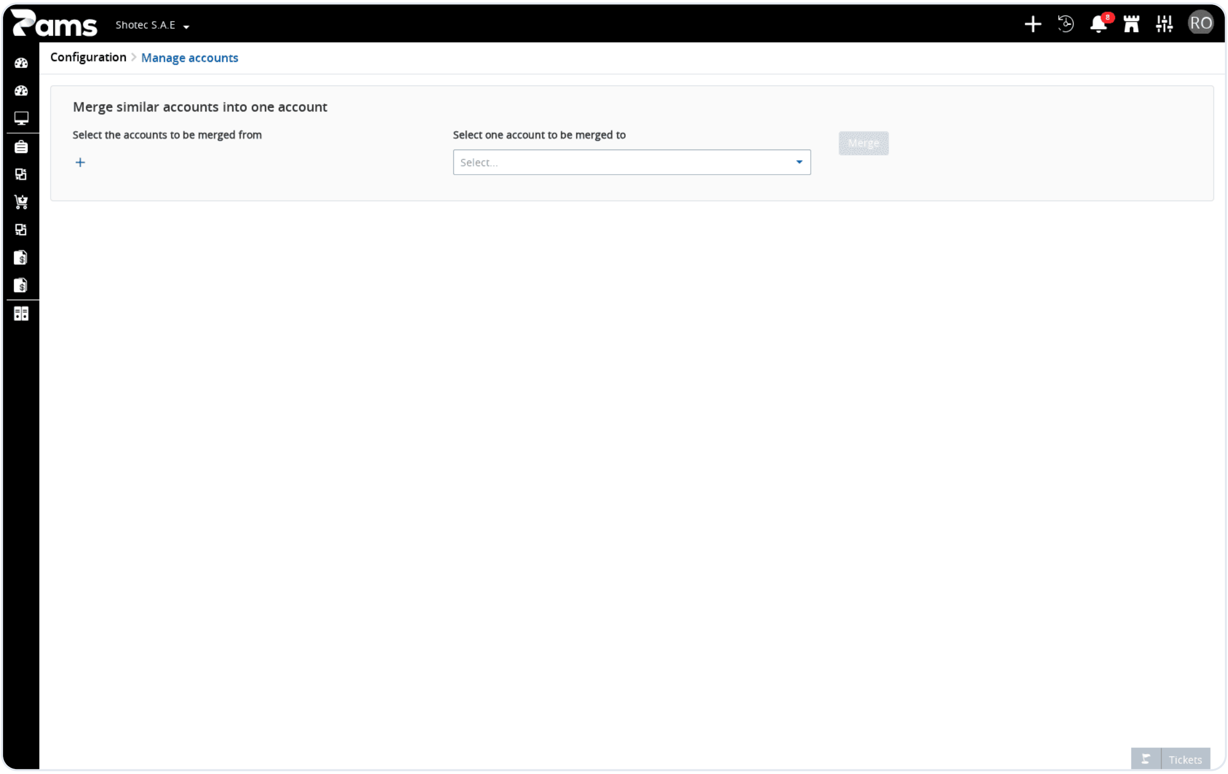
When these prerequisites are ready, continue to Find Manage accounts.

Find Manage accounts

Open **Manage accounts** from the configuration menu.

Steps

1. Open the configuration menu.
2. Select **Manage accounts**.
3. Confirm that the **Manage accounts** heading is displayed.



Result: The **Manage accounts** screen is open with the account-merge area available.

Continue to Understand the merge screen.

Understand the merge screen

An account-selection control is a picker for choosing one or more account records. The merge area has two account-selection controls and one merge action. **Select the accounts to be merged from** accepts multiple source accounts; **Select one account to be merged to** accepts one target account. Both account-selection controls receive account records loaded for the selected branches, and the account names are not fixed labels on the page.

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What you need to do	Control	How it works
Choose accounts to combine	**Select the accounts to be merged from**	Multi-selection picker; adding and removing an item updates the source selection. The list contains account records for the selected branches with account type `0`; each record is identified by its account ID and displays its account name.

What you need to do	Control	How it works
Choose the account to keep	**Select one account to be merged to**	Single-selection picker; adding or removing an item updates the target selection. The list contains account records for the selected branches with account type `0`; each record is identified by its account ID and displays its account name.
Start the merge	**Merge**	Available when at least one source and one target are selected.

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The page displays the two picker labels and **Merge**, with no required marker.

> **Note:** The account list is loaded for the selected branches, so use the account names shown
> in the account-selection controls when choosing the source and target.

The merge area focuses on the two account-selection controls and **Merge**; use the import dialog for file uploads.

With the controls identified, continue to Select accounts and confirm a merge.

Select accounts and confirm a merge

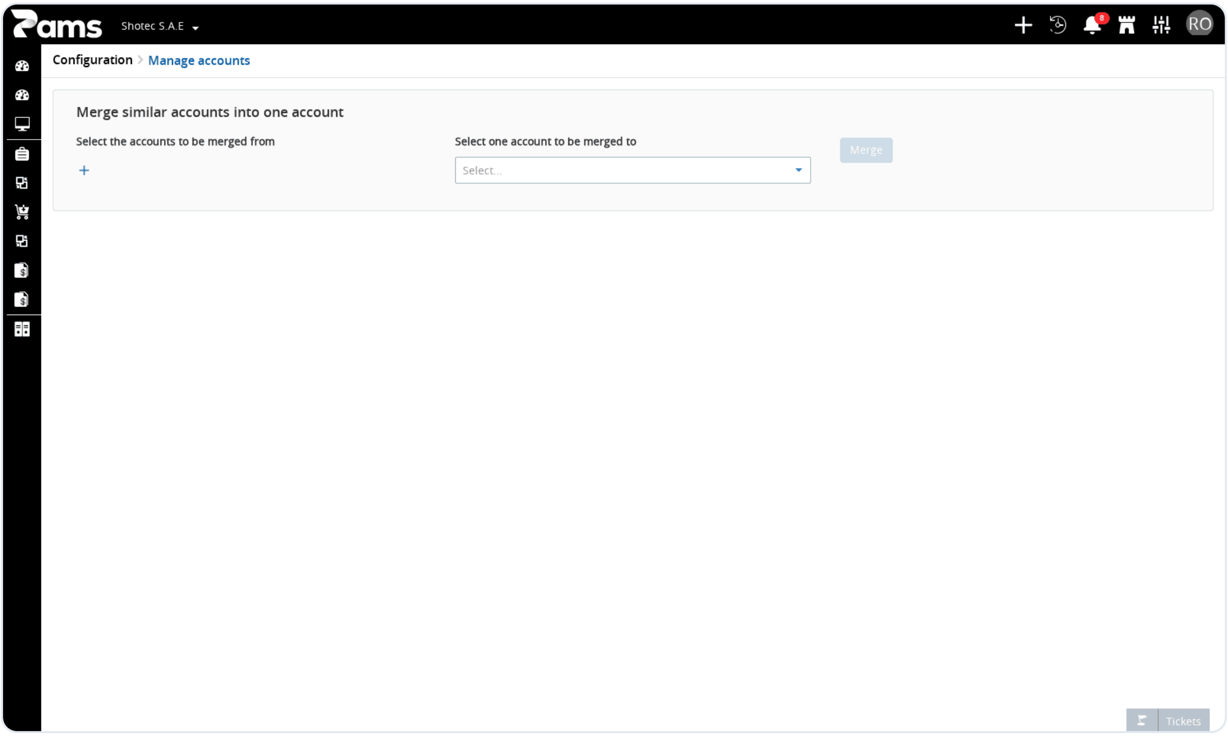
Before you start, identify the account records to combine and the account to keep.

Prerequisites

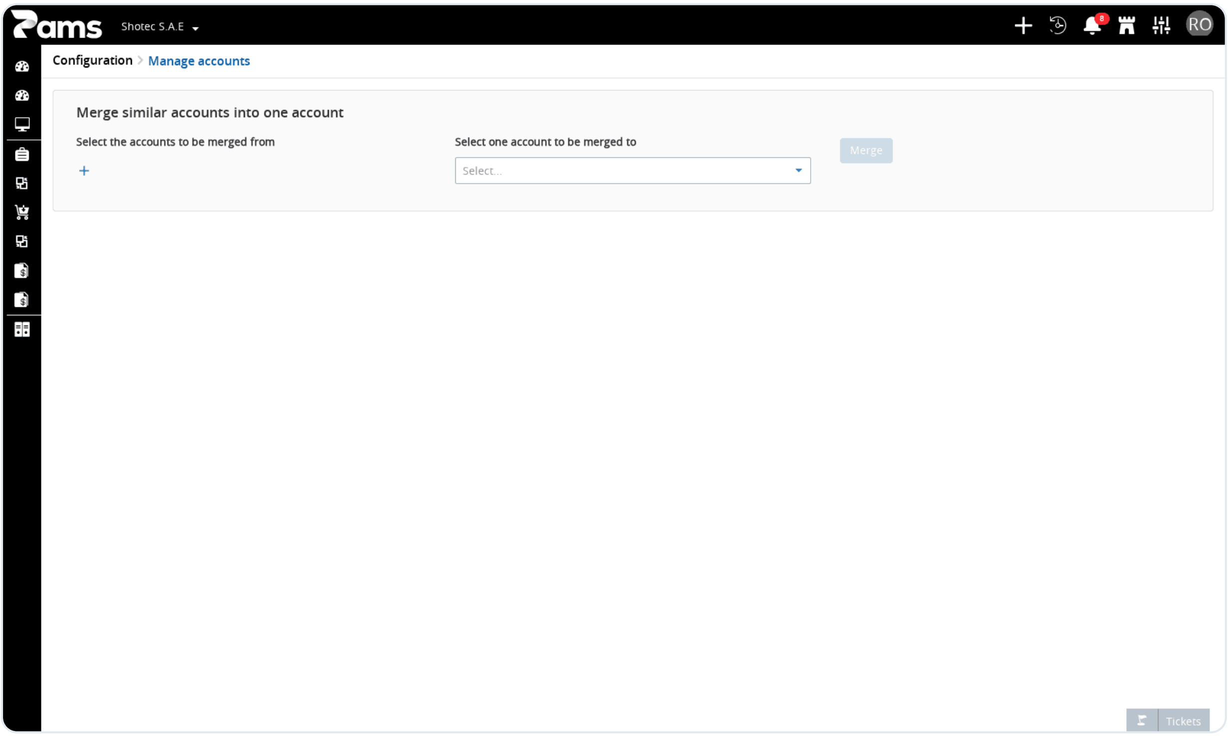
- The merge area is visible.
- At least one source account and one different target account are available in the account-selection controls.

Steps

1. In **Select the accounts to be merged from**, select each account that you want to combine. The
   list contains account records for the selected branches with account type `0`; each record is
   identified by its account ID and displays its account name.



2. In **Select one account to be merged to**, select the account that you want to keep. The list contains account records for the selected branches with account type `0`; each record is identified by its account ID and displays its account name.



3. Select **Merge**.

4. If the confirmation dialog opens, read `You are about to merge these accounts, Are you sure?`.
   .
5. At the confirmation choice, select one of the following:
   .

If you need to…	Select
Send the selected merge request	**Yes**
Keep the selected accounts unchanged	**No**

Result: After step 3, the valid-selection path opens the merge confirmation choice.

If a message or alternate access path appears, continue to Handle access, validation, and errors.

Handle access, validation, and errors

The screen has separate paths for feature access, an invalid source-target combination, and a
request failure. Use the path that matches what is on screen.

What you see	What it means	What to do
The subscription-upgrade area appears instead of the merge area	The account-merge feature is not available on this configuration path.	Use the available subscription process, or contact the administrator who manages your configuration.
`The target account cannot be one of the selected source accounts. Please choose a different account.`	The target is also selected as a source.	Return to **Select one account to be merged to** and choose an account that is not in the source selection.
`An error occurred while processing your request` while account data loads	The account lookup request failed.	Reload the screen and try again. If the error persists, contact your administrator.
`An error occurred while processing your request` after the merge request	The merge request failed.	Reload the screen and try again. If the error persists, contact your administrator.

The shared popup also supplies **Cancel** for its supported popup modes.

Steps

1. Compare the message on screen with the table above.
2. If the message says `The target account cannot be one of the selected source accounts. Please choose a different account.`, return to **Select one account to be merged to**.
3. If the message appears while account data loads, reload the screen and try again. If it appears after you select **Merge**, reload the screen and try again. If the message persists, contact your administrator.
4. Choose the action that matches the open prompt:

If…	Select
The merge confirmation is open and you want to stop	**No**
A supported shared popup is open and you want to close it	**Cancel**

Result: You have either corrected the selection, stopped the confirmation, or identified the
request error shown by the screen.

When the request succeeds, continue to Know what happens next.

Know what happens next

After a confirmed merge, the component clears the source and target selections, reloads the account
lookup, shows `Your request was completed successfully`, and refreshes log history when the reader
stays on the page.

The merge request sends the selected source accounts and target account to the accounts merge
endpoint.

Steps

1. Select **Yes** in the confirmation dialog.
2. Confirm that the source and target selections clear.
3. Confirm that the account list reloads.
4. Confirm that the screen shows `Your request was completed successfully`.

Result: The selected merge request is complete when the selections clear, the account list reloads, and the success message appears.

Continue with Accounts for account maintenance or Create an account when another account record is needed.