Managing Duplicate Accounts in Salesforce

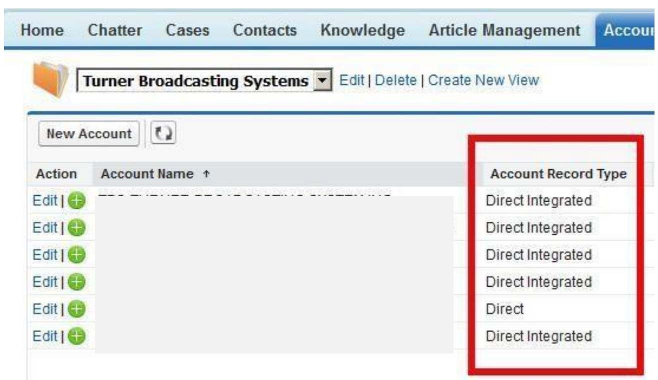
Maintenance of an account's information is shared between Salesforce and Oracle. Sales and service information are managed in Salesforce. Financial and order information are managed in Oracle. Information flows from Oracle into Salesforce.

Salesforce Account Record Types

When you find a duplicate account in Salesforce that you want removed, look at its Account Record Type. The steps to follow for merging away the account will depend on this.

Account Record Types in Salesforce include:

- Direct
- Direct Integrated



Direct accounts are not integrated with Oracle. They can be updated in Salesforce but cannot be used for Service cases, RMA orders, asset association, or Customer Community access. Generally, no one should be working on Direct account records.

Removing Direct Accounts from Salesforce

Accounts cannot be deleted in Salesforce because information for contacts and cases will be lost. Therefore, accounts can only be merged.

Direct accounts can only be merged away in Salesforce by someone with the proper permissions.

To have Direct Integrated Accounts removed from Salesforce

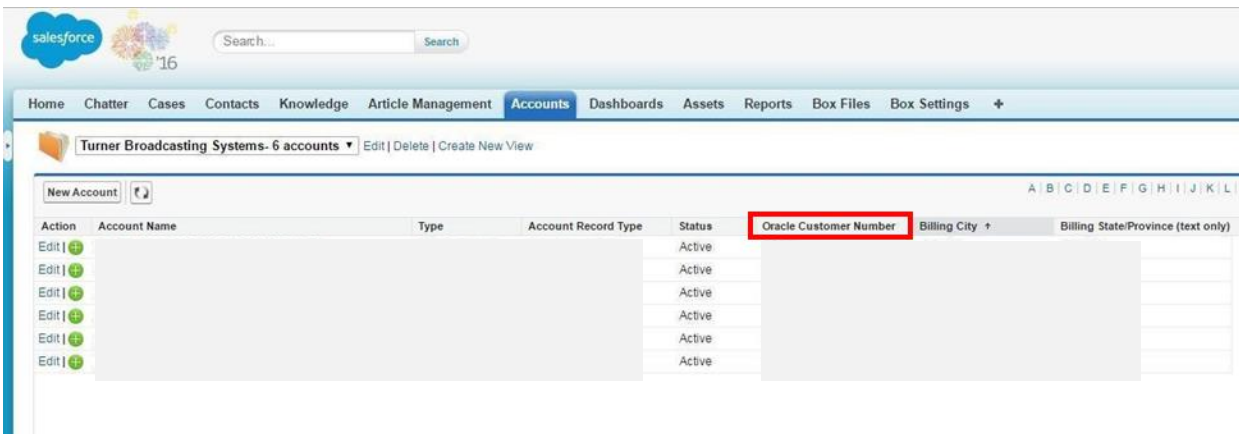
- Send a request and a list of the accounts to portal@imaginecomunications.com.

Removing Direct Integrated Accounts from Salesforce

Direct Integrated accounts in Salesforce are synchronized with Oracle and cannot be merged away in Salesforce.

To have Direct Integrated Accounts removed from Salesforce

1. Create a list of accounts to be merged. Be sure to include the Oracle Customer Number for each account.



2. Send the list of accounts and the instructions for your request to Finance at LTICreditNotification@imaginecommunications.com.

3. Once Finance has merged the accounts, verify that the accounts have the correct Active and Inactive status in Salesforce.