Duplicate Account Management in Salesforce

Accounts are maintained on two levels, in Oracle, and Salesforce. Our financial and order information is managed in Oracle while our sales and service information are managed in Salesforce. This creates a situation where we need to interface between the two systems to keep some aspects of the information synchronized.

Merging Duplicate Accounts in Salesforce

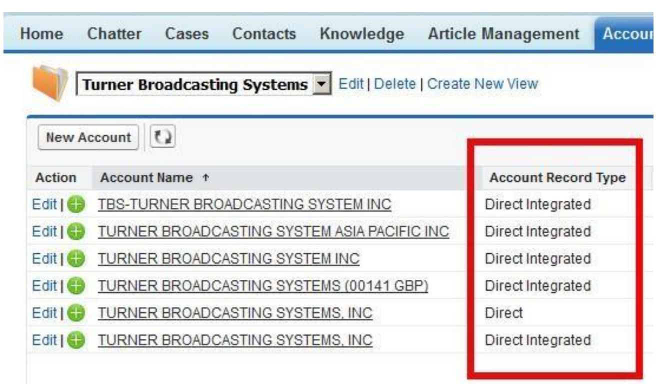
When you find a duplicate account in Salesforce, look at its *Account Record Type*. The steps for merging it will depend on this. If more than one of the accounts is *Integrated*, the first steps must be done in Oracle by Finance.

Salesforce Account Record Types

Account Record Types in Salesforce include:

- Direct
- Direct Integrated
- Partner
- Partner Integrated

When an Account Record Type is *Integrated* this means it is interfaced and synchronized with the Oracle account.



There are several aspects of Integrated accounts that can only be changed by the Finance team in Oracle. Those changes should automatically update in Salesforce.

- Account Name
- All Address Fields
- All Account Financial Fields

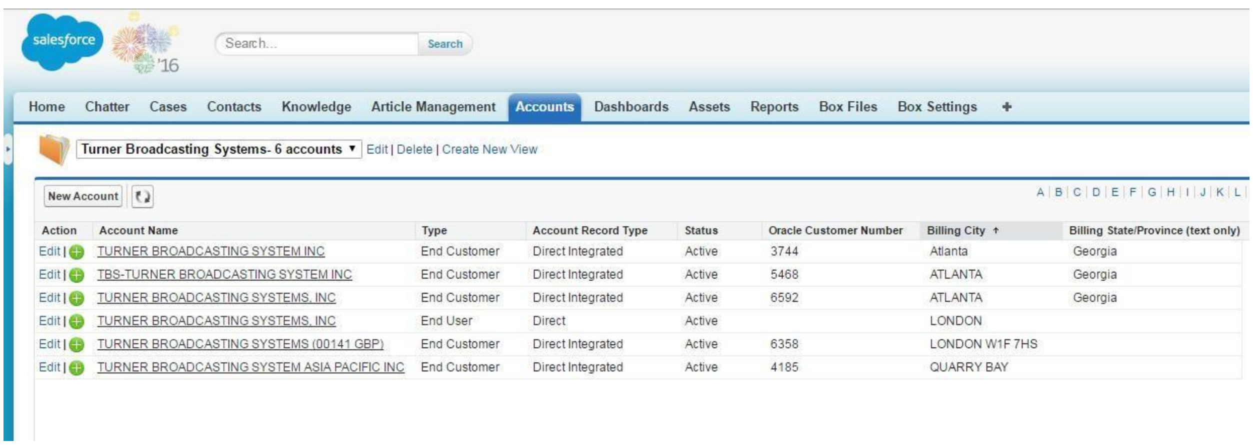
When an Account Record Type is *Direct* it is not integrated with Oracle and can be updated in Salesforce, however, these accounts cannot be used for Service cases, RMA orders, asset association, or Customer Community access.

Merging Accounts in Oracle

Accounts can only be merged in Oracle by Finance. To have an account merged by Finance, do the following.

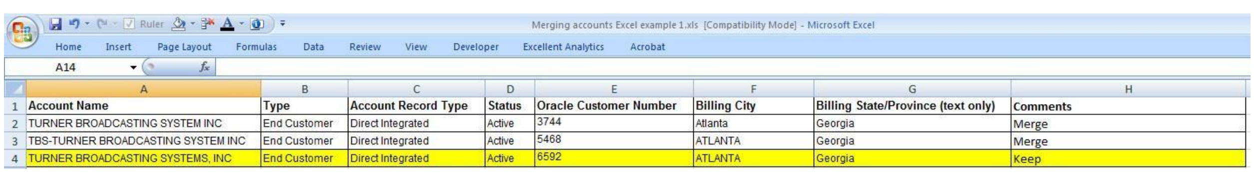
Note: Accounts with different Billing Addresses cannot be merged in Oracle.

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



Action	Account Name	Type	Account Record Type	Status	Oracle Customer Number	Billing City	Billing State/Province (text only)
Edit		TURNER BROADCASTING SYSTEM INC	End Customer	Direct Integrated	Active	3744	Atlanta	Georgia
Edit		TBS-TURNER BROADCASTING SYSTEM INC	End Customer	Direct Integrated	Active	5468	ATLANTA	Georgia
Edit		TURNER BROADCASTING SYSTEMS, INC	End Customer	Direct Integrated	Active	6592	ATLANTA	Georgia
Edit		TURNER BROADCASTING SYSTEMS, INC	End User	Direct	Active		LONDON	
Edit		TURNER BROADCASTING SYSTEMS (00141 GBP)	End Customer	Direct Integrated	Active	6358	LONDON W1F 7HS	
Edit		TURNER BROADCASTING SYSTEM ASIA PACIFIC INC	End Customer	Direct Integrated	Active	4185	QUARRY BAY	

2. Send the list to Finance (LTICreditNotification@imaginecommunications.com) with instructions for your request.



	Account Name	Type	Account Record Type	Status	Oracle Customer Number	Billing City	Billing State/Province (text only)	Comments
2	TURNER BROADCASTING SYSTEM INC	End Customer	Direct Integrated	Active	3744	Atlanta	Georgia	Merge
3	TBS-TURNER BROADCASTING SYSTEM INC	End Customer	Direct Integrated	Active	5468	ATLANTA	Georgia	Merge
4	TURNER BROADCASTING SYSTEMS, INC	End Customer	Direct Integrated	Active	6592	ATLANTA	Georgia	Keep

Once Finance has completed the merge verify that the information update is reflected in Salesforce.

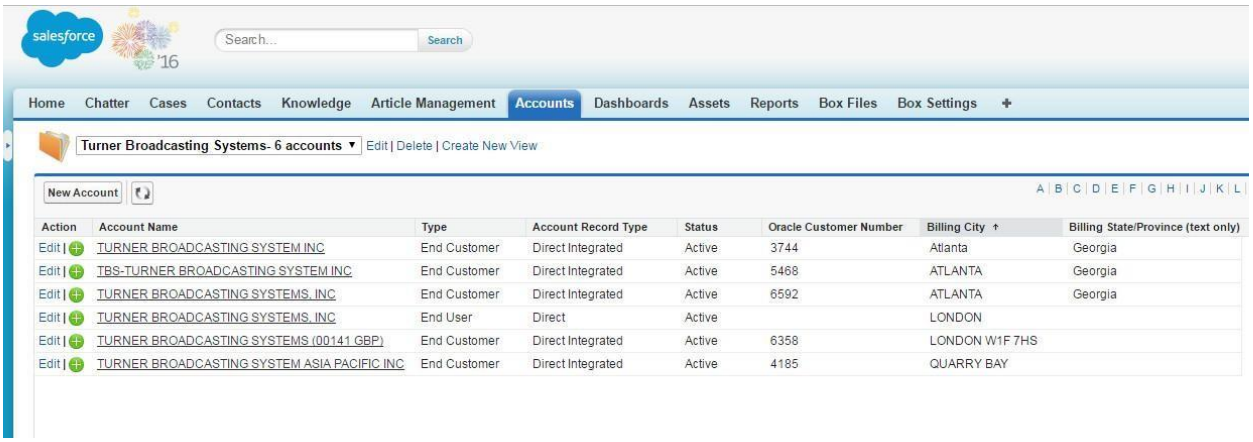
Merging Accounts in Salesforce

Accounts cannot be deleted in Salesforce because the contacts, cases, and other information will be lost. Therefore, accounts can only be merged. To merge accounts in Salesforce they must first have their status changed to *Inactive* in Oracle by Finance (the account to be kept remains *Active*). Once this has been done the account can be merged in Salesforce by someone with the proper permissions.

Customer Community

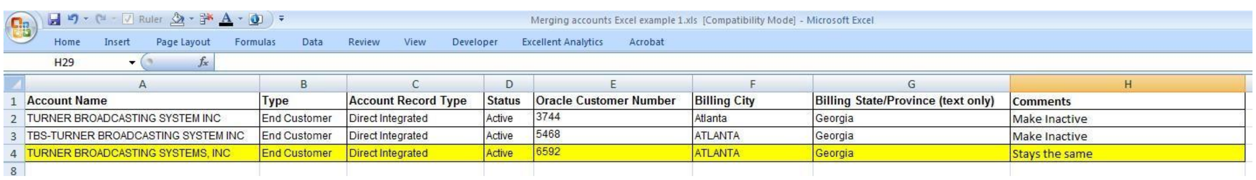
To merge accounts in Salesforce, do the following.

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



Action	Account Name	Type	Account Record Type	Status	Oracle Customer Number	Billing City ↑	Billing State/Province (text only)
Edit		TURNER BROADCASTING SYSTEM INC	End Customer	Direct Integrated	Active	3744	Atlanta	Georgia
Edit		TBS-TURNER BROADCASTING SYSTEM INC	End Customer	Direct Integrated	Active	5468	ATLANTA	Georgia
Edit		TURNER BROADCASTING SYSTEMS, INC	End Customer	Direct Integrated	Active	6592	ATLANTA	Georgia
Edit		TURNER BROADCASTING SYSTEMS, INC	End User	Direct	Active		LONDON	
Edit		TURNER BROADCASTING SYSTEMS (00141 GBP)	End Customer	Direct Integrated	Active	6358	LONDON W1F 7HS	
Edit		TURNER BROADCASTING SYSTEM ASIA PACIFIC INC	End Customer	Direct Integrated	Active	4185	QUARRY BAY	

3. Send the list to Finance (LTICreditNotification@imaginecommunications.com) with instructions for your request.



	Account Name	Type	Account Record Type	Status	Oracle Customer Number	Billing City	Billing State/Province (text only)	Comments
2	TURNER BROADCASTING SYSTEM INC	End Customer	Direct Integrated	Active	3744	Atlanta	Georgia	Make Inactive
3	TBS-TURNER BROADCASTING SYSTEM INC	End Customer	Direct Integrated	Active	5468	ATLANTA	Georgia	Make Inactive
4	TURNER BROADCASTING SYSTEMS, INC	End Customer	Direct Integrated	Active	6592	ATLANTA	Georgia	Stays the same

2. Once the list has been merged by Finance verify that the accounts have the correct Active and Inactive status in Salesforce.