

Merging Accounts

Last Modified on 07/01/2026 3:51 pm EDT

Merging Accounts

[Records](#) > [Accounts](#) > [Edit \(click dropdown arrow\)](#) > [Merge](#)

Video Tutorial

Click the play button below for a video tutorial. This tutorial is about 6 minutes long. Written instructions are below the video.

NOTE: *If viewing from the right-side screen, to open the video on a larger screen, use the "Open in full site" link at the bottom left of the help display. If you are already viewing from the full site, click the play button below to begin the tutorial.*

Your browser does not support HTML5 video.

Step-by-Step Instructions

Merges G/L accounts, one into another. This includes balances as well as all transactions. Once merged, the account you are merging from will then be deleted.

It is recommended that no one enter or budget for any of the accounts being merged while the merge is running. All merged accounts will also be recorded in the [account audit history](#).

Merge Tab

Merge by: For a simple merge, choose to merge by account. If you wish to merge multiple accounts by an account division, select the division to merge by on the top of the screen. You can only merge one range of accounts at a time, with one type of account division at a time.

Filter (Appears on Specific Merge by): If merging for an account division rather than the whole account, you can specify an account filter or a range of accounts to limit the merge to. [Click here](#) to see how selections work.

Budget components: The monthly budget totals will merge together regardless, but this determines how the component details will merge together.

- **Merge together as additional rows:** This is the recommended choice for merging components that have multiple lines, which is typical, except for something like membership, where components are forced to one row per month.
- **Merge numbers together in the same row:** Use this if components are forced to be in one row per month, such as membership. It will merge all numbers into the same row. Text and checkbox columns will remain as the To column is set.
- **Use from account:** This preserves the components in the from account, which will cause

them to be out of sync with the monthly budget totals.

- **Use to account:** Preserves the components in the to account. This will throw the components out of sync with the monthly budget totals.
- **Delete for both from and to accounts:** Deletes all budget allocations for each account.

Create accounts that don't exist: Two accounts must exist to merge into them. If they don't exist and you wish to create them, then check this. All accounts that are added will be marked as active.

Table Tab

Click the new button to add the from and to accounts or account divisions (depending on what you have selected at the top).

Log Tab

This is a written log that shows what accounts are merged and any errors that occur.

Buttons (top of Merge G/L Accounts Screen)

Merge: First, validate, and if no errors are found, proceed with the merge process.

Validate: Click this if you want to get a list of any errors first. You can then export the log to text and print it if you wish, using your favorite word processor.

Cancel: Closes the dialog box.

Reports: Exports the log to an Excel file or prints it.

Not Included in Merge

- Custom Information will be deleted for the from account.
 - Account Comments will be deleted for the from account.
 - Account Attachments will be deleted for the from account.
 - Report Descriptions will be deleted from the account. Report descriptions will not be copied!
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IMPORTANT: Permissions Needed

You will get a warning if merging across funds, if you proceed in doing so, this will throw your funds out of balance unless you are merging multiple accounts that, when totaled, balance to zero. You must have a security level of 99 on this task to even be allowed to do this.
