

## Merge

Last Modified on 05/18/2023 3:24 pm EDT

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 do entry or budgeting to any of the accounts being merged while a merge is running. All accounts merged will also be recorded in the [account audit history](#).

**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:** 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 no matter what, but this determines how to merge the component detail together.

- **Merge together as additional rows:** This is the recommended choice for merging components that have multiple lines, which is typical with the exception of 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 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 accounts:** Preserves the components in the from account. This will throw the components out of sync with the monthly budget totals.
- **Use to accounts:** 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:** To accounts must exist in order 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:** Add the from and to accounts or account divisions (depending on what you have selected on the top) by clicking the new button.

**Log:** This is a written log that shows what accounts are merged as well as any error that occurs.

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## Buttons

**Merge:** First validates and if no errors are found, proceeds with the merge process.

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

**Reports:** Exports the log to a text file, Excel file, or prints it.

**What won't 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 in the from account. Report descriptions will not be copied!

**Security**

*You will get a warning if merging across funds, however 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.*

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