

How to Merge Accounts in Salesforce (Switching from Lightning to Classic)

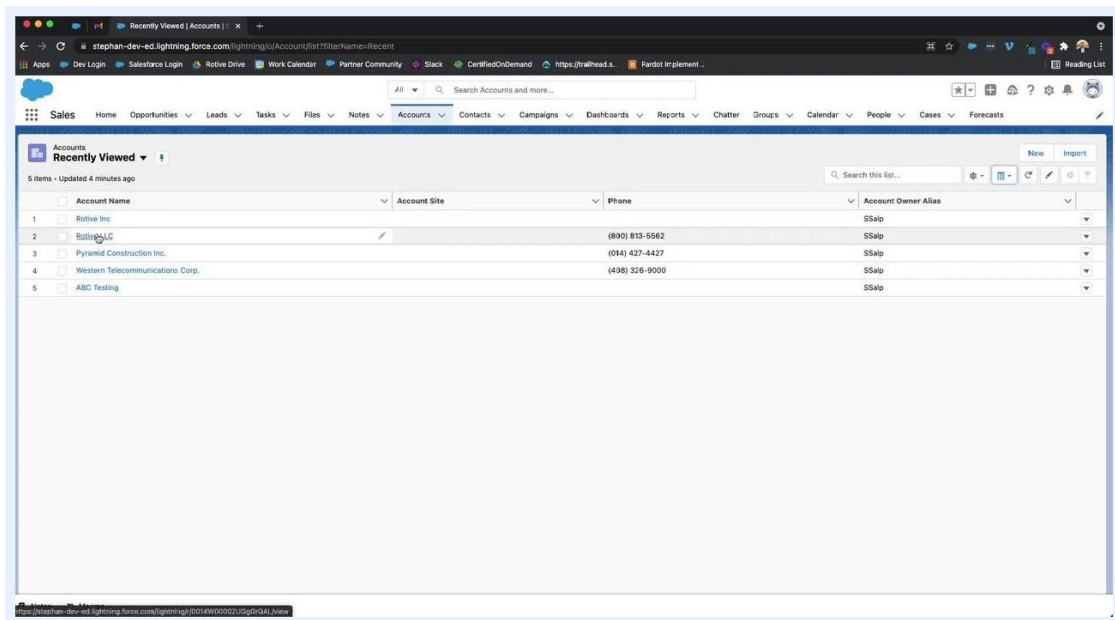
When duplicate account records exist in Salesforce, you can merge them using the Merge Accounts tool, which is only available in Salesforce Classic. This guide walks you through identifying duplicate accounts in Lightning Experience, switching to Classic to perform the merge, and verifying the result back in Lightning Experience.

Prerequisites

- Access to Salesforce with permissions to view and merge account records.
- Ability to switch between Salesforce Lightning Experience and Salesforce Classic.

Step 1: Identify duplicate accounts in Lightning Experience

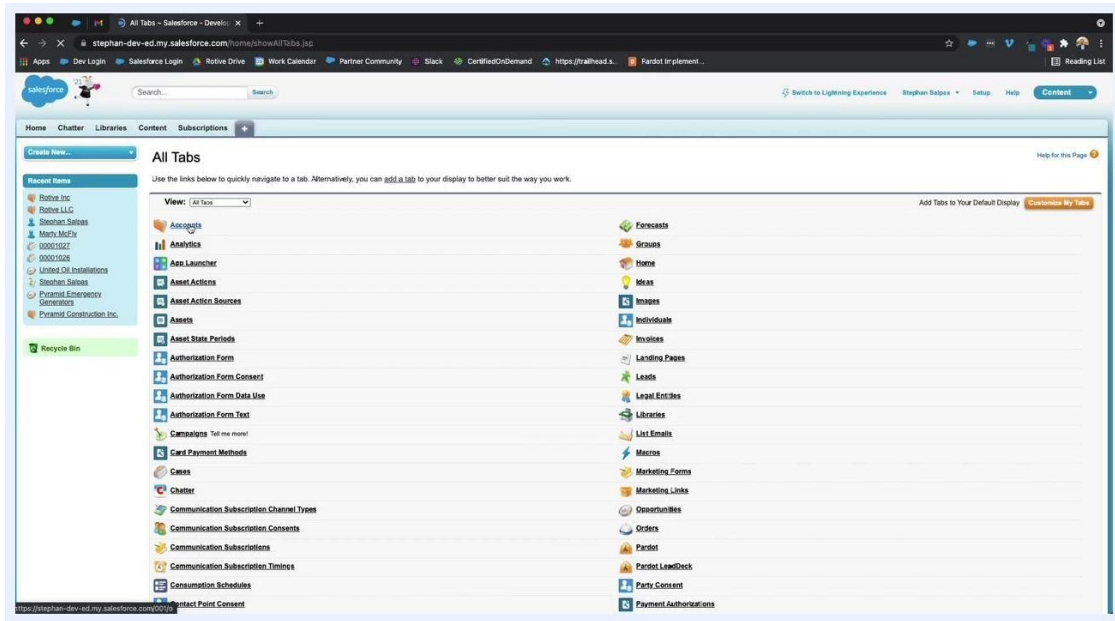
Open Salesforce and navigate to the Accounts tab. Review the list of accounts for duplicates. In this example, there are two accounts: "Rotive Inc" and "Rotive LLC". Confirm that both accounts are visible in the list.



Salesforce Lightning Experience showing the Accounts tab with duplicate accounts "Rotive Inc" and "Rotive LLC" listed. Columns include Account Name, Account Site, Phone, and Account Owner Alias.

Step 2: Switch to Salesforce Classic

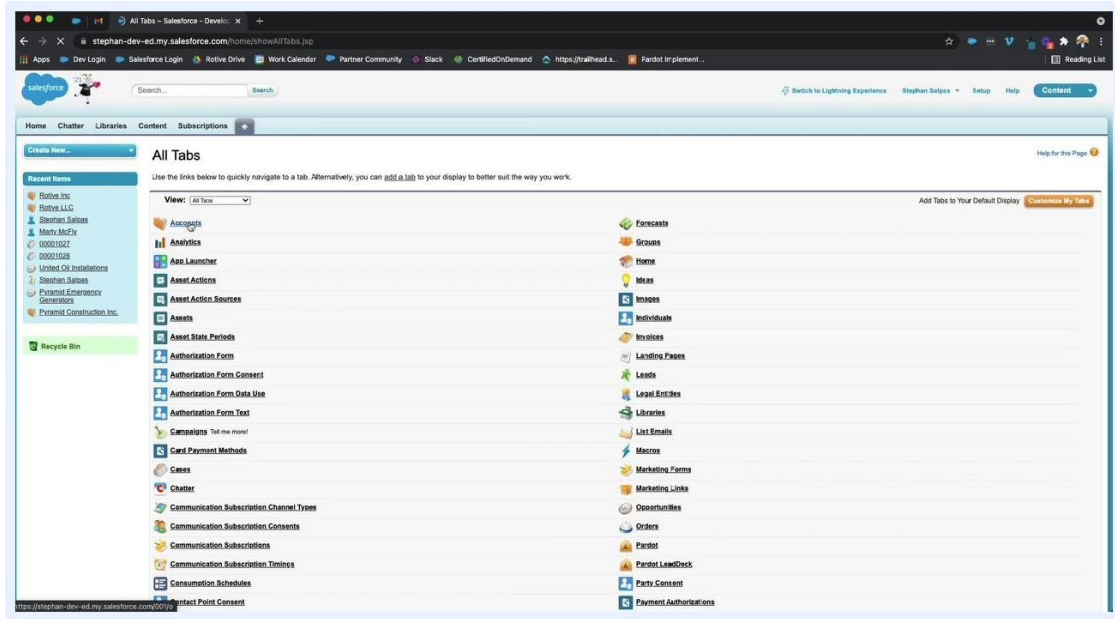
Click your user avatar/profile icon in the top right corner. In the dropdown menu, under Options, click Switch to Salesforce Classic.



Salesforce Lightning Experience with the user profile dropdown open. The "Switch to Salesforce Classic" option is highlighted under Options.

Step 3: Navigate to the Accounts tab in Classic

In Salesforce Classic, click the + (All Tabs) icon in the navigation bar. On the All Tabs page, click the Accounts link to open the Accounts object.



Salesforce Classic "All Tabs" page with a list of available tabs. The "Accounts" link is visible and ready to be clicked.

Step 4: Access the Merge Accounts tool

On the Accounts Home page, locate the Tools section on the right side. Click the Merge Accounts link.

Merge My Accounts

Step 2: Select the values to retain

Select the values that you want to retain in the merged record. Highlighted rows indicate fields that contain conflicting data. The Master Record selected will retain read-only and hidden field values. The oldest Created By date and user will be retained in the merged record.

Note: All related records including any notes, attachments, and activities will be associated with the new merged record.

Field	Retire LLC (Select All)	Retire Inc (Select All)
Master Record	☒	☐
Account Owner	Stephan Salpas	Stephan Salpas
Account Name	Retire LLC	Retire Inc
Account Number		
Account Site		
Type	Installation Partner	
Industry	Construction	
Annual Revenue		
Rating		
Phone	8008135562	
Fax		
Website		
Ticker Symbol		
Ownership		
Employees		
SIC Code		
Billing Address	1234 Business St Austin, Texas 78701 US	
Shipping Address	140 S Arthur St #208 Spokane, Washington 99202 US	
Customer Priority		
SLA Expiration Date		
Number of Locations	Active	
SLA		
SLA Serial Number		
Upstart Opportunity		
Description	Stephan Salpas, 7/23/2021, 1:00 PM	Stephan Salpas, 7/23/2021, 1:00 PM
Created By	Stephan Salpas, 7/23/2021, 1:00 PM	Stephan Salpas, 7/23/2021, 1:00 PM
Last Modified By	Stephan Salpas, 7/23/2021, 1:00 PM	Stephan Salpas, 7/23/2021, 1:00 PM

Salesforce Classic Accounts Home page. The "Merge Accounts" link is visible in the Tools section on the right.

Step 5: Search for duplicate accounts

In the Merge My Accounts wizard, enter a unique keyword from the duplicate accounts (for example, "Rotive") in the search box, then click Find Accounts. Select the checkboxes for the accounts you want to merge — in this case, "Rotive LLC" and "Rotive Inc." — and click Next to proceed.

The screenshot shows the Salesforce Classic "Merge My Accounts" wizard, Step 1. The search box contains "rotive," and both "Rotive LLC" and "Rotive Inc." are selected for merging. The wizard displays a table of fields to be merged, with "Rotive LLC" selected as the Master Record.

Field	Rotive LLC [Select All]	Rotive Inc [Select All]
Master Record	☒	☐
Account Owner	Stephan Salpas	Stephan Salpas
Account Name	Rotive LLC	Rotive Inc
Account Number		
Account Site		
Type	Installation Partner	
Industry	Construction	
Annual Revenue		
Rating		
Phone	8008135562	
Fax		
Website		
Ticker Symbol		
Ownership		
Employees		
SIC Code		
Billing Address	1234 Business st Austin, Texas 78701 US	
Shipping Address	140 S Arthur St #506 Spokane, Washington 99202 US	
Customer Priority		
SLA Expiration Date		
Number of Locations		
Active		
SLA		
SLA Serial Number		
Upsell Opportunity		
Description		
Created By	Stephan Salpas, 7/23/2021, 1:00 PM	Stephan Salpas, 7/23/2021, 1:00 PM
Last Modified By	Stephan Salpas, 7/23/2021, 1:06 PM	Stephan Salpas, 7/23/2021, 1:00 PM

Salesforce Classic "Merge My Accounts" wizard, Step 1. The search box contains "rotive," and both "Rotive LLC" and "Rotive Inc" are selected for merging.

Step 6: Select the values to retain

Review the details for both accounts side by side. For each field (such as Account Owner, Account Name, Type, Industry, Phone, and Billing Address), select the value you want to keep in the merged record. In this example, "Rotive LLC" contains more complete information, so its values are selected for most fields.

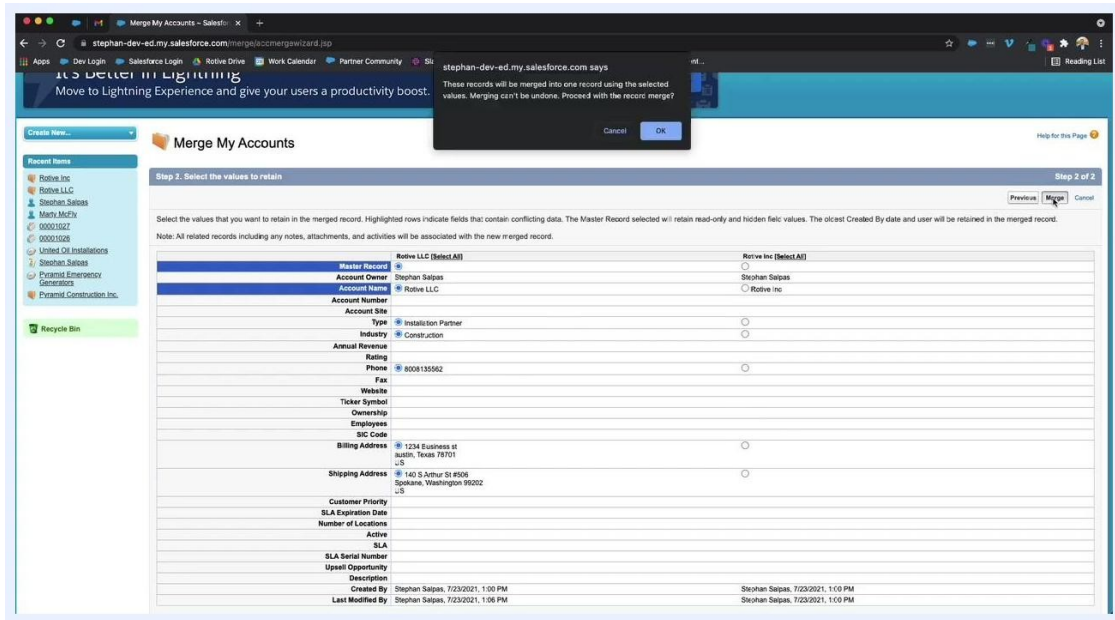
The screenshot shows the 'Merge My Accounts' wizard in Salesforce Classic. A modal window at the top states: 'These records will be merged into one record using the selected values. Merging can't be undone. Proceed with the record merge?' with 'Cancel' and 'OK' buttons. The main interface is titled 'Merge My Accounts' and shows 'Step 2 of 2'. Below the title, a note reads: 'Select the values that you want to retain in the merged record. Highlighted rows indicate fields that contain conflicting data. The Master Record selected will retain read-only and hidden field values. The oldest Created By date and user will be retained in the merged record. Note: All related records including any notes, attachments, and activities will be associated with the new merged record.'

Field	Rotive LLC (Select All)	Rotive Inc (Select All)
Master Record	☒	☐
Account Owner	Stephan Salpas	Stephan Salpas
Account Name	Rotive LLC	Rotive Inc
Account Number		
Account Site		
Type	Installation Partner	
Industry	Construction	
Annual Revenue		
Rating		
Phone	8008135562	
Fax		
Website		
Ticker Symbol		
Ownership		
Employees		
SIC Code		
Billing Address	1234 Business St Austin, Texas 78701 US	
Shipping Address	140 S. Arthur St #506 Bokware, Washington 98022 US	
Customer Priority		
SLA Expiration Date		
Number of Locations		
Active		
SLA		
SLA Serial Number		
Upsell Opportunity		
Description		
Created By	Stephan Salpas, 7/23/2021, 1:00 PM	Stephan Salpas, 7/23/2021, 1:00 PM
Last Modified By	Stephan Salpas, 7/23/2021, 1:00 PM	Stephan Salpas, 7/23/2021, 1:00 PM

Salesforce Classic "Merge My Accounts" wizard, Step 2. Fields from both accounts are displayed side by side for selection. "Rotive LLC" has more complete data.

Step 7: Merge the accounts

After selecting the desired values, click Merge in the top right corner. A confirmation dialog appears stating: "These records will be merged into one record using the selected values. Merging can't be undone. Proceed with the record merge?" Click OK to confirm and complete the merge.



Salesforce Classic merge confirmation dialog: "These records will be merged into one record using the selected values. Merging can't be undone. Proceed with the record merge?" with OK and Cancel buttons.

By following these steps, you can successfully merge duplicate accounts in Salesforce by switching from Lightning Experience to Salesforce Classic and using the built-in Merge Accounts tool.

Verifying the merged account in Salesforce Lightning

After completing the merge, confirm that the account was combined correctly by reviewing it back in Lightning Experience.

Step 1: Return to Salesforce Lightning Experience

After merging the accounts in Salesforce Classic, switch back to Salesforce Lightning Experience. Locate the Accounts tab and search for the merged account name, "Rotive LLC".

Step 2: Confirm only one account exists

Verify that only one account record for "Rotive" is present in the list, and ensure that the merged account is named "Rotive LLC".

Step 3: Open the merged account record

Click Rotive LLC to open the account details page. Confirm that you are viewing the correct account by checking the account name at the top of the page.

Step 4: Review account details

Click the Details tab within the account record and review all key fields to ensure the correct information has been retained from the merge:

- Account Owner: Stephan Salpas
- Account Name: Rotive LLC
- Type: Installation Partner
- Industry: Construction
- Phone: (800) 813-5562
- Billing Address: 1234 Business St, Austin, Texas 78701, US
- Shipping Address: 140 S Arthur St #506, Spokane, Washington 99202, US

Confirm that all other relevant fields, such as Account Site, Website, and any custom fields, display the expected data.

Step 2: Select the values to retain

Select the values that you want to retain in the merged record. Highlighted rows indicate fields that contain conflicting data. The Master Record selected will retain read-only and hidden field values. The oldest Created By date and user will be retained in the merged record.

Note: All related records including any notes, attachments, and activities will be associated with the new merged record.

Rotive LLC (Select All)	Rotive Inc (Select All)
Master Record	
Account Owner: Stephan Salpas	Stephan Salpas
Account Name: Rotive LLC	Rotive Inc
Account Number	
Account Site	
Type: Installation Partner	
Industry: Construction	
Annual Revenue	
Rating	
Phone: 8008135562	
Fax	
Website	
Ticket Symbol	
Ownership	
Employees	
SIC Code	
Billing Address: 1234 Business St Austin, Texas 78701 US	
Shipping Address: 140 S Arthur St #506 Spokane, Washington 99202 US	
Customer Priority	
SLA Expiration Date	
Number of Locations	
Active	
SLA	
SLA Serial Number	
Upsell Opportunity	
Description	
Created By: Stephan Salpas, 7/23/2021, 1:00 PM	Stephan Salpas, 7/23/2021, 1:00 PM
Last Modified By: Stephan Salpas, 7/23/2021, 1:00 PM	Stephan Salpas, 7/23/2021, 1:00 PM

Salesforce Lightning Experience showing the merged "Rotive LLC" account record. The Details tab is open, displaying fields such as Account Owner, Account Name, Type, Industry, Phone, Billing Address, and Shipping Address.

Step 5: Verify data integrity

Double-check that all information you selected during the merge process is present and accurate, and ensure that no duplicate accounts remain for "Rotive".

Step 6: Completion and support

The merge process is now complete. If you have any questions or need further assistance with Salesforce or Pardot, reach out to your Salesforce administrator or support team.

Summary

By following these steps, you can merge duplicate Salesforce accounts using Salesforce Classic's Merge Accounts tool and confirm that your account merge was successful, with all relevant data retained in Salesforce Lightning Experience.