Setting Up Person Accounts

Salesforce, Summer '16

CONTENTS

ABOUT THIS GUIDE

This guide leads you through the process of setting up person accounts and importing data into them.

Accounts are a basic function in Salesforce. Person accounts extend the standard business-to-business account functionality to better facilitate business-to-consumer sales.

Audience

This guide is intended for Salesforce administrators who want to set up Salesforce to operate on a business-to-consumer model. You should be familiar with customizing Salesforce before completing this guide.

Other Resources

Salesforce Success Community
http://success.salesforce.com

Connect with other Salesforce customers, partners, and experts. Ask and answer questions about Salesforce, and view other users' tips, tricks, and answers.

Salesforce Developers
http://developer.salesforce.com

Access developer resources such as toolkits, API documentation, blogs, and discussion areas.

Salesforce Online Help
http://help.salesforce.com

Get the most current information about features and services. Online help is updated with each release.

PERSON ACCOUNT CONCEPTS

Accounts

Use Salesforce accounts to store information about your customers or the entities you are working with, such as companies, schools, government agencies, or individuals.

Think of an account as a file folder in which you store every bit of information you know about a customer. For example, if you're storing information about a company, you include its name, location, a contact person, past or current orders, and other related information. You could also keep a log of phone calls or service requests.

In Salesforce, information about the company itself—its name, location, website, and so on—is stored as an *account record*. Information related to the account, such as a contact person, notes, and orders, is stored in other types of records. Salesforce makes it easy to find all the records related to each account by listing them on the account record's home page. You can locate, create, delete, sort, and filter your accounts from the Accounts tab. Select an account to view its record home page, to edit the account, and access other records related to that account.

There are a few things to know about accounts.

Salesforce Offers Two Types of Accounts

Salesforce accounts are *business accounts* by default. Business accounts are used to store information about companies or other entities. Salesforce administrators can also choose to set up *person accounts*, which are used to store information about individual people. For example, person accounts fit your customers best if they are online shoppers, gym members, vacation travelers, or other individual consumers. Depending on who your company sells to, you might have just one type of account available, or both.

> ✏️ Note: In the Salesforce Help and other documentation, the word *account* by itself always refers to both business accounts and person accounts. We use the terms *business accounts* and *person accounts* when there are differences between the two types of accounts.

The Accounts Feature Can Be Renamed

Your Salesforce administrator can change the name of accounts to something that works better for your business, such as *Clients* or *Patients*. However, we will always refer to them as *accounts* in the Salesforce Help.

Users Can Access Accounts on Mobile Devices

Your accounts are accessible to you from the full Salesforce site or the Salesforce1 mobile application, if your Salesforce administrator has turned on Salesforce1 access.

Accounts Can Be Linked to Social Networks and News

Additional information and updates about your accounts are available if your company uses the Social Accounts, Contacts, and Leads; Account Insights; or Data.com Clean features.

What Is a Person Account?

Person accounts store information about individual consumers.

> 📝 **Note:** This release contains a beta version of person accounts in Lightning Experience that is production quality but has known limitations. For information on enabling person accounts for your organization, see Enable Person Accounts.

Salesforce accounts are *business accounts* by default. Business accounts are used to store information about companies or other entities. Salesforce administrators can also choose to set up *person accounts*, which are used to store information about individual people. For example, person accounts fit your customers best if they are online shoppers, gym members, vacation travelers, or other individual consumers. Depending on who your company sells to, you might have just one type of account available, or both.

Person accounts work differently than business accounts. For example, person accounts can't have contacts. Instead, the person account record stores the information you'd typically save for business contacts, such as first name and last name. You can usually treat a person account like a contact. For example, you can invite a person account to a meeting or associate it with a campaign. For differences between person accounts and business accounts, see Person Account Behaviors.

> 📝 **Note:** In the Salesforce Help and other documentation, the word *account* by itself always refers to both business accounts and person accounts. We use the terms *business accounts* and *person accounts* when there are differences between the two types of accounts.

Person Account Behaviors

Person accounts are accounts that can also be used as contacts in many situations. However, there are key areas in which person accounts differ from business accounts or have unique considerations.

> 📝 **Note:** This release contains a beta version of person accounts in Lightning Experience that is production quality but has known limitations. For information on enabling person accounts for your organization, see Enable Person Accounts.

Salesforce Functionality	Person Account Behavior
Account Merge	Person accounts can be merged only with other person accounts. See Merge Duplicate Accounts.
Account Quick Create	On the accounts home page, the fields in the Quick Create area are based on whether the default account record type set on your profile is a person account record type or a business account record type.
Accounts	Person accounts can't have relationships with other accounts or with contacts. They can't be included in account hierarchies.
Activities	Person accounts can be associated with events or tasks using either the `Name` or `Related To` fields. As with contacts, person accounts can be invited to events.

Salesforce Functionality	Person Account Behavior
	For users to request a meeting with a person account, the `Email` field must be added to the Person Accounts page layout.
Campaigns	As with contacts, person accounts can be added to campaigns and have a Campaign History related list.
Cases	On cases, person accounts can be entered in the `Account Name` field, the `Contact Name` field, or both.
Chatter Feed Tracking	When you follow person accounts, you follow the account fields, but not the contact fields.
Communities and Portals	As with contacts, person accounts can be enabled as users for customer communities and portals Person Accounts can't be enabled as users for partner communities and portals.
Contact Roles	As with contacts, you can associate person accounts to accounts, cases, contracts, and opportunities using the Contact Roles related list. Similarly, you can associate contacts to person accounts using the Contact Roles related list.
Contacts	Unlike business accounts, person accounts can't have relationships with contacts.
Custom Objects	Custom objects with relationships to either accounts or contacts can be added as related lists on person accounts.
Data.com	Person accounts aren't supported by Data.com products and features.
Desktop Integration	Person accounts are supported by the following Salesforce integration features. • Lightning for Outlook • Salesforce for Outlook • Connect Offline Person accounts aren't supported by Lightning Sync.
Duplicate Management	Person accounts aren't supported by Data.com Duplicate Management.
Email	As with contacts, you can send individual emails and mass emails to person accounts.
ExactTarget	Person accounts are supported, but more configuration is required.
Field History	Account and contact fields that appear on person account records can be tracked using the account field history settings. Person account field history is then captured in the Account History related list, the Account History report, and field audit trails.
Fields	Most standard account and contact fields and all custom account and contact fields are available for person account page layouts. Some business account fields (such as `Parent Account` and `View Hierarchy`) and some contact fields (such as `Reports To`) are not supported for person accounts. See Person Account Fields. .

Salesforce Functionality	Person Account Behavior
Icons	In Salesforce Classic, person accounts have a person icon ( ), while business accounts have a folder icon ( ).
	In Lightning Experience, person accounts have a person with building icon ( ), while business accounts have building icon ( ).
	The person account icon can be added to search results, list views, and lookup dialogs by adding the `Is Person Account` field to the appropriate search layout or list view.
Import Wizards	Person accounts can be imported using the Data Import Wizard, as well as the individual import wizard for Person Accounts.
Lead Conversion	Leads that don't have a value in the `Company` field are converted to person accounts. Leads that do have a value in the `Company` field are converted to business account.
List Views	Person accounts appear in all account and contact list views, except the Recent Contacts list on the Contacts home page.
	Quickly see which records are person accounts by adding the `Is Person Account` field to the list of fields to display. To include or exclude person accounts from a list view, add the `Is Person Account` field to the filter criteria.
Mobile Configurations for Salesforce Classic	Salesforce Classic Mobile Configurations that include the account object automatically deliver person accounts and business accounts to users' mobile devices.
	Person accounts can be excluded from the configuration's data set using the criteria "*Is Person Account equals False*." To mobilize only person accounts, use the criteria "*Is Person Account equals True*." If a mobile configuration includes accounts but not contacts, users assigned to that configuration will see a Contacts tab in the mobile client application, and the tab will contain person accounts.
Packaging	Person accounts components and attributes can be included in managed and unmanaged packages.
Page Layouts	Person accounts have their own page layouts that can include account and contact fields, account custom links, and account and contact related lists.
	Person accounts page layouts do not support the `Reports To` and `Parent Account` fields. See Person Account Fields.
Pardot	Person accounts are supported, but additional configuration is required.
Partners	You can use the Partners related list to relate person accounts to each other. We recommend that you rename the Partners related list to reflect how your person accounts are connected.
Process Builder	Creating or editing a person account triggers the Process Builder, if applicable.
Record Types	Administrators can configure multiple record types for person accounts. A person account can only be changed to another person account record type.
Renamed Tabs and Standard Fields	To customize the names of tabs and fields that display on person account records, administrators need to customize the account and contact tabs and fields.
Salesforce1	For organizations that have enabled person accounts and Salesforce1, person accounts can be created, accessed, and managed within Salesforce1 for most features.

Salesforce Functionality	Person Account Behavior
Search	In Lightning Experience and Salesforce1, person accounts appear in both account and contact search results. In Salesforce Classic, person accounts appear only in account search results. To help users differentiate person accounts from business accounts in search results, administrators can add the `Is Person Account` field to the appropriate search layout.
Self-Service Portal	As with contacts, person accounts can be enabled as users for your Self-Service portal. Note: Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.
Sharing Settings	If you have enabled person accounts, the organization-wide default sharing for contacts is set to Controlled by Parent and is not editable. If your organization has customized your contact sharing settings and you want to enable person accounts, change your organization-wide default for contacts to Controlled by Parent, which removes all your contact sharing rules and manually shared contacts.
Social Accounts, Contacts, and Leads	As with contacts, you can link person accounts to social network profiles
Stay-in-Touch Requests	As with contacts, you can send individual and mass Stay-in-Touch requests to person accounts.
Storage	Person accounts count against both account and contact storage because each person account consists of one account as well as one contact.
Visual Workflow	Creating or editing a person account triggers flows created with Visual Workflow.
Workflow Rules	Creating or editing a person account triggers account workflow rules.

ENABLE PERSON ACCOUNTS

Person Account Considerations

Before enabling person accounts, consider the following.

- After you've enabled person accounts, you can't disable them.
- A single person account uses more storage space than a business account.
- Some AppExchange packages can't be used with person accounts. Before you enable person accounts, check AppExchange or contact the app builder to make sure that person accounts are compatible with the apps you need.
- Some Salesforce features work differently with person accounts. Review Person Account Behaviors for a list of differences between person accounts, and business accounts and contacts.

Prepare Your Organization for Person Accounts

Before enabling person accounts, prepare your sharing settings and record types.

> **Note:** Person accounts can't be turned off once they're enabled. We recommend testing your person account implementation in a trial, development, or sandbox environment before having person accounts enabled for your active Salesforce organization.

1. Create at least one record type for business accounts. Salesforce creates a record type for person accounts when they're enabled.
2. Set the organization-wide sharing setting for contact records to `Controlled by Parent.`
3. Give at least "Read" permission on contacts to all profiles that have at least "Read" permission for accounts.

Enable Person Accounts

To enable person accounts for your organization, contact Salesforce. After person accounts are enabled, assign them to profiles.

> **Note:** Person accounts can't be turned off once they're enabled. We recommend testing your person account implementation in a trial, development, or sandbox environment before having person accounts enabled for your active Salesforce organization.

1. Contact Salesforce to have person accounts enabled for your organization.
2. From Setup, enter `Person Accounts` in the `Quick Find` box, then click **Record Types**.
3. When Salesforce enables person accounts, it creates one person account record type. Optionally, create more person account record types for person accounts.
4. Assign one or more person account record types to profiles that require person accounts.

CONFIGURE PERSON ACCOUNTS

Optimize Person Accounts with These Recommended Configurations

Person accounts are ready to go when they're enabled, but a few tweaks make them work better for your organization. The procedures listed here are optional, and can be performed in any order at any time.

Customize the names of tabs and field labels

1. Rename the Accounts tab and the `business account` and `person account` fields to reflect your business use.

2. Rename the Contacts tab and the `business contact` field to reflect your business use. If your organization uses person accounts only, change the visibility setting for the Contacts tab to "Default Off" or "Hidden" to reduce user confusion.

3. Rename the Partners related list to "Related Accounts," "Relationships," or a similar phrase or term that reflects how your person accounts relate to one another.

4. Remove the `account site` field from the page layout for person accounts. Alternately, if your organization uses person accounts only, repurpose it as a unique identifier for person accounts. For example, you could rename the field "Client Number" and use it to store a number that uniquely identifies each person. By default, this field displays in many list views and other areas and can help differentiate between people with similar names.

Customize person account page layouts

1. From Setup, enter *Person Accounts* in the `Quick Find` box, then select **Page Layouts**.

2. Add contact fields and related lists to the page layout as needed.

Customize person account record types

When person accounts are enabled, a default person account record type is automatically created. You can modify this default person account record type, and you can also add more person account record types.

Add the `Is Person Account` field to rules

Add the Is Person Account field to rules such as:

- Workflow rules
- Assignment rules
- Escalation rules
- Field validation rules
- Territory assignment rules

  Note: When configuring lead assignment rules, create separate email notification templates for business accounts and person accounts. That way you can show only the fields that are supported for each type of account. For example, a person account email notification template does not need the `Company` field.

Add the person account icon to search results and lookup dialogs

The person account icon corresponds to the `Is Person Account` field. The icon visually distinguishes person accounts from business accounts in account lists and from business contacts in contact lists. If your organization works exclusively with person accounts, adding the icon is not necessary.

Add the person account icon and other person account fields as columns in public list views

Add these icons to the Accounts and Contacts tabs and for Mass Email and Mass Stay-in-Touch requests.

You can also configure the search criteria of public list views so that person accounts are included or excluded as appropriate.

Individual users must update their personal list views.

Customize public reports and customize public dashboards to include person account information

Individual users must update their personal reports and dashboards as well.

Customize partner roles for person accounts

Examples of customized partner roles include "Spouse," "Neighbor," "Attorney," and "Accountant."

Customize leads

Create lead record types for person accounts.

Create lead page layouts for business accounts and person accounts. Page layouts for leads that convert to business accounts must contain the `Company` field. Page layouts for leads that convert to person accounts must not contain the `Company` field.

> 📝 Note: Leads that don't have a value in the `Company` field are converted to person accounts. Leads that do have a value in the `Company` field are converted to business account.

Update integrations

For more information on the API, visit Salesforce Developers.

Test Your Person Account Setup

After you enable and configure person accounts, we recommend testing your setup to ensure that it's optimized for your organization. You can use this list as a starting point. If you made other custom configurations, don't forget to add tests for them to the list.

- Verify that each person account page layout correctly contains related lists for any associated custom objects.
- Verify that custom object page layouts correctly contain account lookup fields, if such relationships have been configured.
- Verify that workflow rules involving accounts trigger correctly.
- Verify that API-based integrations correctly create, update, and access person accounts and business accounts.
- Verify that leads correctly convert into person accounts and business accounts.
- Verify that account assignment rules correctly assign person accounts and business accounts to territories.

IMPORT DATA INTO PERSON ACCOUNTS

Importing Person Accounts

As an administrator, you can import person accounts for your organization by running the person account import wizard. The following sections describe how the wizard works.

> 📝 **Note:** An additional wizard not described in this guide allows individual users to import person accounts they own. For more information, see the online help.

IN THIS SECTION:

Import My Organization's Person Accounts

What Is Imported for Person Accounts?

Import My Organization's Person Accounts

With the Import My Organization's Person Accounts wizard, you can import person accounts that are owned by different users. To understand how person account records are matched to prevent duplicates, see What Is Imported for Person Accounts? on page 12.

> 📝 **Note:** If the label for person accounts has been renamed for your organization, the renamed label will appear in the import wizard itself and in the Tools area of the accounts home page, but not in the Setup tree. (Renamed labels do not appear in any pages in Setup.)

Follow these steps to import person accounts for your organization.

1. Launch the wizard
2. Prevent duplicate records
3. Specify owner and lookup relationships
4. Select record type
5. Upload your import file
6. Map fields
7. Confirm and submit your import
8. Complete your import

> 📝 **Note:** The import wizard is dynamic; it displays different screens depending on what you are importing and the setup of your organization.

Launch the wizard

To import person accounts for your organization:

1. From Setup, enter "Import Person Accounts" in the `Quick Find` box, then select **Import Person Accounts**.

   Alternatively, click **Import My Organization's Person Accounts** in the Tools area of the accounts home page.

2. For best results, perform all of the steps provided on the introductory page.

3. Click **Start the Import Wizard!** to begin your import.

Prevent duplicate records

1. The import wizard can compare the records in your import file with existing records in Salesforce in order to prevent duplicate records from being created as a result of your import. Indicate whether you would like to prevent duplicate records from being created. You must select `Yes` in order to update existing records.

2. If you choose `Yes`, then additional choices will appear:

- Choose the field that you are using to match existing records in Salesforce with records in your import file. The `External ID` option is disabled if no external ID fields have been created for your records.

- Choose what you want to happen if matches are found—only import new records, only update existing records, or update existing records and import new ones.

  📝 **Note:** If you have chosen to match by `Salesforce ID`, you can only update existing records; you cannot import new ones.

3. Click **Next**.

Specify owner and lookup relationships

1. Specify the field in your import file that contains person account owners.

  When you choose "Name," the following formats are valid:

- First name followed by last name
- Last name followed by first name
- Alias
- Username

2. Records can have custom fields that create lookup relationships with other records. If you have included lookup fields in your import file, then check the corresponding boxes.

  📝 **Note:** Any related records must already exist in Salesforce before proceeding. Related records will not be updated during your import even if your import file contains different values for fields on those related records.

3. Click **Next**.

Select record type

1. Choose the record type that you want to assign to the records in your import file.

2. If you are inserting new records and updating existing records at the same time, then choose whether to override the record types of existing records.

3. Click **Next**.

Upload your import file

1. Click **Browse...** to provide the location of your import file.

2. Choose the character encoding of your import file. In most cases, you can accept the default value.

3. Make additional settings depending on the setup of your organization, such as whether workflow rules will be triggered and the language of the records in the import file.

4. Click **Next**.

Map fields

1. Map the fields in your import file to the appropriate Salesforce fields by matching the fields on the left, which includes all the columns in your import file, with the appropriate Salesforce field on the right. If the column labels in your import file exactly match field labels in Salesforce, the wizard automatically maps those fields for you. However, if two or more of your file's column labels are identical matches with a field in Salesforce, you must map the fields manually.

   Note: Some Salesforce fields cannot be updated using import, for example, the `Created Date` and `Last Modified Date`. So even though you may be using an exported report as your import file, some of the Salesforce fields in your file cannot be mapped.

2. Click **Next**. The import wizard warns you if you have not mapped all of the fields in your import file. Unmapped field values are not imported.

Confirm and submit your import

1. Read any warning messages that the import wizard displays. Optionally, click **Previous** to return to earlier steps and resolve potential problems.

2. Click **Import Now!** to submit your import request to Salesforce.

Complete your import

1. A message indicates approximately how long the import will take. When the import operation is finished, a message from Customer Support will be sent to the email address shown.

2. Click **Finish** to exit the wizard.

3. To monitor the status of your pending import, from Setup, click **Monitoring** > **Imports**.

What Is Imported for Person Accounts?

The Data Import Wizard prevents creating duplicate person accounts by matching records according to one of the following fields: `Account Name`, `Salesforce ID`, `Email`, or an external ID field. In your import file, include a column for the field that you're using for record matching.

Note: Your administrator could have renamed "person account" to another term. If so, the Data Import Wizard refers to the new name.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Matching by Name

When you select this option, the Data Import Wizard detects existing records in Salesforce that have the same name. This type of matching is not case-sensitive. For example, names that begin with a capital letter are matched with the same name that begins with a lowercase letter. If necessary, scan and standardize your record names before performing the import to prevent unintended matches.

Matching by Salesforce ID

A Salesforce ID is a system-generated, case-sensitive string of 15 or 18 letters and numbers that uniquely identifies each Salesforce record. When you select this option, the Data Import Wizard detects existing records in Salesforce that have the same Salesforce ID. You can obtain Salesforce IDs by running reports that include the ID field of the record.

Matching by Email

With this option, records in your import file are matched with existing records in Salesforce according to the exact value in the `Email` field.

Matching by External ID

An external ID is a custom field that has the External ID attribute, meaning that it contains unique record identifiers from a system outside of Salesforce. When you select this option, the Data Import Wizard detects existing records in Salesforce with external IDs that match those in the import file. This operation is not case-sensitive. For example, "ABC" is matched with "abc". However, if the external ID field also has the case-sensitive Unique attribute, uppercase and lowercase letters aren't considered identical.

Scan and standardize your external ID values before performing the import to prevent unintended matches.

If the Data Import Wizard finds duplicate records, only the first three duplicate records are reported in the confirmation email.

Ignoring or Updating Matching Records

When the Data Import Wizard detects existing records in Salesforce that match according to your chosen field, you can choose one of these actions.

- **Add new records**—If records in your file are new and don't match existing records, insert them into Salesforce. Ignore records in your file that match existing records, and do nothing to the existing records.
- **Update existing records**—If records in your file match existing records, update the existing records. Ignore records in your file that don't match existing records, and don't insert them as new records.
- **Add new and update existing records**—If records in your file are new and don't match existing records, insert them into Salesforce. If records in your file match existing records, update the existing records.

CONVERT BUSINESS ACCOUNTS TO PERSON ACCOUNT

Convert Business Accounts to Person Accounts

There's no easy way to convert business accounts to person accounts, but it can be done.

To complete the conversion, you'll need to export a file containing the accounts and contacts to be converted, manually alter some data, and then import the it back into Salesforce.

💡 **Tip:** We strongly recommend testing your conversion in a sandbox before importing altered data into your production organization. For more information on sandboxes, visit Sandbox Overview in the Salesforce online help.

Considerations for Converting Business Accounts to Person Accounts

Review these gotchas before converting business accounts to person accounts.

- After a business account is converted to a person account, it can't be associated with any contacts.
- To prevent duplicate or conflicting data in the person account, some original data will be deleted from some account or contact fields during conversion.
    - Account Name on the Account.
    - Phone, Fax, Description, Created By info, Last Modified info, and Last Activity on the Contact.

    To retain the data in these fields, create a custom fields for each original field you wish to retain. Then, map the original field to the custom field during the import part of the conversion process. Add the custom fields to the Person Account page layout to make the data visible on the person account.
- You can't convert a business account to a person account if it was ever portal enabled.
- You can use version 8.0 or later of the API to separate person accounts into individual business account and business contact records.

💡 **Tip:** We strongly recommend testing your conversion in a sandbox before importing altered data into your production organization. For more information on sandboxes, visit Sandbox Overview in the Salesforce online help.

Prepare Business Accounts to be Converted to Person Accounts

Each account and contact that you plan to convert to must meet these conditions.

1. Each account must have one contact. It can't have more than one.
2. The account and contact must have the same record owner.
3. The account and contact must have the same currency values.
4. The Parent Account field on the Account must be blank.
5. The Reports To field on the Contact must be blank.
6. The Account is not set as a Parent Account for any other accounts.
7. The Contact is not set as a Reports To for any other contacts.

Convert Business Accounts to Person Accounts

Convert business accounts and associated contacts to person accounts using data export and import tools.

> 💡 **Tip:** We strongly recommend testing your conversion in a sandbox before importing altered data into your production organization. For more information on sandboxes, visit Sandbox Overview in the Salesforce online help.

1. Enable person accounts.

2. Backup your data.

3. Ensure that all accounts and contacts to be converted meet the prerequisites listed in Prepare Business Accounts to be Converted to Person Accounts.

4. Using the Data Loader, export account and contact data.

5. Open the export file using a tool such as Microsoft Excel ©.

6. Optionally, delete from the export file all records except the accounts and contacts included in the conversion.

7. Change the record type for each account you will to convert to the desired Person Account record type.

8. Use the Save As function of your editing tool to the export file as a .csv (comma separated value) file.

9. Import the file using the Data Loader. Optionally, map fields that will be deleted to custom fields to preserve original data.

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