Getting Started with Relationship Groups
Understanding & Implementing

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RELATIONSHIP GROUPS OVERVIEW

What Are Relationship Groups?

Relationship groups are custom object records used to store collections of accounts. For example, you can use relationship groups to manage the following:

- A household of people who reside at the same address
- An extended family consisting of multiple generations of relatives
- A professional group such as a medical practice or a law firm
- The trustees and beneficiaries of a trust

The accounts that you add to relationship groups are called *relationship group members*. For more information, see About Relationship Group Members on page 3.

Who Can Use Relationship Groups?

✎ **Note:** Relationship groups are only available upon request to Salesforce for Wealth Management customers. Note that the Relationship Groups tab may be named "Households" in Salesforce for Wealth Management organizations. To enable relationship groups, contact your Salesforce representative.

Your organization must have implemented person accounts before you can use relationship groups.

Your administrator can enable relationship groups by installing the Relationship Groups custom app.

What Are the Benefits of Relationship Groups?

Relationship groups allow you to:

- Track the familial and professional roles of different relationship group members
- Assign primary and secondary designations to the two most important members of a relationship group
- View roll-up related lists of all activities for the members of a relationship group
- View roll-up related lists of the custom objects that are related to the accounts in a relationship group

RELATIONSHIP GROUP FIELDS

A relationship group custom object has the following default fields, listed in alphabetical order.

Name	Description
Description	A text description of the relationship group. Up to 255 characters are allowed.
Primary Name	The name of the primary relationship group member.
Secondary Name	The name of the secondary relationship group member.
Total Members	The total number of members in the relationship group.

To add custom fields to relationship groups, from the object management settings for relationship groups, go to the fields area, then click **New** in the Custom Fields & Relationships section.

ABOUT RELATIONSHIP GROUP MEMBERS

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What Are Relationship Group Members?

The accounts that you add to relationship groups are called *relationship group members*. Like relationship groups, relationship group members are custom objects. Each relationship group member record represents an association between an account and a relationship group. For example, if you add the account "Mary Smith" to the relationship group "Smith Family," a relationship group member record is created that links Mary Smith to the Smith Family.

Relationship group members are unique because they have two master-detail relationships: one with accounts and another with relationship groups. When discussing these master-detail relationships, accounts and relationship groups are sometimes referred to as the "parents" of relationship group members.

What Are the Limits on Relationship Group Members?

You can add a given account to up to 200 relationship groups. For example, an account "Joseph Brown" who is an attorney may be a member of several relationship groups—in some cases as an attorney, in other cases as a family member.

You can add up to 20 accounts to a particular relationship group. For example, a relationship group that represents a large extended family including grandparents, children, and grandchildren cannot have more than 20 relationship group members.

In a particular relationship group, you can specify only one relationship group member as primary, and only one relationship group member as secondary. In addition, you cannot add the same account more than once to a particular relationship group.

Where Can I View Relationship Group Members?

The Relationship Group Members related list displays on both the relationship group detail page and the account detail page. On the relationship group detail page, the related list summarizes the accounts that are members of the given relationship group. On the account detail page, the related list summarizes the relationship groups of which the given account is a member.

Relationship Group Member Fields

Relationship group members have the following fields.

Field Name	Description
Account	The name of the account.
Role	The familial, professional, or other role that an account has in a relationship group - for example, Client, Spouse, Child, Attorney, or Accountant. Your administrator defines the available values in this picklist.
Primary	Designates an account as the most important member of the relationship group. Only one relationship group member can be specified as primary.
Secondary	Designates an account as the second-most important member of the relationship group. Only one relationship group member can be specified as secondary.
Include in Roll-up	Specifies whether the activities and custom objects of an account display in related lists on the relationship group detail page.
Priority	Does not display in the relationship group wizard, but is available as a column in the Relationship Group Members related list on account and relationship group detail pages. This column displays the primary (🧑) or secondary (🧑) icon as appropriate next to account names.
Unique Key	This is a system field that prevents duplicate records. It does not display to users in Salesforce but is visible in the Force.com API. This field should be treated as read only; attempts to modify it through the API will be ignored.

📝 **Note:** When you merge accounts, you also merge the accounts' memberships in relationship groups.

RELATIONSHIP GROUP CONSIDERATIONS

To make the most of relationship groups and relationship group members, review the notable behaviors and limitations below.

Relationship Group Considerations

Relationship groups:

- Support roll-up related lists for activities and custom objects only.
- Are completely separate from the Partners related list on accounts.
- Do not have directly associated activities, notes, or attachments.
- Only support required custom fields that are configured with a default value. Such custom fields will display on relationship group detail and edit pages, but not in the relationship groups wizard.
- Only support validation rules on custom fields that were added after the Relationship Group managed package was installed.
- Cannot be renamed to a different name than "relationship group," because they are a custom object in a managed package.
- Can be created and edited through the relationship group wizard regardless of field-level security settings on the `Description` field.

Relationship Group Member Considerations

Relationship group members:

- Are limited to a maximum of 20 per relationship group.
- Cannot be imported via the import wizard for custom objects.
- Do not support tagging.
- Have the division of the parent relationship group.
- Are owned by both the parent relationship group and the parent account.
- Do not support validation rules.
- Do not support universally required fields.
- Cannot be renamed to a different name than "relationship group member," because they are a custom object in a managed package.
- Can have the fields `Primary`, `Secondary`, and `Include in Roll-Up` edited through the relationship group wizard even when the field-level security on those fields is "read-only."
- Cannot be included in workflow rules or approval processes.
- Cannot be used in Salesforce to Salesforce.
- Are not supported in Connect Offline.
- Are only supported in API version 11.0 and later. In the API, using the `upsert` call on relationship group members is not supported.

INSTALL AND IMPLEMENT RELATIONSHIP GROUPS

Obtaining the Relationship Groups Custom App

The relationship groups custom app comes preinstalled in most Salesforce for Wealth Management organizations. If your Salesforce for Wealth Management organization does not have the relationship groups custom app, contact Salesforce to request it.

Verifying the Installation of the Relationship Groups Custom App

If the relationship groups custom app has been installed in your organization, the Relationship Groups option displays in the Force.com app menu.

In addition, administrators can use the following procedure to verify that the relationship groups custom app was successfully installed:

1. From Setup, enter `Apps` in the `Quick Find` box, then select **Apps** and verify that the relationship groups custom app is present and has the ⬇ Managed - Installed icon.

2. From your management settings for custom objects, verify that the relationship group and relationship group member objects are present and that each has the ⬇ Managed - Installed icon.

Configuring the Relationship Groups Custom App

Perform the following implementation tasks to configure the custom app. If the relationship groups custom app came pre-installed with Salesforce for Wealth Management, some of these configurations may already be set in your organization.

Customizing Account Page Layouts

From the object management settings for accounts, go to Page Layouts, then remove the following related lists from the appropriate account page layouts.

- Relationship Groups (Primary Account)
- Relationship Groups (Secondary Account)

Customizing Person Account Page Layouts

From the object management settings for person accounts, go to Page Layouts, then edit the appropriate person account page layouts.

1. In the Related List Section, drag and drop to edit the following related lists:
   - Add **Relationship Group Members**
   - Remove **Relationship Groups (Primary Account)**
   - Remove **Relationship Groups (Secondary Account)**

2. Edit the Relationship Group Members related list as follows:

- At minimum, include the following fields: `Relationship Group Member: Role`, `Relationship Group Member: Priority`, `Relationship Group Member: Include in Roll-Up`
- Remove the standard **New** button
- Add the custom **New** button

Setting Context-Sensitive Help for Relationship Groups

By default, the **Help for this Page** links on relationship group pages open help content about custom objects in general. To redirect those links to help topics that specifically describe relationship groups:

1. Go to the management settings for custom objects.
2. Click **Relationship Group** to open its custom object definition.
3. In the Custom Object Definition Detail section, click **Edit**.
4. For `Context-Sensitive Help Setting`, choose `Open a window using a custom s-control`.
5. For `Custom S-Control`, choose `Relationship Groups Help`.
6. Click **Save**.

> 📝 Note: Repeat this procedure for the Relationship Group Member custom object. This sets an appropriate context-sensitive destination for the help links on the Relationship Group Member related lists.

Overriding Standard Relationship Group Buttons

To customize the buttons on the relationship group detail page:

1. Go to the management settings for custom objects.
2. Click **Relationship Group** to open its custom object definition.
3. In the Buttons, Links, and Actions section, click **Edit** next to **New** and replace that button with the `NewHousehold` s-control.

Customizing Relationship Group Search Layouts

To customize the search layouts for relationship groups:

1. Go to the management settings for custom objects.
2. Click **Relationship Group** to open its custom object definition.
3. In the Search layouts section, click **Edit** to modify the appropriate search layout. At minimum, we recommend setting the following columns for search results:
   - Relationship Group Name
   - Primary Account
   - Secondary Account
   - Last Modified By

Customizing Relationship Group Page Layouts

To customize the layout of the relationship group detail page, from the object management settings for relationship groups, go to Page Layouts, then click **Edit** next to the appropriate page layout name. Edit the page layout as follows:

1. Remove the **Clone** button from the detail page.
2. Edit the Open Activities related list as follows:
   - Remove the standard **New Task** and **New Event** buttons
   - Add the custom **New Task** and **New Event** buttons
3. Edit the Activity History related list as follows:
   - Remove the standard **Log a Call**. **Mail Merge**. **Send an Email**, **Request Update**. and **View All** buttons

- Add the custom **Log a Call**, **Mail Merge**, and **Send an Email** buttons

4. In the Relationship Group Members related list, include the following fields, at minimum:

- `Relationship Group`
- `Role`
- `Priority`
- `Include in Roll-Up`

Overriding Standard Relationship Group Member Buttons

To customize the buttons on the relationship group member detail page:

1. Go to the management settings for custom objects.

2. Click **Relationship Group Member** to open its custom object definition.

3. In the Buttons, Links, and Actions section, click **Edit** next to **New** and replace that button with the `Edit Household Members` s-control.

After configuring the relationship groups custom app, verify that a Relationship Groups option displays in the Force.com app menu.

> 📝 Note:
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> - In some cases, the custom app and its custom objects may have the label "Households" instead of "Relationship Groups" throughout. Whatever the labels are, they cannot be changed because the app is a managed package.
> - Installing the Relationship Groups custom app may cause an error if your organization has fewer than 21 account records. You may ignore this error and continue the installation process.
> - For all installations, the API names of the custom objects begin with the namespace prefix `household__`.
> - The Relationship Group Member object is only supported in API version 11.0 and later.

SEE ALSO:

Salesforce Help: Find Object Management Settings

TESTING THE RELATIONSHIP GROUPS PACKAGE

The relationship groups managed package provides unit tests that run when you install the package in your sandbox or production organization. In some cases, a component like an Apex trigger, validation rule, workflow rule, or custom field prevents the unit tests from completing successfully.

If the unit tests fail, do the following before running the tests again:

- Install the latest version of the relationship groups managed package. The functionality of the new version is the same as the older version except the unit tests have been enhanced. Contact Salesforce and request the latest version of the package (not available on the AppExchange).
- Deactivate components that prevent account, household, or household member objects from being edited or deleted. Apex triggers are a common cause of failed unit tests.

  To ensure the relationship groups package runs successfully in your organization, the unit tests attempt to edit and delete some account, household, and household member objects. These tests do not permanently modify your organization's data. If a platform element prevents these objects from being edited or deleted, the unit tests fail.