Setting Up Person Accounts

Salesforce, Winter '18

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ABOUT THIS GUIDE

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

By default, Salesforce accounts are business accounts, which are used to store information about companies or other entities. Person accounts extend the standard business-to-business account functionality by allowing you to store information about individual consumers. You can use both business accounts and person accounts in the same org.

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 Trailblazer 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 accounts to store information about customers or individuals you do business with. There are two types of accounts. Business accounts store information about companies. Person accounts store information about individual people.

📝 **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.

EDITIONS

Business accounts available in: both Salesforce Classic and Lightning Experience

Business accounts available in: **All** Editions

Person accounts available in: Both Salesforce Classic and Lightning Experience

Person accounts available in **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Person Accounts

Person accounts store information about individual people by combining certain account and contact fields into a single record.

📝 **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.

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Considerations for Using Person Accounts

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 and contacts, or have unique considerations.

Salesforce Functionality	Person accounts Behavior
Account Merge	As with merging other kinds of records, person accounts can be merged only with other person accounts. You can't merge person accounts that are enabled as portal or community users. See Merge Duplicate Accounts.
Account Quick Create	On the accounts home page in Salesforce Classic, 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 be included in account hierarchies.
	Person accounts can't have direct relationships with other accounts or contacts. You can, however, use Contacts to Multiple Accounts to create indirect relationships between a person account and another person account, business account, or contact.
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.
	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.
	If you create a Contact related list based on a custom lookup relationship, the **Add to Campaign** row-level action doesn't show up for person accounts. Click **View All** to see the full related list and access the Add to Campaign mass action. This applies to Lightning Experience and Saleforce1. (The Add to Campaign action isn't available in Salesforce Classic.)
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.

Salesforce Functionality	Person accounts Behavior
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 because partners represent companies, not individuals.
Contacts	Unlike business accounts, person accounts can't have direct relationships with contacts. You can, however, use Contacts to Multiple Accounts to create indirect relationships between a person account and a contact.
Contacts to Multiple Accounts	#shared_contacts_overview__shared_contacts_overview works with person accounts. That means a person account can be either a related contact on a business account or a related account on a contact. A person account can also be related to another person account as either a related contact or related account. Person accounts are always indirectly related to other accounts or 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 in Data Integration, Data.com Prospector, or Data.com Clean.
Desktop Integration	Person accounts are supported in the following Salesforce integration features. • Lightning for Outlook • Salesforce for Outlook • Connect Offline Person accounts aren't supported in Lightning Sync.
Duplicate Management	Duplicate rules and the Potential Duplicates component support person accounts.
Email	As with contacts, you can send individual emails and mass emails to person accounts.
Encryption	When Person Accounts are turned on, encrypting some Account fields encrypts the equivalent Contact fields, and vice. See the Salesforce Shield Platform Encryption Implementation Guide.
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 some contact fields (such as `Reports To`) are not supported for person accounts. See Account Fields.
Geocodes	Geocodes for addresses can't be added to person accounts using Data.com integration rules.
Icons	In Salesforce Classic, person accounts have a person icon ( ), while business accounts have a folder icon ( ).

Salesforce Functionality	Person accounts Behavior
	In Lightning Experience, person accounts have a person with building icon (), while business accounts have building icon ().
	Person accounts can be denoted in search results, list views, and lookup dialogs by adding the `Is Person Account` field to the appropriate search layout or list view.
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.
Lightning Pages	See Page Layouts
List Views	Person accounts appear in all account and contact list views, except the Recent Contacts list and the Recently Viewed related 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.
Opportunity Contact Roles	As with contacts, you can associate person accounts to opportunities using the Contact Roles related list.
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.
	When you create a Lightning page for accounts and assign it as the default for either an org or an app, that page becomes the org or app default for both business accounts and person accounts. To display a custom record page for person accounts, create a custom account record page, then assign it to the person account record type.
Pardot	Person accounts are supported, but more configuration is required.
Partners	In Salesforce Classic, 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 processes created with the Process Builder.
Quick Actions	When creating custom quick actions, fields specific to person accounts (such as Email or Mobile) aren't available in action layouts for the Update a Record action type.
Record Types	Administrators can configure multiple record types for person accounts. From the UI, you can change an account's record type from a business account to a business account or from a person account to a person account. However, to change an account's record type from a business account to a person account, or vice versa, you must use the API.
Renamed Tabs and Standard Fields	To customize the names of tabs and fields displayed on person account records, administrators must customize the account and contact tabs and fields.

Salesforce Functionality	Person accounts Behavior
Search	In Lightning Experience and the Salesforce app 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 must be set so that either Contact is **Controlled by Parent** or both Account and Contact are **Private**.
Social Accounts, Contacts, and Leads	As with contacts, you can link person accounts to social network profiles
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 Considerations for Using Person Accounts 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 the object management settings for person accounts, go to 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

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:

[What Is Imported for Person Accounts?](#)

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.

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 values in the import file.

- This operation isn't 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.

- External IDs can be of type text, number, email, or auto-number. If the external ID type is auto-number, it isn't available for matching, but it can be used to look up the parent record if it contains the external ID.

- External ID values should be standardized before performing the import to prevent unintended matches.

- Multiple records with the same External ID within a file aren't uploaded.

- Multiple external ID fields can be used to find matching records in Salesforce when using the Data Import Wizard.

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. You can also convert person account to business accounts using a similar procedure.

> **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. Review the considerations for converting business accounts to person accounts.

2. Back up 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. Get the Record ID for the Person Account Record Type that you want to use for the converted records.

5. Using the Data Loader, export the account records you want to convert.

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

7. In the export file, delete all records that you *don't* want included in the conversion.

8. In the export file, create a column for Record Type. Then insert the applicable Record ID for the Person Account Record Type for each account you want to convert.

9. If you want to preserve values for the fields that are deleted during conversion, create custom fields for each original field you want to retain.

   The custom field can be on the Account or Contact object, but the Contact object is recommended.

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

11. Import the file using the Data Loader.

    If you created custom fields to preserve the deleted field values, map the deleted fields to your custom fields.

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