



NPSP: NPSP and Person Accounts

This article addresses some of the issues with using the NPSP alongside Person Account, touches on what Person Account actually are, and how you can remedy a situation in which Person Account have been enabled.

Person Accounts - An Overview

What are Person Accounts?

Person Accounts (PAs) provide one method for organizations needing to track "Business to Consumer" (B2C) relationships in Salesforce.com. Person Accounts allow you to utilize the existing Account object to model the relationship side-by-side with the standard "Business to Business" (B2B) Salesforce model. Person Accounts introduce a new 'Account Record Type' to your Salesforce.com instance. This record type (called 'Person Account') provides new fields on the Account object that wouldn't otherwise be accessible to your organization. Person Accounts are **not** enabled by default, and instead need to be provisioned by Salesforce.com Support by logging a case. When a new Person Account is created, a 'matching' Contact is created, but is not accessible to the user or Person Account.

What Are Person Accounts - Technical

Person Accounts consist of three fundamental components. A record type for separating their functionality from the standard SFDC Account object. A set of fields which are automatically added to the Account object and treated as standard fields. And finally, a 'hidden' Contact object that cannot be accessed, but provides Person Accounts with many (though not all) of the same functions as the standard Contact object. When Person Account are active, the following fields are automatically added as standard fields to the Account object:

<i>PersonTitle</i>	<i>PersonOtherStreet</i>	<i>PersonOtherState</i>	<i>PersonOtherPostalCode</i>
<i>PersonOtherPhone</i>	<i>PersonOtherCountry</i>	<i>PersonOtherCity</i>	<i>PersonMobilePhone</i>
<i>PersonMailingStreet</i>	<i>PersonMailingState</i>	<i>PersonMailingPostalCode</i>	<i>PersonMailingCountry</i>
<i>PersonMailingCity</i>	<i>PersonLeadSource</i>	<i>PersonLastNameLocal</i>	<i>PersonLastCUUpdateDate</i>

PersonLastCURequestDate *PersonHomePhone* *PersonHasOptedOutOfFax* *PersonHasOptedOutOfEmail*
PersonFirstNameLocal *PersonEmailBouncedReason* *PersonEmailBouncedDate* *PersonEmail*
PersonDoNotCall *PersonDepartment* *PersonContactId* *PersonBirthdate*
PersonAssistantPhone *PersonAssistantName* *IsPersonAccount*

Considerations for Working With Person Accounts

Person Accounts are a supported function of the Salesforce.com platform, but are not considered 'standard' functionality. As such, the feature has several known drawbacks, and is not slated for additional enhancements in FY12. Some (though not all) areas of concern related to Person Accounts include:

- Feature Implementation - Person Accounts implementation of Contacts/Person related features may not necessarily coincide with the full platform release. As an example, Social Contacts (the ability to natively link Contact records to Twitter, Facebook and LinkedIn) will not be available for Person Accounts until at least one full release after their Winter '12 debut
- Special Consideration for Lead Conversion - As leads normally convert directly to Contacts and Accounts, special consideration needs to be taken when working with Lead Conversion in a PA environment.
- Account-Contact Cross Object Formula Fields - Implementation of formula fields at the Account level viewing Contact fields is not supported for PAs without additional workarounds.
- AppExchange Compatibility - Person Accounts need to be explicitly supported by AppExchange apps. It is important to check with the developers responsible for any needed applications prior to implementing for Person Accounts.
- Search - Person Accounts are modeled as an Account object in Salesforce. Because of this, they are not index-able as Contacts, and will not be identified when searching for Contact records.
- Contact-PA Interaction - Several considerations for Contact-PA interaction are important to understand prior to implementing.
 - Standard Contact Sharing behavior is not available for PAs
 - PAs can only be merged with other PAs, not existing Contacts
 - Contacts cannot be directly converted to PAs
 - PA DML does not activate Contact triggers
- Storage Considerations - PAs are considered two SFDC records. As such, each PA record requires double the storage of a comparable Contact record (min. 4 KB v. 2 KB)=
- ISV Considerations - When developing for managed packages, Person Accounts are not available as a packagable component, and must be independently enabled for installing organizations.
- Content Delivery - Content Delivery is not currently available for Person Accounts
- Visibility & Permissions - Visibility is tied directly to the Account object. Special consideration will be needed prior to implementing Role Hierarchies and record sharing when utilizing Person Accounts.
- Campaigns & Reporting - Add-to-Campaign functionality is not available for non Contact-Account recordtypes. (The PA Account record does not automatically join the underlying Contact)
 - Outlook Sync - Special consideration is needed when using the Connect for Outlook. Person Accounts are not directly creatable from Connect to Outlook. More information is available in the resources below.

Person Accounts - Disabling/Removing

Person Accounts cannot be disabled once enabled for your organization. While many of the features and recordtypes can be hidden if required, any conversion to a non-PA system will require manual data manipulation, there is no direct conversion available. There are two approaches to dealing with Person Account in an organization that would like to not use them:

1. Applying for a new Salesforce.com organization and requesting a license transfer. This approach will require you to migrate any existing data from your current system into the new Salesforce instance during the trial period.
2. You can 'hide' many of the Person Account-related changes to your org from your users. Because Person Accounts are a record type, by removing the ability of profiles to access the record type, you can in effect 'disable' Person Accounts. However, any existing data would need to be migrated, and special care would need to be taken during integrations, data loading, API access, etc. to not utilize any of the special Person Account-related fields.



(/_ui/core/userprofile/UserProfilePage?u=00580000003egB0AAI) contributed by Kevin Blais (/_ui/core/userprofile/UserProfilePage?u=00580000003egB0AAI) salesforce.com



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