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NPSP: What is an Account Model?

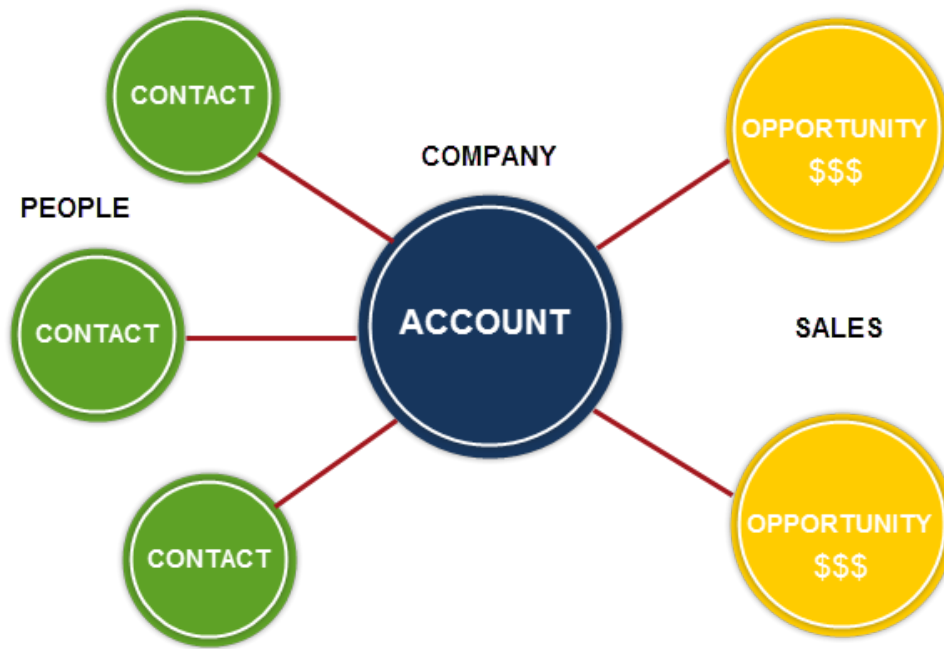
The Nonprofit Success Pack supports three different account models. For NPSP 3.0 and later, the Household Account model is the preferred account model.

This article contains these topics:

- What is an Account Model?
- Household Account Model
- 1-to-1 Account Model
- Individual ("Bucket") Account Model
- Change My Account Model

What is an Account Model?

Salesforce was originally designed as a "Business-to-Business" (B2B) application to help companies improve their sales processes, and by extension maximize their sales. In the traditional B2B scenario, every company keeps track of their accounts (i.e. the other companies or businesses they are selling to). Each account has people associated with it (contacts), as well as, for lack of a better word, "deals" (opportunities). How all of these things relate to and interact with each other in Salesforce is known as an *account model*.

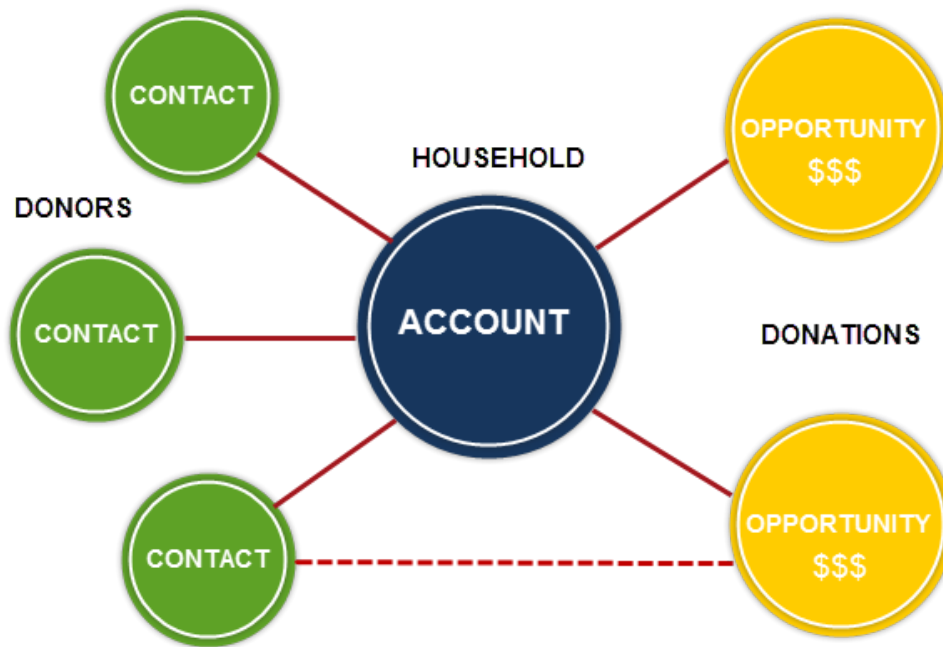


In the nonprofit world, however, we don't really keep track of companies and deals. Instead, we keep track of households and donations. Over time, the attempts to force nonprofits to conform to Salesforce's business logic has presented certain challenges. Chief among these has been Salesforce's requiring you to fit your relationships between households, donors, and donations into some sort of account model.

With the Household Account model, however, we think we've found a great solution. The Nonprofit Success Pack still supports two other account models (the 1-to-1 model, and the Individual, or "Bucket" model). These are in effect legacy account models that we've built along the way. You can read more about those down below (if you really want to).

Household Account Model

The Household Account model, available in Nonprofit Success Pack and in Nonprofit Starter Pack version 3.0 and later, is very closely aligned to the standard Salesforce account model. In the Household Account model, the standard Salesforce Account object acts as the household, with numerous contacts (donors) and opportunities (donations) associated with it. **The Household Account model is the default account model for Nonprofit Success Pack and in Nonprofit Starter Pack version 3.0 and later, and is the account model that Salesforce.org strongly recommends.**



You create a new Household Account by creating a new contact (/articles/Resource/NPSP-Add-or-Remove-a-Contact) in Salesforce. That is to say, whenever you create a new Contact record, Salesforce automatically creates a new Household for you. By default, Salesforce uses a naming convention for the new Household that aligns with the name of the new Contact. In the Contact Details section of your Contact record, it looks like this:

Contact Detail		Edit	Delete
▼ Contact Details			
Name	Jennifer Johnston		
Account Name	<u>Johnston Household</u>		
Primary Affiliation ?			
Title			

The Household Account model supports many sophisticated features, including Contact management for multiple Household members, and address management for things like seasonal addresses. Additionally, the Household Account model allows for "cleaner" relationships between objects in Salesforce's relational databases. For example donations can relate to both a Household and a Contact without having to "go out" to other objects, as in previous models.

NOTE: The Household Account model also supports organizational accounts (for example, other businesses, nonprofits, religious organizations, and so on), which you distinguish from household accounts by setting a different record type. While organizational accounts can contain direct Contacts, we recommend that you include all of your Contacts as members of a Household Account, and then associate them with the Organization Account through the Primary Affiliation option.

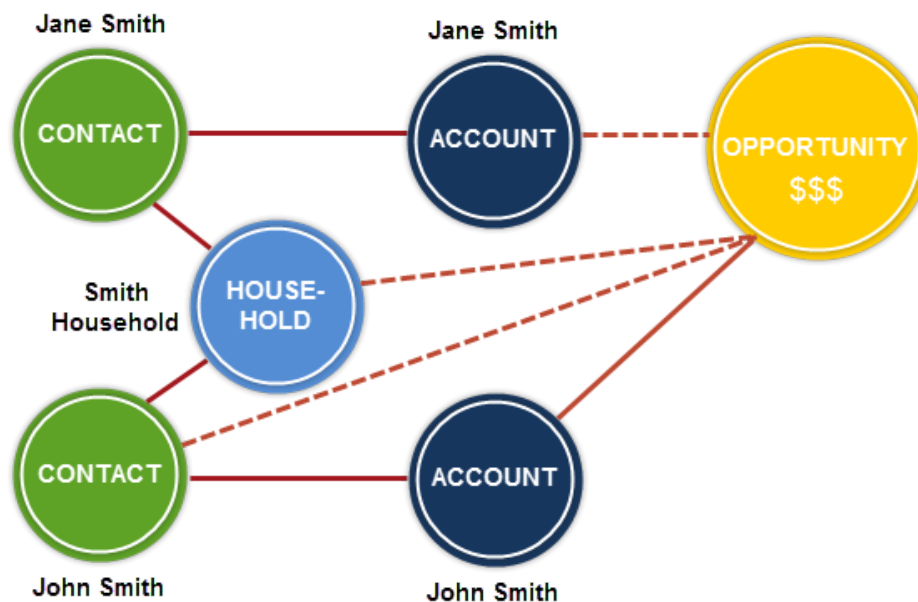
1-to-1 Account Model

The 1-to-1 account model works by creating an Account object for each Contact you create (i.e. "1 contact, 1 account"). The Account is automatically created when you create a new Contact, and the name of the new Account is identical to the name of the new Contact. The Account object itself, however, acts "invisibly" behind the scenes, and exists for the sole purpose of conforming to the standard Salesforce Account model (which requires all Contacts be associated with an Account).

In the Contact Details section of your Contact record, it looks like this:

Contact Detail		Edit	Delete
▼ Contact Details			
Name	Jennifer Johnston		
Account Name	<u>Jennifer Johnston</u>		
Primary Affiliation ?			
Title			

In the 1-to-1 account model, you must create households by joining contacts together through a separate Household object, which is provided with the NPSP. Opportunities (donations) look like they are simply associated with Households and Contacts, but they are also "traveling through" the 1-to-1 Account.



The 1-to-1 account model is a legacy account model, and is no longer recommended.

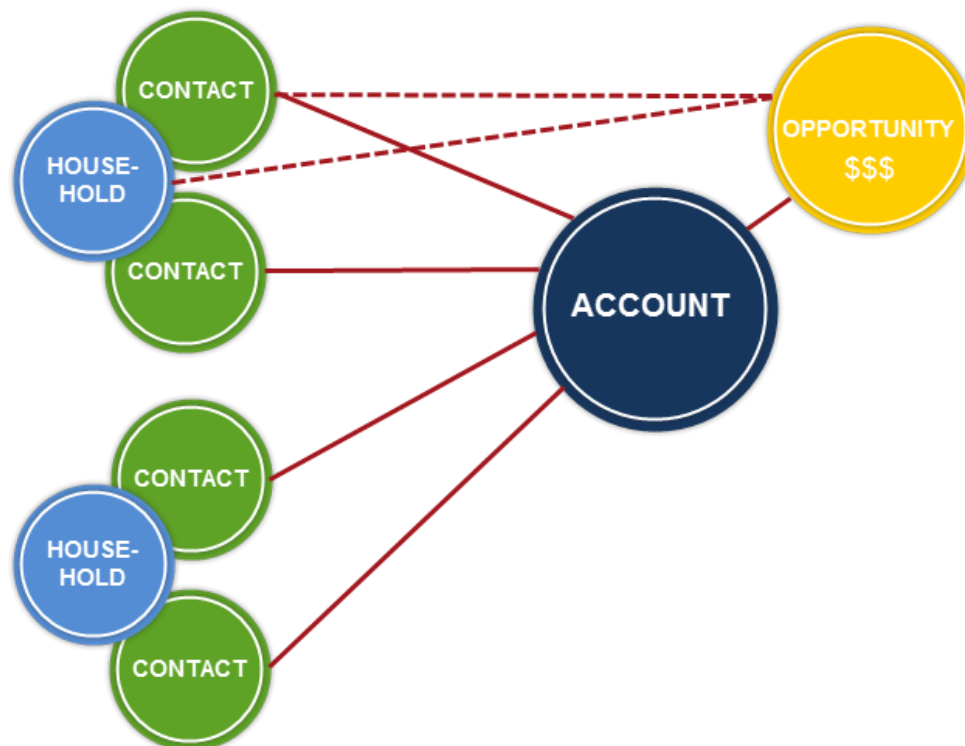
Individual ("Bucket") Account Model

In the Individual account model, all Contacts are associated with a single Account, as if all of your contacts have been dumped in one "bucket." The name of this gigantic Account is "Individual." In other words, you have one great big Account that holds all of your contacts.

In the Contact Details section of your Contact record, it looks like this:

Contact Detail		Edit	Delete
▼ Contact Details			
Name	Jennifer Johnston		
Account Name	<u>Individual</u>		
Primary Affiliation	?		
Title			

As with the 1-to-1 account model, you must create households in the Individual account model by joining contacts together through a separate Household object.



Again, this model was developed to conform to the standard Salesforce Account model, which requires all

Contacts be associated with an Account. The Individual account model is a legacy account model, and is no longer recommended.

Change My Account Model

The default account model for Nonprofit Success Pack is the Household Account model.

❗ IMPORTANT : Only experienced Salesforce Administrators should consider changing account models. Before changing an organization's account model, please note the following:

- If you haven't entered any Contacts into Salesforce, you can change your account model, and the new account model will apply to all new Contact information you add.
- If you have existing Contact information in Salesforce that you entered using one of the older account models, **you will need to develop a migration plan before switching over to the Household Account model.** For more information about our account model migration tool, see this article (</articles/Resource/NPSP-Convert-an-Existing-Account-Model-to-the-Household-Account-Model>).

If you need to change the default account model:

1. In the Nonprofit Success Pack, click the NPSP Settings tab.
2. Click **People | Account Model**.
3. Click Edit and make your selection.



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