

# NPSP: Which Account Model Am I Using?

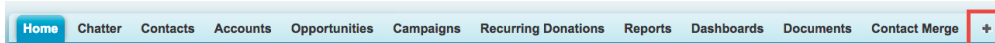
This article contains these sections:

- If You're Using Nonprofit Success Pack . . .
- If You're Using an Earlier Version of NPSP . . .
- Identifying the Account Model on an Account

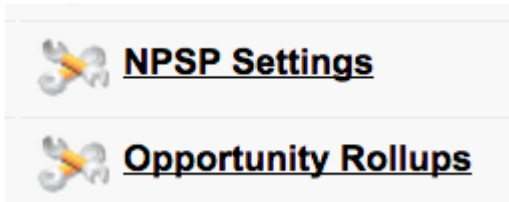
This article will help you figure out which Account Model you are using based on NPSP version. If you're not sure which version you're using, check out [Which Version of Nonprofit Success Pack Am I Using?](#) (/articles/Resource/Which-Version-of-NPSP-Am-I-Using). If you need more information on the different account models, see [What is an Account Model?](#) (/articles/Resource/NPSP-What-is-an-Account-Model).

## If You're Using Nonprofit Success Pack . . .

1. If you see the NPSP Settings tab in your tab set, skip this step. If you don't see the NPSP Settings tab in your tab set:
  1. In Salesforce, click on the plus (+) sign to the right of your row of Tabs to see the list of All Tabs.



2. Find **NPSP Settings** and click on it. (Tabs are listed alphabetically.)



2. In **NPSP Settings**, click **People | Account Model**. The first field on the page shows which account model you're using.

The screenshot shows the 'People - Account Model' configuration page in NPSP Settings. The left sidebar lists 'Nonprofit Starter Pack Settings' with a sub-menu 'People' containing 'Account Model', 'Households', 'Addresses', 'Leads', 'Relationships', 'Donations', 'Recurring Donations', 'Bulk Data Processes', and 'System Tools'. The main content area is titled 'People - Account Model' and includes a descriptive paragraph about the Account Model. Below this is a 'CONFIGURATION OPTIONS' section with three dropdown menus: 'Account Model' (set to 'Household Account'), 'Household Account Record Type' (set to 'Household Account'), and 'One-to-One Record Type' (set to '- none -'). Each dropdown has a detailed explanation of its function.

Home Accounts Contacts Leads Opportunities Campaigns Reports Recurring Donations Contact Merge **NPSP Settings** Getting Started +

Nonprofit Starter Pack Settings  
 v People  
 Account Model  
 Households  
 Addresses  
 Leads  
 > Relationships  
 > Donations  
 > Recurring Donations  
 > Bulk Data Processes  
 > System Tools

### People - Account Model

The Account Model for the Nonprofit Starter Pack determines if each Contact has its own "One-to-One" Account, "Household" Account, or if they all are related to a single "Individual" Account. This should be set at the beginning of use and not changed unless you fully understand the changes. If you change your Account model when you have real data, you'll need to migrate that data to the new model. For new organizations, the "Household" Account model is recommended.

CONFIGURATION OPTIONS

Account Model **Household Account**

Setting for the Account model. Should be "Household Account", "One-to-One", or "Individual". Replaces the custom field Contact.SystemAccountProcessor\_\_c. "Household Account" is the recommended model.

Household Account Record Type **Household Account**

The Account Record Type to be used for Household Accounts. If none is selected, the Account will default to the user's default Account Record Type.

One-to-One Record Type **- none -**

The Account Record Type to be used for One-to-One Accounts. If none is selected, the Account will default to the user's default Account Record Type.

**NOTE:** Changing the Account Model in NPSP Settings **does not** update existing accounts. It only sets the Account Model for accounts created from that point forward. It is entirely possible, but not recommended, to have a mix of accounts with different Account Models in your instance. See below for how to identify which Account Model a specific Account is using.

## If You're Using an Earlier Version of NPSP . . .

1. In Salesforce, click on the plus (+) sign to the right of your row of Tabs to see the list of All Tabs.

The screenshot shows the top of the Salesforce interface with a row of tabs: Home, Chatter, Contacts, Accounts, Opportunities, Campaigns, Recurring Donations, Reports, Dashboards, Documents, and Contact Merge. A red box highlights the plus (+) sign at the end of the tab bar.

Home Chatter Contacts Accounts Opportunities Campaigns Recurring Donations Reports Dashboards Documents Contact Merge +

2. Find **Contact Settings** and click on it. (Tabs are listed alphabetically.)  
 Your account model is listed in the Account Model section.

Contacts and Organizations Settings

## Configure Settings

Settings that control the behavior of the Contacts and Organizations package. Changing these will change how your Nonprofit Starter Pack behaves

**Contacts Settings** [Update the Contacts and Organizations Settings](#)

**Account Model**

The Account Model for the Nonprofit Starter Pack determines if each Contact has its own "One-to-One" Account or if they all are related to a sin beginning of use and not changed unless you fully understand the changes. If you change your Account model when you have real data, you'll ne

Account Processor ☒ One-to-One Individual

**Automatic Contact Roles**

You can choose to have an Opportunity Contact Role automatically created when Opportunities are created. There is a field on Opportunity calls valid Contact Id in that field, a Contact Role will be created according to the defaults set below. You can also turn the functionality off completely.

Enable Opportunity Contact Role Trigger ☒

Default Role

## Identifying the Account Model on an Account

When you set or change the Account Model in NPSP Settings as described above, **you're determining the Account Model for new accounts going forward**. Existing accounts created using a different Account Model are not updated.

To identify the Account Model, go to the Account record and look for the following key elements:

Account Record Type	Household Account <a href="#">[Change]</a>
_SYSTEM: AccountType	Household Account
_SYSTEM: IsIndividual	<input checked="" type="checkbox"/>

- **Account Record Type** - This tells you the Account Model for this particular Account. An Account under the Household Account Model typically uses the Household Account record type. Check the Record Type selection on the NPSP Settings tab by clicking **People | Account Model**. The Record Type should match the selection for the Account Model. If you don't see the **Account Record Type** field, you need to add it to your Account page layout.
- **\_SYSTEM: AccountType** field - This tells you the Account Model your Salesforce organization has set in NPSP Settings. You may have to add this field to your Account page layout to view its value. This is not a picklist field. You must update the values exactly as shown below:
  - **Household Account Model:** Value is Household Account
  - **One-to-One Individual Model:** Value is One-to-One Individual
  - **Individual Bucket Model:** Value is Individual Bucket
- **\_SYSTEM: IsIndividual** field: This field should be checked (True) for all Account Models.



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