

Person Account

Lesson 26: Person Account

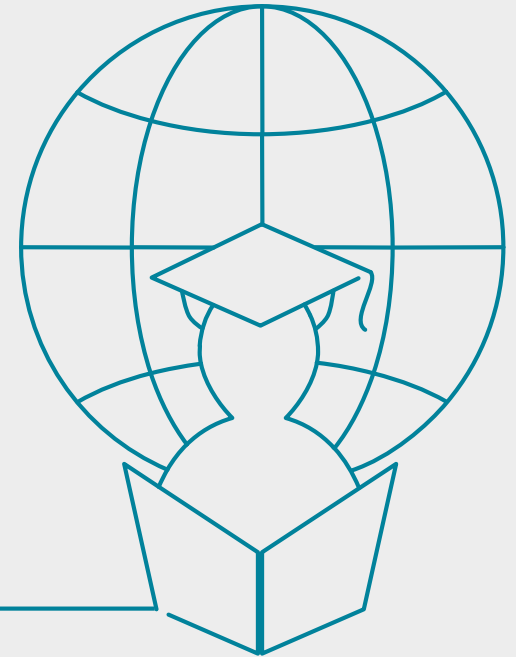
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Lesson Objectives

By the end of this lesson, you will be able to:

- What is Person Account?
- Person account behavior
- Enable person account



26.1: Person Account

What is Person Account?

Salesforce offers two types of Accounts

- Business accounts – default
 - Used to store information about companies or other entities
- Person account
 - Used to store information about individual people
 - Eg. Online shoppers, gym members, vacation travelers
 - Person cannot have contacts
 - Person account records store information that you'd store for business contact – like first name and last name
 - You can treat person account like a contact

26.1: Person Account

Person Account Behavior

Person accounts are accounts that can be used as contacts in many situations

Some areas where person account differ from business accounts:

- Person accounts can't have relationships with other accounts or with contacts. They can't be included in account hierarchies
- Chatter Feed Tracking: When you follow person accounts, you follow the account fields, but not the contact fields
- 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 View Hierarchy) and some contact fields (such as Reports To) are not supported for person accounts.
- Storage: Person accounts count against both account and contact storage because each person account consists of one account as well as one contact.

26.1: Person Account

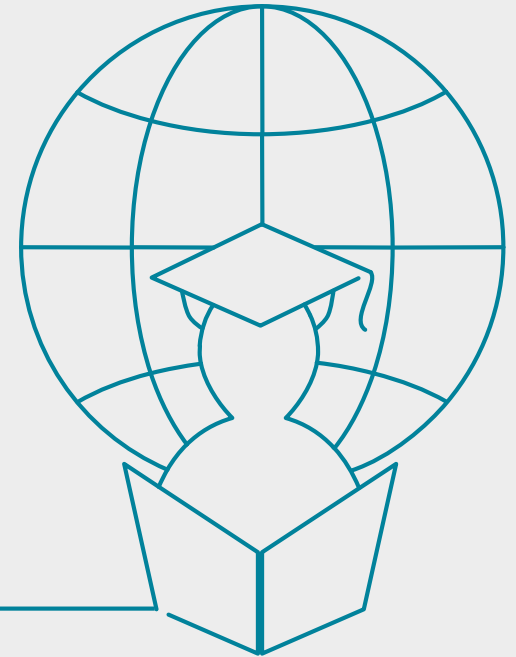
Enable Person Account

1. Contact Salesforce to have person accounts enabled for your organization.
2. From Setup, enter *Person Accounts* in the Quick Find box, then click 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.



Summary

Person Account is useful to store information about individual people
Person Account is like a Contact
Salesforce will enable Person Account for your organization



Q1: What are the Account types provided by Salesforce?

Q2: For Gym members what type of account is suitable?

- Business Account
- Person Account

Q3: Person Account can be enabled using setup?
True/false