Group Membership

Last Updated:2026.02.25

CONTENTS

Group Membership

Set up standard objects and guided flows to create and define groups of individuals, such as households. Then connect individuals and organizations to each other and track their relationships. Guided flows make it easy to create and edit groups, members, and relationships.

REQUIRED EDITIONS

Available in: View supported product editions.

Note Group Membership is different from the Householding feature, which is used in other Industries clouds such as Financial Services Cloud and Health Cloud. Net Zero Cloud uses only a subset of the Group Membership objects. Refer to these clouds' documentation for more information.

Discover Group Membership
Group Membership gives you the flexibility to organize relationships between people and organizations in meaningful ways. Create households or other groups and track relationships between individuals by using standard objects that are made for this purpose.

Group Membership Editions and Permissions
Review the supported products, editions, and permissions for Group Membership. Then learn about how your product handles permissions and how to assign them.

Set Up Group Membership
To create and manage relationships, turn on prerequisite settings and Group Membership. Group Membership enables the Account Account Relationship, Contact Contact Relationship, Party Role Relationship, and Party Relationship Group objects.

Define Groups and Relationships Between Individuals and Groups
Set up details about the types of groups and relationships common to your organization. To describe groups with greater nuance, use categories and subtypes. Create common role and relationship definitions for contacts and accounts.

Create Groups and Relationships
Group membership includes records that represent groups and map relationships between individuals, households, groups, and organizations. Create a group, relate individuals to that group, and capture complex relationships between groups and individuals.

Guided Flows for Group Membership
Set up group membership records quickly and easily by using guided flows. Create a group, merge two groups, or split a group, and specify roles and relationships for all members and entities.

Visualize Stakeholder Relationships with Actionable Relationship Center
Actionable Relationship Center (ARC) helps you understand relationships between people and

businesses by presenting them in a convenient and interactive component. Use group membership records to connect business accounts, person accounts, and contacts.

Group Membership and Your Cloud

Explore examples of how to model relationships in your industry and understand how to map different types of households and groups.

See Also

Financial Services Cloud Admin Guide: Groups and Households

Discover Group Membership

Group Membership gives you the flexibility to organize relationships between people and organizations in meaningful ways. Create households or other groups and track relationships between individuals by using standard objects that are made for this purpose.

REQUIRED EDITIONS

Available in: View supported product editions.

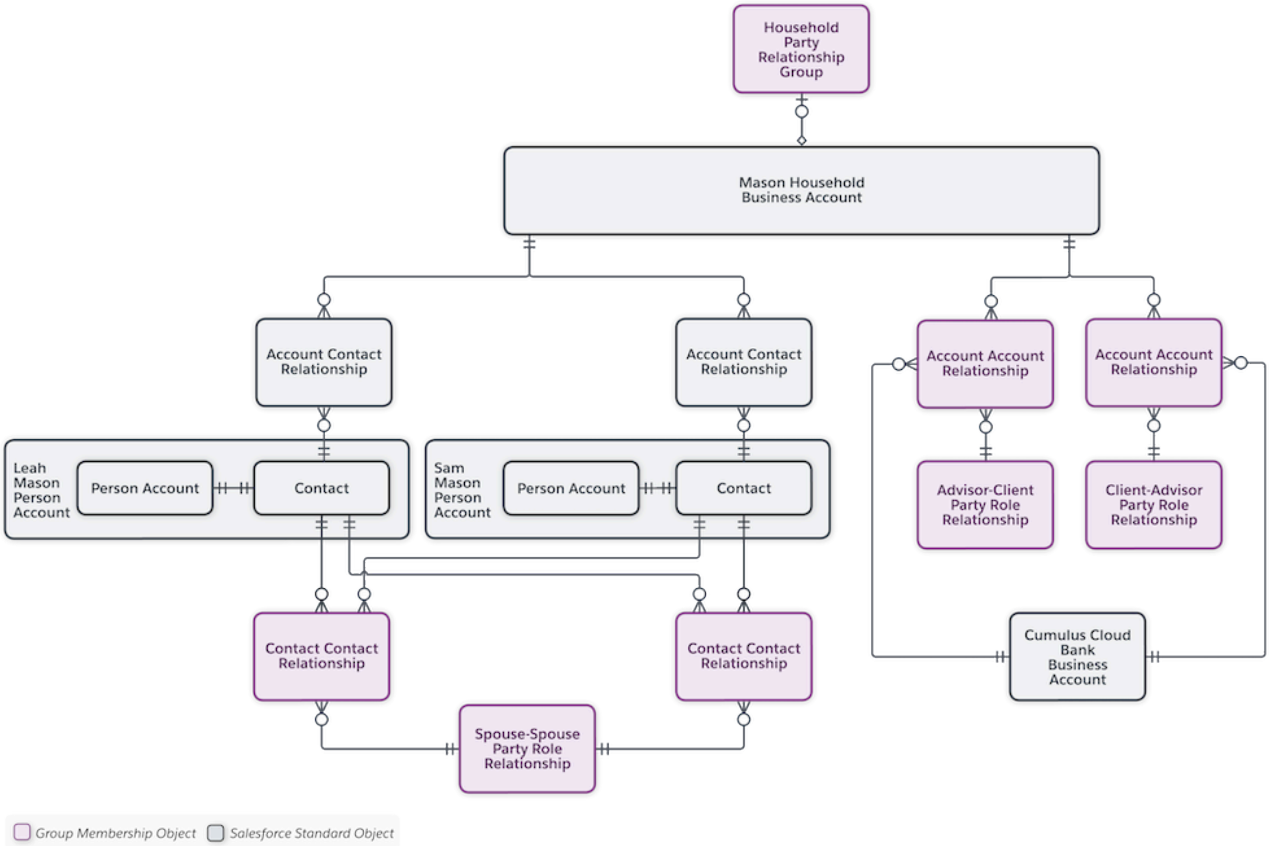
Note Group Membership is different from the Householding feature, which is used in other Industries clouds such as Financial Services Cloud and Health Cloud. Net Zero Cloud uses only a subset of the Group Membership objects. Refer to these clouds' documentation for more information.

A group is a collection of individuals whose relationships and shared attributes are important to how you serve them. For example, a group could consist of a household with family members and their relationships to professional service providers.

You can also use groups to organize individuals in other contexts, such as:

- Members of a professional or trade association
- Individuals who live in the same building or housing complex
- Your top customers or supporters

Consider a two-person household with a relationship to a business. Sam and Leah Mason are married, share a household, and use the financial advisory services of Cumulus Cloud Bank. Here's how you model the relationships between Sam, Leah, and Cumulus Cloud Bank by using the group membership objects.



Let's explore what each object represents in this example.

Note In 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.

Business Account

Represents groups or organizations. In this example, one business account represents the Mason household, and the other business account represents Cumulus Cloud Bank. Business accounts can also represent a neighborhood, professional association, or another organization.

Party Relationship Group

Designates a business account as a household or group and stores details about that group, such as its financial information. In this example, a household party relationship group relates to the Mason household business account to designate it a household and store details about its finances.

Person Account

Represents individuals. Enabling person accounts is required to use the Group Membership guided flows. In this example, Sam and Leah each have a person account that contains both account and contact details.

Account Contact Relationship

Relates a person account and a business account. In this example, Sam and Leah each have an account-contact relationship that connects their person accounts to their Mason household business account.

Contact Contact Relationship

Relates person accounts to each other. Use two contact-contact relationships to map an inverse relationship, such as spouses. In this example, two contact-contact relationships connect Sam and Leah's person accounts.

Account Account Relationship

Relates business accounts to each other. Use two account-account relationships to map an inverse relationship, such as a customer and a business. In this example, two account-account relationships connect the Mason household business account with Cumulus Cloud Bank's business account.

Party Role Relationship

Describes account-account and contact-contact relationships. In this example, two party role relationships related to Sam and Leah's contact-contact relationships describe their relationship as Spouse-Spouse. In addition, Client-Advisor and the inverse Advisor-Client party role relationships describe the Mason Household and Cumulus Cloud Bank account-account relationships.

See Also

Person Accounts

Set Up Group Membership

Financial Services Cloud Admin Guide: Groups (Householding)

Group Membership Editions and Permissions

Review the supported products, editions, and permissions for Group Membership. Then learn about how your product handles permissions and how to assign them.

- User Interface
- Editions
- Required Group Membership Permissions
- Other Required Permissions
- Customizing Permissions

User Interface

Group Membership is available in Lightning Experience.

Editions

- Automotive Cloud: Enterprise, Unlimited, and Developer Editions
- Education Cloud: Enterprise, Performance, Unlimited, and Developer Editions
- Financial Services Cloud: Professional, Enterprise, and Unlimited Editions
- Health Cloud: Enterprise and Unlimited Editions
- Nonprofit Cloud: Enterprise, Unlimited, and Developer Editions
- Public Sector Solutions: Enterprise, Performance, Unlimited, and Developer Editions

Required Group Membership Permissions

To use Group Membership, Salesforce admins and users need the user permission Group Membership. Typically, a Salesforce admin assigns a permission set that includes this user permission. Because the feature is included in multiple products, the products and licenses in your org determine which permission set is available.

These permission sets include the Group Membership user permission, permission set license, and full access to all Group Membership objects and fields.

Product	Permission Set	Notes
Automotive Cloud	• Group Membership • Automotive Foundation User	Automotive Foundation User provides access to additional fields on Party Relationship Groups.
Education Cloud	Education Cloud Full Access	See Other Required Permissions for importanat information about the merge and split groups workflows.
Financial Services Cloud	• FSC Sales • FSC Service • FSC Foundations • FSC Sales EUOZ • FSC Service EUOZ • Financial Services Cloud EUOZ • Financial Services Cloud Extension • FSC Comprehensive	See Other Required Permissions for importanat information about the merge and split groups workflows.
Health Cloud	Health Cloud Foundation	
Nonprofit Cloud	Group Membership	
Public Sector Solutions	Group Membership	

Don't see your product? Contact your account executive for more information. Or look for a permission set that includes the user permission Group Membership. To see what's included in a permission set, click **View Summary** on the permission set's detail page in Setup. Review your cloud's documentation, too

Other Required Permissions

These permissions are required to use the guided flows for merging and splitting party relationship groups.

Type of Permission	Name of Permission	Notes
User permission	Merge and Split Groups	Merge and Split Groups is included in the Group Membership permission set, but is disabled by default. To give users access, create a custom permission set, add the Group Membership permission set to it, and enable the Merge and Split Groups user permission. Then, add the custom permission set to a permission set group.
Permission set	Decision Explainer Service Access	Required to view logs created by the merge and split groups guided flows.

Important

- In Education Cloud, Merge and Split Groups is included with, and enabled by default, in the Education Cloud Full Access permission set, so you don't need to create a custom permission set.
- The merge and split groups workflows aren't supported in Financial Services Cloud.

Customizing Permissions

If you customize Group Membership, such as adding fields, create a custom permission set. To remove user permissions from the default permission set, create a muting permission set. Then, use permission set groups to assign users the Group Membership permission set in addition to your custom permission sets. This approach ensures that you always have the latest default permissions and is an alternative to cloning permission sets.

See Also

Manage Permission Set Assignments

Permission Set Groups

Muting Permission Sets

Set Up Group Membership

To create and manage relationships, turn on prerequisite settings and Group Membership. Group Membership enables the Account Account Relationship, Contact Contact Relationship, Party Role Relationship, and Party Relationship Group objects.

REQUIRED EDITIONS

Available in: View supported product editions.

Prerequisites for Group Membership

Complete the prerequisites before enabling Group Membership.

1. Turn on person accounts.
   See Enable Person Accounts.
2. Assign the person account record type to user profiles.
   See Assign Record Types and Page Layouts in Profiles.
3. Turn on contacts to multiple accounts and update your page layouts. Contact to multiple accounts enables the Account Contact Relationship object.
   See Set Up Contacts to Multiple Accounts.
4. Set up field-level security for the Name, Phone, and Email fields on the Contact object so that users can read these fields when they use the guided flows for Group Membership and Households.
   See Set Field-Level Security for a Field on All Profiles.

Enable Group Membership

To enable relationship objects, turn on Group Membership.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED	
To enable Group Membership settings:	Customize Application

1. From Setup, in the Quick Find box, enter `Group Membership`, and then select **Group Membership Settings**.
2. Turn on group membership.

See Also

Discover Group Membership

Developer Documentation: Party Relationship Groups Data Model

Define Groups and Relationships Between Individuals and Groups

Set up details about the types of groups and relationships common to your organization. To describe groups with greater nuance, use categories and subtypes. Create common role and relationship definitions for contacts and accounts.

REQUIRED EDITIONS

Available in: View supported product editions.

USER PERMISSIONS NEEDED	
To edit picklists:	Customize Application
To create party role relationships:	View permissions information.

Define Group Categories and Subtypes

Party relationship groups designate a business account as a household or a group, which you select from the object's Type field. To further categorize groups, create values for the Category and Subtype picklists. These fields help you report on different classifications of groups and better understand group relationships.

1. From the object management settings for party relationship groups, go to **Fields & Relationships**.
2. Click **Category**.
3. In Category Picklist Values, click **New**.
4. On separate lines, enter the values for the picklist. For example, enter `Live Together` and `Eat Meals Together.`
5. Save your changes.
6. Repeat these steps to create values for the Subtype picklist field. For example, create the Subtype values `Nuclear Family` and `Extended Family`.

Define Roles for Individuals in Groups

Use the Role field on an account-contact relationship to describe an individual's relationship to a group or organization. Create picklist values to suit your needs.

1. From the object management settings for account contact relationship, go to **Fields & Relationships**.
2. Click **Roles**.
3. In Roles Picklist Values, click **New**.
4. On separate lines, enter the values for the picklist. For example, enter `Primary Advisor` and `Preferred Technician`.
5. Save your changes.

Define Relationships Between Individuals and Relationships Between Groups

Party role relationships describe relationships between two accounts or between two contacts. Create and maintain party role relationships that describe the relationships between individuals, organizations, households, and groups.

Some party role relationships require inverse records to represent both sides of a relationship. Mapping an inverse relationship is optional but helpful to capture different transactions between parties and review a relationship from either party's record page. For example, create inverse party role relationships for parent-child relationships in a household, or for a vehicle repair shop and the vehicle owner's household. In the parent-child example, create a parent-child party role relationship, and a child-parent party role relationship to map the relationship in both directions. Both of these party role relationships can be created at the same time by selecting Create Inverse Role Automatically.

Other relationships, such as the relationship between colleagues or neighbors, don't require inverse party role relationships. In these situations, you need only one party relationship role, because a colleague-colleague or neighbor-neighbor party role relationship represents both sides of the relationship.

1. From the App Launcher, find and select **Party Role Relationships**.
2. Click **New**.
3. Enter a role name, such as `Father` or `Parent Company`.
4. Enter a related role name, such as `Daughter` or `Subsidiary Company`.
5. Select a relationship object name. For a father-daughter relationship, for example, select **Contact Contact Relationship**. For a parent-subsidiary relationship, select **Account Account Relationship**.
6. To create the inverse role relationship (of daughter-father, in our example), select **Create Inverse Role Automatically**.
7. Save your changes.

Create Groups and Relationships

Group membership includes records that represent groups and map relationships between individuals, households, groups, and organizations. Create a group, relate individuals to that group, and capture complex relationships between groups and individuals.

REQUIRED EDITIONS

Available in: View supported product editions.

USER PERMISSIONS NEEDED	
To create party relationship groups, account-contact relationships, account-account	View permissions information.

USER PERMISSIONS NEEDED
relationships, and contact-contact relationships:

Create a Group

Create groups for individuals, such as members of a household.

Every party relationship group relates to a business account. The party relationship group defines the business account as a group, and the business account relates to each member of the group. First, create a business account for your group, and then define it with a related party relationship group. Or create the account when you create the party relationship group.

1. From the App Launcher, find and select **Party Relationship Groups**.
2. Click **New**.
3. Specify these details.
   a. Enter a name.
   b. For Account, search for and select a business account. To create one, click **New Account**.
4. Specify these recommended details.
   a. For Category, select the option that best describes the group.
   b. For Type, select whether the group is a household.
   c. Enter a primary address.
5. If desired, enter start and end dates and a description, subtype, group income, and group size.
6. Save your changes.

Relate Individuals to Groups

Map relationships between a group and its members by using an account-contact relationship. An individual can relate to multiple groups and play different roles in each group. For example, an individual can have two account-contact relationships–one to their household and another to their employer.

Before you create account-contact relationships, make sure that you've enabled contacts to multiple accounts and added the Related Contacts related list to the account page layout. See Set Up Contacts to Multiple Accounts. In addition, add optional fields to the account contact relationship page layout. See Customize Page Layouts with the Enhanced Page Layout Editor.

1. From an Accounts list view, select the account for your party relationship group.
2. In the Related Contacts related list, click **Add Relationship**.
3. In the New Account Contact Relationship window, for Contact, search for and select a contact. You can add a contact or a person account.
4. For Roles, move the relevant roles to the Chosen list.
5. Specify the optional fields.
   a. To indicate that the contact is actively involved with the selected account, select **Active**.
   b. Select the start and end dates for the relationship.
   c. To indicate that the account is the contact's primary account based on the Account Name field on

the contact record, select **Direct**.

6. Save your changes.

Example An individual, represented by a person account, is related to multiple groups, represented by business accounts, using account-contact relationships. Leah Mason is the primary contact for the Mason Household business account. She's also an employee at DreamHouse Realty. Here are the account-contact relationship records that connect her with these accounts.

Account Contact Record 1	Account Contact Record 2
• Account: Mason Household • Contact: Leah Mason • Direct: Yes • Role: Decision Maker	• Account: DreamHouse Realty • Contact: Leah Mason • Direct: No • Role: Employee

Relate Groups to Groups

Map a relationship between two households, groups, or other business accounts by using account-account relationships. Then, relate a party role relationship to describe the account-account relationship.

1. From the App Launcher, find and select **Account Account Relationships**.
2. Click **New**.
3. Select the account and the related account.
4. For Party Role Relationship, search for and select the relationship that defines the two accounts. The names include the role of the selected account followed by the role of the related account, followed by AAR.
5. For Related Inverse Record, select or create the account-account relationship that has an inverse relationship with the account.

   Note For an account-account relationship to be inverse, we recommend that each account has a related account-account relationship where it's selected as the Account and the other account is selected as the Related Account.

6. Select a hierarchy type.
   - If one account is included in or dependent on the other, such as a parent business and one of its subsidiaries, select **Parent** or **Child**.
   - If the accounts aren't dependent on each other, such as a client–service provider relationship, select **Peer**.
7. Select the start and end dates for the relationship.
8. Save your changes.

Example Create an account-account relationship to relate a household business account to a service provider's business account where the household is a customer. Relate a party role relationship for the account-account relationship to describe the relationship as Customer-Service Provider. Then create an inverse account-account relationship between the service provider and the household with the party relationship role Service Provider-Customer. The Mason household is a client of Cumulus Cloud Bank's financial advisory services. The Mason household business account and the Cumulus Cloud Bank business account have a peer relationship.

Account Account Relationship Record 1	Account Account Relationship Record 2
• Account: Mason Household • Related Account: Cumulus Cloud Bank • Party Role Relationship: Client-Advisor-AAR • Hierarchy Type: Peer • Related Inverse Record: The record in Account Account Relationship Record 2	• Account: Cumulus Cloud Bank • Related Account: Mason Household • Party Role Relationship: Advisor-Client-AAR • Hierarchy Type: Peer • Related Inverse Record: The record in Account Account Relationship Record 1

Relate Individuals to Individuals

Map a relationship between two individuals by using contact-contact relationships. Connect individuals represented by person accounts or contacts.

1. From the App Launcher, find and select **Contact Contact Relationships**.
2. Click **New Relationship**.
3. For Contact and Related Contact, select a contact or person account.
4. For Party Role Relationship, search for and select the relationship that defines the two individuals. The names include the role of the selected contact, followed by the role of the related contact, followed by CCR.
5. For Related Inverse Record, select or create the contact contact relationship record that has an inverse relationship with the contact.

   Note For a contact-contact relationship to be inverse, we recommend that each account has a related contact-contact relationship where it's selected as the Contact and the other account is selected as the Related Contact.

6. Select a hierarchy type.
   - If one individual is dependent on the other, such as a biological or legal parent and child, select **Parent** or **Child**.
   - If the contacts aren't dependent on each other, such as the relationship between spouses, select **Peer**.
7. Select the start and end dates for the relationship.
8. Save your changes.

Example Create a contact-contact relationship to connect a parent's person account to their child's person account. Create a party role relationship for the contact-contact relationship that describes the relationship as Parent-Child. Create an inverse contact-contact relationship and use a Child-Parent party relationship role for the relationship.

Contact Contact Relationship Record 1	Contact Contact Relationship Record 2
• Contact: Jo Silvas • Related Contact: Gabriel Silvas • Party Role Relationship: Parent-Child-CCR • Hierarchy Type: Parent • Related Inverse Record: The record in Contact Contact Relationship Record 2	• Contact: Gabriel Silvas • Related Contact: Jo Silvas • Party Role Relationship: Child-Parent-CCR • Hierarchy Type: Child • Related Inverse Record: The record in Contact Contact Relationship Record 1

See Also
How Education Cloud Models Groups and Relationships
How Financial Services Cloud Models Groups and Relationships
How Nonprofit Cloud Models Groups and Relationships
How Public Sector Solutions Models Groups and Relationships
Public Sector Solutions Developer Guide: Group Definitions (POST)

Guided Flows for Group Membership

Set up group membership records quickly and easily by using guided flows. Create a group, merge two groups, or split a group, and specify roles and relationships for all members and entities.

REQUIRED EDITIONS

Available in: View supported product editions.

Create Groups by Using a Guided Flow
Create party relationship groups by using a guided flow. Add members, related contacts, business accounts, and other groups. Specify roles and relationships for all members and entities.

Merge and Split Groups by Using Guided Flows
Use guided flows to combine two groups or move members and related records from one group to another. Confirm related information such as cases and complaints related to the original and new groups–or tell the workflow to create tasks for you to review affected related records later.

View Group Membership Merge and Split Logs
When you combine two party relationship groups by using the Merge workflow, Decision Explainer logs the details of the groups and associates the logs with the merged group's parent account. When you split a party relationship group by using the Split workflow, Decision Explainer logs the details of the current and split groups and associates the logs with the parent account of the current group.

Limits for Group Membership Guided Flows
Understand the limits that govern the group merge and split guided flows. To increase the limits, contact your Salesforce representative.

Create Groups by Using a Guided Flow

Create party relationship groups by using a guided flow. Add members, related contacts, business accounts, and other groups. Specify roles and relationships for all members and entities.

REQUIRED EDITIONS

Available in: View supported product editions.

USER PERMISSIONS NEEDED	
To create a party relationship group by using the guided workflow:	View permissions information.

Before you create a party relationship group with the guided flow, create the necessary party role relationships. See Define Groups and Relationships Between Individuals and Groups.

The fields in the New Group guided flow, and the order in which they appear, are based on the party relationship group page layout. If you'd like different fields to be available, ask your Salesforce admin for help.

1. On a Party Relationship Groups list view page, click **New Group**.

   Note Depending on your cloud, you can start the guided flow also by clicking **New Group** on an account list view page, on a case, or on a public complaint record page.

2. Specify these details.
   a. Enter a name.
   b. For Type, select **Group** or **Household**.
3. Search for and select members, related contacts, related business accounts, and related groups to add to the group.
   At least one individual member is required. When you start the flow from a case or from a public complaint record, the case or complaint participants are automatically selected as members. If needed, change them to related contacts.
   A related contact is someone connected to the group but not a member, such as a family physician. Differentiate between a related contact and a member of the group with the Included in Group field on the account-contact relationship.
   A related group represents a linked group, such as a neighboring household.
   A related business account represents a business that the group owns or interacts with.
4. Click **Next**.
5. Specify the roles and relationships for the members, related contacts, related groups, and related business accounts in the group.
   a. Specify each member's role in the group and how they relate to others in the group. Designate one individual as the primary member of the group (for example, the head of the household).
   b. Specify each related contact's role and how they relate to others in the group.
   c. Specify how each related party relationship group relates to this group.
   d. Specify how each related business account relates to this group.

6. Save your work.

See Also

Limits for Group Membership Guided Flows

Merge and Split Groups by Using Guided Flows

Use guided flows to combine two groups or move members and related records from one group to another. Confirm related information such as cases and complaints related to the original and new groups–or tell the workflow to create tasks for you to review affected related records later.

REQUIRED EDITIONS

Available in: View supported product editions.

USER PERMISSIONS NEEDED	
To merge or split party relationship groups by using guided flows:	Group Membership user permission AND Merge and Split Groups user permission View permissions information.

Merge Groups

Combine two groups by using a guided flow. When you merge the groups, Salesforce merges the related information such as cases and complaints. Review that information or create tasks to check these records later.

When you merge two party relationship groups, the flow adds the members, related contacts, related groups, related business accounts, and related records such as cases and complaints from the secondary group to the primary group. The primary group becomes the merged group, and the flow deletes the secondary group.

The fields in the Merge workflow, and the order in which they appear, are based on the party relationship group page layout. If you'd like different fields to be available, ask your Salesforce admin for help.

1. From the App Launcher, find and select **Party Relationship Groups**.
2. Click **Merge**.
3. Under Primary Group, for Group Name, search for and then select the party relationship group that you want to keep. The primary group becomes the merged group.
4. Under Secondary Group, for Group Name, search for and then select the group that you want to merge into the Primary Group.

Review the members, related contacts, related groups, and related business accounts associated with the secondary group. Make sure that the secondary group has at least one member.
5. Click **Next**.
6. Specify the details of the merged group by selecting values from the primary group, the secondary group, or by entering custom values. For example, for Primary Address, select the address of the primary group.
7. Click **Next**.
8. Specify relationships for the members and related contacts, related groups, and related business accounts of the merged group.
   a. Specify each member's role and how they relate to others in the group. Designate an individual as the primary member of the group (for example, the head of the household).
   b. Specify each related contact's role in the group and how they relate to others in the group.
   c. Specify how each related party relationship group relates to this group.
   d. Specify how each related business account relates to this group.
9. Click **Next**.
10. Review merged records, or select records to create tasks that remind you to review the records later.
11. Save your work.

When the workflow finishes, it posts a status update on the Chatter feed of the merged party relationship group.

Split Groups

Use a guided flow to move members and related contacts, related groups, and related business accounts from one group to a new group. Update details to reflect changes to the current and split groups, or create tasks to review affected records later.

When households change—such as when a couple breaks up or an adult child moves out—split your party relationship groups to reflect the new circumstances. Use the Split workflow to move members, related contacts, related groups, and related business accounts from one group to another. Select the members to move, update details for both the current and split groups, and update the roles and relationships for group members. Finally, review and update records such as cases, complaints, or benefits that relate to moved members.

The fields in the Split workflow, and the order in which they appear, are based on the party relationship group page layout. If you'd like different fields to be available, ask your Salesforce admin for help

1. From the App Launcher, find and select **Party Relationship Groups**.
2. From the list view, select the party relationship group that you want to split.
3. On the party relationship group record page, from the actions menu, select **Split**.
   Under Current Group, review the members, related contacts, related groups, related business accounts, and primary member of the group.
4. Under Split Group:
   a. To create a group, select **New Group**, and then enter a group name.
   b. To use an existing group, select **Existing Group**, and then search for and select a party relationship group with at least one member. The workflow shows the members, related contacts, related

groups, related business accounts, and primary member of the selected group.

5. Select members, related contacts, related groups, and related business accounts and move them between the groups.
   You must move at least one member, related contact, related group, or related business account to the split group.
6. Click **Next**.
7. Specify the details of the current and split groups, and then click **Next**.
8. Specify the roles and relationships for the members and related contacts, related groups, and related business accounts in the split group.
   a. Specify each member's role and how they relate to others. Designate one member as the primary member of the group (for example, the head of the household).
   b. Specify each related contact's role and how they relate to others in the group.
   c. Specify how each related party relationship group relates to the split group.
   d. Specify how each related business account relates to the split group.
9. Click **Next**.
10. Review related records such as cases and complaints for the current group. Select records to move to the split group.
11. Click **Next**.
12. Select affected records to create tasks that remind you to review the records later.
13. Save your work.

When the workflow finishes, it posts a status update on the Chatter feed of the current party relationship group and its parent account. It also:

- Creates or updates the current and split party relationship group records
- Creates a parent account for a new group
- Creates or updates account-contact, contact-contact, and account-account relationships for moved members, related groups, and related business accounts
- Associates moved related records with the parent account of the split group
- Creates reminder tasks to review records later

See Also
Limits for Group Membership Guided Flows

View Group Membership Merge and Split Logs

When you combine two party relationship groups by using the Merge workflow, Decision Explainer logs the details of the groups and associates the logs with the merged group's parent account. When you split a party relationship group by using the Split workflow, Decision Explainer logs the details of the current and split groups and associates the logs with the parent account of the current group.

REQUIRED EDITIONS

Available in: View supported product editions.

USER PERMISSIONS NEEDED	
To access the Decision Explainer API:	View permissions information.

1. To view the Decision Explainer logs for Merge, find the record ID of the merged group's parent account. To view the Decision Explainer logs for Split, find the record ID of the current group's parent account.
2. Retrieve the logs by making a GET request to the /connect/decision-explainer/action-logs resource.
3. Specify these query parameters.

Parameter	Value
actionContextCode	The group's parent account record ID
applicationSubType	PtyRelaGrp
applicationType	PublicSector
processType	GroupAudit

See Also

Developer Documentation: Action Logs (GET, POST)

Limits for Group Membership Guided Flows

Understand the limits that govern the group merge and split guided flows. To increase the limits, contact your Salesforce representative.

REQUIRED EDITIONS

Available in: View supported product editions.

LIMIT	VALUE
Number of members in a new, merged, or split group	20
Number of related contacts in a new, merged, or split group	10
Number of groups related to a new, merged, or split group	15
Number of business accounts related to a new, merged, or split group	15
Number of review tasks in a merge or split workflow	100

Visualize Stakeholder Relationships with Actionable Relationship Center

Actionable Relationship Center (ARC) helps you understand relationships between people and businesses by presenting them in a convenient and interactive component. Use group membership records to connect business accounts, person accounts, and contacts.

REQUIRED EDITIONS

Available in: See Actionable Relationship Center Editions and Permissions

Deepen your understanding of an account by viewing party relationship groups and related records on an ARC graph.

Use Account Contact Relationship, Account Account Relationship, and Contact Contact Relationship as junction objects in ARC to show many-to-many relationships between contacts and accounts. Add details from party role relationship fields to describe account-account relationships and contact-contact relationships in the graph. Default templates for Account Relations and Contact Relations get you started.

See Also

Actionable Relationship Center (ARC)

Group Membership and Your Cloud

Explore examples of how to model relationships in your industry and understand how to map different types of households and groups.

How Education Cloud Models Groups and Relationships
Educational institutions use group membership to define relationships for the institution's constituents. Use the objects to connect learners and their families, and the institution to departments, colleges, and services.

How Financial Services Cloud Models Groups and Relationships
In Financial Services Cloud, use party relationship groups to organize members under a single household and to connect related households or associated business accounts, such as the member's lawyer, financial advisor, or health insurance provider.

How Nonprofit Cloud Models Groups and Relationships
Group Membership enables a nonprofit to define relationships for its stakeholders. Use the objects to map program participants and their families, donors of all types, and supporting grantmakers and other organizations.

How Public Sector Solutions Models Groups and Relationships
In Public Sector Solutions, use party relationship groups to organize constituents under a single

household and connect related households or associated business accounts, such as the constituent's employer or health insurance provider.

How Education Cloud Models Groups and Relationships

Educational institutions use group membership to define relationships for the institution's constituents. Use the objects to connect learners and their families, and the institution to departments, colleges, and services.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Enterprise**, **Unlimited**, and **Developer** Editions in Education Cloud

Here are a few examples of how to map constituent relationships by using the Group Membership objects in Education Cloud.

Example 1: An individual constituent

Data	Object	Record
An applicant	Person Account	A person account with details about the applicant
A learner	Person Account	A person account with details about the learner
An alumnus	Person Account	A person account with details about the alumnus
A staff member	Person Account	A person account with details about the staff member
A faculty member	Person Account	A person account with details about the faculty member
A donor	Person Account	A person account with details about the donor
A mentor	Person Account	A person account with details about the mentor

Example 2: A learner's family

Data	Object	Record
A learner's parent or guardian	Person Account	A person account with details about the learner's parent or guardian
A learner's sibling	Person Account	A person account with details about the learner's sibling
A learner's family	Household Account	A household account that represents the learner's household
The relationship between the learner and their parent or guardian	Account Contact Relationship	An account-contact relationship that connects the learner's person account to the contact record of their parent or guardian
The relationship between the learner's household and its members	Account Contact Relationship	Three account-contact relationships to define each individual's role in the household. • Learner to household account • Parent to household account • Sibling to household account
The relationship between the learner's family members	Contact Contact Relationship	Six contact-contact relationships: • Learner to parent or guardian • Learner to sibling • Parent or guardian to learner • Parent or guardian to sibling • Sibling to learner • Sibling to parent or guardian

Example 3: An organization

Data	Object	Record
A school	Business Account	A business account with details about the school
A college or department	Business Account	A business account with details about the college or department
A support service	Business Account	A business account with details about the support service
The relationship between a learner and their school.	Account Contact Relationship	An account-contact relationship that connects the learner's person account to the school's business account and defines the learner's role
A college admissions consulting firm	Business Account	A business account with details about the consulting firm
An individual agent for the consulting firm	Contact This individual is the only instance where a person is represented as a contact.	A contact record with details about the agent
The relationship between the learner and the agent	Account Contact Relationship	An account-contact relationship that connects the learner's person account to the agent's contact record and defines the learner's role
The relationship between the learner and the consulting firm	Account Contact Relationship	An account-contact relationship that connects the learner's person account to the consulting firm's business account and defines the learner's role
The relationship between the learner's household and the consulting firm	Account Account Relationship	Two account-account relationships: • Learner household to college admissions consulting firm • College admissions consulting

Data	Object	Record
		firm to learner household

How Financial Services Cloud Models Groups and Relationships

In Financial Services Cloud, use party relationship groups to organize members under a single household and to connect related households or associated business accounts, such as the member's lawyer, financial advisor, or health insurance provider.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Professional**, **Enterprise**, and **Unlimited** Editions in Financial Services Cloud

The example here shows how to map a client, related household, and contacts by using the Party Relationship Group and other relevant objects in Financial Services Cloud.

DATA	OBJECT	RECORD
Client	Person Account	A person account with details about the member
Client's household	Business Account AND Party Relationship Group	A party relationship group whose type is Household and describes the business account as a household
The client's spouse	Person Account	A person account with details about the client's spouse
The client's child	Person Account	A person account with details about the client's child
The relationship between the client's household and its members	Account Contact Relation	The account-contact relationships to define each individual's role in the household: • Client to business account • Spouse to business account • Child to business account

DATA	OBJECT	RECORD
The relationships between the client's family members	Contact Contact Relation	The contact-contact relationships: • Client to spouse • Client to child • Spouse to client • Spouse to child • Child to client • Child to spouse Each contact-contact relationship is related to a party role relationship record that describes the relationship.
The client's lawyer	Contact	A contact record with details about the lawyer
The relationships between the client and the lawyer	Account Contact Relation	An account-contact relationship that connects the client's person account to the lawyer's contact record and defines the participant's role
The health insurance provider of the client's household	Account	A business account that represents the health insurance provider organization

How Nonprofit Cloud Models Groups and Relationships

Group Membership enables a nonprofit to define relationships for its stakeholders. Use the objects to map program participants and their families, donors of all types, and supporting grantmakers and other organizations.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Enterprise**, **Unlimited**, and **Developer** Editions in Nonprofit Cloud

Here are a few examples of how to map stakeholder relationships by using the Group Membership objects in Nonprofit Cloud.

Example 1: An individual donor

Data	Object	Record
An individual donor	Person Account	A person account with details about the donor

Example 2: A program participant and their family

Data	Object	Record
A program participant	Person Account	A person account with details about the participant
The program participant's spouse	Person Account	A person account with details about the participant's spouse
The program participant's child	Person Account	A person account with details about the participant's child
The program participant's household	Business Account	A business account that represents the household
Details about the program participant's household	Party Relationship Group	A party relationship group whose type is Household and describes the business account as a household
The relationship between the program participant's household and its members	Account Contact Relationship	Three account-contact relationships to define each individual's role in the household: • Participant to business account • Spouse to business account • Child to business account
The relationships between the program participant's family members	Contact Contact Relationship	Six contact-contact relationships: • Participant to spouse • Participant to child • Spouse to participant

Data	Object	Record
		• Spouse to child • Child to participant • Child to spouse Each contact-contact relationship is related to a party role relationship record that describes the relationship.

Example 3: A major donor, their business, and their philanthropic advisory firm

Data	Object	Record
A major donor	Person Account	A person account with details about the donor
A philanthropic advisory firm	Business Account	A business account with details about the advisory firm
The donor’s household	Business Account	A business account that represents the donor’s household
Details about the donor’s household	Party Relationship Group	A party relationship group whose type is Household and describes the business account as a household
The donor’s business	Business Account	A business account that represents the business
The relationship between the donor and their household	Account Contact Relationship	An account-contact relationship that connects the donor’s person account to the household business account and defines the donor's role
The relationship between the donor and their business	Account Contact Relationship	An account-contact relationship that connects the donor’s person account to the business account and defines the donor's role

Data	Object	Record
The relationship between the donor's household and their philanthropic advisory firm	Account Account Relationship	Two account-account relationships: • Donor household to philanthropic advisory firm • Philanthropic advisory firm to donor household Each account-account relationship is related to a party role relationship record that describes the relationship.

Example 4: A grantmaking organization and its staff

Data	Object	Record
A grantmaking organization	Business Account	A business account that represents the grantmaking organization
The organization's executive director	Person Account	A person account with details about the executive director
The organization's program officer	Person Account	A person account with details about the program officer
The relationship between the organization and each staff member	Account Contact Relationship	Two account-contact relationships, one for each person account relating it to the business account

How Public Sector Solutions Models Groups and Relationships

In Public Sector Solutions, use party relationship groups to organize constituents under a single household and connect related households or associated business accounts, such as the constituent's employer or health insurance provider.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions in Public Sector Solutions

Here are a few examples of how to map constituent relationships by using the Group Membership objects in Public Sector Solutions.

Example 1: An individual constituent

Data	Object	Record
An individual constituent	Person Account	A person account with details about the constituent

Example 2: A benefit recipient and their family

Data	Object	Record
A benefit recipient	Person Account	A person account with details about the benefit recipient
The benefit recipient's spouse	Person Account	A person account with details about the benefit recipient's spouse
The benefit recipient's child	Person Account	A person account with details about the recipient's child
The benefit recipient's household	Business Account	A business account that represents the household
Details about the benefit recipient's household	Party Relationship Group	A party relationship group whose type is Household and describes the business account as a household
The relationship between the benefit recipient's household and its members	Account Contact Relationship	Three account-contact relationships to define each individual's role in the household: • Recipient to business account • Spouse to business account • Child to business account
The relationships between the benefit recipient's family members	Contact Contact Relationship	Six contact-contact relationships:

Data	Object	Record
		• Recipient to spouse • Recipient to child • Spouse to recipient • Spouse to child • Child to recipient • Child to spouse Each contact-contact relationship is related to a party role relationship record that describes the relationship.

Example 3: A case participant, their household, their employer, and their household's health insurance provider

Data	Object	Record
A case participant	Person Account	A person account with details about the case participant
The case participant's household	Business Account	A business account that represents the household
Details about the case participant's household	Party Relationship Group	A party relationship group whose type is Household and describes the business account as a household
The case participant's employer	Business Account	A business account that represents the business
The relationship between the case participant and their employer	Account Contact Relationship	An account-contact relationship that connects the case participant's person account to the employer's business account and defines the participant's role
The relationship between the case participant's household and the household's health insurance provider	Account Account Relationship	Two account-account relationships: • Case participant's household to health insurance provider • Health insurance provider to

Data	Object	Record
		case participant's household Each account-account relationship is related to a party role relationship record that describes the relationship.

See Also

Public Sector Solutions Developer Guide: Group Memberships and Households Data Model