

Contacts to Multiple Accounts

Overview

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The Salesforce logo, which consists of the word "salesforce" in a white, lowercase, sans-serif font, centered within a blue cloud-like shape.

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Cari Aves

Sales Cloud Product Management
Salesforce

We Heard You...

“Duplicating the contact to attach to multiple accounts **leaves us open to error**”

“This is the **single most problematic issue for us**. If reps didn't have to maintain 3-4 identical contacts, adoption would skyrocket”

“**This seems so basic** it's hard to believe that something as good as Salesforce handles this so badly”

“We are currently having to create multiple copies of contacts to get around this, but that is **starting to become unmanageable**”

“It **would help our productivity so much if we didn't have to re-create records** for different accounts and help us ensure data quality.”

Contacts to Multiple Accounts

Generally Available in Summer '16

The screenshot displays the Salesforce interface for a contact named Marc Benioff. The contact's details include Title (Executive Officer), Account Name (Salesforce), Phone ((415) 901-7000), and Email (info@salesforce.com). The 'RELATED' tab is active, showing a list of related accounts. The 'DETAILS' section shows 10 people in common with the contact. The 'ACTIVITY' and 'COLLABORATE' tabs are also visible. The 'Related Accounts' section lists three accounts: Salesforce, Oracle, and UCSF Benioff Children's Hospital, each with roles and relationship strength. The 'Opportunities' section shows two opportunities: 'salesforce.com - 240 Widgets' and 'salesforce.com - 200 Widgets'.

Eliminate the need for duplicate contacts

Capture unique attributes about the relationship

View current and past relationships to connect the dots



Why Contacts to Multiple Accounts?

- People often work with more than one company
- Currently, in Salesforce it isn't easy to track these relationships
 - Duplicate Contacts
 - Account Contact Roles
 - Custom Junction Object
 - AppExchange Packages (Affiliations, Former Positions, Employment Change Management)
- Contacts to Multiple Accounts allows your sales reps to easily track the relationships between the people and businesses they work with—*without* creating duplicate records and *without* major customizations by your admin

Contacts to Multiple Accounts Use Cases

- A single contact who holds positions in several companies
- A business owner who owns more than one company
- A consultant who works on behalf of several companies
- A donor who gives to multiple organizations
- A physician who works across multiple locations
- A family member or contact within a household
- A group member that belongs to many associations

Our Objective

**Allow a single contact to be associated to multiple accounts
and be able to apply standard account-contact behavior**

(a many to many relationship between accounts and contacts)

Contacts to Multiple Accounts Requirements

- **Associate a single contact to multiple accounts** and view these relationships from the Account or Contact record
- **Capture unique attributes** about the Account-Contact relationship
- **Retain the history** of an Account-Contact relationship
- **Roll up activities, opportunities or other related records** for a contact to one of their related accounts
- **Report on the Account-Contact relationship** and related opportunities, activity history, etc.
- **Segment contacts** based on attributes across their account relationships

▶ Demonstration

Some Helpful Terminology

- The account listed on a contact record is the ***primary*** account
- The relationship between a contact and its primary account is a ***direct*** relationship
- Additional accounts can be related to the contact. These secondary relationships are ***indirect*** relationships

Enable Contacts to Multiple Accounts

The screenshot shows the Salesforce Setup interface. On the left, the navigation menu includes sections like Email, Platform Tools, Apps, Analytics, AppExchange Marketplace, and Sales. The 'Sales' section is expanded, showing options like Account Owner Report, Account Settings, Account Teams, Activity Settings, Contact Roles on Opportun., Notes Settings, Opportunity Team Settings, and Products. The 'Account Settings' option is highlighted. A blue callout bubble points to this option with the text: "New Account Settings option to enable contacts to multiple accounts".

The main content area is titled "Account Settings" and includes a search bar at the top. Below the title, there is a section for "General Settings" and a section for "Contacts to Multiple Accounts Settings". The "Contacts to Multiple Accounts Settings" section contains the following options:

- ☒ Allow users to relate a contact to multiple accounts
- When users delete an account that has direct contacts that are related to other accounts:**
 - ☐ Block users from deleting the account
 - ☐ Allow users to delete the account, and automatically delete all direct contacts even if they are related to other accounts
- When users replace the primary account on a contact record:**
 - ☐ Save the relationship between the contact and the previous primary account as an indirect relationship
 - ☐ Delete the relationship between the contact and the previous primary account

The "Allow users to relate a contact to multiple accounts" checkbox is highlighted with a red dashed border. The "Edit" button is visible at the bottom of the settings section.

Configure Account Contact Related Functionality

The screenshot displays the Salesforce 'Account Settings' page. On the left is a dark blue sidebar with navigation icons and a menu. The main content area is titled 'Account Settings' and includes a search bar at the top. Below the title, there's a section for 'General Settings' and a section for 'Contacts to Multiple Accounts Settings'. The 'Contacts to Multiple Accounts Settings' section is highlighted with a red dashed border. A blue callout box with white text points to this section, stating: 'Decide how you want to manage Account-Contact supporting functionality'.

Account Settings

Use the account settings below to specify default account behavior for your organization.

General Settings

- Show View Hierarchy Link ☒ ⓘ
- Enable Account Insights ☐ ⓘ
- Enable Account Autofill ☐ ⓘ

Contacts to Multiple Accounts Settings

Allow users to relate a contact to multiple accounts ☒ ⓘ

When users delete an account that has direct contacts that are related to other accounts:

- ☒ Block users from deleting the account
- ☐ Allow users to delete the account, and automatically delete all direct contacts even if they are related to other accounts

When users replace the primary account on a contact record:

- ☒ Save the relationship between the contact and the previous primary account as an indirect relationship
- ☐ Delete the relationship between the contact and the previous primary account

Choose Activity Roll Up Settings

The screenshot shows the Salesforce 'Activity Settings' page. The left sidebar contains a navigation menu with categories like Email, Platform Tools, Apps, Chatter, Connected Apps, Data.com, Home, Installed Packages, Marketing, Mobile Apps, Navigation Menus, Sales, and Products. The 'Sales' category is expanded, showing options like Account Owner Report, Account Settings, Account Teams, Activity Settings (highlighted), Contact Roles on Opportun., Notes Settings, Opportunity Team Settings, and Products.

The main content area is titled 'Activity Settings' and includes a 'Create' button. Below the title, it says 'Modify your activity settings here.' A list of settings is displayed, each with a checkbox and an information icon. A red dashed box highlights the 'Roll up activities to a contact's primary account' setting. A yellow callout box points to this setting, stating: 'When an activity is associated to a contact, also display the activity under the primary account for the contact. We recommend that you don't select this option if you allow users to relate contacts to multiple accounts.'

A blue callout box with a speech bubble points to the 'Roll up activities to a contact's primary account' setting, containing the text: 'Configure activity roll up behavior between contacts and accounts'.

At the bottom of the settings list, there is a 'Submit' button and a 'Cancel' button. A yellow callout box points to the 'Allow Users to Relate Multiple Contacts to Tasks and Events' setting, stating: 'Feature enabled. To disable this feature, contact the salesforce.com Support team.'

Update Account and Contact Page Layouts

Account Layout

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields Buttons Custom Links Quick Actions Salesforce Actions Expanded Lookups Related Lists Report Charts

Quick Find Related List Name

Account Team Cases Content Deliveries Notes Orders Social Posts

Activity History Clean This Record... Contracts Notes & Attachments Partners Work Orders

Approval History Contact Roles Files Open Activities Related Contacts

Assets Contacts Groups Opportunities Social Personas

Related Lists

Related Contacts

Contact Name	Account Name	Title	Email	Phone	Roles
Sarah Sample	Sample Account Name	Sample Title	sarah.sample@company.com	1-415-555-1212	Sample Roles

Opportunities

Opportunity Name	Amount	Close Date
Sample Opportunity Name		

Account Team

This list is not customizable

Notes

This list is not customizable

Files

This list is not customizable

Cases

New

Contact Layout

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields Buttons Custom Links Quick Actions Salesforce Actions Expanded Lookups Related Lists Report Charts

Quick Find Related List Name

Activity History Cases Groups Open Activities Social Posts

Approval History Clean This Record... HTML Email Status Opportunities Work Orders

Assets Content Deliveries Notes Related Accounts

Campaign History Files Notes & Attachments Social Personas

Related Lists

Related Accounts

Account Name	Active	Roles	Relationship Strength
Sample Account Name	✓	Sample Roles	Sample Relationship Strength

Opportunities

Opportunity Name	Status
Sample Opportunity Name	

Notes

This list is not customizable

Files

This list is not customizable

Cases

Case	Status	Date Opened	Subject
GEN-2004-001234	Sample Status	4/5/2016 12:52 PM	Sample Subject

Create Account Contact Relationship Fields

Search Salesforce

Find in page Schema Builder Create

SETUP > OBJECT MANAGER
Account Contact Relationship

Fields & Relationships (8)
Page Layouts (1)
Object Limits (4)

Details

Description

API Name	AccountContactRelation	Enable Reports
Custom		Track Activities
Singular Label	Account Contact Relationship	Track Field History
Plural Label	Account Contact Relationships	Deployment Status

Help Settings Standard s

Fields & Relationships (8)

New Field Dependencies

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account	AccountId	Lookup(Account)		✓
Active	IsActive	Checkbox		
Contact	ContactId	Lookup(Contact)		✓
Direct	IsDirect	Checkbox		

Add Custom Fields to capture key information about an account contact relationship

Create Account Contact Relationship Page Layouts

The screenshot displays the Salesforce Object Manager interface for configuring the 'Account Contact Relationship Layout'. The left sidebar contains navigation links for Setup Home, Administration (Users, Data, Email), Platform Tools (Apps, Objects and Fields, Object Manager, Schema Builder), Process Automation, User Interface, Custom Code, Environments, Settings (Company Settings, Identity, Security), Setup Assistant, and Lightning Experience. The main content area shows the 'Account Contact Relationship Layout' configuration. At the top, there's a 'Quick Find' bar and a 'Search Salesforce' bar. Below these, the 'Object Manager' header includes a 'Create' button. The 'Account Contact Relationship Layout' section has a 'Save' button, 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties' options. A 'Fields' list on the left includes 'Expanded Lookups' and 'Report Charts'. The 'Quick Find' bar is set to 'Field Name'. The 'Fields' table lists fields for 'Contact', 'Roles', 'Start Date', 'End Date', and 'Relationship Stre...'. The 'Account Contact Relationship Sample' section shows a 'Sample Account' and 'Sample Contact' relationship. The 'Account Contact Relationship Information' section displays 'Start Date' (4/5/2016) and 'End Date' (4/5/2016). The 'Additional Information' section shows 'Relationship Strength' (Sample Relationship Strength) and 'Roles' (Sample Roles). The 'Mobile Cards (Salesforce1 only)' section includes a note: 'Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.'

Create custom Page Layouts to display relevant fields for a relationship

Link a Contact to Multiple Accounts

The screenshot displays the Salesforce interface for an account named 'Salesforce'. The account details include Type: Customer, Phone: (415) 901-7000, Website: http://www.salesforce.com, and Account Owner: Cari Aves. Below the account details, there are tabs for 'RELATED' and 'DETAILS'. The 'RELATED' tab is active, showing a list of 'Related Contacts (4)'. The contacts listed are Marc Benioff (Account Name: Salesforce, Title: Executive Officer, Direct: checked), Parker Harris (Account Name: Salesforce, Title: Co-Founder, Direct: checked), Maynard Webb (Account Name: Yahoo!, Title: Chairman, Direct: unchecked), and Susan Wojcicki (Account Name: YouTube, Title: CEO, Direct: unchecked). A red dashed box highlights the 'New Contact' and 'Add Relationship' buttons. A blue callout bubble points to these buttons with the text 'Create new or add an existing contact'. Another blue callout bubble points to the 'Related Contacts' section with the text 'A single related list for all contact relationships'. The right sidebar shows 'Next Steps' and 'Past Activity' sections. The 'Next Steps' section includes tasks like 'Schedule meeting with Marc' and 'Send latest proposal'. The 'Past Activity' section includes activities like 'Call with Marc' and 'Discuss partnership opportunities'.

ACCOUNT
Salesforce

Type Customer Phone (415) 901-7000 Website http://www.salesforce.com Account Owner Cari Aves

RELATED DETAILS

Salesforce @salesforce
Connect to your customers in a whole new way. Stay up-to-date on news, announcements, and innovation. On duty Mon - Fri 9am - 5pm PT.
San Francisco, CA salesforce.com

1 person in contact
Show More

Create new or add an existing contact

A single related list for all contact relationships

Related Contacts (4)

Marc Benioff
Account Name: Salesforce
Title: Executive Officer
Direct: ☒

Parker Harris
Account Name: Salesforce
Title: Co-Founder
Direct: ☒

Maynard Webb
Account Name: Yahoo!
Title: Chairman
Direct: ☐

Susan Wojcicki
Account Name: YouTube
Title: CEO
Direct: ☐

View All

Opportunities (6+)

Next Steps

Schedule meeting with Marc No due date
Name Marc Benioff

Send latest proposal Apr 8
Name Marc Benioff

Past Activity

Call with Marc Mar 10
Name Marc Benioff

Discuss partnership opportunities Mar 3

View Related Accounts and Contacts

The screenshot displays the Salesforce interface for a contact record. At the top, the Salesforce logo and a search bar are visible. The contact's name, Marc Benioff, is prominently displayed with a profile picture and buttons for Follow, Edit, Delete, and Clone. Below this, the contact's details are listed: Title (Executive Officer), Account Name (Salesforce), Phone ((415) 901-7000), and Email (info@salesforce.com). The interface is divided into two main sections: RELATED and ACTIVITY. The RELATED section shows a list of related accounts, including Salesforce, Oracle, and UCSF Benioff Children's Hospital, with details on their relationship strength and roles. The ACTIVITY section shows a list of activities, including Log a Call, New Task, New Event, and Email, with a 'Next Steps' section for upcoming tasks. A blue callout bubble points to the 'RELATED' section, and another points to the 'ACTIVITY' section.

View the relationship from the account or contact record

Customize the related lists to display key fields

CONTACT
Marc Benioff

+ Follow Edit Delete Clone

Title: Executive Officer
Account Name: Salesforce
Phone: (415) 901-7000
Email: info@salesforce.com

RELATED DETAILS

Marc Benioff @Benioff
CEO@salesforce.com
Salesforce.com salesforce.com

10 people in common
Show More

Related Accounts (3)
Add Relationship

Account	Active	Roles	Relationship Strength
Salesforce	<input checked="" type="checkbox"/>	Economic Decision Maker; Executive Spo...	Strong
Oracle	<input type="checkbox"/>	Decision Maker	Neutral
UCSF Benioff Children's Hospital	<input checked="" type="checkbox"/>	Executive Sponsor; Decision Maker; Infl...	Strong

View All

Opportunities (6+)

Opportunity	Stage	Amount
salesforce.com - 240 Widgets	Negotiation (Commit)	22500
salesforce.com - 200 Widgets	Closed Won	20000

ACTIVITY COLLABORATE

Log a Call New Task New Event Email

Show: All Activities
More Steps

Next Steps

Task	Due Date
Send latest proposal	Apr 8
Board Meeting Prep	Tomorrow
Discuss partnership opportunities	Mar 3



Capture Key Information About the Relationship

Track the status of the account contact relationship

Capture unique attributes about the relationship

Edit Account Contact Relationship

Account Contact Relationship Information

Account: Salesforce

Roles

- Economic Decision Maker
- Evaluator
- Executive Sponsor
- Influencer

Relationship Strength

Strong

Additional Information

Active: ☒

Start Date: 2/1/1999

End Date:

Cancel Save



Remove an Account Contact Relationship

The screenshot displays the Salesforce interface for a contact named Marc Benioff. The contact's profile is shown at the top, including their title (Executive Officer), account name (Salesforce), phone number, and email address. Below the profile, there are sections for 'Related Accounts' and 'Opportunities'.

Update the Account Name
field to change a contact's primary account relationship

Click the Remove Relationship link to delete a contact's relationship to a secondary account

The 'Related Accounts' section lists three accounts: Salesforce, Oracle, and UCSF Benioff Children's Hospital. The 'Opportunities' section lists two opportunities: 'salesforce.com - 240 Widgets' and 'salesforce.com - 200 Widgets'.


The 'Remove Relationship' link is highlighted in the 'Related Accounts' section, indicating the action to be taken to delete the contact's relationship to a secondary account.

Automatically Save Past Account Relationships

The screenshot displays the Salesforce interface for editing the contact 'Marc Benioff'. The left sidebar shows the contact's profile with a 'RELATED' tab. The main content area is titled 'Edit Marc Benioff' and contains fields for Name, Salutation, First Name, Last Name, Account Name, and Phone. A red dashed arrow points to the 'Search Accounts' input field under the 'Account Name' section. Below this input, a list of related accounts is shown, including 'Salesforce (415) 901-7000' and 'UCSF Benioff Children's Hospital (415) 353-1664'. A blue callout bubble with the text 'When you change a contact's primary account the previous account relationship is saved' points to the 'Related Accounts' section. This section shows two accounts: 'Oracle' (Inactive) and 'Salesforce' (Active). The 'Oracle' account has the role 'Decision Maker' and a 'Relationship Strength' of 'Neutral'. The 'Salesforce' account has the roles 'Economic Decision Maker; Executive Spo...' and a 'Relationship Strength' of 'Strong'. An 'Add Relationship' button is visible in the top right of the 'Related Accounts' section.

When you change a contact's primary account the previous account relationship is saved

Deleting an Account with Related Contacts

 Deletion problems
Back to Previous Page

Your attempt to delete Salesforce could not be completed because it is associated with the following cases. If the following table is empty, it is because you do not have access to the record.

Case Number	Subject	Status	Date/Time Opened
00001006	Threw the phone	New	1/5/2016

You can't delete this account because one or more of its direct contacts are related to other accounts. Remove the indirect relationships, then try deleting the account again. Only contacts you have access to are listed. If the following table is empty, it is because you do not have access to the records restricting the delete.

Name	Account Name	Phone	Email	Alias
Benioff, Marc	Salesforce	(415) 901-7000	info@salesforce.com	CAves
Harris, Parker	Salesforce		parker.harris@salesforce.demo	CAves

Your attempt to delete Salesforce could not be completed because some opportunities in that account were closed won. The opportunities that could not be deleted are shown below. If the following table is empty, it is because you do not have access to the records restricting the delete.

Opportunity Name	Created Date
salesforce.com - 200 Widgets	1/5/2016
Salesforce - 140 Widgets (Sample)	1/5/2016
Salesforce.com - 160 Widgets (Sample)	1/5/2016
salesforce.com - 220 Widgets (Sample)	1/5/2016
Salesforce.com - 25 Widgets	1/5/2016
salesforce.com - 200 Widgets (Sample)	1/5/2016
Salesforce.com - 200 Widgets (Sample)	1/5/2016
Salesforce.com - 300 Widgets (Sample)	1/5/2016

Click [OK](#) to continue or [Cancel](#) to return to the previous page.

Admins can **block users** from deleting accounts with direct contacts that are related to other accounts

Deleting an Account with Related Contacts

The screenshot displays the Salesforce Lightning interface for an account named 'Salesforce'. The account details include a phone number (+1.415.901.7000) and a website (http://www.salesforce.com). The account owner is 'Sales Admin'. A modal dialog box is open in the center, displaying an error message: 'An error occurred while trying to update the record. Please try again. Your attempt to delete Salesforce could not be completed because it is associated with the following cases.: 00001635, 00001636, 00001637 Your attempt to delete Salesforce could not be completed because some opportunities in that account were closed won. The opportunities that could not be deleted are shown below.: Salesforce - 20K Widgets, Salesforce - 50K Widgets, Salesforce - 100K Widgets, Salesforce - 10K Widgets'. The background shows the account's 'RELATED' tab with 'Account Insights' and a list of news items. A blue speech bubble points to the error message, stating: 'Account delete block error message in Lightning and S1 concatenates the error text'.

ACCOUNT
Salesforce + Follow

TYPE PHONE WEBSITE ACCOUNT OWNER
+1.415.901.7000 http://www.salesforce.com Sales Admin

RELATED DETAILS

Account Insights

ANNUAL REVENUE
\$1.57M -56.53%

Salesforce.com News

Localytics Aligns with Salesforce to Bring Deeper Intelligenc...

BOSTON, April 7, 2016 /PRNewswire - Localytics, a leading mobile engagement platform, today announced it is working with Salesforce to bri...

PR NEWswire - 4h TECHCRUNCH - 3d WALL STREET JOURNAL - 7d

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1 person in common
Show More

Activity Collaborate

Event Email New Task

Object

All Activities

Steps

Schedule follow up call with Marc Mar 3
Name Marc Benioff

Past Activity

Prepare proposal for 20K Widgets deal Jan 29
Related To Salesforce - 20K Widgets

Executive meeting with Marc and Parker Jan 11

More Past Activity



Merge Accounts or Contacts



Merge My Contacts

[Merge Contacts Video Tutorial](#) | [Help for this Page](#) ?

Step 1. Select the records to merge

Step 1 of 2

[Next](#) [Cancel](#)

Please select up to three records that you wish to merge into one. Use the "Find Contacts" feature to search for specific contacts directly related to this account, or click the All Contacts button to show all of the contacts directly related to this account.

[Find Contacts](#)

[All Contacts](#)

	Contact	Email	Phone	Owner
<input checked="" type="checkbox"/>	Marc Benioff		(415) 901-7000	Cari Aves
<input checked="" type="checkbox"/>	Marc Benioff	info@salesforce.com	(415) 901-7000	Cari Aves

Users are prevented from merging records that result in conflicting relationships

You can't merge contacts or accounts where there would be duplicate relationships after the merge.

Before you can merge contacts, you must ensure that the merge won't result in duplicate account relationships by removing these existing relationships:

Account Name	Contact Names
UCSF Benioff Children's Hospital	Marc Benioff , Marc Benioff

Click [here](#) to return to the previous page.

Create Account-Contact Specific Transactions

Users should **populate the Related To** with the appropriate account

Calendar **New Event** Help for this Page ?

Event Edit Save Save & New Task Save & New Event Cancel

Calendar Details = Required Info

Assigned To

Subject

All-Day Event ☐

Start

End

Related To

Name

Private ☐

Lookup

Go! New

You can use "*" as a wildcard next to other characters to im

Related Accounts

Account Name	Account Site
Salesforce	HQ
UCSF Benioff Children's Hospital	Mission
Oracle	


Account Contact Relationship Access

Required CRUD and Sharing





	VIEW ACREL	CREATE ACREL	EDIT ACREL	DELETE ACREL
Object-level permission (CRUD)	Read on Account AND Read on Contact	Read on Account AND Edit on Contact	Read on Account AND Edit on Contact	Read on Account AND Edit on Contact
Record-level permission (Sharing)	Read Contact	Read Account AND Read Contact	Read Account AND Write Contact	Read Account AND Write Contact

Note: Account Contact Relationships don't provide implicit access to either account or contact records

Account Contact Relationship Access



YouTube




Show Feed Click to add topics: ⓘ

« Back to List: Users

Related Contacts [2] | Opportunities [0] | Account Team [0] | Contacts [2] | Notes [0] | Files [0] | Cases [0] | Notes & Attachments [0] | Open Activities [0] | Activity History [0]

Account Detail

Edit Delete

Account Name	YouTube View Hierarchy	Account Owner	 Cari Aves [Change]
Account Site	San Bruno	Parent Account	Google
Type	Customer	Phone	(650) 253-0000
Website	http://youtube.com	Industry	Technology
Annual Revenue	\$4,000,000,000	Employees	6,000


Edit Delete

Related Contacts





New Contact Merge Contacts Add Relationship

Related Contacts Help ⓘ

Action	Contact Name	Account Name	Title	Direct	Email	Phone	Roles	Contact Owner Alias
Edit Edit Rel Delete	Susan Wojcicki	YouTube	CEO	✓	susan@google.demo	(650) 253-0000	Decision Maker; Executive Sponsor	javes
Edit Edit Rel Delete	Danielle Tiedt	YouTube	CMO	✓	danielle@google.mail	(650) 253-0000	Decision Maker	caves
Edit Edit Rel Remove	Larry Page	Alphabet Inc.	CEO	☐	lpape@google.mail	(650) 253-0000	Executive Sponsor; Influencer	caves



YouTube




Show Feed Click to add topics: ⓘ

« Back to List: Users

Related Contacts [3] | Opportunities [0] | Account Team [0] | Contacts [2] | Notes [0] | Files [0] | Cases [0] | Notes & Attachments [0] | Open Activities [0] | Activity History [0]

Account Detail

Edit Delete

Account Name	YouTube View Hierarchy	Account Owner	 Cari Aves [Change]
Account Site	San Bruno	Parent Account	Google
Type	Customer	Phone	(650) 253-0000
Website	http://youtube.com	Industry	Technology
Annual Revenue	\$4,000,000,000	Employees	6,000

Edit Delete

Related Contacts


New Contact Merge Contacts Add Relationship

Related Contacts Help ⓘ





Action	Contact Name	Account Name	Title	Direct	Email	Phone	Roles	Contact Owner Alias
Edit Edit Rel Delete	Susan Wojcicki	YouTube	CEO	✓	susan@google.demo	(650) 253-0000	Decision Maker; Executive Sponsor	javes
Edit Edit Rel Delete	Danielle Tiedt	YouTube	CMO	✓	danielle@google.mail	(650) 253-0000	Decision Maker	caves
Edit Edit Rel Remove	Larry Page	Alphabet Inc.	CEO	☐	lpape@google.mail	(650) 253-0000	Executive Sponsor; Influencer	caves

Users can only see contact relationships for contacts to which they have access

Account Contact Relationship Access



Susan Wojcicki



Show Feed Click to add topics: ⓘ

[Related Accounts \[2\]](#) | [Opportunities \[0\]](#) | [Notes \[0\]](#) | [Files \[0\]](#) | [Cases \[0\]](#) | [Assets \[0\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#)

Contact Detail

Edit Delete Clone Request Update


Name	Susan Wojcicki
Account Name	YouTube
Title	CEO

Edit Delete Clone Request Update





Related Accounts

Add Relationship

Action	Account Name	Account Site	Active	Roles	Relationship Strength
Edit Edit Rel	YouTube	San Bruno	✓	Decision Maker; Executive Sponsor	Strong
Edit Edit Rel Remove	Salesforce		✓	Influencer	Strong



Susan Wojcicki




Show Feed Click to add topics: ⓘ

[Related Accounts \[2\]](#) | [Opportunities \[0\]](#) | [Notes \[0\]](#) | [Files \[0\]](#) | [Cases \[0\]](#) | [Assets \[0\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#)

Contact Detail

Edit Delete Clone Request Update

Name	Susan Wojcicki	Contact Owner	 Joel Aves [Change]
Account Name	YouTube	Email	susan@google.demo
Title	CEO	Phone	(650) 253-0000

Edit Delete Clone Request Update

Related Accounts

Add Relationship

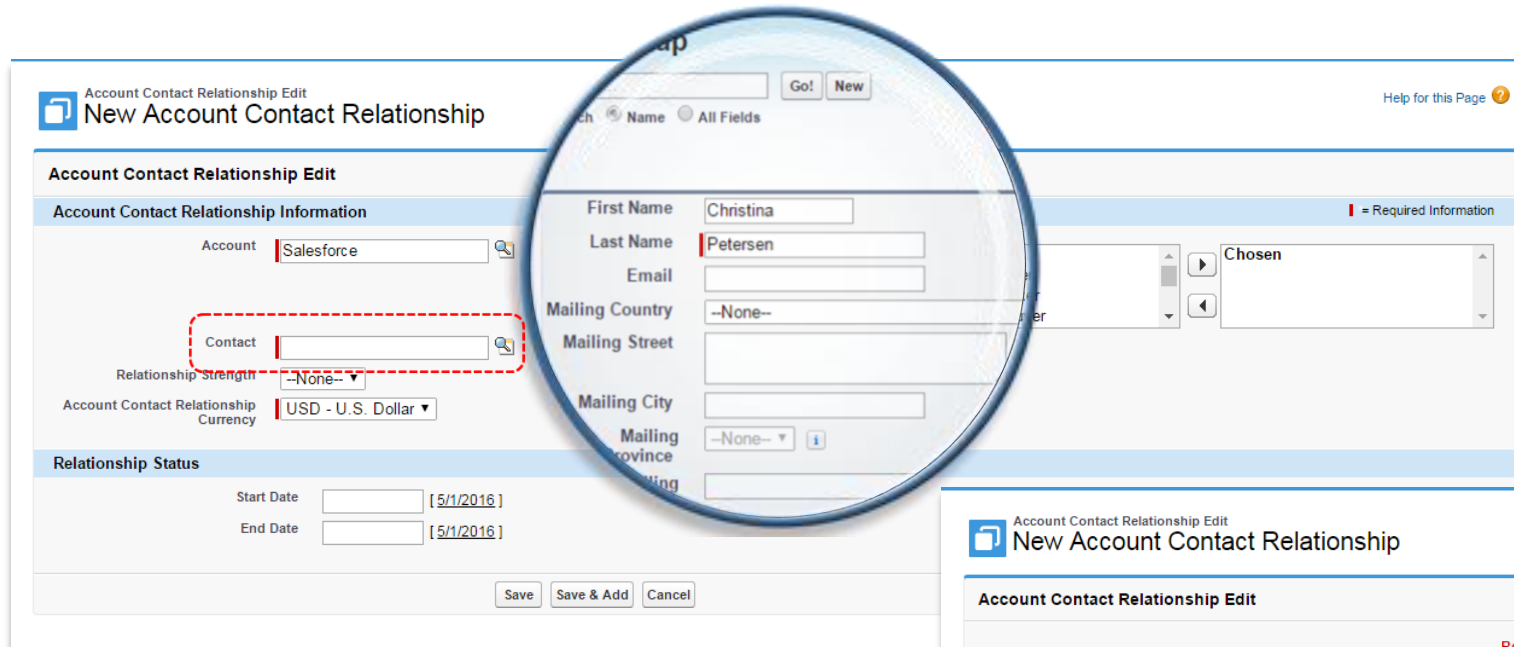
Related Accounts Help ⓘ

Action	Account Name	Account Site	Active	Roles	Relationship Strength
Edit Edit Rel	YouTube	San Bruno	✓	Decision Maker; Executive Sponsor	Strong
Edit Edit Rel Remove	Salesforce	San Francisco	✓	Influencer	Strong

Users without access to an account can only see information about the relationship

Limitations

Add Relationship>Create New from Contact Lookup



Account Contact Relationship Edit

New Account Contact Relationship

Account Contact Relationship Information

Account: Salesforce

Contact:

Relationship Strength: --None--

Account Contact Relationship Currency: USD - U.S. Dollar

Relationship Status

Start Date: [5/1/2016]

End Date: [5/1/2016]

Save Save & Add Cancel

First Name: Christina

Last Name: Petersen

Email:

Mailing Country: --None--

Mailing Street:

Mailing City:

Mailing Province: --None--

Mailing Postal Code:

Chosen

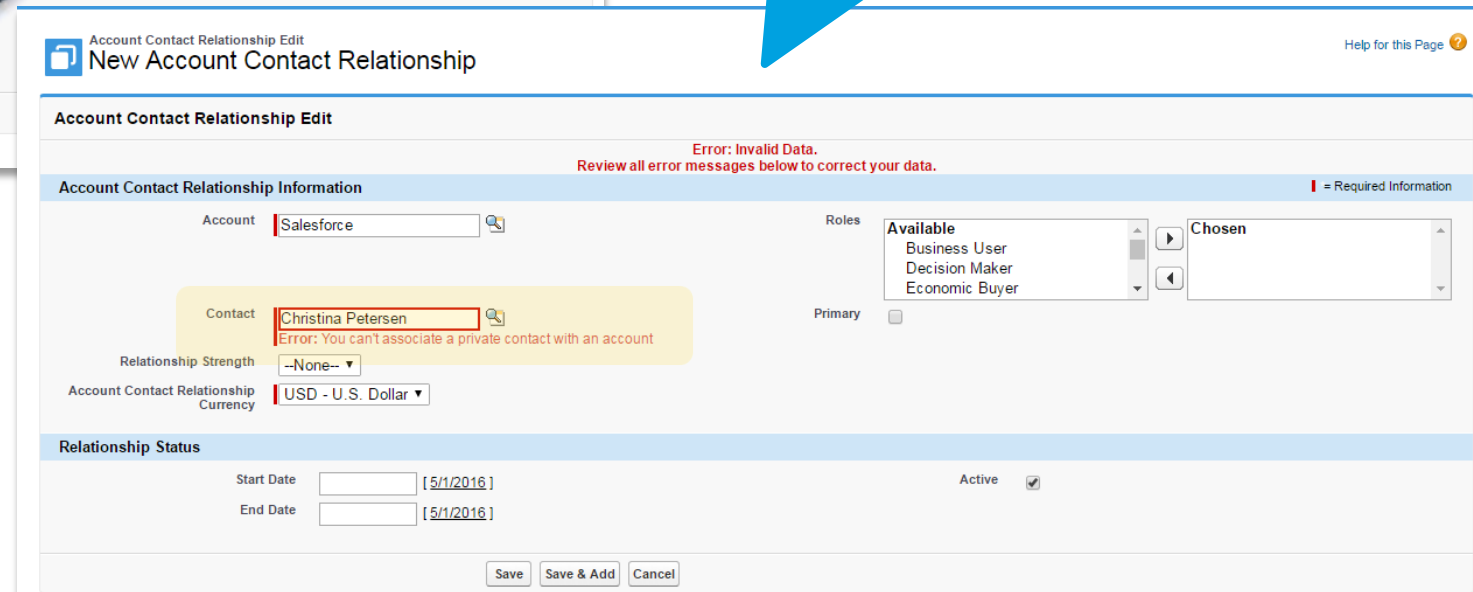
Go! New

Help for this Page

Search Name All Fields

! = Required Information

Quick create from lookup results in Private Contact which can't be part of an account contact relationship



Account Contact Relationship Edit

New Account Contact Relationship

Account Contact Relationship Information

Account: Salesforce

Contact: Christina Petersen

Relationship Strength: --None--

Account Contact Relationship Currency: USD - U.S. Dollar

Relationship Status

Start Date: [5/1/2016]

End Date: [5/1/2016]

Save Save & Add Cancel

Roles: Available Business User Decision Maker Economic Buyer

Chosen

Primary: ☐

Error: Invalid Data.
Review all error messages below to correct your data.

Error: You can't associate a private contact with an account

Active: ☒

Help for this Page

Add Relationship>Create New from Contact Lookup

Create Account Contact Relationship

Create Contact

Account Contact Relationship Information

* Account

Salesforce

* Contact

Search Contacts

- Carl Aves
Salesforce
- Parker Harris
Salesforce
- Marc Benioff
Salesforce
- Keith Lopez
Advanced Interconnections Corp
- + New Contact

End Date

Active ☒

Cancel Save

Create Account Contact Relationship

Review the errors on this page.

Account Contact Relationship Information

* Account

Salesforce

Roles

- Business User
- Decision Maker
- Economic Buyer
- Economic Decision Maker

* Contact

Christina Petersen

The selected contact already has a relationship with this account

Relationship Strength

--None--

* Account Contact Relationship Currency

USD - U.S. Dollar

Relationship Status

Start Date

End Date

Active ☒

Create new from lookup results in direct relationship being created as part of contact save

Related Contacts (6+)

New Contact Get More Contacts

Alex Johnson Account Name: Universal Services Title: VP Consulting Direct: <input type="checkbox"/>	Carl Aves Account Name: Salesforce Title: Director, Product Management Direct: <input checked="" type="checkbox"/>	Carl Aves Account Name: Salesforce.org Title: SE Direct: <input type="checkbox"/>
Christina Petersen Account Name: Salesforce Title: Product Manager Direct: <input checked="" type="checkbox"/>	Marc Benioff Account Name: Salesforce Title: Chairman & CEO Direct: <input checked="" type="checkbox"/>	Maynard Webb Account Name: Yahoo! Title: Chairman Direct: <input type="checkbox"/>

View All

Account Contact Relationship Access

The screenshot displays the Salesforce interface for a contact named Susan Wojcicki. The contact details include Name (Susan Wojcicki), Account Name (YouTube), and Title (CEO). The 'Related Accounts' section shows a table with the following data:

Action	Account Name	Account Site	Active	Roles
Edit Edit Rel	YouTube	San Bruno	<input checked="" type="checkbox"/>	Decision Maker; Executive
Edit Edit Rel Remove	Salesforce		<input checked="" type="checkbox"/>	Influencer

A red dashed box highlights the 'Salesforce' account in the table. A blue callout bubble points to this row with the text: "Sharing" of Account Name isn't currently supported in Lightning Experience or S1.

The right side of the interface shows the contact's profile card with fields for Title (CEO), Account Name (YouTube), Phone (650) 253-0000, and Email (susan@google.demo). Below this, the 'RELATED' section shows a list of related accounts, including YouTube, with fields for Account Site (San Bruno), Active status, and Roles (Executive Sponsor; Decision M...).

* Issue also occurs in Communities Napili Template



Considerations

Key Considerations for Contacts to Multiple Accounts

- What is your current solution? (duplicate contacts, Account Contact Roles, custom junction)
- What is your use case?
- What is your sharing model for Accounts and Contacts?
- Will you be migrating/consolidating data?
- What Salesforce functionality do you use today?
- What 3rd party applications do you use today?
- How will you address change management for your users?

Quick Comparison

Feature/Function	Contacts to Multiple Accounts	Account Contact Roles	Custom Junction Object
Standard Object	Yes	Yes	No
Sharing & CRUD	Derived from Account & Contact	Derived from Account	Configured Independently
Custom Fields	Yes	No	Yes
Custom Layouts	Yes	No	Yes
Platform Capabilities <i>(Record Types, Validation Rules, Field History)</i>	Not at this time	No	Yes
Business Process Support <i>(Workflow, Process Builder, Flow, Triggers)</i>	Only Flow at this time	No	Yes
API Accessible	Yes	Yes	Yes
View from Account & Contact	Yes	No – Account only	Yes
Single Related List	Yes	No	No
Multiple Relationship Rows	No	Yes	Custom
Reportable	Custom Report Types	Standard & Custom Report Types	Custom Report Types
Available Across All UIs	Classic, Lightning & Salesforce1	Classic & Salesforce1	Classic, Lightning & Salesforce1

Cross Functional Impact Areas

- Sharing/Record access
- Lookups
- Search
- Reporting
- API
- Activity roll up
- Files & Attachments
- Lead Conversion
- Account & Contact merge
- Delete/un-delete
- Quick Create
- Import Wizards
- De-dupe
- Data.com
- Mass email
- Campaign Members
- Pardot integration
- Salesforce for Outlook
- Salesforce to Exchange
- Mobile
- Community Users
- CTI
- S2S
- Partner apps
- Data Loader
- Web to Case
- Email to Case
- Assets & Entitlements
- Encryption
- 3rd Party Integrations
- And more...

** This is just a sampling of areas to consider*





Roadmap

What's Next for Contacts to Multiple Accounts?

- Platform capabilities on Account Contact Relationship
Custom Actions, Validation Rules, Triggers
- Person Accounts as part of an account contact relationship
Person Accounts as a “related contact” on a business account
- Enhanced navigation
View relationship details with new record home page

Beyond Winter '17

- Additional platform capabilities on Account Contact Relationship
Workflow, Process Builder, Field History, Record Types
- Display secondary contacts in standard report types
Account Contact reports only show 1:M relationships
- Primary Contact designation
Identify the key contact at an account
- Enhanced Account & Contact Merge
Allow merging of accounts or contacts where multiple relationships exist
- Enhanced Contact reparenting behavior
Allow user choice to save previous primary account relationship
- Search contacts across accounts
Return all contacts for an account or vice versa
- Dependent lookup fields (context aware)
Display related contacts for an account or vice versa
- Expanded Metadata API support
Read and update account contact relationship settings





Questions

Answers to Frequently Asked Questions

- Available in all Salesforce CRM editions except database.com
- Available for use in Salesforce Classic, Lightning Experience and Salesforce1
- Not enabled by default, administrator has control to turn on/off
- Will not contribute toward data storage counts for an org
- Independent of Account Contact Roles, you will not lose any existing data
- Data is not automatically migrated from Account Contact Roles

➤ Additional Resources

Where to Find More Information

Release Notes: see the [Contacts to Multiple Accounts](#) topics

Help & Training: standard [help content and product videos](#) – coming soon

Event Recordings: [Premier Expert Hour](#) webinar and presentation

Implementation Guides: watch for a new [Workbook](#) covering Contacts to Multiple Accounts

Success Community Groups: join the [Salesforce People](#) group

Trailhead Modules: [tbd](#) – stay tuned!



thank you