Account

An Account is a business entity, it's a company. We need insight into our business and our data and that starts with the people we're doing business with. We can store information about our customers using accounts and contacts. Accounts are companies that we're doing business with.

An Account is an organization that is a qualified potential customer, an existing customer, partner, competitor, or has a relationship of similar significance.

Accounts should be created for organizations (companies, nonprofits, foundations), Individuals.

The account is the glue that holds the relationships (contacts) and interactions (activities, opportunities, cases, etc.) with an organization.

The standard Salesforce account is configured for B2B (business to business) relationships.

One account = one organization

Business account is the combination of contacts and account.

We also have Person accounts in Salesforce which is used by B2C organizations. Person accounts are oriented towards doing business with persons while other is with the companies. To use Person accounts we have to ask Salesforce to enable it for our org and we also cannot revert it back.

One person account = one person

Person and business account have a few important differences:
- Person accounts are forever. After they're turned on, we can't turn them off.
- If our organization uses both business accounts and person accounts, we'll have to select which type of account we're creating whenever we add an account.
- Person accounts can't have contacts.
- Person accounts don't have an account hierarchy.
- We can't get account insights for person accounts (but we can associate person accounts with social network profiles by using the Social Accounts, Contacts, and Leads feature).

Important Fields

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1. Parent Account:
   This is a self-relationship field. It relates 2 accounts with each other. The parent account is selected from the lookup dialog and the one on which the field exists is the child account. A parent account can't be a child of itself.
2. Account Name:
   The name of the company or the person (in case of person accounts) with whom we are doing business.

Related Lists

Account Team

An account team is a team of users who work together on an account.

Account Teams help multiple users to better collaborate on accounts by defining a role for each team member, setting record-level access individually, and viewing teams in list views and reports.

Account team can be built for each account.

To display Account Team related list on accounts we need to enable it from the setup menu.

When selecting an account team member, specify the role that the person plays on the account.

Depending on our sharing model, we can specify each account team member's level of access to the account and any contacts, opportunities, or cases associated with that account. That way, we can give some team members read-only access and others read/write access.

We can also set up a default account team that includes the people who we normally work with on our accounts.

We can edit the Team role picklist according to the assigned roles.

We can only add users as team members on the account team.

Partners

It shows all the partners (another accounts) involved with that account. Account can't be partner with its own account.

One account can be a partner with different accounts with their respective roles. These roles can be edited by the system administrator in the setup menu.

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Notes:

1. An account can’t be deleted if it is associated with some case or contract.
2. If we delete the account, then contacts & opportunities related to it will also be deleted.
3. If we delete the parent account, then the child account will not be deleted.

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