

# LeanData Routing

Using Person Accounts with LeanData



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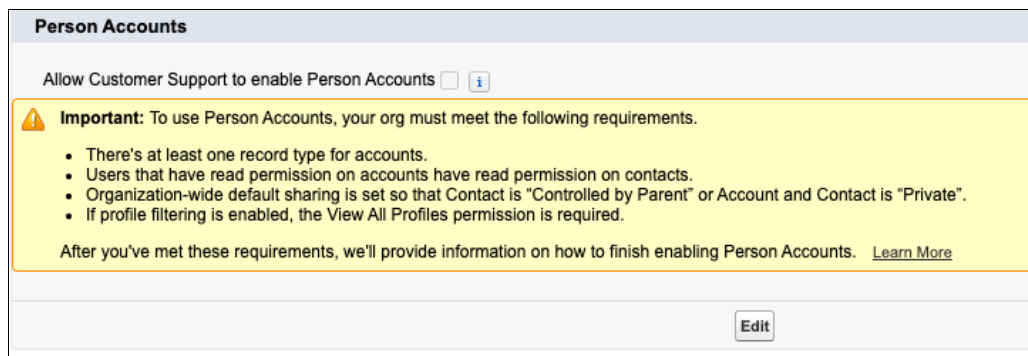
## Overview

LeanData has support for Person Accounts if you are selling B2C instead of or in addition to Business Accounts. A Person Account stores information about an individual. Person Accounts are used when selling to individuals rather than companies. Business Accounts are used when selling to businesses or Organizations.

A Person Account is a combination of specific Account and Contact fields into 1 record. Person Accounts are recognized as Account objects in Salesforce. These Accounts need to be enabled in your Salesforce Organization and they cannot be disabled once they have been enabled. The process to enable Person Accounts requires multiple steps.

## Enabling Person Accounts

Once you enable Person Accounts, they cannot be disabled. Per Salesforce, these conditions must be met to enable Person Accounts.



### Record Type Requirement:

1. Setup > Accounts > Record Types > New.
2. Create a new record type for your business. This can be anything (e.g. Person\_Account)

### User Permissions Requirement:

1. Setup → Manager Users → Profiles.
2. Users that have read permissions on accounts have read permissions on Contacts.

For most cases, this should already be done by default.

### **Org-wide Default Sharing Requirement:**

1. Setup > Security Controls > Sharing Settings.
2. Ensure that Contact is under 'Controlled Parent' or Account and Contact is 'Parent' for the 'Default External Access' column.

### **Next Steps**

Once all of the above has been met, contact Salesforce Support and submit a ticket to have Person Accounts enabled. Grant login-access to Salesforce Support in your org. Verify the Person Account Record Type has been created.

## Supported Features in LeanData

This section details the LeanData features that support Person Accounts.

### Matching and Lead Router

Use the Lead to Account (L2A) Node to match a lead to a Person Account. The Lead to Account matching criteria can be applied to Person Accounts:

- Exact Company Name - Account Name = Match
- Close Company Name - Account Name + one other criteria = Match

### Tiebreaker Rules

Tiebreakers are used when more than one account is being considered as a match for the Lead.

When comparing two Person Accounts, the tiebreakers work just like they do when comparing two Business Accounts. The default, out of the box tiebreakers will choose the account with the minimum Created Date.

When comparing a Person Account to a Business Account, the tiebreaker rule, Maximum Number of Contacts will favor Person Accounts. In Salesforce, Person Accounts have a number of Contacts equal to 1 by default. Business Accounts have a number of Contacts set to 0. This only occurs when the tiebreakers compare a Person Account to a Business Account. When comparing 2 Business Accounts, Maximum Number of Contacts, will look at the number of Contacts related to the Business Account.

## Account Router

Person Accounts can be routed through the New or Update trigger in the Account Router. When a Lead that is not matched to a Person Account is manually converted through SFDC, the Lead becomes a Person Account and is routed through the Account Router.

Person Accounts cannot be created with a Create Account node in the Account Router Graph. Currently, Person Accounts can only be created directly in Salesforce.

When Person Accounts are routed, some fields like the Parent Account field belonging to Business Accounts are accessible in LeanData. These fields should not be referenced for routing Person Accounts or you will receive an error. This issue will be addressed in a future release.

## Tagging

When Tagging a Lead from a Person Account, please confirm that your Mapped Account Fields have been set up and are tagging as expected. Tagging will occur when one of these 2 conditions are met:

- Domain matching is on and the Lead's email address/website matches a domain on the Person Account.
- The Lead's Company Name matches the Person Account's Name.

## Summary

With Person Accounts enabled and using LeanData, you have the following capabilities:

- Newly created Person Accounts can be routed through Account Router.
- Can match Leads based on domain name or company name (exact match + approximate match).
- Can convert Leads matched to PAs (Lead becomes the PA) in LD.
- Can route a PA newly converted from a lead through Account Router.