Use Case: Adding Person Accounts as Campaign Members

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Overview

This document explains how to build a Salesforce Connector to add Person Accounts directly to your Campaigns in Salesforce.

In Salesforce, some businesses deal with companies, but many others deal directly with individual people, like customers, students, or patients. These individuals are stored as "Person Accounts." Our goal is to easily get these people into your Campaigns so you can track how you're reaching out to them.

In this document you will see a quick explanation on the difference between Person Accounts and regular accounts in Salesforce, and then how to connect a form to Salesforce so that the person's information goes right into your Salesforce system as a Person Account, and they are automatically added as a member of a specific Campaign.

Adding a Person Account as a Campaign Member

When you use Person Accounts in Salesforce, think of them as a combination record that is both an Account and a Contact, all rolled into one.

However, certain Salesforce records and features, such as Campaign Members, are designed to directly link only to a Contact record, not explicitly to a Person Account. Despite a Person Account inherently representing an individual, parts of Salesforce might not "see" it that way.

If you need to connect a Person Account to one of these "Contact-only" records, here's the trick:

1. **Find the Person Account:** The Salesforce Connector first identifies the target Person Account record in Salesforce.

2. **Get its hidden Contact ID:** Upon locating the Person Account, the Connector extracts the internally linked Contact ID from that Person Account record.

3. **Use the Contact ID:** This retrieved Contact ID is then used to establish the connection with the Salesforce record that mandates a Contact, such as creating a new Campaign Member record.

This way, you can still connect your Person Accounts to all the necessary places in Salesforce, even if they're looking for a traditional Contact record. You'll see these steps in action below as we detail how to add a person account as a campaign member record.

Update a Person Account

The first step to adding a person account as a campaign member to a campaign is to locate, update, or create a person account.

- **Step 1:** Open the Salesforce Connector on your Form

- **Step 2:** Select to Update an Account Record

- **Step 3:** Lookup Criteria

    - Define how the connector will find the Person Account. Use a unique identifier such as Email, Account Name, or Account ID.

- **Step 4:** Map the following required fields. Include any other relevant fields as needed.

    - First Name

    - Last Name

    - Email

    - Record Type ID

        - This field is crucial for identifying the record as a Person Account. Obtain the specific Record Type ID for your Person Accounts from Salesforce (e.g., by navigating to Object Manager > Person Account > Record Types and inspecting the URL for the ID).

THESE SALESFORCE FIELDS:	GET THEIR VALUE FROM:
First Name	First Name
Last Name	Last Name
Email	Email
Record Type ID	Formula = 012gL000001EKzB

+ Map Another Field

Lookup a Contact Record

Because Campaign Members require a Contact ID, this step identifies the Contact record inherently linked to the Person Account found or created in the previous step.

- **Step 1:** Add a Lookup Contact Record

- **Step 2:** Lookup Criteria

  - **Salesforce Field:** Select Account ID on the Contact object.

  - **Comparison:** Set this to "Equals the ID of an Object Above".

  - **Reference:** Select the "Update Account" step you configured previously. This tells FormAssembly to find the Contact whose Account ID matches the ID of the Person Account from the first step.

1.1 - Lookup Contact record			✏ Edit ▾

LOOKUP #2

Find a *Contact* record using:
☁ Account ID = Record ID of *1. Account*

IF NO MATCH	IF ONE MATCH	IF MULTIPLE MATCHES
Skip this object and any dependent	Continue with dependent objects	Continue with most recent record

Update a Campaign Member Record

This final step establishes the connection between the Person Account (via its Contact ID) and the target Campaign. Using "Update" is recommended here to prevent duplicate Campaign Members if the person is already associated with the campaign.

- **Step 1:** Add an Update Campaign Member Record

- **Step 2:** Lookup Criteria

  - **Salesforce Field:** Select Contact ID on the Campaign Member object.

- **Comparison:** Set this to "Equals a Lookup ID".

- **Reference:** Select the "Lookup Contact" step you configured (the one that found the Contact record associated with the Person Account). This ensures FormAssembly looks for an existing Campaign Member record linked to that specific Contact ID.

- **Step 3:** Map the following required fields, along with any other desired Campaign Member fields:

  - **Campaign ID:** Map this to the Salesforce ID of the specific Campaign you are adding members to. This can be a fixed value or dynamically pulled from the form.

  - **Contact ID:** Map this to the Contact ID field from your "Lookup Contact" step. This is critical for linking the correct person. (To do this, select the option to map to a "Lookup ID" and then choose your "Lookup Contact" step).