Person Accounts in Lightning Experience

Spring 17 Release

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Person Accounts in Lightning Experience

What to Expect in Spring ‘17

This release removes the “beta” classification of person accounts in Lightning Experience, however there are still a few known limitations.

The following slides highlight what you can expect when accessing person accounts in Lightning Experience in Spring ‘17. Please note that many of the limitations highlighted will be resolved in a future release.

Note that the **limitations are solely related to usability** as person accounts may have different behavior in Lightning Experience in comparison to Salesforce Classic. There are **no issues with regard to creating and managing person account records in Lightning Experience**.

Setup Limitations

Person Accounts in Lightning – Spring ‘17

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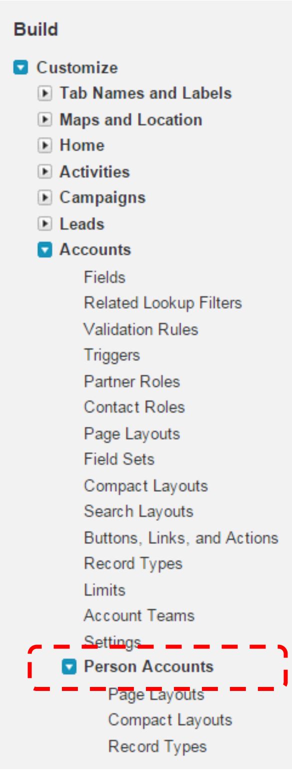
Missing Setup Node in Object Manager

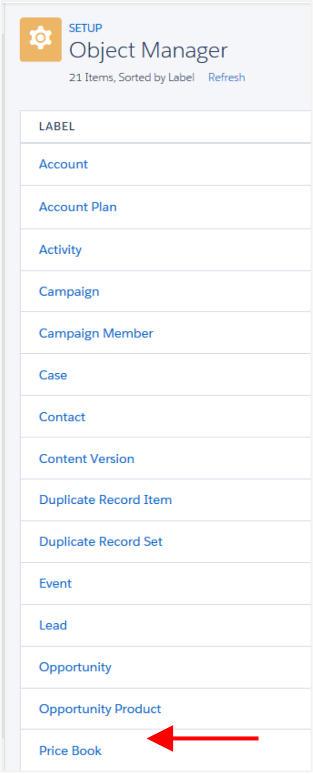
In **Salesforce Classic**, Person Accounts setup displays as a sub-node of Accounts

In **Lightning Experience**, there is no option for Person Account option in the Object Manager

Workaround:

Continue to use Salesforce Classic Setup for Person Accounts





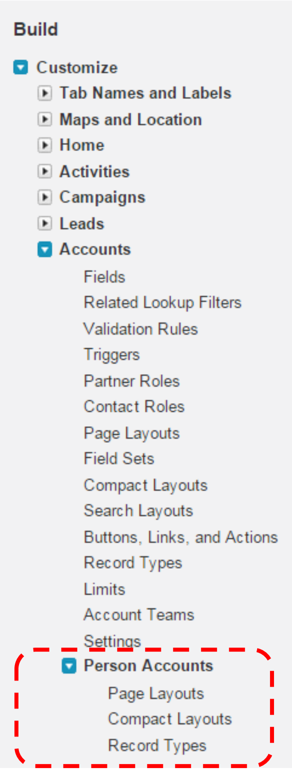
Setup Elements Displayed in Accounts Object Manager

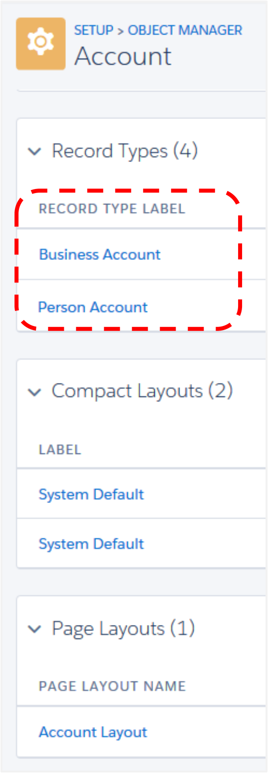
In **Salesforce Classic**, Person Account setup elements like layouts and record types are displayed in a separate Person Accounts node

In **Lightning Experience**, Person Account setup elements are not available or are displayed in the Account Object Manager page

Workaround:

Continue to use Setup in Salesforce Classic for Person Accounts





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No Person Account Fields Displayed in Setup

In **Salesforce Classic**, Person Account fields are displayed in the Accounts | Fields page

In **Lightning Experience**, Person Account fields are not displayed in the Fields & Relationships section of the Account Object Manager page

Workaround:

Continue to use Setup in Salesforce Classic for Person Accounts

Account Standard Fields

Action	Field Label
	Account Name
Edit | Replace	Salutation
	First Name
	Last Name
Edit	Account Number
Edit	Account Owner
Edit	Account Record Type
Edit	Account Site
Replace | Edit	Account Source
Edit	Annual Revenue
Edit	Assistant
Edit	Asst. Phone
	Billing Address
Edit	Birthdate
	Created By
Edit	Data.com Key
Edit	Department

Fields & Relationships (25)

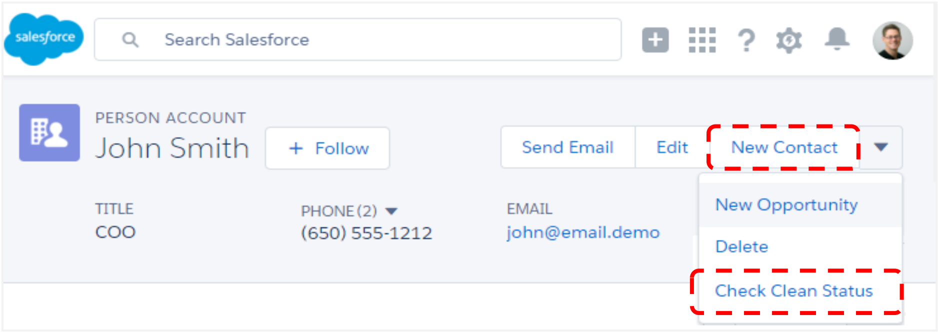
FIELD LABEL	FIELD NAME
Account Name	Name
Account Number	AccountNumber
Account Owner	OwnerId
Account Record Type	RecordTypeId
Account Site	Site
Account Source	AccountSource
Annual Revenue	AnnualRevenue
Billing Address	BillingAddress
Created By	CreatedById
Data.com Key	Jigsaw
Description	Description
Employees	NumberOfEmployees
Fax	Fax
Industry	Industry

Invalid Actions Available for Person Account Layouts

In **Lightning Experience**, Salesforce1 Actions in the Page Layout Editor include default actions that are not valid for person accounts.

For example, New Contact and Check Clean Status

Clicking unsupported actions for a person account can result in an error



Workaround:

Remove invalid actions from the Salesforce1 and Lightning Experience Actions section in Person Account page layouts

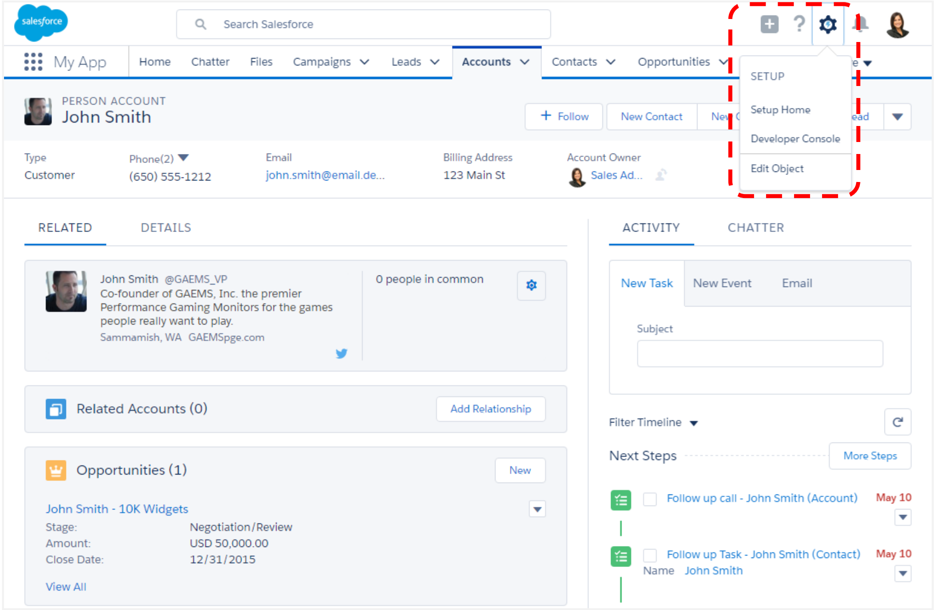
* This is an issue for other entities too, it is not person account specific. Included here as guidance for migrating to Lightning.

Fixed Spring 17

Person Account Lightning Page Not Editable

In **Lightning Experience**, administrators previously didn't have the ability to create and edit Lightning Experience record pages for Person Accounts

This capability is now available as part of the Spring 17 release, therefore you will now see the Edit Page option in the Setup menu drop down when viewing the Person Account Record Home page



Resolution:

When you create a Lightning Page for accounts and assign it as the default for either an org or an app, the page becomes the default for both business accounts and person accounts.

To display a custom record page for person accounts, create a custom account record page and then assign it to the person account record type

End User Limitations

Person Accounts in Lightning – Spring ‘17

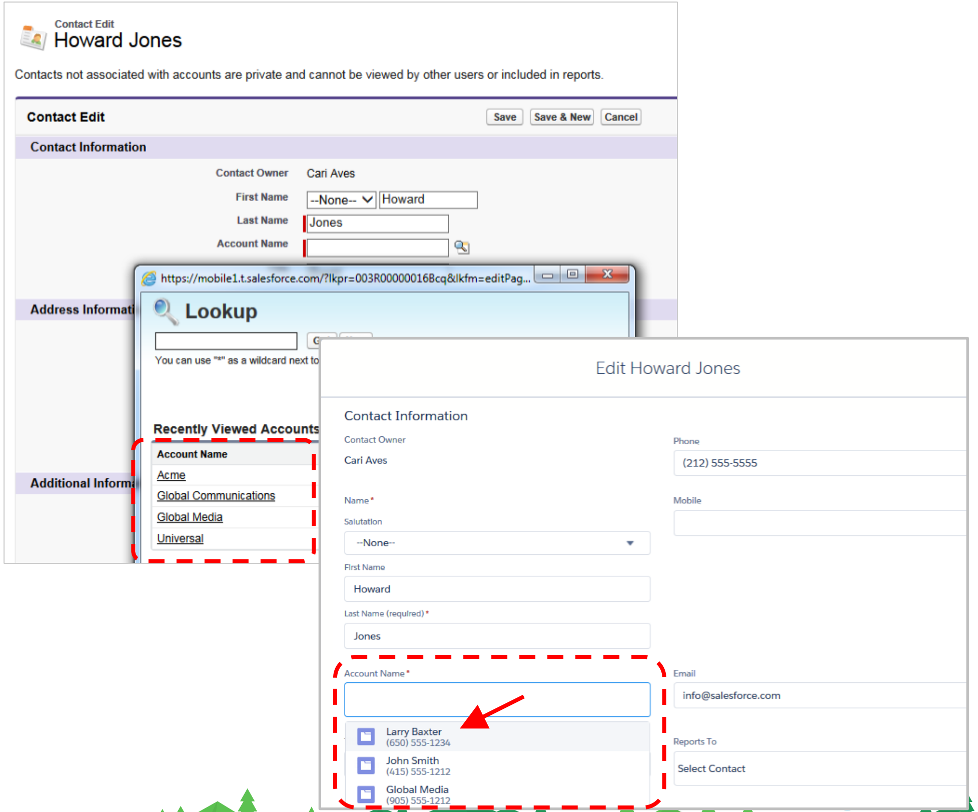
Fixed Summer 16

Person Accounts in Unsupported Lookup Fields

In **Salesforce Classic**, person accounts are filtered out of Lookup fields where they aren't applicable

For example the Account field and Reports To field on Contact as well as Parent Account field on Account

In **Lightning Experience**, person accounts are displayed in all Account and Contact Lookups and if selected where they are not applicable a validation error will occur on save



Resolution:

Person Accounts no longer display in Lookup fields where they aren't applicable

Fixed Summer 16

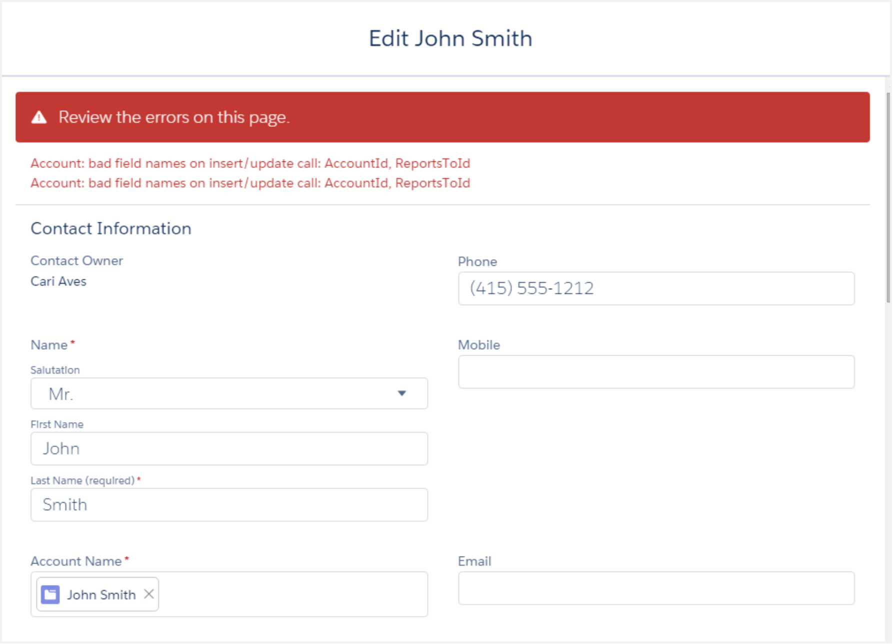
Redirect Unsupported in Community Builder Templates

In **Communities** created from a Community Builder–based template, users are sometimes navigated to the contact portion of a person account record

Specifically, when a user clicks on a person account from a Contact lookup field, they're redirected to the person contact record instead of the person account

Resolution:

Users will now be redirected to the person account record no matter if that person account is behaving like a contact or an account



Fixed Summer 16

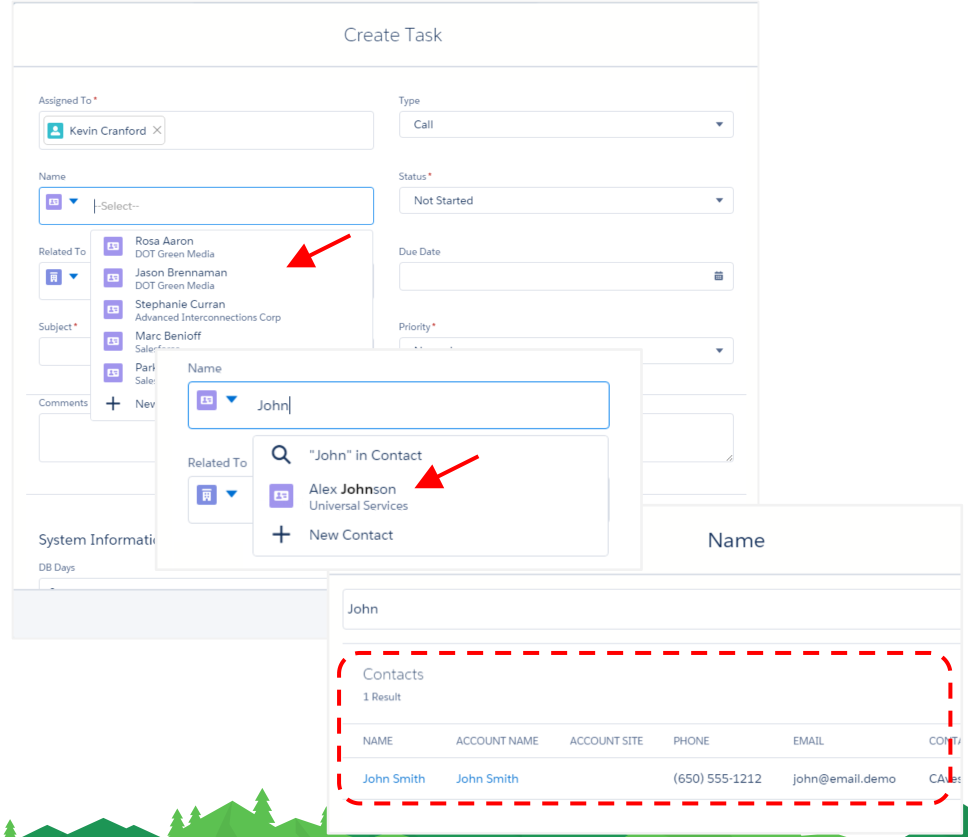
Person Accounts Don’t Display in Contact Lookup MRU

In **Salesforce Classic**, person accounts are displayed in the recent records list of both Account and Contact Lookup fields where applicable

In **Lightning Experience**, person accounts are displayed in the type ahead and recent records list for Account Lookups only

Resolution:

Person accounts are now displayed in Contact Lookups using type ahead



Fixed Winter 17

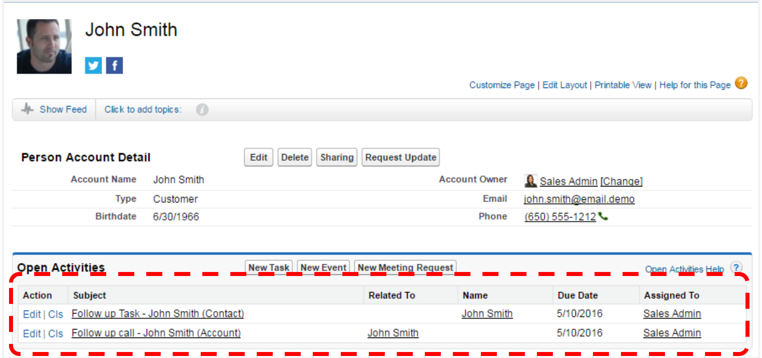
All Activities Not Displaying for Person Accounts

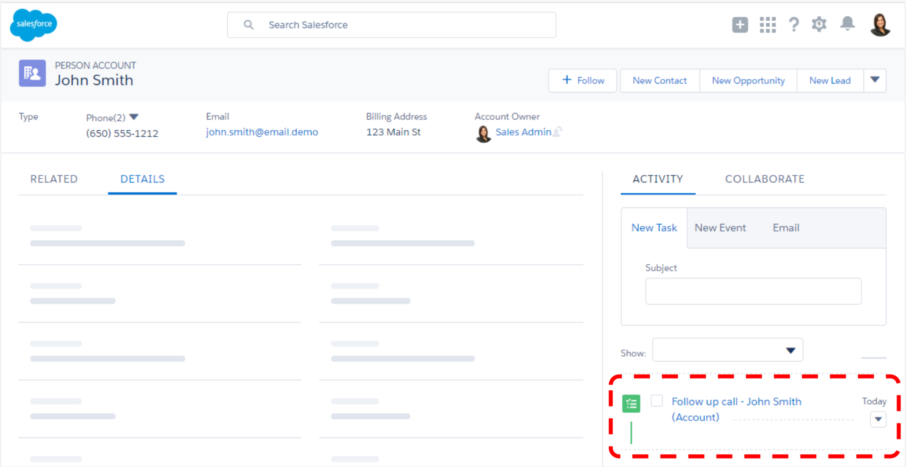
In **Salesforce Classic**, the Activities related lists for a person account displays activity records where the Person Account is displayed in either the “Name” field or the “Related To” field

In **Lightning Experience**, the activity only displays where the person account is displayed in the “Related To” field

Resolution:

All activities for a person account now display in the Activity Timeline whether the person account is noted in the Name or the Related To field





Fixed Spring 17

Incorrect Quick View for Person Accounts

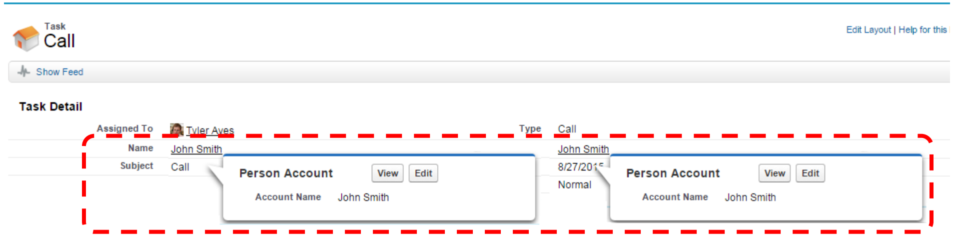
In **Salesforce Classic**, the hover for a person account always displays the Account Preview whether the Person Account is displayed in a “contact” field or an “account” field

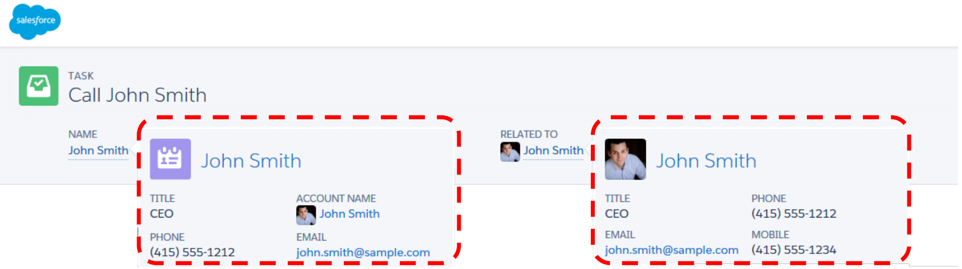
For example, the Name or Related To field on an activity

In **Lightning Experience**, when the person account is displayed in a “contact” field the Quick View displayed is the Contact Preview

Resolution:

The same fields are displayed in the Quick View when hovering over a person account in a “contact” field or an “account” field





Fixed Spring 17

Person Account Fields Not Shown in Merge Field Selector

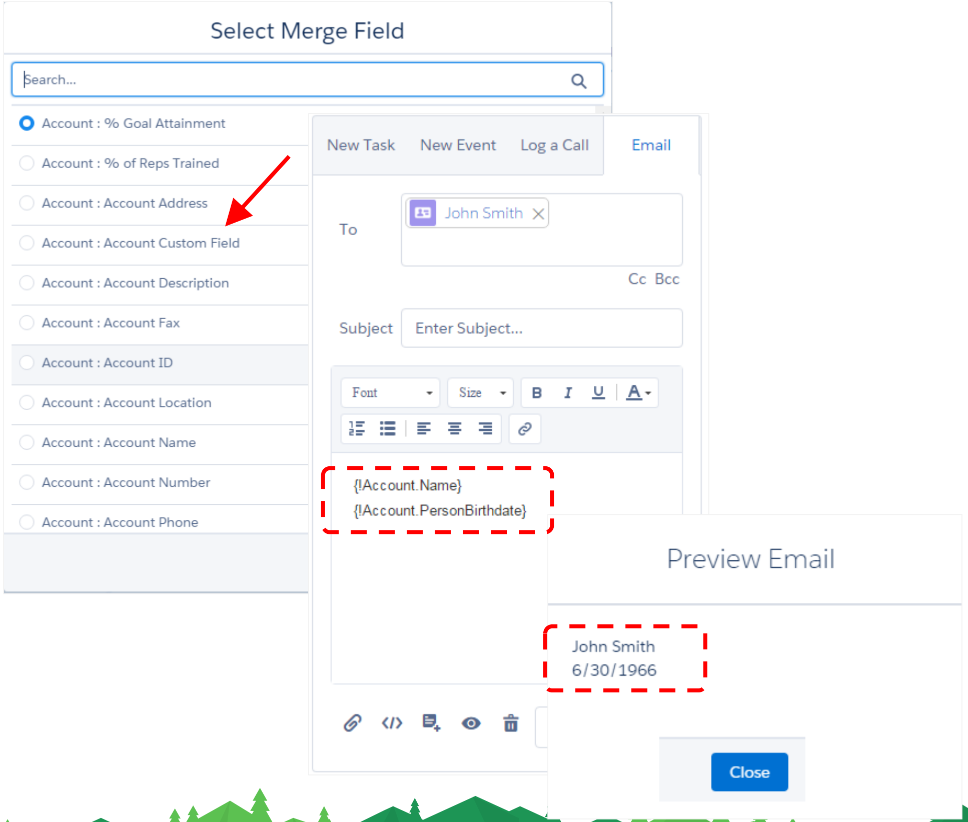
In **Salesforce Classic**, when creating an email template both account and person account fields are available to be selected as merge fields

In **Lightning Experience**, when creating an email template person account fields aren’t available in the merge field selector

Resolution:

Users will now see Person Account fields listed in the merge field selector in Lightning. Person Account specific fields are prefaced with “Person Account:” similar to what you see in Report Builder

For example, Person Account: Birthdate

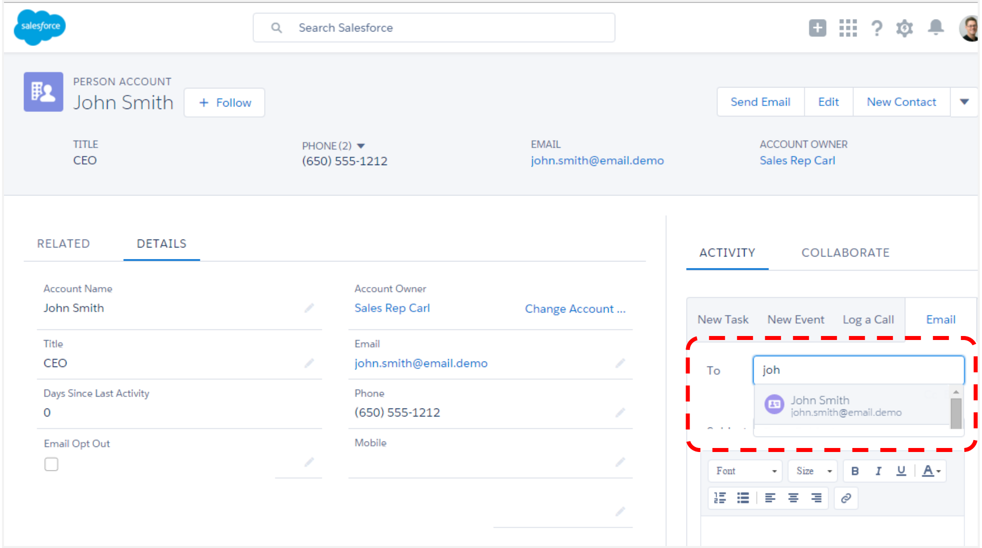


Future Release

Email To Field Not Auto Populated for Person Accounts

In **Salesforce Classic**, when creating an email from a person account record, the To field auto-populates with the person account

In **Lightning Experience**, when creating an email from a person account record, the To field doesn’t auto-populate with the person account



Limitation & Workaround:

Users may be confused by this behavior since the To field auto-populates when creating an email from a contact record in Lightning Experience

Instruct users to manually enter the person account in the To field

Targeted Summer 17

All Cases Not Displaying for Person Accounts

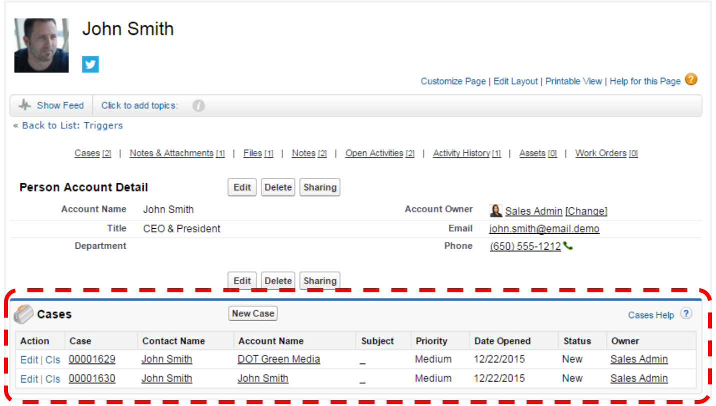
In **Salesforce Classic**, the Cases related lists for a person account displays case records where the Person Account is displayed in either the “Contact Name” field or the “Account Name” field

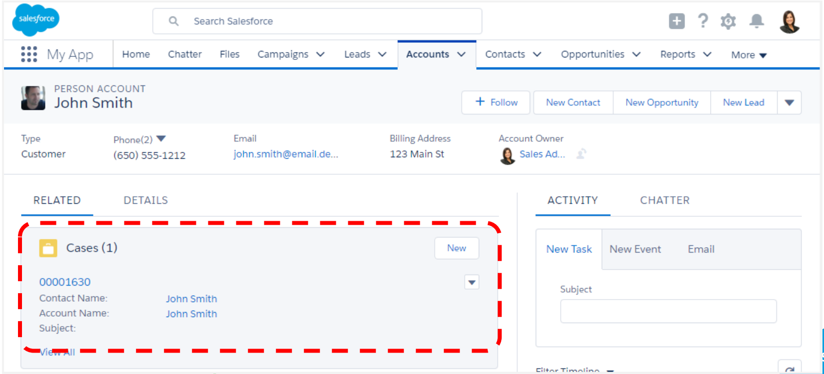
In **Lightning Experience**, the case only displays where the person account is displayed in the “Account Name” field

Limitation & Workaround:

Users may think that the case records are missing

Ensure users include the person account in the Account Name field on all cases. This is done by default if the case is created from the Cases related list on the Person Account record OR if no other account is populated in the Account Name field when creating a case





Targeted Summer 17

All Notes Not Displaying for Person Accounts

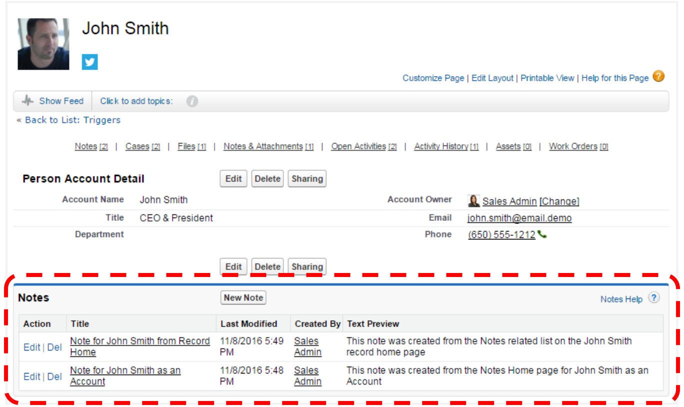
In both **Salesforce Classic** and **Lightning Experience**, the Notes related lists for a person account displays note records where the Person Account is selected as a Related: Account

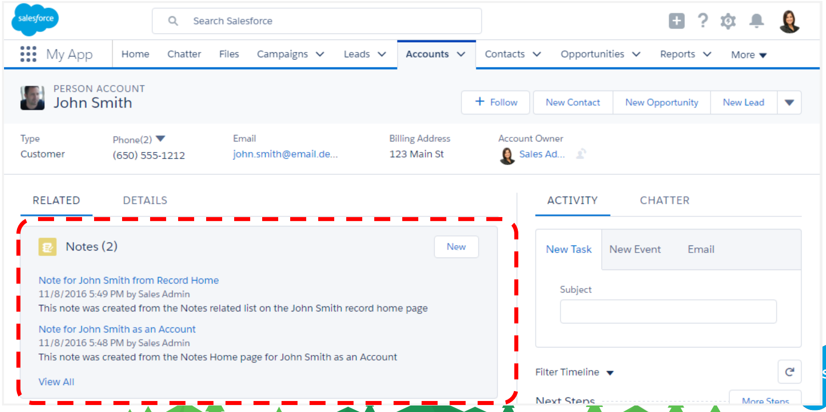
If the Person Account is selected as a Related: Contact on a note record it will only display in the Notes home page

Limitation & Workaround:

Users may think that the note records are missing

Ensure users create notes from the Person Account record. If creating a note using the New Note Global Action or from the Notes Home page **use the Related: Account to associate a Person Account to a note** .

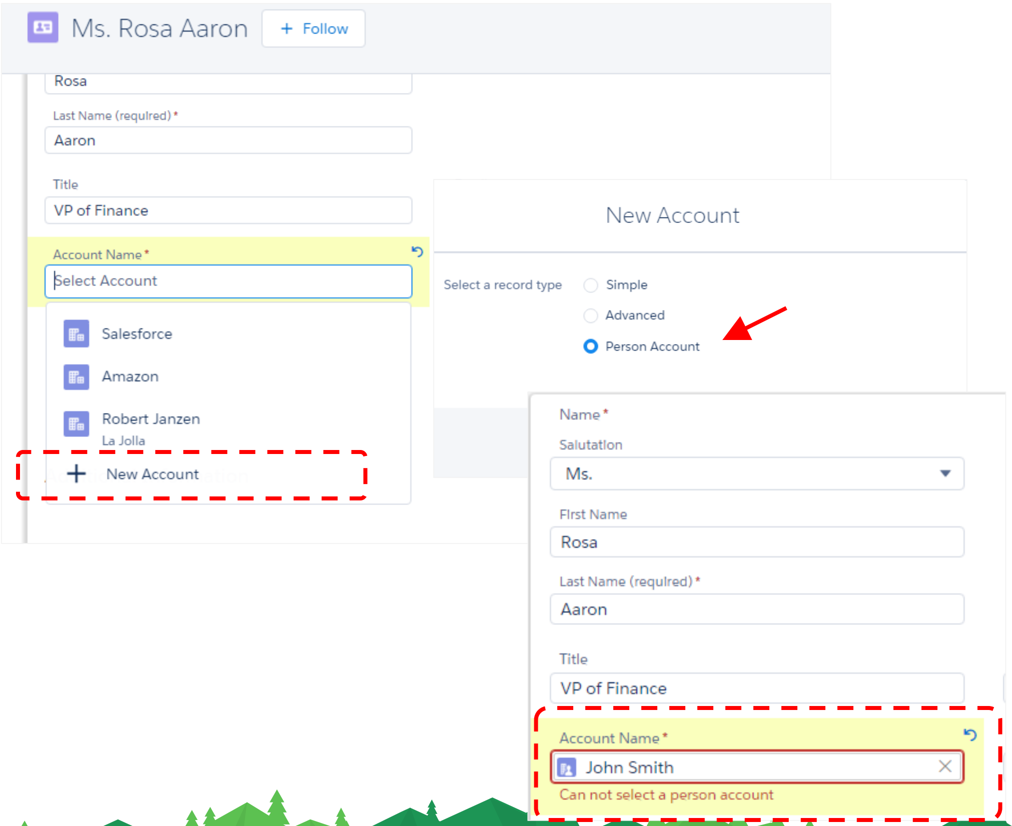




Create Account from Lookup Allows Person Account

In **Salesforce Classic** , when creating a new account from the Account Name lookup field on a contact the default Business Account Record Type is automatically selected

In **Lightning Experience**, the user is prompted to select a Record Type and both Business Account and Person Account record types are available to select



Limitation:

Users may be confused by the option to select a Person Account record type and will encounter an error when saving the contact record if the new account created is a person account

Changes in Behavior

Person Accounts in Lightning vs. Salesforce Classic

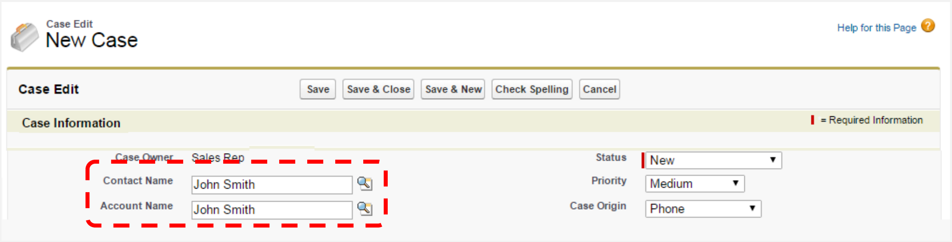
Person Account Not Auto Populated in Case Account Field

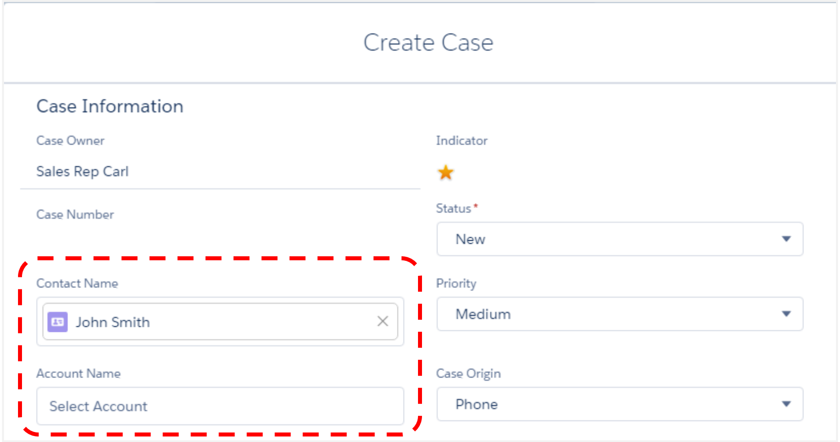
In **Salesforce Classic**, when creating a case from the Case Home Page and a person account is selected as the Contact the Account Name field is immediately auto-populated with the person account

In **Lightning Experience**, when creating a new Case record from the Case Object Home and a person account is selected as the Contact the Account Name field is not automatically populated with the person account until save

Consideration:

Ensure users are aware of the difference in behavior and that the Account Name field will only auto-populate so long as no other value is entered prior to save





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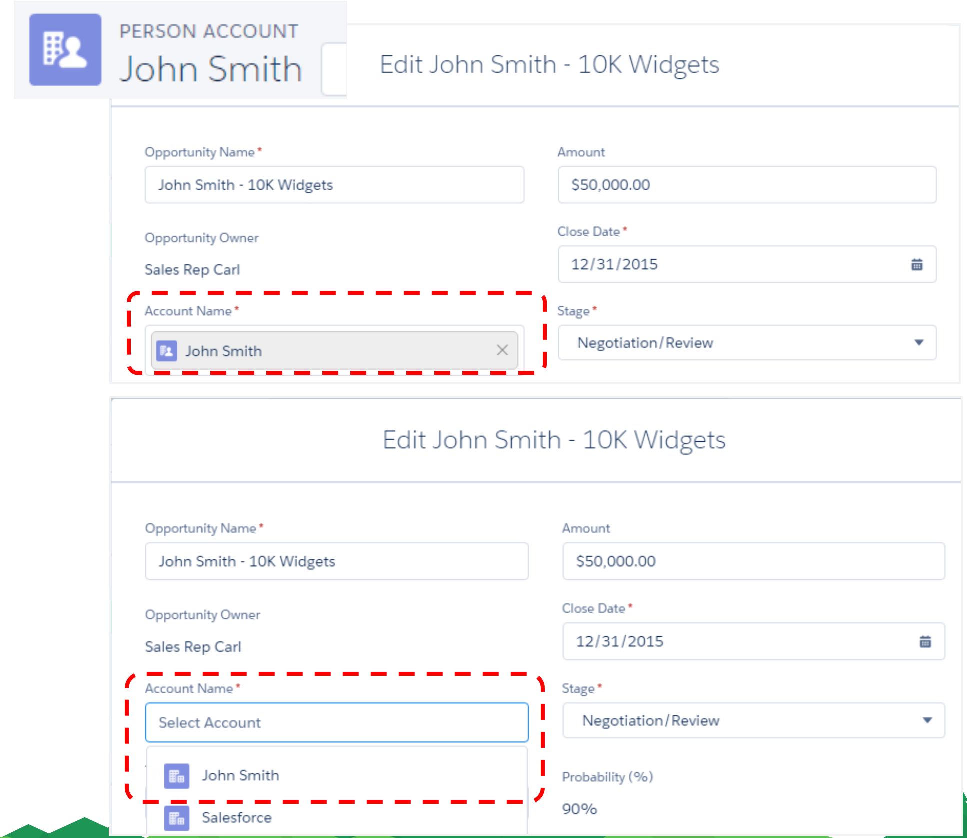
Inconsistencies in Icon Displayed for Person Accounts

In **Lightning Experience**, icons display in more locations and users will sometimes see the Account or Contact icon displayed for a person account

For example, in Account Lookup fields or Global Search MRU

Consideration:

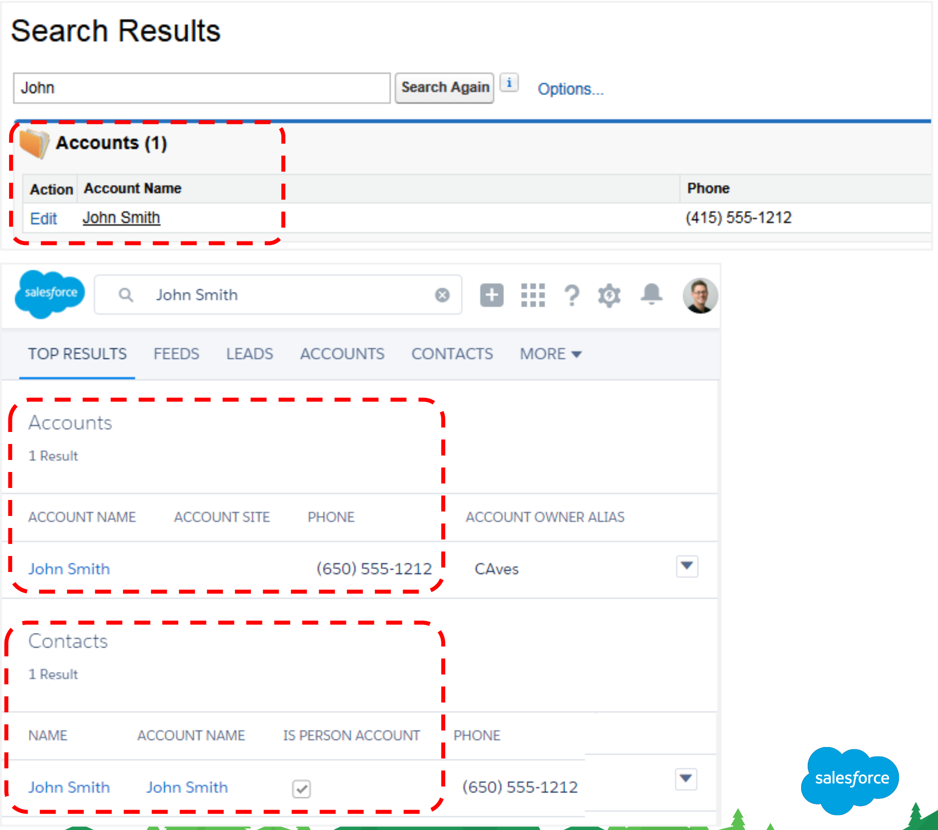
Users may be confused by the display of different icons. Ensure they are aware of the behavior and that this is the same record no matter which icon displays



Person Accounts Now Returned in Contact Search

In **Salesforce Classic** , person accounts are filtered out of Contact Search results

In **Lightning Experience** , person accounts are returned in both Account Search and Contact Search results



Consideration:

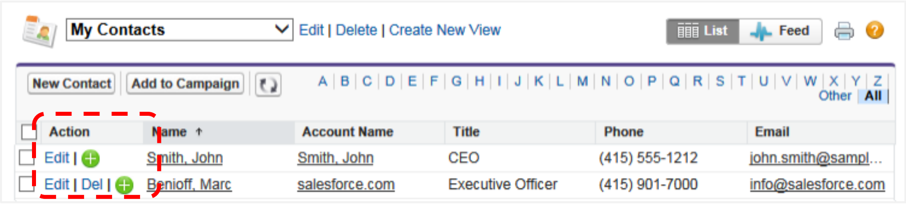
Ensure users are aware of the change in behavior

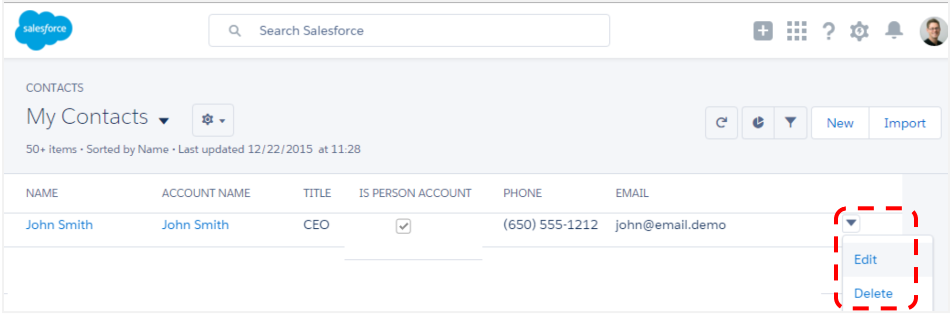
* This is a change in behavior from Salesforce Classic

Added Actions for Person Accounts in Contact List Views

In **Salesforce Classic** , when person accounts are included in Contact List Views only the Edit action is available

In **Lightning Experience** , when person accounts are included in Contact List Views both the Edit and Delete actions are available





Consideration:

Ensure users are aware of the change in behavior

Email Blocked if Contains Business Account Merge Fields

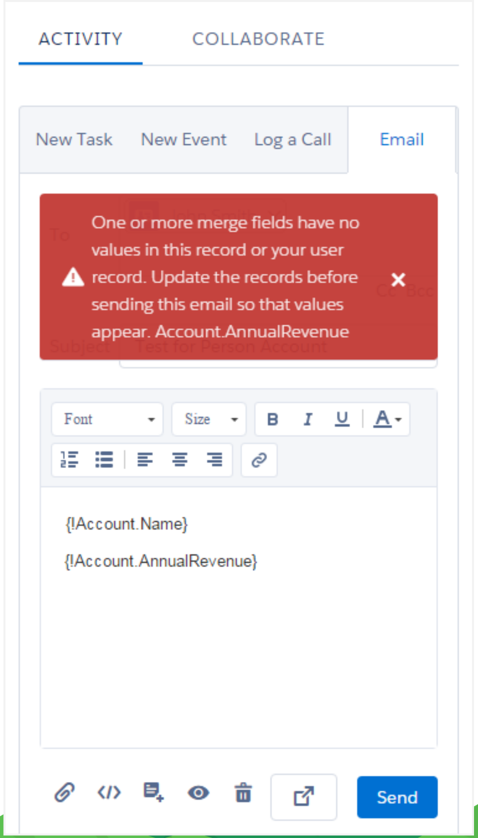
In **Salesforce Classic**, email templates allow fields from multiple entities in a single template. This means that a template-based email can be sent even if the merge record does not contain values for all merge fields

In **Lightning Experience**, template based emails will be blocked from sending if the merge record does not contain values for all merge fields

Limitation & Workaround:

When using a template to compose an email to a person account, the template could include business account merge fields, which would prevent the email from being sent

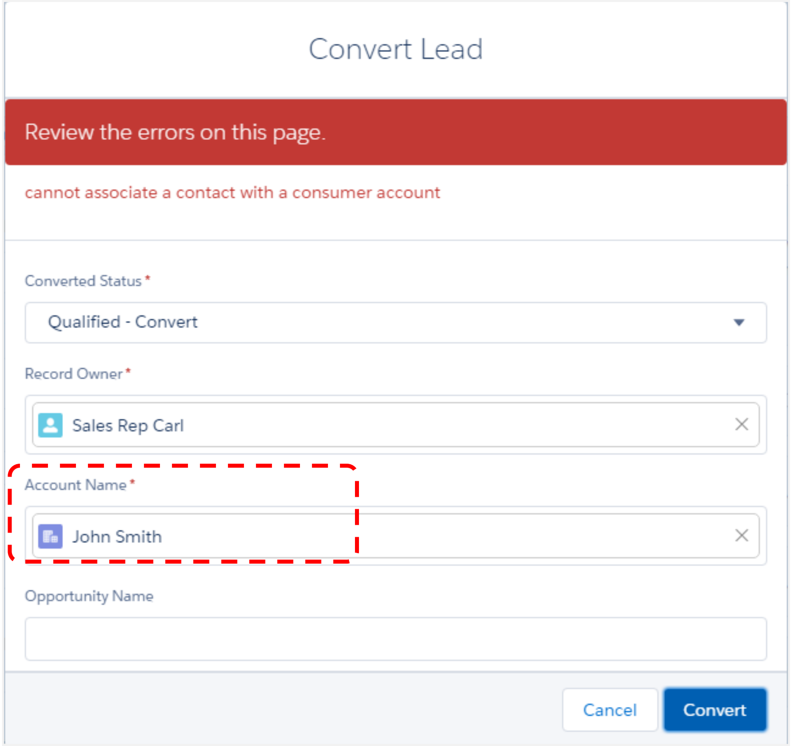
Consider using a unique naming convention to differentiate person account related templates from business account related templates



Limits When Convert Lead to an Existing Person Account

In **Salesforce Classic** , when a user converts a lead where the Company field is populated they can select to convert to an existing person account

In **Lightning Experience** , when a user converts a lead where the Company field is populated they can't convert to a person account (new or existing)



Consideration:

Use case is unlikely, but ensure users are aware of the change in behavior and that the Company field must be blank