



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

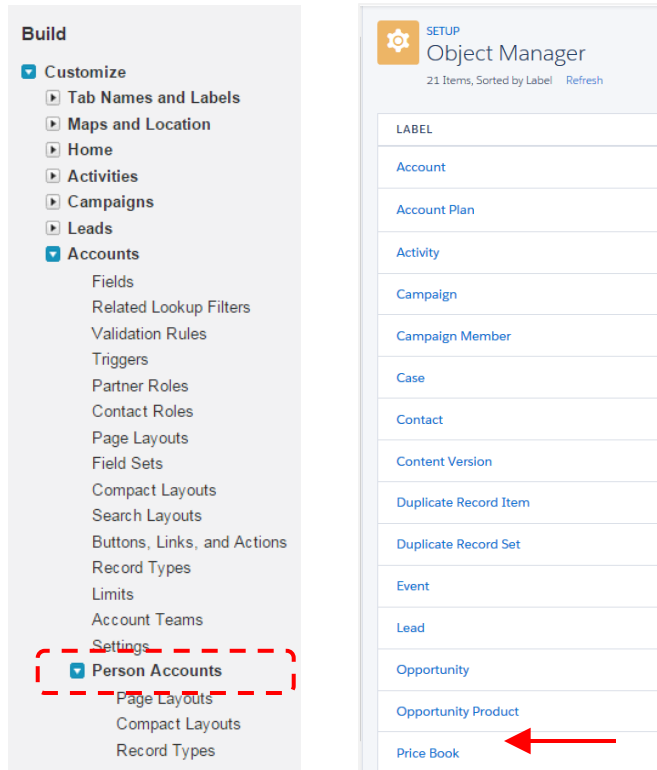
Missing Setup Node in Object Manager

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



The image shows two side-by-side screenshots of the Salesforce Lightning Experience Setup interface. The left screenshot shows the 'Build' menu with the 'Accounts' sub-menu expanded, and 'Person Accounts' highlighted with a red dashed box. The right screenshot shows the 'Object Manager' page with a list of objects. A red arrow points to the 'Price Book' object at the bottom of the list.

Build

- Customize
 - Tab Names and Labels
 - Maps and Location
 - Home
 - Activities
 - Campaigns
 - Leads
 - Accounts
 - Fields
 - Related Lookup Filters
 - Validation Rules
 - Triggers
 - Partner Roles
 - Contact Roles
 - Page Layouts
 - Field Sets
 - Compact Layouts
 - Search Layouts
 - Buttons, Links, and Actions
 - Record Types
 - Limits
 - Account Teams
 - Settings
 - Person Accounts**
 - Page Layouts
 - Compact Layouts
 - Record Types

SETUP Object Manager
21 Items, Sorted by Label Refresh

LABEL
Account
Account Plan
Activity
Campaign
Campaign Member
Case
Contact
Content Version
Duplicate Record Item
Duplicate Record Set
Event
Lead
Opportunity
Opportunity Product
Price Book

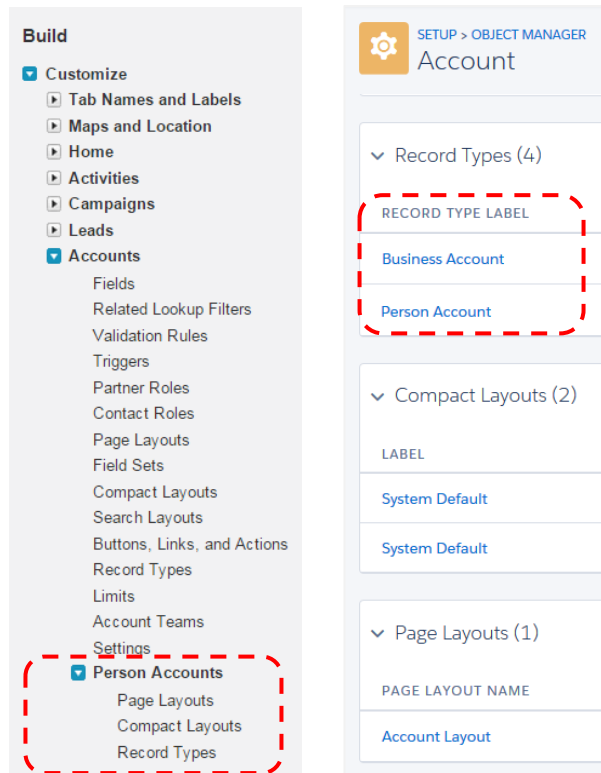
Setup Elements Displayed in Accounts Object Manager

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



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
		<u>Account Name</u>
Edit Replace		Salutation
		First Name
		Last Name
Edit		<u>Account Number</u>
Edit		<u>Account Owner</u>
Edit		<u>Account Record Type</u>
Edit		<u>Account Site</u>
Replace Edit		<u>Account Source</u>
Edit		<u>Annual Revenue</u>
Edit		Assistant
Edit		Asst. Phone
		<u>Billing Address</u>
Edit		Birthdate
		<u>Created By</u>
Edit		<u>Data.com Key</u>
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

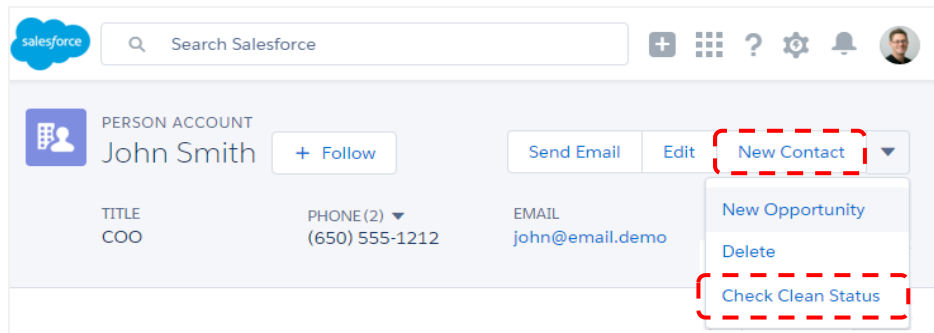
In **Lightning Experience**, Salesforce1 Actions in the Page Layout Editor include default actions that are not valid for person accounts.

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.

Person Account Lightning Page Not Editable

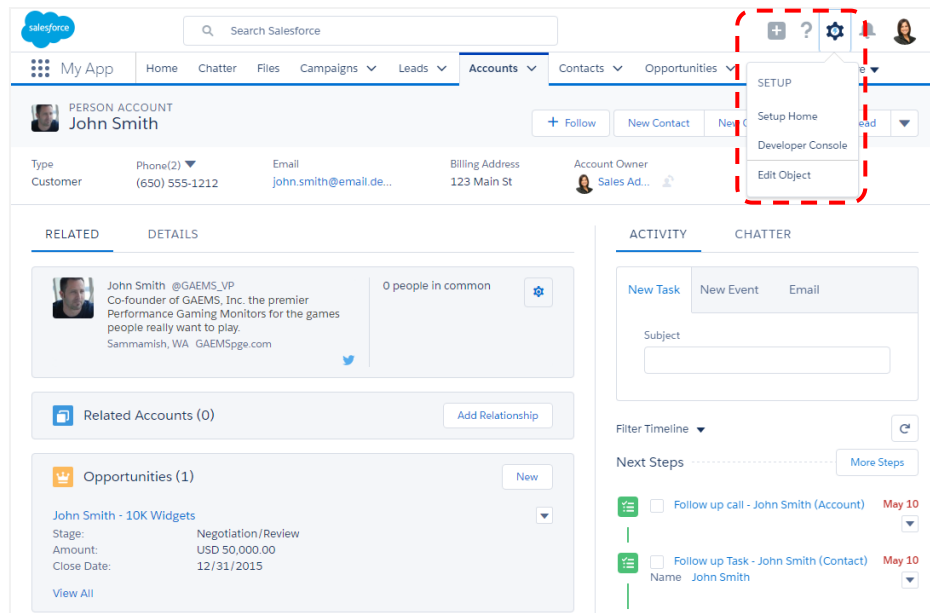
In **Lightning Experience**, administrators previously didn't have the ability to create and edit Lightning Experience record pages for Person Accounts

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

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

The screenshot shows the 'Contact Edit' page for Howard Jones in Salesforce Classic. The 'Account Name' field is highlighted with a red dashed box. A 'Lookup' modal is open, showing a list of 'Recently Viewed Accounts' with a red dashed box around it. A red arrow points to the 'Account Name' field in the 'Edit Howard Jones' modal.

Contact Edit
Howard Jones

Contacts not associated with accounts are private and cannot be viewed by other users or included in reports.

Contact Information

Contact Owner: Cari Aves

First Name: --None-- | Howard

Last Name: Jones

Account Name: [Lookup]

Address Information

Additional Information

Lookup

You can use "*" as a wildcard next to

Recently Viewed Accounts

Account Name

- Acme
- Global Communications
- Global Media
- Universal

Edit Howard Jones

Contact Information

Contact Owner: Cari Aves

Phone: (212) 555-5555

Name: *

Salutation: --None--

First Name: Howard

Last Name (required): Jones

Account Name: *

Account Name List:

- Larry Baxter (650) 555-1234
- John Smith (415) 555-1212
- Global Media (908) 555-1212

Email: info@salesforce.com

Reports To: [Select Contact]

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

Edit John Smith

▲ Review the errors on this page.

Account: bad field names on insert/update call: AccountId, ReportsToId
Account: bad field names on insert/update call: AccountId, ReportsToId

Contact Information

Contact Owner
Cari Aves

Phone
(415) 555-1212

Name *

Salutation
Mr.

First Name
John

Last Name (required) *
Smith

Mobile

Email

Account Name *
John Smith X

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

Create Task

Assigned To * Kevin Cranford X

Type Call

Name |Select--

Status * Not Started

Due Date

Priority *

Related To

Subject *

Comments + New

System Information

DB Days

Name

John

Contacts

1 Result

NAME	ACCOUNT NAME	ACCOUNT SITE	PHONE	EMAIL	CONTACT
John Smith	John Smith		(650) 555-1212	john@email.demo	CAUSE

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

The image displays two screenshots of the Salesforce user interface. The top screenshot is from Salesforce Classic, showing the 'Person Account Detail' for John Smith. It includes a table of 'Open Activities' with columns for Action, Subject, Related To, Name, Due Date, and Assigned To. The bottom screenshot is from Lightning Experience, showing the 'PERSON ACCOUNT John Smith' profile. It features a 'RELATED' section with a table of activities and an 'ACTIVITY' sidebar with a 'New Task' button and a 'Follow up call - John Smith (Account)' activity highlighted with a red dashed box.

Salesforce Classic Interface:

Person Account Detail

Account Name	John Smith	Account Owner	Sales Admin [Change]
Type	Customer	Email	john.smith@email.demo
Birthdate	6/30/1966	Phone	(650) 555-1212

Open Activities

Action	Subject	Related To	Name	Due Date	Assigned To
Edit Cls	Follow up Task - John Smith (Contact)		John Smith	5/10/2016	Sales Admin
Edit Cls	Follow up call - John Smith (Account)	John Smith		5/10/2016	Sales Admin

Lightning Experience Interface:

PERSON ACCOUNT John Smith

Type: Phone(2) (650) 555-1212 | Email: john.smith@email.demo | Billing Address: 123 Main St | Account Owner: Sales Admin

RELATED

NAME	DATE

ACTIVITY

New Task | New Event | Email

Subject: [Text Field]

Show: [Dropdown]

☐ Follow up call - John Smith (Account) Today

Incorrect Quick View for Person Accounts

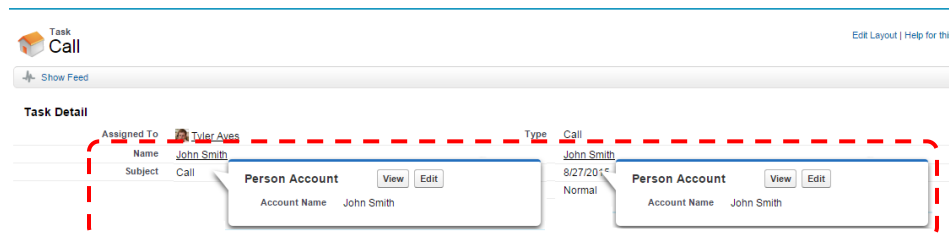
In **Salesforce Classic**, the hover for a person account always displays the Account Preview whether the Person Account is displayed in a “contact” field or an “account” field

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



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

The screenshot displays the Salesforce Lightning Experience interface during email template creation. On the left, the 'Select Merge Field' dialog is open, showing a list of available fields. A red arrow points to the 'Account : Account Address' field. The list includes fields such as 'Account : % Goal Attainment', 'Account : % of Reps Trained', 'Account : Account Address', 'Account : Account Custom Field', 'Account : Account Description', 'Account : Account Fax', 'Account : Account ID', 'Account : Account Location', 'Account : Account Name', 'Account : Account Number', and 'Account : Account Phone'. On the right, the email template editor is visible, showing the 'To' field with 'John Smith' and the 'Subject' field. Below the editor, a 'Preview Email' section shows the rendered email content, including the name 'John Smith' and the birthdate '6/30/1966', both highlighted with red dashed boxes. The interface also includes a 'Close' button at the bottom right.

Email To Field Not Auto Populated for Person Accounts

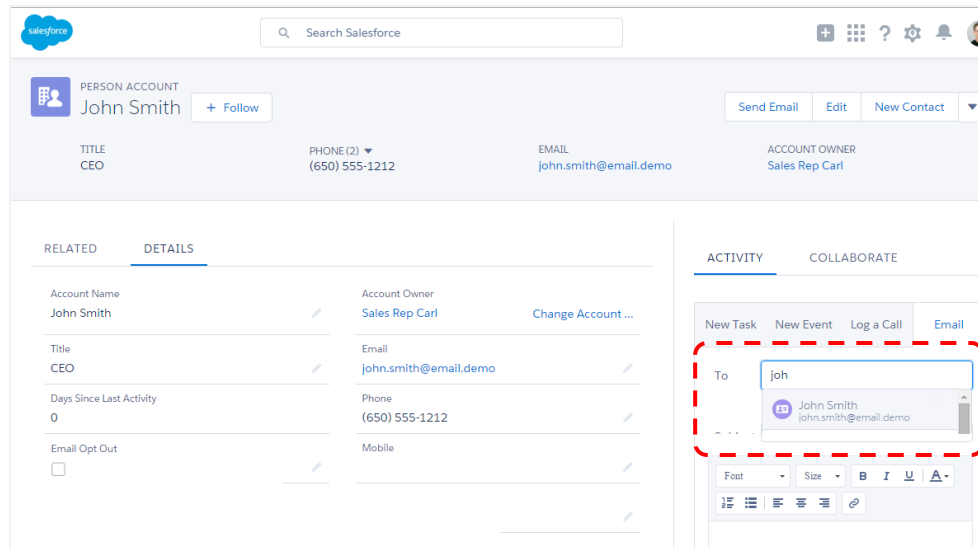
In **Salesforce Classic**, when creating an email from a person account record, the To field auto-populates with the person account

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



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

Person Account Detail

Account Name: John Smith | Account Owner: Sales Admin [Change]
 Title: CEO & President | Email: john.smith@email.demo
 Department: | Phone: (650) 555-1212

Cases

Action	Case	Contact Name	Account Name	Subject	Priority	Date Opened	Status	Owner
Edit Cls	00001629	John Smith	DOT Green Media	-	Medium	12/22/2015	New	Sales Admin
Edit Cls	00001630	John Smith	John Smith	-	Medium	12/22/2015	New	Sales Admin

PERSON ACCOUNT John Smith

Type: Customer | Phone: (650) 555-1212 | Email: john.smith@email.de... | Billing Address: 123 Main St | Account Owner: Sales Ad...

RELATED

Cases (1)

00001630
 Contact Name: John Smith
 Account Name: John Smith
 Subject: [Empty]



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** .

The screenshot displays the Salesforce interface for a Person Account record for John Smith. The 'Notes' section is highlighted with a red dashed box, showing two notes:

Action	Title	Last Modified	Created By	Text Preview
Edit Del	Note for John Smith from Record Home	11/8/2016 5:49 PM	Sales Admin	This note was created from the Notes related list on the John Smith record home page
Edit Del	Note for John Smith as an Account	11/8/2016 5:48 PM	Sales Admin	This note was created from the Notes Home page for John Smith as an Account

The 'Related' section is also highlighted with a red dashed box, showing the same two notes:

- Note for John Smith from Record Home
11/8/2016 5:49 PM by Sales Admin
This note was created from the Notes related list on the John Smith record home page
- Note for John Smith as an Account
11/8/2016 5:48 PM by Sales Admin
This note was created from the Notes Home page for John Smith as an Account

The 'Activity' section is visible on the right, showing options for New Task, New Event, and Email.

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

The image shows a sequence of three screenshots from the Salesforce Lightning Experience interface, illustrating a limitation when creating a person account from a contact's lookup field.

- Top Screenshot:** A contact record for "Ms. Rosa Aaron" is shown. The "Account Name" lookup field is highlighted in yellow. The dropdown menu is open, showing options: "Salesforce", "Amazon", "Robert Janzen La Jolla", and "+ New Account". The "+ New Account" option is highlighted with a red dashed box.
- Middle Screenshot:** The "New Account" modal is displayed. It prompts the user to "Select a record type" with three radio buttons: "Simple", "Advanced", and "Person Account". The "Person Account" option is selected, indicated by a blue dot and a red arrow.
- Bottom Screenshot:** The "New Account" modal is shown again, but with an error. The "Account Name" field now contains "John Smith" and is highlighted in yellow. A red dashed box surrounds the field, and a red error message at the bottom states: "Can not select 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

Case Edit
New Case

Case Edit [Save] [Save & Close] [Save & New] [Check Spelling] [Cancel]

Case Information [Required Information]

Case Owner Sales Rep

Contact Name John Smith

Account Name John Smith

Status New

Priority Medium

Case Origin Phone

Create Case

Case Information

Case Owner Sales Rep Carl

Indicator ★

Case Number

Status * New

Contact Name John Smith

Priority Medium

Account Name Select Account

Case Origin Phone

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

The image displays two screenshots of the Salesforce Lightning Experience interface, illustrating inconsistencies in icon display for person accounts.

Top Screenshot: Shows the 'Edit John Smith - 10K Widgets' page. The 'Account Name' field displays 'John Smith' with a person icon. The field is highlighted with a red dashed box.

Bottom Screenshot: Shows the same 'Edit John Smith - 10K Widgets' page. The 'Account Name' field displays 'Select Account' with a building icon. The field is highlighted with a red dashed box.

Both screenshots show the following fields:

- Opportunity Name: John Smith - 10K Widgets
- Amount: \$50,000.00
- Opportunity Owner: Sales Rep Carl
- Close Date: 12/31/2015
- Stage: Negotiation/Review

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

Search Results

John Search Again Options...

Accounts (1)

Action	Account Name	Phone
Edit	John Smith	(415) 555-1212

salesforce John Smith

TOP RESULTS FEEDS LEADS ACCOUNTS CONTACTS MORE ▾

Accounts

1 Result

ACCOUNT NAME	ACCOUNT SITE	PHONE	ACCOUNT OWNER ALIAS
John Smith		(650) 555-1212	CAves ▾

Contacts

1 Result

NAME	ACCOUNT NAME	IS PERSON ACCOUNT	PHONE
John Smith	John Smith	<input checked="" type="checkbox"/>	(650) 555-1212 ▾

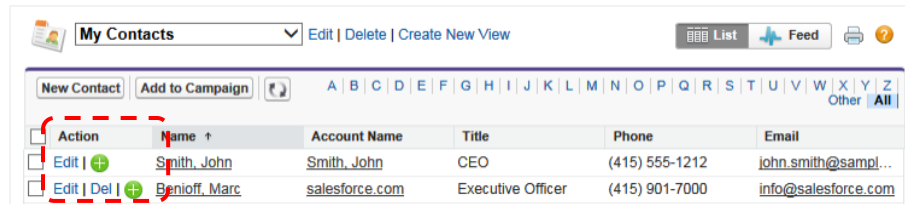
* This is a change in behavior from Salesforce Classic



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

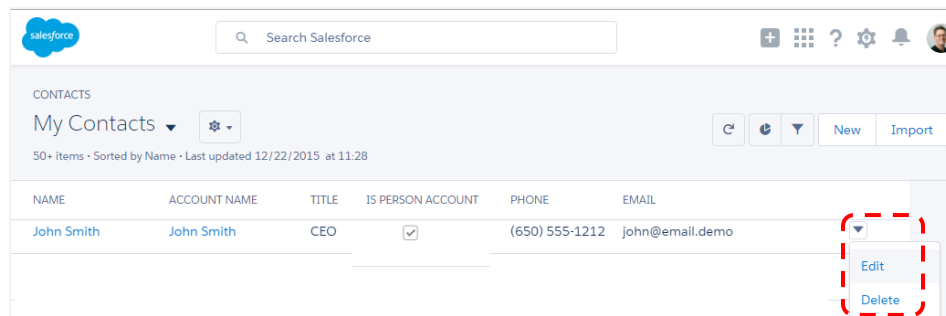


The screenshot shows the 'My Contacts' view in Salesforce Classic. A red dashed box highlights the 'Action' column for two contacts. The first contact, 'Smith, John', has an 'Edit' button with a green plus icon. The second contact, 'Benioff, Marc', has an 'Edit | Del' button with a green plus icon, indicating that both Edit and Delete actions are available for person accounts in this version.

Action	Name ↑	Account Name	Title	Phone	Email
Edit +	Smith, John	Smith, John	CEO	(415) 555-1212	john.smith@saml...
Edit Del +	Benioff, Marc	salesforce.com	Executive Officer	(415) 901-7000	info@salesforce.com

✓ Consideration:

Ensure users are aware of the change in behavior



The screenshot shows the 'My Contacts' view in Salesforce Lightning Experience. A red dashed box highlights the action menu for a contact. The menu contains both 'Edit' and 'Delete' buttons, indicating that both actions are available for person accounts in this version.

NAME	ACCOUNT NAME	TITLE	IS PERSON ACCOUNT	PHONE	EMAIL
John Smith	John Smith	CEO	<input checked="" type="checkbox"/>	(650) 555-1212	john@email.demo

* This is a change in behavior from Salesforce Classic

Email Blocked if Contains Business Account Merge Fields

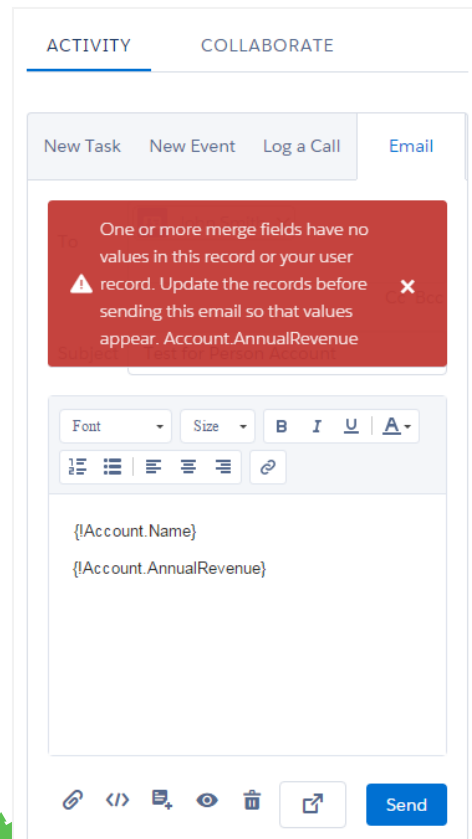
In **Salesforce Classic**, email templates allow fields from multiple entities in a single template. This means that a template-based email can be sent even if the merge record does not contain values for all merge fields

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



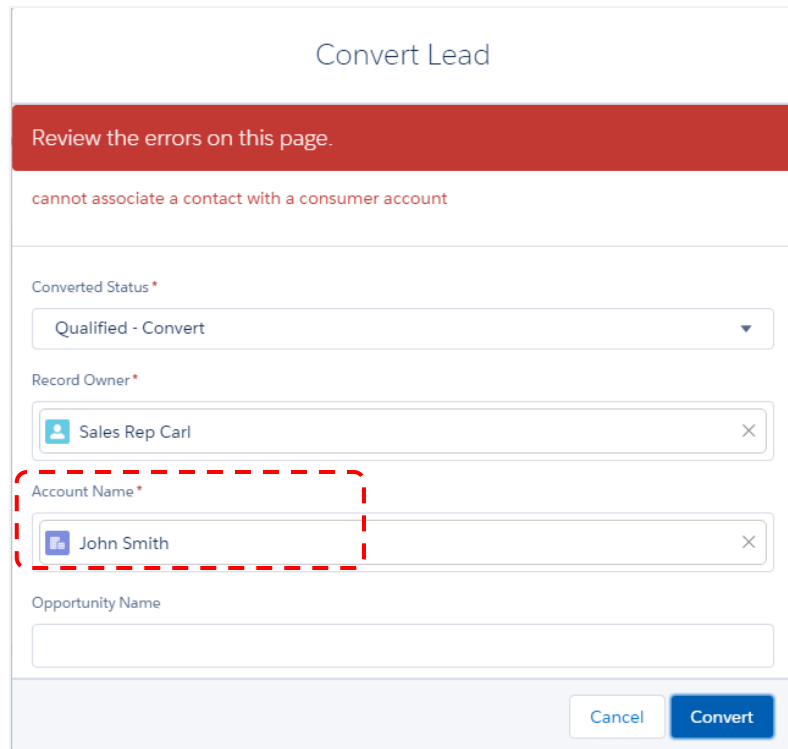
Limits When Convert Lead to an Existing Person Account

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



The screenshot shows the 'Convert Lead' dialog box. At the top, there is a red banner with the text 'Review the errors on this page.' Below this, a red error message states 'cannot associate a contact with a consumer account'. The form contains several fields: 'Converted Status' (a dropdown menu set to 'Qualified - Convert'), 'Record Owner' (a dropdown menu set to 'Sales Rep Carl'), 'Account Name' (a dropdown menu set to 'John Smith', which is highlighted with a red dashed box), and 'Opportunity Name' (an empty text field). At the bottom right, there are 'Cancel' and 'Convert' buttons.