

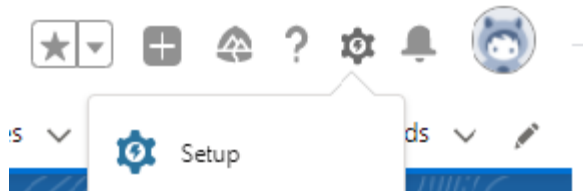
Person Accounts Converter: Configuration Guide

When you install the Package from the AppExchange all of the features and functionality will be enabled for you.

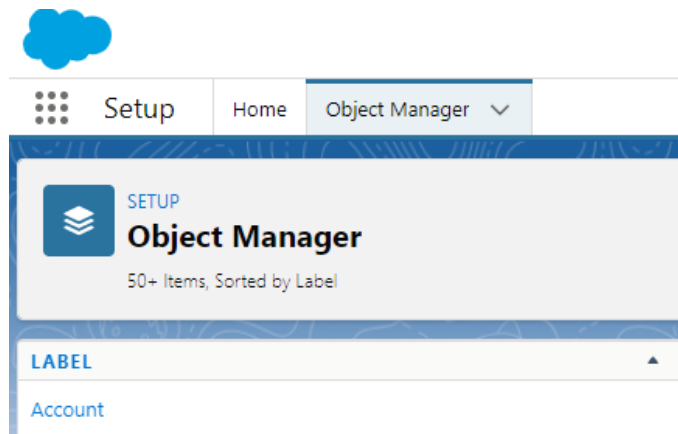
To expose this solution to your users you will need to complete the following;

Add Convert Record Type Button to Account Page Layout(s)

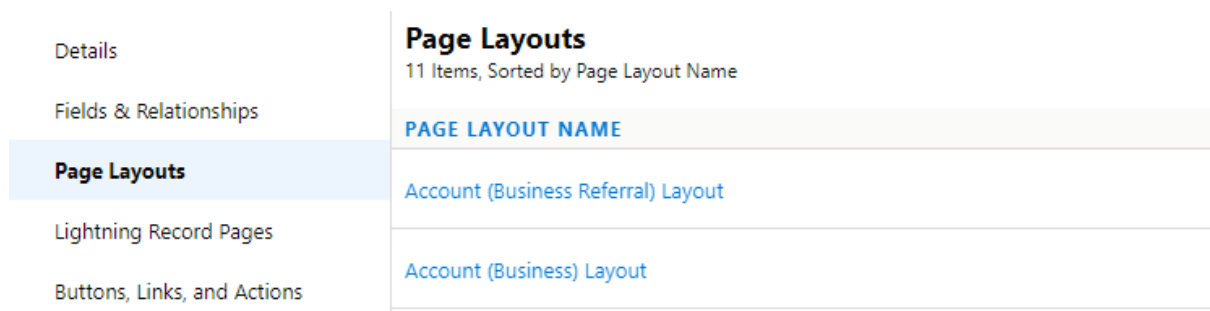
Press on the Settings Cog and then press on Setup



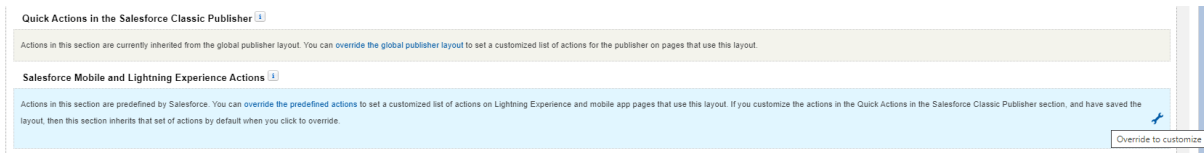
Press on Object Manager and then Account



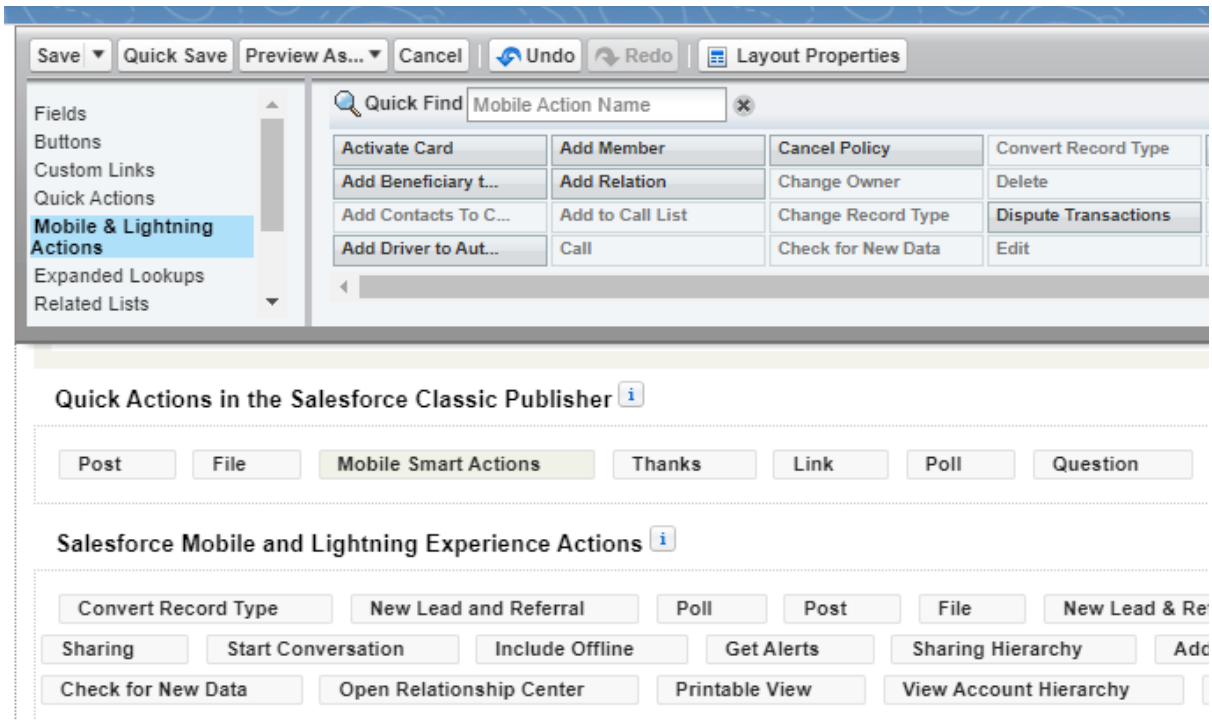
Press on Page Layouts and then press on the Page Layout Name for which you want to add the button



From within the Page Layout Editor press *Override the Predefined Actions* under *Salesforce Mobile and Lightning Experience Actions*



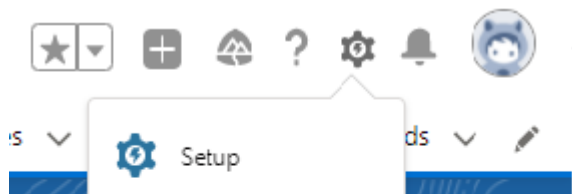
Drag and Drop the *Convert Record Type* from the Mobile & Lightning Actions Pallet into the desired position under Salesforce Mobile and Lightning Experience Actions



Save the Page Layout and repeat for any additional layouts for which you want to add the button.

Add Convert Record Type Button to Person Account Page Layout(s)

Press on the Settings Cog and then press on Setup



Press on Object Manager and then Person Account

 SETUP Object Manager 9 Items, Sorted by Label		
LABEL	API NAME	TYPE
Asset Downtime Period	AssetDowntimePeriod	Standard Object
Asset State Period	AssetStatePeriod	Standard Object
Customer Property	CustomerProperty	Standard Object
Loan Application Property	LoanApplicationProperty	Standard Object
Operating Hours	OperatingHours	Standard Object
Person Account	PersonAccount	Standard Object

Press on Page Layouts and then press on the Page Layout Name for which you want to add the button.



Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Person Account

Details

Page Layouts

Compact Layouts

Record Types

Page Layouts

1 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME

Person Account Layout

From within the Page Layout Editor press *Override the Predefined Actions* under *Salesforce Mobile and Lightning Experience Actions*

Quick Actions in the Salesforce Classic Publisher

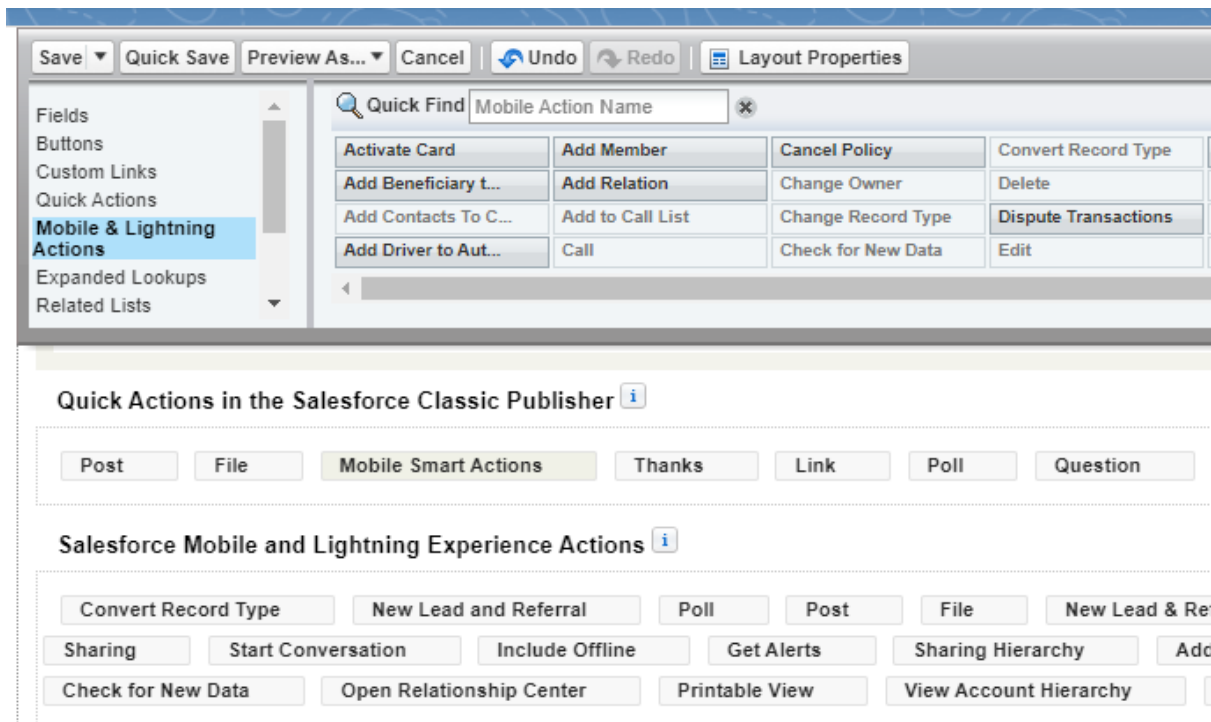
Actions in this section are currently inherited from the global publisher layout. You can [override the global publisher layout](#) to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Override to customize

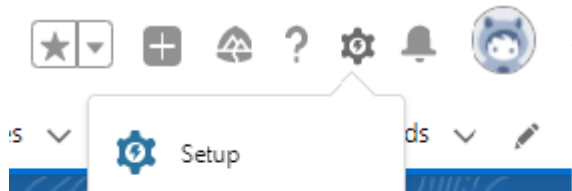
Drag and Drop the *Convert Record Type* from the Mobile & Lightning Actions Pallet into the desired position under Salesforce Mobile and Lightning Experience Actions



Save the Page Layout and repeat for any additional layouts for which you want to add the button.

Add Convert Record Type Button to Contact Page Layout(s)

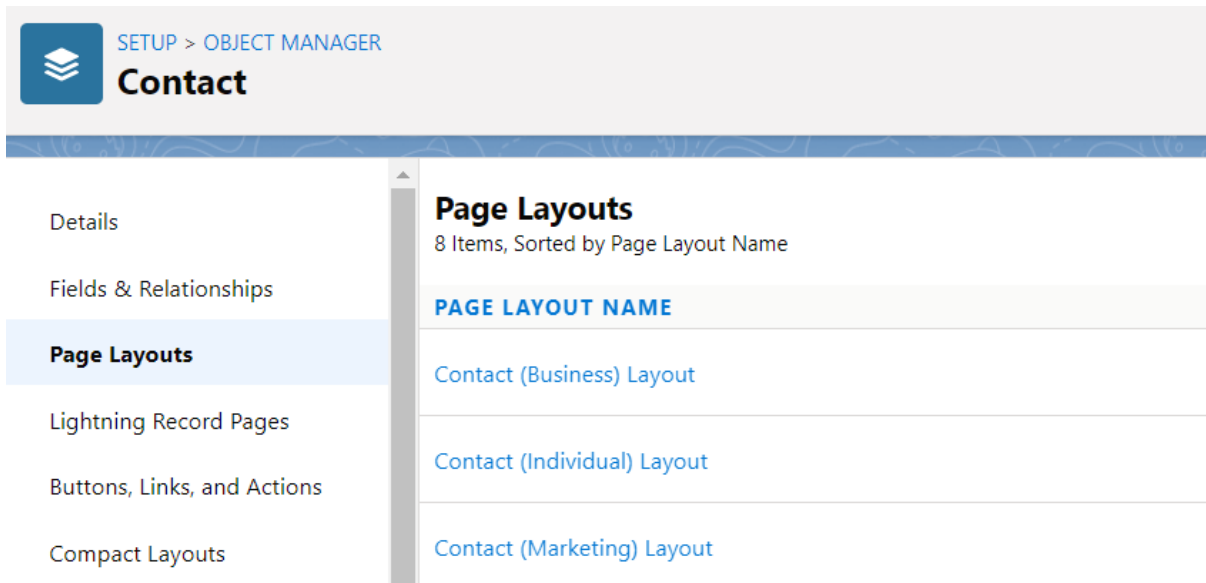
Press on the Settings Cog and then press on Setup



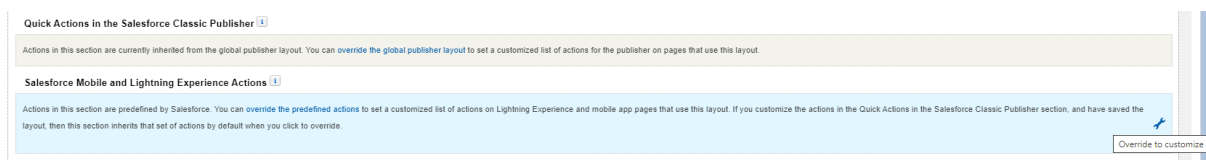
Press on Object Manager and then Contact

Object Manager		
10 Items, Sorted by Label		
LABEL	API NAME	TYPE
Account Contact Relationship	AccountContactRelation	Standard Object
Contact	Contact	Standard Object

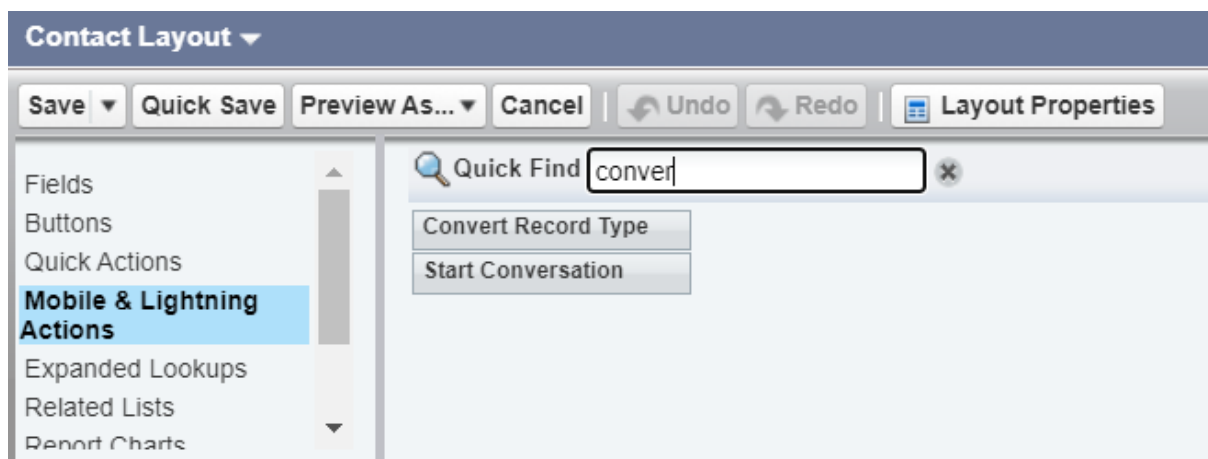
Press on Page Layouts and then press on the Page Layout Name for which you want to add the button



From within the Page Layout Editor press *Override the Predefined Actions* under *Salesforce Mobile and Lightning Experience Actions*



Drag and Drop the *Convert Record Type* from the Mobile & Lightning Actions Pallet into the desired position under Salesforce Mobile and Lightning Experience Actions

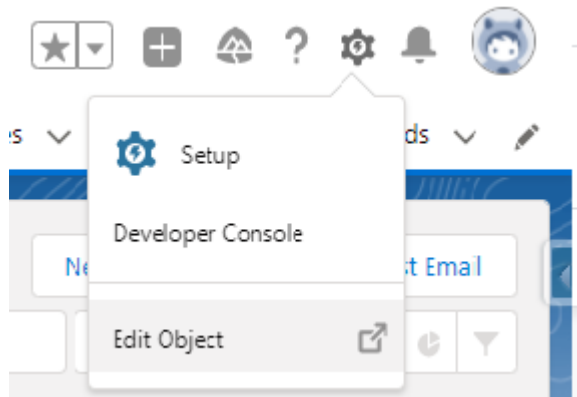


Save the Page Layout and repeat for any additional layouts for which you want to add the button

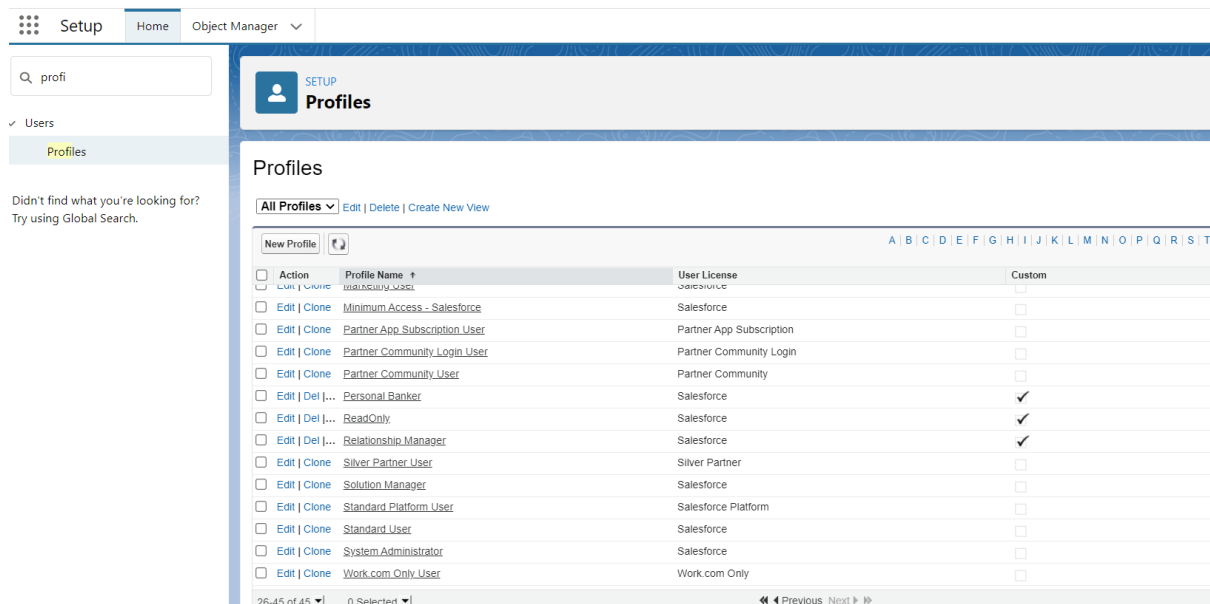
Grant Access to Lightning Page/ Tab for Convert Record Type

When you convert an account into a new record type, it is important to verify that the user profile has got the correct Lightning Record Page access.

Press on the Settings Cog and then press on Setup



Select Profiles from the side bar and select the necessary profile.



Under Custom Tab settings edit the Convert Record Type tab to “Default On”. (nb: View will be different if you’ve enabled “Enhanced Profile User Interface”, this should instead appear under Object Settings)

Setup Home Object Manager

Q profil

Users

Profiles

Didn't find what you're looking for?
Try using Global Search.

SETUP Profiles

Feature	Status
Healthcare Provider Taxonomies	Default On
Ideas	Default On
Idea Themes	Default On
Identity Documents	Default On
Images	Default On
Individuals	Default On
Info Authorization Request	Default On

Custom Tab Settings

Feature	Status
Alerts	Default On
Assets and Liabilities	Default On
Charges And Fees	Default On
Clients	Tab Hidden
Convert Record Type	Default On
Education	Default On
Employment	Default On
Financial Accounts	Default On

Record Type Settings

Standard Record Type Settings

Feature	Status
Access	
Accounts	Person Account (Default), Business, Business Account, Household, Institution [Edit]
Action Plans	
Action Plan Items	
Action Plan Item Dependencies	

Repeat for any additional profiles you wish to edit.

Other Points to Note

- As this uses Lightning Flow your org needs to be running in Lightning and have this enabled
- The flow will run as the Current User so the Running User will need to have the necessary permissions to change the Record Type. This means against the following objects they need at least the below access
 - Account; Read, Create, Edit
 - Contact; Read, Create, Edit
- The Running User will need to access to Flow via their Profile/Permission Set
- Although the package may function correctly without "Flow User" checked it's always best practice to make sure each Running User has Flow User checked on their User Record
- If you wish to uninstall the package you will need to deactivate the Flow prior to uninstall for this process to be successful