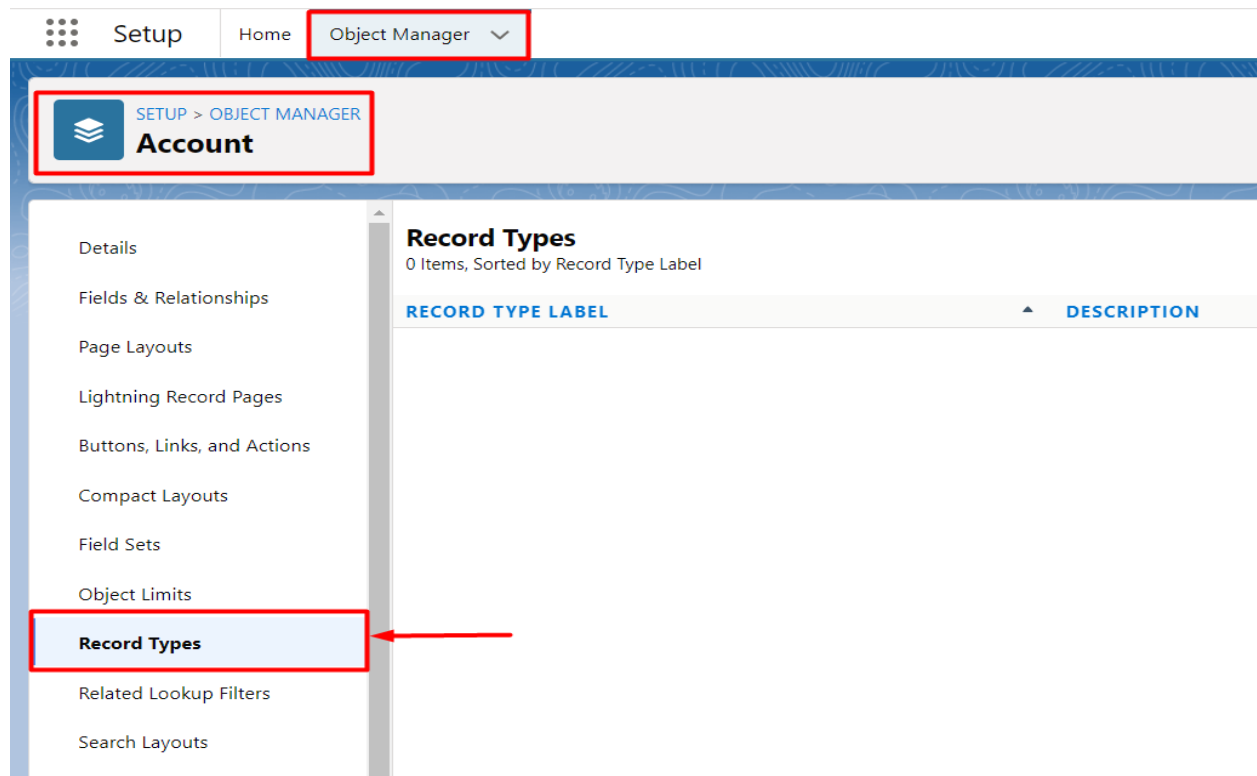


Step 1: The first step is to go to object manager, open the account object and select the option record type available on the left-hand side and click on new.



Step 2: Once you click on new on the next page you will see the step first which is enter details. Here you will have to enter details like record type, label name, etc.

Step 1. Enter the details

Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you can assign it to existing records. To make the new record type available to users, select the 'Make Available' checkbox for the user profiles.

Record Type

Existing Record Type: --Master-- ▼

Record Type Label:

Record Type Name: ⓘ

Description:

Active: ☒

Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type available to users assigned to this record type can still view and edit records associated with record types not available for their profiles.

Profile Name	Record Types Currently Available	<input checked="" type="checkbox"/> Make Available
Analytics Cloud Integration User		<input checked="" type="checkbox"/>
Analytics Cloud Security User		<input checked="" type="checkbox"/>
Authenticated Website		<input checked="" type="checkbox"/>
Authenticated Website		<input checked="" type="checkbox"/>
bgbg		<input checked="" type="checkbox"/>

Step 5: Repeating the similar process and putting the label as business account. API name will be generated automatically then selecting make available and clicking on next .

Record Type

Existing Record Type: --Master--

Record Type Label: Business Account

Record Type Name: Business_Account

Description:

Active: ☒

Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the Users assigned to this record type can still view and edit records associated with record types not available for their profiles.

Profile Name	Record Types Currently Available	<input checked="" type="checkbox"/> Make Available
Analytics Cloud Integration User	Individual Account (Default)	<input checked="" type="checkbox"/>
Analytics Cloud Security User	Individual Account (Default)	<input checked="" type="checkbox"/>
Authenticated Website	Individual Account (Default)	<input checked="" type="checkbox"/>
Authenticated Website	Individual Account (Default)	<input checked="" type="checkbox"/>
bgbb	Individual Account (Default)	<input checked="" type="checkbox"/>
Chatter External User	Individual Account (Default)	<input checked="" type="checkbox"/>
Chatter Free User	Individual Account (Default)	<input checked="" type="checkbox"/>

Step 6: Next step is to assign page layout. Here I am selecting Business account page layout and clicking on save.

Step 2. Assign page layouts

Account Record Type: Business Account
Record Type Name: Business_Account
Description:

Select the page layout that users with this profile see for records with this record type. After saving, choose the picklist values that are available with this record type.

☒ Apply one layout to all profiles
☐ Apply a different layout for each profile

Profile:

Profile	Page Layout
Analytics Cloud Integration User	Business account layout
Analytics Cloud Security User	Business account layout
Authenticated Website	Business account layout
Authenticated Website	Business account layout
bgbb	Business account layout
Chatter External User	Business account layout
Chatter Free User	Business account layout
Chatter Moderator User	Business account layout

Business account layout (selected)

- Select Page Layout --
- Account (Marketing) Layout
- Account (Sales) Layout
- Account (Support) Layout
- Account Layout
- Business account layout**
- Individual account layout

Step 7: Now if we move to record type you will be able to see there are two types of record available.

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Search Layouts for Salesforce Classic

Hierarchy Columns

Record Types

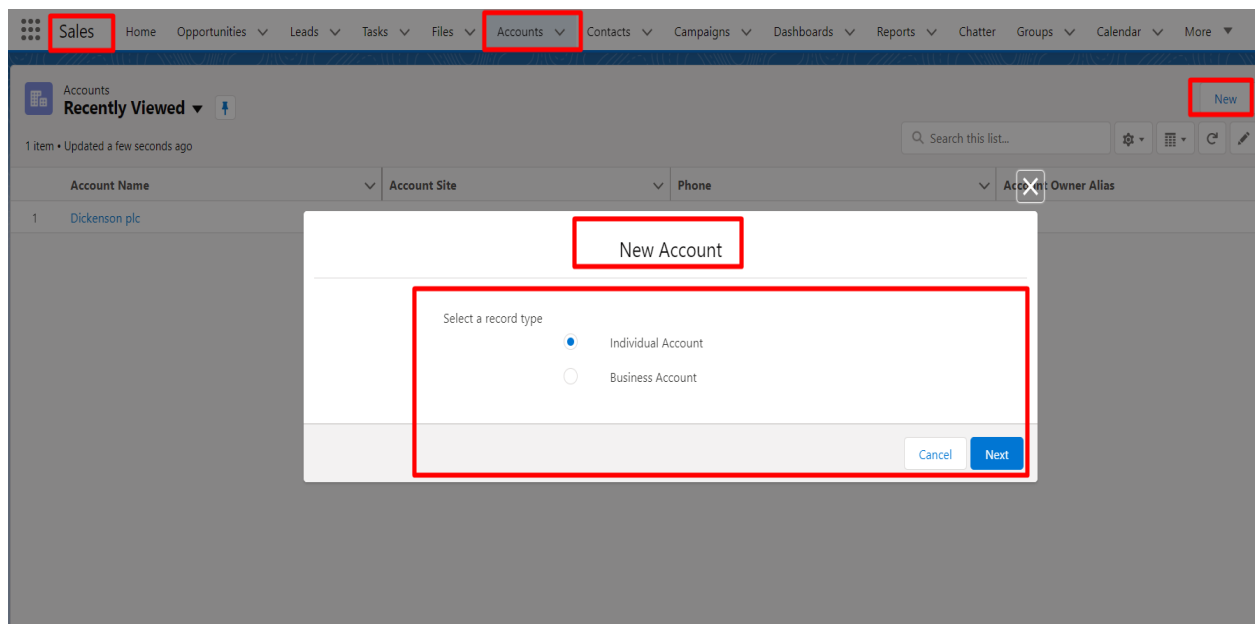
2 Items, Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION	ACTIVE
Business Account		✓
Individual Account		✓

Step 8: Now clicking on page layout assignment. When you click on it on the next page you will see that business account record type is associated with business account page layout and individual account record type is associated with individual account page layout.

Profiles	Record Types			(1)
	Master	Business Account	Individual Account	
Analytics Cloud Integration User	Account Layout	Business account layout	Individual account layout	
Analytics Cloud Security User	Account Layout	Business account layout	Individual account layout	
Authenticated Website	Account Layout	Business account layout	Individual account layout	
Authenticated Website	Account Layout	Business account layout	Individual account layout	
bgbb	Account Layout	Business account layout	Individual account layout	
Chatter External User	Account Layout	Business account layout	Individual account layout	
Chatter Free User	Account Layout	Business account layout	Individual account layout	
Chatter Moderator User	Account Layout	Business account layout	Individual account layout	
Contract Manager	Account Layout	Business account layout	Individual account layout	
Cross Org Data Proxy User	Account Layout	Business account layout	Individual account layout	
Custom: Marketing Profile	Account (Marketing) Layout	Business account layout	Individual account layout	
Custom: Sales Profile	Account (Sales) Layout	Business account layout	Individual account layout	
Custom: Support Profile	Account (Support) Layout	Business account layout	Individual account layout	
Customer Community Login User	Account Layout	Business account layout	Individual account layout	
Customer Community Plus Login User	Account Layout	Business account layout	Individual account layout	
Customer Community Plus User	Account Layout	Business account layout	Individual account layout	
Customer Community User	Account Layout	Business account layout	Individual account layout	
Customer Portal Manager Custom	Account Layout	Business account layout	Individual account layout	
Customer Portal Manager Standard	Account Layout	Business account layout	Individual account layout	
External Apps Login User	Account Layout	Business account layout	Individual account layout	
External Identity User	Account Layout	Business account layout	Individual account layout	
Force.com - App Subscription User	Account Layout	Business account layout	Individual account layout	
Force.com - Free User	Account Layout	Business account layout	Individual account layout	
Gold Partner User	Account Layout	Business account layout	Individual account layout	
High Volume Customer Portal	Account Layout	Business account layout	Individual account layout	

Step 9: Moving to sales and opening account tab clicking on new you will now be asking to select a type of record either business record or individual record.



Step 10: Here I am selecting an individual account and clicking on next so then you will be able to see that you have to fill in a little information.

A screenshot of the 'Account Information' form in Salesforce. The form is divided into two columns. The left column contains fields for 'Account Owner' (astha gupta), '* Account Name' (empty), 'Parent Account' (Search Accounts...), 'Account Number' (empty), 'Account Site' (empty), 'Type' (--None--), 'Industry' (--None--), and 'Annual Revenue'. The right column contains fields for '* Rating' (--None--), 'Phone' (empty), 'Fax' (empty), 'Website' (empty), 'Ticker Symbol' (empty), 'Ownership' (--None--), and 'Employees' (empty). A red error message 'Complete this field.' is visible below the '* Rating' dropdown menu.

Step 11: Now if we select business account and click on next we will see a different set of information available. Here I am putting all the required information and clicking on save.

This screenshot shows a form for creating a business account. The form is titled "Account Owner" with the name "astha gupta". The "Account Name" field is highlighted in yellow and contains "Buss Acc". The "Rating" dropdown is highlighted in yellow and set to "Hot". The "Annual Revenue" field is highlighted in yellow and contains "80000". The "Employees" field is highlighted in yellow and contains "120". The "Save" button is highlighted in red. The form also includes fields for "Parent Account", "Account Number", "Account Site", "Type", "Industry", "Phone", "Fax", "Website", "Ticker Symbol", and "Ownership".

Step 12: Similarly create an individual account and when we save we can see that there are a lot of fields available as compared to the business record that we just created.

This screenshot shows a form for creating an individual account. The form is titled "Account Name" with the name "Indv Acc". The "Employees" field is highlighted in yellow and contains "120". The "Annual Revenue" field is highlighted in yellow and contains "9000". The "Save" button is highlighted in red. The form also includes fields for "Parent Account", "Account Number", "Account Site", "Type", "Industry", "Phone", "Fax", "Website", "Ticker Symbol", and "Ownership".