

End User Training Guide

Bopsy Account Hierarchy

Introduction

The Bopsy Account Hierarchy package is a powerful tool designed to streamline the management of account hierarchies within Salesforce. It enables automatic population of ultimate parent accounts and facilitates data rollups through custom metadata settings. By leveraging this package, organizations can efficiently organize and report on their account data, enhancing visibility and decision-making capabilities.

Account hierarchies are essential in Salesforce as they represent the relationships between accounts, allowing for better organization and analysis of data. However, managing these hierarchies can be complex, especially in large organizations with intricate account structures. The Bopsy Account Hierarchy package aims to simplify this process by providing a range of features and tools tailored to account hierarchy management.

Overview of Key Components

Before diving into the setup and configuration, let's explore the key components included in the Bopsy Account Hierarchy package

Documents:

- Bopsy Account Hierarchy (Folder)
- Bopsy_Account_Hierarchy_Logo

Apex Classes:

- UltimateParentPopulateTest
- bopsyAccountHierarchyBatch
- UltimateParentPopulateQ
- UltimateParentPopulateAccounts
- AccountHierarchyTest
- BatchUltimateParentPopulateAccounts
- BatchUltimateParentPopulateAccountsTest
- AccountHierarchyTrigTest

Lightning Web Component Bundles:

- bopsyAccountHierarchySetup

Lightning Pages:

- Bopsy_Account_Hierarchy_UtilityBar
- Account_Hierarchy_Setup

Custom Fields:

- Populate Rollup on Children
- Total Child Locations
- Ultimate Parent
- Type
- Rollup Field API Name
- Field API Name
- Active
- Hierarchy Level
- Hierarchy Adjusted

Layout:

- Account Hierarchy Rollup Layout
- Bopsy Account Hierarchy

Objects:

- Account Hierarchy Rollup (Component Type: Custom Metadata Type)
- Bopsy Account Hierarchy Config (Component Type: Custom Object)

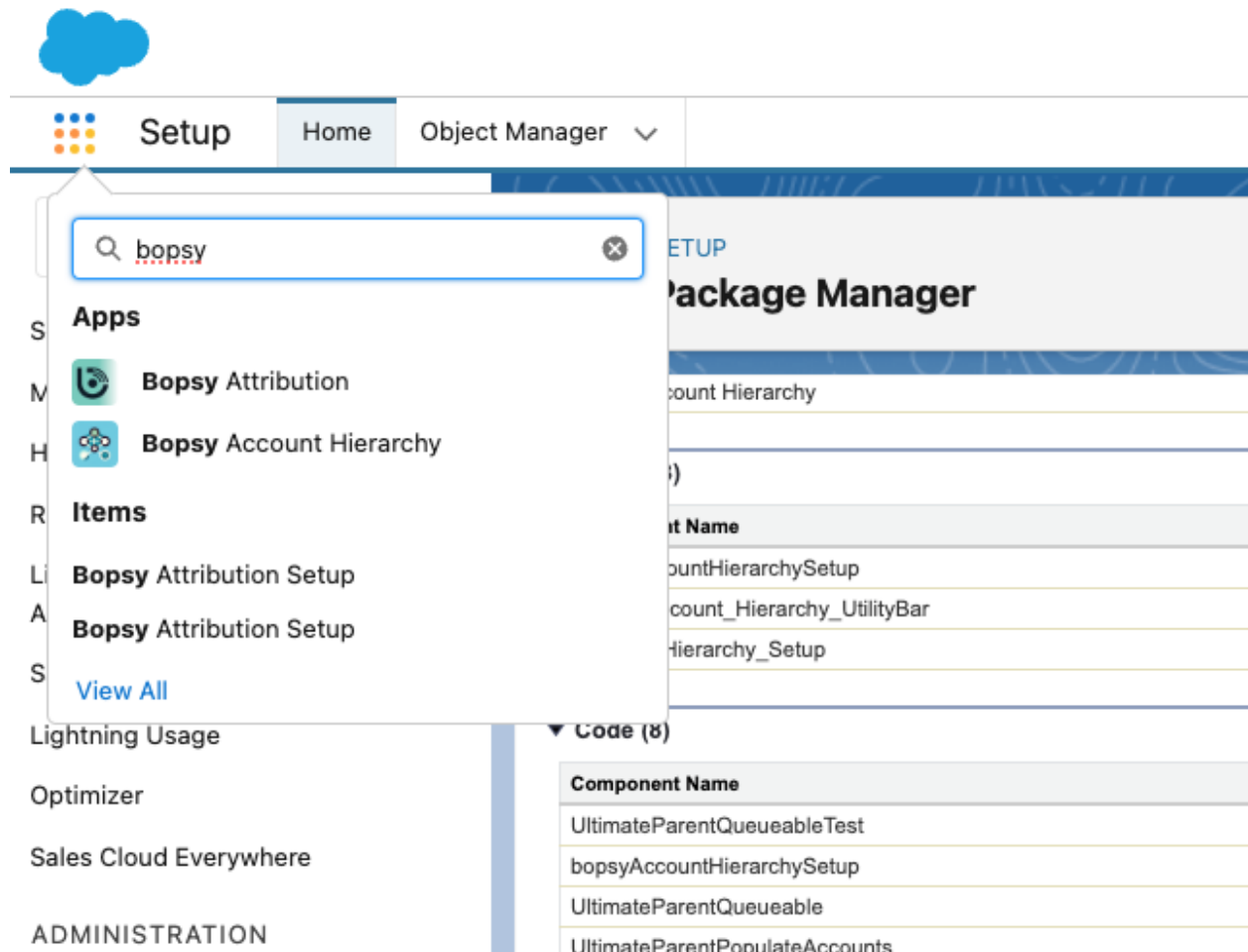
Tabs:

- Account Hierarchy Setup (Component Type: Tab)

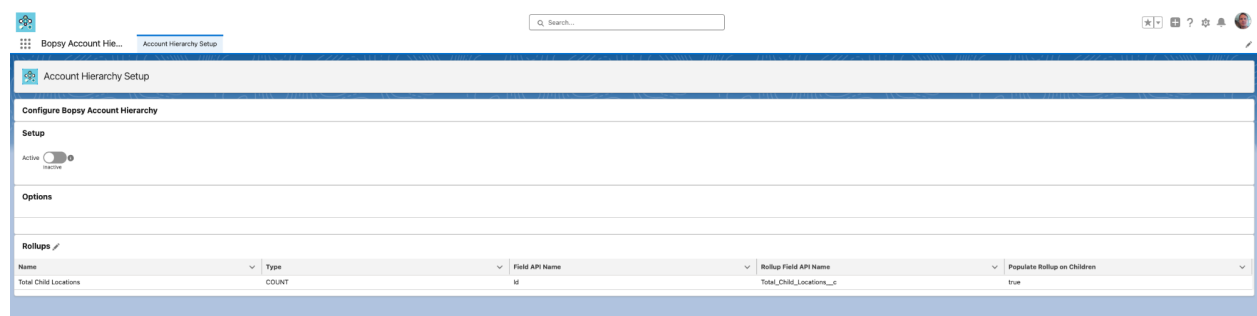
Setting Up Your Account Hierarchy

1. Accessing the Configuration Page

Navigate to the Bopsy Account Hierarchy app. This will automatically take you to the setup page.



Here, you will see a table overview of the custom metadata rollup records.



2. Enabling or Disabling Functionality

Use the toggle switch available on the setup page to turn the hierarchy functionality on or off.

Setup



Setup



Changes are immediately applied and affect how account data is processed in the hierarchy. Remember, you can still setup a batch process or add other automation to call this functionality. It will only switch off the package's trigger.

3. Configuring Rollup Settings

Each rollup setting is defined in the Account Hierarchy Rollup custom metadata type. To add or modify rollup definitions, use the edit pencil icon next to the rollups header. This will take you to the custom metadata types url.

Options

Rollups

Name
Total Child Locations

Edit

You'll then want to click the "Manage Records" link for the "Bopsy Account Hierarchy Rollups" custom metadata type



SETUP

Custom Metadata Types

All Custom Metadata Types

Custom metadata types enable you to create your own setup objects whose records are

Rather than building apps from data records in custom objects or custom settings, you

Action	Label	Installed Package
Del Manage Records	Account Hierarchy Rollup	

To add or modify rollup definitions, use the configuration interface on this page.

Account Page Setup

To setup the account page, we recommend adding a section called account hierarchy. And adding the following fields to that section:

- Ultimate Parent
- Hierarchy Level
- Any rollup fields created for rollup purposes

Troubleshooting and Support

- If you encounter any issues while using the Bopsy Account Hierarchy managed package, please contact your Salesforce administrator or refer to the detailed documentation provided in the Bopsy Account Hierarchy document folder.
- Common issues and their resolutions:
 - **Slow performance when updating large account hierarchies:** Adjust the batch size for batch processes to optimize performance.
 - **Incorrect rollup calculations:** Double-check the rollup settings in the Account Hierarchy Rollup custom metadata type for any errors or inconsistencies.

Appendix

- **Glossary of Terms**

- **Account Hierarchy:** A hierarchical structure representing the relationships between accounts, typically with parent and child accounts.
- **Ultimate Parent:** The top-level account in an account hierarchy, with no parent account above it.
- **Rollup:** The process of aggregating or summarizing data from child records to their respective parent records.