



Account Hierarchy Package

The Complete Account View for Salesforce

AppShark's has developed a unique Account Hierarchy customization package which allows you to customize your account hierarchy page in Salesforce to suit your specific business requirements. The customization allows you to view all the hierarchical accounts associated through the parent account and directly edit/customize any account from the hierarchy itself.

Limitations of the Standard Account Hierarchy package:

Under the Standard Account Hierarchy:

- ☁ The main Account Hierarchy page view cannot be edited or customized
- ☁ A limited number of columns are displayed and the headers cannot be edited, sorted or changed
- ☁ The associated accounts cannot be edited from the main account hierarchy page



Benefits of AppShark's Account Hierarchy package:

AppShark's customized Account Hierarchy package has the following features:

- ☁ A user can customize columns to be displayed in the Account Hierarchy using a configuration page
- ☁ Open the Account in Edit mode from the Account Hierarchy View with a single click (Not applicable with Salesforce1)
- ☁ Record type based Hierarchy View
- ☁ See the hierarchy both inline and on a separate page
- ☁ The selected account is highlighted in the hierarchy
- ☁ Ability to display more than 1000 records in the Hierarchy view
- ☁ Expand and Collapse the Records in Hierarchy view
- ☁ Ability to show the data from one related object to Account under each Account in the hierarchy view (Not supported in Salesforce1)
- ☁ The package is now compatible with Salesforce1 for Tablets

FINANCIAL SERVICES

Financial Services Companies need to connect with their clients on a deeper level.

Companies having operations around the world can use our package to list their headquarters as 'Parent Account' and associate the branch operations as child accounts to view the whole hierarchy. The locations of the branches can also be specified using the "Account Site" field for the associated accounts.

MANUFACTURING

Manufacturing companies can use the package to build stronger relationships with their consumers, channel partners and suppliers.

Manufacturing units which have offices around the globe can create accounts with customized columns/fields for different locations and view the hierarchy with only those specific fields that are required.

MEDIA

Media is all about creating connections and networks. Media companies can connect with people on a broader level and help their teams work together to improve customer experience.



ACCOUNT HIERARCHY

Account Hierarchy Package

The Complete Account View for Salesforce

A Global View of Account Hierarchy

AppShark's Account Hierarchy customization package was developed keeping in mind the unique challenges faced by different verticals/industries when it comes to building stronger relationships with clients and employees.



This package helps different verticals connect better with their customers, partners and subsidiaries thus leading to operational efficiency and organizational growth.

AppShark Account Hierarchy Configuration

Create New...

Account Hierarchy

The hierarchy is created by associating accounts with parent accounts.

Action	Name	Account Number	Opportunity pipeline amounts	Closed revenues	Billing City	Billing Country
☒	ABC Banking	ABC0023395	\$380,000.00	\$300,000.00	New York	USA
☒	ABC Banking - Australia	ABC0055699	\$280,000.00	\$230,000.00	Australia	Australia
☒	ABC Banking - Brisbane	ABC009558R	\$230,000.00	\$210,000.00	Brisbane City	Australia
☒	ABC Banking - China	ABC0069558	\$360,000.00	\$350,000.00	Lee City	China
☒	ABC Banking - India	ABC009558	\$45,000.00	\$41,000.00	Panducherry	India
☒	ABC Banking - Russia	ABC033555	\$66,000.00	\$56,000.00	Moscow	Russia
☒	ABC Banking - USA	ABC0026636	\$96,000.00	\$95,000.00	Washington BC	USA

Account Hierarchy

Action	Name	Opportunity pipeline amounts	Closed revenues	Billing City	Billing Country	Owner
☒	ABC Banking	\$380,000.00	\$300,000.00	New York	USA	Appshark User
☒	ABC Banking - Australia	\$280,000.00	\$230,000.00	Australia	Australia	Appshark User
☒	ABC Banking - Adelaide			Adelaide	Australia	Appshark User
☒	Test Account For Aussies					Appshark User
☒	ABC Banking - Sydney			Sydney City	Australia	Appshark User
☒	ABC Banking - Brisbane	\$230,000.00	\$210,000.00	Brisbane City	Australia	Appshark User
☒	ABC Banking - China	\$360,000.00	\$350,000.00	Lee City	China	Appshark User
☒	ABC Banking - India	\$45,000.00	\$41,000.00	Panducherry	India	Appshark User
☒	ABC Banking - Russia	\$66,000.00	\$56,000.00	Moscow	Russia	Appshark User
☒	ABC Banking - USA	\$96,000.00	\$95,000.00	Washington BC	USA	Appshark User

International media enterprises have several business segments. The head office can be listed as the parent account for all subsidiaries and filters such as location, industry, etc can be put in place to customize the display.

RETAIL

The retail sector is rapidly expanding and there is a growing demand for new ways to connect with customers

A big retailer with stores located throughout the country can use the Account Hierarchy to view its chain of subsidiaries by listing the parent company as the 'Parent Account'.

HEALTHCARE

In a fast-paced world, meeting healthcare challenges requires effective and efficient sharing and collaboration between different teams.

A healthcare organization with multiple branches can use our Account Hierarchy package to get a global view of the company and its branches/subsidiaries.



As a Salesforce Registered Partner, AppShark offers superior Salesforce and Cloud Consulting services along with existing custom development and integration solutions. We have a dedicated team of consultants with the experience to offer the best possible advisory services including:

- Salesforce Customization
- Administration & Configuration
- Advanced Salesforce Development
- Design
- Integration
- Training and End user adoption

Our certified Salesforce consultants are able to assess and recommend the right approaches to simplify and streamline your Salesforce deployment. We have completed over 200 Salesforce projects to date, covering all aspects of Salesforce CRM.

AppShark also offers a strong portfolio of solutions in Development and Integration such as:

- Mobile (Native, Hybrid) app development
- Web app development (Java, .NET, HTML5)
- Integration services
- Custom Cloud migration and deployment

Aside from our own teams of experienced developers, project managers, architects, DBAs, consultants, quality assurance testers and business analysts, we work with independent software vendors (ISVs), startups, Salesforce application developers, manufacturers and service providers using software as part of their business model or product solution.

Product Development is another of our core strengths and our products include:

- Unified Broadcasting system (UBS) - a comprehensive message broadcasting solution that sends messages to different audiences based on the type and content of the message.
- OpenSMS - a unique way to send and track text messages to leads, customers and other contacts.
- Tablet 20 - a geo-location app designed to help sales teams and managers track location data and account visits for better visibility over mobile teams.

AppShark has also designed a customized Lead Conversion package which is listed on the AppExchange.

About AppShark

Established in 2007, AppShark is a Salesforce Registered Consulting Partner offering superior Salesforce and Cloud Consulting services along with custom development and mobile solutions. With a customer satisfaction rating of 9.7 out of 10 on the AppExchange, in 2013, AppShark was acknowledged as a top Salesforce Consultant by SourcingLine.

With our headquarters located in Dallas and the global development facility in Hyderabad, India, we offer both onsite and offsite/offshore project delivery models.