

AppShark Account Hierarchy Package

The Complete Account View for Salesforce



Account Hierarchy Installation Guide

This document provides step by step instructions for installing the Account Hierarchy package.

User Permissions Required:

- 'Read' and 'Edit' permissions in 'Accounts'
- Enabled Apex Class Access
- Enabled Visualforce Page Access

Steps to Install the Package from AppExchange:

Step 1 a:

To begin the installation, click the Get It Now button on the AppShark Account Hierarchy listing on AppExchange and follow the instructions to install the application



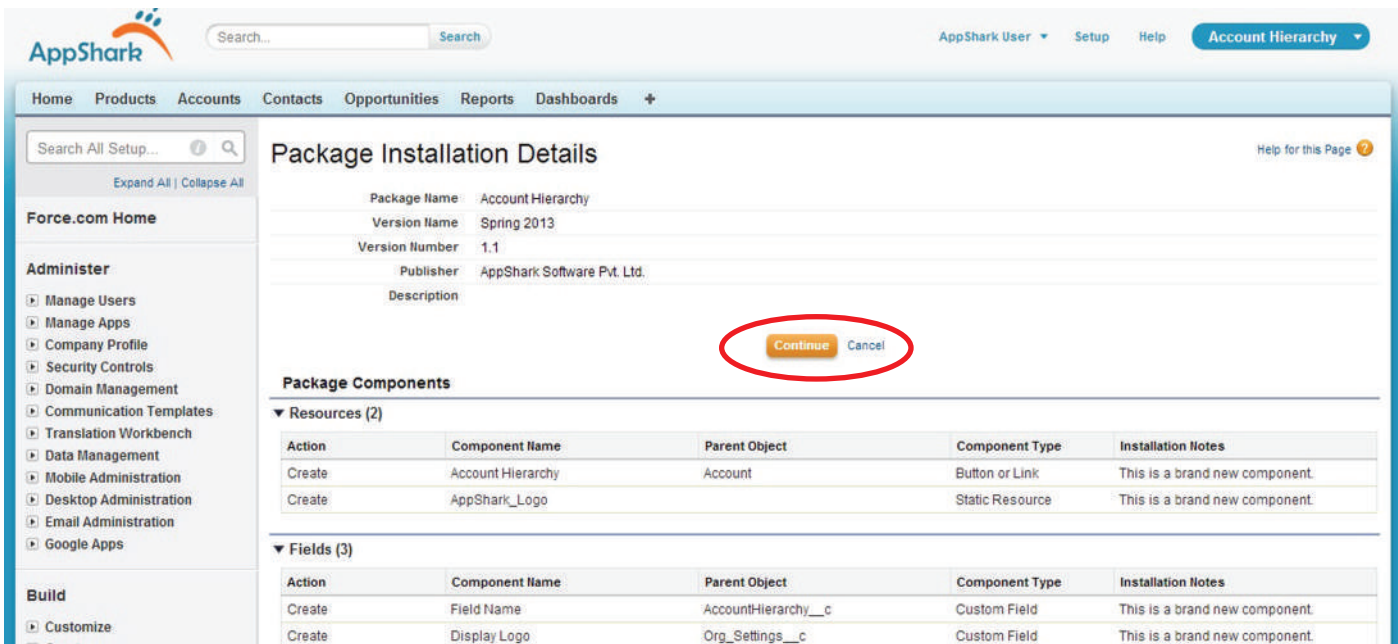
Step 1 b:

Log in with your Salesforce credentials



Step 2:

The screen displays the package details; click on 'Continue' to install the package



Package Installation Details

Package Name: Account Hierarchy
 Version Name: Spring 2013
 Version Number: 1.1
 Publisher: AppShark Software Pvt. Ltd.
 Description:

Continue **Cancel**

Package Components

▼ Resources (2)

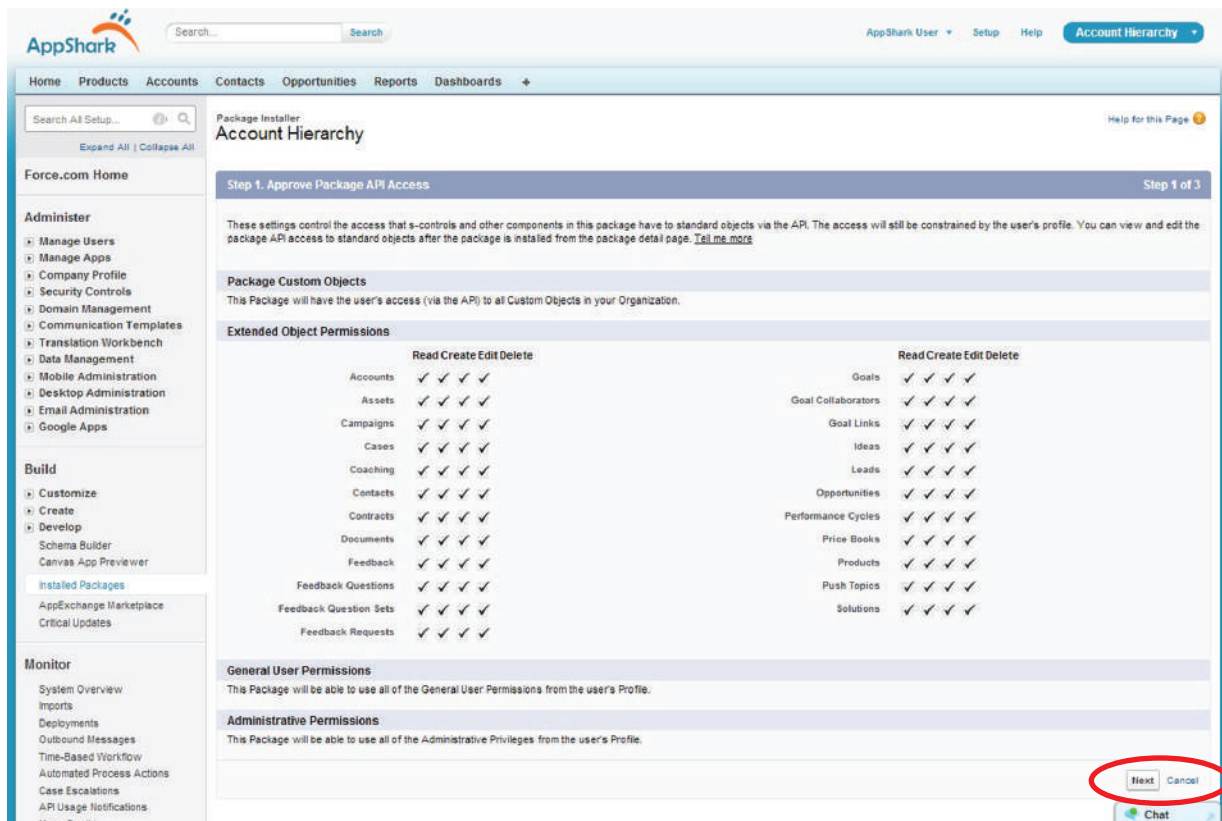
Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Account Hierarchy	Account	Button or Link	This is a brand new component.
Create	AppShark_Logo		Static Resource	This is a brand new component.

▼ Fields (3)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Field Name	Account_Hierarchy__c	Custom Field	This is a brand new component.
Create	Display Logo	Org_Settings__c	Custom Field	This is a brand new component.

Step 3:

The steps for 'Approve Package API Access' is shown below; click on 'Next' to proceed



Package Installer: Account Hierarchy

Step 1 of 3: Approve Package API Access

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects
 This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions

	Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓
Assets	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓
Cases	✓	✓	✓	✓
Coaching	✓	✓	✓	✓
Contacts	✓	✓	✓	✓
Contracts	✓	✓	✓	✓
Documents	✓	✓	✓	✓
Feedback	✓	✓	✓	✓
Feedback Questions	✓	✓	✓	✓
Feedback Question Sets	✓	✓	✓	✓
Feedback Requests	✓	✓	✓	✓

	Read	Create	Edit	Delete
Goals	✓	✓	✓	✓
Goal Collaborators	✓	✓	✓	✓
Goal Links	✓	✓	✓	✓
Ideas	✓	✓	✓	✓
Leads	✓	✓	✓	✓
Opportunities	✓	✓	✓	✓
Performance Cycles	✓	✓	✓	✓
Price Books	✓	✓	✓	✓
Products	✓	✓	✓	✓
Push Topics	✓	✓	✓	✓
Solutions	✓	✓	✓	✓

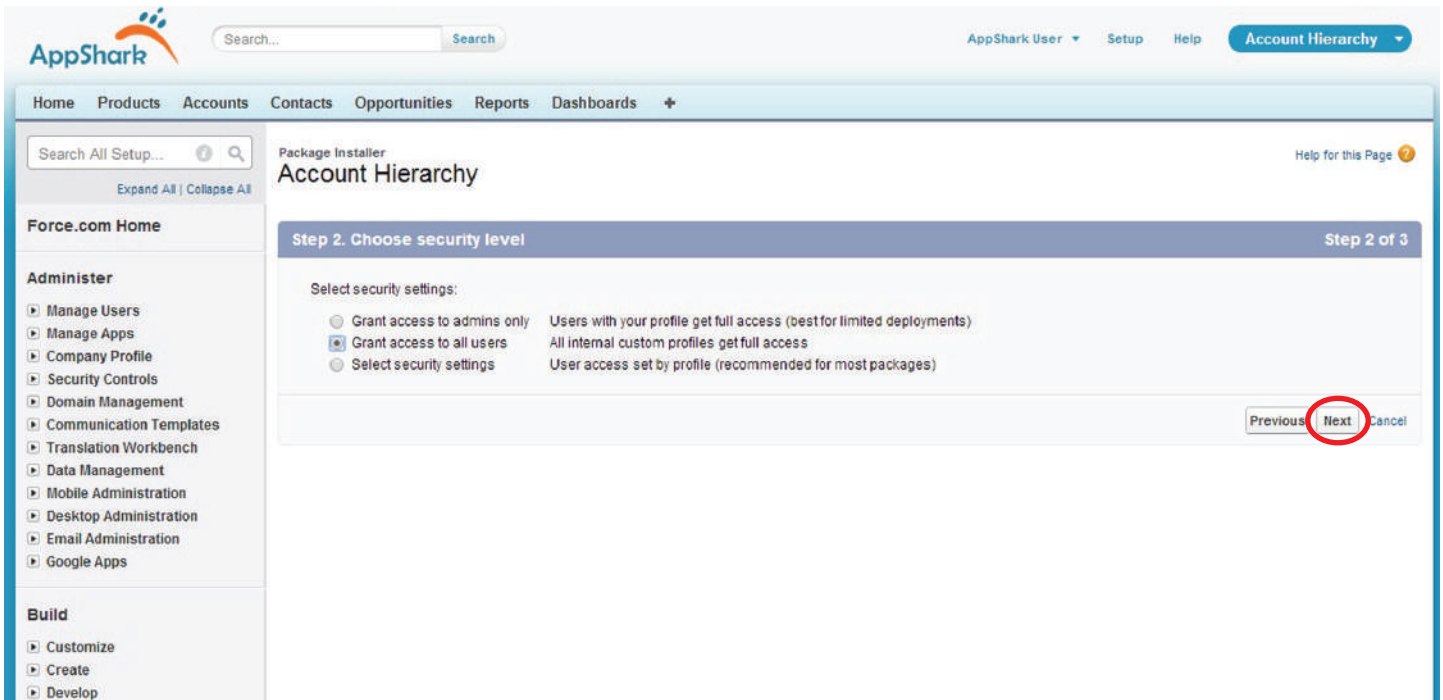
General User Permissions
 This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions
 This Package will be able to use all of the Administrative Privileges from the user's Profile.

Next **Cancel**

Step 4:

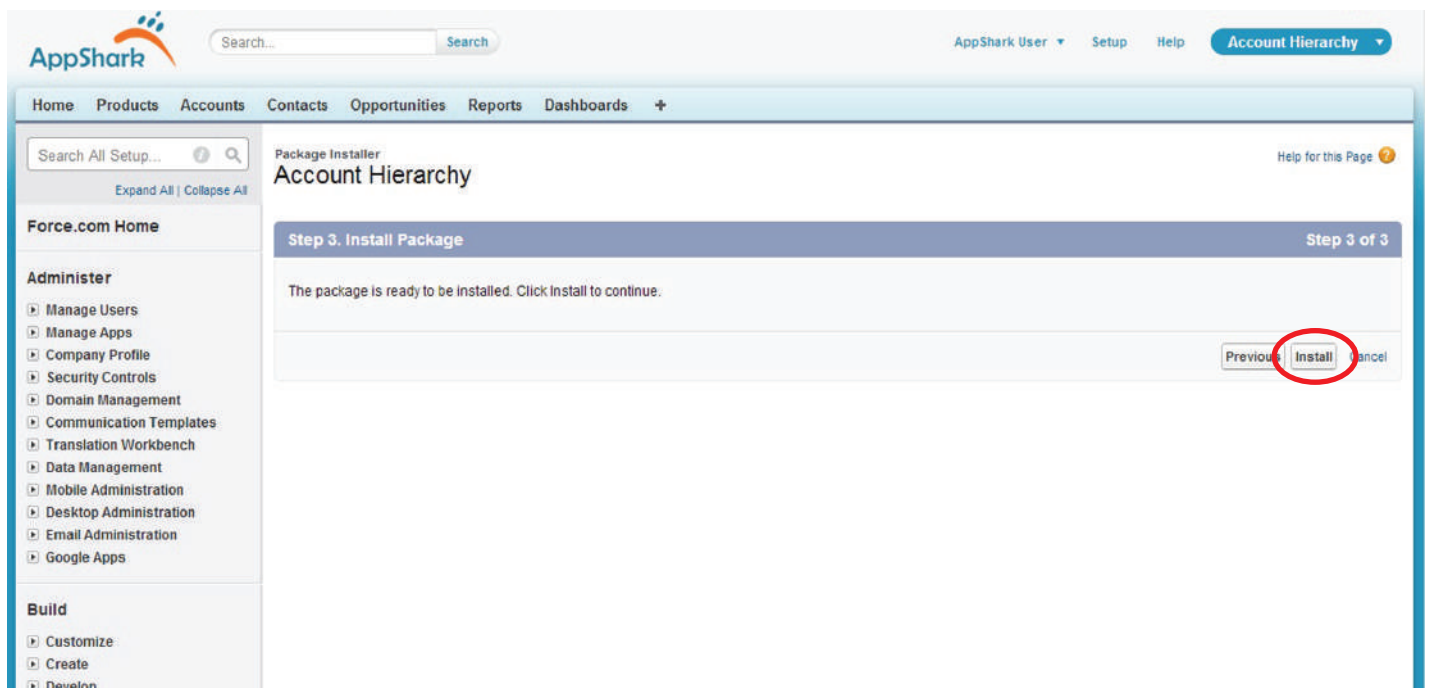
Choose the Security Level and click on 'Next' to proceed



The screenshot shows the AppShark interface for the 'Account Hierarchy' setup. The top navigation bar includes 'Home', 'Products', 'Accounts', 'Contacts', 'Opportunities', 'Reports', and 'Dashboards'. The left sidebar lists 'Force.com Home' and 'Administer' options. The main content area is titled 'Package Installer Account Hierarchy' and shows 'Step 2 of 3: Choose security level'. It presents three security settings: 'Grant access to admins only', 'Grant access to all users' (selected), and 'Select security settings'. At the bottom right, the 'Next' button is circled in red.

Step 5:

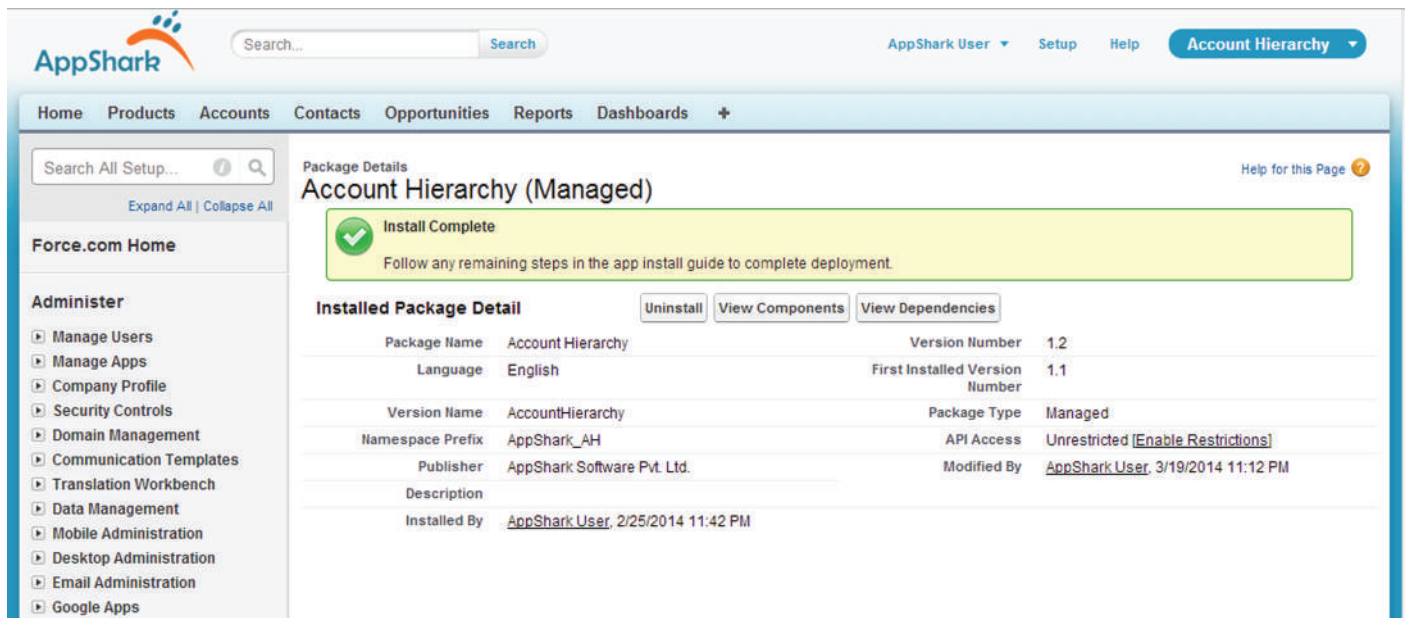
Select 'Install' to complete the installation process



The screenshot shows the AppShark interface for the 'Account Hierarchy' setup, now at 'Step 3 of 3: Install Package'. The main content area states 'The package is ready to be installed. Click Install to continue.' At the bottom right, the 'Install' button is circled in red.

Step 6:

Once the installation is complete, the following page will be displayed



Account Hierarchy (Managed)

Install Complete
Follow any remaining steps in the app install guide to complete deployment.

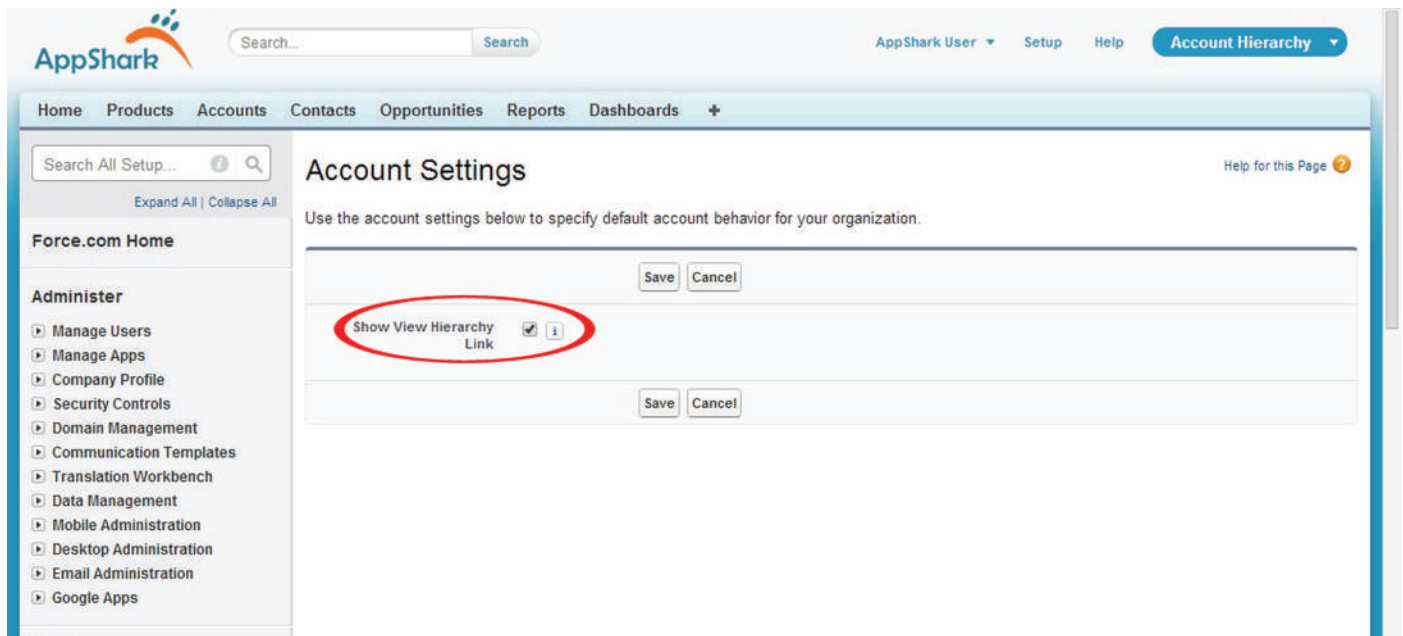
Installed Package Detail

Package Name	Account Hierarchy	Version Number	1.2
Language	English	First Installed Version Number	1.1
Version Name	AccountHierarchy	Package Type	Managed
Namespace Prefix	AppShark_AH	API Access	Unrestricted [Enable Restrictions]
Publisher	AppShark Software Pvt. Ltd.	Modified By	AppShark User, 3/19/2014 11:12 PM
Description			
Installed By	AppShark User, 2/25/2014 11:42 PM		

Changes to Account Page Layout:

To use customized Account Hierarchy package, the standard link “View Hierarchy” needs to be removed. These settings have to be changed manually as it cannot be included in the package.

Go to Customize → Accounts → Settings and uncheck Show View Hierarchy Link



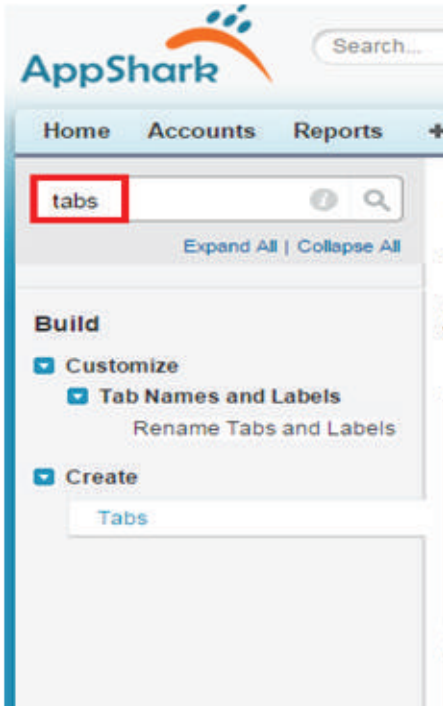
Account Settings

Use the account settings below to specify default account behavior for your organization.

Save Cancel Show View Hierarchy Link ☒ Save Cancel

Adding Account Hierarchy Configuration tab:-

From Settings, go to Tabs.



Navigate to Visualforce Tabs and add New

Custom Tabs

[Help for this Page](#)

You can create new custom tabs to extend salesforce.com functionality or to build new application functionality.

Custom Object Tabs look and behave like the standard tabs provided with salesforce.com. Web Tabs allow you to embed external web applications and content within the salesforce.com window. Visualforce Tabs allow you to embed Visualforce Pages. Lightning Component tabs allow you to add Lightning Components to the navigation menu in Salesforce1.

Custom Object Tabs			
		New	What Is This?
Action	Label	Tab Style	Description
Edit	Error Codes	 Books	
Edit	SMS Gateways	 PDA	
Edit	SMS Logs	 Alarm clock	
Web Tabs			
		New	What Is This?
No Web Tabs have been defined			
Visualforce Tabs			
		New	What Is This?
Action	Label	Tab Style	Description
Edit	SMS Overview	 Cell phone	
Edit	Support	 Diamond	For Queries and Support

Fill in the exact details given below:

New Visualforce Tab

Help for this Page ?

Step 1. Enter the Details

Step 1 of 3

Choose the page for this new tab. Fill in other details.

Select an existing page or [create a new page now](#).

Visualforce Page

AccountHierarchyConfig [AppShark_AH_AccountHierarchyConfig] ▼

Tab Label

Account Hierarchy Configura

Tab Name

Account_Hierarchy_Configur*i*

Tab Style

Gears

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link

--None-- ▼

Enter a short description.

Description

Next

Cancel

Visualforce Page: Account Hierarchy Config (it is the second one on the drop-down list)

Tab Label: Account Hierarchy Configuration

Tab Name: Account Hierarchy Configuration (automatically populated once Tab Label is given)

Tab Style: Gears (select it from the display box that opens)

The rest will remain as is shown in the screenshot, click Next

On this page, select who you want to display this tab to, by choosing one of the two options.

Alternatively, click on Apply Tab Visibility to All, select Default OFF and then click on the second one, Apply a Different Visibility for each Profile, scroll down the list to System Administrator and from the drop-down, choose Default On.

New Visualforce Tab

[Help for this Page](#) 

Step 2. Add to Profiles

Step 2 of 3

Choose the user profiles for which the new page tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

☒ Apply one tab visibility to all profiles Default On
☐ Apply a different tab visibility for each profile

Profile	Tab Visibility
Authenticated Website	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On
Customer Community Plus User	Default On
Customer Community User	Default On
Customer Portal Manager Custom	Default On
Customer Portal Manager Standard	Default On
External Identity User	Default On
Force.com - App Subscription User	Default On
Force.com - Free User	Default On
Gold Partner User	Default On
High Volume Customer Portal	Default On
Identity User	Default On
Marketing User	Default On
Partner App Subscription User	Default On
Partner Community Login User	Default On
Partner Community User	Default On
Read Only	Default On
Silver Partner User	Default On
Solution Manager	Default On
Standard Platform User	Default On
Standard User	Default On
System Administrator	Default On
Work.com Only User	Default On

Chat

Previous

Next

Cancel

On this page, ensure that all check boxes are checked and click Save.

Step 3. Add to Custom Apps
Step 3 of 3

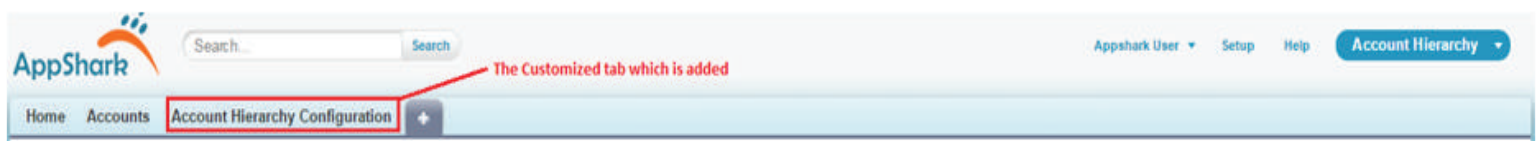
Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	☑ Include Tab
Platform	☑
Sales	☑
Call Center	☑
Marketing	☑
Sample Console	☑
High Volume Customer Portal User	☑
Authenticated Website User	☑
App Launcher	☑
Community	☑
Site.com	☑
Salesforce Chatter	☑
Profile (Self)	☑
Profile (Others)	☑
Content	☑
Account Hierarchy	☑
Open SMS	☑

☒ Append tab to users' existing personal customizations

Previous Save Cancel

This is what is displayed as the Configuration tab is added to the menu bar.



Adding the Account Hierarchy button on the account page layout:-

Under Setup go to Customize → Accounts → Page layouts.



Account Page Layout

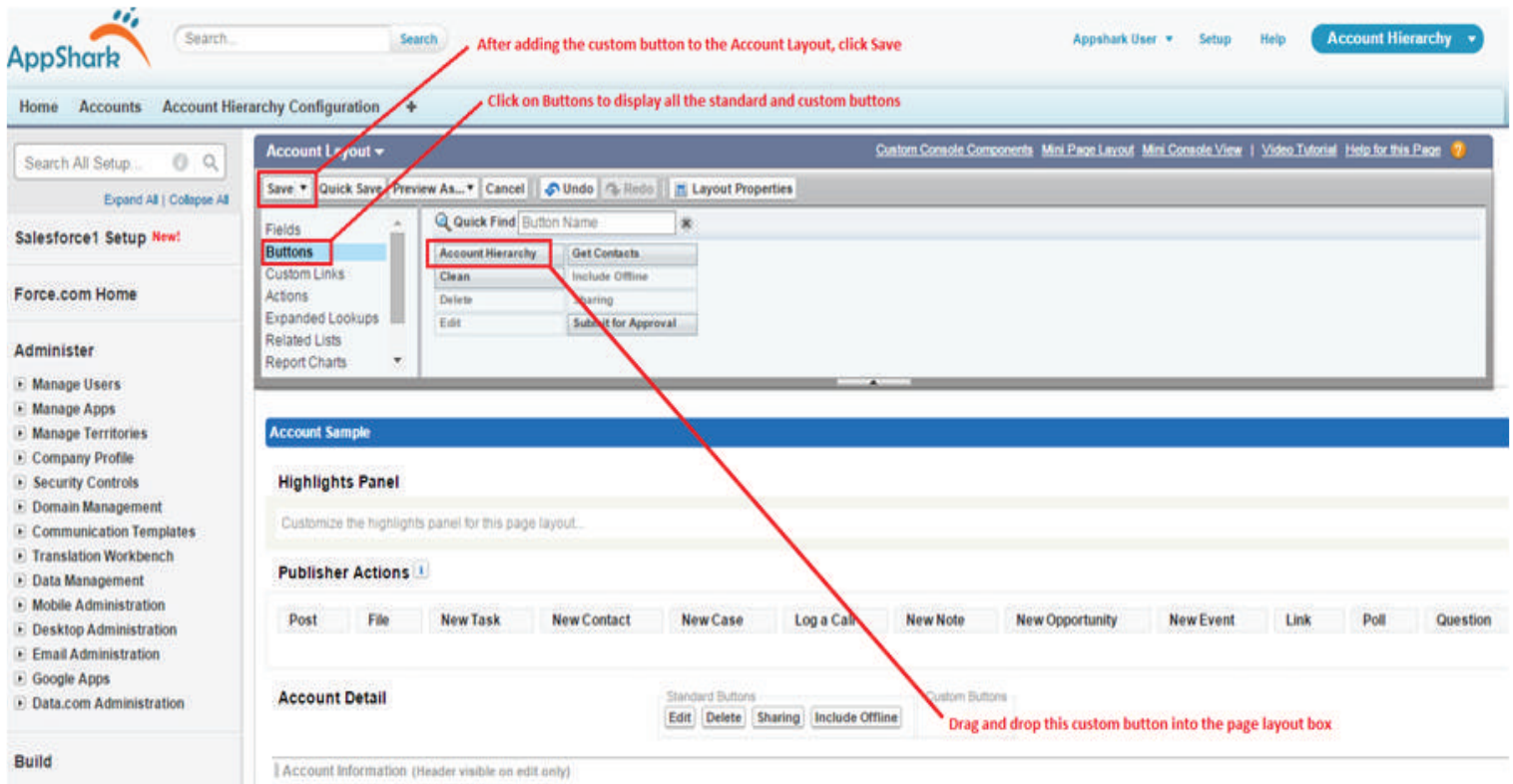
[Help for this Page](#)

This page allows you to create different page layouts to display Account data.
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Account Page Layouts				
		New Page Layout Assignment		
Action	Page Layout Name	Created By	Modified By	Feed-Based Layout
Edit Del	Account (Marketing) Layout	Appshark User , 11/30/2014 9:44 PM	Appshark User , 12/17/2014 12:39 AM	☐
Edit Del	Account (Sales) Layout	Appshark User , 11/30/2014 9:44 PM	Appshark User , 12/17/2014 4:18 AM	☐
Edit Del	Account (Support) Layout	Appshark User , 11/30/2014 9:44 PM	Appshark User , 12/17/2014 4:07 AM	☐
Edit Del	Account Layout	Appshark User , 11/30/2014 9:44 PM	Appshark User , 12/18/2014 9:48 PM	☐

Click on Edit

When this page opens, click on Edit (beside Account layout) to add the Account hierarchy inline VF page.

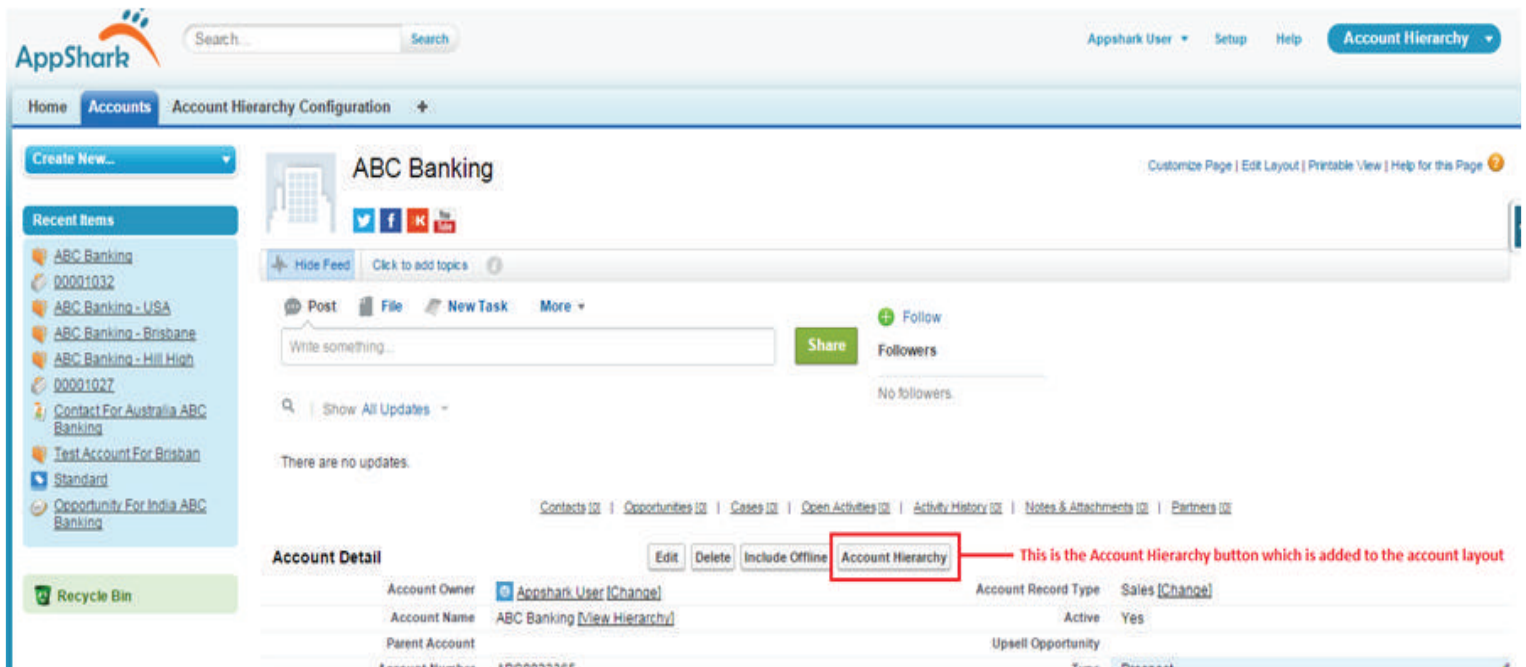


Click on Buttons - This is where the user gets all the standard and custom buttons on account

Drag and drop the custom “**Account hierarchy**” button onto the page layout section as shown in the screen shot below.

Then click on SAVE button. This will apply all the changes done to the page layout of account and we will be seeing the “**Account Hierarchy**” button on account detail page.

This is how it looks after the button is added to the account page layout.



AppShark User Setup Help Account Hierarchy

Home Accounts Account Hierarchy Configuration

Create New...

Recent Items

- ABC Banking
- 00001032
- ABC Banking - USA
- ABC Banking - Brisbane
- ABC Banking - Hill High
- 00001027
- Contact For Australia ABC Banking
- Test Account For Brisbane
- Standard
- Opportunity For India ABC Banking

Recycle Bin

ABC Banking

Hide Feed Click to add topics

Post File New Task More

Write something...

Share Follow

Followers

No followers

Show All Updates

There are no updates.

Contacts Opportunities Cases Open Activities Activity History Notes & Attachments Partners

Account Detail

Edit Delete Include Offline **Account Hierarchy**

Account Owner Appshark User [Change]

Account Name ABC Banking [View Hierarchy]

Parent Account

Account Member AB00000000

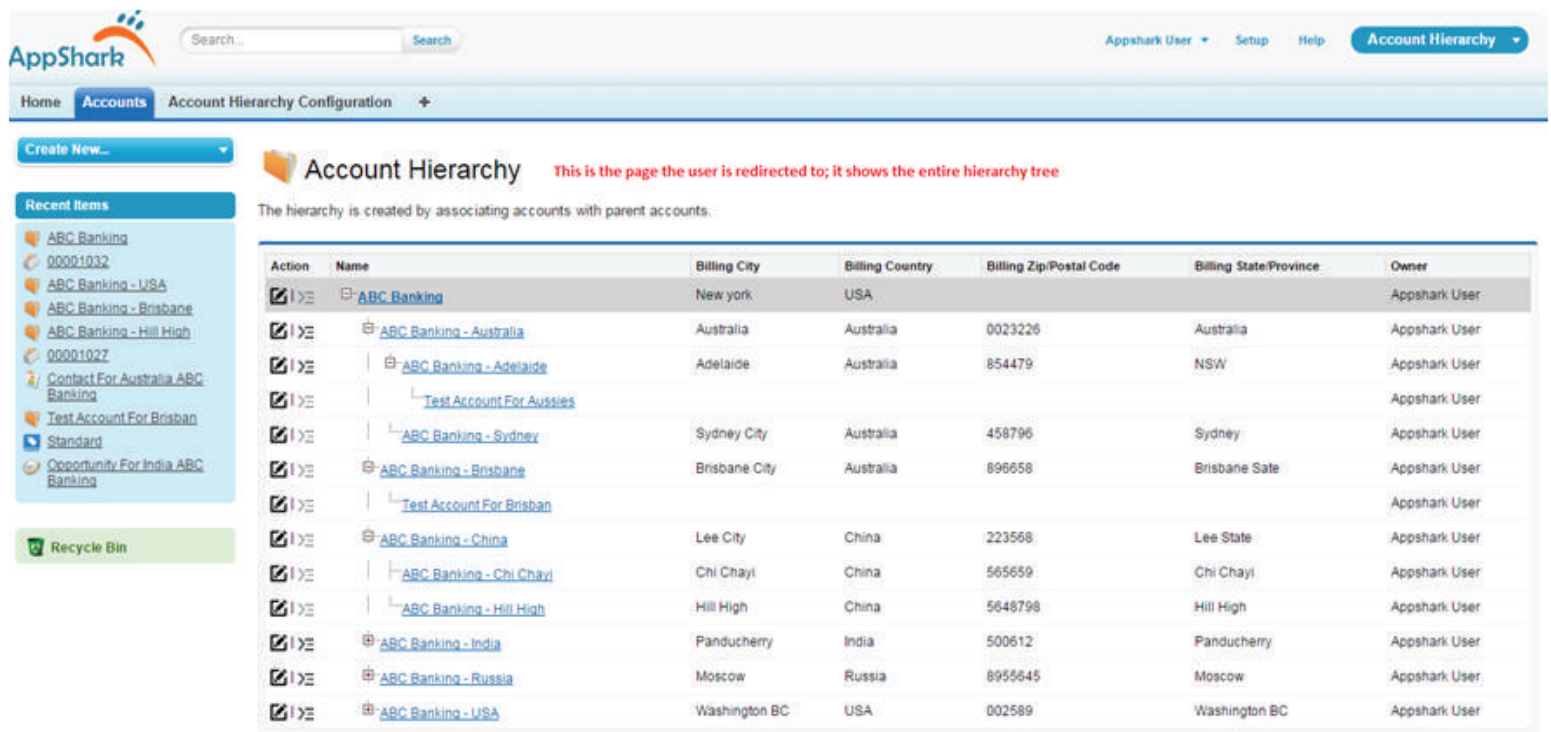
Account Record Type Sales [Change]

Active Yes

Upsell Opportunity

Time

Click on the 'Account hierarchy' button which redirects the user to a new page showing the entire account hierarchy tree.



AppShark User Setup Help Account Hierarchy

Home Accounts Account Hierarchy Configuration

Create New...

Recent Items

- ABC Banking
- 00001032
- ABC Banking - USA
- ABC Banking - Brisbane
- ABC Banking - Hill High
- 00001027
- Contact For Australia ABC Banking
- Test Account For Brisbane
- Standard
- Opportunity For India ABC Banking

Recycle Bin

Account Hierarchy

This is the page the user is redirected to; it shows the entire hierarchy tree

The hierarchy is created by associating accounts with parent accounts.

Action	Name	Billing City	Billing Country	Billing Zip/Postal Code	Billing State/Province	Owner
☒ ☐	ABC Banking	New York	USA			Appshark User
☒ ☐	ABC Banking - Australia	Australia	Australia	0023226	Australia	Appshark User
☒ ☐	ABC Banking - Adelaide	Adelaide	Australia	854479	NSW	Appshark User
☒ ☐	Test Account For Aussies					Appshark User
☒ ☐	ABC Banking - Sydney	Sydney City	Australia	458796	Sydney	Appshark User
☒ ☐	ABC Banking - Brisbane	Brisbane City	Australia	896658	Brisbane Sate	Appshark User
☒ ☐	Test Account For Brisbane					Appshark User
☒ ☐	ABC Banking - China	Lee City	China	223568	Lee State	Appshark User
☒ ☐	ABC Banking - Chi Chayi	Chi Chayi	China	565659	Chi Chayi	Appshark User
☒ ☐	ABC Banking - Hill High	Hill High	China	5648798	Hill High	Appshark User
☒ ☐	ABC Banking - India	Panducherry	India	500612	Panducherry	Appshark User
☒ ☐	ABC Banking - Russia	Moscow	Russia	8956645	Moscow	Appshark User
☒ ☐	ABC Banking - USA	Washington BC	USA	002589	Washington BC	Appshark User

Adding Inline Visual force page on account page layout:-

Click on Setup → Customize → Accounts → Page layouts.



Account Page Layout

[Help for this Page](#) ?

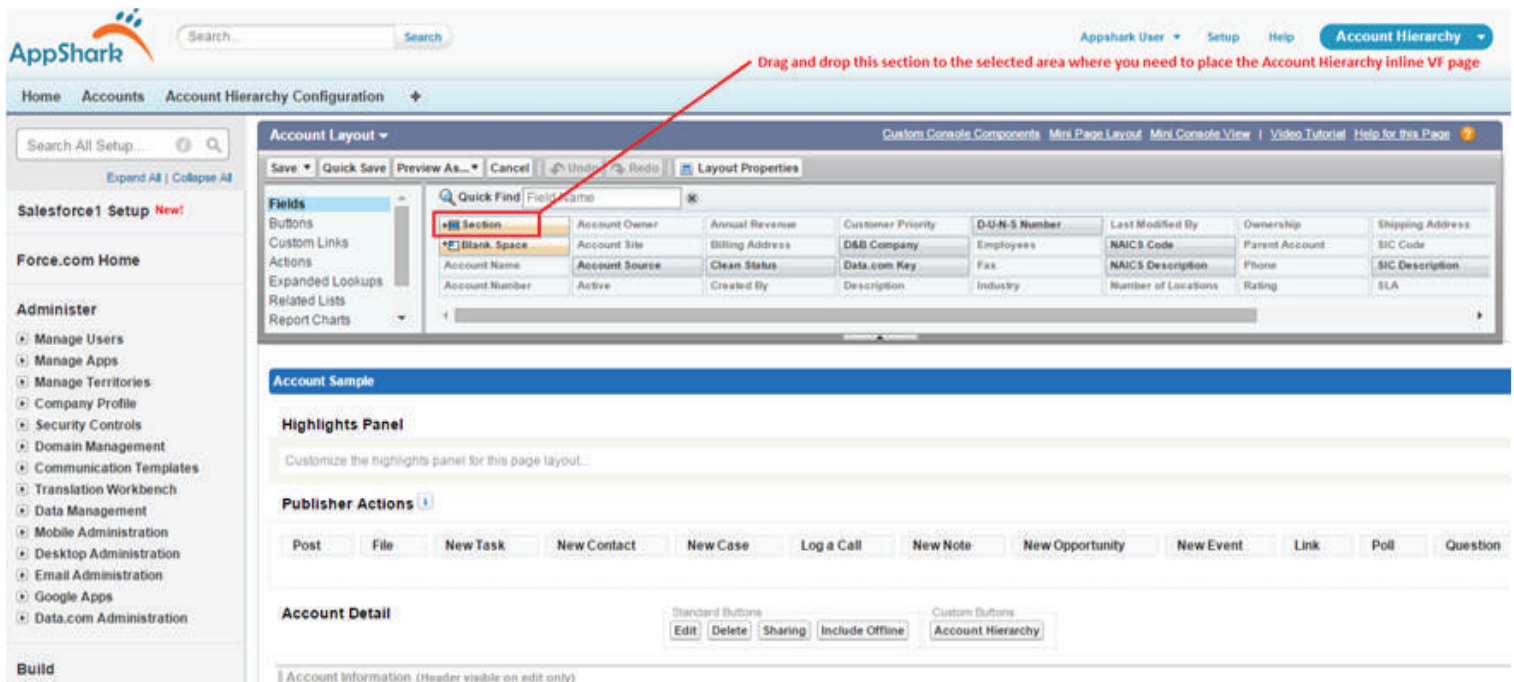
This page allows you to create different page layouts to display Account data.
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Account Page Layouts				
		New Page Layout Assignment		
Action	Page Layout Name	Created By	Modified By	Feed-Based Layout
Edit Del	Account (Marketing) Layout	Appshark User , 11/30/2014 9:44 PM	Appshark User , 12/17/2014 12:39 AM	☐
Edit Del	Account (Sales) Layout	Appshark User , 11/30/2014 9:44 PM	Appshark User , 12/17/2014 4:18 AM	☐
Edit Del	Account (Support) Layout	Appshark User , 11/30/2014 9:44 PM	Appshark User , 12/17/2014 4:07 AM	☐
Edit Del	Account Layout	Appshark User , 11/30/2014 9:44 PM	Appshark User , 12/18/2014 9:48 PM	☐

Click on Edit

When this page opens, click on Edit (beside Account layout) to add the Account hierarchy inline VF page.

Click on Section and drag it to the selected area where you need to add the account hierarchy VF page.



Drag and drop this section to the selected area where you need to place the Account Hierarchy inline VF page

Account Layout

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Fields

- Buttons
- Custom Links
- Actions
- Expanded Lookups
- Related Lists
- Report Charts

Account Owner Annual Revenue Customer Priority D-U-N-S Number Last Modified By Ownership Shipping Address

Account Site Billing Address D&B Company Employees NAICS Code Parent Account SIC Code

Account Name Account Source Clean Status Data.com Key Fax NAICS Description Phone SIC Description

Account Number Active Created By Description Industry Number of Locations Rating SLA

Account Sample

Highlights Panel

Customize the highlights panel for this page layout.

Publisher Actions

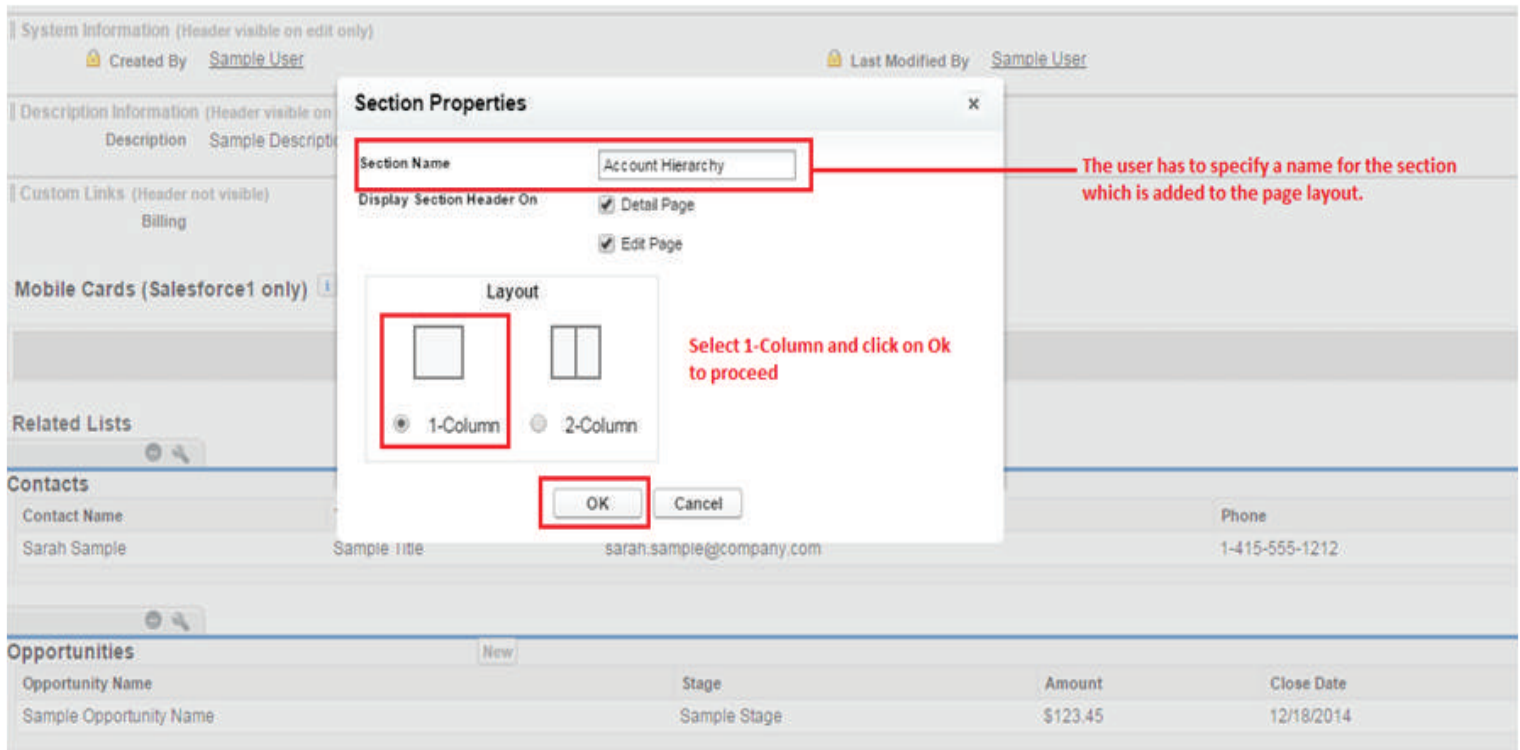
Post File New Task New Contact New Case Log a Call New Note New Opportunity New Event Link Poll Question

Account Detail

Standard Buttons Edit Delete Sharing Include Offline Custom Buttons Account Hierarchy

Account Information (Header visible on edit only)

The Section name should be specified. Select 1 column and click on OK to proceed.



System Information (Header visible on edit only)

Created By Sample User Last Modified By Sample User

Description Information (Header visible on edit only)

Description Sample Description

Custom Links (Header not visible)

Billing

Mobile Cards (Salesforce1 only)

Related Lists

Contacts

Contact Name Sarah Sample

Sample title sarah.sample@company.com

Phone 1-415-555-1212

Opportunities

New

Opportunity Name Stage Amount Close Date

Sample Opportunity Name Sample Stage \$123.45 12/18/2014

Section Properties

Section Name Account Hierarchy

Display Section Header On

Detail Page

Edit Page

Layout

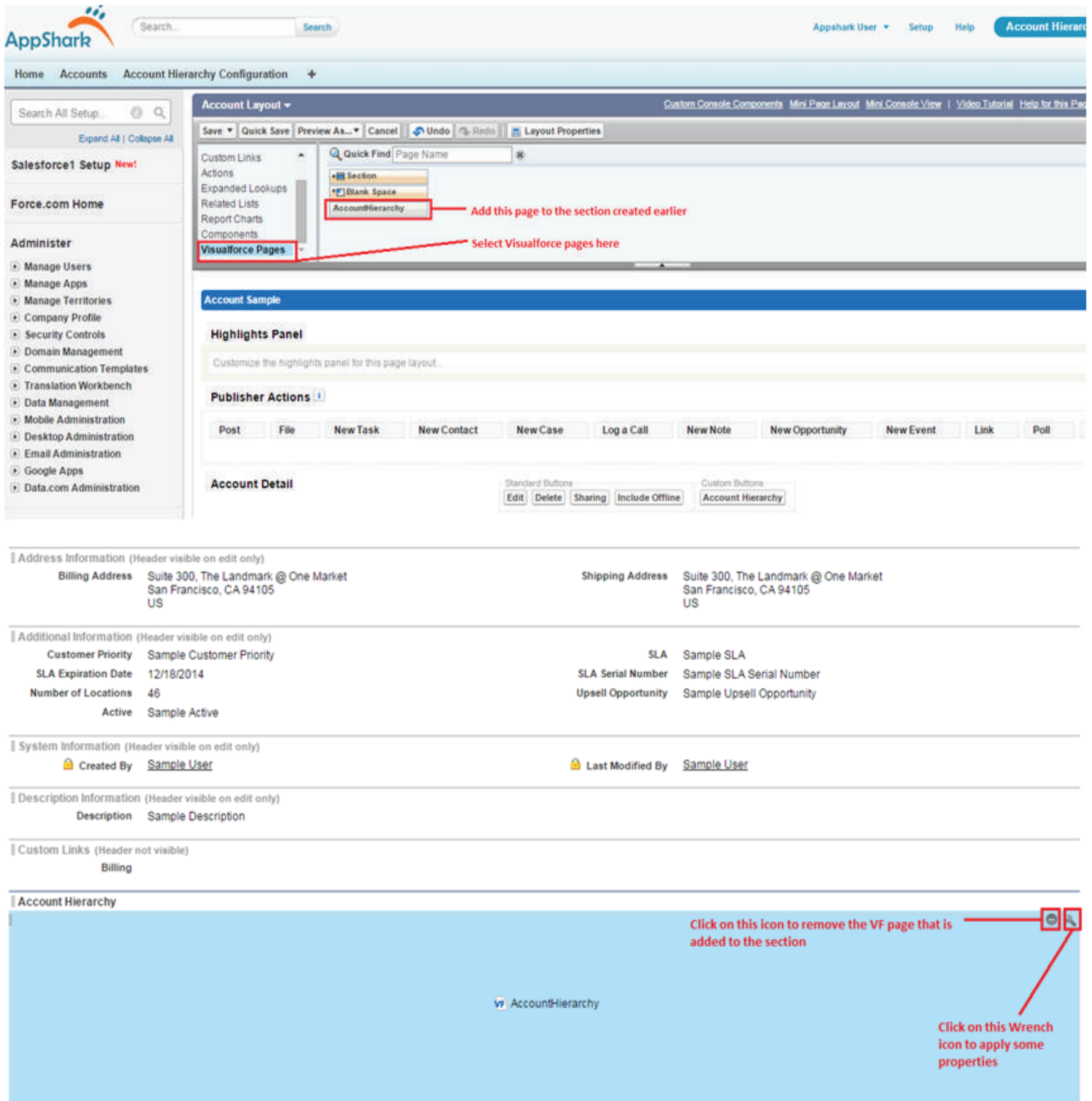
1-Column 2-Column

Select 1-Column and click on Ok to proceed

OK Cancel

The user has to specify a name for the section which is added to the page layout.

Select Visual force pages from the list, click on the Account Hierarchy VF page and drag and drop it to the required section



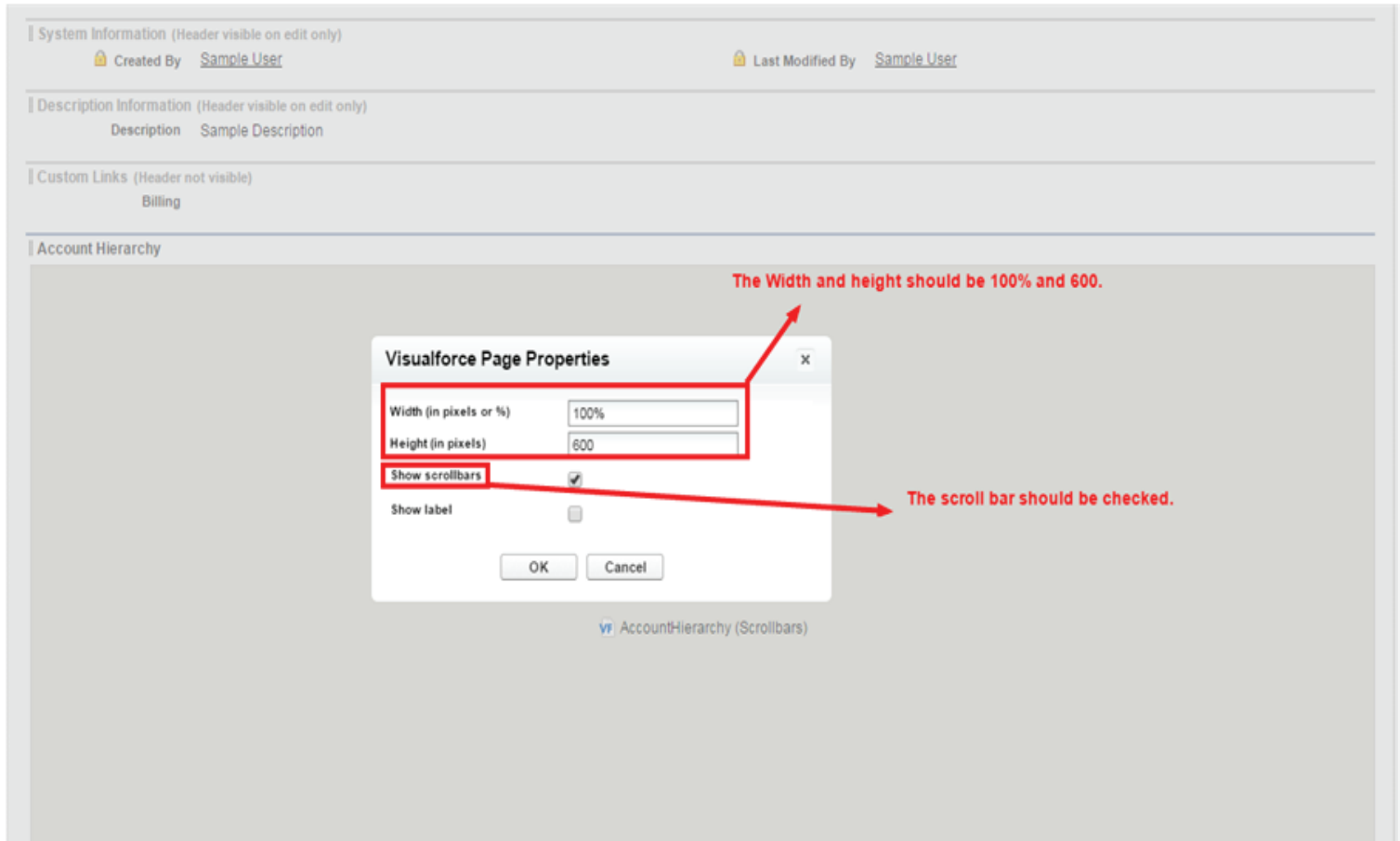
The screenshot shows the AppShark interface for configuring an Account Hierarchy. The left sidebar contains navigation links for Home, Accounts, and Account Hierarchy Configuration. The main area displays the 'Account Layout' configuration. A 'Quick Find' search bar is present, and a list of components is shown, including 'Section', 'Blank Space', and 'Account Hierarchy'. A red box highlights the 'Account Hierarchy' component, with a red arrow pointing to it and the text 'Add this page to the section created earlier'. Another red box highlights the 'Visualforce Pages' section, with a red arrow pointing to it and the text 'Select Visualforce pages here'. Below the configuration area, a preview of the 'Account Sample' layout is shown, including a 'Highlights Panel', 'Publisher Actions' (Post, File, New Task, New Contact, New Case, Log a Call, New Note, New Opportunity, New Event, Link, Poll), and 'Account Detail' buttons (Edit, Delete, Sharing, Include Offline, Account Hierarchy). The bottom section displays various information fields: Address Information (Billing and Shipping addresses), Additional Information (Customer Priority, SLA, SLA Serial Number, Upsell Opportunity), System Information (Created By, Last Modified By), Description Information (Description), Custom Links (Billing), and Account Hierarchy (Account Hierarchy). A red box highlights the 'Account Hierarchy' section, with a red arrow pointing to it and the text 'Click on this Wrench icon to apply some properties'. Another red box highlights the 'Account Hierarchy' section, with a red arrow pointing to it and the text 'Click on this icon to remove the VF page that is added to the section'.

After the VF page is added to the section, Click on the Wrench icon to edit VF properties.

The Width and height should be given as specified in the above screen shot.

Ensure that the 'Show scroll bar' box is always checked.

Click on OK to continue and then click on Save.

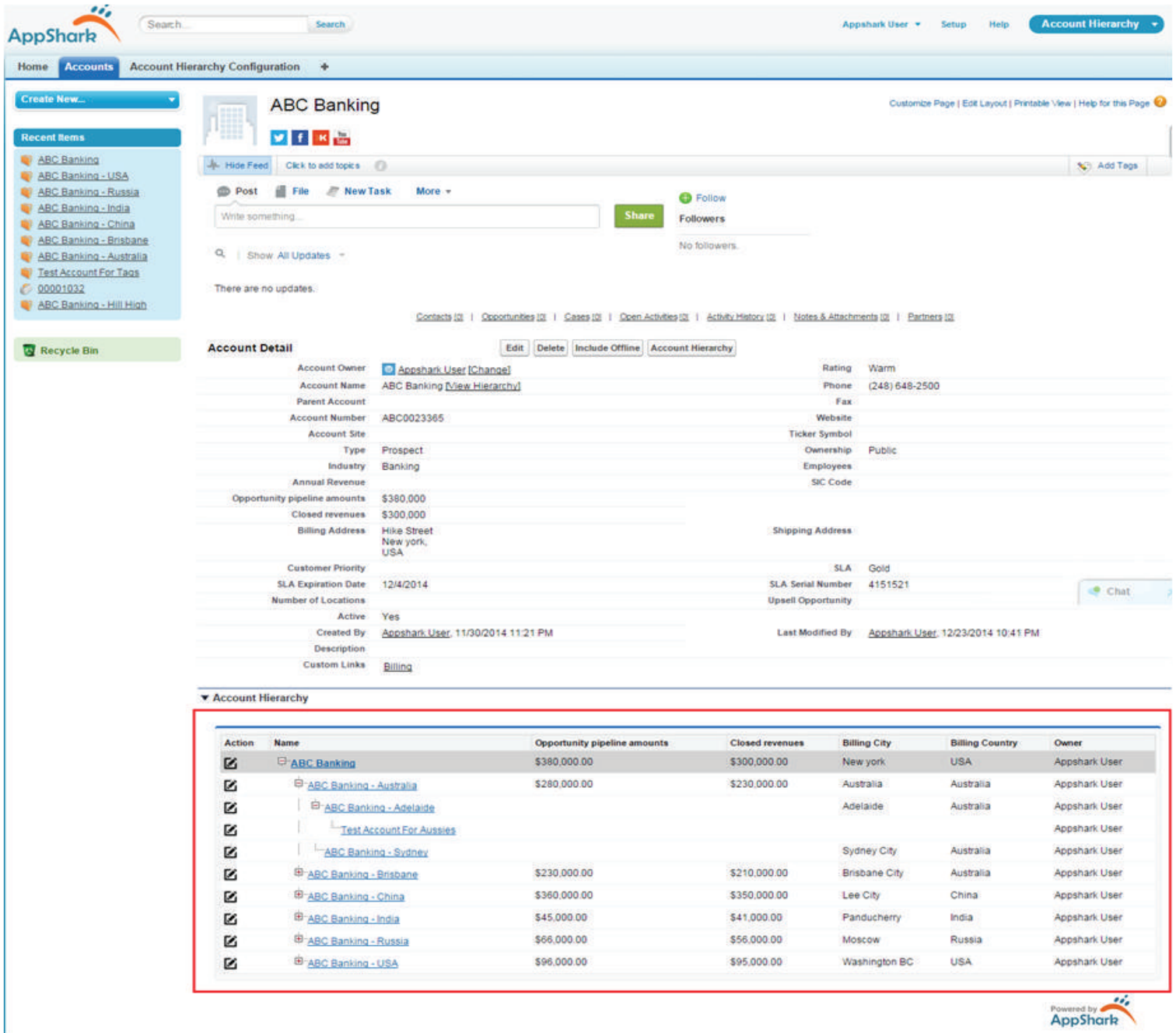


The screenshot shows a Visualforce page editor with a 'Visualforce Page Properties' dialog box open. The dialog box has the following fields and options:

- Width (in pixels or %): 100%
- Height (in pixels): 600
- Show scrollbars: ☒
- Show label: ☐

Annotations with red arrows point to the Width and Height fields, stating: "The Width and height should be 100% and 600." Another annotation points to the 'Show scrollbars' checkbox, stating: "The scroll bar should be checked." The background shows the 'Account Hierarchy' section of the page.

This is the Inline VF page which is shown after adding the inline VF page section to the page layout.



The screenshot shows the AppShark interface with the 'Account Hierarchy Configuration' page for 'ABC Banking'. The page includes a sidebar with 'Recent Items' and a main content area with 'Account Detail' and 'Account Hierarchy' sections.

Account Detail

Account Owner	Appshark User [Change]	Rating	Warm
Account Name	ABC Banking [View Hierarchy]	Phone	(248) 648-2500
Parent Account		Fax	
Account Number	ABC0023365	Website	
Account Site		Ticker Symbol	
Type	Prospect	Ownership	Public
Industry	Banking	Employees	
Annual Revenue		SIC Code	
Opportunity pipeline amounts	\$380,000		
Closed revenues	\$300,000		
Billing Address	Hike Street New York, USA	Shipping Address	
Customer Priority		SLA	Gold
SLA Expiration Date	12/4/2014	SLA Serial Number	4151521
Number of Locations		Upsell Opportunity	
Active	Yes		
Created By	Appshark User 11/30/2014 11:21 PM	Last Modified By	Appshark User 12/23/2014 10:41 PM
Description			
Custom Links	Billing		

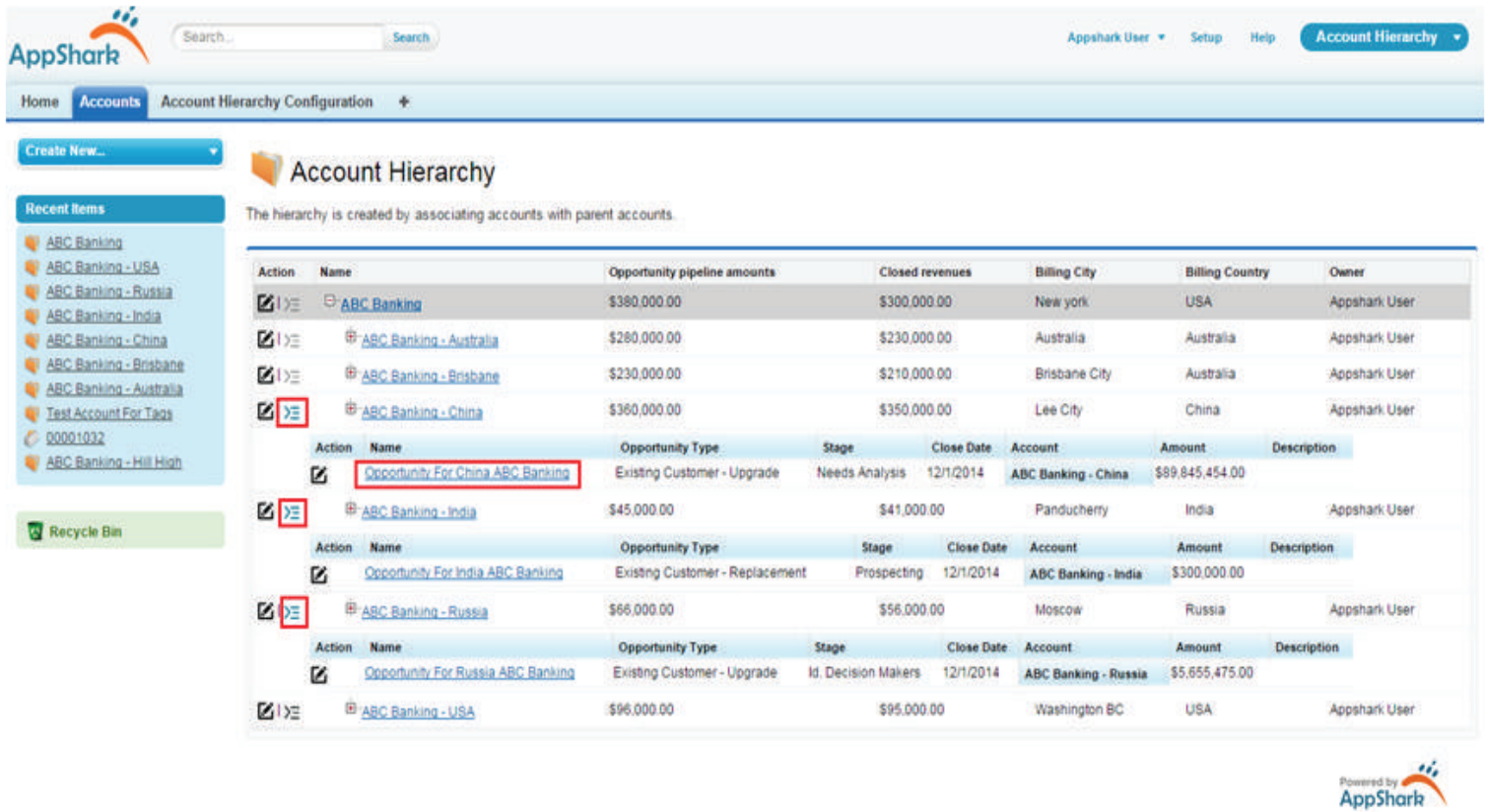
Account Hierarchy

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	\$98,000.00	\$95,000.00	Washington BC	USA	Appshark User

These are the ways in which the user can see the account hierarchy page both inline and also by click on the custom Account Hierarchy button.

The user can see unlimited accounts in the hierarchy (up to 1000 records can be displayed). The user can also view and display child records (Ex: - Contacts, Case, Opportunity) under each associated Account in the hierarchy.

If the account has a contact / case / opportunity, their respective highlighted buttons will be enabled as shown in screen shot below.



Account Hierarchy

The hierarchy is created by associating accounts with parent accounts.

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 - 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
☒ >=	Opportunity For China ABC Banking	Existing Customer - Upgrade	Needs Analysis	12/1/2014	ABC Banking - China	\$89,845,454.00
☒ >=	ABC Banking - India	\$45,000.00	\$41,000.00	Panducherry	India	Appshark User
☒ >=	Opportunity For India ABC Banking	Existing Customer - Replacement	Prospecting	12/1/2014	ABC Banking - India	\$300,000.00
☒ >=	ABC Banking - Russia	\$66,000.00	\$56,000.00	Moscow	Russia	Appshark User
☒ >=	Opportunity For Russia ABC Banking	Existing Customer - Upgrade	Id. Decision Makers	12/1/2014	ABC Banking - Russia	\$5,655,475.00
☒ >=	ABC Banking - USA	\$96,000.00	\$95,000.00	Washington BC	USA	Appshark User

The screenshot above shows opportunity – this and others can be configured using the Account hierarchy settings tab.

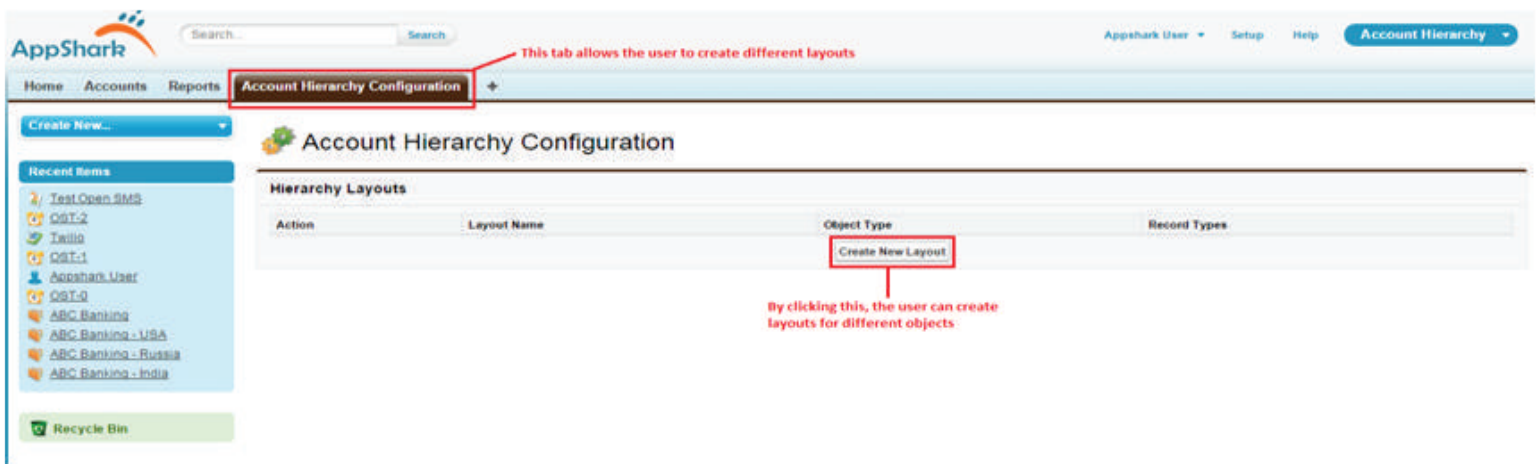
If the account has Contacts, Cases, Opportunities, the icon will be enabled.

As of now the user only has permission to view any one record at a time, based on the different types of child records under that account.

Configuring Account Hierarchy Layout settings – customizing/editing the columns:-

Click on the Account hierarchy Settings tab (as shown below) to configure the column settings.

The user will be redirected to a separate page where he/she will have to specify the required columns that will be reflected on the Account Hierarchy VF page both inline and also on the account hierarchy page (this page is displayed when the user clicks the Account Hierarchy custom button from the main account).

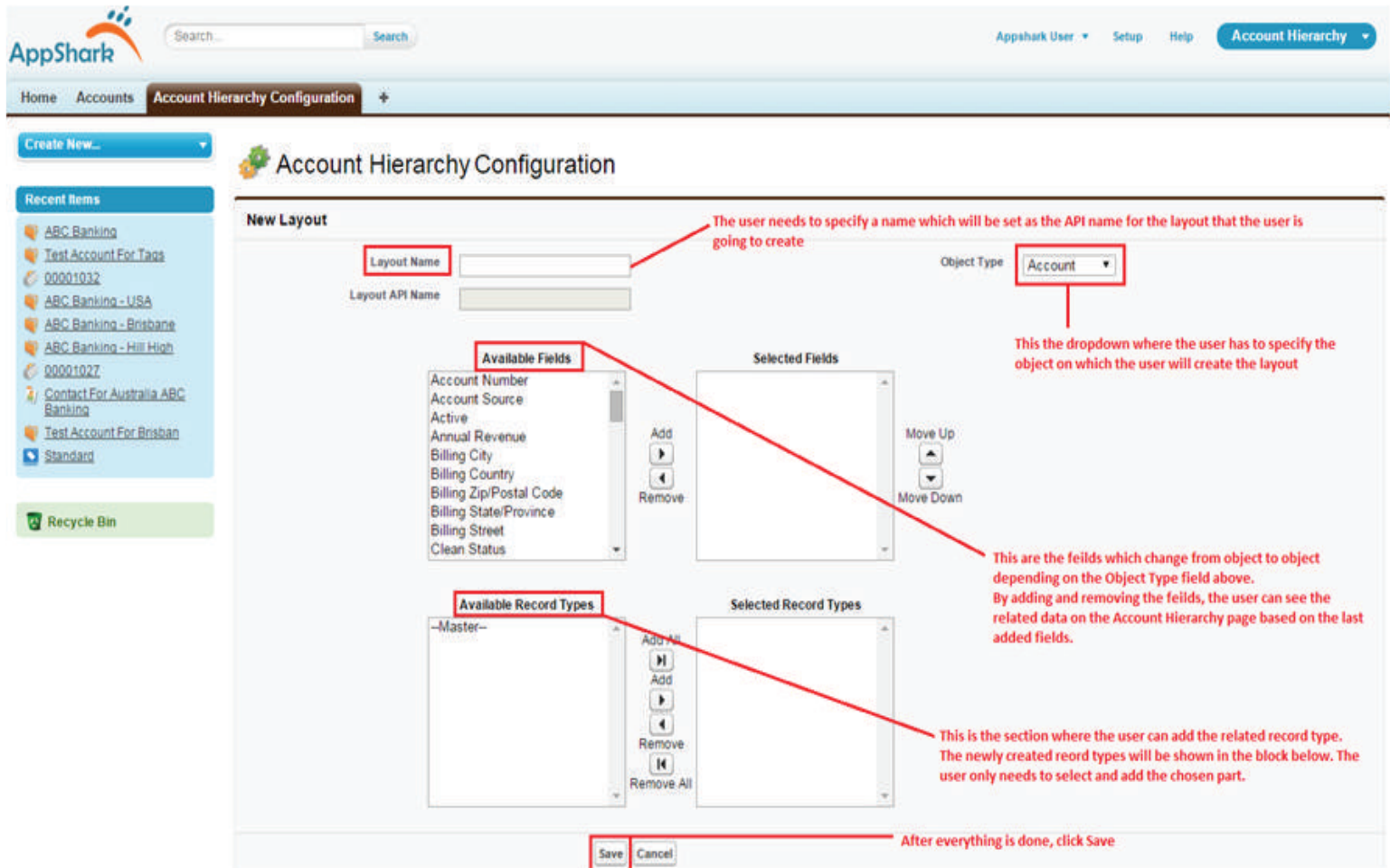


The screenshot shows the AppShark interface. The top navigation bar includes 'Home', 'Accounts', 'Reports', and 'Account Hierarchy Configuration'. The 'Account Hierarchy Configuration' tab is selected. On the left, there is a 'Recent Items' list. The main content area is titled 'Account Hierarchy Configuration' and contains a table with the following columns: 'Action', 'Layout Name', 'Object Type', and 'Record Types'. In the 'Object Type' column, there is a button labeled 'Create New Layout'. A red box highlights this button, and a red arrow points to it with the text: 'By clicking this, the user can create layouts for different objects'.

Click on “Create New Layout” button for creating a new layout for different child records and under the main account.

The user is redirected to the page where the column settings can be configured for different child records (i.e., Contacts, Cases, and Opportunities) along with a specific parent record (i.e., Account).

This is the configuration page.



The screenshot shows the 'Account Hierarchy Configuration' page in the AppShark application. The page has a sidebar with 'Recent Items' and a main content area titled 'New Layout'. The 'New Layout' section contains several fields and lists:

- Layout Name:** A text input field. Annotation: "The user needs to specify a name which will be set as the API name for the layout that the user is going to create".
- Layout API Name:** A text input field.
- Object Type:** A dropdown menu currently set to 'Account'. Annotation: "This the dropdown where the user has to specify the object on which the user will create the layout".
- Available Fields:** A list of fields including Account Number, Account Source, Active, Annual Revenue, Billing City, Billing Country, Billing Zip/Postal Code, Billing State/Province, Billing Street, and Clean Status. Annotation: "This are the feilds which change from object to object depending on the Object Type field above. By adding and removing the feilds, the user can see the related data on the Account Hierarchy page based on the last added fields.".
- Selected Fields:** An empty list for fields added to the layout. Includes 'Add' and 'Remove' buttons.
- Available Record Types:** A list with '-Master-' and other record types. Annotation: "This is the section where the user can add the related record type. The newly created reord types will be shown in the block below. The user only needs to select and add the chosen part.".
- Selected Record Types:** An empty list for record types added to the layout. Includes 'Add All', 'Add', 'Remove', and 'Remove All' buttons.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom. Annotation: "After everything is done, click Save".

Layout Name: - Initially the user should specify a Layout Name.

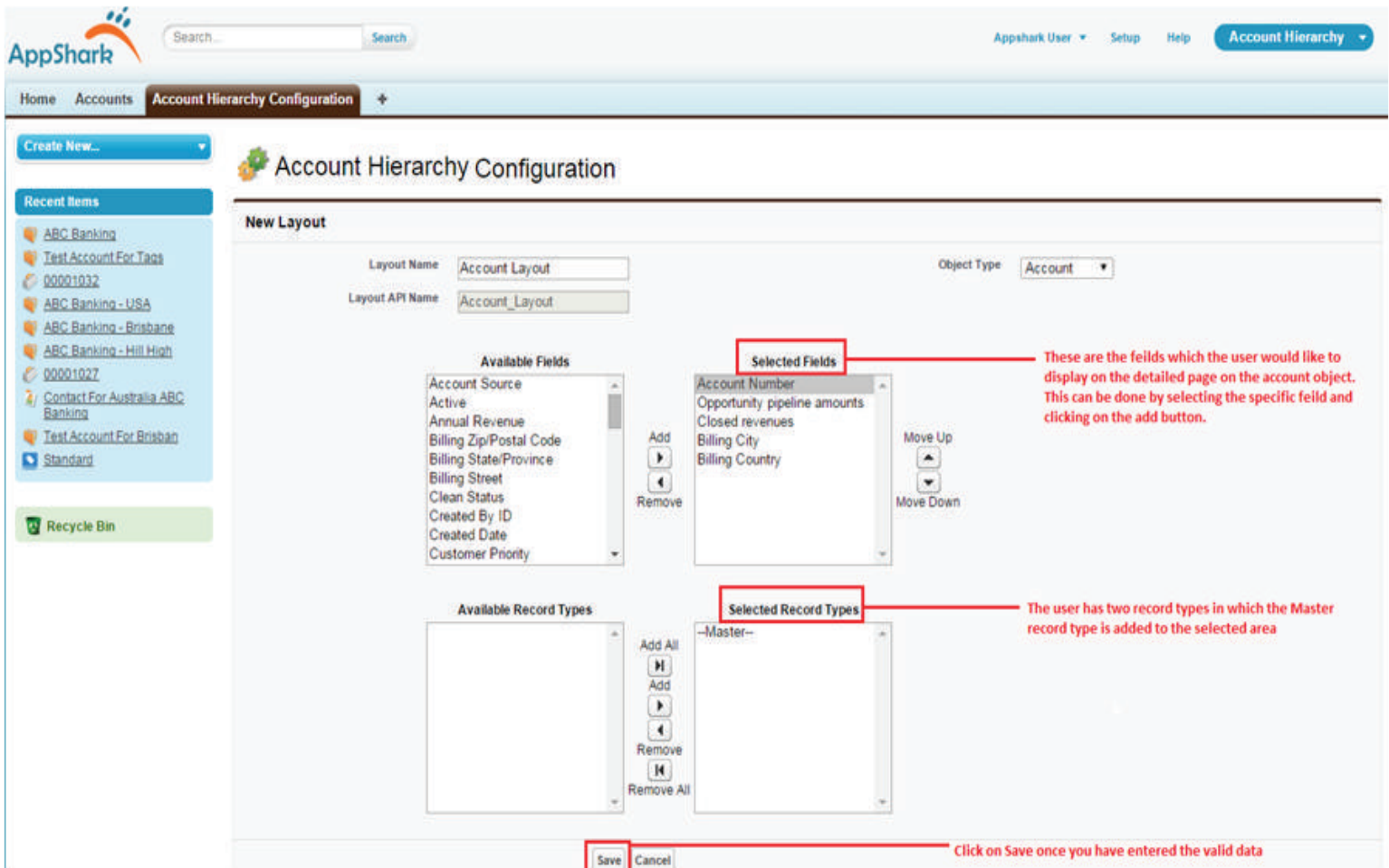
Layout API Name: - As soon as the user specifies the Layout Name the API Name will be taken by default.

Object Type: - The user will be given the option to select - Account or Contact or Cases or Opportunities.

Available fields: -These will change based on the object selected by the user in the object type

Available Record Types: - The record types will be populated based on the availability of record types on that object level. The properties for the selected record type will be added to the layout settings.

After entering the necessary data, click on SAVE



Account Hierarchy Configuration

New Layout

Layout Name: Object Type:

Layout API Name:

Available Fields

- Account Source
- Active
- Annual Revenue
- Billing Zip/Postal Code
- Billing State/Province
- Billing Street
- Clean Status
- Created By ID
- Created Date
- Customer Priority

Selected Fields

- Account Number
- Opportunity pipeline amounts
- Closed revenues
- Billing City
- Billing Country

Available Record Types

Selected Record Types

- Master-

Save **Cancel**

These are the feilds which the user would like to display on the detailed page on the account object. This can be done by selecting the specific feild and clicking on the add button.

The user has two record types in which the Master record type is added to the selected area

Click on Save once you have entered the valid data

The screen shot below shows the Account hierarchy page before configuring the column settings.



Appshark User Setup Help
Account Hierarchy

Home
Accounts
Account Hierarchy Configuration

Create New...

Recent Items

- ABC Banking
- ABC Banking - USA
- ABC Banking - Russia
- ABC Banking - India
- ABC Banking - China
- ABC Banking - Brisbane
- ABC Banking - Australia
- Test Account For Tags
- 00001032
- ABC Banking - Hill High

Recycle Bin

Account Hierarchy

The hierarchy is created by associating accounts with parent accounts.

Action	Name	This is the only field which will be shown by default if the user does not create any page layout using the Account Hierarchy Configuration settings tab
☒	ABC Banking	
☒	ABC Banking - Australia	
☒	ABC Banking - Adelaide	
☒	Test Account For Aussies	
☒	ABC Banking - Sydney	
☒	ABC Banking - Brisbane	
☒	Test Account For Brisban	
☒	ABC Banking - China	
☒	ABC Banking - Chi Chayi	
☒	ABC Banking - Hill High	
☒	ABC Banking - India	
☒	ABC Banking - Chennai	
☒	ABC Banking - Delhi	
☒	ABC Banking - Hyderabad	
☒	ABC Banking - Mumbai	
☒	ABC Banking - Russia	
☒	ABC Banking - USA	

The screen shot below shows the Account hierarchy page after configuring the column settings.



Appshark User ▾
Setup
Help
Account Hierarchy ▾

Home
Accounts
Account Hierarchy Configuration

Create New... ▾

Recent Items

- ABC Banking
- ABC Banking - USA
- ABC Banking - Russia
- ABC Banking - India
- ABC Banking - China
- ABC Banking - Brisbane
- ABC Banking - Australia
- Test Account For Tags
- 00001032
- ABC Banking - Hill High

Recycle Bin



ABC Banking

Hide Feed
Click to add topics

Post
File
New Task
More ▾

Write something...

Follow
Followers
No followers.

Show All Updates ▾

There are no updates.

Customize Page | Edit Layout | Printable View | Help for this Page

Add Tags

Contacts (2) | Opportunities (2) | Cases (2) | Open Activities (2) | Activity History (2) | Notes & Attachments (2) | Partners (2)

Account Detail

Edit
Delete
Include Offline
Account Hierarchy

Account Owner
Appshark User (Change)

Account Name
ABC Banking (View Hierarchy)

Parent Account

Account Number
ABC0023365

Account Site

Type
Prospect

Industry
Banking

Annual Revenue

Opportunity pipeline amounts
\$380,000

Closed revenues
\$300,000

Billing Address
Hike Street
New york,
USA

Customer Priority

SLA Expiration Date
12/4/2014

Number of Locations

Active
Yes

Created By
Appshark User, 11/30/2014 11:21 PM

Description

Custom Links
Billing

Rating
Warm

Phone
(248) 648-2500

Fax

Website

Ticker Symbol

Ownership
Public

Employees

SIC Code

Shipping Address

SLA
Gold

SLA Serial Number
4151521

Upsell Opportunity

Last Modified By
Appshark User, 12/23/2014 10:41 PM

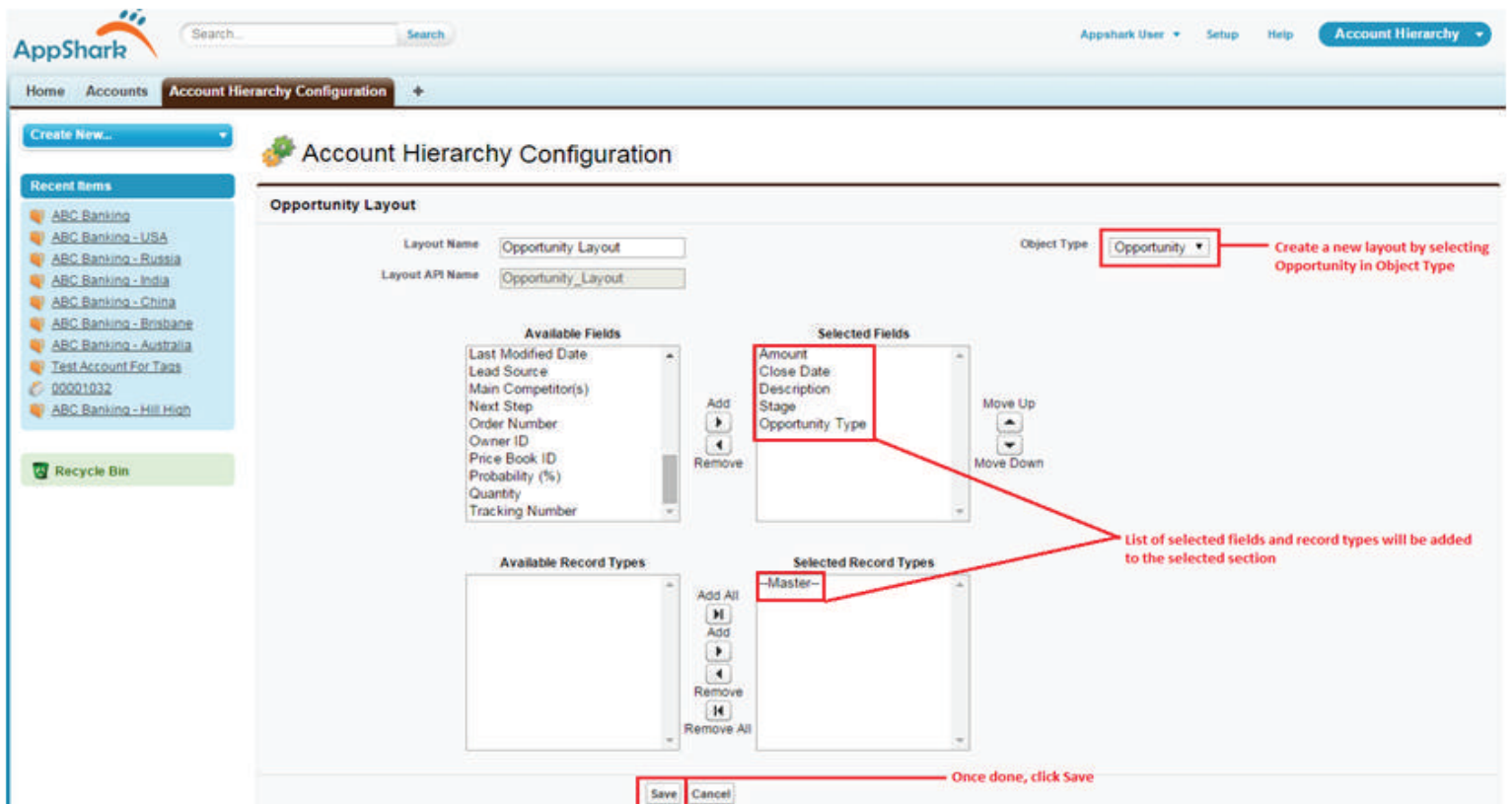
Chat

Account Hierarchy

These are all the fields added to the page layout which are displayed on the inline VF page

Action	Name	Account Number	Opportunity pipeline amounts	Closed revenues	Billing City	Billing Country
☒	ABC Banking	ABC0023365	\$380,000.00	\$300,000.00	New york	USA
☒	ABC Banking - Australia	ABC00556699	\$280,000.00	\$230,000.00	Australia	Australia
☒	ABC Banking - Adelaide	ABC0026698AD			Adelaide	Australia
☒	Test Account For Aussies					
☒	ABC Banking - Sydney	ABC00998SYD			Sydney City	Australia
☒	ABC Banking - Brisbane	ABC099658BR	\$230,000.00	\$210,000.00	Brisbane City	Australia
☒	ABC Banking - China	ABC00669558	\$360,000.00	\$350,000.00	Lee City	China
☒	ABC Banking - India	ABC0089568	\$45,000.00	\$41,000.00	Panducherry	India
☒	ABC Banking - Russia	ABC0336565	\$66,000.00	\$56,000.00	Moscow	Russia
☒	ABC Banking - USA	ABC0026636	\$96,000.00	\$95,000.00	Washington BC	USA

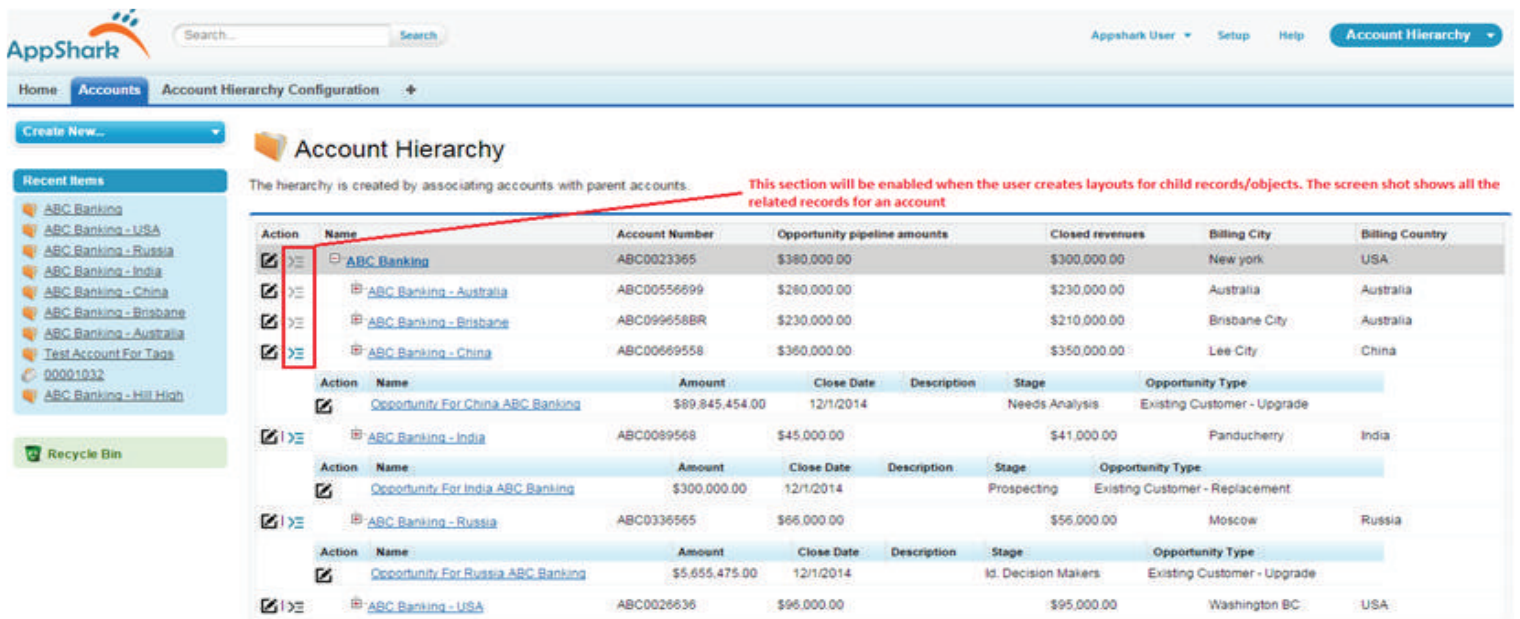
This is how the user has to create a layout for a child record. For example, select Opportunity in Object type



The screenshot shows the 'Account Hierarchy Configuration' page. On the left, there's a 'Recent Items' list with various account names like 'ABC Banking - USA', 'ABC Banking - Russia', etc. The main area is titled 'Opportunity Layout'. It has fields for 'Layout Name' (Opportunity Layout) and 'Layout API Name' (Opportunity_Layout). The 'Object Type' dropdown is set to 'Opportunity'. Below this, there are two columns: 'Available Fields' and 'Selected Fields'. The 'Selected Fields' column contains 'Amount', 'Close Date', 'Description', 'Stage', and 'Opportunity Type'. To the right of these columns are 'Move Up' and 'Move Down' buttons. Below the fields, there are 'Available Record Types' and 'Selected Record Types' sections. The 'Selected Record Types' section contains '-Master-'. At the bottom, there are 'Save' and 'Cancel' buttons. Red annotations highlight the 'Opportunity' selection in the Object Type dropdown, the 'Selected Fields' list, the 'Selected Record Types' list, and the 'Save' button.

Layout Name: Opportunity Layout
Layout API Name: Opportunity_Layout
Object Type: Opportunity
Available Fields: Last Modified Date, Lead Source, Main Competitor(s), Next Step, Order Number, Owner ID, Price Book ID, Probability (%), Quantity, Tracking Number
Selected Fields: Amount, Close Date, Description, Stage, Opportunity Type
Available Record Types: [Empty]
Selected Record Types: -Master-
Buttons: Add, Remove, Move Up, Move Down, Add All, Add, Remove, Remove All
Save, Cancel

After creating the layout for the record, the user will notice a new action item that will allow him/her to view any and all child records associated with a parent.



The screenshot shows the 'Account Hierarchy' page. It displays a list of accounts and their associated opportunities. The table has columns for Action, Name, Account Number, Opportunity pipeline amounts, Closed revenues, Billing City, and Billing Country. The accounts listed are ABC Banking, ABC Banking - Australia, ABC Banking - Brisbane, ABC Banking - China, ABC Banking - India, ABC Banking - Russia, and ABC Banking - USA. Each account has a corresponding opportunity record. Red annotations highlight the 'ABC Banking' account and the 'Opportunity For China ABC Banking' record.

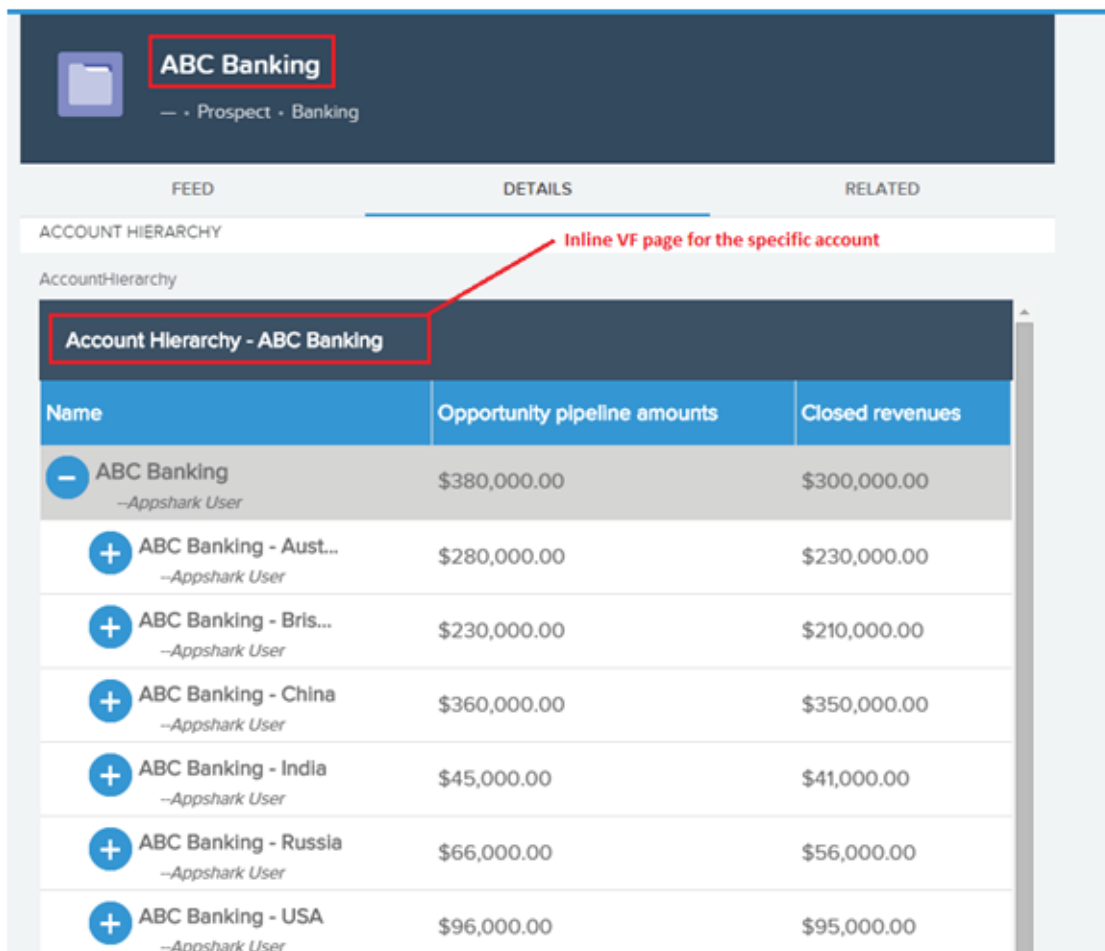
The hierarchy is created by associating accounts with parent accounts. This section will be enabled when the user creates layouts for child records/objects. The screen shot shows all the related records for an account

Action	Name	Account Number	Opportunity pipeline amounts	Closed revenues	Billing City	Billing Country
☒	ABC Banking	ABC0023365	\$380,000.00	\$300,000.00	New york	USA
☒	ABC Banking - Australia	ABC00556699	\$280,000.00	\$230,000.00	Australia	Australia
☒	ABC Banking - Brisbane	ABC099658BR	\$230,000.00	\$210,000.00	Brisbane City	Australia
☒	ABC Banking - China	ABC00669558	\$360,000.00	\$350,000.00	Lee City	China
☒	ABC Banking - India	ABC0089568	\$45,000.00	\$41,000.00	Panducherry	India
☒	ABC Banking - Russia	ABC0336565	\$66,000.00	\$56,000.00	Moscow	Russia
☒	ABC Banking - USA	ABC0026636	\$96,000.00	\$95,000.00	Washington BC	USA

Account Hierarchy in Salesforce1:-

Once the user logs into the salesforce1 application as gives the valid credentials, he/she can go to the account view page and click on any account to view the inline VF page which is added to the layout.

If the user clicks anywhere on the Inline VF page he/she will be redirected to the main account hierarchy page where all the hierarchies are shown in greater detail.



ABC Banking

— Prospect > Banking

FEED DETAILS RELATED

ACCOUNT HIERARCHY

AccountHierarchy

Account Hierarchy - ABC Banking

Inline VF page for the specific account

Name	Opportunity pipeline amounts	Closed revenues
ABC Banking --Appshark User	\$380,000.00	\$300,000.00
+ ABC Banking - Aust... --Appshark User	\$280,000.00	\$230,000.00
+ ABC Banking - Bris... --Appshark User	\$230,000.00	\$210,000.00
+ ABC Banking - China --Appshark User	\$360,000.00	\$350,000.00
+ ABC Banking - India --Appshark User	\$45,000.00	\$41,000.00
+ ABC Banking - Russia --Appshark User	\$66,000.00	\$56,000.00
+ ABC Banking - USA --Appshark User	\$96,000.00	\$95,000.00

The highlighted Account owner will be displayed only if it is added to the account layout.

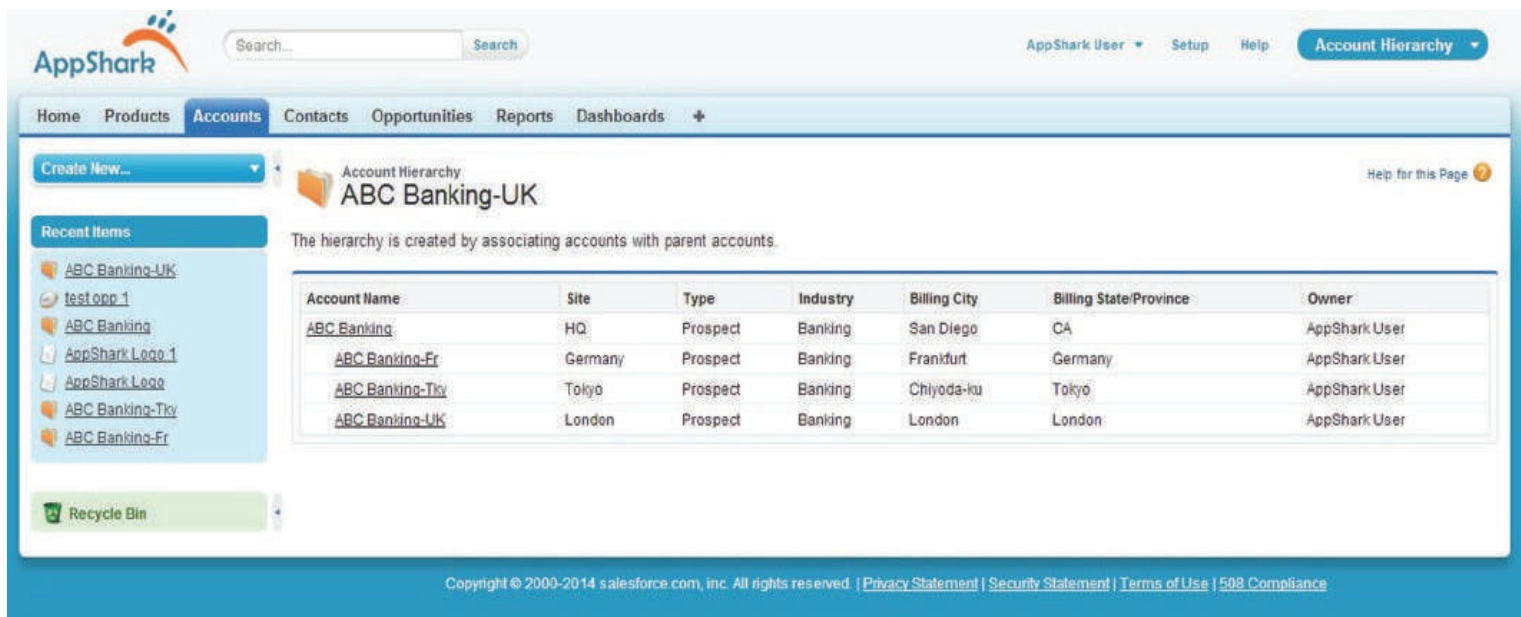
The Account Owner will be displayed as a column only when there are less than three fields added to a layout and the Account owner is included in that list.

Account Hierarchy - ABC Banking		
Name	Opportunity pipeline amounts	Closed revenues
ABC Banking ~Appshark User	\$380,000.00	\$300,000.00
ABC Banking - Aust... ~Appshark User Account Owner	\$280,000.00	\$230,000.00
ABC Banking - Bris... ~Appshark User	\$230,000.00	\$210,000.00
ABC Banking - China ~Appshark User	\$360,000.00	\$350,000.00
ABC Banking - India ~Appshark User	\$45,000.00	\$41,000.00
ABC Banking - Russia ~Appshark User	\$66,000.00	\$56,000.00
ABC Banking - USA ~Appshark User	\$96,000.00	\$95,000.00

At the moment, we are not displaying any child records in Salesforce1. The user can see the entire account hierarchy tree from the main parent account.

Limitations of the Standard Account Hierarchy package:

- The Standard Account Hierarchy displays only the first 500 accounts. Additional accounts are not displayed.
- The Standard 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



AppShark

Search... Search

AppShark User Setup Help Account Hierarchy

Home Products Accounts Contacts Opportunities Reports Dashboards +

Create New...

Recent Items

- ABC Banking-UK
- test opp 1
- ABC Banking
- AppShark Logo 1
- AppShark Logo
- ABC Banking-Tky
- ABC Banking-Fr

Recycle Bin

Account Hierarchy
ABC Banking-UK

The hierarchy is created by associating accounts with parent accounts.

Account Name	Site	Type	Industry	Billing City	Billing State/Province	Owner
ABC Banking	HQ	Prospect	Banking	San Diego	CA	AppShark User
ABC Banking-Fr	Germany	Prospect	Banking	Frankfurt	Germany	AppShark User
ABC Banking-Tky	Tokyo	Prospect	Banking	Chiyoda-ku	Tokyo	AppShark User
ABC Banking-UK	London	Prospect	Banking	London	London	AppShark User

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Benefits of AppShark's Account Hierarchy package:

With AppShark's customized Account Hierarchy package, 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)
- See Record type based Hierarchy View
- See the hierarchy both inline and on a separate page
- See the selected account which is highlighted in the hierarchy
- Display more than 1000 records in the Hierarchy view
- Expand and Collapse the Records in Hierarchy view
- 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

Create New... ▾

Recent Items

-  [ABC Banking](#)
-  [ABC Banking - USA](#)
-  [ABC Banking - Russia](#)
-  [ABC Banking - India](#)
-  [ABC Banking - China](#)
-  [ABC Banking - Brisbane](#)
-  [ABC Banking - Australia](#)
-  [Test Account For Tags](#)
-  [00001032](#)
-  [ABC Banking - Hill High](#)

 Recycle Bin

 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	ABC0023365	\$380,000.00	\$300,000.00	New york	USA														
☒ ≡	 ABC Banking - Australia	ABC00556699	\$280,000.00	\$230,000.00	Australia	Australia														
☒ ≡	 ABC Banking - Brisbane	ABC099658BR	\$230,000.00	\$210,000.00	Brisbane City	Australia														
☒ ≡	 ABC Banking - China	ABC00669558	\$360,000.00	\$350,000.00	Lee City	China														
<table> <tr> <th>Action</th><th>Name</th><th>Amount</th><th>Close Date</th><th>Description</th><th>Stage</th><th>Opportunity Type</th></tr> <tr> <td>☒</td><td>Opportunity For China ABC Banking</td><td>\$89,845,454.00</td><td>12/1/2014</td><td></td><td>Needs Analysis</td><td>Existing Customer - Upgrade</td></tr> </table>							Action	Name	Amount	Close Date	Description	Stage	Opportunity Type	☒	Opportunity For China ABC Banking	\$89,845,454.00	12/1/2014		Needs Analysis	Existing Customer - Upgrade
Action	Name	Amount	Close Date	Description	Stage	Opportunity Type														
☒	Opportunity For China ABC Banking	\$89,845,454.00	12/1/2014		Needs Analysis	Existing Customer - Upgrade														
☒ ≡	 ABC Banking - India	ABC0089568	\$45,000.00		\$41,000.00	Panducherry India														
<table> <tr> <th>Action</th><th>Name</th><th>Amount</th><th>Close Date</th><th>Description</th><th>Stage</th><th>Opportunity Type</th></tr> <tr> <td>☒</td><td>Opportunity For India ABC Banking</td><td>\$300,000.00</td><td>12/1/2014</td><td></td><td>Prospecting</td><td>Existing Customer - Replacement</td></tr> </table>							Action	Name	Amount	Close Date	Description	Stage	Opportunity Type	☒	Opportunity For India ABC Banking	\$300,000.00	12/1/2014		Prospecting	Existing Customer - Replacement
Action	Name	Amount	Close Date	Description	Stage	Opportunity Type														
☒	Opportunity For India ABC Banking	\$300,000.00	12/1/2014		Prospecting	Existing Customer - Replacement														
☒ ≡	 ABC Banking - Russia	ABC0336565	\$66,000.00		\$56,000.00	Moscow Russia														
<table> <tr> <th>Action</th><th>Name</th><th>Amount</th><th>Close Date</th><th>Description</th><th>Stage</th><th>Opportunity Type</th></tr> <tr> <td>☒</td><td>Opportunity For Russia ABC Banking</td><td>\$5,655,475.00</td><td>12/1/2014</td><td></td><td>Id. Decision Makers</td><td>Existing Customer - Upgrade</td></tr> </table>							Action	Name	Amount	Close Date	Description	Stage	Opportunity Type	☒	Opportunity For Russia ABC Banking	\$5,655,475.00	12/1/2014		Id. Decision Makers	Existing Customer - Upgrade
Action	Name	Amount	Close Date	Description	Stage	Opportunity Type														
☒	Opportunity For Russia ABC Banking	\$5,655,475.00	12/1/2014		Id. Decision Makers	Existing Customer - Upgrade														
☒ ≡	 ABC Banking - USA	ABC0026636	\$96,000.00		\$95,000.00	Washington BC USA														