



iTools Customizable Account Hierarchy

Comprehensive, Customized Account View

 **Lightning Ready**

Product Highlights

Create a comprehensive global view of an account and its subsidiaries with information that best meets your needs.

- Customizable tabs for aggregated views of related Contact, Opportunity, Task, Event, Case, and other object information.
- Customizable tab filters and list views for accounts and related objects.
- Powerful Dynamic filter fields allow your users to dynamically enter field filter criteria.
- Print and Export from each tab.
- Easily Manage Account Relationships
- Clicks, not code – iTools Settings tab provides simple point and click configuration.

Account Hierarchy
United Oil & Gas Corp.

Accounts | Contacts | Opportunities | Tasks | Events | Cases | Contracts | Former Employees | Assets | Opportunity Scoreboard | Contract Contact Roles

Go To  | Edit My Display Settings | Build Hierarchy | Export | Printable View

Account Name	Type	City	Employees	# Locations	Total All Opp Amt	Owner
United Oil & Gas Corp.	Customer - Direct	Chicago	145,000	955	\$295,000.00	Adam Adams
UO&G Financial Services	Prospect	New York	2,300	1	\$340,000.00	Bob Roberts
United Oil & Gas UK	Customer - Channel	London	24,000	34	\$270,000.00	Adam Adams
United Oil & Gas South America	Customer - Channel	São Paulo	17,500	36	\$670,000.00	Adam Adams
UO&G, Venezuela	Customer - Channel	Caracas	18,300	29	\$440,000.00	Adam Adams
UO&G, Brazil	Customer - Channel	Brasilia	11,050	16	\$260,000.00	Adam Adams
UO&G, Argentina	Prospect	Buenos Aires	35,250	47	\$370,000.00	Adam Adams
United Oil & Gas Singapore	Customer - Direct		3,000	6	\$180,000.00	Adam Adams
United Oil & Gas Exploration Services	Prospect	Houston	6,000	3	\$250,000.00	Adam Adams
UO&G Drilling Institute	Prospect	Chicago	150	1	\$350,000.00	Bob Roberts
UO&G Drilling Equipment	Prospect	New York	30,000	12	\$0.00	Adam Adams
UO&G DE South America	Prospect	Rio de Janeiro	2,500	7	\$235,000.00	Adam Adams
UO&G DE North America	Prospect	Denver	13,000	9	\$645,000.00	Adam Adams
UO&G DE Europe	Customer - Channel	London	6,000	5	\$415,000.00	Adam Adams
UO&G DE Asia	Prospect	Chicago	8,500	4	\$270,000.00	Adam Adams

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Additional Capabilities

- Account Explorer - Search, filter and view multiple accounts and their associated account hierarchy information all from a single, fully customizable page.
- Org Chart View – View Reporting Relationships among contacts for strategic sales and account planning.
- Account Hierarchy Builder- use simple search and point/click actions to add, move and remove accounts from a hierarchy, all from a single page.
- Fifteen tabs to configure as you please with related standard and custom object information.
- Endless extensibility possibilities when you integrate your own custom or 3rd party Visual force pages with the iTools custom page tabs.
- Select and order up to 20 standard or custom fields to display as columns of information on each tab.
- Expand/Collapse levels to navigate large and deep hierarchies.
- Hierarchical and non-hierarchical views of related object information.
- 3-level data sort using clickable column headers.
- Easily create your own account family-based reports and dashboards.
- Ideal for large multi-national accounts with extremely large and deep hierarchies. No limit to the number of levels in the hierarchy. Efficiently view and page through thousands of accounts.
- Admins can customize a standard view for everyone – or let your users personalize their own view with precisely the information they need.
- Customize for all users, by profile or individual.
- One click, button access from Account Detail page.
- Display as in-line section component on Account Detail page.
- Page Level Configuration Options for even more customized integration possibilities.

Get Started Today

We offer a risk-free, no obligation 30-day trial. Get it Now.
All features, specifications, and pricing are subject to change.