



AppyWise

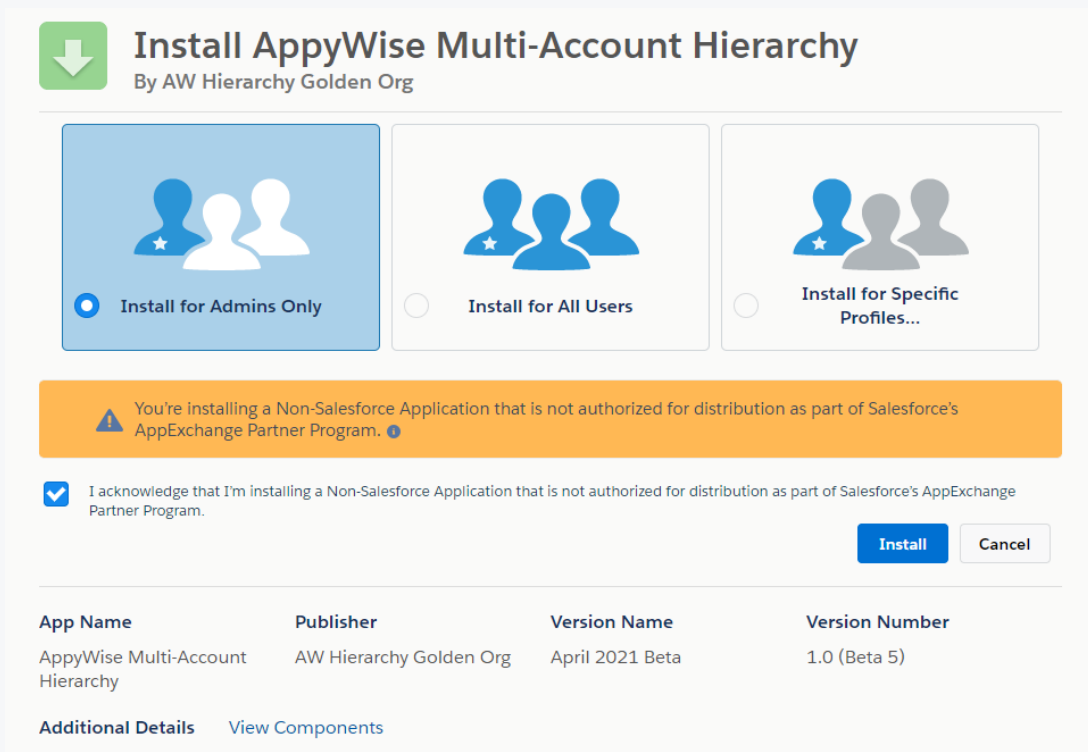
SETUP INSTRUCTIONS FOR
SYSTEM ADMINS

APPYWISE MULTI- ACCOUNT HIERARCHY

SPRING'21

Step 1: Install the managed package

- Link for Production / Developer orgs:
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5Y0000001OKIc>
- Link for Sandbox orgs:
<https://test.salesforce.com/packaging/installPackage.apexp?p0=04t5Y0000001OKIc>
- Install the package for Admins Only.



Install AppyWise Multi-Account Hierarchy
By AW Hierarchy Golden Org

☒ Install for Admins Only ☐ Install for All Users ☐ Install for Specific Profiles...

 You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

☒ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install **Cancel**

App Name	Publisher	Version Name	Version Number
AppyWise Multi-Account Hierarchy	AW Hierarchy Golden Org	April 2021 Beta	1.0 (Beta 5)

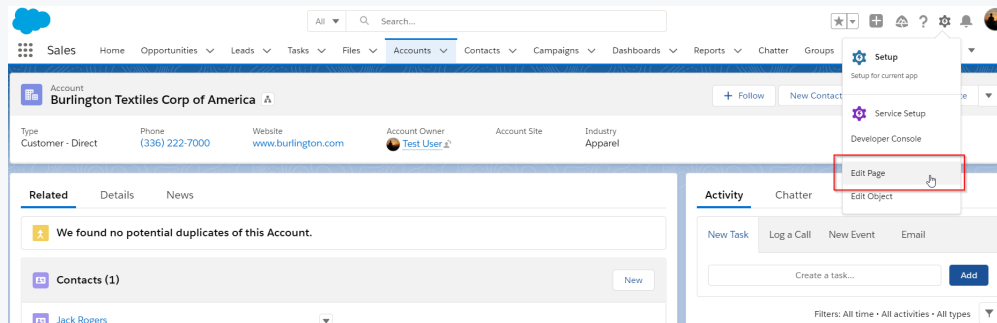
[Additional Details](#) [View Components](#)



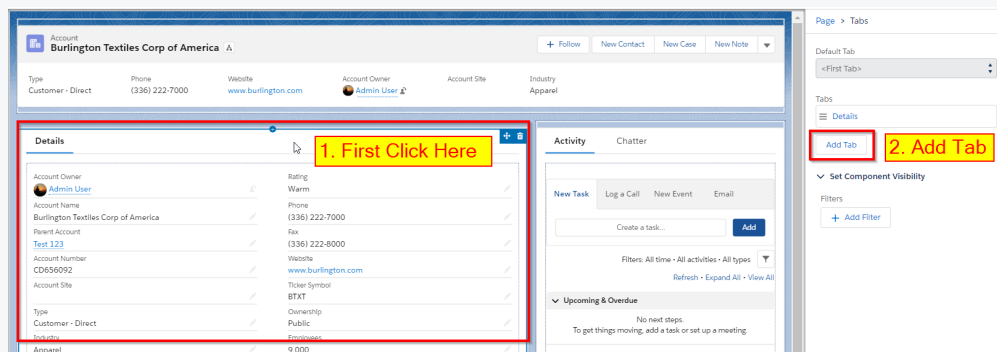
We will use **Permission Sets** to grant access to users. We will cover that in detail in Step 3.

Step 2: Create a new Tab on Account Page

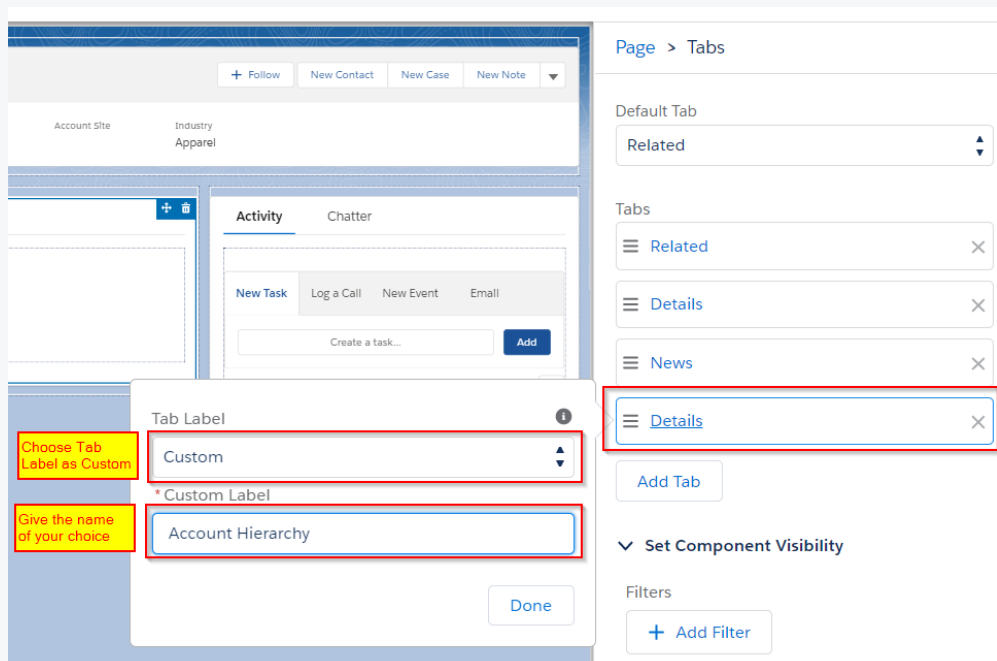
- Go to any Account record and click "Edit Page"



- Click on Page > Tabs
- Add a new Tab

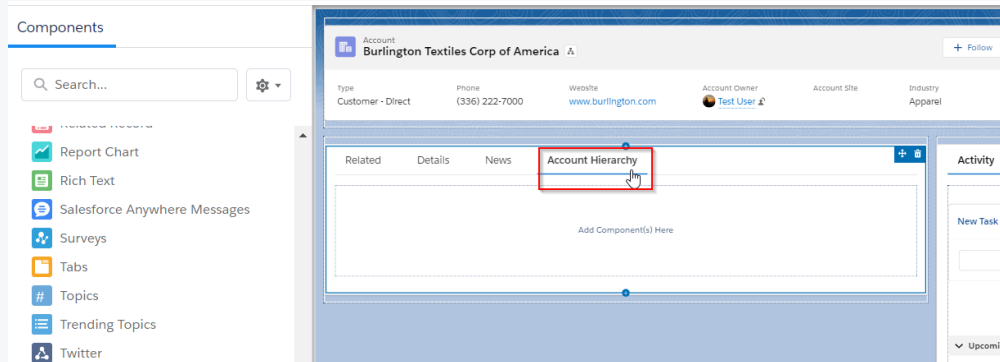


- Give your new tab a new name by choosing *Tab Label = Custom*
- Choose the name of your choice. For Eg: Account Hierarchy

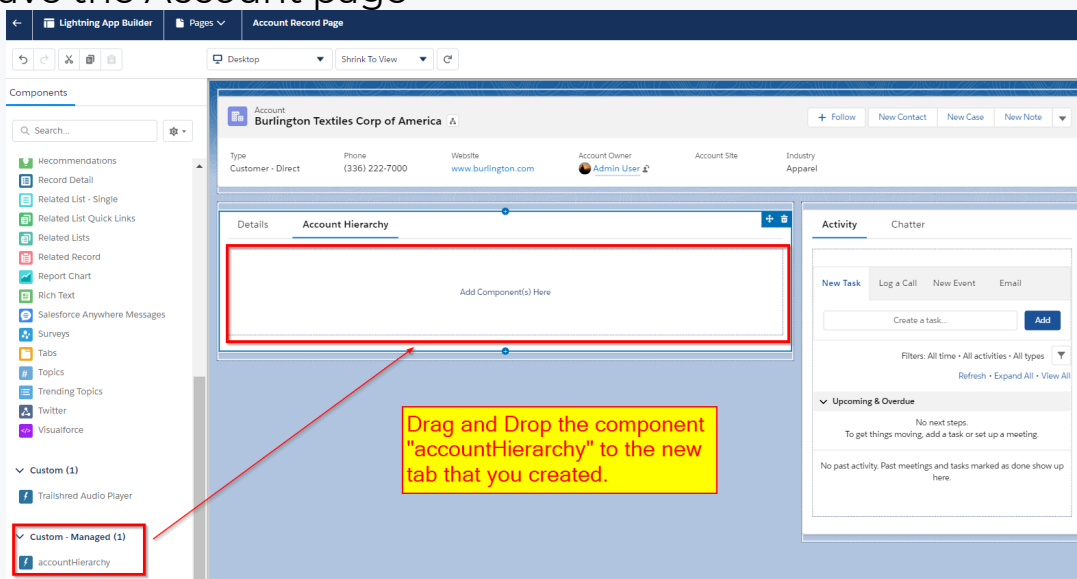


Step 3: Add the Lightning Component to the tab

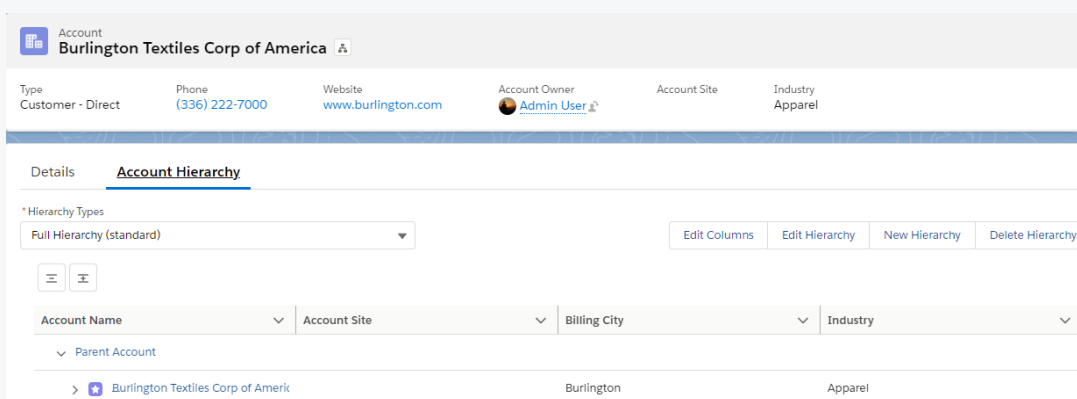
- Click on the new Tab that you just created



- Drag and Drop the lightning web component named "accountHierarchy" in this tab
- Save the Account page



- The New component will now show in the tab that you just created.



Step 4: Assign the permission sets

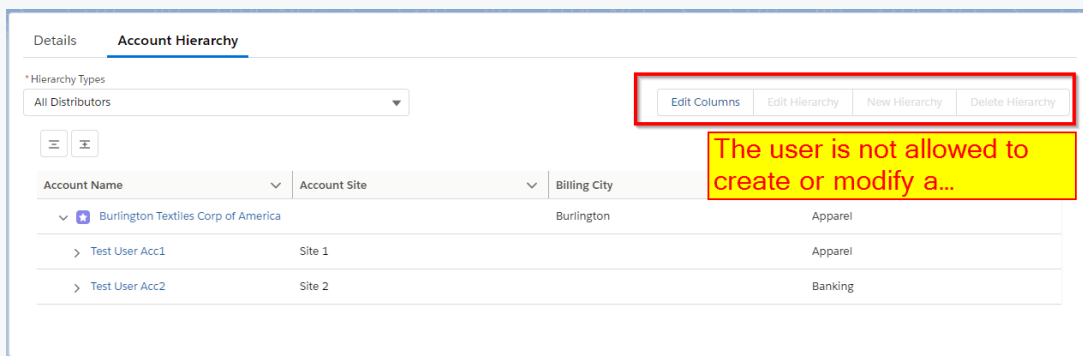


There are two permission sets available.

1. AppyWise Hierarchy User
2. AppyWise Hierarchy Manager

Unless one of the above permission sets are assigned, your end users will not see the AppyWise Account Multi-Hierarchy component.

- A user with "AppyWise Hierarchy User" permission set
 - Can view multiple hierarchies
 - Cannot edit any hierarchy - the Edit / Create / Delete buttons are grayed out.



Details **Account Hierarchy**

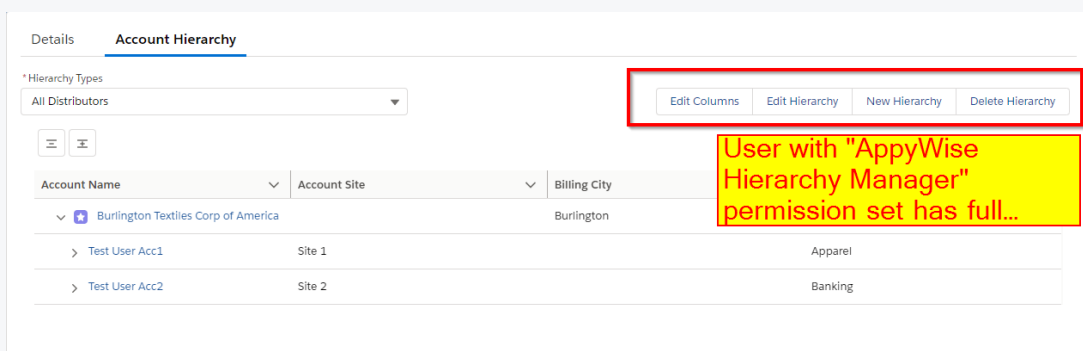
* Hierarchy Types
All Distributors

Account Name Account Site Billing City

Burlington Textiles Corp of America		Burlington	Apparel
Test User Acc1	Site 1		Apparel
Test User Acc2	Site 2		Banking

The user is not allowed to create or modify a...

- A user with "AppyWise Hierarchy Manager" has full access



Details **Account Hierarchy**

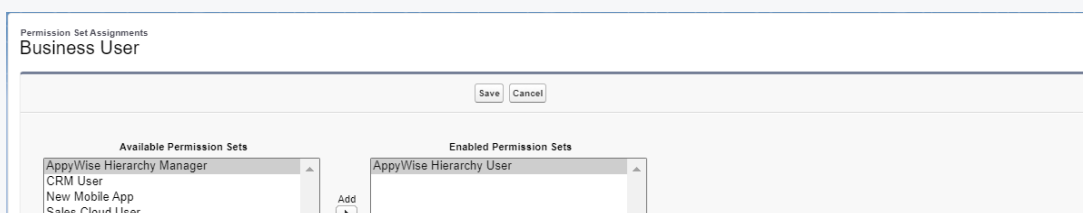
* Hierarchy Types
All Distributors

Account Name Account Site Billing City

Burlington Textiles Corp of America		Burlington	Apparel
Test User Acc1	Site 1		Apparel
Test User Acc2	Site 2		Banking

User with "AppyWise Hierarchy Manager" permission set has full...

- To assign permission set to a user, go to User -> Permission Set Assignment -> Assign



Permission Set Assignments
Business User

Save Cancel

Available Permission Sets

- AppyWise Hierarchy Manager
- CRM User
- New Mobile App
- Sales Cloud User

Add

Enabled Permission Sets

- AppyWise Hierarchy User



AppyWise

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