



AppyWise

HOW TO USE THE APP?

APPYWISE MULTI-ACCOUNT HIERARCHY

SPRING'21



Step 1: View Multiple Hierarchies

- Go to the tab named "Account Hierarchy" on Account record
- Choose from the dropdown Hierarchy Types
- NOTE: If you don't find the tab, check with your admin. Your admin may named it differently for your organization

Account Hierarchy

Step 1: Go to the Account Hierarchy Tab

Step 2: Choose the Hierarchy from the drop down

- Expand / Collapse View

Click on "Expand All" or "Collapse All" buttons for a quick view of the complete hierarchy

- Change the visible columns for the hierarchy
- Click "Edit Column" button and choose the fields you would like to show as columns.

1. Click Edit Column button

Select fields to display

Select Options (at least 2 and at most 6)

Available

Selected

Update Column Cancel



Step 2: Create a new hierarchy

- Go to the Account record
- Then go to the tab named "Account Hierarchy"
- Click "New Hierarchy"

Account
Test User Acc1

Type: Customer - Direct | Phone: | Website: | Account Owner: Test User | Account Site: Site 1 | Industry: Apparel

Related | Details | News | **Account Hierarchy**

* Hierarchy Types
Select Hierarchy Types

Edit Columns | Edit Hierarchy | **New Hierarchy** | Delete Hierarchy

Click here to create a new child hierarchy under this account.



If the Edit Hierarchy field is grayed out for you, contact your System Admin.

- Give the custom Hierarchy a name

Create new Hierarchy Type

Name
My Custom hierarchy

Save Cancel

- Click Save
- In the next steps, we will "Edit" this Hierarchy to create child nodes.



Step 3: Add child accounts to this hierarchy

- Click on the "Edit Hierarchy" button

Account
Test User Acc1

Type: Customer - Direct | Phone: | Website: | Account Owner: Test User | Account Site: Site 1 | Industry: Apparel

Related | Details | News | **Account Hierarchy**

*Hierarchy Types
My Custom hierarchy

Edit Columns | **Edit Hierarchy** | New Hierarchy | Delete Hierarchy

Click to modify an existing hierarchy

Account Name	Account Site	Billing City	Industry
> Test User Acc1	Site 1		Apparel

- Click "Search Account"

Add/Remove Accounts

Search Account

- Select the Accounts
- The selected accounts show in the canvas
- Click "+" on the parent account to add all selected accounts as child accounts
- Close the search box and click "Update Accounts" to save the hierarchy.

Search: test

Step 1: Search for accounts in the search bar

Account Name	Account Site	Billing City	Industry
☐ Test 123			Apparel
☐ Test Account pqr			
☐ Test User Acc			
☒ Test User Acc2	Site 2		Banking
☒ Test User Acc3	Site 3		Biotechnology
☒ Test User Acc4	Site 4		Chemicals
☐ Test User Acc5	Site 5		Agriculture

Step 2: Select the accounts from the results

Step 3: The selected accounts will show in the canvas

Test User Acc2 X Test User Acc3 X Test User Acc4 X

Select to Drop | Move Node | Delete Node

Step 4: Click "+" on the parent account to add these accounts as child accounts

Step 5: When you are done, close the Search box and click "Update Accounts"

Update Accounts | Cancel



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contact@appywise.com