

Administrator Guide

ACCOUNT HIERARCHY - THE GLOBAL VIEW OF THE COMPANIES, WITH THEIR RELATIONSHIPS.



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Introduction

The purpose of this document is to guide an administrator to configure the ACCOUNT HIERARCHY application step by step.

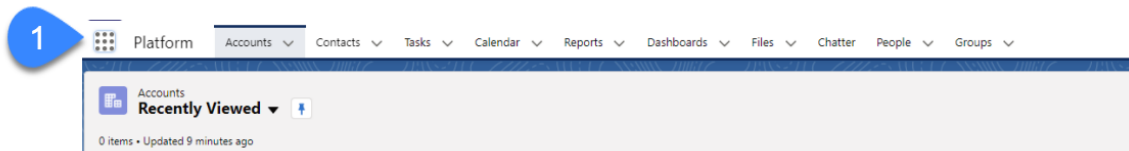
CloudExped Account Hierarchy package allows you to customize the view of account hierarchy in Salesforce to suit your specific business requirements. It provides the ability to set hierarchy fields based on Profile or User-specific fields

Application Configuration

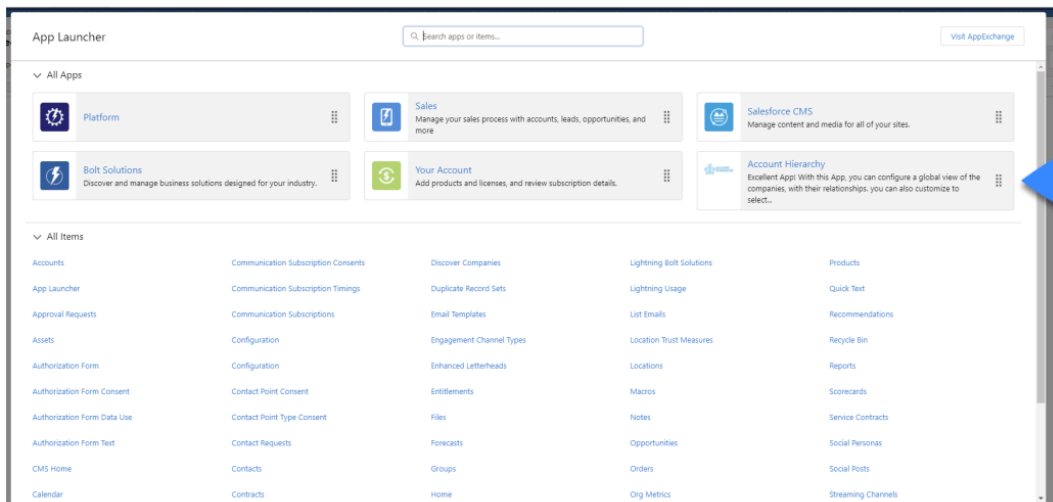
Once you install an application from AppExchange you can navigate to the application configuration page by following the steps

STEP 1: Open Configuration Page

Navigate to the App launcher and click on the “Account Hierarchy” application as shown in the following screenshot:



1 Click on the App Launcher Icon from top left corner.



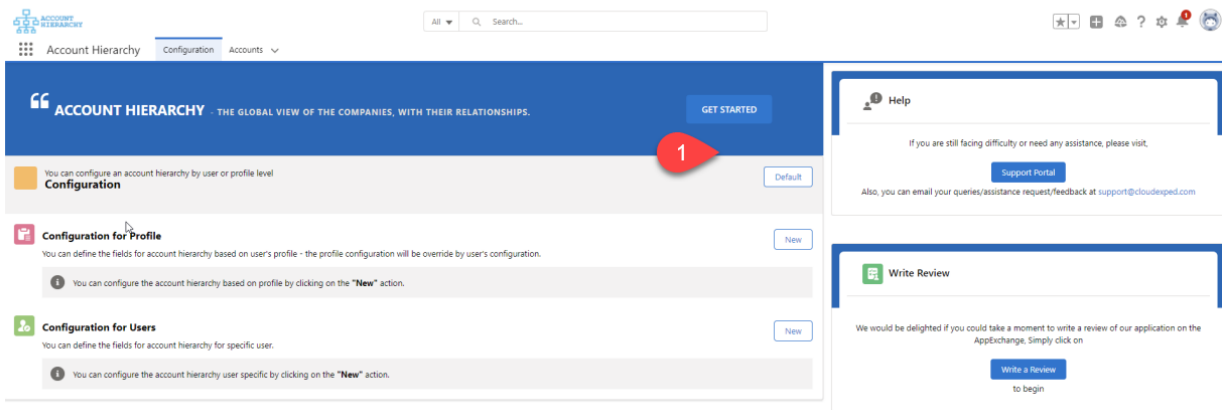
2 Click on the Account Hierarchy application from list of application

STEP 2: Configure Account Hierarchy Fields

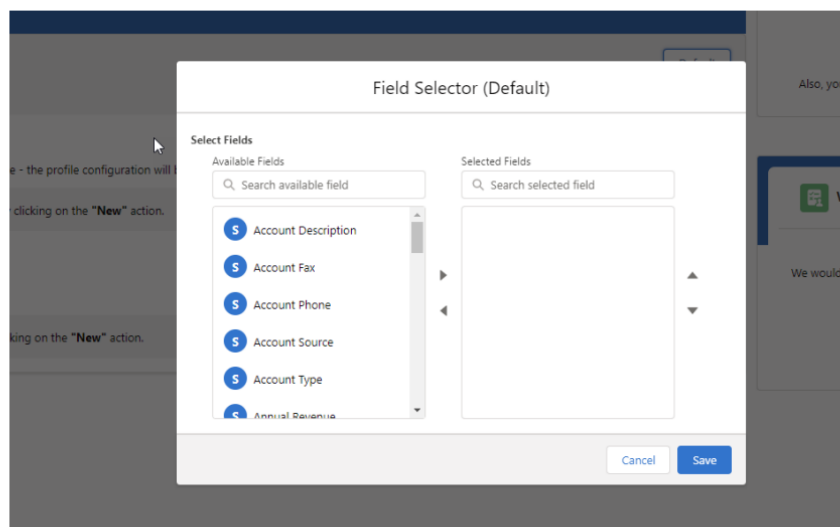
You can configure the account hierarchy fields based on the following three criteria.

Default

Default field configuration will be applied if an administrator does not configure the current user profile or user-based configuration.



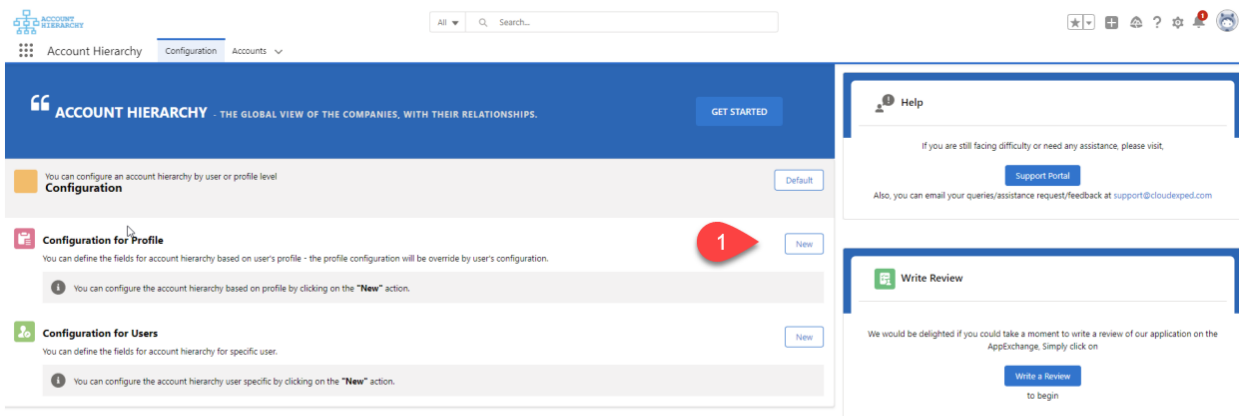
- 1 Click on the **Default** action from configuration page



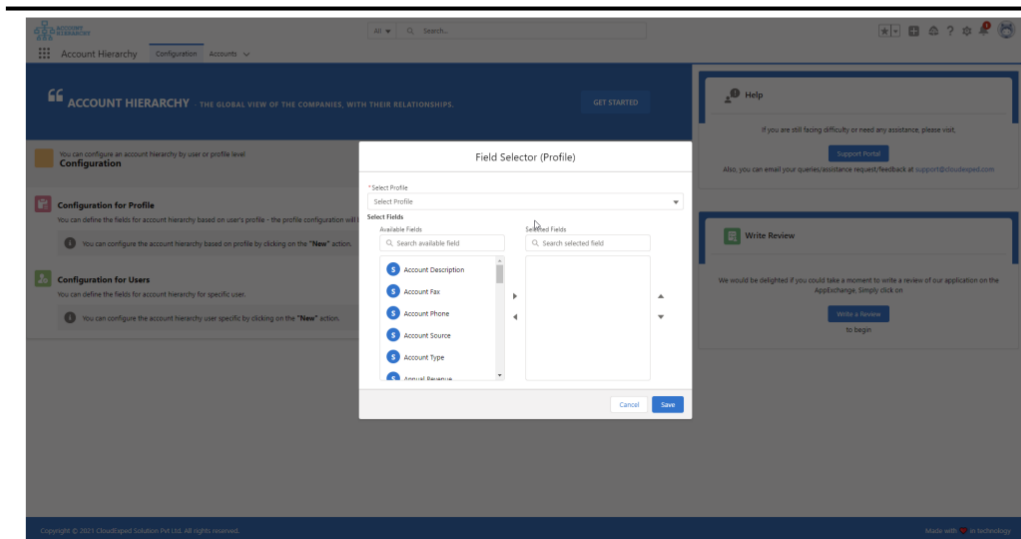
- 2 Select the fields from available fields to selected fields to display on account hierarchy

Profile Based Configuration

If you would like to configure the fields based on the user profiles you can configure them using the following steps



1 Click on the **New** action from **Configuration for Profile** section

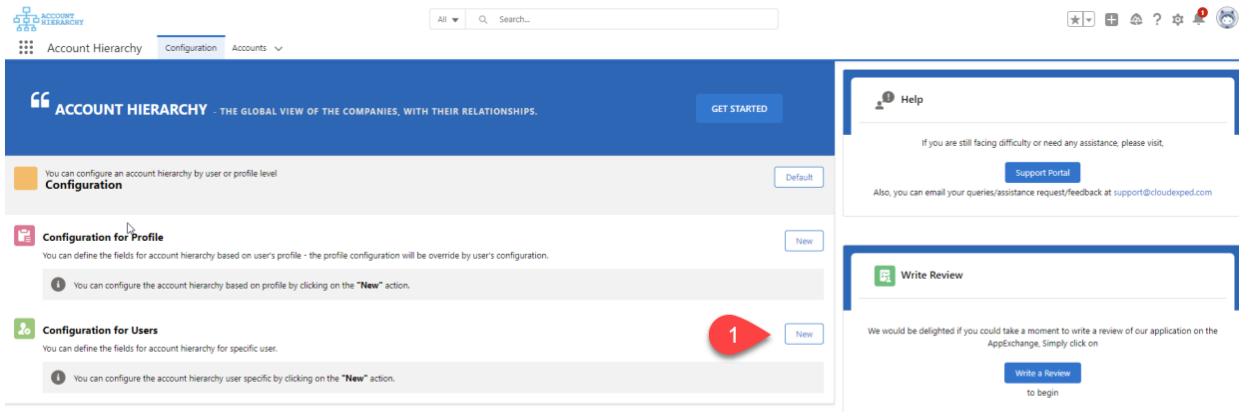


2 Select **Profile** for which you would like to configure the fields

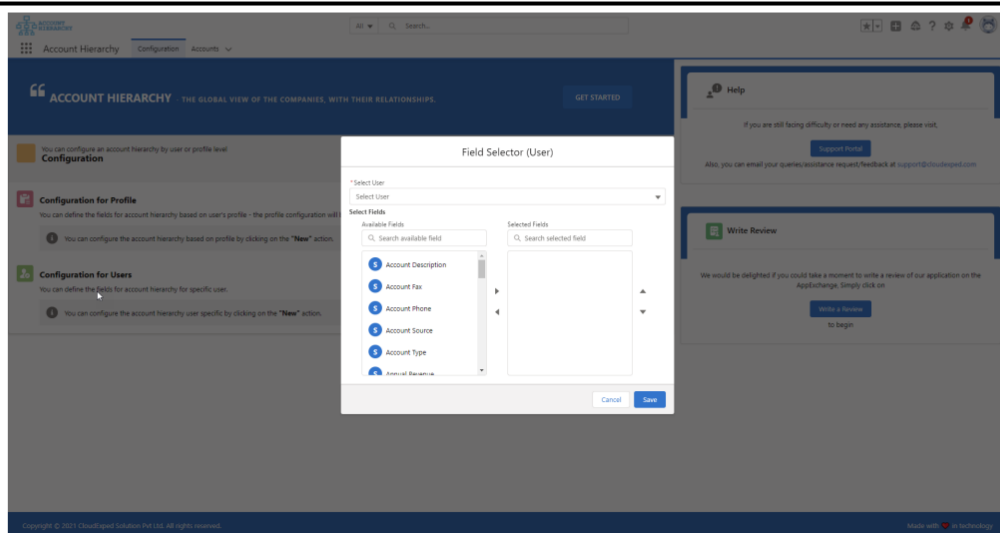
User Based Configuration

If you would like to configure the fields based on the user specification you can configure them using the following steps.

Note: User based configuration will be override the Profile level configuration



1 Click on the **New** action from **Configuration for Users** section



2 Select **User** for which you would like to configure the fields

Add Account Hierarchy Component on Lightning Account Page

You can add the account hierarchy component in lightning account page using the following steps

Navigate to the Account Lightning page and add the “**Account Hierarchy by CloudExped**” component from “**Custom- Managed**” section to appropriate location on the page.

The screenshot displays the Lightning App Builder interface for editing the 'Account Record Page'. On the left, the 'Components' panel is open, showing a search bar and a list of component categories: 'Standard (31)', 'Custom (0)', and 'Custom - Managed (1)'. Under 'Custom - Managed (1)', the 'Account Hierarchy by CloudExped' component is listed. A yellow callout bubble with the number '1' points to this component. The main preview area shows a sample account record for 'Haley, Herman and Sawayn'. Below the account header, the 'Account Hierarchy' component is visible, displaying a list of sub-accounts under the heading 'ACCOUNT NAME'. A yellow callout bubble with the number '2' points to this list. The right sidebar shows the 'Activity' and 'Chatter' sections.

Add Account Hierarchy on Classic Account Page

You can add the account hierarchy on the classic account page using the following steps

Navigate to the Account page layout and add the “**Account Hierarchy**” visualforce page into page layout as shown in the following screenshot

Note: Set visualforce page height to 400

