

User Guide

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



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Introduction

This document aims to guide an end user to use 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



Account Hierarchy Component Features

Account Hierarchy component will help users the global view of the companies with their relationships.

ACCOUNT NAME	YEAR STARTED	ACCOUNT DESCRIPTION	ACCOUNT FAX	ACCOUNT NUMBER	ACCOUNT PHONE	ACCOUNT RA
▼ Pacocha, O'Kon and Bayer						
▼ Graham Group						
▼ Corkery, Wolff and Feil						
▼ Christiansen-Shanahan C						
▼ Tremblay, Doyle and Tromp						
Grady-Romaguera						
Wiegand Inc						

1. **Details of hierarchy** - This section shows the details of hierarchy like how many records are in the hierarchy and at what position current record present within hierarchy
2. **Full Screen** - If you hierarchy has large number of relationship you can view it in full screen by clicking on the full screen action
3. **Account Name Column:** This is special column for account hierarchy as it will be always stick to left side and allow user to scroll horizontally to view additional details
4. **Collapse/Expand:** With the help of arrow prepended to account name user can collapsed or expand the hierarchy easily
5. **Current record symbol: "C"** symbol shows a current record within hierarchy for easy view.

Account Hierarchy with more than 13 Depth

The account hierarchy with more than 13 depth for relationship will show the following way:

Account Hierarchy
United Oil & Gas, Singapore

991 records • Current record at 987 position within hierarchy

1

13-26

ACCOUNT NAME	BILLING CITY	BILLING COUNTRY	BILLING GEOCODE ACCURACY	BILLING LATITUDE	OWNER
▼ Schiller, Johnston and Walsh	Dulles				Schiller, Johnston and Walsh
▼ Breitenberg, Wintheiser and Wunsch	Elmira				Breitenberg, Wintheiser and Wunsch
▼ Koelpin-Hills	Washington				Koelpin-Hills
▼ Gibson-McKenzie	Winston Salem				Gibson-McKenzie
▼ Miller, Berge and Ziemann	Manchester				Miller, Berge and Ziemann
▼ Russel, Connelly and Borer	Springfield				Russel, Connelly and Borer
▼ Blanda-Kuhn	Kansas City				Blanda-Kuhn

The additional dropdown will show the depth level of hierarchy so user can select the depth levels from hierarchy to be display like in above example user has selected the range of depth is - **13- 26**

