Customizable Account Hierarchy Quick Start Guide

About This Guide

This Quick Start guide is designed for Admin users who have prior experience installing and configuring products from AppExchange. An abbreviated set of instructions is provided to quickly get you set up with iTools Customizable Account Hierarchy. A more complete set of step-by step instructions and supporting information can be found in the iTools Customizable Account Hierarchy Configuration Guide available on our website or AppExchange listing.

About iTools Customizable Account Hierarchy

iTools Customizable Account Hierarchy lets you create a comprehensive global view of a company and its subsidiaries. Simply pick and choose what information to display in the Account Hierarchy list to customize the view for your special needs. Standard and custom fields as well as fields from related objects can be displayed. An Account Hierarchy configuration is provided for all users in an organization, but can be personalized by profile and for individual users. Expand/Collapse levels for better viewing of large and/or deep hierarchies. Clickable column headers let you quickly sort on any field. Printable View and Export capabilities are also available.

With its tabbed interface, iTools Customizable Account Hierarchy brings together information from related Contact, Opportunity, Task, Event, Case, Contract and Custom objects in a single view. This makes it super easy to better analyze, manage and coordinate activities for an account and all its associated subsidiaries. In addition, the iTool also provides a custom Ultimate Parent field that ties together all the accounts in the family, allowing you to easily create account family based reports and dashboards. And finally, no account hierarchy is too big for iTools Customizable Account Hierarchy – see all accounts, even if there are more than 1,000 in the hierarchy.

Version Updates

New In Version 4.8

Based on direct feedback from our great customers, version 4.8 includes the following feature enhancements:

Filters and Views – Accounts Tab: Search, filter and view accounts and their associated account hierarchy information using Account Specific Tab Filters and Tab Views.

Filters and Views – Enhanced Search criteria: Even more robust search criteria capabilities for fields of all data types.

3-level Sort: Up to 3 sort fields can be selected to sort the information displayed on each tab.

New In Version 4.7

Account Explorer View: Search, filter and view accounts and their associated account hierarchy information all from a single, fully customizable page.

Views - Dynamic Fields: Select dynamic field criteria in a list view definition to allow your users to dynamically enter field filter information from the iTools Account Hierarchy and Account Explorer pages.

Views – Enhanced Search criteria: Even more search criteria capabilities.

Page level configuration options: New page parameter options are available for customizing the iTools Account Hierarchy page. Useful when including the Account Hierarchy page as an inline component on the Account detail page or any other custom Visualforce page.

New In Version 4.5

Salesforce1 Support: The iTools Customizable Account Hierarchy pages are now accessible from the Salesforce1 mobile platform.

Views – Save As: Multiple versions of a configurable view can be created with the new Save As feature.

Views – Enhanced Search Criteria: Additional advanced search criteria capabilities.

New In Version 4.4

Configurable 'Views': The 'Views' list that previously appeared on only a sub-set of the related object tabs has been enhanced so that each list of views and associated filter criteria is now fully customizable and available on each related object tab.

Default 'View': The initial view selected in the 'Views' list for each related object tab is now part of an iTools setting that can be configured by your Salesforce Admin.

Tab Filter Criteria: Filter criteria can be defined for each related object tab in order to limit the items displayed on the associated Account Hierarchy tab. Similar to a 'View', the tab filter differs in that the filter is always applied by default. Tab Filter criteria is most useful in those situations where certain types of items should always be excluded from the display (such as items marked as 'InActive'). A filter is also helpful if you want to reduce the items on the tab to a reasonable number (such as those created within the last 2 years). If both are defined for a tab, criteria from the selected View ***<u>and</u>*** the Tab Filter are combined when displaying the results on the Account Hierarchy tab.

New In Version 4.3

Show Hierarchy View: A new 'Show Hierarchy' link is available on the related object tabs that, when clicked, will update the view to display the related items within the context of the account hierarchy. In this view, items (Contacts, Opportunities, Cases, etc.) are sorted within the context of their parent account in a hierarchical display rather than across all accounts in a non-hierarchical display. Simply click the 'Hide Hierarchy' link to return to the non-hierarchical view.

iTools Settings - Save As: For administrative efficiency purposes, a new 'Save As' button has been added to the iTools Customizable Account Hierarchy Component settings on the iTools Settings Tab. This button comes in real handy when you want to clone a particular tab configuration for use with other profiles and/or users.

iTools Settings – ShowOrgChartLink: This new option allows you to specify whether or not the 'Show Org Chart' link should be displayed on the iTools Account Hierarchy Contacts Tab. By default, the Show Org Chart link is displayed.

iTools Settings Component Settings - Customize the Edit My Display Settings page: With this new option on the ObjectComponent settings configuration page, an administrator can specify which objects and fields are excluded from the available fields list for selection by users when the '**Edit My Display Settings**' feature is enabled.

New In Version 4.1

Custom Page Tabs: Incorporate custom VisualForce or website pages directly in the Account Hierarchy view with our new Custom Page Tabs. Whether you have unique display requirements or want to add some sizzle to the view, Custom Page tabs is yet another way to extend and customize the view to meet your needs.

Option to show all associated object information for all accounts in the hierarchy regardless of sharing settings: A new option is available that, when enabled, will display all associated object information for all accounts shown in the iTools Account Hierarchy view regardless of whether or not the current user has been granted explicit view access to all the objects and fields. Similar to role hierarchy, this option provides runtime read access based on the account hierarchy association. If a user has access to one account in the hierarchy, then they are automatically granted read access to all associated object information for all accounts displayed in the iTools Account Hierarchy view.

Important Note: If the user clicks on any related item link to view the details, but does not have read access, then Salesforce will display its standard error message.

Improved Formatting Part II: All field values are displayed using native Salesforce.com formatting. So, clickable hyperlinks are shown on related objects, email addresses, websites and ticker symbols. Checkmark images are shown for yes/no values. And, full advanced multi-currency display is supported.

More Columns: Up to 20 fields can now be configured as columns on each iTools tab.

New In Version 4.0

Profile Specific Overrides: Configuring the iTools Customizable Account Hierarchy has been expanded to allow customizations for users based on their profile. For larger organizations with many different types of users, this additional level of flexibility makes it easy to custom design and maintain the solution to support the varying business needs within an organization.

Export and Printable View: Quickly print or export the account hierarchy information directly from the view with a single click – no need to create and maintain custom reports.

Improved Formatting, Part I: Account information is now more appropriately aligned and formatted in the view. Custom currency formatting is also available for single currency orgs

Before You Begin

The iTools Configuration Manager is the prerequisite package used for licensing and settings management of all iTools, including iTools Customizable Account Hierarchy. The iTools Configuration Manager **Version 4.6 or later** must be installed and a license assigned to your account in order for you to install and configure Customizable Account Hierarchy.

Installing iTools Customizable Account Hierarchy

1. Begin the installation of **iTools Customizable Account Hierarchy** from AppExchange by using the following link:

   https://appexchange.salesforce.com/listingDetail?listingId=a0N30000001gFEWEA2

2. Click on **Get It Now.**
3. Follow the standard AppExchange instructions including choosing your environment and verifying the Terms and Conditions of the iTools subscription.
4. When you are prompted to choose the security level, we recommend you select the **Install for All Users** option. Keep in mind that only those users assigned an iTools Customizable Account Hierarchy license will actually be able to view and access the iTools features.
5. Click **Install** to complete the installation. When you have received confirmation that iTools Customizable Account Hierarchy has successfully installed, continue with the next section to configure the iTool for your environment.

Configuring iTools Customizable Account Hierarchy

1. Add the View Hierarchy Button to your Account Page Layout
   - Go to **Setup | Customize | Accounts** and click the **Page Layouts** link.
   - In the Account Page Layouts list, click the **Edit** link in the Action column.
   - In the upper left area of the page, select the **Buttons** option.
   - Find the button labeled **View Hierarchy** and drag it to the section on the layout labeled **Custom Buttons**.
   - Click the **Save** button.
2. Customize the Account Hierarchy View
   - Go to the **iTools Settings** Tab.
   - Select **Customizable Account Hierarchy** in the iTool drop-down list.
   - Click the **AccountComponent** link in the Settings section.

- Click the **Edit** button at the top of the page.
- In the section titled Step 2, add the fields you would like to appear as columns on the Accounts tab of the Account Hierarchy view.
    - In the **From** field, choose **Account** or the appropriate **Accoun**t related object.
    - In the **Field** list, choose the appropriate field name.
    - Click the **Add** button to add the field to the Selected Fields list.
    - Add additional fields to the Selected Fields list. Use the Up and Down arrow buttons to order the fields in the list. Select the **Edit** button to change the column heading used for the field.
- Review the selections and values in the options listed in Step 3.
- Click the **Save** button.
- Repeat the above steps for each of the ***Object*Component** Settings in the Settings list.
- Note: To configure a tab with information from any other standard or custom object, select one of the eight Custom***N***Component Setting links. In the Edit page, you must first select the related object you want to display in the custom tab. After that, you can use the options in the other sections to configure the tab just like any of the other standard tabs. Don't forget to select the **Show** checkbox in Step 1 if you want the tab displayed – for custom tabs, the checkbox is not checked by default.
- Review the values of the other Settings option and customize as needed.

3. Verify the **iTools Ultimate Parent Calculation Apex Job** completed successfully.
    - Go to **Setup** | **Monitoring |Apex Jobs** and locate the entries in the Apex Jobs list with the value of **InSitu_BatchUPCalc** in the Apex Class column.
    - Confirm the **Status** value is set to 'Completed' for all iTools Apex Jobs.
    - Go to the **iTools Settings** Tab, select **Customizable Account Hierarchy** in the iTool drop-down list and locate the **RunUPCalc** entry in the list. If the value in the status column shows that errors occurred, then click the **RunUPCalc** link and view the details. Refer to the iTools Customizable Account Hierarchy Configuration Guide, *iTools Ultimate Parent* section, for more information on how to identify and correct Batch Apex failures.

4. Allocate iTools Licenses (non-Sandbox orgs only).
   - Click **Setup | View Installed Packages.**
   - In the Installed Packages list, locate **iTools Customizable Account Hierarchy** and click on its **Manage Licenses** link.
   - Click the **Add Users** button at the top of the Licensed Users list.
   - Check the box next to those users who want access to the iTools Customizable Account Hierarchy features and click **Add** at the bottom of the page.

You also have the option to let your users edit their own display settings from the Account Hierarchy View page using the iTools **AllowEditMySettings** setting. Before you enable this option, please review the *iTools Settings* section in the iTools Customizable Account Hierarchy Configuration Guide. Depending on your Salesforce Edition, you may need to perform additional configuration steps.

Congratulations!

You have successfully completed the steps required to install and configure iTools Customizable Account Hierarchy. Keep reading for tips and information for a successful deployment of iTools Customizable Account Hierarchy.

Tips and Information for a Successful iTools Deployment

Licensing iTools Customizable Account Hierarchy

In order for other users to view the iTools Account Hierarchy button and access the customized view, the iTools Account Hierarchy licenses must be allocated. Like all other iTools, a license to the iTools Configuration Manager package is required for each user as well. Your organization receives one Configuration Manager license for each iTools subscription it purchases. Users that have not been assigned a Configuration Manager license may see the View Hierarchy button but it will not operate correctly. For further detail regarding license allocation and management, refer to the iTools Customizable Account Hierarchy Configuration Guide.

Learn More about iTools Customizable Account Hierarchy

- The iTools Customizable Account Hierarchy Configuration Guide provides step by step instructions, including screenshots, examples and explanatory text, for a more complete understanding of the features available. Please download and refer to the document to learn how to better customize the iTool for your organization.
- Additional information can be found on our website at http://www.insitusoftware.com and our Get Satisfaction powered Community forum at http://getsatisfaction.com/insitusoftware
- Have a comment, suggestion or question? Email us at support@insitusoftware.com.

Explore other iTools in the Collection

- Learn more about each iTool and see how they can make a difference in your organization.
- Visit the AppExchange to install and explore any or all iTools including:
    - iTools Delegated Tasks Management
    - iTools Employment Change Management
    - iTools File Cabinet
    - iTools Opportunity Status Monitor
    - iTools State/Country Validation
    - iTools vCard Creator