iTools

Customizable Account Hierarchy

Configuration Guide

Updated: January, 2025

Welcome

Thank you for choosing iTools for Salesforce by InSitu Software. If you recently purchased iTools, welcome to a robust collection of Salesforce.com tools that will enhance your Salesforce experience. If you are currently evaluating our tools, we hope that you, like a growing number of Salesforce users, find them to be an invaluable addition to Salesforce.com.

This configuration guide assumes that the iTools Configuration Manager has already been installed and will lead you through the installation process and configuration of iTools Customizable Account Hierarchy.

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 your Salesforce users, but can be customized by profile, role or personalized for individual users as needed. Clickable column headers let you quickly sort on any field.

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.

Lightning Support

The iTools Customizable Account Hierarchy fully supports the Salesforce.com Lightning Design System as well as the Classic user interface. All user interface components seamlessly transition with your users between Lightning and Classic editions, so you can easily use iTools as you plan your rollout to Lightning or stay in Classic.

Installation and Configuration Overview

This configuration guide is designed to lead you through the necessary installation and configuration steps for iTools Customizable Account Hierarchy. It may look lengthy and complex, but its step-by-step instructions, along with its visual format, will ease you through the process. There are four basic parts to the process.

This guide explains how to:

- Install the iTools Customizable Account Hierarchy into your Salesforce CRM environment.
- Configure the iTools Customizable Account Hierarchy to get it up and running.
- Apply the correct Customizable Account Hierarchy licensing.
- Configure each of the Customizable Account Hierarchy's iTools Settings to meet the specific needs of your organization.

Although every effort has been made to provide complete instructions, if at any time, you encounter issues or have questions, please contact us using any of the methods described in the Help and Support section at the end of this document.

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Before You Begin

iTools are designed for use with the following Salesforce editions:

- Salesforce CRM Professional Edition (PE)
- Developer Edition (DE)
- Enterprise Edition (EE)
- Unlimited (Performance) Edition (UE)

iTools can be installed in the sandboxes for any of the above editions as well.

Installation into any other edition, including Team, Group and Contact Manager Editions, is not supported.

You must have a Salesforce account to install iTools. If you do not have a Salesforce account and would still like to try iTools Customizable Account Hierarchy, visit Salesforce.com and sign up for a new free trial of Salesforce CRM.

If you are installing into a Professional Edition, your account Profile must be System Administrator. To install the iTools Customizable Account Hierarchy into any other supported edition, your user profile must include permission to Download AppExchange Packages and Manage Package Licenses. If your user profile in DE, EE and UE, is the standard System Administrator, you will, by default, already have these permissions.

Installing iTools Configuration Manager

In addition to the proper permissions, the iTools Configuration Manager, version 6.0 or higher, must be installed and a license assigned to your account. The iTools Configuration Manager is a prerequisite package and provides license management and configuration setting functionality for all iTools in the collection. If you have already installed the iTools Configuration Manager you can skip this section and continue with the next section.

To install the iTools Configuration Manager:

1. Go to the AppExchange located at:

   https://appexchange.salesforce.com/

2. Locate the listing for **iTools Configuration Manager** by searching for "iTools Configuration Manager" or direct your browser to:

   https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000001O7eMEAS

3. Click the **Get It Now** button and follow the installation prompts. When asked to choose the initial access to package resources be sure to select **Install for Admin Only**.

If you would like more detailed step-by-step instructions for installing the iTools Configuration Manager, please see the iTools Configuration Manager Configuration Guide available on the tool's AppExchange listing or on our website at https://www.insitusoftware.com/itools-documentation

Installing iTools Customizable Account Hierarchy

iTools Customizable Account Hierarchy can be installed from the Salesforce AppExchange into your environment by simply following the instructions below:

1. Go to the AppExchange located at:

   https://appexchange.salesforce.com/

2. Locate the listing for **iTools Customizable Account Hierarchy** by searching for "iTools Customizable Account Hierarchy" or direct your browser to:

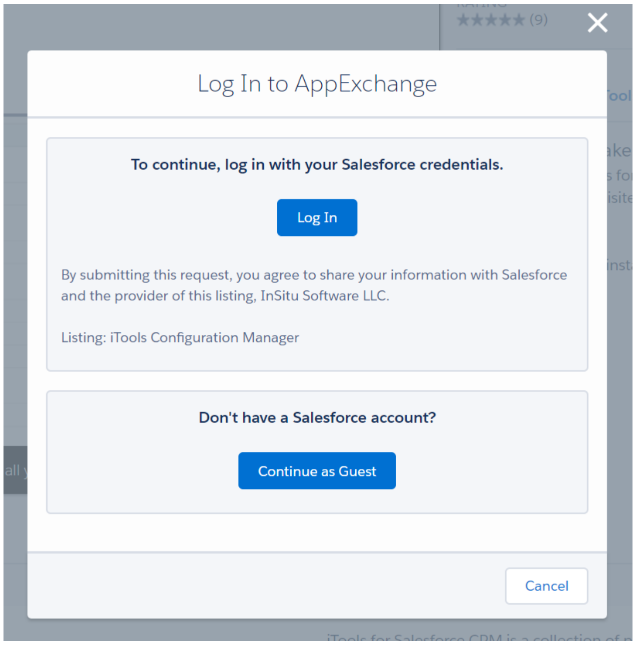
https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000001gFEWEA2

Make sure you are on the AppExchange listing for the **iTools Customizable Account Hierarchy**. iTools for Salesforce is sold as a single subscription but each individual iTool is installed separately and has its own similar looking AppExchange listing. Using separate listings ensures that you can install only the iTools that you need in your environment.

If you accessed the AppExchange from the AppExchange Marketplace link in the Setup section of Salesforce and are using the Lightning user interface, the next couple of steps may vary slightly in the details but the basic steps for starting the installation will be the same.

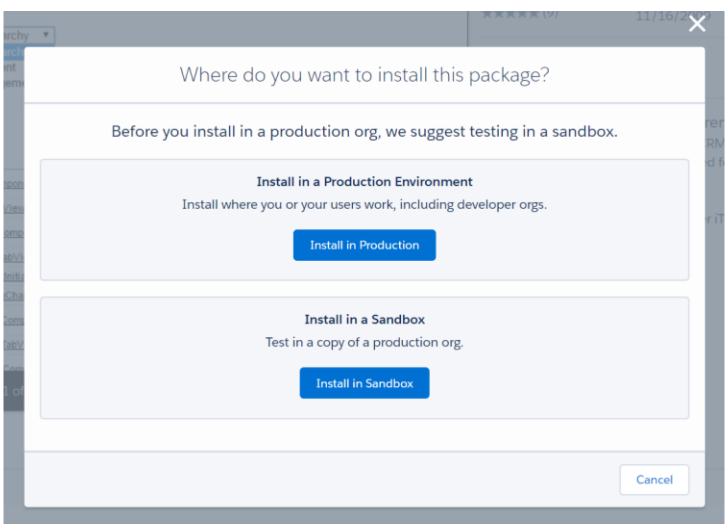
3. Click the **Get It Now** button**.**

4. If you have not already logged into the AppExchange, you will be asked to do so before you can continue with the install. If prompted, click the Log In button and provide your Salesforce.com credentials as requested.



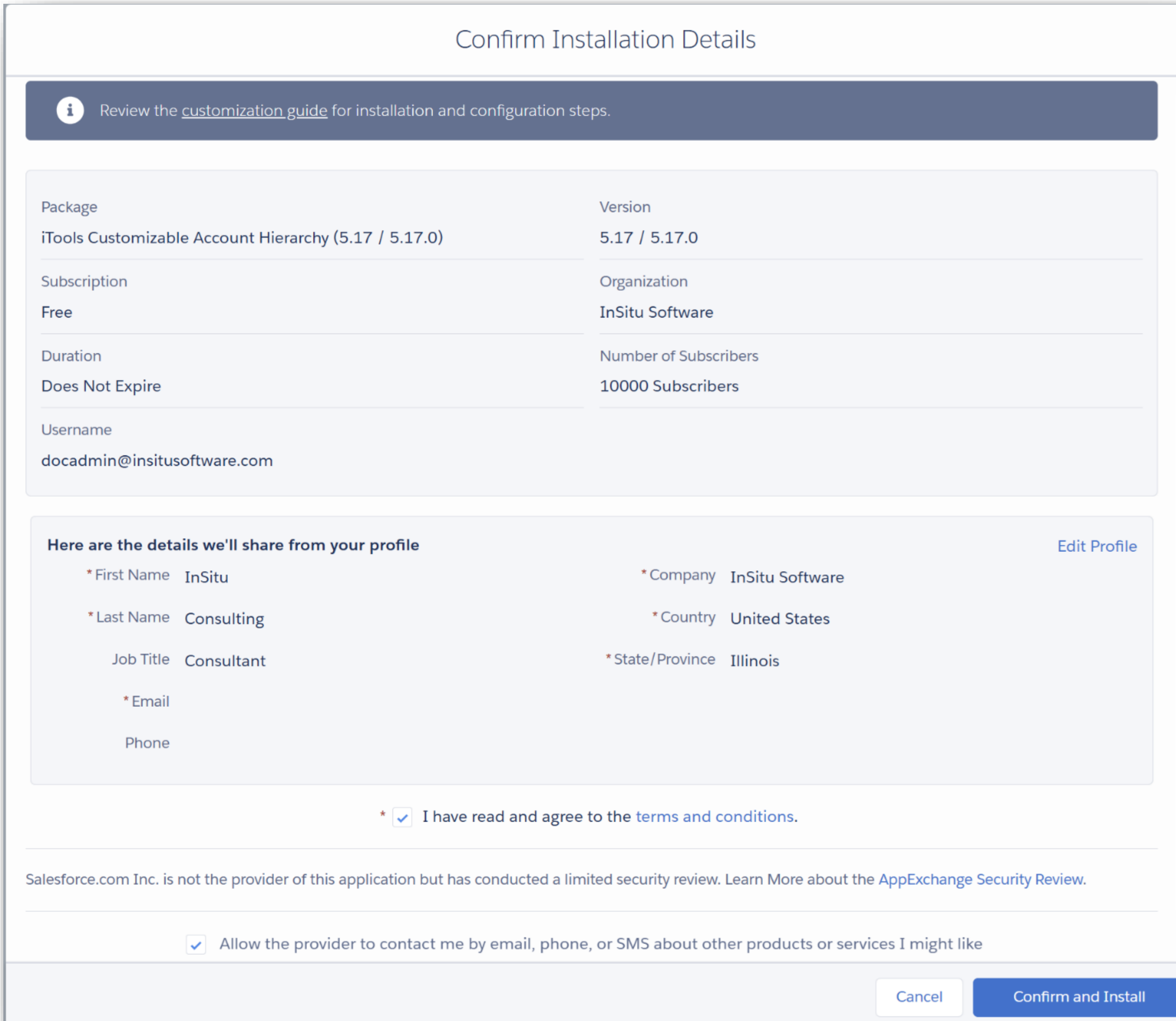
After logging in you may be returned to the iTools Customizable Account Hierarchy listing page and will need to click the **Get it Now** button again.

5. Next you must choose whether to install iTools Customizable Account Hierarchy into a Production or Sandbox Environment. iTools will work properly in either environment.



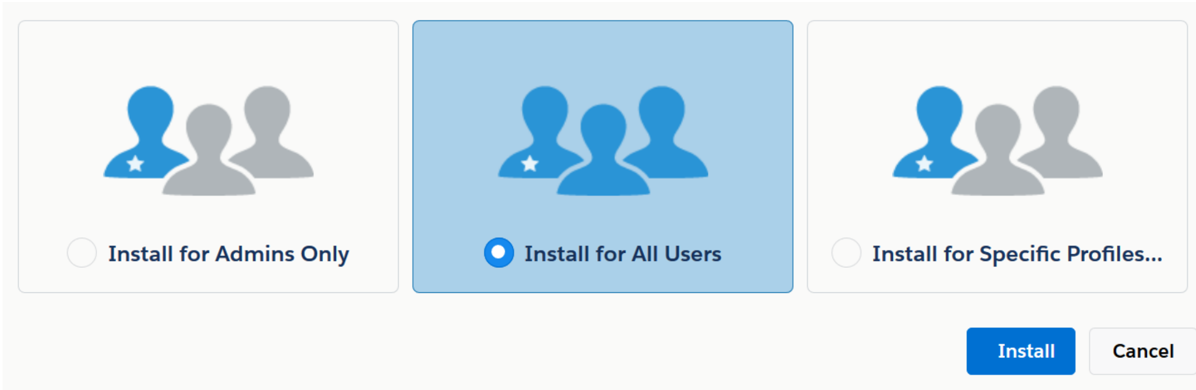
If you are installing into a sandbox org, Salesforce may request additional login credentials for the specific sandbox org you will be using.

6. The next step is to confirm the installation details, ensure that all required user profile information is filled in, collect agreement to the package's terms and conditions, and indicate if InSitu Software is permitted to contact you regarding other products and services. When you have provided the required information and agreed to the terms and conditions by checking the check the box at the bottom of the screen labeled **I have read and agree to the above terms & conditions**, click the **Confirm and Install** button.



7. Choose the initial access to package resources.

   For users to be able to use iTools Customizable Account Hierarchy they must be granted permission to access the tabs, custom objects, custom fields, Apex classes, and Visualforce pages that make up the application. InSitu Software recommends you select the **Install for All Users** option**.**



If you currently use the Professional Edition of Salesforce, you will not be given the option to which set of users have access to the package's resources. iTools Customizable Account Hierarchy is, however, fully functional in the Salesforce Professional Edition.

8. Click **Install** to complete the installation process. The installation of the iTools Customizable Account Hierarchy package generally requires only a minute or two but may take longer if the Salesforce.com services are being heavily utilized. If the installation requires more than a minute or so to complete you will be informed on screen of the delay and an email will be sent to you when the install is complete.

If you did not install the iTools Configuration Manager version 6.0 or greater before attempting to install iTools Customizable Account Hierarchy, you will receive an email from Salesforce indicating the install failed. The problem section of that email will indicate something like:

> (iTools Configuration Manager 6.0) A required package is missing Package "iTools Configuration Manager", Version 6.0 or later must be installed first.

iTools Settings

All iTools, including Customizable Account Hierarchy, include an extensive set of configuration settings used to control the appearance and behavior of the tool. These settings, called iTools Settings, belong to the iTools Configuration Manager package and are viewed and updated via the iTools Settings tab.

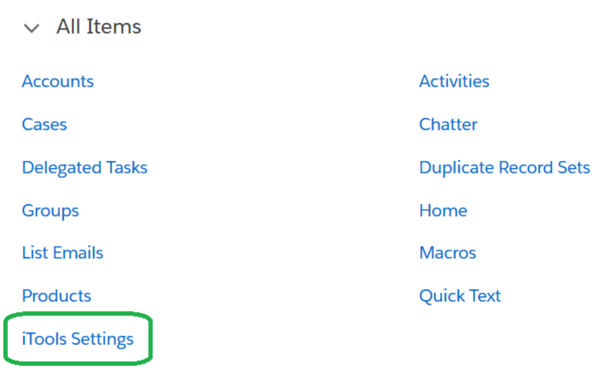
Throughout this guide, specific iTools Settings will be referenced and you may be instructed to set them to a certain value to affect the behavior or appearance of Customizable Account Hierarchy. All references to individual iTools Settings will appear in this guide as follows:

ExampleSetting

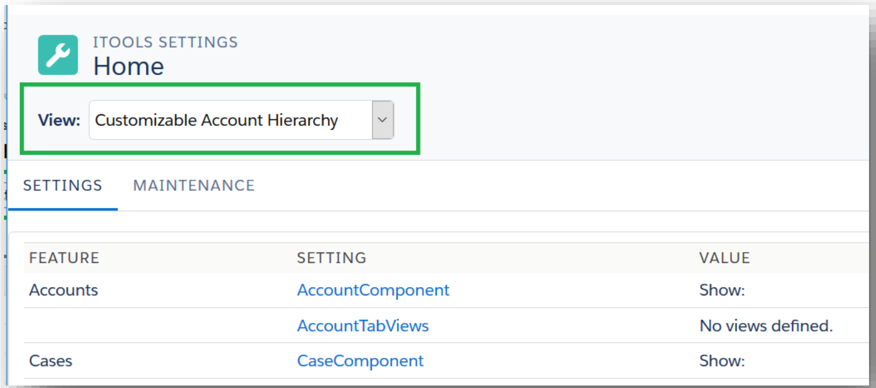
To access a specific setting follow these simple steps:

If you are using the Lightning User Interface

1. Click the "nine dot" icon in the top left of any page.
2. Click the iTools Settings option in the All Items section



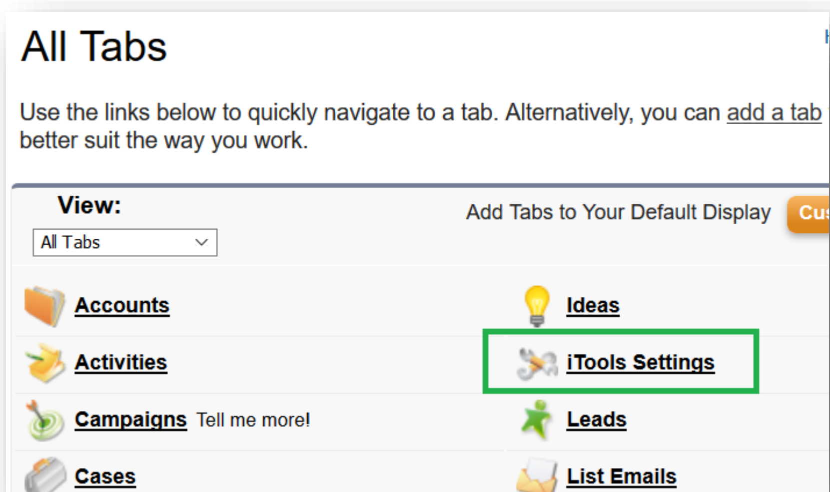
3. Select "Customizable Account Hierarchy" in the **View** dropdown list if it is not already selected.



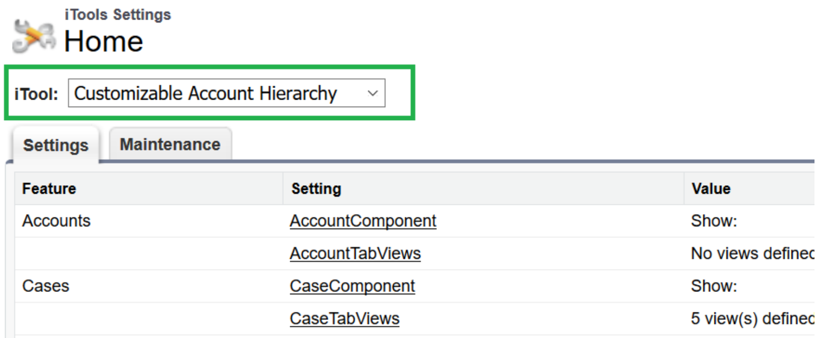
4. Locate the referenced setting in the Setting column and click it.

If you are using the Classic User Interface

1. Click the “plus” tab at the far right of the tab bar.
2. Click the iTools Settings option in the list of All Tabs



3. Select “Customizable Account Hierarchy” in the **iTool** dropdown list if it is not already selected.



4. Locate the referenced setting in the Setting column and click it.

> Where screen shots are needed in this guide to point out additional options within an iTools Setting, the Lightning UI version of the page will be used. The Classic UI version of the page will contain the same fields and buttons and behave in an identical manner, it will simply look a bit different. Either user interface can be used to manage any of the individual iTools Settings.

Configuring iTools Customizable Account Hierarchy

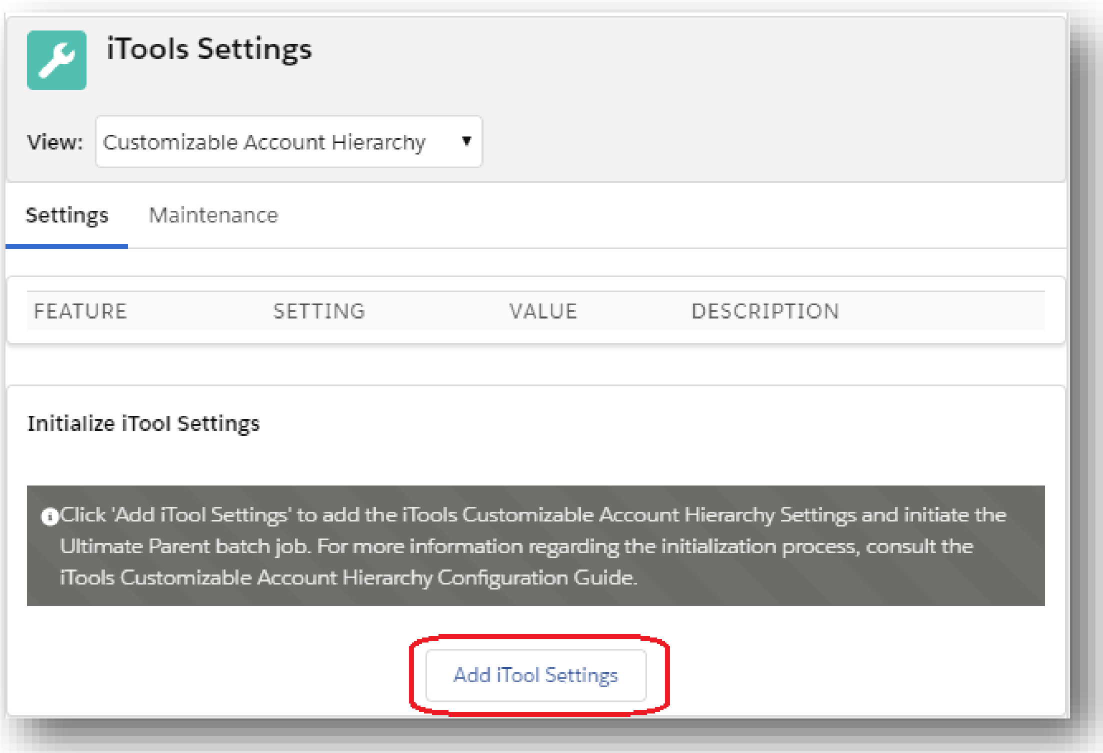
Now that iTools Customizable Account Hierarchy is installed, there are a few simple configuration tasks that must be completed before you can begin to use the tool.

Add iTools Settings Records

iTools Settings records are used to configure the Customizable Account Hierarchy to meet the specific needs of your organization. These records are added to your Salesforce environment using the iTools Configuration Manager. Follow the steps below to add the initial iTools Settings records for Customizable Account Hierarchy.

1. Go to the iTools Settings tab. Select “Customizable Account Hierarchy” in the iTool dropdown list if it is not already selected.

2. Click the **Add iTool Settings** button. Then click the **Confirm** button.



3. In addition to configuring the iTools settings for the Account Hierarchy view, a batch Apex job was automatically started. The purpose of the batch job is to populate the value of the iTools custom field called 'Ultimate Parent'. The Ultimate Parent field was added to the Account object as part of the iTools Customizable Account Hierarchy installation. The value in this field is used to tie together all accounts that are part of the same account family. So, before any accounts can be included in the Account Hierarchy view, the Ultimate Parent value must be set.

   Depending on the number of Account records in your Salesforce CRM system, it may take a while for all accounts to be updated with the Ultimate Parent value. To monitor the progress and status of the batch Apex Job, follow these steps:

   a. Access the list of Apex Jobs by going to Setup > Environments > Jobs > Apex Jobs.

   b. In the Apex Jobs list, find the entry with the value **InSitu_BatchUPCalc** listed in the Apex Class column. The iTools Ultimate Parent Calculation is completed when the value in the status field is **Completed** and the number in the **Batches Processed** column is equal to the number in the **Total Batches** column for all iTools Validation jobs.

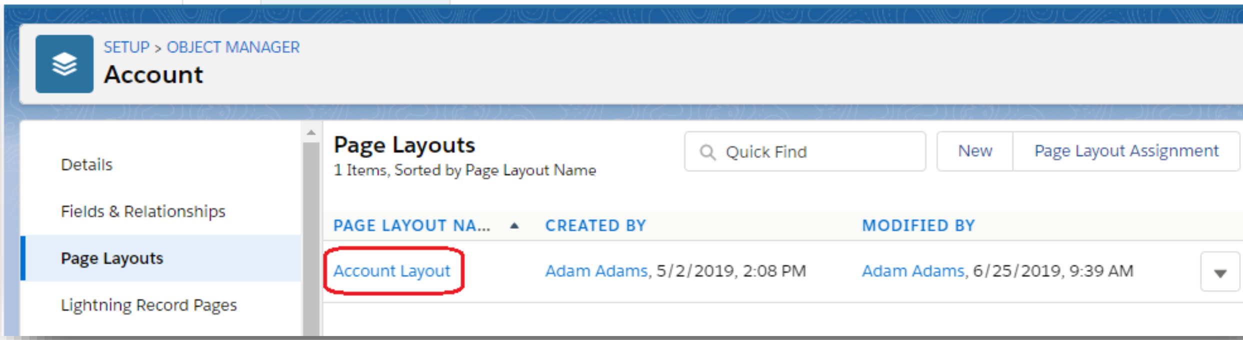
A more robust, complete and structured view of the error information can be found in the iTools **RunUPCalc** Setting. In addition, you can have iTools automatically send an email with the information any time a job completes with errors by enabling the **SendEmailOnError** iTools Setting.

Important: Even though the number in the **Failures** column may be 0, errors may have been generated and need to be corrected. See *iTools Ultimate Parent* section for more information on how to identify and correct Batch Apex failures.

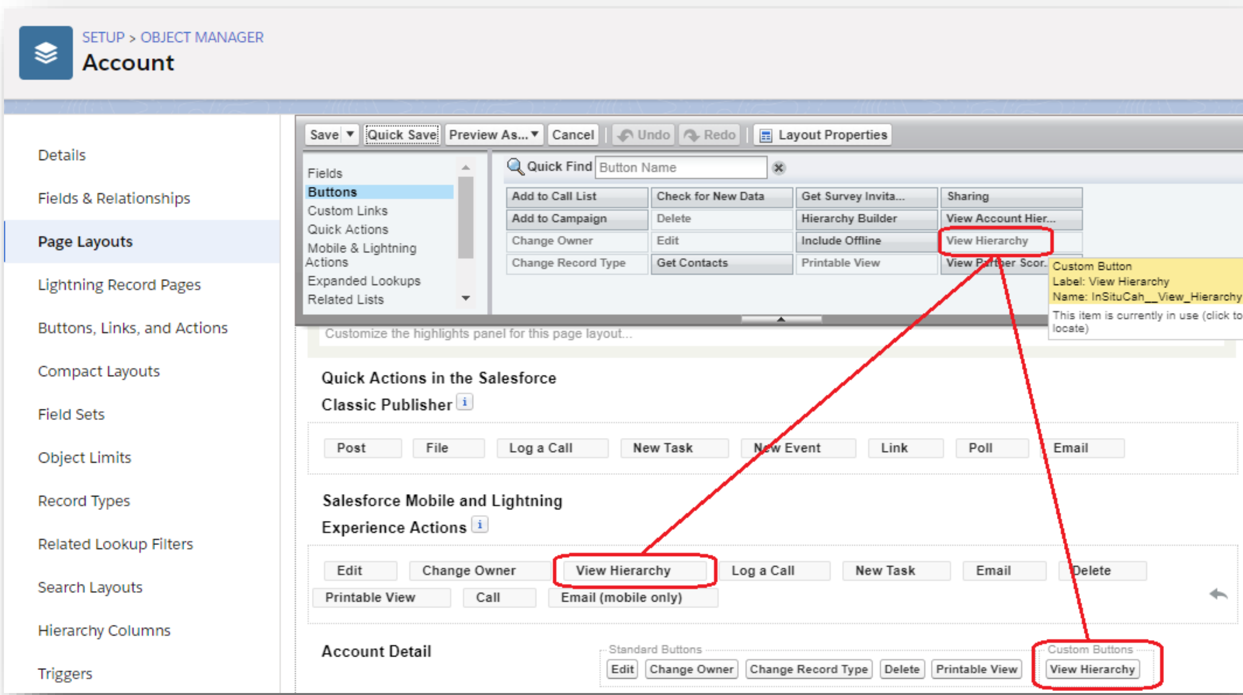
Add View Hierarchy Button to Account Page Layout

Your organization's customized Account Hierarchy page is accessed by clicking on a **View Hierarchy** button at the top of the account detail page. This button was added to your Salesforce environment by the install process but is not available to users until it is added to the Account Page Layout(s). Add the View Hierarchy button to the page layouts by following these quick and easy instructions:

1. Access the Account Page Layouts list by going to **Setup > Objects and Fields > Object Manager**. In the list, click the **Account** link. Then, click the **Page Layouts** link. Then, click the Name of the Page Layout (i.e. Account Layout) to update.



2. In the upper left area of the page, select the **Buttons** option. Find the button labeled **View Hierarchy** and drag it to:
   a. Salesforce Mobile and Lightning section
   b. Account Detail section, in the area labeled **Custom Buttons**.



3. Click on the Save button at the top of the page to save your changes and return to the list of Account Page Layouts.

If you have more than one Account Page Layout in your organization, you will need to repeat this task for each page layout. If you currently use the Professional Edition of Salesforce CRM, you will only have a single Account Page Layout.

If your organization is configured for Person Accounts, do ***not*** include the View Hierarchy button on your Person Account page layouts.

Customize the Account Hierarchy View

If you view the Customizable Account Hierarchy immediately after you installed the iTool, you will notice each tab in the view is quite sparse as only one column, Account Name, is displayed. To fill the Account Hierarchy view with information most important to your organization, you must choose the Salesforce fields that you want displayed as columns in the view. A custom iTools Edit Settings page is provided to configure the display for each of the tabs in the Account Hierarchy view.

To customize all settings for a specific tab, you use the associated iTools Account Hierarchy ***Object*Component** setting. For example, to customize the Accounts tab, you use the **AccountComponent** setting; for the Contacts tab, you use the **ContactComponent** setting. The **iTools Settings** tab provides the user interface to view and edit the ***Object*Component** settings for each of the 7 standard and 8 custom tabs in the Account Hierarchy view.

First, you should customize the iTools Account Hierarchy view that you want to appear for the majority of your users. Edit each of the ***Object*Component** settings using the **Default Value for All Users** section of the iTools Setting page. Then, as needed, use the **Profile Specific Overrides, Role Specific Overrides or User Specific Overrides** feature to customize some or all of the tabs for a group of users or an individual user. Additional details, with illustrations, can be found in the *iTools Settings* section of this guide.

You can control whether or not you want your users to edit their own display settings from the Account Hierarchy View page using the iTools **AllowEditMySettings** setting. Choose 'Yes' if you want the Account Hierarchy View to show the 'Edit My Display Settings' link. With this link, a user can create their own customized view. If you only want users with Admin access (using the iTools Settings page) to customize the view, then choose 'No' and the 'Edit My Display Settings' link will not appear on the Account Hierarchy View.

Enterprise, Unlimited and Developer Editions: With the Spring '10 release, Salesforce changed the security model for custom objects, which impacts the configuration of the **AllowEditMySettings** setting. If your Salesforce organization was created with the Spring '10 or later release, additional steps are required before your users are able to edit their own display settings. See the *iTools Settings* section for more information.

Allocate iTools Licenses

In order for other users to view the iTools Account Hierarchy button and access the customized view, licenses for both the iTools Configuration Manager and iTools Account Hierarchy must be allocated to them. These licenses will insure that your users can access and use the Customizable Account Hierarchy without encountering licensing restrictions. Additional details regarding the allocation of iTools Account Hierarchy licenses can be found in the next section titled *Licensing*.

If you installed iTools Customizable Account Hierarchy into a Sandbox org, licenses are automatically assigned to all users. Therefore, you do not need to execute any of the steps in this section.

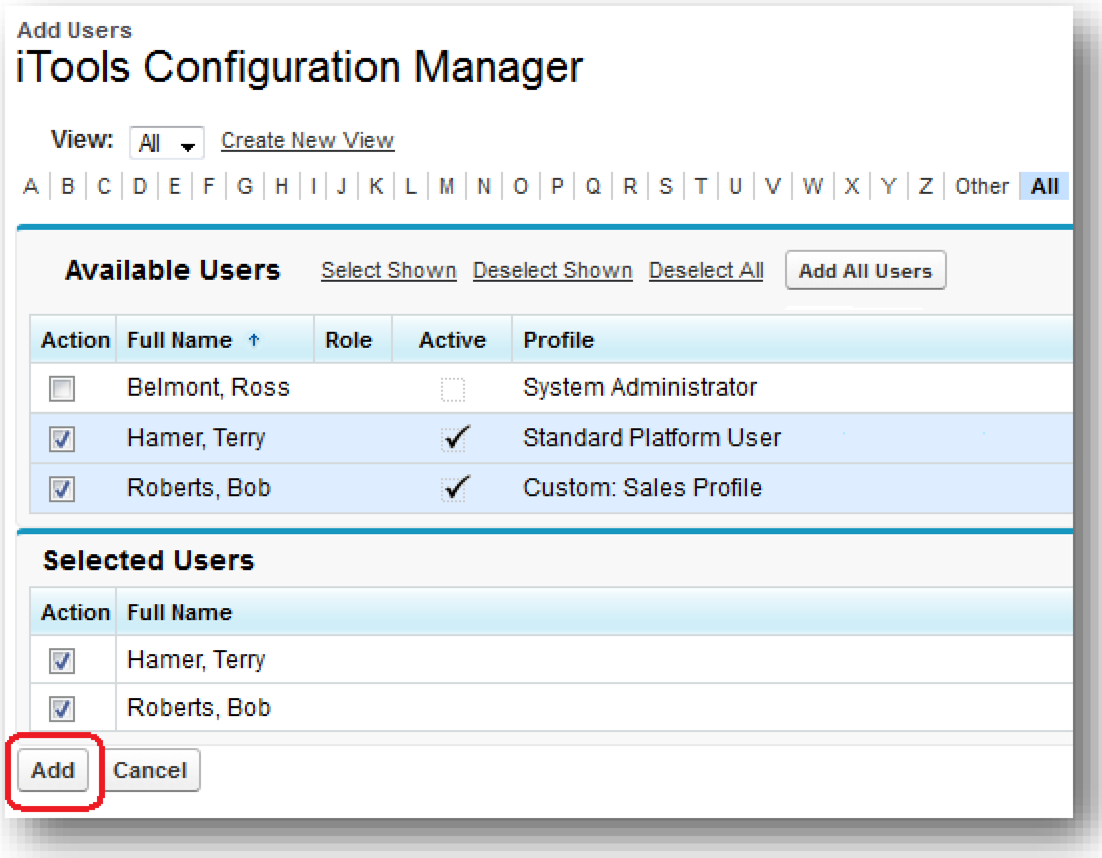
Follow these steps to assign a license to iTools Configuration Manager and iTools Customizable Account Hierarchy to other users.

Manage Licenses

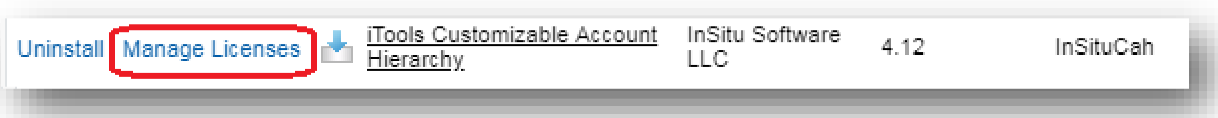
1. Go to Setup > Apps > Packaging > Installed Packages.
2. In the Installed Packages list, locate the **iTools Configuration Manager** row and click on the **Manage Licenses** link.

3. Click the **Add Users** button at the top of the Licensed Users list.

4. In the list of Available Users, locate those to whom you would like to grant a license, check the box next to their name(s) and click **Add** at the bottom of the page.



5. Allocate licenses for iTools Customizable Account Hierarchy by repeating steps 1-5. In step 3, be sure to locate the **iTools Customizable Account Hierarchy** and click on its **Manage Licenses** link.



Congratulations, you have successfully installed and configured the iTools Customizable Account Hierarchy. Although the **View Hierarchy** button is now operational, there is one additional step that must be performed to customize the view to support your organization's business needs. After the Licensing section, the following section will guide you through the final step needed to complete the set up for the iTools Customizable Account Hierarchy.

Licensing

The iTools Customizable Account Hierarchy uses the Salesforce CRM package licensing mechanism to control which users have access to its functionality. A user will only have proper access to the Customizable Account Hierarchy if they have been assigned a license to ***both*** the iTools Customizable Account Hierarchy ***and*** the iTools Configuration Manager.

Assignment of the Customizable Account Hierarchy licenses determines which users will see the View Hierarchy button on the account detail page. Users who do not have a Customizable Account Hierarchy license assigned to their account do not see the View Hierarchy custom button. Your organization was given a large number of Customizable Account Hierarchy licenses when the package was installed. This number is not necessarily the number of users that can be granted full Customizable Account Hierarchy functionality because the tool also requires the assignment of an iTools Configuration Manager license.

A license to the iTools Configuration Manager package is required for a user to have access to the Customizable Account Hierarchy as well as all other iTools. Your organization receives one Configuration Manager license for every 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.

InSitu Software uses the multiple package license approach to make it possible for customers to purchase iTools subscriptions for many, but not all of their users. While we believe an iTools subscription for all Salesforce CRM users is a valuable investment, we understand that such a decision is best left to the organization itself. It is important for you, the System Administrator, to understand how license allocation for both Configuration Manager and Customizable Account Hierarchy will impact your users. The following information should help with that understanding:

***Users that Have*: License to both Configuration Manager and Customizable Account Hierarchy**

- View Hierarchy button will appear on the account detail page.
- View Hierarchy button will operate correctly when clicked.
- NOTE: If your organization is purchasing an iTools subscription for every user and would like to make the View Hierarchy button available to every user, InSitu Software can configure your licensing so that every user is automatically granted a Customizable Account Hierarchy license. This will eliminate the administrative task of assigning Customizable Account Hierarchy licenses to users. Please

contact InSitu Software at support@insitusoftware.com if you are interested in this option.

***Users that Have*: License to Configuration Manager Only**

- User will not see the View Hierarchy button.

***Users that Have*: License to Customizable Account Hierarchy Only**

- View Hierarchy button will appear on the account detail page.
- Clicking on the View Hierarchy button will fail and the page will display the following error message:

> No License: You are currently not licensed to access this component. An iTools Configuration Manager license must be allocated to you before you can use the iTools Customizable Account Hierarchy. Contact your Salesforce.com administrator to request a license.

The assignment of a Customizable Account Hierarchy license to a user account that does not have a Configuration Manager license is considered a configuration error and should be corrected as soon as possible.

***Users that Have*: No License to Configuration Manager or Customizable Account Hierarchy**

- User will not see the View Hierarchy button.

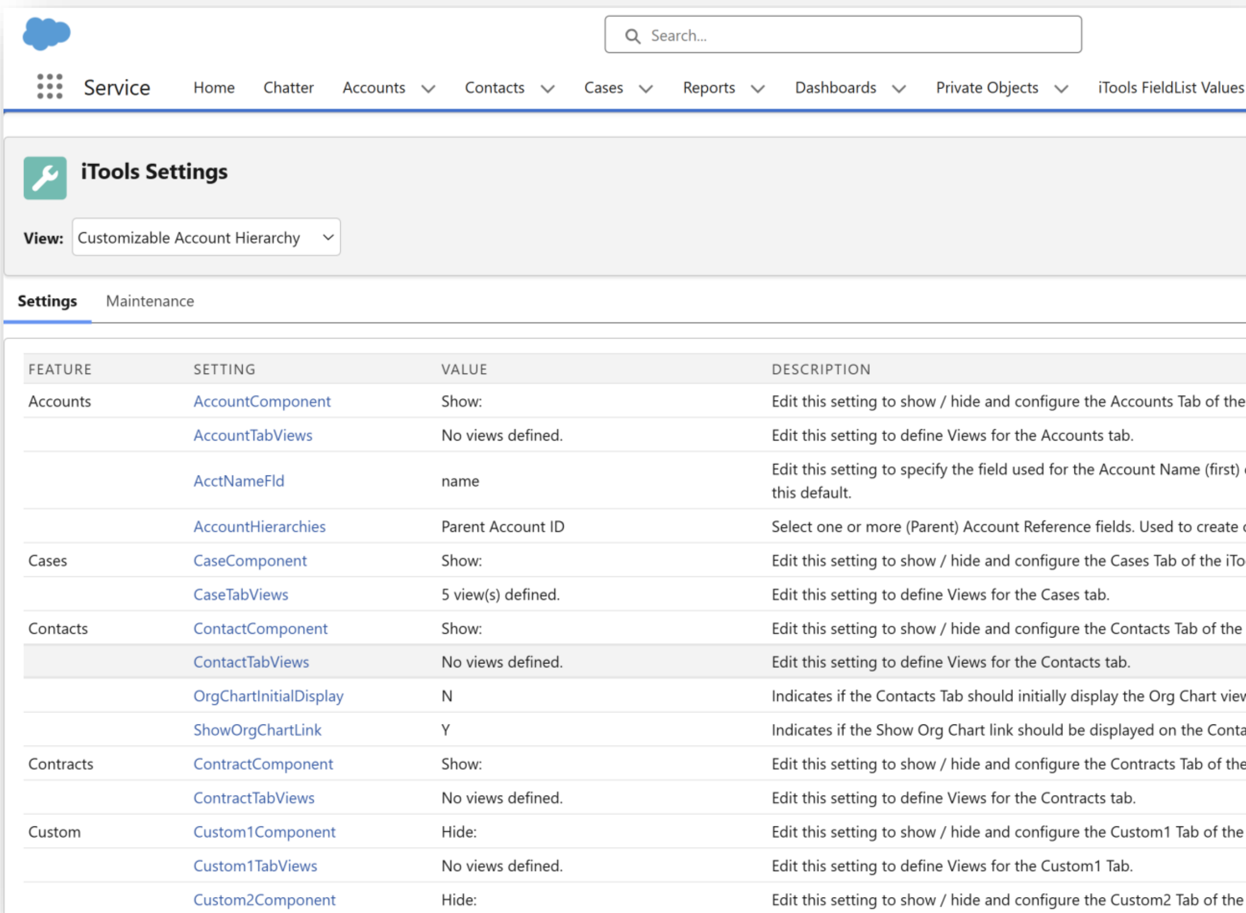
Salesforce CRM provides two ways to access license information, by user or by package:

- To see which packages an individual user is licensed for or to add/remove a package license to/from a user, go to **Setup | Administer | Manage Users | Users** and click on the name of the user you wish to view / add / remove a package license. The license information is displayed in the **Managed Packages** section near the bottom of the page.

To see which users have been assigned a license to a particular package, go to **Setup | Build | Installed Packages**, find the package in which you are interested and click on its name. Then, click on the **Manage Licenses** link. iTools that do not use the licensing mechanism to control access will not have a Manage Licenses link next to them as they are installed with an unlimited number of user licenses.

iTools Settings

All iTools, including Customizable Account Hierarchy, have a set of iTools Settings. These settings control the behavior of the iTool and can be modified to meet your specific needs. All iTool Settings are viewed and edited using the iTools Configuration Manager. To access the settings for the iTool Customizable Account Hierarchy, click on the iTools Settings tab which will take you to the iTools Configuration Manager home page. Then, select Customizable Account Hierarchy in the **View** drop down list.



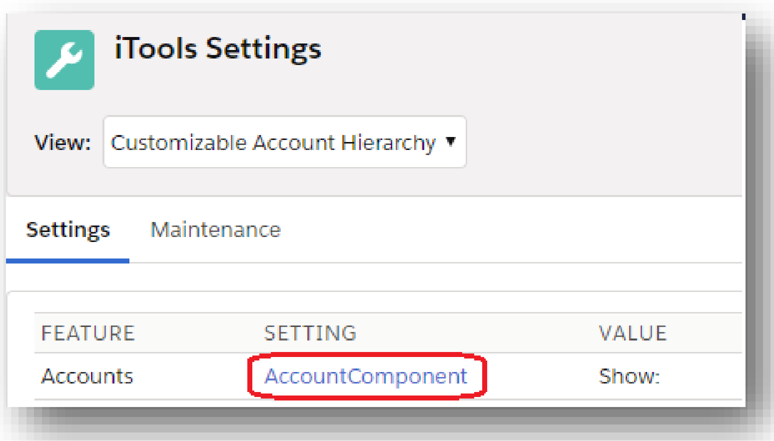
This section contains detailed information about each of the iTool settings associated with the Customizable Account Hierarchy. It explains the purpose of each setting, outlines the impact of modifying the settings and provides detailed instructions on how to edit the settings. Additional instructions regarding iTools Settings are available in the iTools Configuration Manager Configuration Guide. To view or download the guide, go to the Details Section of the AppExchange listing for the iTools Configuration Manager.

*Object*Component

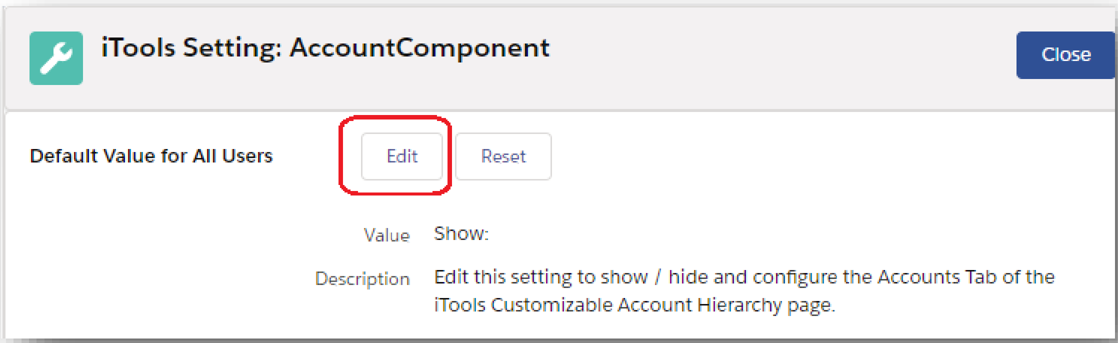
There are sixteen different ***Object*Component** settings - seven settings for the seven standard object component tabs (Account, Case, Contact, Contract, Event, Opportunity and Task), eight more for custom component tabs (Custom1 – Custom8) and one for the Explorer View. You can use the custom component settings to configure additional tabs for any related standard or custom object of your choosing. The ***Object*Component** setting is unique in that it is comprised of multiple display options (rather than a single option) that are updated using a custom Edit page. The custom Edit page is accessed using the same steps as you would follow to edit any iTools setting.

To edit the display options associated with an ***Object*Component** setting, simply follow the instructions below:

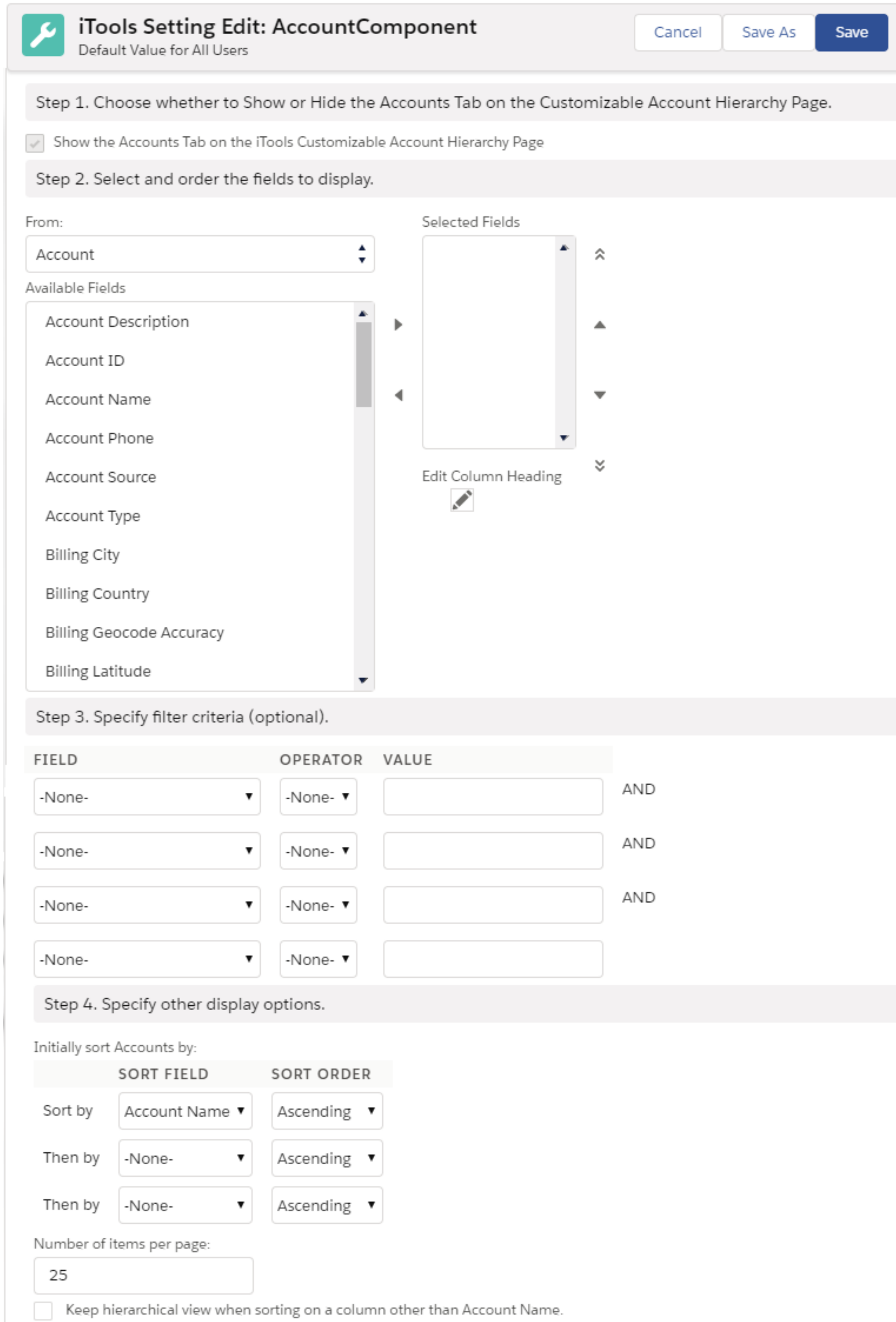
1. Select the ***Object*Component** Setting name in the list of settings. For this example, the **AccountComponent** setting was chosen.



2. Select Edit in the **Default Value for All Users** section of the **AccountComponent** page.



The following Edit page will display:

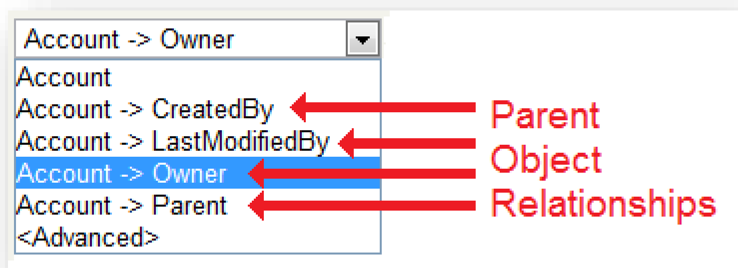

iTools Setting Edit: AccountComponent
Default Value for All Users
Cancel
Save As
Save
Step 1. Choose whether to Show or Hide the Accounts Tab on the Customizable Account Hierarchy Page.
Show the Accounts Tab on the iTools Customizable Account Hierarchy Page
Step 2. Select and order the fields to display.
From:
Account
Available Fields
Account Description
Account ID
Account Name
Account Phone
Account Source
Account Type
Billing City
Billing Country
Billing Geocode Accuracy
Billing Latitude
Selected Fields
Edit Column Heading
Step 3. Specify filter criteria (optional).
FIELD
OPERATOR
VALUE
-None-
AND
Step 4. Specify other display options.
Initially sort Accounts by:
SORT FIELD
SORT ORDER
Sort by
Account Name
Ascending
Then by
Number of items per page:
25
Keep hierarchical view when sorting on a column other than Account Name.

3. In the first section, Step 1, choose to Show or Hide the tab on the Account Hierarchy Page. If your organization does not use a particular object, such as Contracts, then you can 'uncheck' the checkbox and the associated tab will not appear on the Account Hierarchy page. **Special note**: Since Account is a mandatory object for the Account Hierarchy, the associated tab will always be displayed. Therefore, the checkbox is checked and marked as 'read-only', so it cannot be changed.

4. In the second section, Step 2, select the fields to display as columns in the tab. Fields from the component object and any associated object can be selected. In addition, you can reorder the display and change the column heading if desired.

   From

   The **From** drop-down list is used to select the Salesforce object that contains the field you want to choose. The list contains the component object, plus all other objects directly related to the component object. The relationship objects are easily identified in the **From** drop-down list because they are formatted using the parent object name followed by an arrow.



   Each time a selection is made in the **From** list, the contents of the **Available Fields** list will update with all of the fields from that object.

   The last item in the **From** list, <Advanced>, is a special option that should only be selected if the desired field is more than one relationship away from the parent object. See the <Advanced> Field Selection section below for more information.

   Available Fields

   The **Available Fields** control contains all the fields from the object selected in the **From** drop-down list. The values in this list will change when the selection in the **From** control changes. To add a field from the **Available Fields** list to the **Selected Fields** list, highlight the field and select the **Add** button. You can also double-click on the field in the **Available Fields** list to add it to the **Selected Fields** list.

Selected Fields

The **Selected Fields** control contains all the fields to be displayed as columns in the component tab. The order of the fields in the list (top to bottom) determines the order or information displayed in the component tab (left to right). To add a field to the list, highlight the field in the **Available Fields** list and click the **Add** button. To remove a field from the list, highlight the field in the **Selected Fields** list and click the **Remove** button. You can also double-click on the field in the **Selected Fields** list to remove it from the list.

iTools will automatically place the Account Name as the leftmost column in the list of items on the component tab. You do not need to add the Account Name as a field in the Selected Fields list.

Field Order Buttons

Four buttons are available to help you easily arrange the **Selected Fields** in the order you would like them to appear in the component tab.

Use the **Top** button to move the highlighted field in the **Selected Fields** list to the top of the list, making it the leftmost column in the component tab.

Use the **Up** button to move the highlighted field in the **Selected Fields** list up one position in the list, making it appear one position to the left in the component tab.

Use the **Down** button to move the highlighted field in the **Selected Fields** list down one position in the list, making it appear one position to the right in the component tab.

Use the **Bottom** button to move the highlighted field in the **Selected Fields** list to the bottom of the list, making it the rightmost column in the component tab.

Versions prior to 5.0: For all component tabs, ***except*** the Accounts tab, iTools will automatically convert the first (topmost) field in the component list to a hyper-link, so the user can easily access the details page of the component item. It is recommended that you select a unique, identifying field such as Full Name (Contact Component), Name (Opportunity Component) or Case Number (Case Component) as the first field in the **Selected Fields** list. In version 5.0, a new option has been added to control whether or not the first field is configured as a hyper-link to the associated component object.

Column Heading

The **Column Heading** value is used to identify the field in the **Selected Fields** list as well as to display in the column heading for the field in the component tab of the Account Hierarchy view. When you add a field to the **Selected Fields** list, the **Column Heading** value will automatically be set to the name of the field. Using the **Edit** button, you are able to change the Column Heading value for an individual field. There are often situations where the default column header is not preferred. A common use case is when the field name is very long, but the field value tends to be very short. By using a shorter column heading value, horizontal screen space is allocated more proportionally to prevent unnecessary scrolling in the view. For example, the column heading for the 'Billing State/Province' field is often changed to simply 'State', since the field value is usually just 2 characters in length.

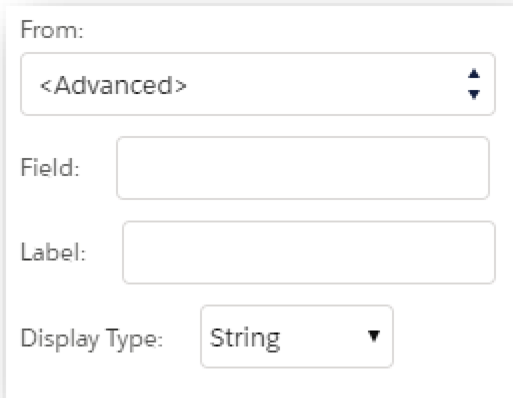
Display first column as link to object detail

The following checkbox will appear below the Column Heading controls for all component tabs, ***except*** the Accounts tab

When checked (default), the first (topmost) field in the component list will display as a hyper-link which, when clicked, will open up the details page of the component item. If not checked, the standard display format for the field data type will be used.

<Advanced> Field Selection

When the <Advanced> option is selected in the **From** list, the display of the controls on the page will change. Specifically, the **Field** attribute will change from a list control to an input field and you will be required to specify the field's Label and Display Type.



Field

The Field control is a text field in which the full reference to the component field must be specified. For example, if you wanted the Alias field of the Owner of the Account's Parent Account, you would select the <Advanced> option and enter the full field reference ***parent.owner.alias***.

When using an advanced field definition, please be sure to immediately test your iTool configuration as it is easy to make a typographical error. An incorrect field reference will cause the iTool to generate an error for anyone that tries to access the iTools Account Hierarchy view.

Label

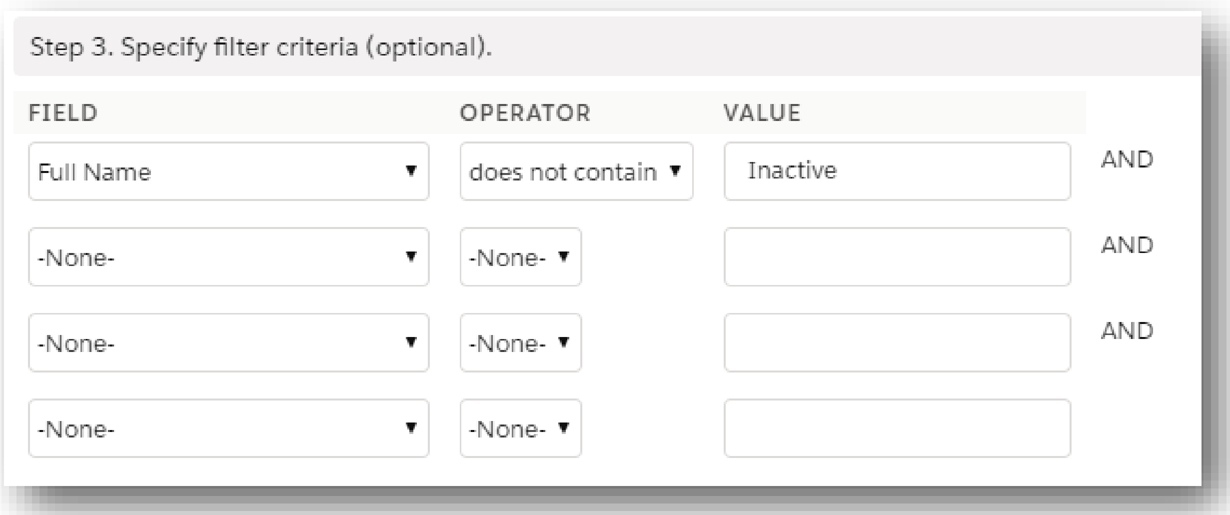
A more readable name for the component field should be entered as the value in the Label field. The value will be used as the default Column Heading.

Display Type

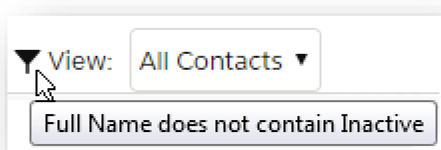
The Display Type list is used to specify the data type of the component field entered in the **Field** input control. The value you select from this list must be the data type used when the field was defined.

> To add a field to the Selected Fields list using the <Advanced> option, fill in all required fields, and then select the **Add** button.

5. In the next section, you can optionally define criteria by which to filter the contents of the tab. For example, on the Contacts tab, you may want to exclude Contacts whose name contains the word 'Inactive' (since this is the mechanism you use to identify those contacts no longer associated with a specific account). Such a filter would be defined as follows:

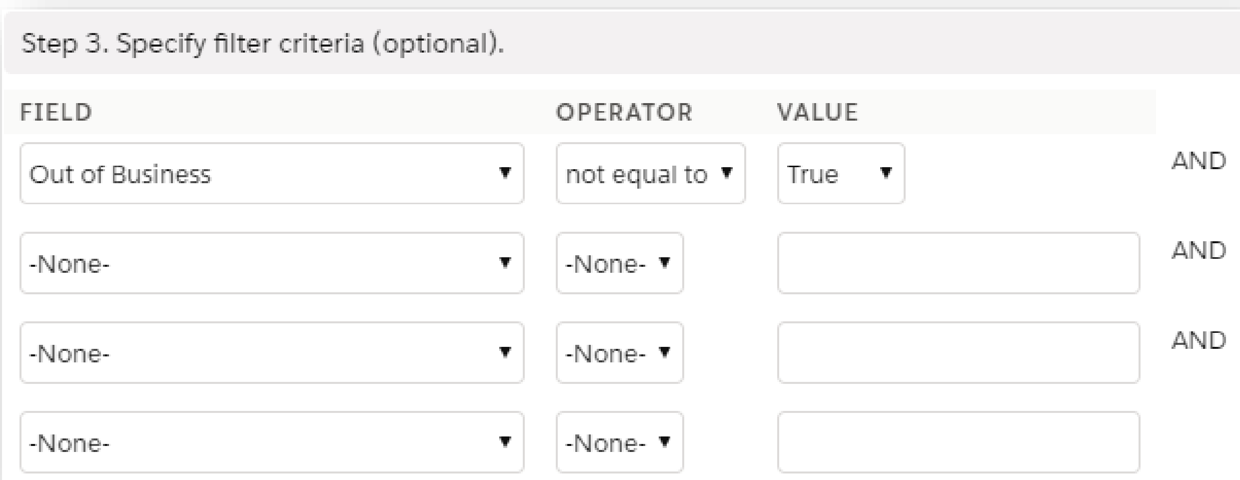


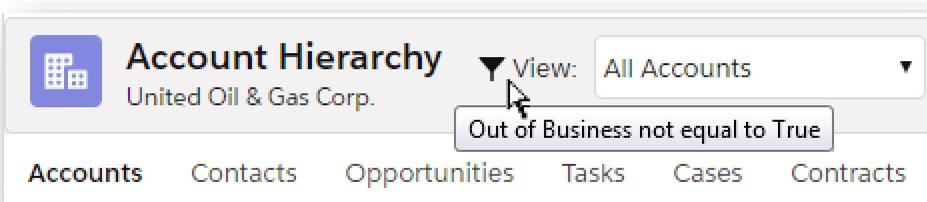
When a filter is defined for a tab, a 'funnel' image will display in the upper left hand corner of tab. To view the criteria definition, move the mouse pointer over the funnel. A pop-up text box will display with the filter criteria information.



As of version 4.8, the iTools Accounts Tab now supports Tab Filter criteria and Tab Views, similar to the other related object tabs. When applied, an Account Tab filter and selected Tab View will impact the display in the following ways:

- Any account that does not meet the filter and/or tab view criteria will not be displayed in the hierarchy. In addition, any related object records for those accounts not displayed, will not be included on the related object tabs.
- All child accounts that meet the filter and tab view criteria will be displayed in the hierarchy view, even though their parent account may not be displayed. If a parent account is filtered out of the display, their child accounts will be sorted to the bottom of the hierarchy of accounts.
- Unlike the related object tabs, the Tab filter and Tab View display and selection fields for the Accounts Tab are shown at the top of the account hierarchy page rather than on the Accounts tab itself. This provides the visibility and accessibility to the filters which are applied across all tabs.





For instructions and information regarding filter criteria definition, see the Build Effective Filters section.

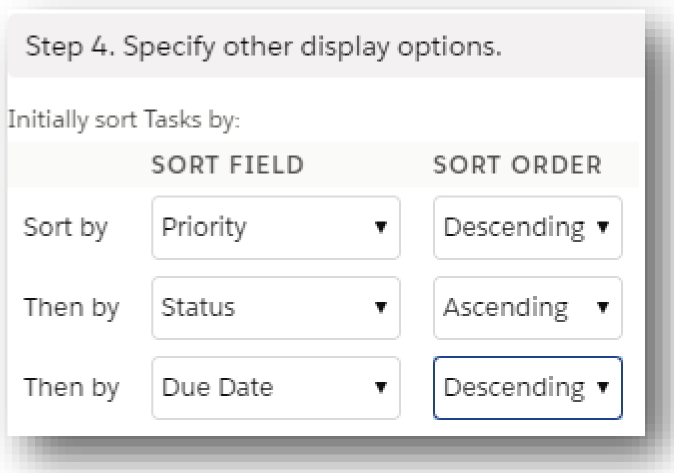
6. In the next section, other display options such as sort order and number of items per page are specified.

Initially Sort by

The **Sort Field** drop-down list is used to select the component field that should be used as the default sort. The list contains all entries in the Selected Fields list. You can select up to 3 fields for the default sort.

Sort Order

The **Sort Order** drop-down list is used in conjunction with the value selected in the **Sort Field** list to determine the order (Ascending or Descending) by which the items should be initially sorted on the component tab.



When initially displayed, the tab will sort the data on the tab based on the order of the designated sort fields. The user can choose to change the sort order by clicking on the heading name for any of the columns. The following rules are applied when a sort is changed from its initial default order:

- If the column that is currently the Primary sort (first in the list of sort fields) is clicked, then the Sort Order of the Primary sort will be flipped – from Descending to Ascending or Ascending to Descending.

- If the column that is currently the Secondary sort is clicked, the Secondary sort field will become the Primary sort and the Primary sort will become the Secondary sort. The current Sort Order will be retained for all sort fields.
- If the column that is currently the Tertiary sort is clicked, the tertiary field will become the Primary sort, the Primary sort will become the Secondary sort and the Secondary sort will become the Tertiary sort.
- If the column that is currently not designated as a sort field is clicked, that sort field will become the Primary sort, the Primary sort will become the Secondary sort and the Secondary sort will become the Tertiary sort.

Number of items per page

The **Number of items per page** specifies the maximum number of items shown per page on the component tab of the Account Hierarchy view. The default value is 20.

Keep hierarchical view when sorting on a column other than Account Name

This checkbox is only displayed when editing the AccountComponent Setting. If checked, the accounts displayed on the Accounts tab are sorted ***within*** their parent account and the hierarchical view is maintained. This display makes it easy to view and compare information for accounts at the same 'level' in the hierarchy. For example, if the checkbox is checked and the **City** field is set as the current sort field, the view appears as follows:

ACCOUNT NAME	ACCOUNT TYPE	CITY ▲
⌄ United Oil & Gas Corp. ★	Customer - Direct	Chicago
⌄ United Oil & Gas South America	Customer - Channel	
UO&G, Brazil	Customer - Channel	Brasilia
UO&G, Argentina	Prospect	Buenos Aires
UO&G, Venezuela	Customer - Channel	Caracas
⌄ United Oil & Gas Exploration Services	Prospect	Houston
UO&G Drilling Institute	Prospect	Chicago
⌄ UO&G Drilling Equipment	Prospect	New York
UO&G DE Asia	Prospect	Chicago
UO&G DE North America	Prospect	Denver
UO&G DE Europe	Customer - Channel	London
UO&G DE South America	Prospect	Rio de Janeiro
United Oil & Gas UK	Customer - Channel	London
UO&G Financial Services	Prospect	New York

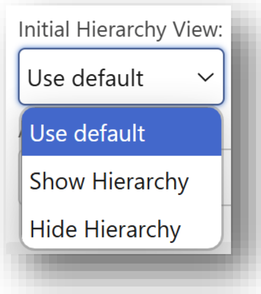
If left unchecked, then the Accounts tab sorts ***across all*** accounts in the list and the hierarchy view is not maintained. This 'flattened' list of accounts makes it easy to view and compare information across all accounts in a family of accounts. When the hierarchical sort checkbox is unchecked and the 'City' field is set as the current sort field, the view appears as follows:

ACCOUNT NAME	ACCOUNT TYPE	CITY ▲
United Oil & Gas South America	Customer - Channel	
UO&G, Brazil	Customer - Channel	Brasilia
UO&G, Argentina	Prospect	Buenos Aires
UO&G, Venezuela	Customer - Channel	Caracas
United Oil & Gas Corp. ★	Customer - Direct	Chicago
UO&G DE Asia	Prospect	Chicago
UO&G Drilling Institute	Prospect	Chicago
UO&G DE North America	Prospect	Denver
United Oil & Gas Exploration Services	Prospect	Houston
United Oil & Gas Hong Kong	Customer - Channel	Kowloon
United Oil & Gas UK	Customer - Channel	London
UO&G DE Europe	Customer - Channel	London
UO&G Drilling Equipment	Prospect	New York
UO&G Financial Services	Prospect	New York

To return the Account Hierarchy view back to the original hierarchy display, sorted by Account Name, simply click on the Account Name column.

Initial Hierarchy View

This display option, which will appear for all component tabs ***except*** the Accounts tab, allows a site to determine whether the information on the tab should **initially** display in a hierarchical or non-hierarchical (flat) view. The picklist options are:



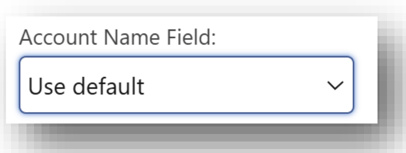
- Use default: The Initial Hierarchy View will be determined by the value selected in the 'InitialHierarchyView' iTools setting located in the View section on the iTools Settings Tab. See the 'InitialHierarchyView' setting for more information.
- Show Hierarchy: The information on the tab will be initially displayed in a hierarchical view.
- Hide Hierarchy: The information on the tab will be initially displayed in a non-hierarchical (flat) view.

Account Name Field

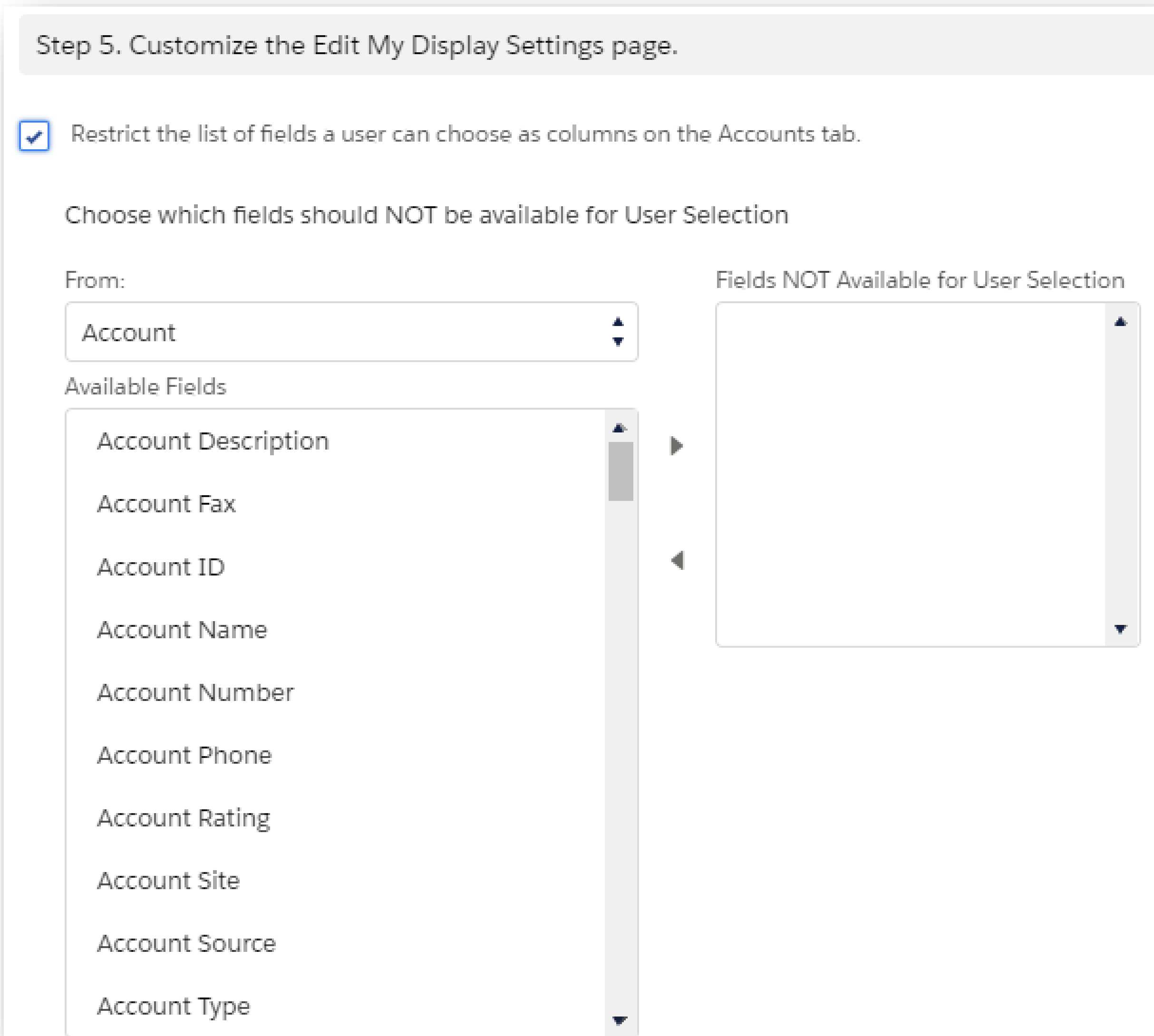
This display option allows sites to define which field should be used as the **'Account Name' (first column) field** for all **component tabs**, except the **Accounts tab**.

- **Select Any Available Account Field** – Choose from all available **Account fields** to display as the **Account Name** in component tabs.
- **Use Default Option** – Selecting **'Use Default'** will automatically assign the **Account Name field** based on the value set in the **'AcctNameFld'** iTools setting, found in the **Account section** of the **iTools Settings Tab**.

For more details on how the default **Account Name field** is determined, refer to the **AcctNameFld** setting in iTools.

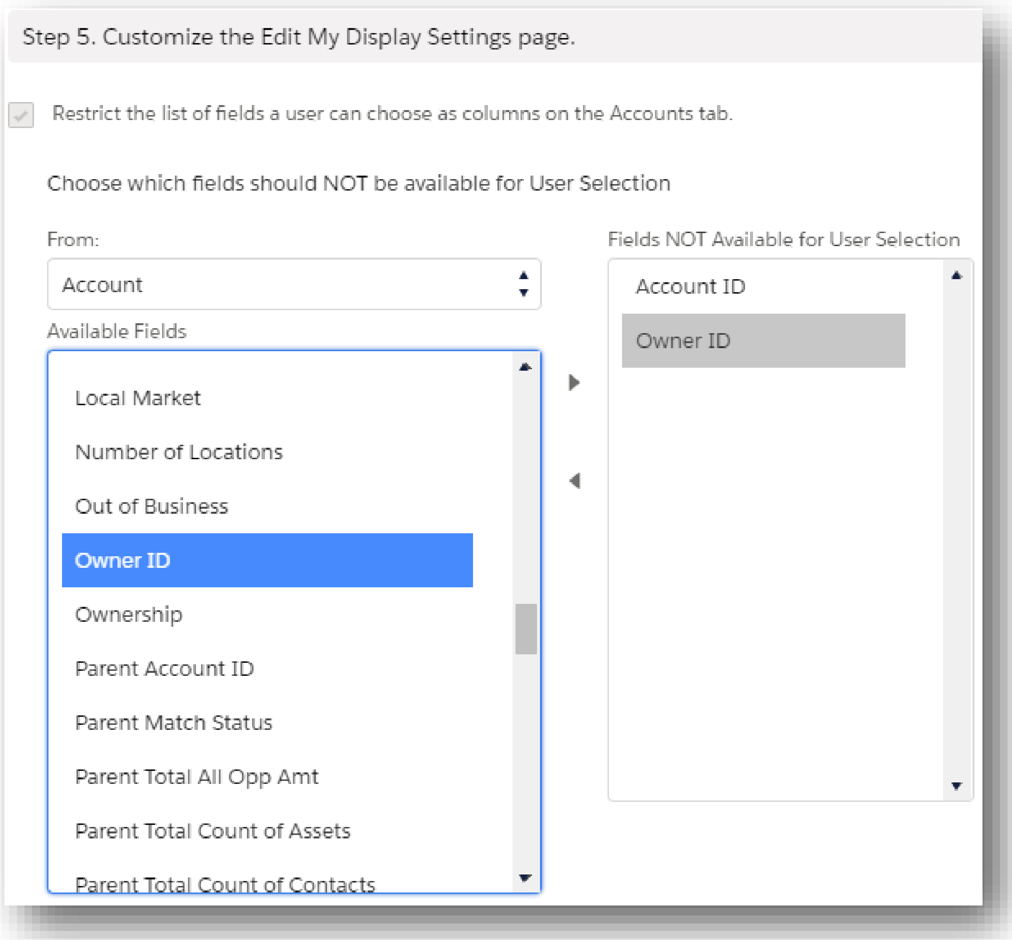


7. In the final section, display options used when the **Edit My Display Settings** feature is enabled are specified. To learn more about the **Edit My Display Settings** feature, go to the *AllowEditMySettings* section later on in the guide.
    a. Check the '**Restrict the list of fields….**' checkbox if you want to limit the fields from which a user can choose as columns on the tab. When the checkbox is checked, then additional options will be displayed.

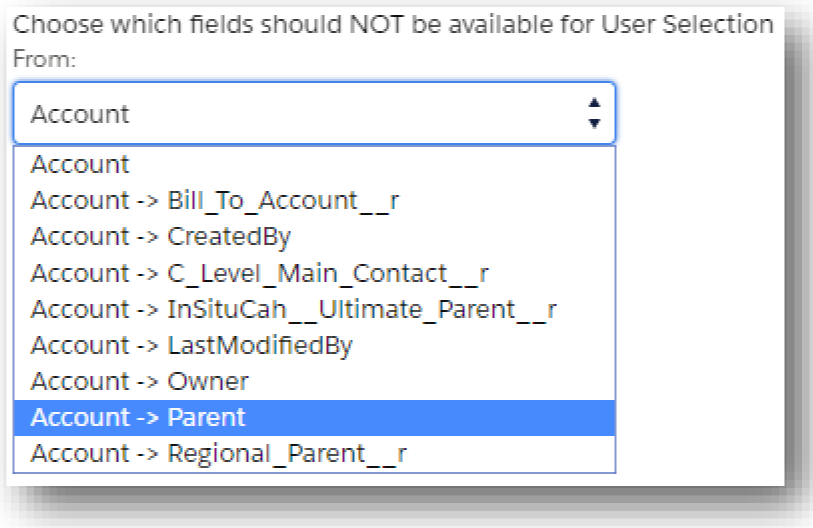


For general usability or administrative purposes, there may be certain fields that should not be available for selection by the user when they click the **Edit My Display Settings** link on the current tab on the iTools Account Hierarchy view. Keep in mind that the iTools Account Hierarchy respects the access security set up in Salesforce and will only display information the user has been permitted to read.

a. To add a field to the list of **Fields NOT Available for User Selection**, select the field in the list on the left and then click the **Add** button. When all the field selections have been made, click **Save.** In the example below, two fields (Account ID and Owner ID) have been selected.

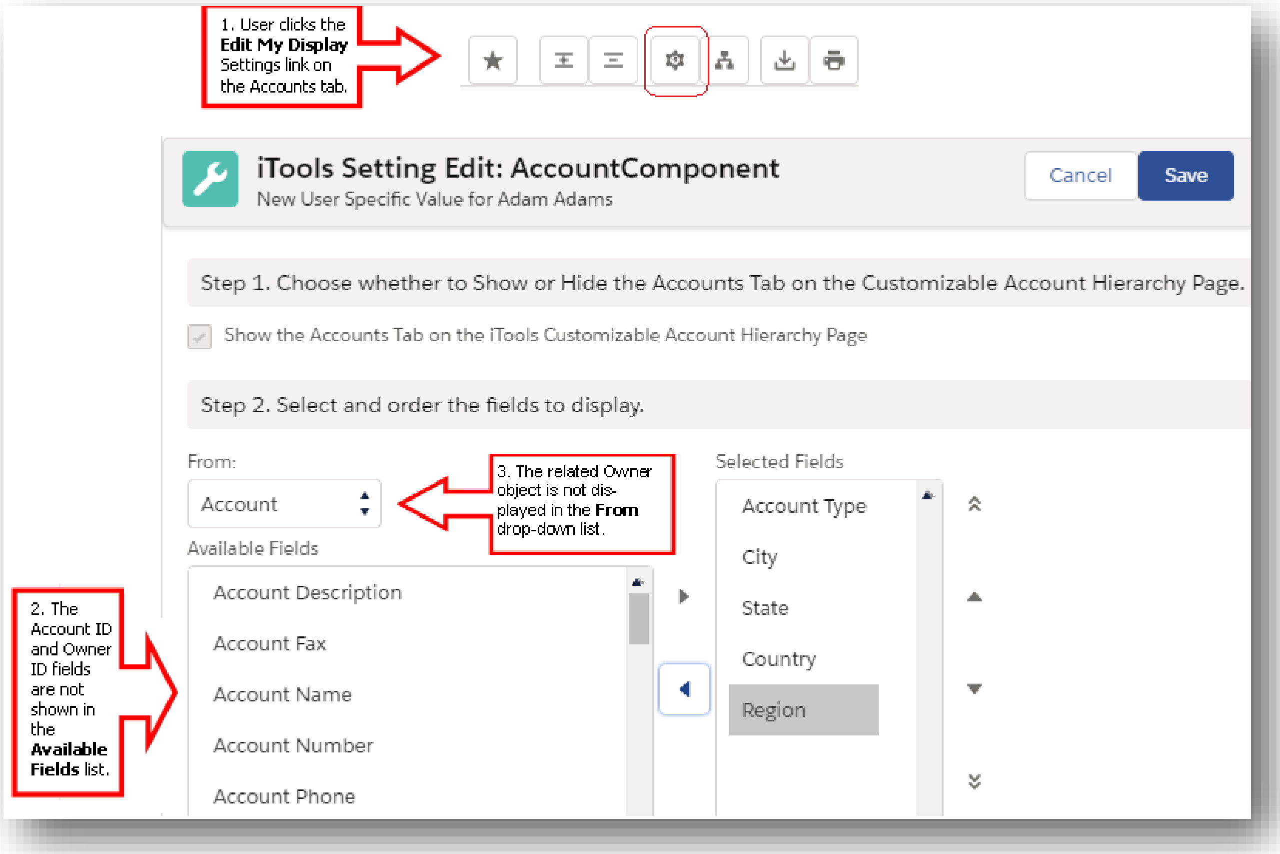


Note 1: To select fields from a related object (such as the Parent Account), select the object in the **From:** drop-down list. The list of fields below will be updated to show those fields for the selected related object. From there, add the fields to the list on the right in the same manner as described in step b.



Note 2: If you don't want the user to select ***any*** fields from a particular related object, select the associated reference field in the list and add it to the list on the right. In the example above, since the Owner ID field is the reference field for the related Owner object, the user will not be able to choose any field from the owner object when customizing the Accounts tab on the iTools Account Hierarchy.

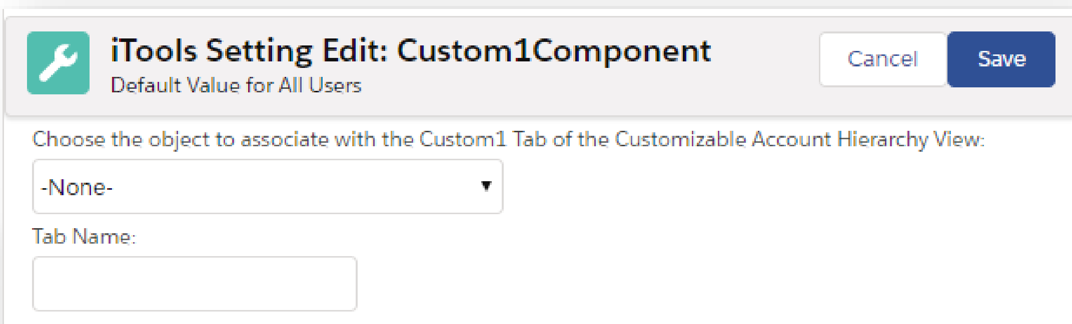
b. Based on the example selections above, the results will be as follows:



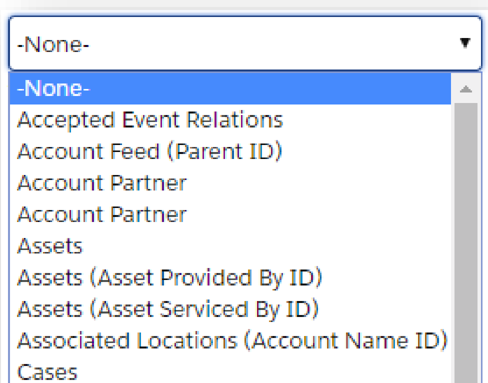
Custom*N*Component

The eight Custom*N*Component Settings allow you to configure additional tabs for any related standard or custom object. The '*N*' refers to the actual number, 1 through 8, for the specific component setting (ex. Custom1Component, Custom2Component). The same interface used to configure the ObjectComponent setting is used to configure the Custom*N*Component settings with only a few minor additional steps required.

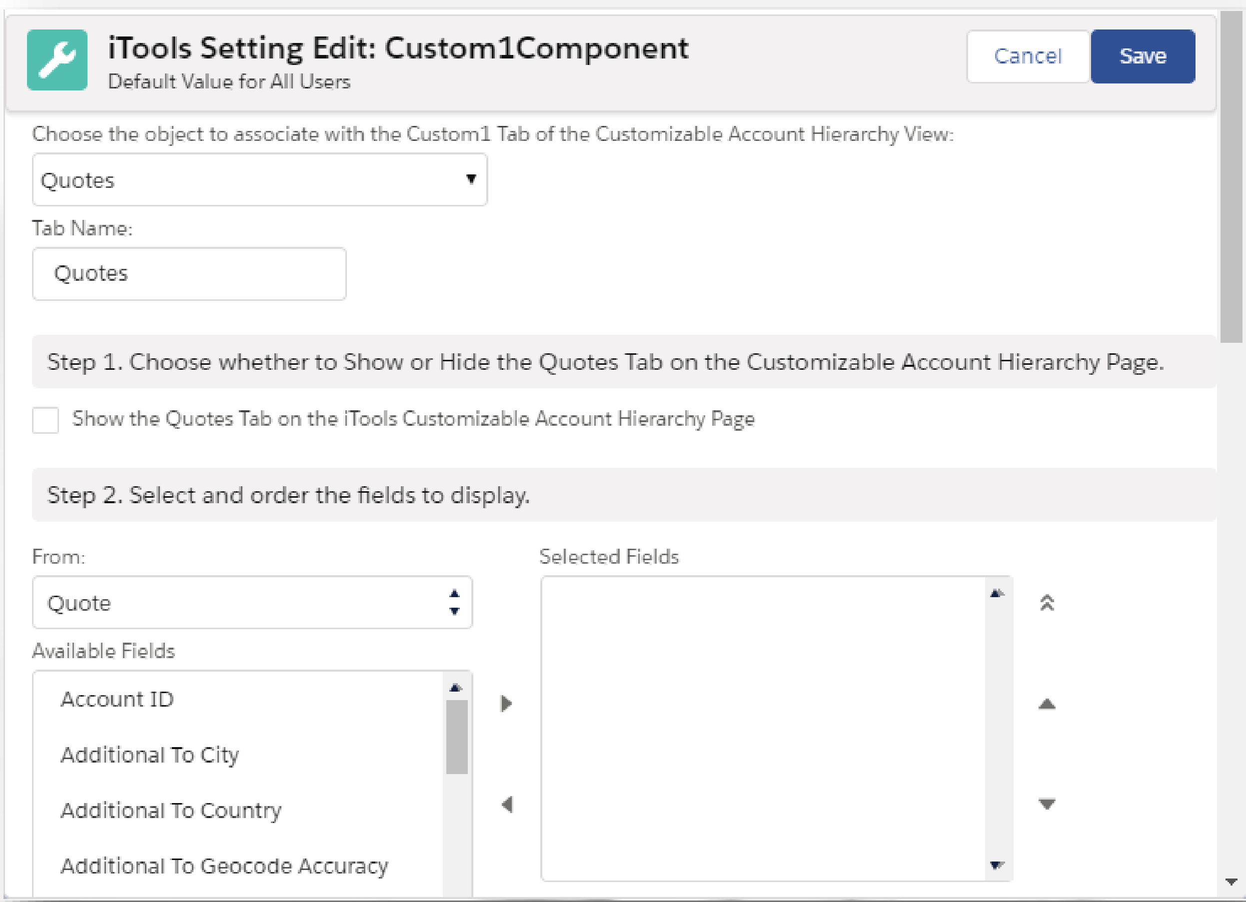
1. When the iTools Setting Edit page initially displays, a special **Custom Tab** section is shown while all other sections are hidden. This **Custom Tab** section is used to specify the related object to associate with the custom tab as well as the name you want displayed as the Tab Label.



The contents of the drop-down list will vary based on your specific Salesforce org configuration and the features that have been enabled, products installed and custom objects created. The list is populated with all objects that have defined a Master-Detail or Lookup relationship to the Account object. In the case of a Lookup relationship, the lookup relationship field is displayed in parenthesis after the name of the object.



After you select an item, the page will update and the remaining sections will display:



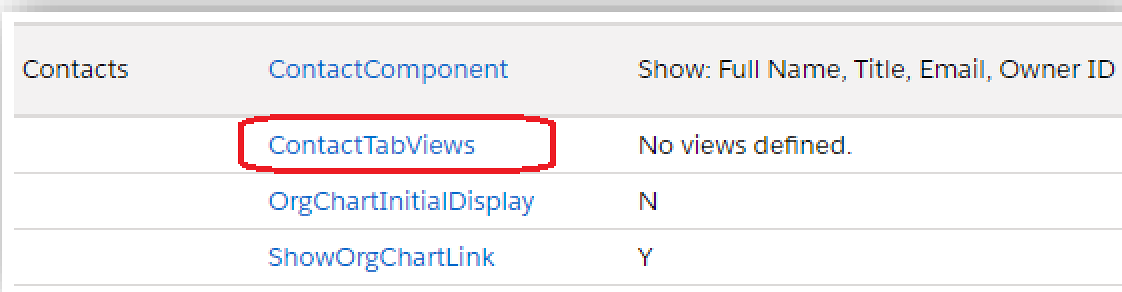
2. The Tab Name field will automatically be filled with the name of the selected object. The name can be changed to any value that best describes the contents of the tab.
3. By default, the **Show** checkbox is unchecked. To show the custom tab in the iTools Account Hierarchy view, check the **Show** checkbox in Step 1.
4. Complete your selections in Steps 2 and 3 in the same manner a standard component tab.

*Object*TabViews

There are sixteen different ***Object*TabViews** settings - seven settings for seven standard object component tabs (Account, Case, Contact, Contract, Event, Opportunity and Task), eight for the custom component tabs (Custom1 – Custom8) and one for the Explorer View. Similar to the Salesforce List Views, the ***Object*TabViews** setting allows you to create a list of tab views to see a specific set of account hierarchy related records. When you installed iTools Customizable Account Hierarchy, the system automatically created a number of TabViews for objects such as Cases, Events, Opportunities and Tasks.

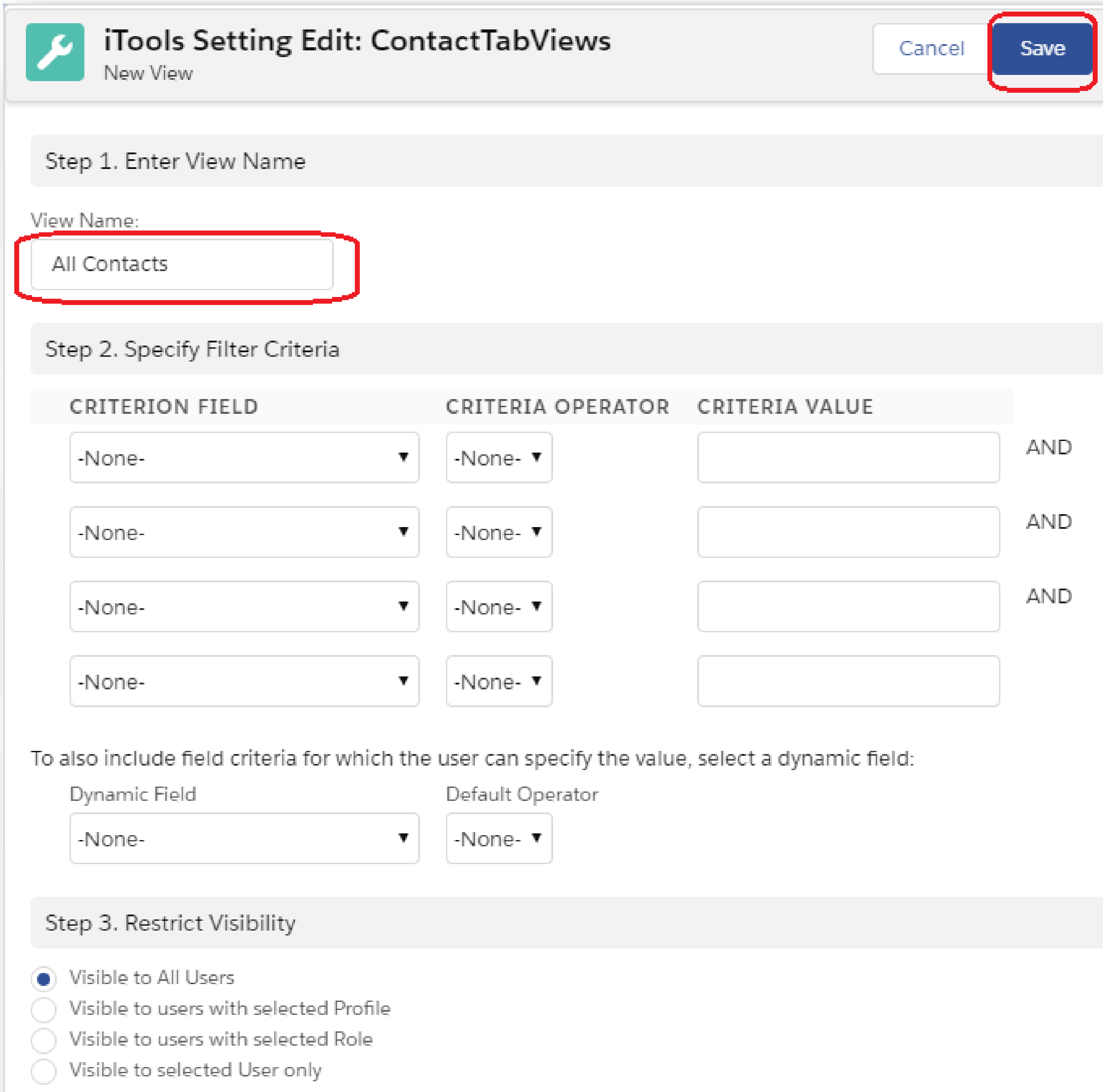
To create a set of *Object*TabViews, follow the instructions below:

1. Select the ***Object*TabViews** Setting name in the list of settings for the Customizable Account Hierarchy iTool. For this example, the **ContactTabViews** setting was chosen.

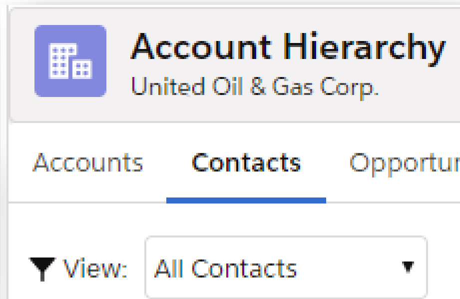


Contacts	ContactComponent	Show: Full Name, Title, Email, Owner ID
	ContactTabViews	No views defined.
	OrgChartInitialDisplay	N
	ShowOrgChartLink	Y

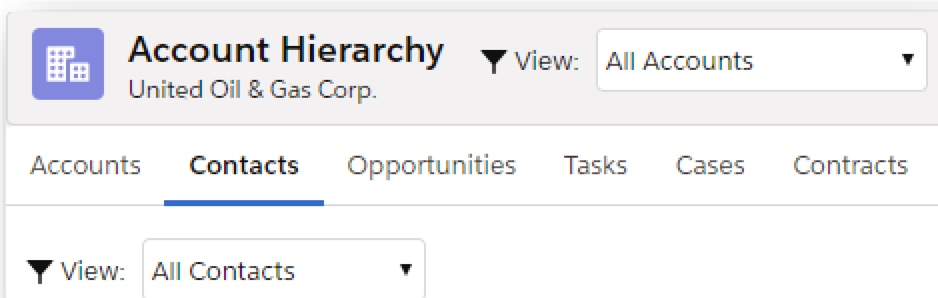
2. Select Edit in the **Value for All Users** section of the **ContactTabViews** page.
3. To create a new list view, click the **New** button on the **Views for the Contact Tab** page.
4. When creating list views for a tab, it is highly recommended to create one Tab View without any criteria defined. This will allow your users to have a view that shows all related objects for all the accounts within the current hierarchy. To create such a view, enter only the View Name and click **'Save'.**


iTools Setting Edit: ContactTabViews
New View
Cancel
Save
Step 1. Enter View Name
View Name:
All Contacts
Step 2. Specify Filter Criteria
CRITERION FIELD
CRITERIA OPERATOR
CRITERIA VALUE
-None-
AND
To also include field criteria for which the user can specify the value, select a dynamic field:
Dynamic Field
Default Operator
Step 3. Restrict Visibility
Visible to All Users
Visible to users with selected Profile
Visible to users with selected Role
Visible to selected User only

When there is at least one Tab View defined, then a drop-down list of Tab Views will be displayed in the upper left hand corner of the associated tab:



Unlike the related object tabs, the Tab filter and Tab View display and selection fields for the Accounts Tab are shown at the top of the account hierarchy page rather than on the Accounts tab itself. This provides the visibility and accessibility to the filters which are applied across all tabs.

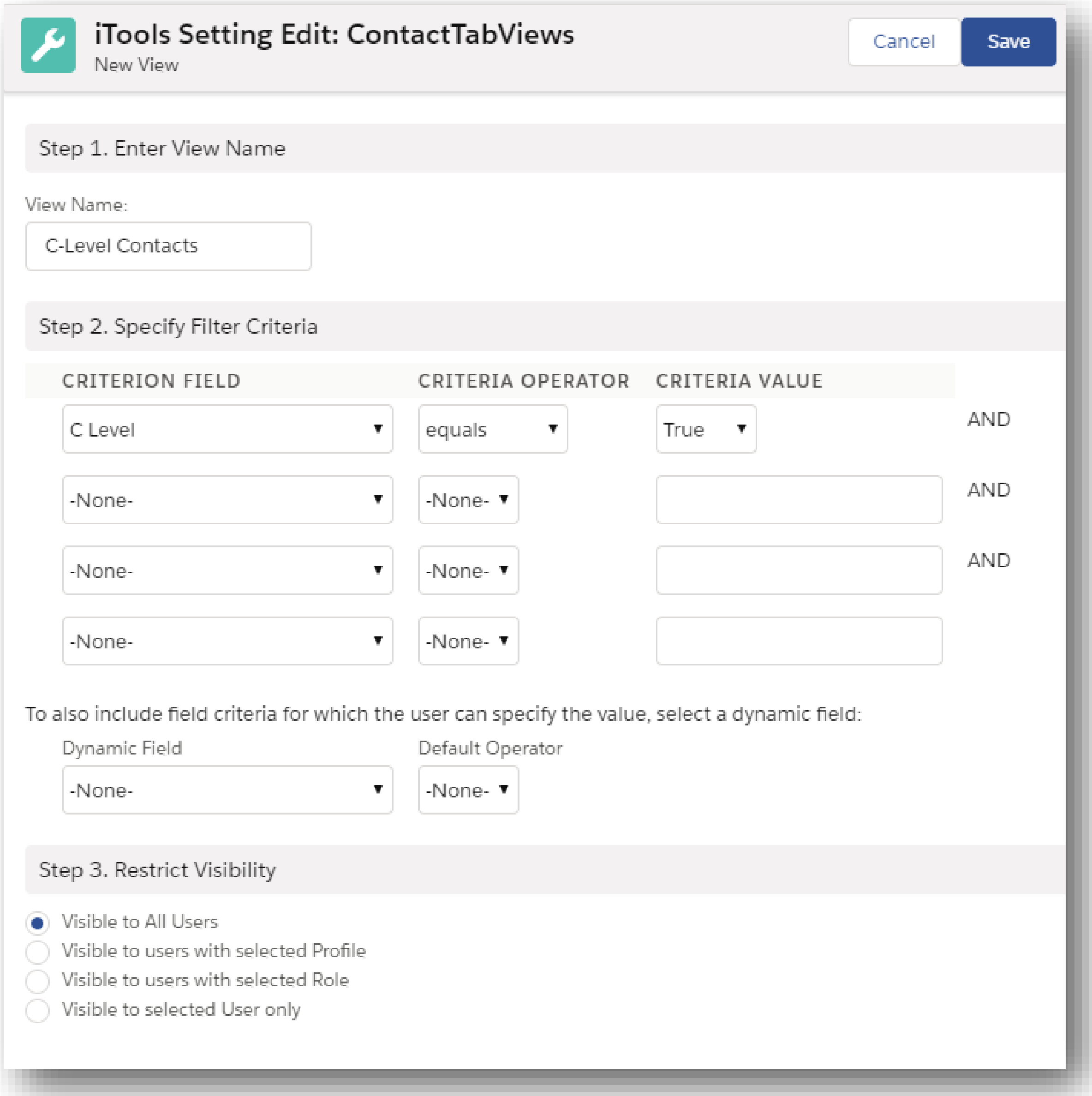


Also note the follow rules applied when an Account View is selected:

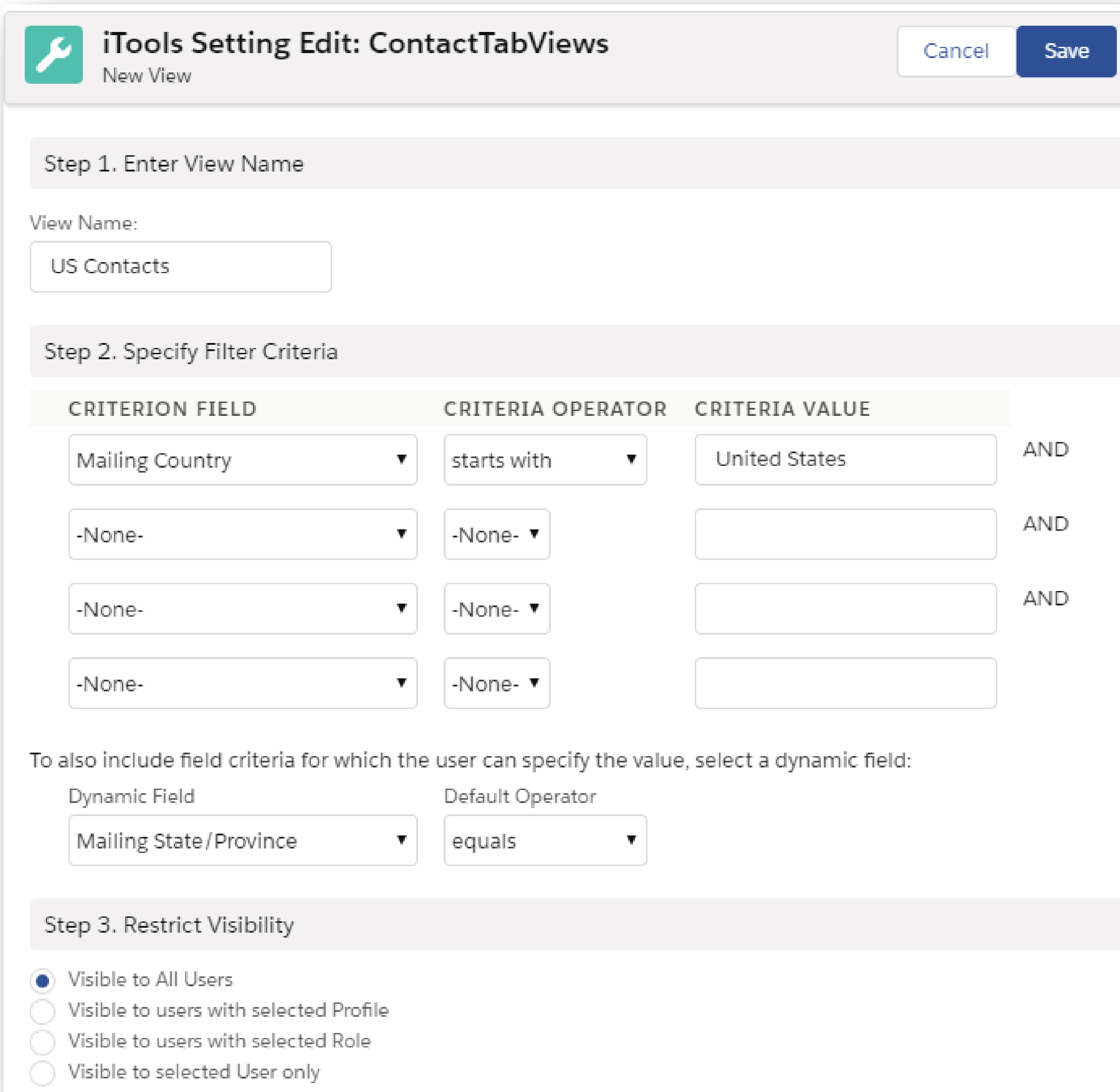
- Any account that does not meet the filter and/or tab view criteria will not be displayed in the hierarchy. In addition, any related object records for those accounts not displayed, will not be included on the related object tabs.
- All child accounts that meet the filter and tab view criteria will be displayed in the hierarchy view, even though their parent account may not be displayed. If a parent account is filtered out of the display, their child accounts will be sorted to the bottom of the hierarchy of accounts.

5. To create additional List Views for the Contacts tab, click the **New** button again and enter criteria that best matches your needs.

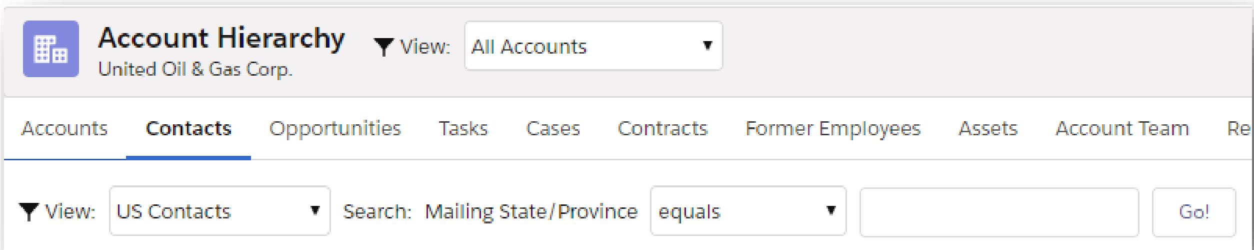
   Example: If you have a custom checkbox field that is used to designate ‘C-Level’ contacts, you can create a ‘C-Level’ filter by entering the following:



Example: To create a tab view that would allow a user to dynamically filter US Contacts by their State value, define a tab view as follows:



When the Tab View is selected, the following will display at the top of the Contacts Tab:

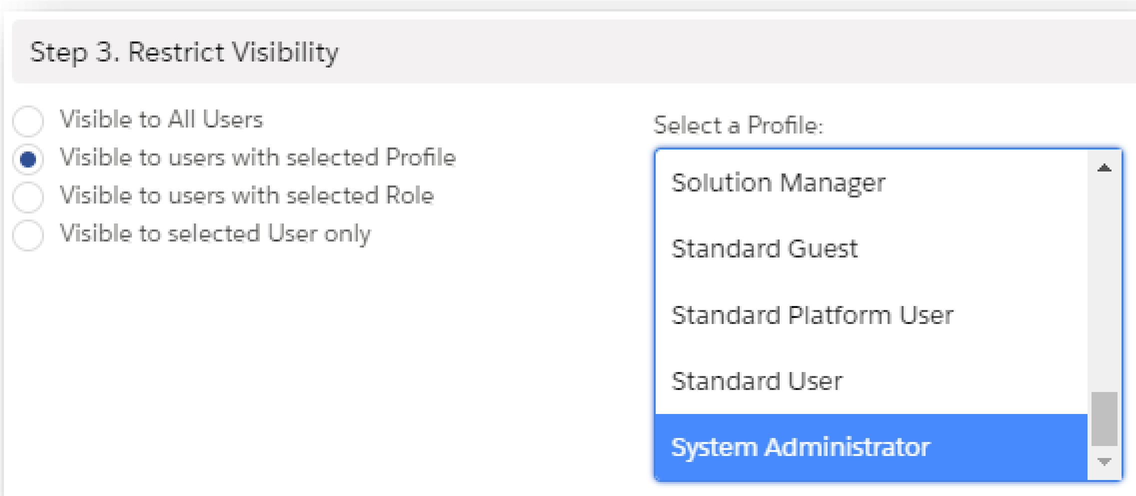


To filter for all Contacts in the state of Illinois, enter ‘IL’ in the text field and click ‘**Go**’.

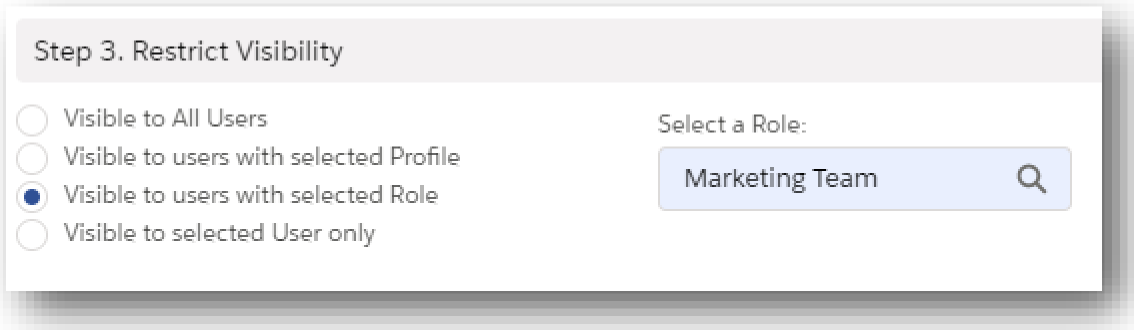
For instructions and information regarding filter criteria definition, see the Build Effective Filters section.

6. To restrict the visibility of a Tab View by Profile, Role or individual user, select the appropriate option in the **Step 3: Restrict Visibility** section of the page.

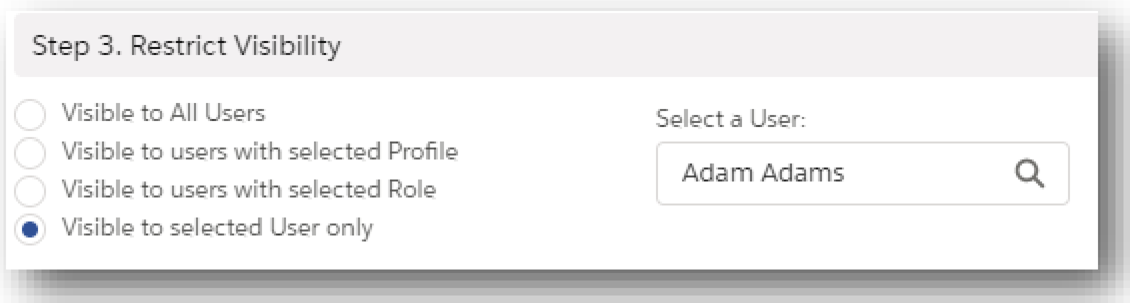
   Example: Only show this Tab View for System Administrator users:



Example: Only show this Tab View to users with Marketing Team role:

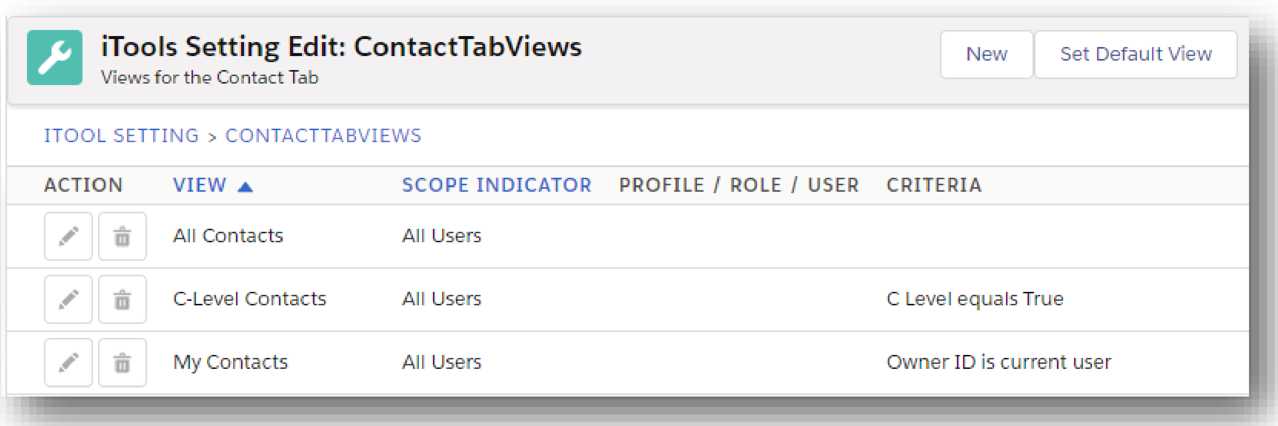


Example: Only show this Tab View to user Adam Adams:



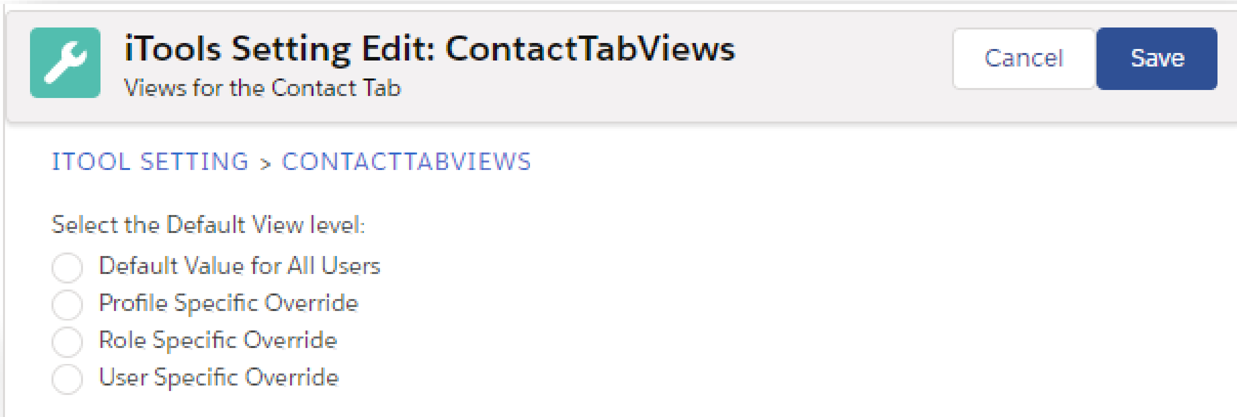
To **edit** or **delete** a tab view,

1. Go the ***Object*TabViews** Setting and click **Edit** button.
2. On the **Views for the *Object* Tab** page, click the **Edit** or **Delete** button next to the View you would like to Edit or Delete.



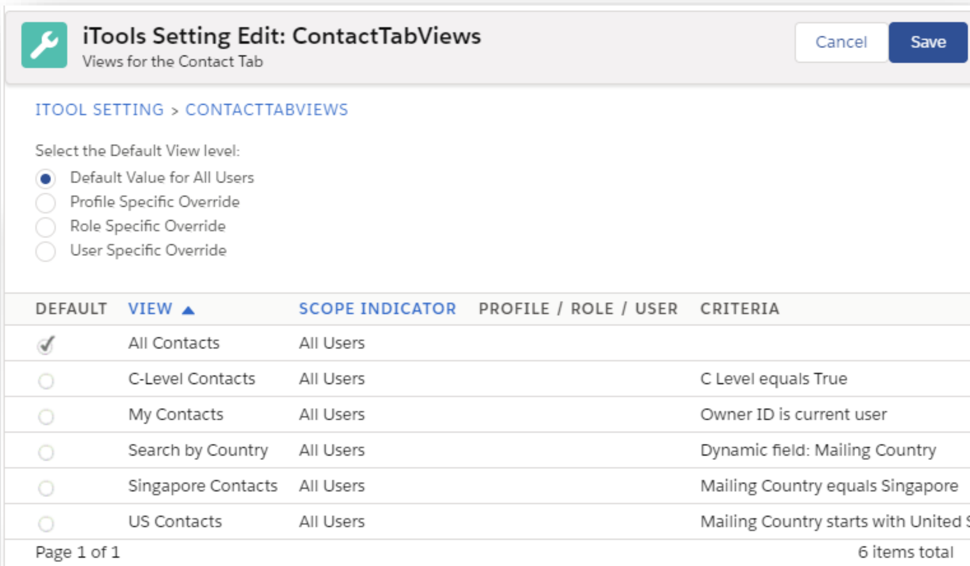
To **set the default view** that is selected in the drop-down list when the tab is initially displayed in the iTools Account Hierarchy view,

1. Go the ***Object*TabViews** Setting and click **Edit** button.
2. Click the **Set Default View** button.
3. On the page that displays, select the level for which you would like to set the Default view. You can select a default view that applies to **All Users,** users with a specific **Profile** or just an individual **User**.

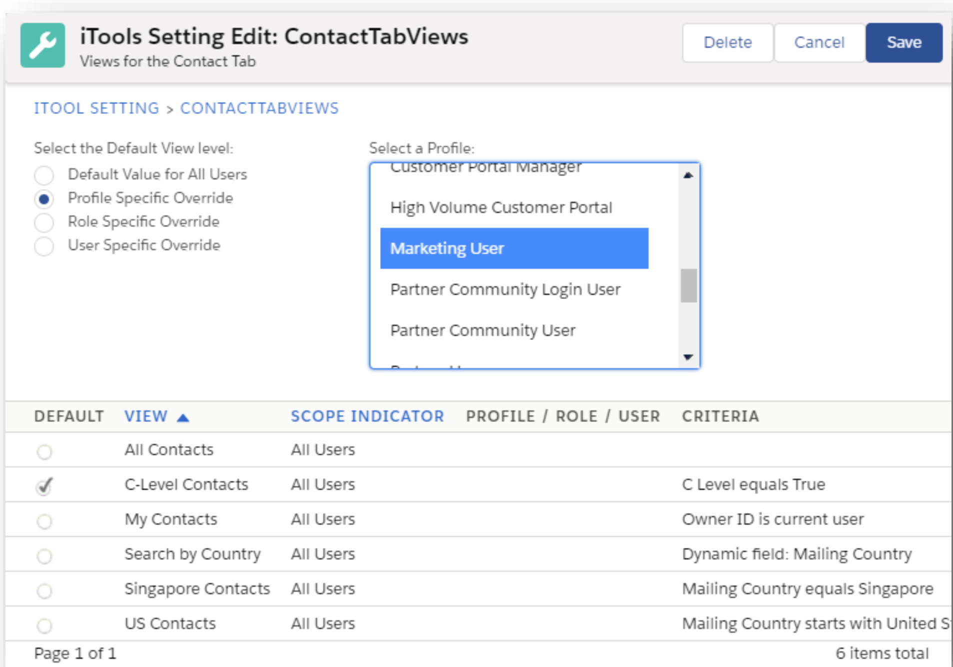


4. Then, chose the specific view by checking the option in the **Default** column next to the view.

Example: Set the **All Contacts** view to be the default Tab View selected for the Contacts Tab for all users.



Example: Set the **C-Level Contacts** view to be the default Tab View selected for the Contacts Tab for users with the **Marketing User** profile.



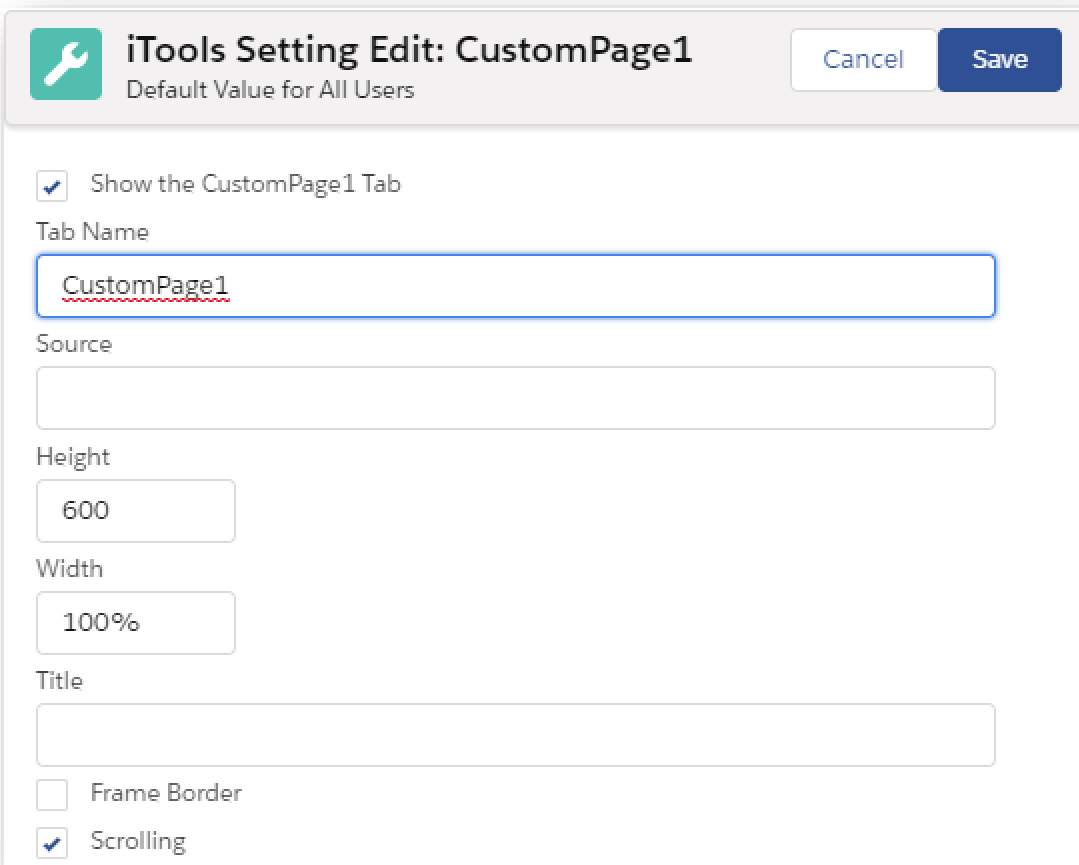
Note:

- When a Profile Specific Override is defined, the Profile Specific Override view will be used as the default for all users with the specified profile – even when a Default Value for All Users view has been defined.
- When a Role Specific Override is defined, the Role Specific Override view will be used as the default for the specified user – even when a Default Value for All Users or Profile Specific Override has been defined.
- When a User Specific Override is defined, the User Specific Override view will be used as the default for the specified user – even when a Default Value for All Users, Profile Specific Override or Role Specific Override has been defined.

5. Click **Save**.

CustomPage*N*

The six CustomPage*N* Settings allow you to configure additional tabs to include custom VisualForce or website pages directly in the iTools Account Hierarchy view. Use CustomPage tabs when you have unique display requirements or just want to add some sizzle to the view.



CustomPage attributes are similar to those used to configure an <apex:iframe> component.

Show the CustomPage1 Tab - Check the box to Show the tab on the Account Hierarchy Page.

Source – The URL that specifies the initial contents of the page. This URL can either be an external website, or another page in Salesforce.

Height - Specify the height of the page, expressed either as a percentage of the total available vertical space (for example, 50%), or as the number of pixels (for example, 300px). If not specified, this value defaults to 600px.

Width - The width of the page, expressed either as a percentage of the total available horizontal space (for example, 80%), or as the number of pixels (for example, 600px). If not specified, this value defaults to 100%.

Title – The text to display as a tooltip when a user's mouse pointer hovers over the page.

Frame Border - Check the box to display a border around the page.

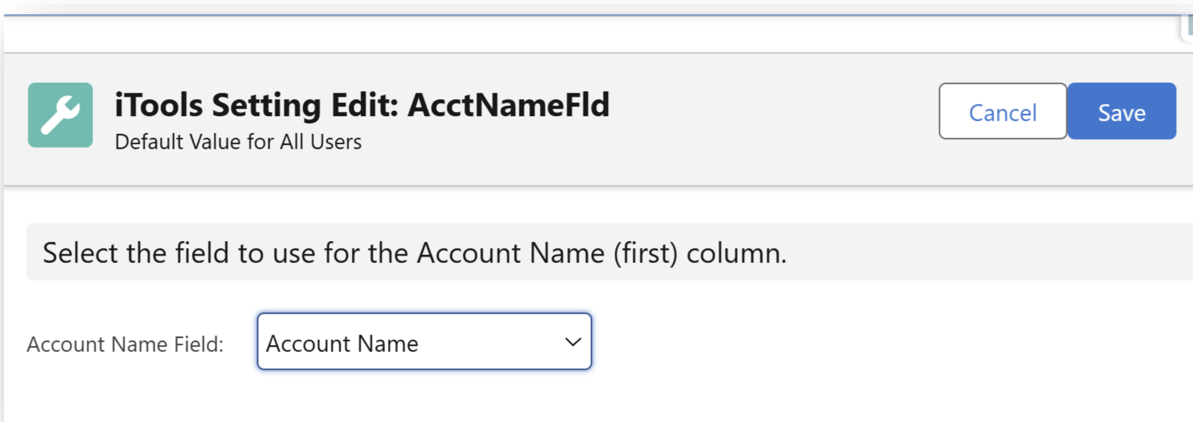
Scrolling – Check the box to allow the contents of the page to be scrolled.

AcctNameFld

In versions prior to 5.10, the iTools Account Hierarchy automatically displayed the Account Name as the first column across all tabs. With the latest update, you now have the flexibility to customize which field appears as the first column in the hierarchy view. This setting enables you to choose a field that best suits your needs, with the recommendation to select a field that contains unique values across all accounts for optimal clarity.

This feature was introduced in response to customer feedback, particularly from those who maintain alternate names for accounts—such as Site Name, Abbreviated Name, or Commonly Known As.

Click this iTools Settings link to access the custom **AcctNameFld** page.



The AcctNameFld picklist includes all fields associated with an Account, allowing you to select the default field to display across all iTools Account Hierarchy tabs.

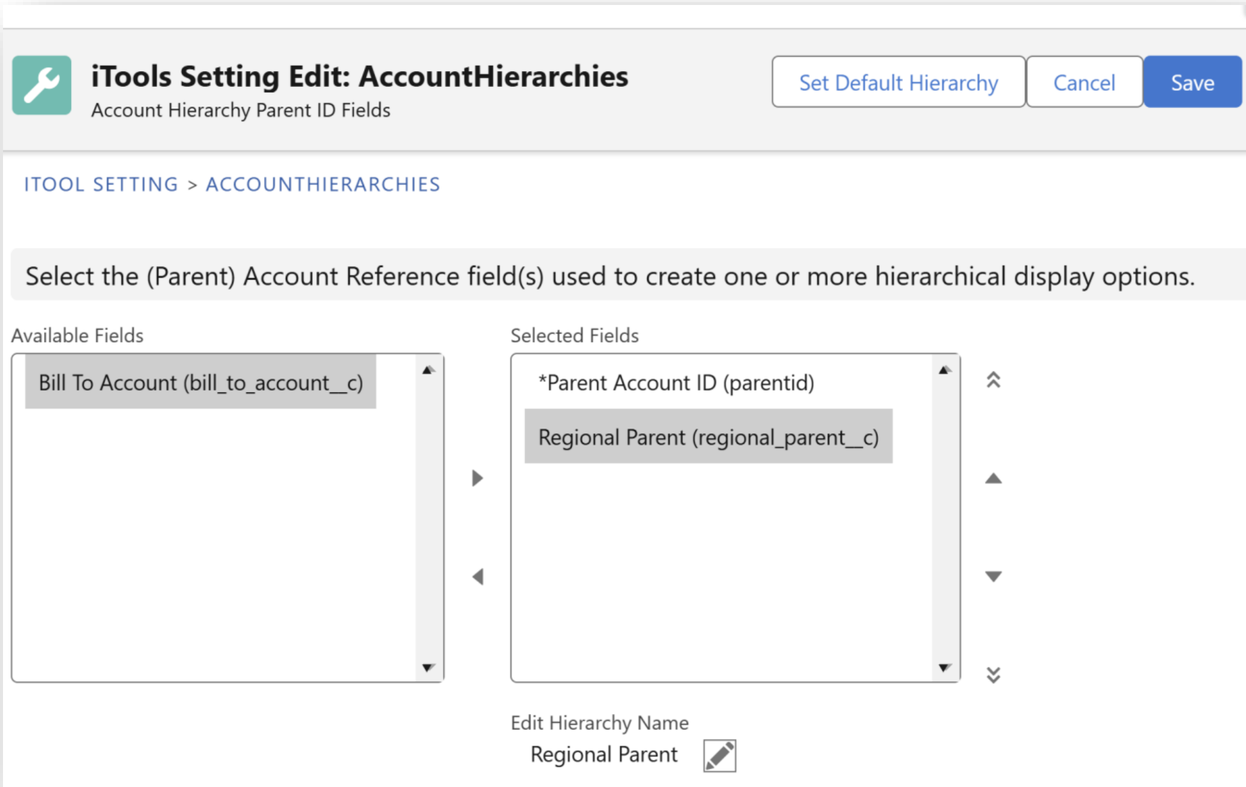
If you need to customize the display for a specific tab, you can easily override the default selection. Simply use the Account Name Field option within the Component settings for the designated tab to specify a different field for that tab's display.

AccountHierarchies

With the **Multiple Alternate Hierarchies** feature, you can create multiple, tailored hierarchical views of an Account Family. This is done by assigning and maintaining additional Account lookup fields to establish parent-child relationships.

By leveraging alternate hierarchies, you can present account structures that reflect different business contexts, such as legal entities, business units, geographic regions, sales structures, and more. This flexibility allows you to visualize your account hierarchy in ways that align with your company's unique organizational and operational needs.

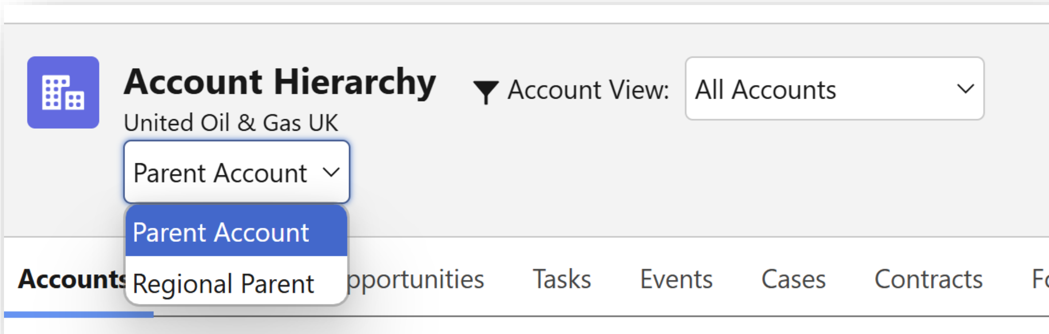
Click this iTools Settings link to access the custom **AccountHierarchies** page.



Configuring the iTools Customizable Account Hierarchy for Multiple Hierarchies

Easily set up and manage multiple account hierarchies in iTools by following these steps:

1. **Select the Parent Account Reference Field:**
   - Locate the **Parent Account Reference** field in the **Available Fields** list.
   - Click the **Right Arrow** button to move it to the **Selected Fields** list.
2. **Arrange the Display Order:**
   - Use the **Up and Down Arrows** to adjust the order of **Account Reference** fields as they appear in the picklist field on the **iTools Account Hierarchy** page.
   - When there are at least two Selected Fields defined, then a drop-down list of Account Hierarchies (Parent Account Reference fields) will be displayed in the upper left hand corner of the iTools Account hierarchy view, directly below the Account Hierarchy heading and Account Name:



Important Notes:

- At least **one** account reference field **must** be included in the **Selected Fields** list.
- The reference field marked with an **asterisk (*)** is essential for constructing the **iTools Ultimate Account Parent Hierarchy** and **cannot be removed** from the list.

Customizing Field Names in the Picklist

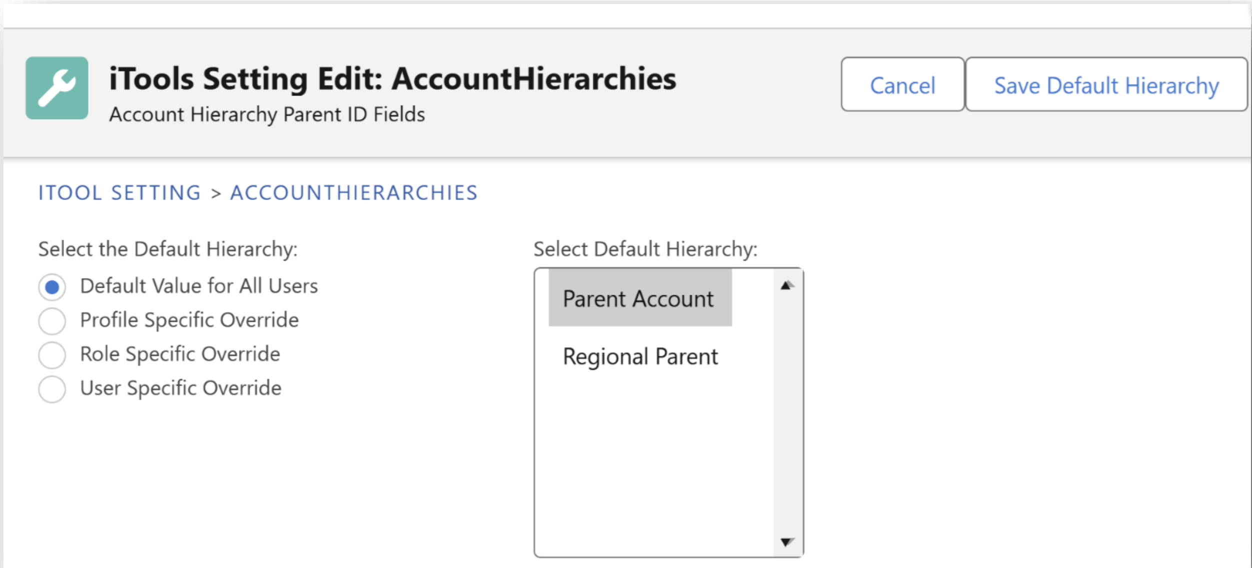
To personalize how a field name appears in the **picklist field** on the iTools Account Hierarchy page:

1. Select the field in the **Selected Fields** list.
2. Click the **pencil icon** next to the hierarchy name (located directly beneath the Selected Fields list).
3. Enter the preferred name and save your changes.

3. Click the **Save** button to save your configuration updates.

Setting the Default Hierarchy View in iTools Account Hierarchy

Customize the default hierarchy view displayed in the drop-down list on the **iTools Account Hierarchy** page by following these steps:



1. **Click the "Set Default Hierarchy" Button on the AccountHierarchies iTools Settings Page**
2. **Choose the User Group**
   - On the displayed page, select the user group to whom you want to set the default hierarchy.
   - Options include:
     - **All Users** – Applies the default view system-wide.
     - **Profile Specific Override** – Applies the default view based on the user profile.
     - **Role Specific Override** – Applies the default view based on the user role.
     - **Individual User** – Applies the default view for a specific user.
3. **Select the Default Account Reference Field**
     - From the **Select Default Hierarchy** list, choose the **Account Reference** field to be used as the default.
4. **Understand Override Priorities**
   - The system applies default views in the following order of precedence:
     - **User-Specific Override** – Takes highest priority, overriding all other settings.

- **Role-Specific Override** – Overrides both profile-specific and system-wide default views.
- **Profile-Specific Override** – Applies to all users with the selected profile, even if a system-wide default is set.

5. **Click "Save Default Hierarchy"**
    - Confirm and save your selection to apply the default hierarchy settings.

OrgChartInitialDisplay

You can control whether or not you want the Org Chart View to display by default whenever the Account Hierarchy Contacts tab is initially displayed. Choose **'Yes'** if you want the Contacts tab to show the 'Org Chart' by default. To initially show the standard display, choose **'No'.** See the *iTools Org Chart View* section of this guide for more information.

ShowOrgChartLink

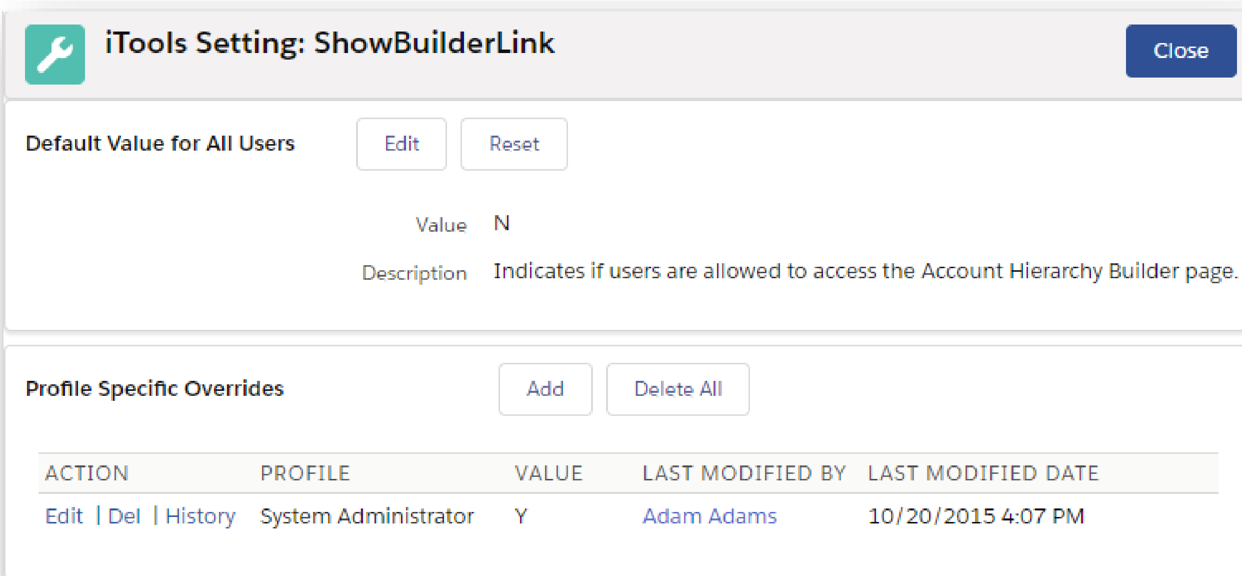
You can control whether or not you want the Org Chart link to display on the Account Hierarchy Contacts tab. If your organization uses the **ReportsTo** field on Contacts to create organization charts, then choose '**Yes**' to show the Org Chart link. If you do not use the **ReportsTo** field, then you will want to choose '**No**' to hide the link. By default, the Org Chart link is shown on the Account Hierarchy Contacts tab. See the *iTools Org Chart View* section of this guide for more information.

The next 4 new iTools Settings support the customization of the Account Hierarchy Builder page:

ShowBuilderLink

You can control whether or not you want your users to access the Account Hierarchy Builder page from the Account Hierarchy View using the iTools **ShowBuilderLink** setting. Choose **'Yes'** if you want the Account Hierarchy View to show the 'Build Hierarchy' link. With this link, a user can access the Account Hierarchy Builder page.

If you only want System Administrators to access the Account Hierarchy Builder page, then choose **'No'** as the 'Default Value for All Users' setting value. Then, select the '**Add**' button in the **Profile Specific Overrides** section. In the **iTools Setting Edit** page, choose '**Yes**' as the value and '**System Administrator**' in the Profile list to create a Profile Specific override. The iTools Setting page for the **ShowBuilderLink** should now look like this:



CriteriaFldList

The ‘Specify Filter Criteria’ section of the Account Hierarchy Builder page provides a drop-down list of Account fields from which you can select for filtering purposes. To customize the set of fields displayed in the drop-down list, you can use the iTools **CriteriaFldList** setting. By default, all standard and custom Account fields will display in the list. If your organization has a large number of custom fields or fields that are typically not used for searching/filtering purposes, then use the **CriteriaFldList** edit page to select the subset of fields that are most appropriate.

SearchResults

The ‘Search Results’ section of the Account Hierarchy Builder page uses the values entered in the Filter Criteria section to provide a list of Accounts from which you can select to add to the hierarchy. To customize the set of fields displayed as columns in the search results list, you can use the iTools **SearchResults** setting. By default, the fields defined in the **AccountComponent** setting are used. If you prefer a different set of fields to be displayed, then use the **SearchResults** edit page to select the set of fields that are most appropriate. In addition to the Account name, a maximum of 5 columns are displayed in the Search Results list.

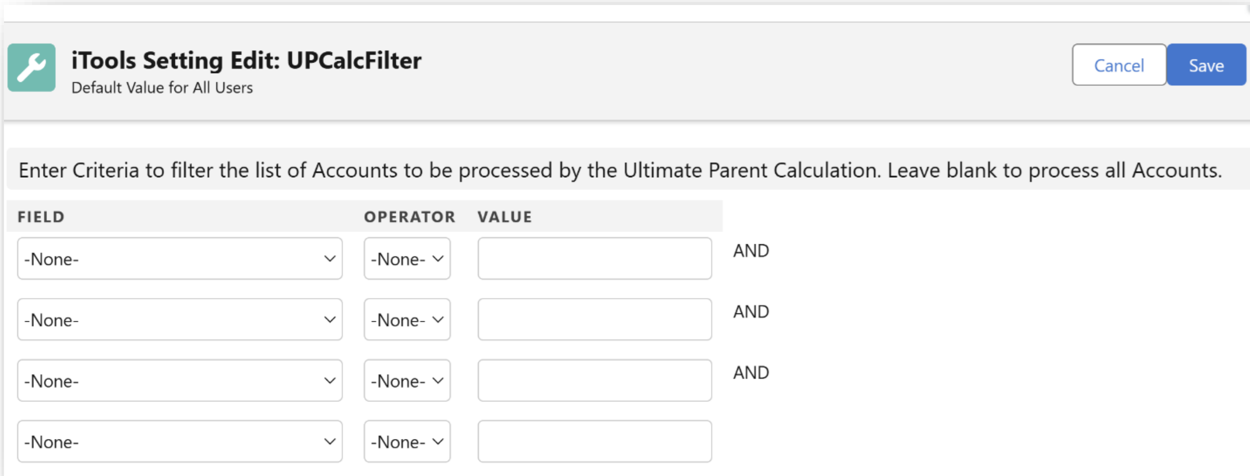
SearchResultsPageSize

The iTools **SearchResultsPageSize** setting is used to specify the maximum number of accounts displayed per page in the Account Hierarchy Builder Search Results list. By default, 20 accounts are displayed per page in the list.

UPCalcFilter

The **UPCalcFilter** setting provides a direct link to the custom **UPCalcFilter** page, where you can define specific criteria to filter the accounts included in the **iTools Account Hierarchy Ultimate Parent Calculation**. Any account that **does not meet the filter criteria** will be excluded from the calculation.

This feature was introduced in response to customer requests for enhanced performance optimization in the **Ultimate Parent Calculation**. By enabling sites—particularly those managing an excessive number of accounts—to specify a targeted set of accounts relevant to their **account hierarchy structure**, this feature significantly enhances calculation efficiency and optimizes overall system performance.



Follow these steps to set up and customize the **UPCalcFilter** for the **Ultimate Parent Calculation**:

1. **Click the UPCalcFilter iTools Setting**
2. **Define Filter Criteria**
    - Specify the conditions that determine which accounts will be included in the **Ultimate Parent Calculation**.
    - Examples of criteria:
        - **Record Type** – Include only accounts with specific record types.
        - **Business Unit** – Limit calculations to accounts within designated business units.
        - **Custom Fields** – Apply additional filters based on organizational requirements.
3. **Click Save**

Important: After updating the **UPCalcFilter** criteria, it is essential to run a **full Ultimate Parent Calculation** to ensure that the **account hierarchy structures** are updated according to the new filtering conditions. Follow these steps:

1. **Access the Ultimate Parent Calculation Page**
    - Click the **UPCalcFilter** link on the **iTools Settings** tab.
2. **Enable Advanced Options**

- Click the **'Show Advanced Options'** link to access additional configuration settings.

3. **Set the Record Limit**
   - In the **Record Limit** field, enter **-1** to process all applicable records based on the new filtering criteria.
4. **Start the Calculation Process**
   - Click the **'Start'** button to initiate the **Ultimate Parent Calculation** and update the **account hierarchy structures** accordingly.
5. **Monitor the UPCalc Process**
   - Track the progress of the calculation to ensure it completes successfully.
   - Refer to **RunUPCalc** for additional monitoring details.
6. **Review the Results**
   - Once the calculation is complete, **verify the hierarchy structure** to confirm that the updates correctly reflect the configured **UPCalcFilter** criteria.

RunUPCalc

The **RunUPCalc** setting provides a direct link to the custom Ultimate Parent Calculation page where you can review the results from the last Ultimate Parent Calculation job and manually initiate the ultimate parent calculation to run again.

The most common reason to initiate the job is to complete an Ultimate Parent Calculation that was interrupted due to an error, such as the failure of a particular validation check. Click the Start button to begin the Apex Job. To monitor the status of the Apex Job, go to **Setup** | **Monitoring |Apex Jobs.** It is located in the Administration Setup section. See the *Errors in Ultimate Parent Batch Apex Job* section of this guide for more information.

RunUPReset

The **RunUPReset** setting provides a direct link to the custom Ultimate Parent Reset page where you can manually initiate the reset and recalculation of accounts that are currently not included in the iTools Account Hierarchy, but should be. Click the Start button to begin the reset and queue the Ultimate Parent Calculation Apex Job. To monitor the status of the Apex Job, go to **Setup > Environments > Jobs > Apex.** If no accounts require a 'reset', then the Ultimate Parent Calculation job will not be queued.

The most common time to use this System Admin Setting is after you have imported a group of Accounts in which the Parent Account field was included in the field mapping. Due to how the Salesforce Import feature performs its import, there may be an incomplete assignment of Ultimate Parent values on certain accounts in a hierarchy. Using the **RunUPReset** Setting will correct the Ultimate Parent values and make sure all accounts are included in the appropriate hierarchy. See the *Import Accounts* section of this guide for more information.

SendEmailOnError

The **SendEmailOnError** setting controls whether or not an email containing detailed error information is sent when errors are generated during the Ultimate Parent Calculation Apex Job. When the setting is enabled, the user whose actions initiated the Apex Job is the one to whom the email is sent. These timely notification emails make it real easy to know when action is needed and provide the right information to quickly identify and resolve whatever issues may exist. See the *Errors in Ultimate Parent Batch Apex Job* section of this guide for more information.

IncludeLinksInEmail

The **IncludeLinksInEmail** setting controls whether or not the email sent when errors are generated during the Ultimate Parent Calculation Apex Job contains links to the Salesforce account that triggered the error. These links make it real easy to go directly to the account in Salesforce from the email and correct the problem. This setting is not enabled by default because, for security purposes, many email systems will not accept emails that contain external links. If your email system is configured to accept emails containing external links or any email sent from Salesforce, then we recommend you enable this setting. See the *Errors in Ultimate Parent Batch Apex Job* section of this guide for more information.

ViewAllAccounts

By default, only those accounts the user has permission to view will display on the Accounts tab in the iTools Customizable Account Hierarchy view. If you would rather have the complete hierarchy always display regardless of whether or not the current user has been granted access to view all the accounts, then you can use the **ViewAllAccounts** setting to enable this functionality. Choose **'Yes'** if you want the Accounts tab to show all accounts regardless of current sharing rules. Chose **'No'** if you want the Accounts tab to only show those accounts in the hierarchy for which view permission has been granted**.**

Important Note: The ViewAllAccounts option only applies to the Accounts tab view, meaning that the other tabs will only display the records for which read access has been granted. In addition, if the user clicks on an account to go to the details and does not have read privileges, then Salesforce will display the standard error message informing them they do not have appropriate privileges to view the account.

ViewAllObjData

By default, only the object data associated to the accounts in the hierarchy the user has permission to view will display on the tabs in the iTools Customizable Account Hierarchy view. If your organization would like to show all associated data regardless of whether or not the current user has been granted access to the information, then you can use the **ViewAllObjData** setting to enable this functionality. When enabled, 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. This setting is most valuable when your security settings are more restrictive (ex. Private), but your business needs require broader access to information within an account family.

Choose **'Yes'** if you want the non-Accounts tabs to show all records and field values regardless of current sharing rules. Chose **'No'** if you want the non-Accounts tabs to only show the associated object information for which view permission has been granted**.**

Important Note: If the user clicks on an account or related object to go to the details and does not have read privileges, then Salesforce will display the standard error message informing them they do not have the necessary privileges.

ActivateTrigger

In order to maintain the integrity of the account hierarchies, iTools monitors certain updates using an Apex trigger. The iTools trigger should normally be set as active, but there may be certain circumstances, such as when exceptionally large data loads or de-duplication processing is performed, when the trigger needs to be temporarily inactivated. Contact InSitu Software support at support@insitusoftware.com for additional information and guidance regarding inactivating and re-activating the iTools trigger.

ViewStateLimit

Specifies the limit used to activate the iTools ViewState management protocol which is necessary to avoid exceeding the Salesforce ViewState limit. If the 'Maximum view state size limit (135KB) exceeded' error message is displayed when attempting to view the iTools Account Hierarchy page, then the value of the ViewStateLimit field should be lowered. Contact InSitu Software support at support@insitusoftware.com for additional information and guidance regarding Salesforce ViewState limits and the ViewStateLimit setting value.

BatchSize

Indicates the number of records to be processed per batch when running the Ultimate Parent Calculation or Reset processes. The recommended value is 5 in order to reduce the likelihood of encountering time out limits when processing large hierarchies.

MaxNumAccounts

Indicates maximum number of account records retrieved per hierarchy. The value must be less than or equal to 9950. Enter a smaller number if/when your users encounter ViewState errors when attempting to display the Account Hierarchy page.

ParentFieldName

The **ParentFieldName** setting provides a direct link to the **Edit Parent Reference Field Name and Calculate Hierarchy** page, allowing you to specify which **Parent Account Field** should be used in the **iTools Ultimate Parent Calculation** to build the **iTools Account Hierarchy**.

Key Features & Default Behavior:

- By default, the **Salesforce Parent ID** field is used for parent-child relationships.

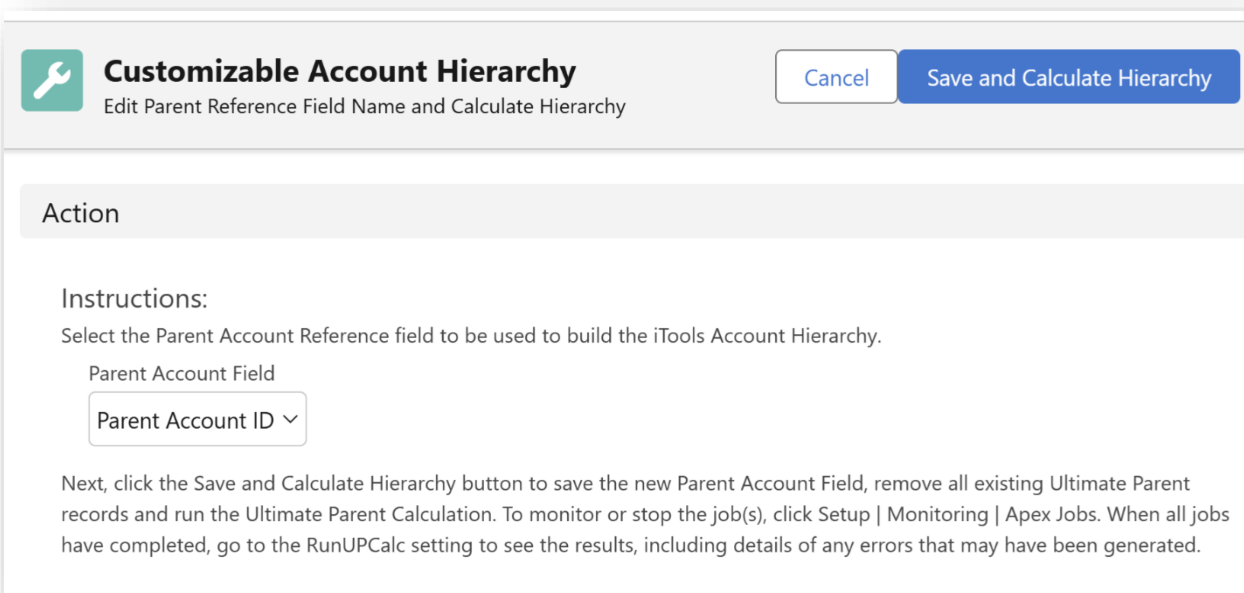
- This setting should only be modified for sites that actively maintain a **different field** to define account hierarchies.

When to Change This Setting?

- If your organization **tracks account relationships using a field other than Parent ID**, you can update this setting to use the appropriate field.
- This ensures that the **iTools Account Hierarchy** is structured based on the field most relevant to your Salesforce configuration.

Automatic Hierarchy Recalculation

- Once the **ParentFieldName** setting is changed, the system will **automatically trigger a full Ultimate Parent Calculation**.
- This process ensures that all **account hierarchy structures are updated** according to the newly specified **Parent Account Field**.



Follow these steps to configure the **Parent Account Reference Field** for the **iTools Ultimate Parent Calculation**:

1. **Access the ParentFieldName Setting**
   - Click the **ParentFieldName** link on the **iTools Settings** tab.
2. **Select the Parent Account Field**

- From the drop-down list of **applicable Account Reference fields**, choose the **Parent Account Field** that should be used in the hierarchy calculation.

3. **Save and Run the Ultimate Parent Calculation**

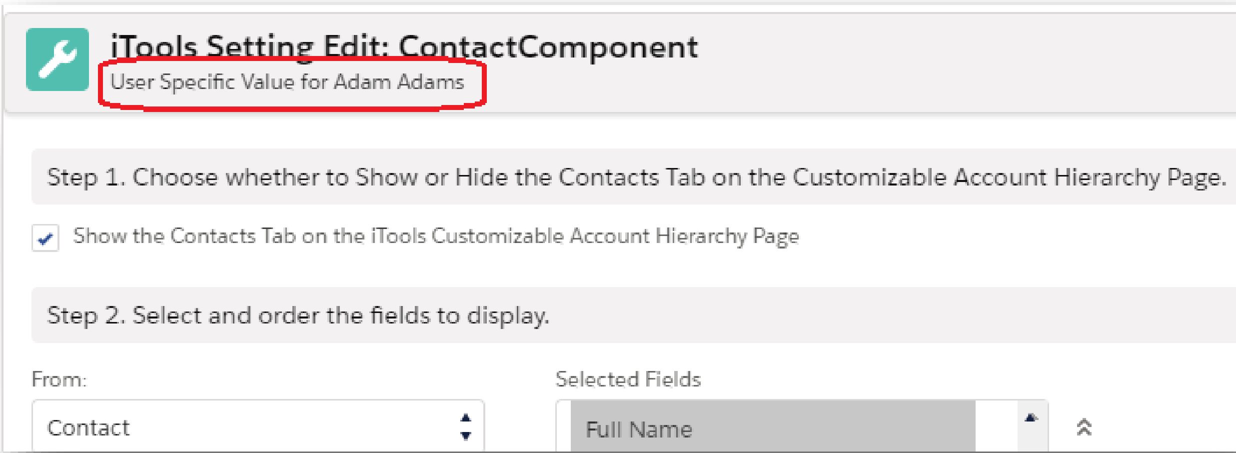
- Click **'Save and Calculate Hierarchy'** to:
  - Save the **new Parent Account Field** selection.
  - Remove all **existing Ultimate Parent records**.
  - Initiate a **full Ultimate Parent Calculation** to rebuild the account hierarchy.
- To **monitor or stop** the calculation job(s), navigate to:
  - **Setup → Monitoring → Apex Jobs**.
- Once all jobs are complete, go to the **RunUPCalc** setting to review the results and check for any errors.

4. **Review the Results**

- After the calculation completes, **verify the updated hierarchy structure** to ensure it accurately reflects the new **Parent Account designation**.

AllowEditMySettings

Using the iTools Settings Tab, Admin users can create user specific custom Account Hierarchy views. With the release of 3.0, you can now decide if you want to extend that same functionality to all users, allowing them to customize their own Account Hierarchy view. Set the AllowEditMySettings setting value to 'Yes' if you want the Account Hierarchy View to show the 'Edit My Display Settings' link. When a user clicks the link, the custom ***Object*****Component** edit page will display for the user to customize the view of the current tab. For example, if the user is currently viewing the Contacts Tab on the Account Hierarchy page and clicks the 'Edit My Display Settings' link, the iTools Setting Edit page will display the version of the ContactComponent setting specific to the current user.



If you only want users with Admin access (using the iTools Settings page) to customize the view, then choose 'No' and the 'Edit My Display Settings' link will not appear on the Account Hierarchy View.

Important! Additional Configuration Requirements – Enterprise, Unlimited and Developer Editions

With the Spring '10 release, Salesforce changed the security model for custom objects, which impacts the configuration of the **AllowEditMySettings** setting. If all of the following conditions are true for your organization, then additional configuration steps are required:

1. Your Salesforce edition is Enterprise, Unlimited or Developer.
2. You installed iTools Configuration Manager with the Spring '10 or later release.
3. You would like to set the **AllowEditMySettings** value to **Yes** to allow all users to edit their Account Hierarchy display settings.

Because iTools Settings use a custom object to store its information, permission to the custom object must be assigned to those users who want to directly edit their Account Hierarchy display settings. To properly set permissions for the iTools Settings custom object, continue reading the next section of this guide titled ***Set Custom Object Permissions*** and complete the steps provided.

AllowExportPrintView

Export and Printable View links are available on each of the Account Hierarchy tabs with which a user can export or display the tab contents in a printable view. If you do not want the user to be able to perform these actions, then choose 'No' and neither the Export or Printable View links will display. By default, this setting is set to ‘Yes’.

LargeTextLimit

The **LargeTextLimit** setting designates the maximum number of characters displayed in the view for large text fields (those fields defined with a data type of TextArea). If you always prefer the entire text be displayed, enter a value of 0. Otherwise, enter a number greater than 0. If a TextArea field for an item in a list exceeds the designated limit, the iTools Account Hierarchy page will display the first *n* characters and append three periods (…) to designate the display value as truncated.

InitialExpandLevel

The **InitialExpandLevel** setting indicates the Level to which the Hierarchy should expand upon initial display. To Expand All, leave blank (default). To Collapse All, set value to 0.

InitialHierarchyView

The **InitialHierarchyView** setting controls whether related object tabs display the **account hierarchy** upon initial load.

- **Select "Yes"** – Displays information in a **hierarchical view**, showing parent-child relationships between accounts.
- **Select "No"** – Displays information in a **flat (non-hierarchical) view**, where accounts are listed without hierarchy structuring.

Overriding the Default Setting for Specific Tabs:

- To **customize the view for a specific tab**, navigate to the **tab’s component link**.
- In the **Initial Hierarchy View** field, select the preferred display option for that tab.

OpenInNewTab

The **OpenInNewTab** setting determines whether clicking an object link within the **iTools Account Hierarchy view** opens the **object detail page** in a **new browser tab** or the **same tab**.

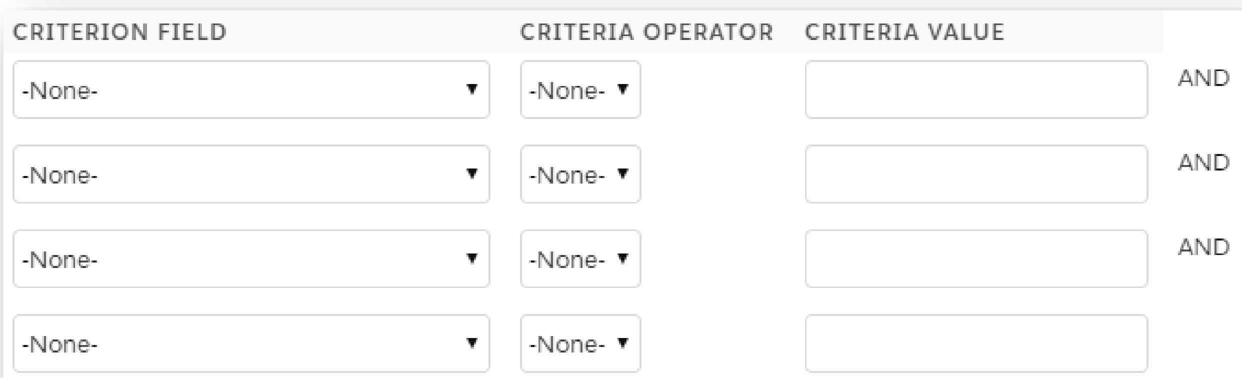
- **Select "Yes"** – Clicking an object link will open the **detail page in a new browser tab**, allowing users to keep their current view while accessing additional details.
- **Select "No"** – Clicking an object link will open the **detail page in the same browser tab**, replacing the current view.

Build Effective Filters

Standard Filters

Tab Filters and Tab Views are two powerful means which provide your users the ability to filter the information displayed on a tab. Filters are especially useful when working with an account hierarchy that has a large number of accounts and associated object records. iTools provides a wide variety of options and flexibility to help you create filters that are most effective to your organization.

iTools allows you to optionally specify up to four criterion when defining filter criteria. Each criterion is composed of 3 parts – a field, an operator and a value.



The value selected in the **Field** drop-down will determine which options are available in the **Operator** field. The values in the **Field** and **Operator** fields will determine whether or not a value is required in the **Value** field.

<u>Filtering on Text Fields</u>

- Filtering is not case sensitive.
- Separate search terms by commas to filter by more than one value. For example, to search for accounts in Illinois, New York, or Michigan, use State contains IL, NY, MI.

- To search for a phrase or term with an embedded comma, use double quotes to surround the full search text.

Filtering on Date Fields

- If entering a date, use the format allowed by your Locale setting. You can also use special date values like TODAY, NEXT WEEK, NEXT YEAR, LAST <number> DAYS, and so on.

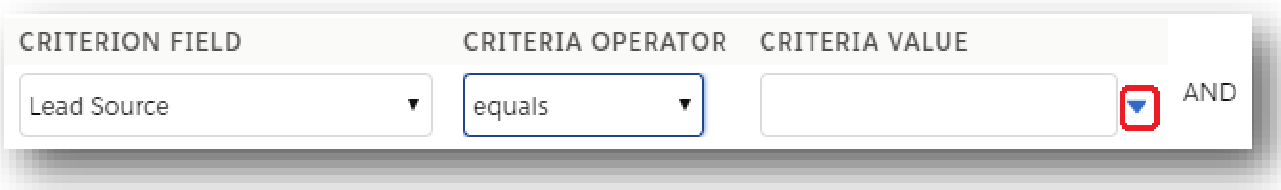
Filtering on Numeric Fields

- Place quotation marks around numbers or other data that includes commas. For example Amount equals "20,000" returns records that have an amount of $20,000 but Amount equals 20,000 returns $20,000 as well as $20 and $0.
- To search for phone numbers, include the exact phone number formatting. For example, Phone starts with (561).

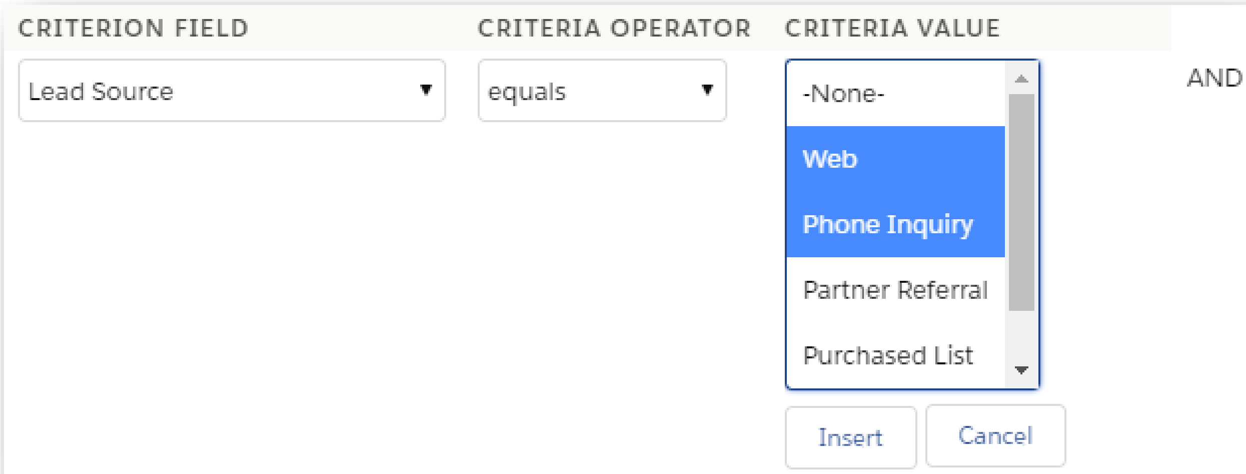
Filtering on Picklist Values

- If a picklist or multi-select picklist field is selected, a drop-down list of values is provided whenever the Operator value is equals, not equal to, contains or does not contain.

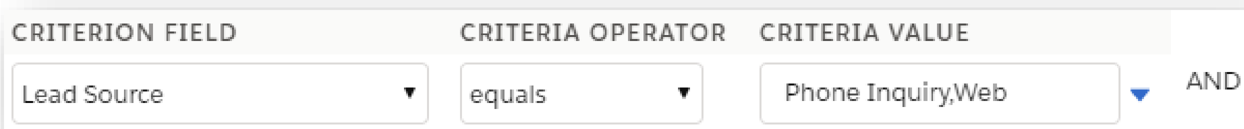
  Click the down arrow to display the full list.



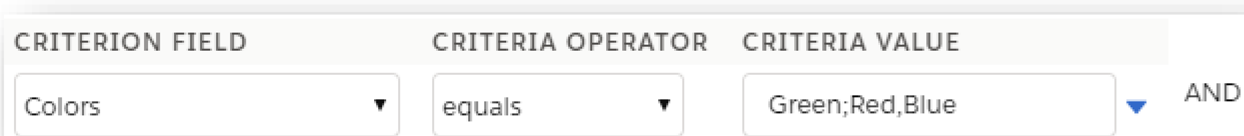
  Select the value(s) to search and click **Insert**.



When filtering on multiple values, use a comma to separate the values. The results will include records with a field value that matches any of the values specified.



- When filtering on multi-select picklist fields, use a semicolon between values to specify an exact match.
  To filter on contacts with a Color value of Green *and* Red, enter Green;Red in the Value field.
  To filter on contacts with a Color value of Green *and* Red OR a Color value of Blue, enter Green;Red,Blue in the Value field.



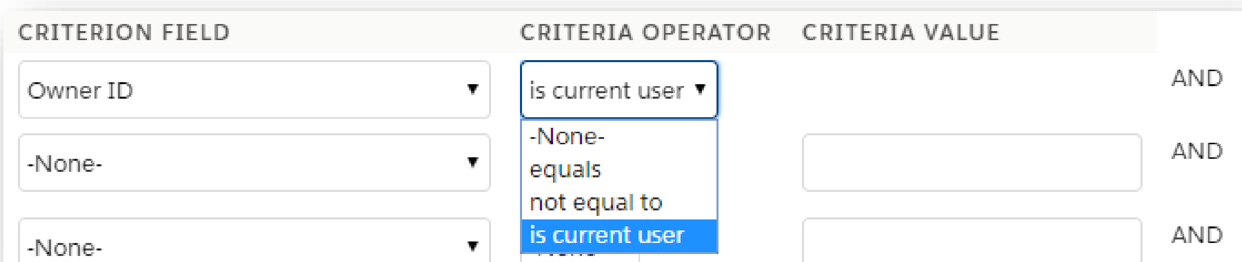
Filtering on Record Type Values

- The Record Type Name or ID can be entered in the Value field

- Similar to Picklist fields, if the Record Type ID field is selected, a drop-down list of valid Record Types is provided.
- When filtering on multiple values, use a comma to separate the values. The results will include records with a record type that matches any of the values specified.

<u>Filtering on ID or Reference Values</u>

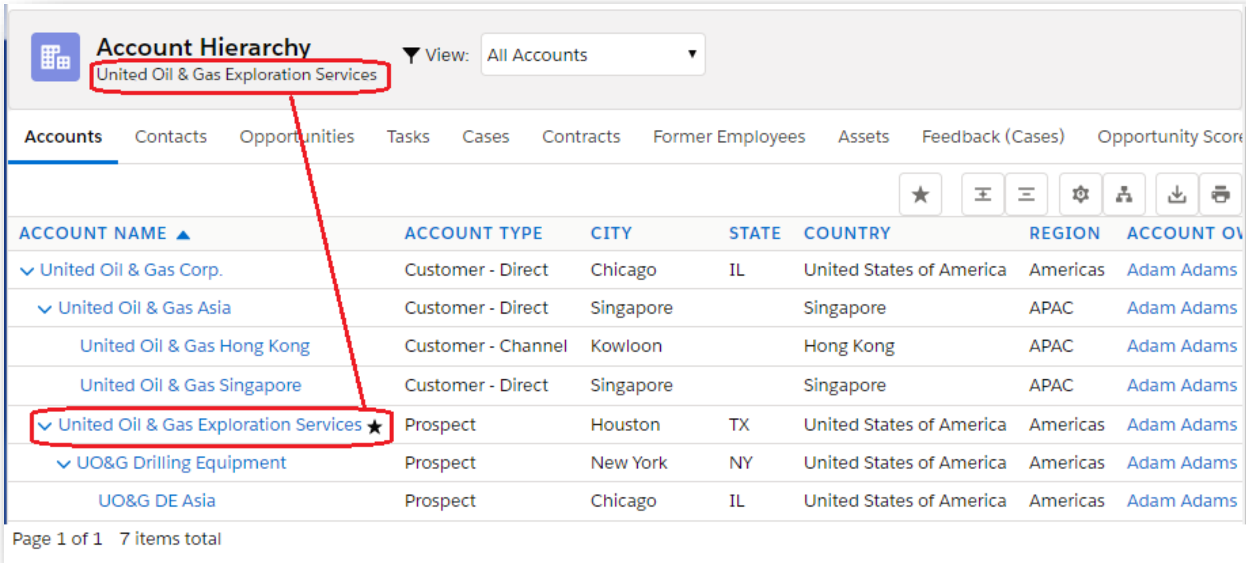
- Multiple IDs can be specified. Use a comma to separate the ID values. The results will include records with an ID that matches any of the ID values specified.
- When filtering on a User Reference field (such as Owner ID), iTools provides a special ‘is current user’ operator. When selected, the filter will include only those records with a user field value that is set to the current user. Select this operator when you want to create filters such as ‘My Contacts’, ‘My Opportunities’, etc.



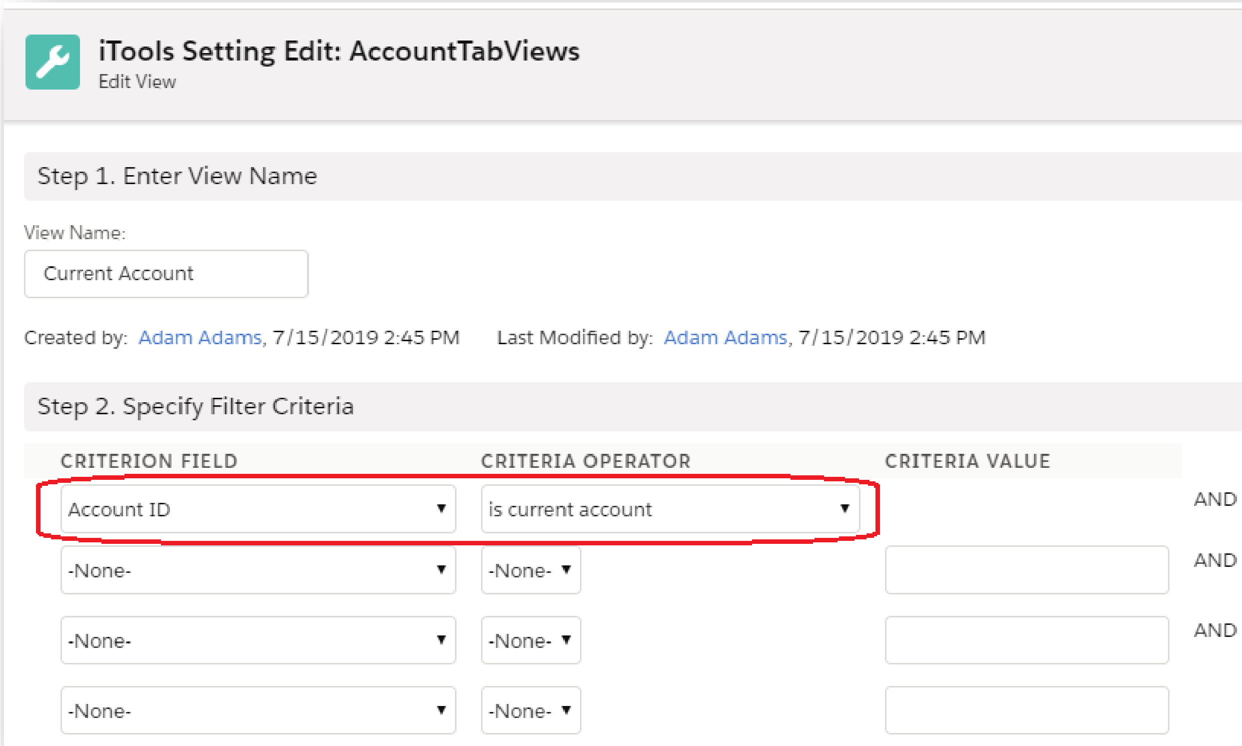
<u>Filtering on Account ID Value</u>

When filtering on the Account ID, iTools provides two special criteria operator options:

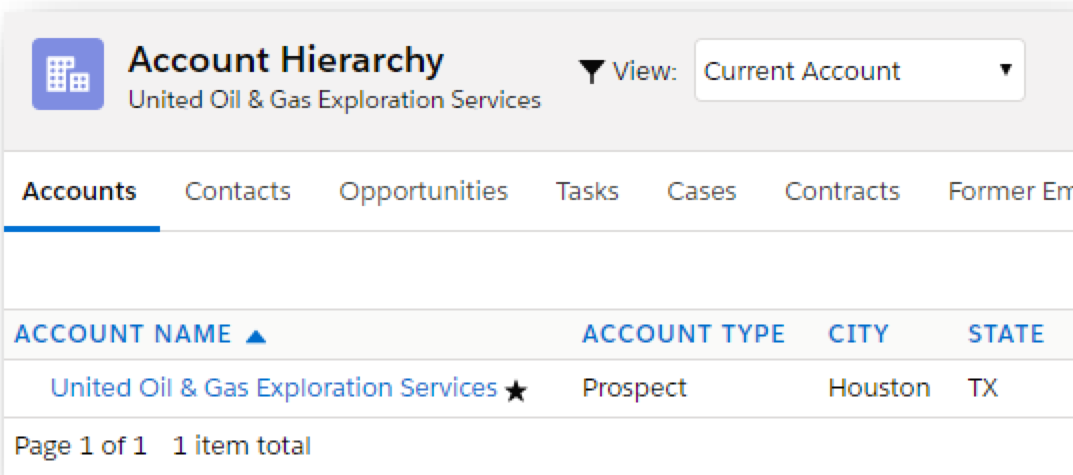
- **‘is current account’** - When selected, the account filter will include only the single record that represents the ‘current account’. The current account is marked with a black star and is the account from which the View Hierarchy button was clicked.



Use the following criteria to create an Account Tab View that only displays the current account and all object related information:

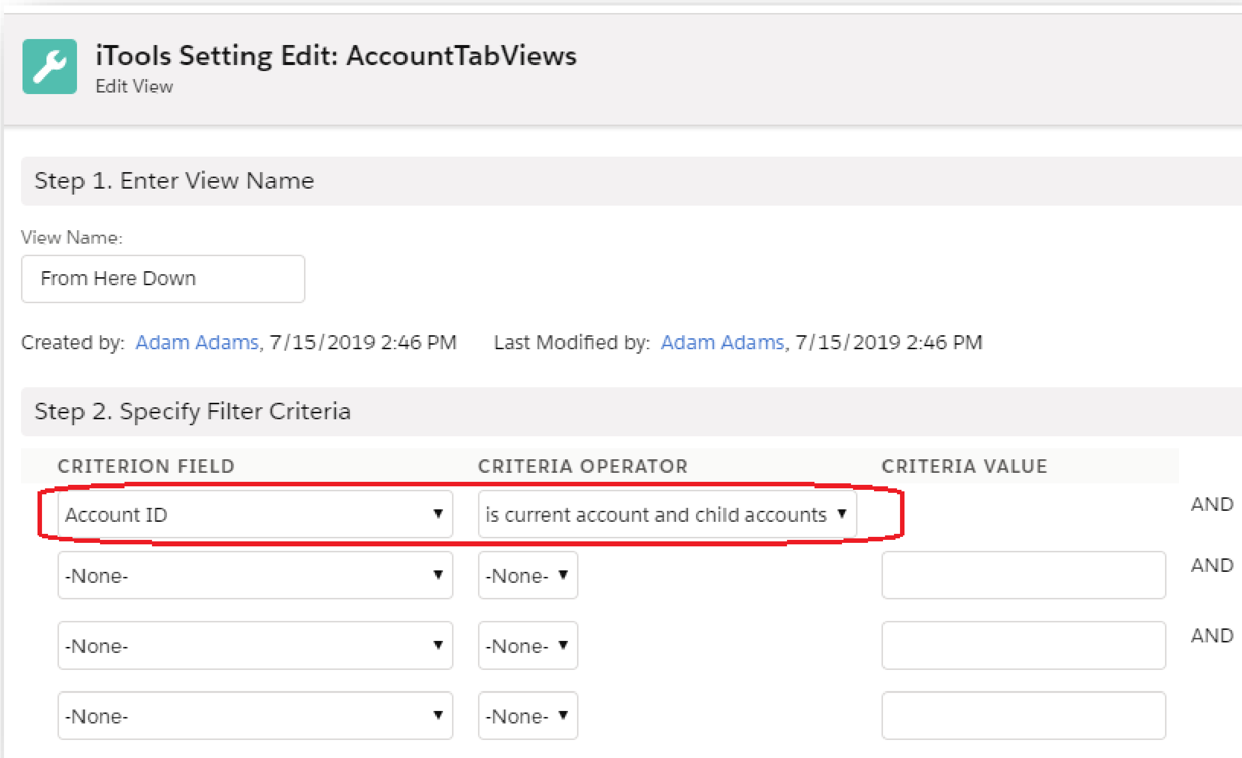


Here is the display when the 'Current Account' Tab View is selected:

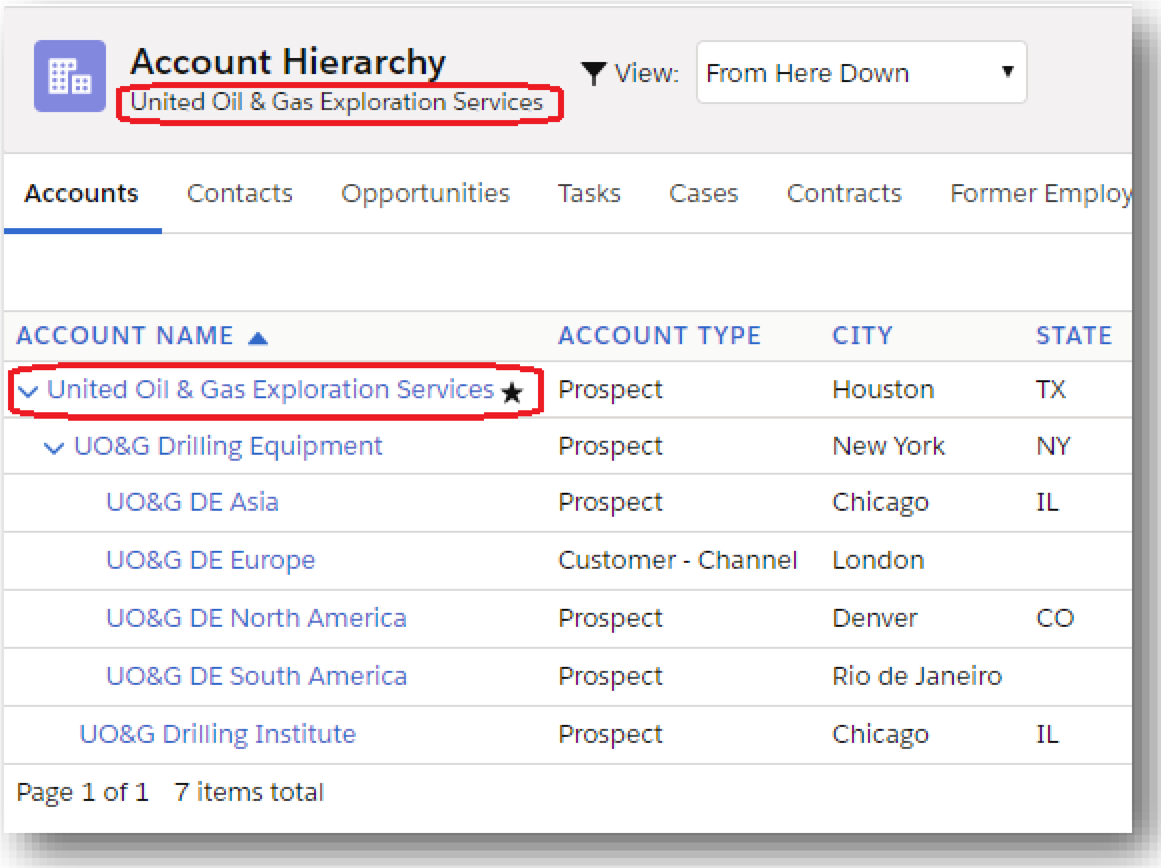


- **'is current account and child accounts'** - When selected, the account filter will include the account record that represents the 'current account', plus all child accounts. Also known as the 'From Here Down' filter, this provides a way to display all the accounts within a 'branch' of the account hierarchy.
  Note: the number of 'levels' displayed in the account hierarchy branch is limited to 6 - the current account and 5 levels of child accounts.

  Use the following criteria to create an Account Tab View that displays the current account and all child accounts (up to 6 levels in total):



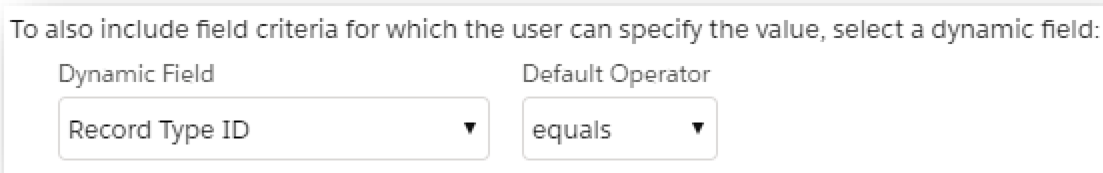
Here is the display when the ‘From Here Down’ Tab View is selected:



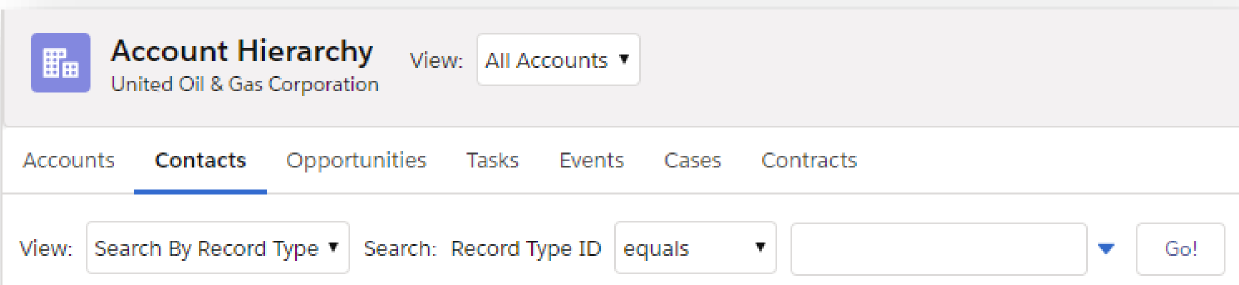
Dynamic Field Filters

In addition to static criteria, Tab Views provides a powerful **Dynamic Field** option which allows a user to dynamically specify the field search criteria while viewing the Account Hierarchy tab.

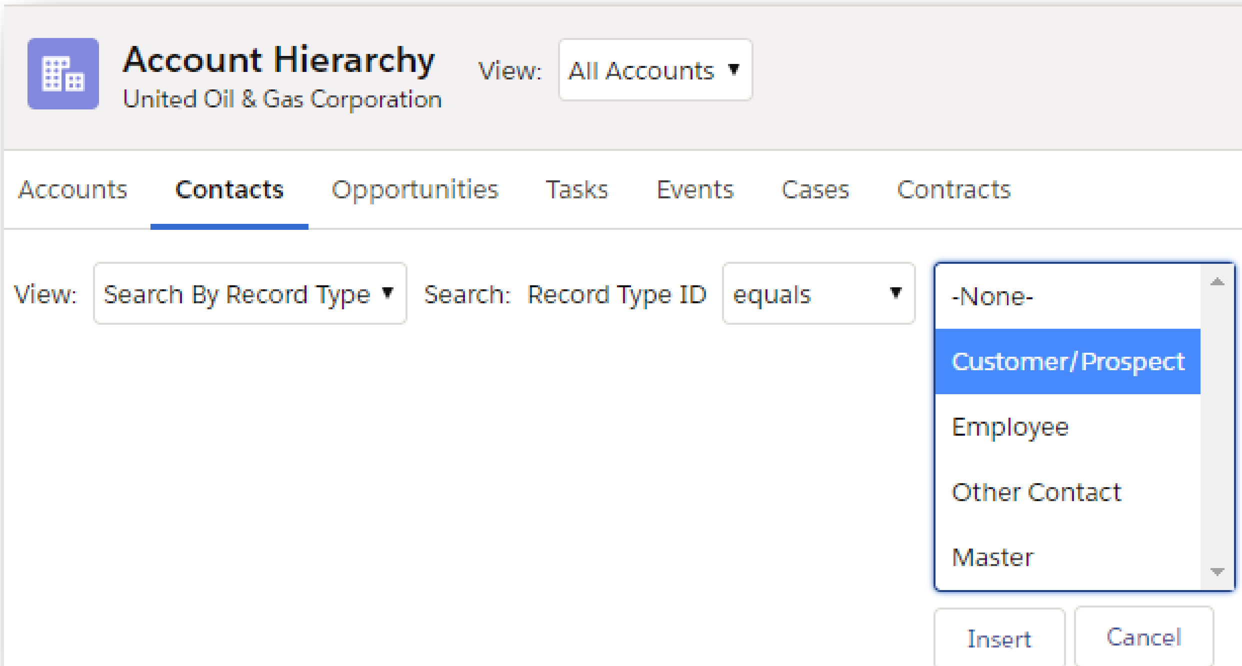
To create a dynamic field filter, select the Dynamic Field and (optionally) the default Operator. For example, enter the following to create a 'Search by Record Type' View:



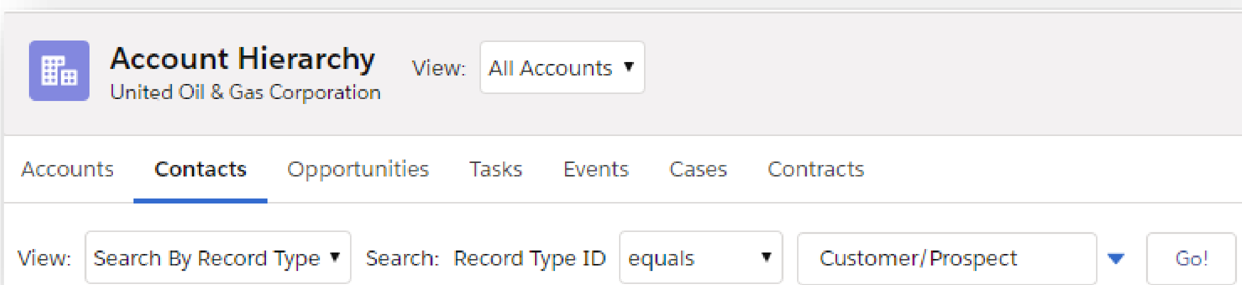
When the View is selected in the iTools Account Hierarchy tab, a set of input criteria fields will display. The user can enter the record type id or name or click the down arrow to see the list of Record Types:



Select the value(s) from the list and click **Insert**.

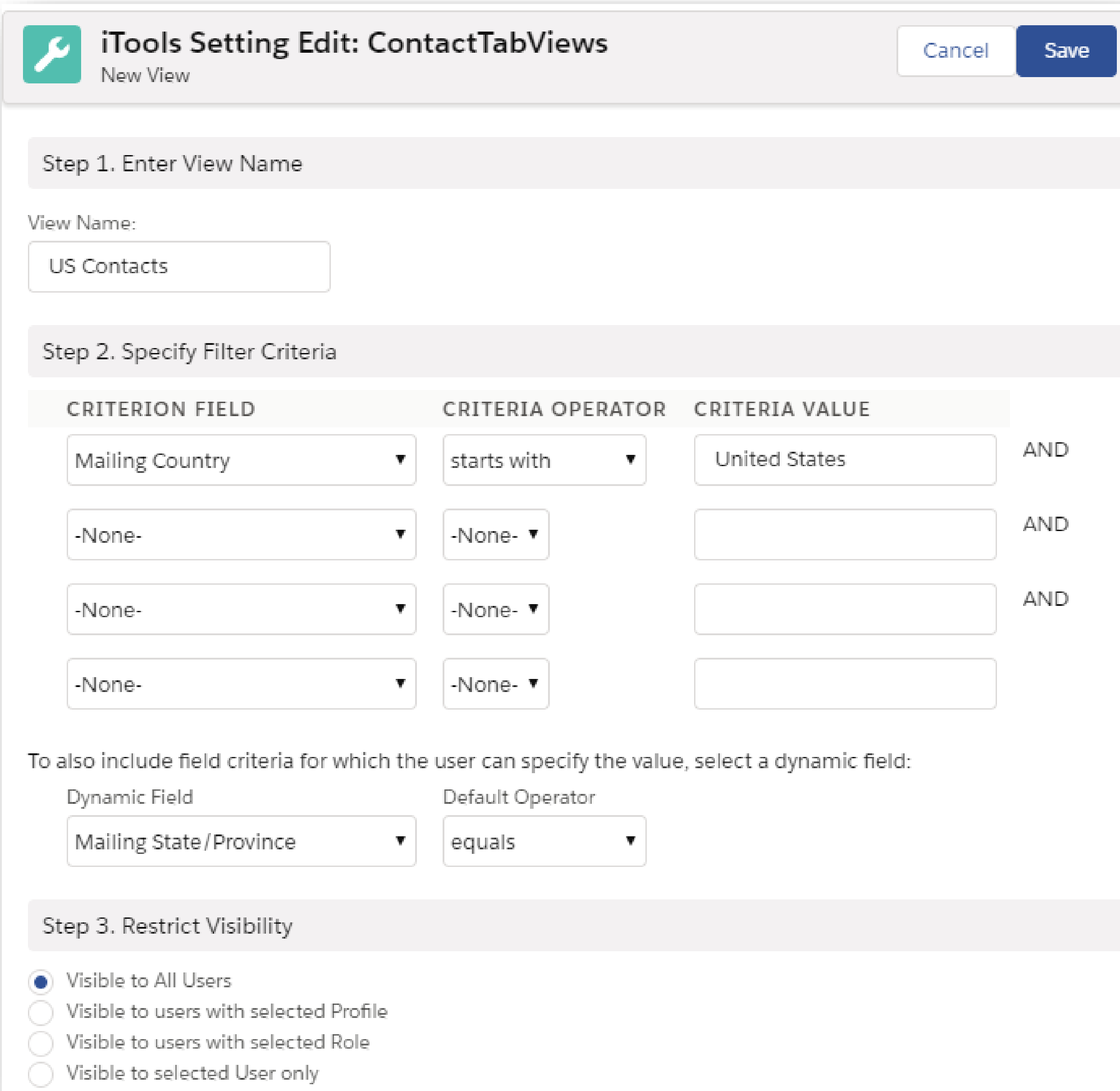


Click **Go!** to update the results with all records of the selected record type(s).

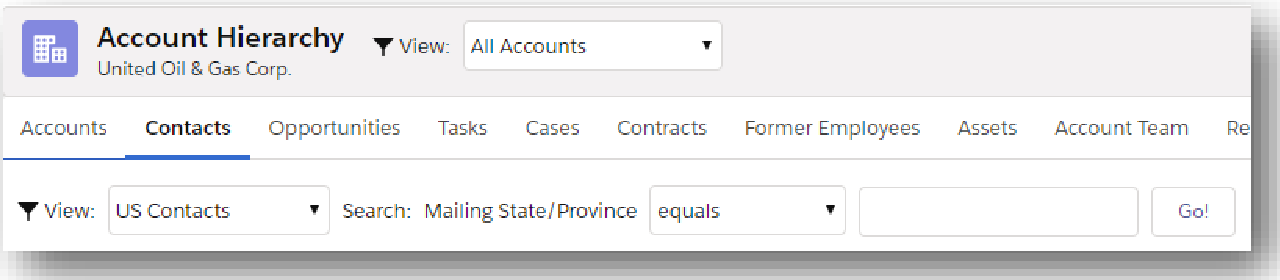


A Tab View can be defined with both Static and Dynamic Criteria.

Example: Create a US Contacts list view to dynamically search for contacts in a specified state within the United States.



When the View is selected in the iTools Account Hierarchy tab, the following set of input criteria fields will display:



iTools Custom Object Permissions

If your Salesforce edition is Enterprise, Unlimited or Developer, non-Admin users do not have access to newly created custom objects. Because the iTools Settings are stored in a custom object, you must provide all non-Admin users extended access permission the iTools Custom Settings objects – **only if you want to let your users edit their own Account Hierarchy display settings using the 'Edit My Display Settings' link.** Without Create, Read, Edit and Delete permission, your users will not be able to view and edit their own Account Hierarchy display settings.

If you currently use the **Professional Edition** of Salesforce CRM, custom object permission is automatically granted to all users for all custom objects added to the system. Therefore, there are no additional configuration steps required to enable the iTools **AllowEditMySettings** Setting.

Permission Sets and Custom User Profiles

There are currently two methods that can be used to grant permission to your users for access to the iTools Settings custom objects in order to customize their own display settings. These methods are:

1. **Permission Sets** (**Recommended**)

   A permission set is a collection of settings and permissions that give users access to various tools and functions. Each user continues to have a Profile, but Permission Sets can now be given to individual users to extend their permissions without changing their profile.

2. **Custom User Profiles**

   In addition to Standard profiles, Enterprise, Unlimited, and Developer Edition organizations provide the ability to create custom profiles which allow you to configure object permission settings for custom objects. Since Salesforce.com does not allow custom object permission settings to be changed on a standard profile, custom profiles must be used and assigned to non-System Administrator users before they can access the iTools Settings custom objects.

iTools Account Hierarchy User Permission Set

A permission set with the following access rights provides access to the resources necessary for the standard iTools Customizable Account Hierarchy user to view the iTools pages and access the supporting actions.

Visualforce Page Access

- InSituCah.InSitu_Account_Hierarchy
- InSituCah.InSitu_AHBuilder
- InSituCah.InSitu_AHOutput
- InSituCah.InSitu_Explorer

The following additional access rights must be set for all users to whom the '**Edit My Display Settings**' link is enabled:

Object Settings:

- For these iTools Objects:
  - iTools AppSetting Views
  - iTools FieldList Values
  - iTools Settings
- Set these Permissions:
  - Object Permission: Read, Create, Edit, Delete
  - Field Permission: Read and Edit Access to all fields

Visualforce Page Access

- InSituCah.InSitu_AHCompSettings

iTools Account Hierarchy System Administrator Permission Set

A permission set with the following access rights provides access to the resources necessary for a System Administrator to configure all iTools Customizable Account Hierarchy settings, view all iTools pages and access all supporting actions.

Object Settings:

- For these iTools Objects:
  - iTools AppSetting Views
  - iTools FieldList Values
  - iTools Settings
  - Ultimate Parents
- Set these Permissions:
  - Tab Permission (iTools Settings only): Visible
  - Object Permission: Read, Create, Edit, Delete, View All, Modify All
  - Field Permission: Read and Edit Access to all fields

- For these custom iTools Fields:
  - Account Custom Field: Ultimate Parent
  - Account Custom Field: Ultimate Parent Flag
- Set these Permissions:
  - Read and Edit Access

Visualforce Page Access

- InSituCah.InSitu_Admin_Procs
- InSituCah.InSitu_AHBuilder
- InSituCah.InSitu_AHCompSettings
- InSituCah.InSitu_AHCustomPageSettings
- InSituCah.InSitu_AHOutput
- InSituCah.InSitu_AltHierManage
- InSituCah.InSitu_Explorer
- InSituCah.InSitu_Std_SettingsUpdate
- InSituCah.InSitu_TabViewEdit
- InSituCah.InSitu_TabViewManage
- InSituGen.InSitu_AppSettingDetailEdit iTools Configuration Manager
- InSituGen.InSitu_AppSettingDetailView iTools Configuration Manager
- InSituGen.InSitu_AppSettingFLEdit iTools Configuration Manager
- InSituGen.InSitu_AppSettingFLManage iTools Configuration Manager
- InSituGen.InSitu_AppSettingFLUSAdd iTools Configuration Manager

- InSituGen.InSitu_AppSettingMaintenance iTools Configuration Manager
- InSituGen.InSitu_AppSettingManage iTools Configuration Manager
- InSituGen.InSitu_Std_SettingsUpdate iTools Configuration Manager

Custom User Profiles

An organization can control access to iTools custom objects by creating and assigning a custom user profile to select members of their user community. A custom user profile can be used to provide the additional access rights needed for those users to whom the '**Edit My Display Settings**' link is enabled:

Migrating Users from Standard to Custom Profiles

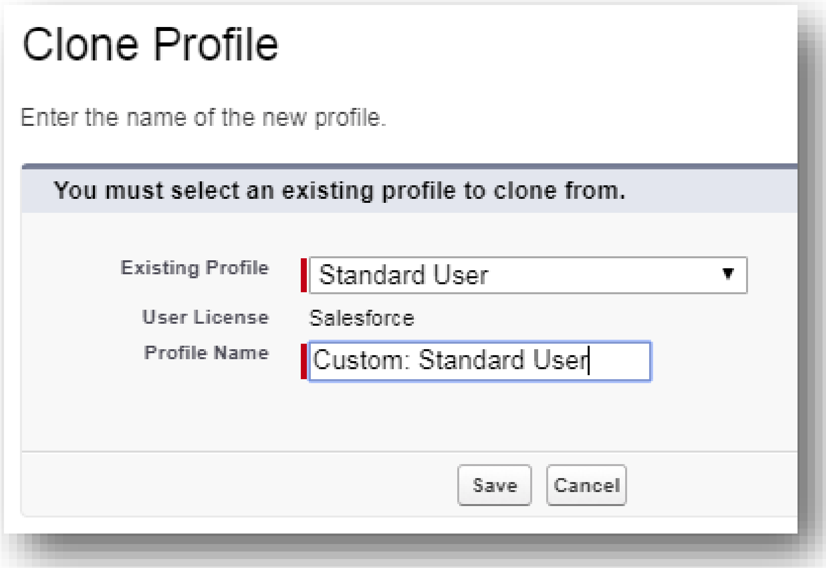
If you have non-admin users assigned to 'standard' profiles, those users should be re-assigned to a custom profile in order to access the iTools Settings custom objects. This is because object permissions on 'standard' profiles are set to 'off' or no access and cannot be changed.

Reassigning users to custom profiles can be as easy as:

- Cloning the standard profiles and turning on access to the iTools custom objects.
- Working through the list of users for each standard profile and re-assigning them to a custom profile.

Follow these steps to migrate users from standard to custom profiles.

1. Go To **Setup** > **Users** > **Profiles**.
2. For each standard profile (no checkmark in the Custom column) you have assigned to active users, repeat this 2-part step to create a custom version of the same profile. Since the System Administrator profile provides full access to custom objects, a custom profile does not have to be created for it.
    a. Click the **New** button.
    b. From the **Existing Profile** dropdown list, select the standard profile you would like to clone. Then, enter the new profile name in the **Profile Name** field and click **Save**.



When creating custom profiles, it is important to use consistent naming conventions which make it easy to identify and manage them all. A simple, but valuable naming convention is to prefix the new Profile Name with the word 'Custom: ', followed by the standard profile name from which it was cloned.

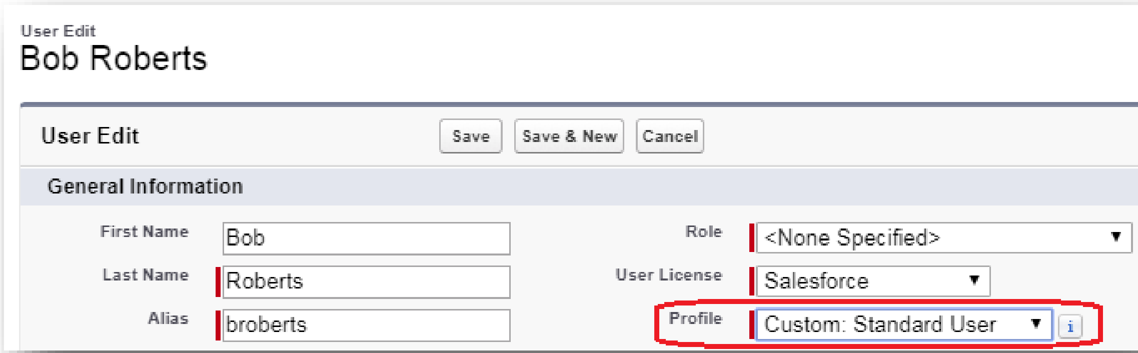
After you have created a custom version of each standard profile you want to edit, you will need to re-assign users from each standard profile to the new 'cloned' version. To do this, follow these next steps:

3. Go to **Setup** > **Users** > **Users**.

4. For each active user assigned to a standard profile, repeat this 2-part step to change their profile assignment.

    a. Click on the **Edit** link.

    b. Select the new custom version of the user's current profile in the **Profile** dropdown list and click **Save**.

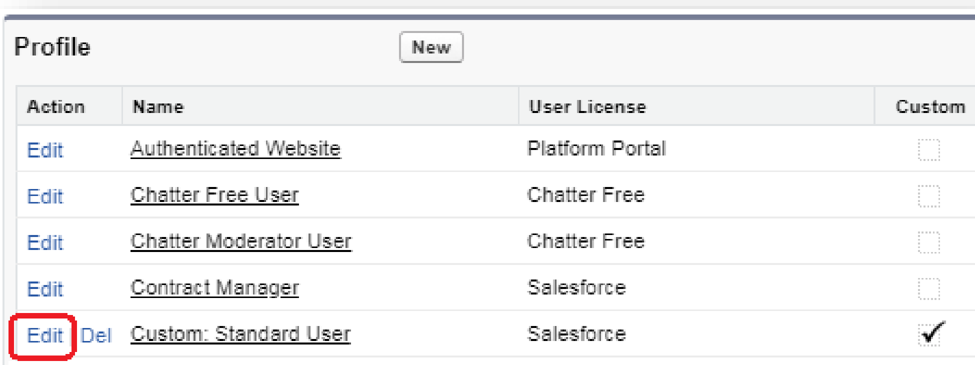


Updating Custom Object Permissions

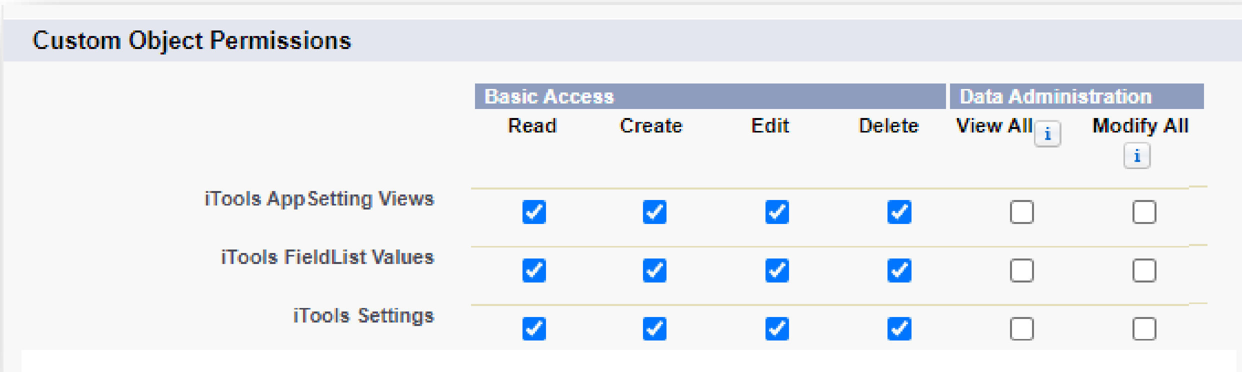
In order for your users to view and edit their Account Hierarchy display settings, you must grant 'Read' and 'Edit' permission to the **iTools Settings** object and 'Read' permission to the **iTools FieldList Values** object via their custom profile.

Repeat the following set of steps to update each custom profile:

1. Go to **Setup > Users > Profiles.**
2. Locate the custom profile to update and click the **Edit** link.



3. Scroll down to the Custom Object Permission section of the page and locate the **iTools AppSetting Views**, **iTools FieldList Values and iTools Settings** custom objects.
    - Click the **Read, Create, Edit and Delete** checkboxes for each of the 3 iTools Custom objects.



- Click the **Save** button at the bottom of the page.

If you have many profiles to update, consider using Enhanced Profile List Views. This powerful, time-saving feature lets you edit multiple profiles at once from a list view instead of individually as noted above. To enable this feature, go to Setup > Users > User Management Settings, locate the Enhanced Profile List Views setting and click the toggle checkbox to change the setting from Disabled to Enabled .

iTools Account Hierarchy Builder

An account hierarchy is created by associating accounts with parent accounts. In Salesforce CRM, this is typically accomplished through a multi-step, multi-screen process in which the Parent Account value is set for each of the accounts in the hierarchy (except for the topmost account, also known as the Ultimate Parent). For even the simplest of hierarchies, setting the Parent Account value for all the accounts in the family is a very time-consuming process.

The iTools Account Hierarchy Builder is specifically designed to cut the time and effort needed to construct and maintain account hierarchies down to the bare minimum. With simple search and point/click actions, accounts can be added to and moved within a hierarchy - all from a single page.

Accessing the Account Hierarchy Builder

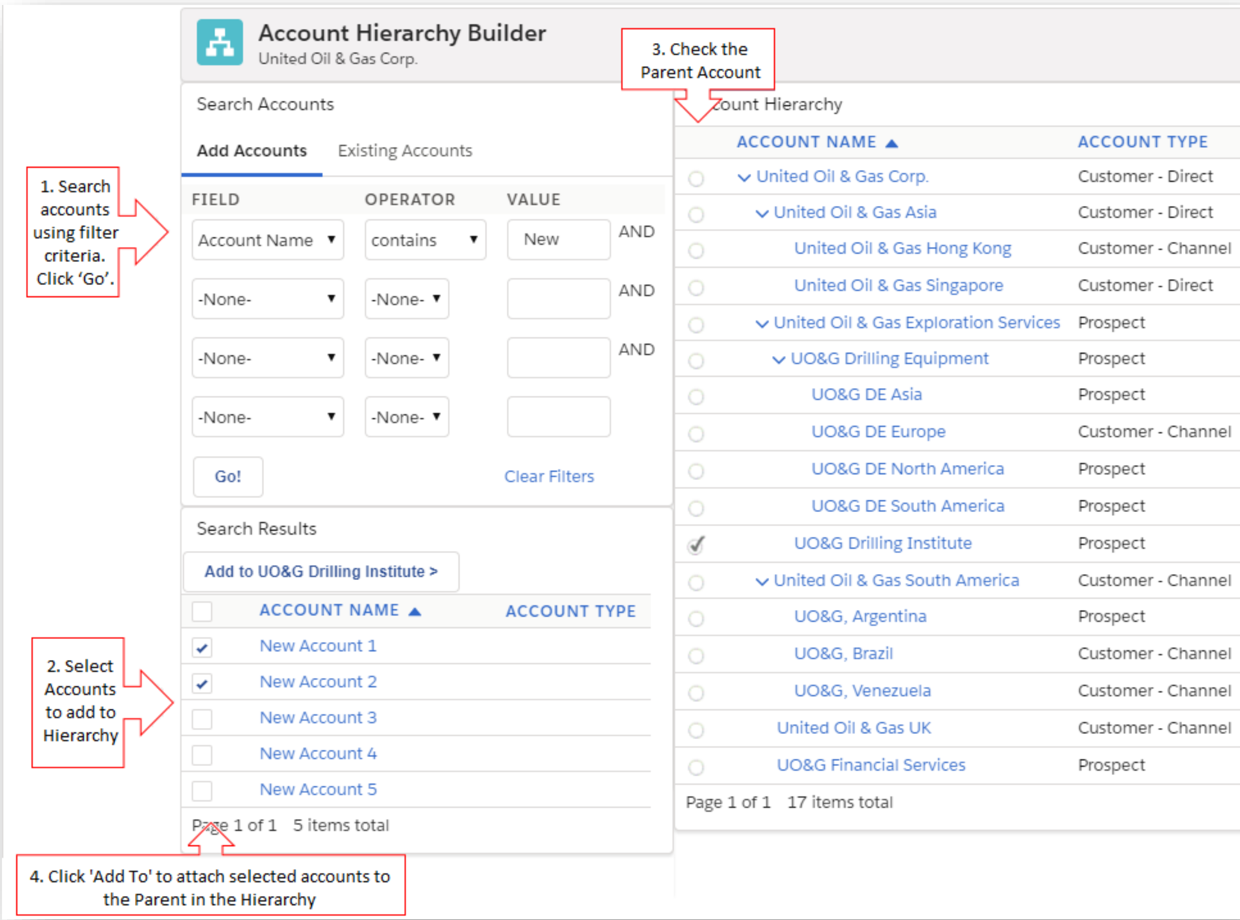
To access the Account Hierarchy Builder, go to the Account Hierarchy page and click the '**Build Hierarchy**' button in the upper right hand corner.

Adding Accounts to a Hierarchy

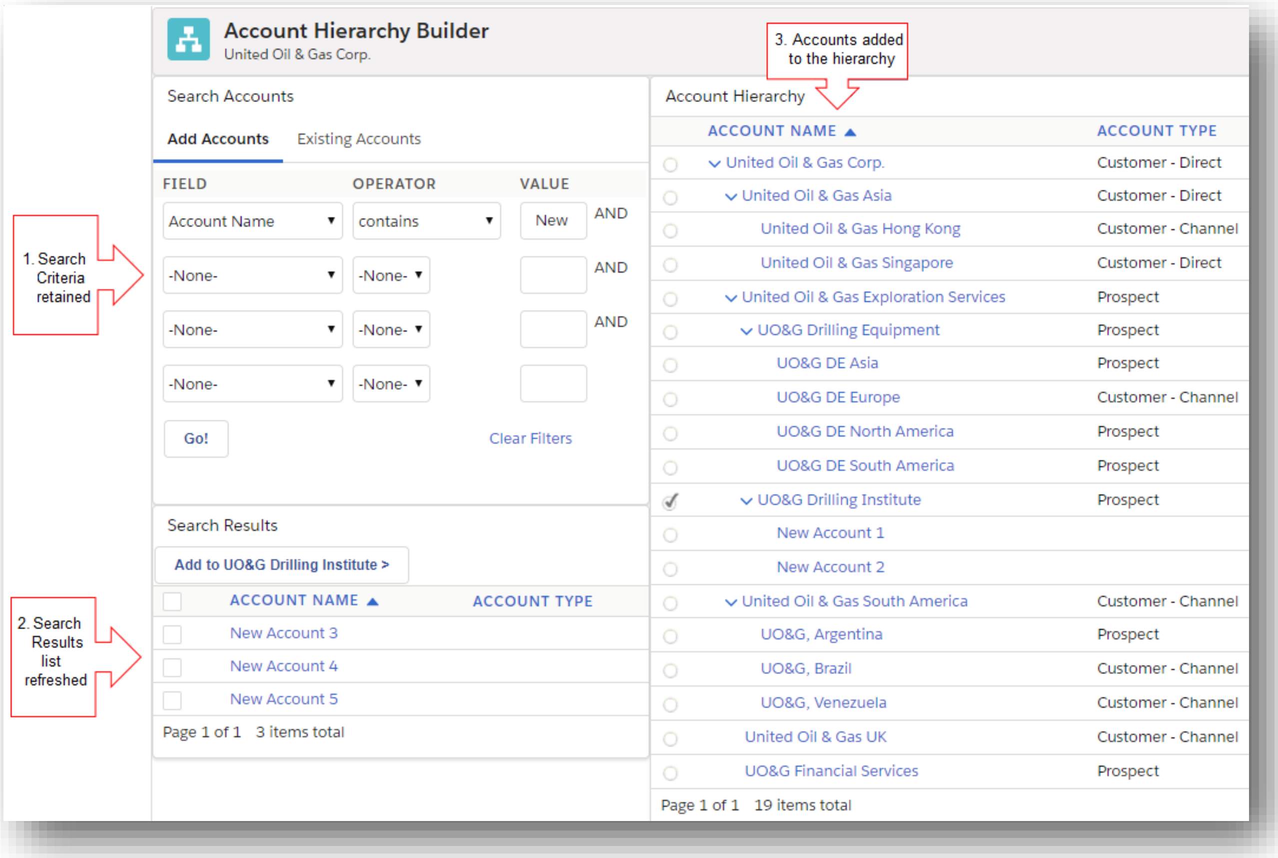
The Account Hierarchy Builder page is divided into 3 main sections: Filter Criteria, Search Results and Account Hierarchy. The layout of the sections supports the typical process flow for adding accounts to a hierarchy:

1. Search for accounts.
2. Select the account(s) to add to the hierarchy.
3. Designate the parent account for the selected accounts.
4. Select the 'Add' button to add the accounts to the hierarchy.
5. Repeat steps 1-4 until the account hierarchy is complete.

The following diagram depicts the Account Hierarchy Builder page with the associated workflow actions to add accounts to a hierarchy.



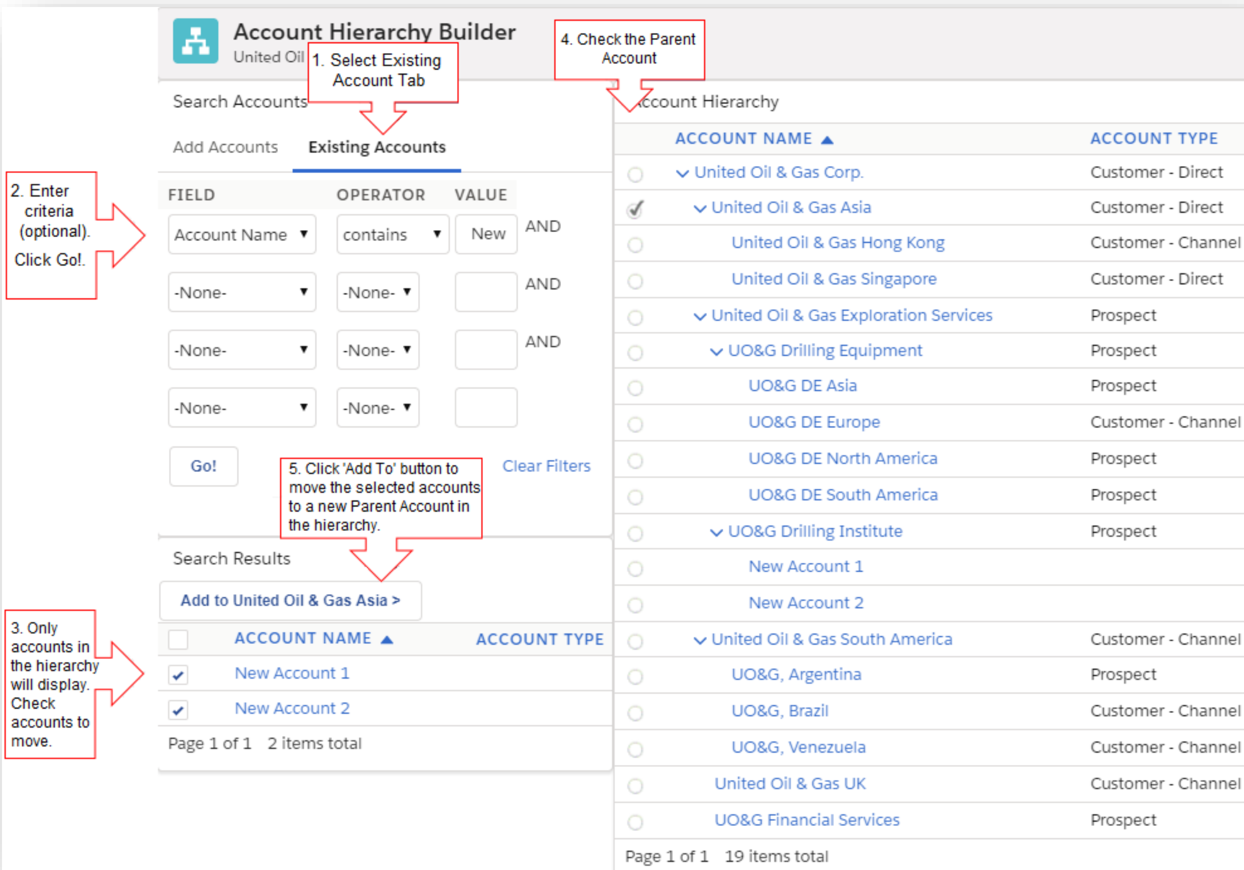
The following diagram shows the Account Hierarchy Builder page **after** steps 1-4 in the previous diagram were performed.



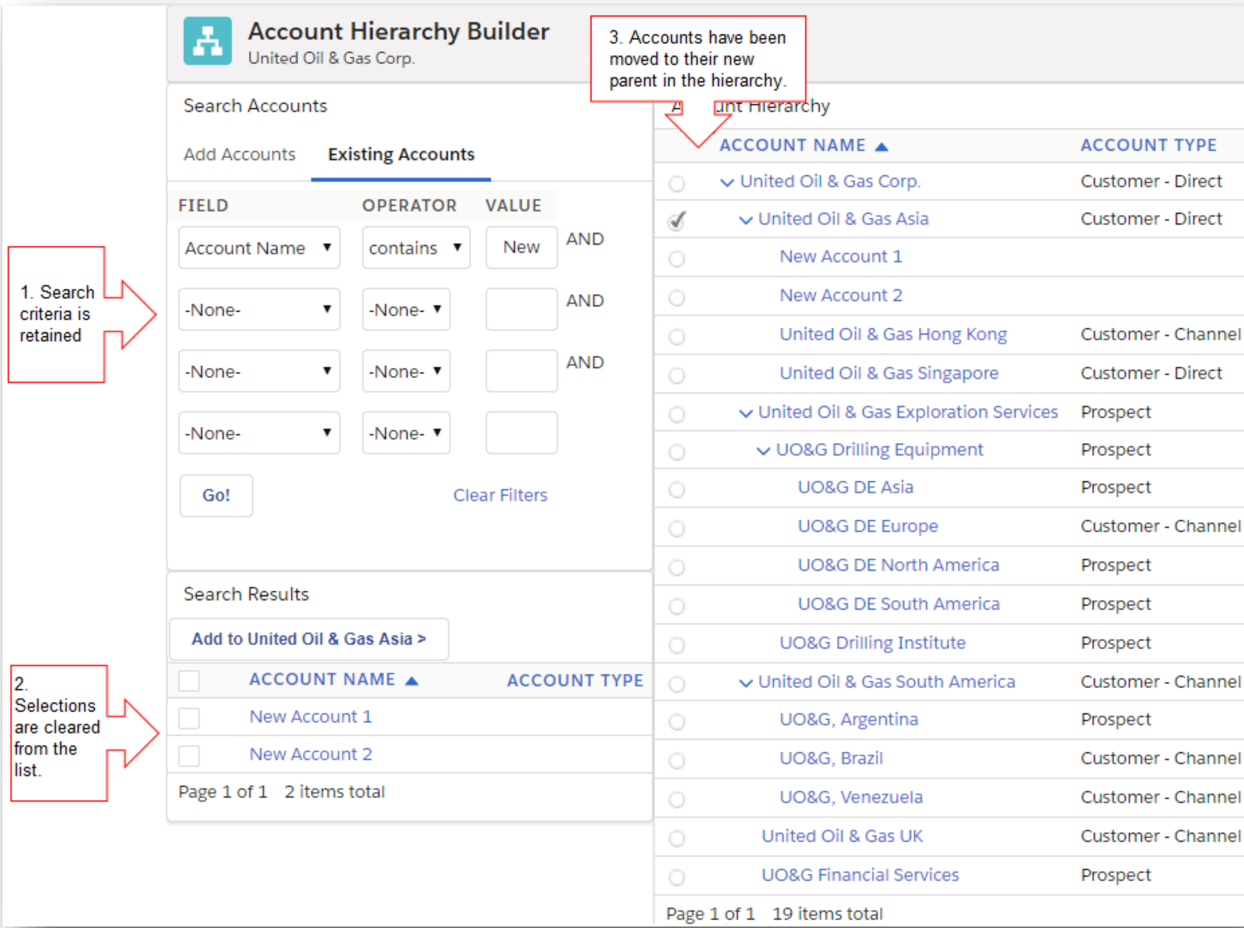
To complete the hierarchy, simply stay on this page and repeat workflow steps until all accounts have been added to their respective parent(s).

Moving Accounts within a Hierarchy

It is sometimes necessary to move accounts within a hierarchy by re-assigning the parent account. Using the same workflow steps, the Account Hierarchy Builder page makes this real easy too. By selecting the **Existing Accounts** tab in the **Filter Criteria Section**, only those accounts that currently exist in the hierarchy will be displayed in the search results list. For this tab, additional search criteria can be added, but is optional. Follow the steps in the diagram to learn how to move accounts within a hierarchy.

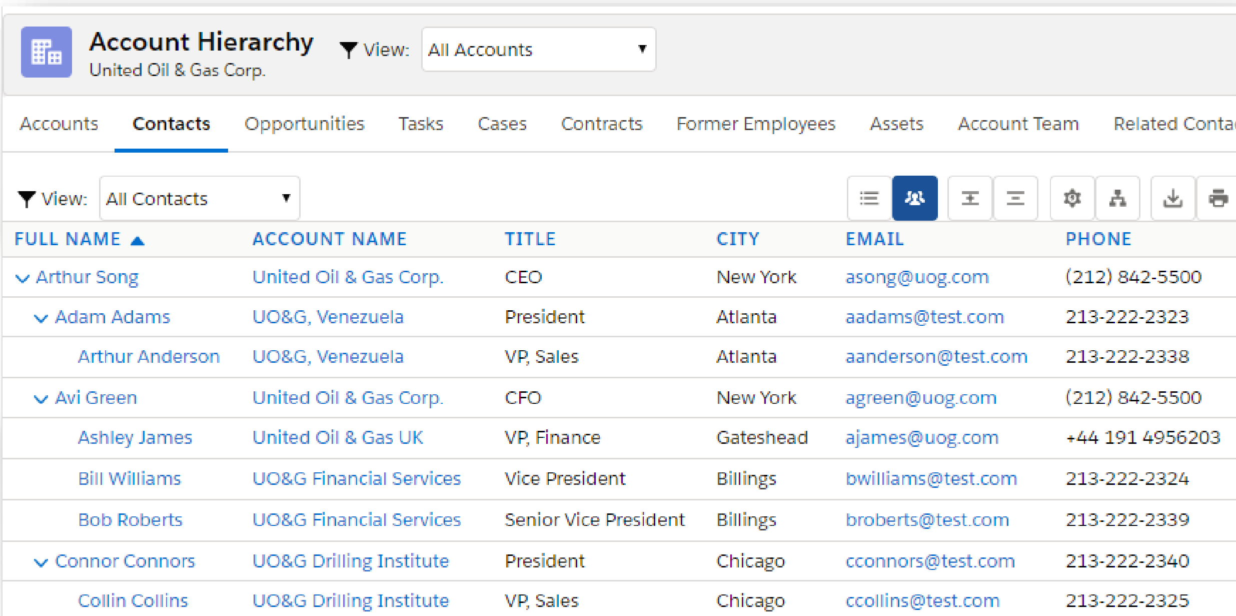


The following diagram shows the Account Hierarchy Builder page **after** steps 1-5 in the previous diagram were performed. As you can see, the two selected accounts (New Account 1 and New Account 2) are now listed under their new parent account (United Oil & Gas, Asia).



iTools Org Chart View

The Org Chart View is available on the Contacts tab of the iTools Customizable Account Hierarchy page. An organization chart is created based on the contacts selected in the **Reports To** field of each contact. To create a single chart for a family of accounts, make sure every contact but the one at the top of the hierarchy contains another contact in the **Reports To** field. If the contacts associated to accounts in the hierarchy are not all connected in a single chart, then that is ok too. The iTools Org Chart View will still display all the contacts. Any contact without a value in the **Reports To** field will be sorted to the bottom of the list.



In order for the contact hierarchy to display properly, the **Name** (Full Name) field must be added as a column on the Contacts tab. For instructions on how to customize the Contacts tab see the iTools Settings ***Object*Component** section

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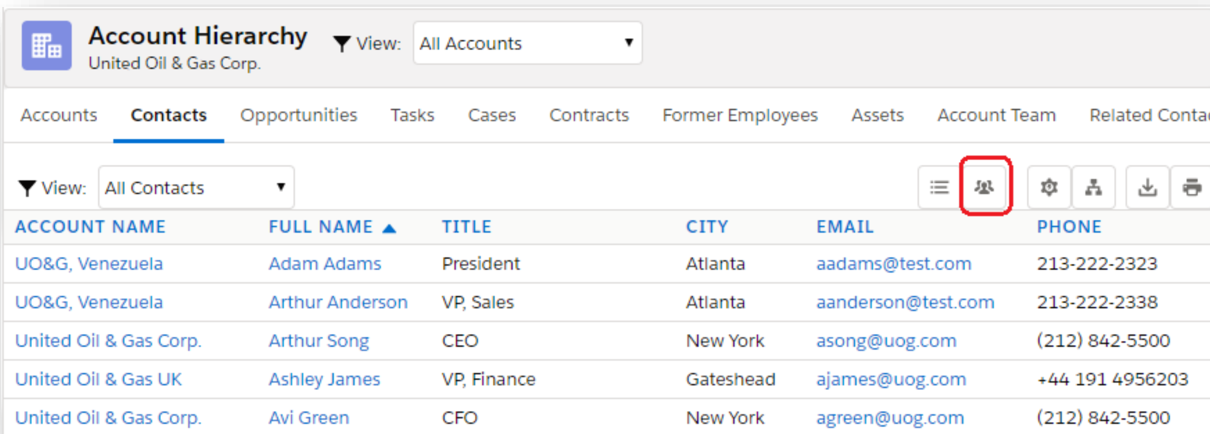
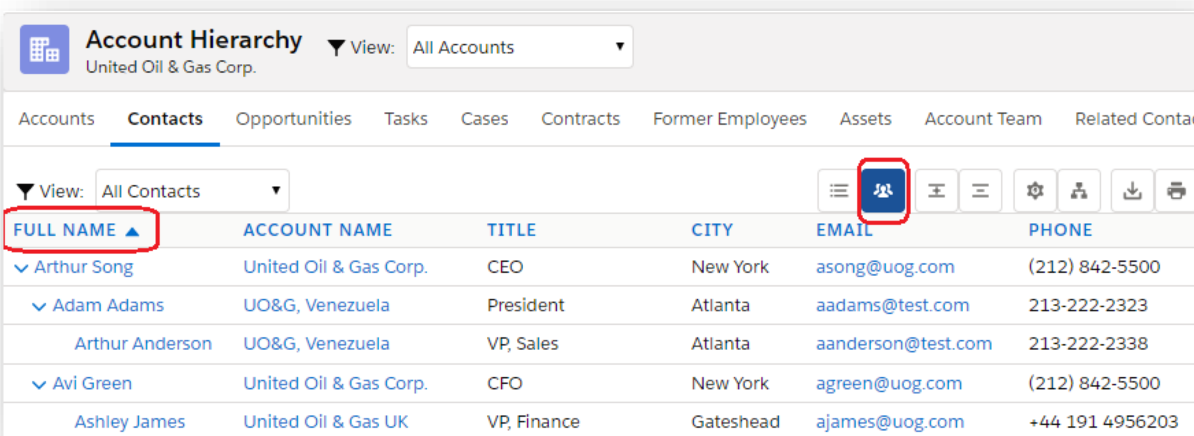
Accessing the iTools Org Chart View

To access the iTools Org Chart view, go to the Account Hierarchy page, click the Contacts Tab and then click the ‘**Org Chart’** button in the upper right hand corner.



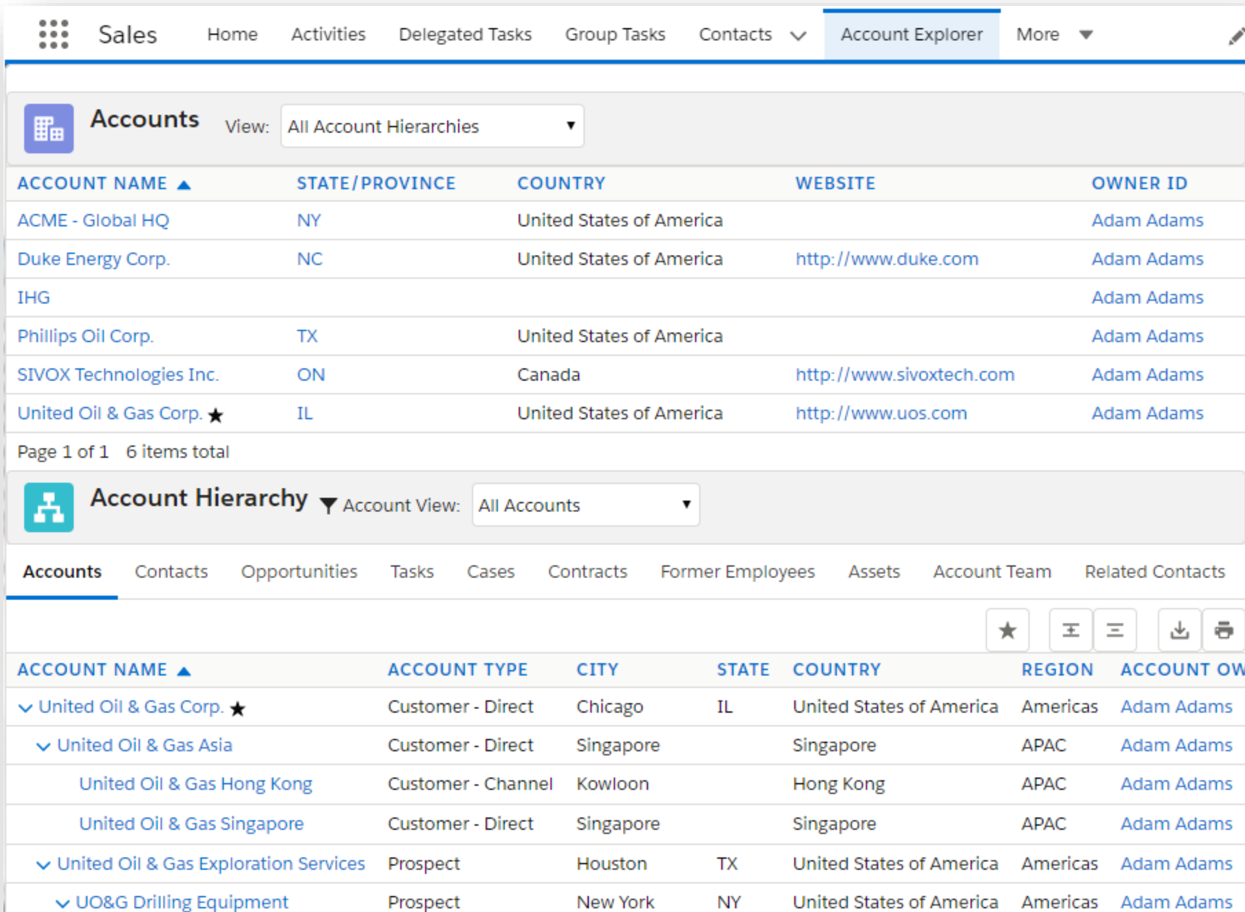
In the process of constructing the Org Chart view, the iTool will relocate the Name (Full Name) column from its specified column position to the first column in the display. The **Org Chart** button will also display with a dark blue background . To return to the standard contacts view, click on the **Org Chart** button again.



To display the Org Chart view by default whenever the contacts tab is initially displayed, set the **OrgChartInitialDisplay** iTools Setting to **Yes.**

iTools Account Explorer View

The iTools Account Explorer View provides a unique way to view Accounts and their associated Account Hierarchies – all from a single page. Use this view to search, filter and view accounts and with one click, see all the details of the account hierarchy.



There are two important steps required to set up the Account Explorer:

1. Create the Account Explorer Tab.
2. Configure the Account List View portion of the Account Explorer view.

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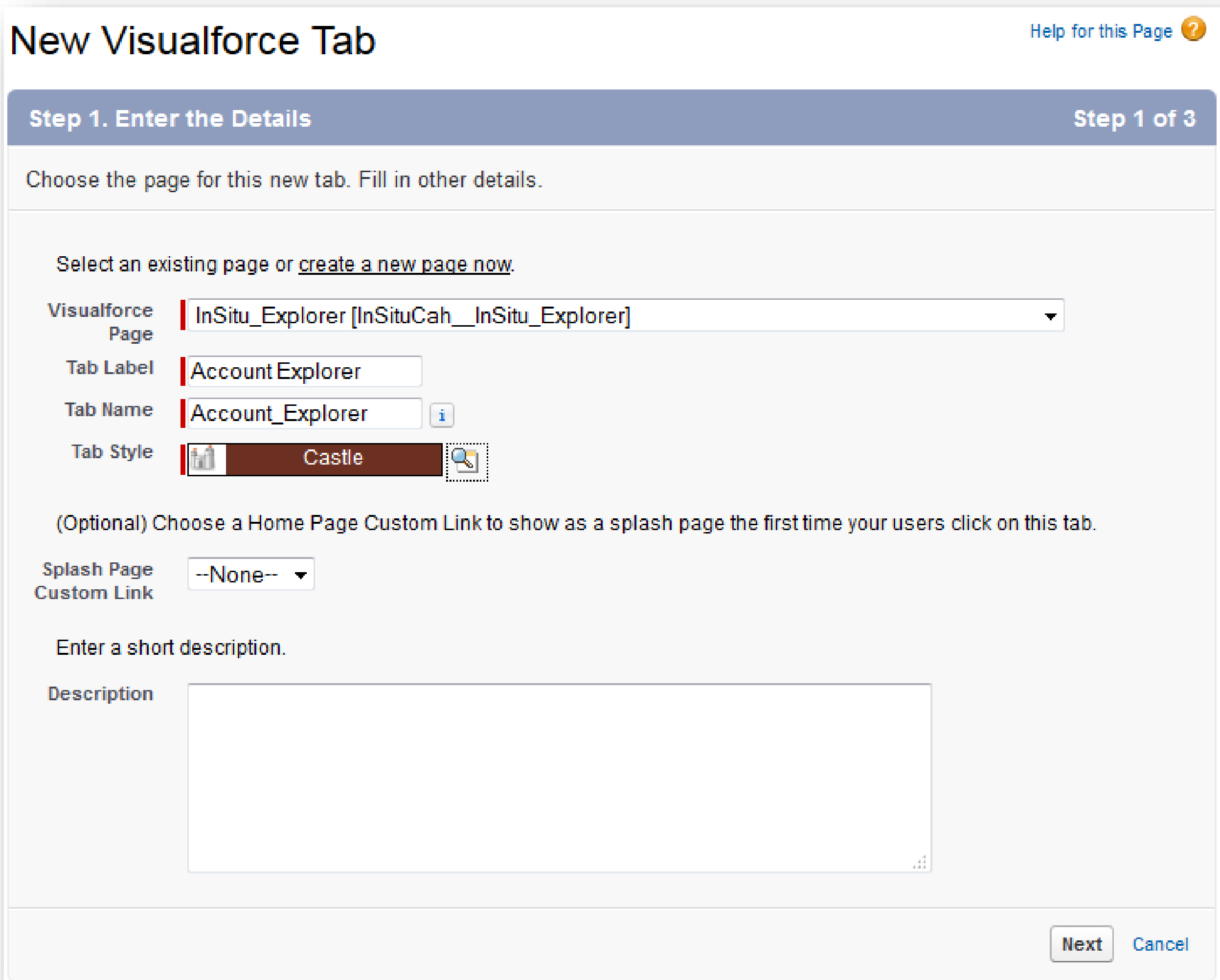
Configuring the Account Explorer Tab

Complete the following steps to create the **Account Explorer Tab**:

1. Go to **Setup > User Interface | Tabs** and click the **New** button in the Visualforce Tabs section.
2. In the **Visualforce Page** drop-down, select 'InSitu_Explorer [InSituCah__InSitu_Explorer]'.
3. Enter Tab Label and Tab Name information of your choosing.
4. Select a Tab Style of your choosing.



5. Click **Next.**

6. In **Step 2: Add to Profiles**, select the user profiles for whom the Account Explorer should be available. Click **Next.**
7. In **Step 3: Add to Custom Apps**, select the Custom Apps for which the Account Explorer should be included. Click **Save.**

Configuring the Account Explorer View

If you view the Account Explorer View immediately after you created the tab, you will notice the top section is quite sparse as only one column, Account Name, is displayed. In addition, the account list by default contains only the topmost accounts in a hierarchy. If an account is not part of a hierarchy, then it is not displayed in the account list. To make the list view more useful, you will need to:

1. Configure the Explorer component.
2. Create Explorer Tab Views.

Complete the following steps to configure the **Explorer Component**:

1. Go to the iTools Settings Tab. With the **Customizable Account Hierarchy** selected in the iTool dropdown list, locate **ExplorerComponent** item in the list and click the link.
2. The process to configure the Account list portion of the Account Explorer is the same as that used to configure a tab component in the Account Hierarchy View. For instructions on how to customize the account list see the iTools Settings ***Object*****Component** section.

Complete the following steps to create Explorer Tab Views for the Account Explorer:

1. Go to the iTools Settings Tab. With the **Customizable Account Hierarchy** selected in the iTool dropdown list, locate **ExplorerComponent** item in the list and click the link.
2. The process to configure the list views available in the Account list portion of the Account Explorer is the same as that used to configure the list views for a tab component in the Account Hierarchy View. For instructions on how to customize the tab views list see the iTools Settings ***Object*****TabViews** section.

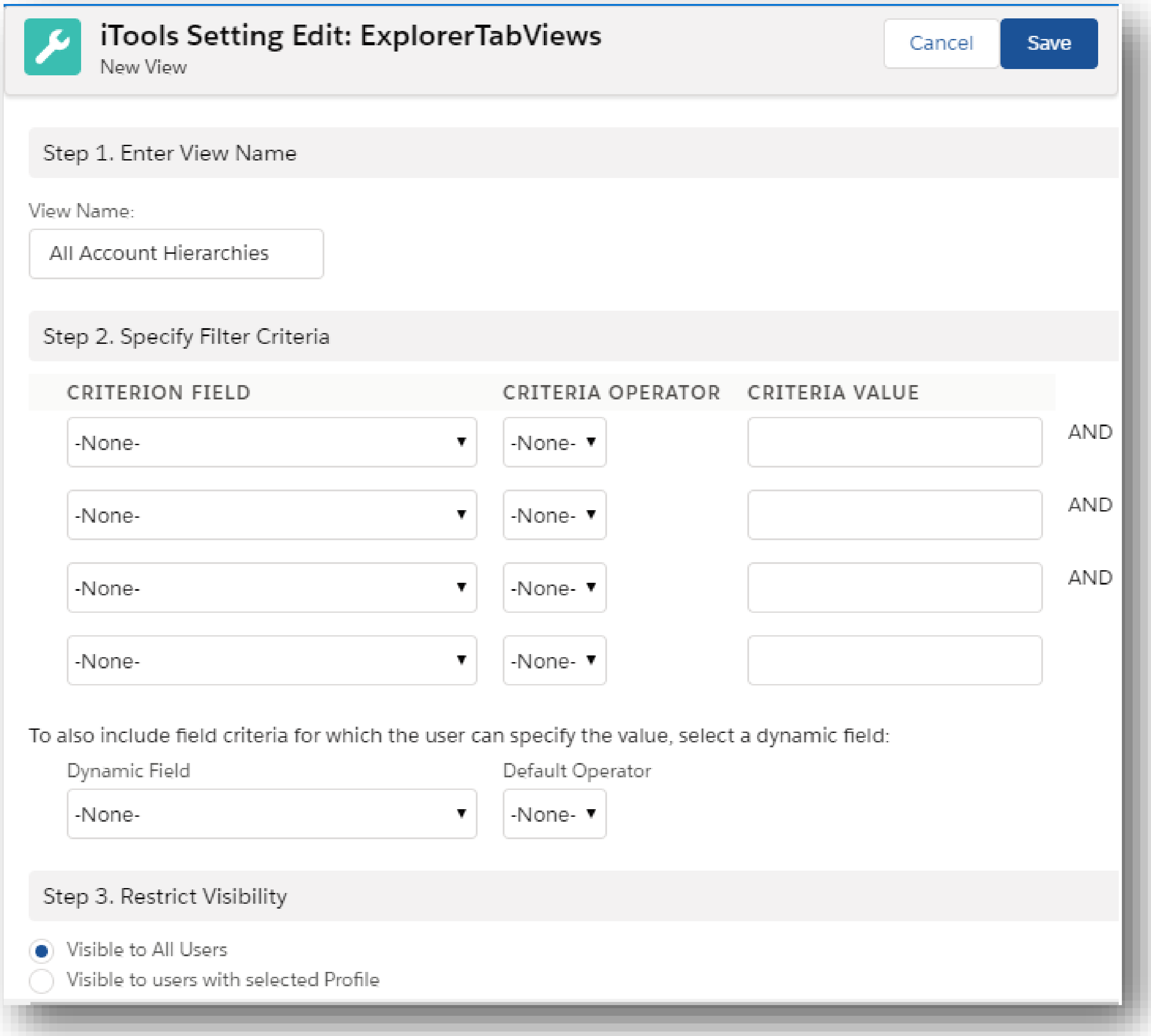
Useful Account Explorer Views

The most common and useful Account Explorer Views are:

1. All Account Hierarchies

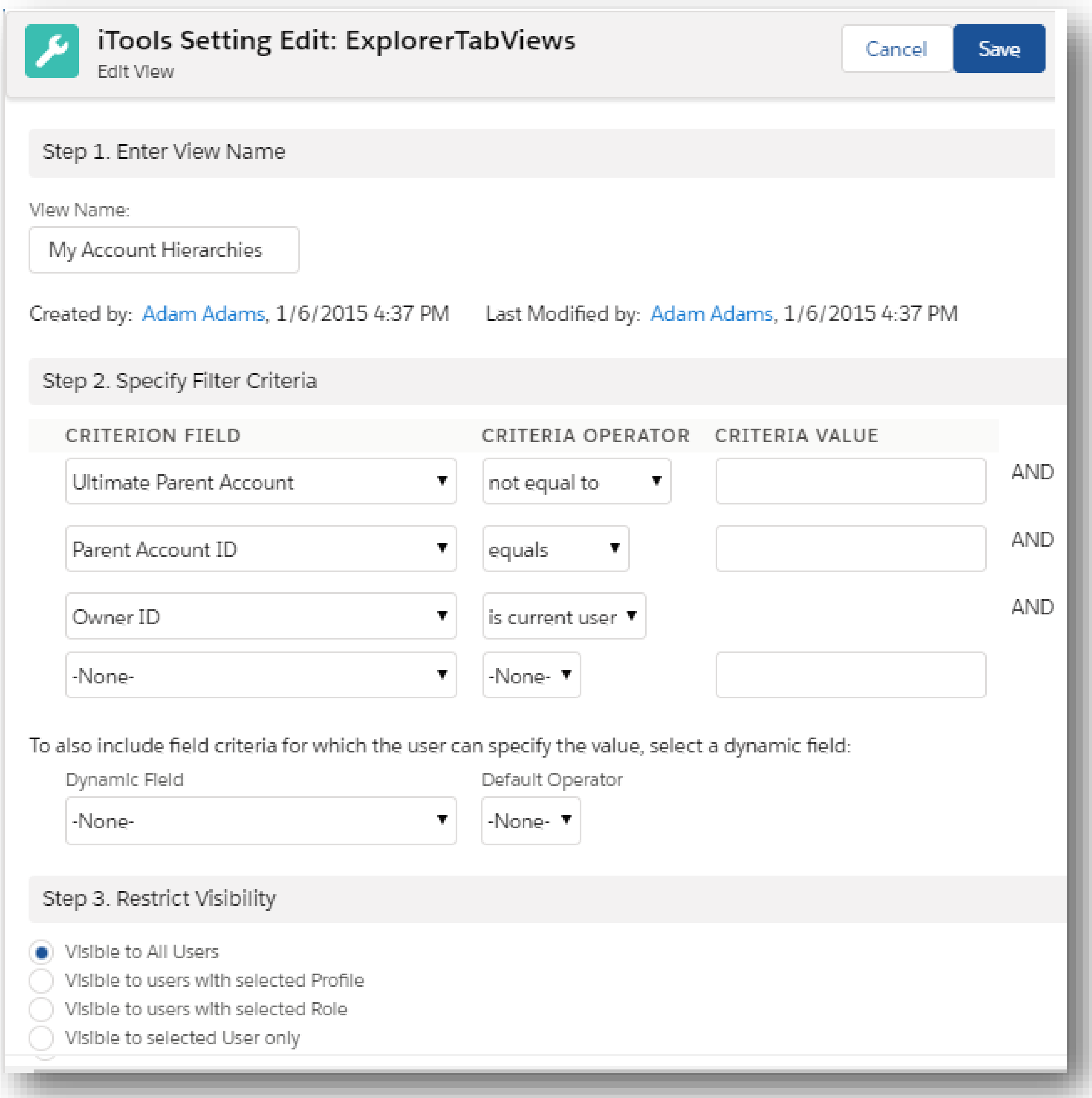
   By default, if no criteria is defined in an Account Explorer view, then the view will only display the topmost accounts in a hierarchy. Therefore, to create the **All**

Account Hierarchies list view, create a new ExplorerTabView with no filter criteria or dynamic field specified:



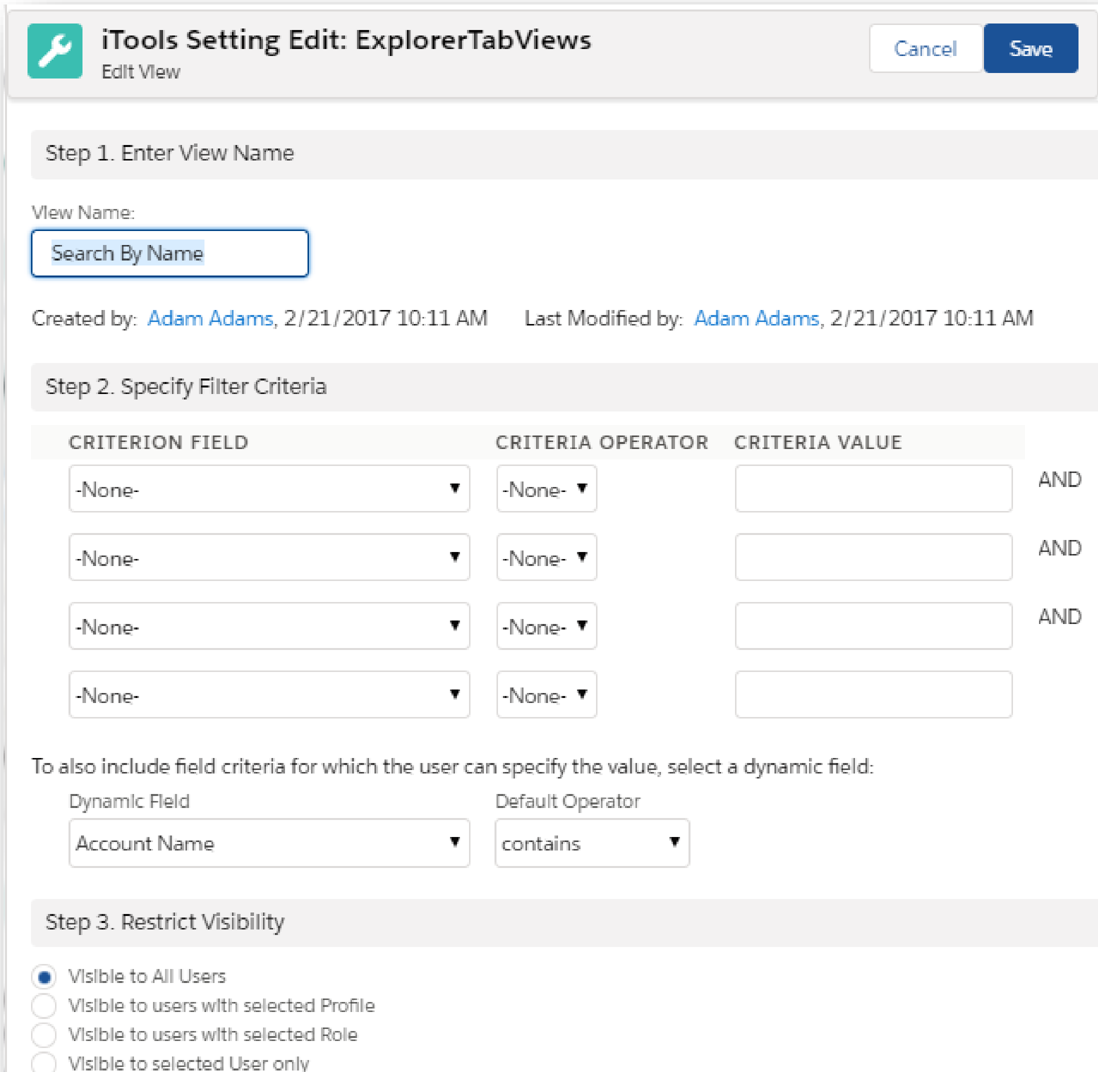
2. My Account Hierarchies

   To create a list view that displays all the topmost accounts owned by the current user, enter the following criteria:

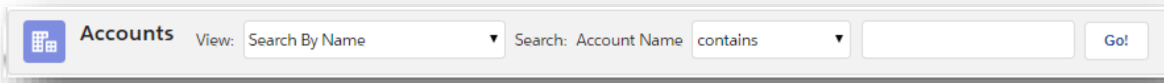


3. Search Accounts by Name

   To create a list view that allows the user to dynamically enter search criteria based on the Account Name, enter the following criteria:



When this view is selected in the Explorer Tab, then the following will display in the heading section at the top of the page:



The user can enter any text in the search field and select **Go!** to search for accounts that contains the specified text. The user can also change the operator value to dynamically vary the search criteria.

Navigating the Account Explorer View

The Account Explorer View is comprised of 3 main sections:

1. Filter and List View selection
    - Choose the list view and enter dynamic criteria as appropriate to search, filter and display accounts.
2. Account List
    - View, scroll and sort accounts displayed in the list.
    - The **current account** is marked with a black star. The associated account hierarchy and related object tabs for the **current account** are displayed in the section beneath. To set an account as the **current account**, click the account name in the account list section of the view.
3. iTools Customizable Account Hierarchy
    - View, scroll, expand, sort and perform all the same actions as is available within the iTools Customizable Account Hierarchy View.
    - This section contains the account hierarchy and related object tabs for the **current account** which is specified in the above Account List section of the Explorer view.

iTools Ultimate Parent

The iTools Customizable Account Hierarchy package provides two very important custom items: 1) Ultimate Parent custom object and 2) Ultimate Parent custom field on the standard Account object. While the Parent Account field on the standard Account object ties an individual account to its direct parent, it is the iTools Ultimate Parent field that ties together **all** accounts that are part of the same account family. In general, the iTools Customizable Account Hierarchy creates an Ultimate Parent record for each account family and associates that record with every account in the account family via the Ultimate Parent custom field. The system can easily determine which accounts belong to the same account family because each of them will reference the same Ultimate Parent record.

Best of all, the iTools Ultimate Parent information is automatically created and maintained by the iTools app – there are no manual action steps required by you or any of your users. Working behind the scenes, iTools performs its magic during two key events:

1. iTools Customizable Account Hierarchy Configuration – as mentioned in the Configuring iTools Customizable Account Hierarchy section above, a batch Apex Job is automatically started and will run in the background to create and assign Ultimate Parent values for all existing accounts that are part of an account family. You must wait until the Apex Job has successfully completed processing all batches before you make the Account Hierarchy view available to your users. See **Errors in Ultimate Parent Batch Apex Job** for details on how to properly identify and correct any errors that may have occurred during the initial configuration.
2. Update to the Parent Account field – whenever a change is made to the Parent Account field of an account record, iTools processing will automatically re-evaluate the account family structure and update the Ultimate Parent information accordingly.

The Ultimate Parent custom object and Ultimate Parent custom field on the Account object are considered system level objects and their values should not be changed by any user or process other than those provided by iTools Customizable Account Hierarchy

Useful Tips for Ultimate Parent Custom Field

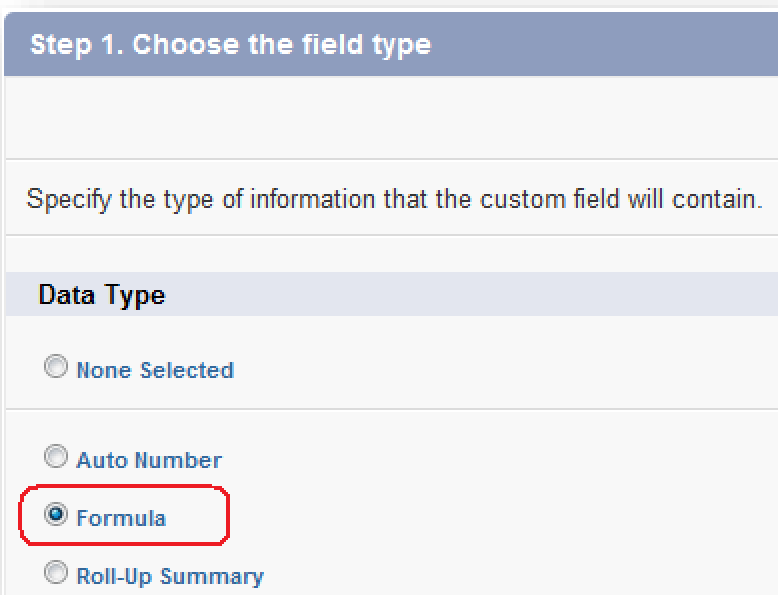
While the Ultimate Parent Custom Field is most important for the Account Hierarchy View, it can also be a valuable piece of information to show in views or to be used in reports and dashboards customized for account families.

Ultimate Parent Name Custom Field

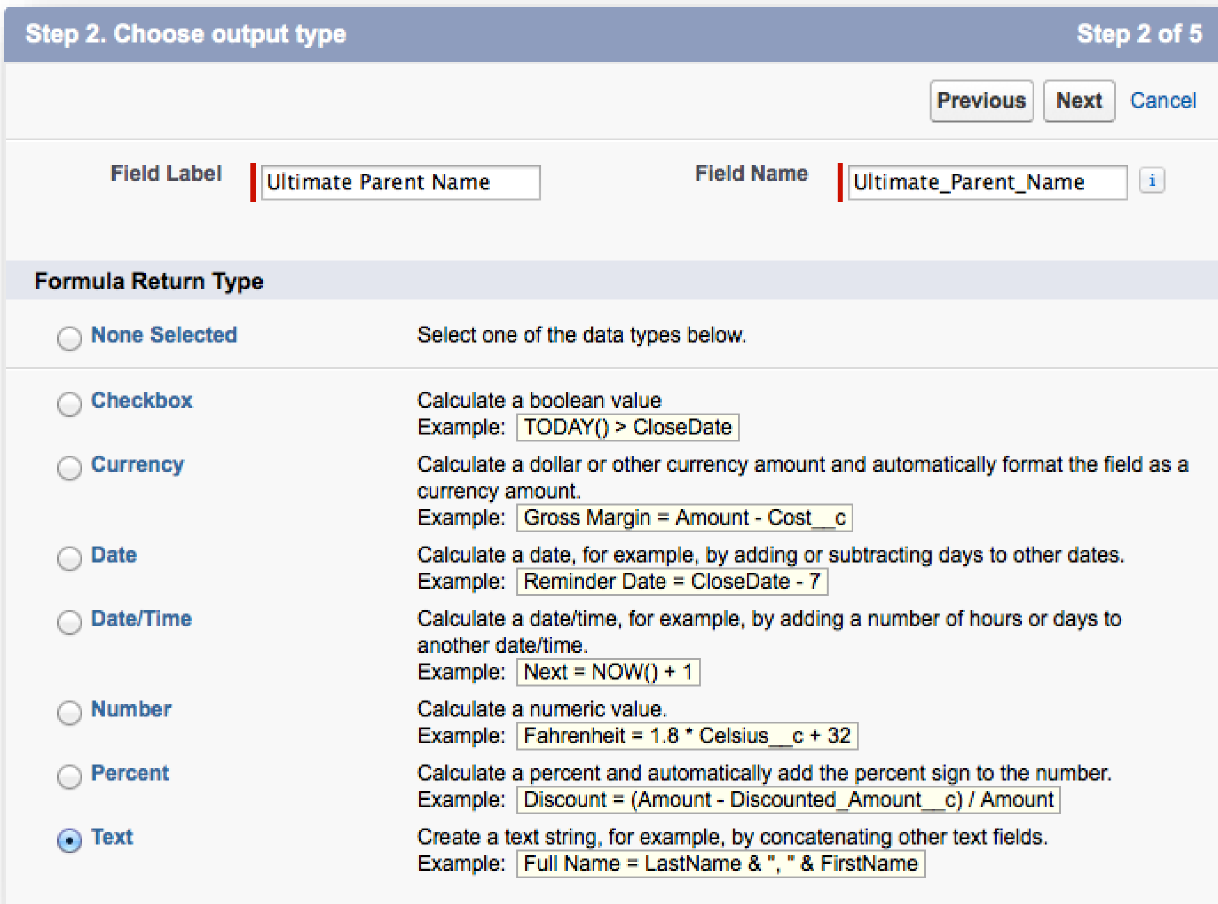
In many organizations, it is important for users to easily identify an account with its account family. So many times, the relationship between parent and subsidiary accounts is not readily apparent, especially in multi-industry conglomerates. For example, most people will recognize the brands Moen, Master Lock, Jim Beam, DeKuyper, Knob Creek, Titleist and FootJoy but would be surprised to learn they are all entities in the Fortune Brand account family.

To make the account family name available on the Account object, follow these simple steps:

1. Go To **Setup > Objects and Fields > Object Manager.** Click the **Account** link in the list, then select **Fields & Relationships** in the menu list on the left side.
2. Click the **New** button.
3. In Step 1, select **Formula** as the Data Type and click **Next.**

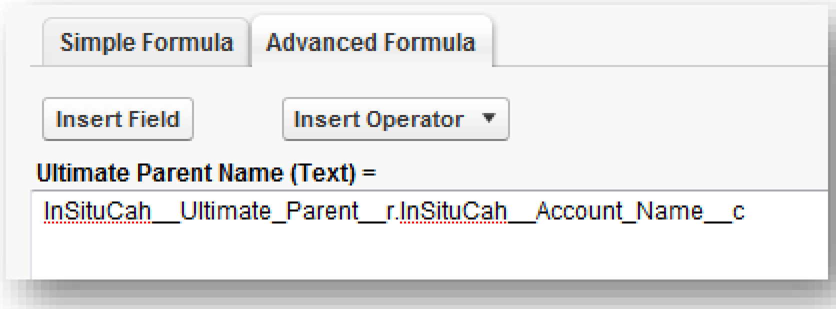


4. In Step 2, select **Text** as the Formula Return Type and enter a value in the Field Label and Field Name fields. In the example below, we have entered 'Ultimate Parent Name' as the Field Label and used the default value of 'Ultimate_Parent_Name' as the Field Name.



5. In Step 3, enter the following field reference in the Advanced Formula field.

InSituCah__Ultimate_Parent__r.InSituCah__Account_Name__c



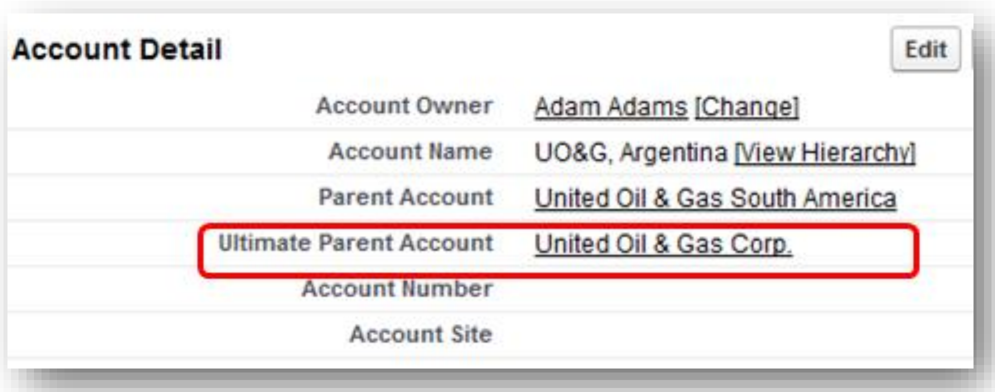
Then, enter a description and help text if you would like and click **Next.**

6. In Step 4, apply appropriate field level security and click **Next.**
7. In Step 5, select the page layouts on which you would like the new field to appear and click **Save.**

The Ultimate Parent Name field is now available to be used in Views, Reports, and Dashboards.

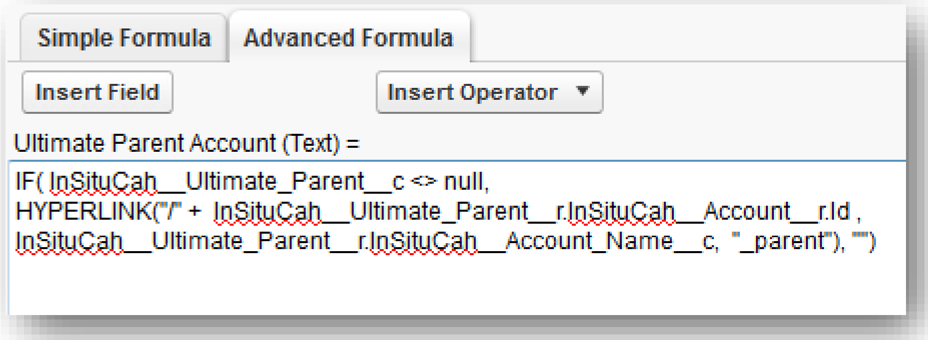
Ultimate Parent Account Custom Field

While the Ultimate Parent Name custom field is useful in defining report, view and dashboard criteria, creating an Ultimate Parent Account (link) custom field is a great way to easily view and access the ultimate parent account from the detail page of a child account. The display and behavior is the same as what is available with the Parent Account field.



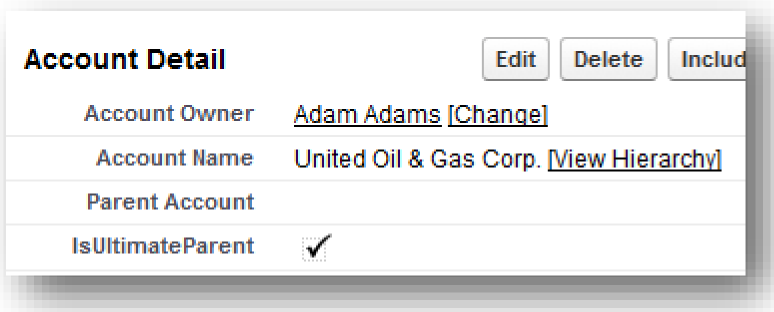
To create an Ultimate Parent Account custom field, follow the instructions above as you did with the Ultimate Parent Name custom field. However, in step 3, enter the following in the Advanced Formula field:

IF(InSituCah__Ultimate_Parent__c <> null,
HYPERLINK("/" + InSituCah__Ultimate_Parent__r.InSituCah__Account__r.Id ,
InSituCah__Ultimate_Parent__r.InSituCah__Account_Name__c, "_parent"), "")



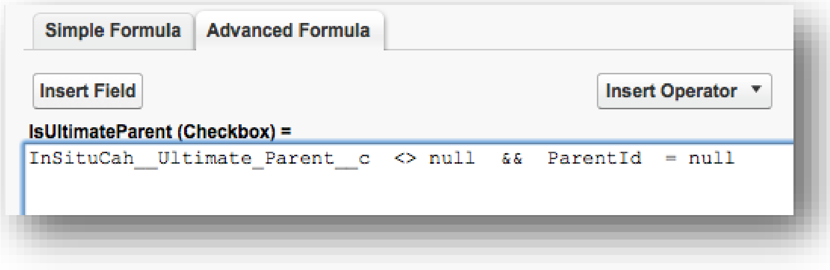
IsUltimateParent Custom Field

To easily identify whether or not an account is the ultimate parent in a hierarchy, you can create a custom formula checkbox field.



To create the **IsUltimateParent** custom field, follow the instructions above as you did with the Ultimate Parent Name custom field. However, in step 2, select 'Checkbox' and in step 3, enter the following in the Advanced Formula field:

InSituCah__Ultimate_Parent__c <> null && ParentId = null

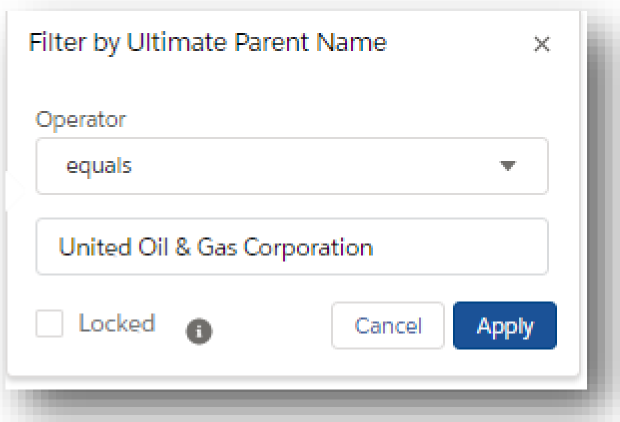


Note that iTools includes a field called Ultimate Parent Flag (InSituCah__Ultimate_Parent_Flag_c). This field is **not** intended to indicate whether an account is the topmost account in the hierarchy; it is strictly for internal processing and should **not** be used in formulas, reports, or page layouts. Instead, create an IsUltimateParent field as described above.

Account Family Summary Report

Frequently, it is the more complex organizations, such as those in multiple industries or in multiple locations that are the most difficult to manage and coordinate efforts amongst your sales team. Even though these larger organizations may separate their business across multiple entities and industries, your sales management team most likely prefers to summarize information together under the single, ultimate parent company. With the iTools Ultimate Parent and Ultimate Parent Name custom fields, it has never been easier to create reports that pull together and summarize data across all entities in an account family.

To build a report for a particular account family, simply use the Ultimate Parent Name field as criteria in the Advanced Filters section of the report definition. For example, to limit the results to only those accounts that are part of the United Oil & Gas Corporation account family, enter the following criteria:



Using this filter, you can generate an Opportunity report that contains Opportunity Sales numbers from all accounts in the United Oil & Gas Corporation family, summarized by individual account as well as in total for the entire account family.

REPORT: OPPORTUNITIES

United Oil & Gas Opportunities

Total Records: 23

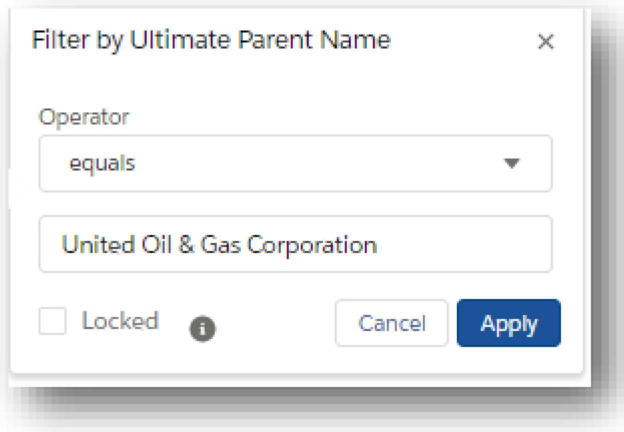
Total Expected Revenue: $2,430,750.00

Ultimate Parent Name ↑	Account Name ↑	Sum of Expected Revenue	Record Count
United Oil & Gas Corp.	United Oil & Gas Corp.	$197,500.00	2
	United Oil & Gas Exploration Services	$159,500.00	2
	United Oil & Gas Singapore	$90,000.00	1
	United Oil & Gas South America	$221,500.00	3
	United Oil & Gas UK	$243,000.00	1
	UO&G, Argentina	$81,000.00	2
	UO&G, Brazil	$138,000.00	2
	UO&G, Venezuela	$44,000.00	1
	UO&G DE Asia	$243,000.00	1
	UO&G DE Europe	$311,250.00	1
	UO&G DE North America	$465,000.00	2
	UO&G DE South America	$141,000.00	1
	UO&G Drilling Institute	$62,000.00	2
	UO&G Financial Services	$34,000.00	2
	Subtotal	$2,430,750.00	23
Total		$2,430,750.00	23

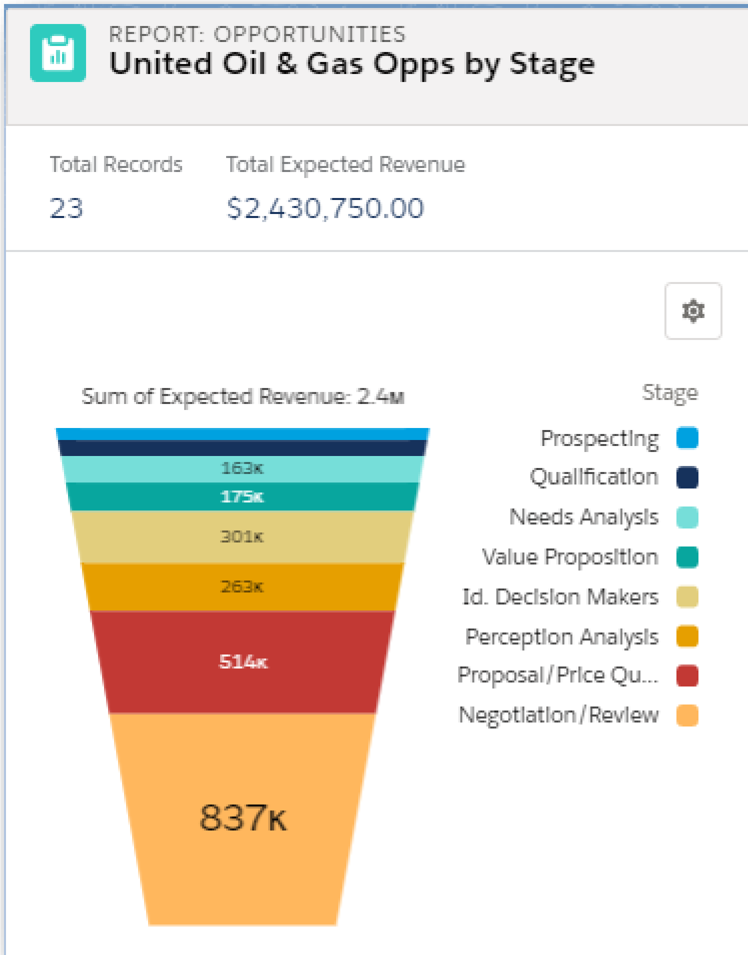
Account Family Dashboard

Just like with Account Family reports, Account Family Dashboard components can be created which help you stay on top of the various opportunities and activities associated with an account family. To build a dashboard component for a particular account family, simply use the Ultimate Parent Name field as criteria in the source report.

For example, to review the state of all the open opportunities for a certain conglomerate account, create your standard pipeline report with the following additional criteria:



Now, in a single dashboard with the addition of a simple piece of criteria, your sales team can easily stay on top of the overall status of a multi-entity account and also drill into the details to see the state of an individual account or accounts in the family.

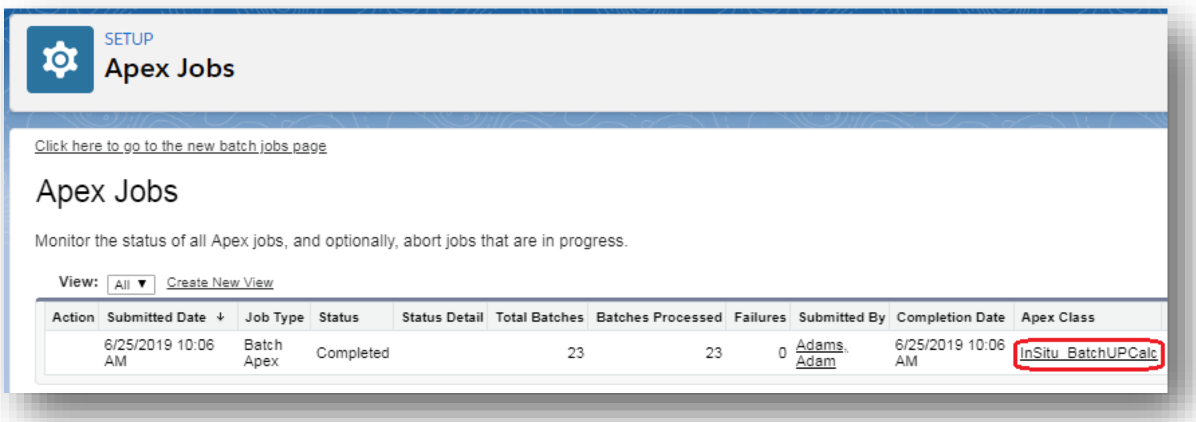

REPORT: OPPORTUNITIES
United Oil & Gas Opps by Stage
Total Records
23
Total Expected Revenue
$2,430,750.00
Sum of Expected Revenue: 2.4M
Stage
163K
175K
301K
263K
514K
837K
Prospecting
Qualification
Needs Analysis
Value Proposition
Id. Decision Makers
Perception Analysis
Proposal/Price Qu...
Negotiation/Review

Errors in Ultimate Parent Batch Apex Job

The batch Apex Job that is automatically started when you Add or Upgrade the iTools Customizable Account Hierarchy Settings must complete without errors before the Account Hierarchy view can be accessed by your users.

To check the status of the Apex Job:

1. Access the list of Apex Jobs by going to **Setup > Environments > Jobs > Apex Jobs**.
2. Locate the entry in the Apex Jobs list with the value **InSitu_BatchUPCalc** listed in the Apex Class column. The iTools Ultimate Parent Calculation will be completed when the value in the status field is **Completed** and the number in the **Batches Processed** column is equal to the number in the **Total Batches** column for all iTools Validation jobs.

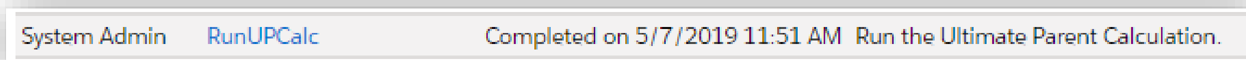


<u>**IMPORTANT**</u>: Even though the job may not report any Failures, errors still could have occurred. In version 3.12, a new and improved method for reporting errors generated during the execution of the batch Apex job was introduced. As a result, errors are no longer reported via the Apex Job status. Instead a very detailed error log is provided in the iTools **RunUPCalc** Setting.

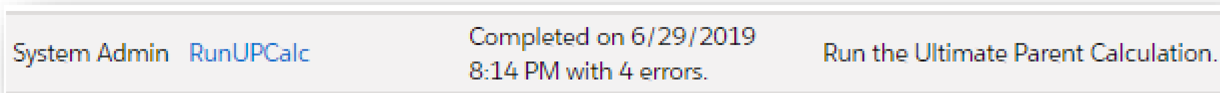
To check the results of the Apex Job in the iTools **RunUPCalc** Setting:

1. Go to the iTools Settings Tab. With **Customizable Account Hierarchy** selected in the iTool list, locate the **RunUPCalc** setting. The value column will contain the date/time the Ultimate Parent Calculation Apex Job completed. If any errors were generated during the processing, the number of errors will also be shown.

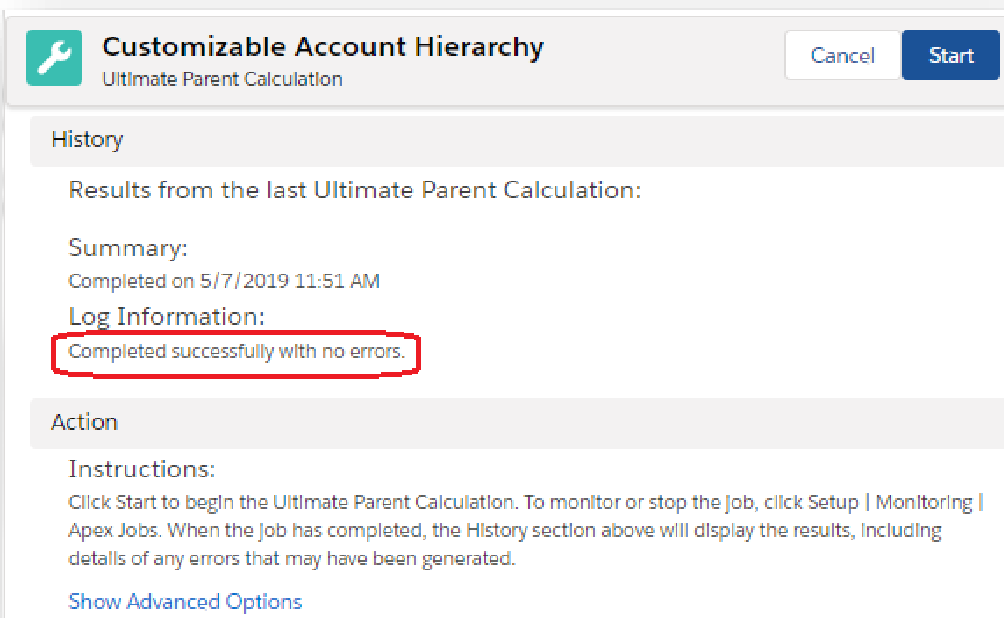
   No errors generated during the Ultimate Parent Calculation:

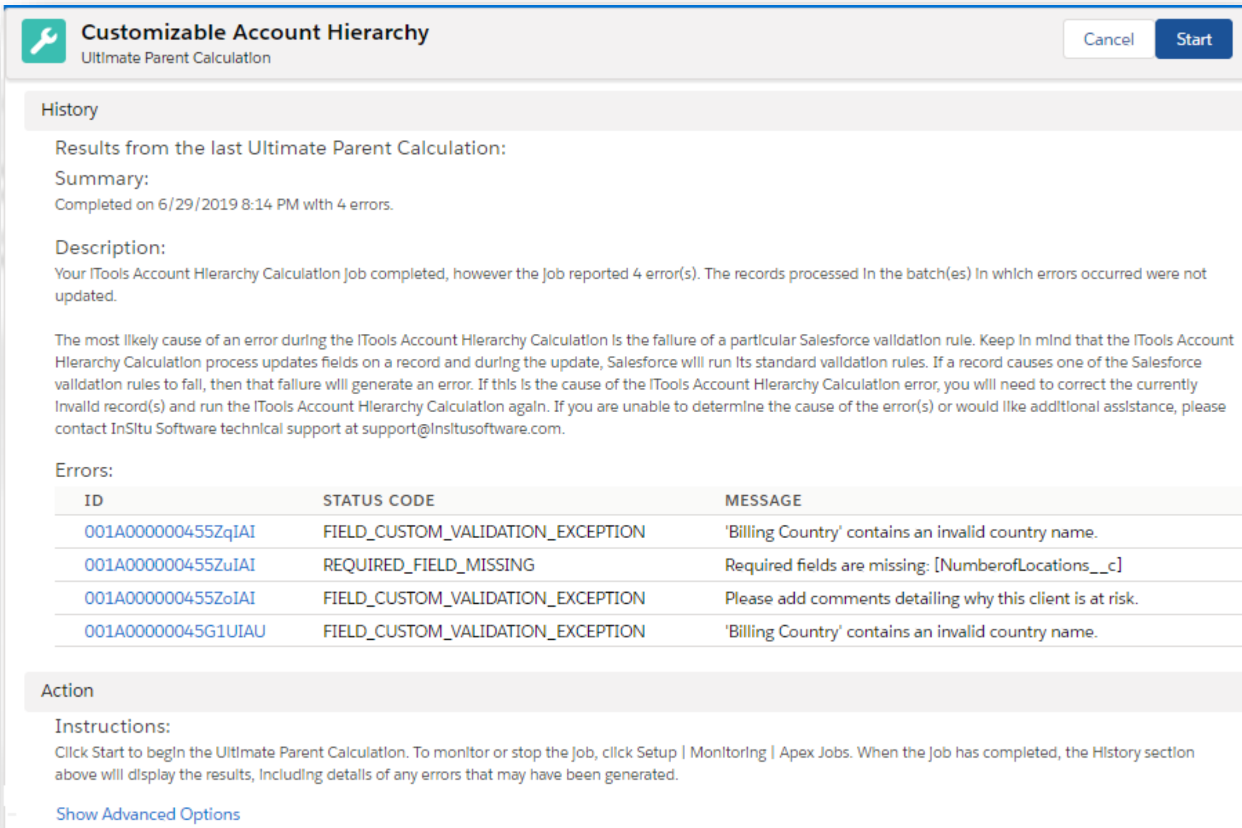
   Errors generated during the Ultimate Parent Calculation:

2. Click the **RunUPCalc** link to view the detailed results from the Ultimate Parent Calculation Apex Job. The History section displays the results from the last Ultimate Parent Calculation. Here is an example of the Ultimate Parent Calculation page after the Apex Job completed without any errors:

Here is an example of the Ultimate Parent Calculation page after the Apex Job completed with errors generated:



Customizable Account Hierarchy
Ultimate Parent Calculation

Cancel | Start

History

Results from the last Ultimate Parent Calculation:

Summary:

Completed on 6/29/2019 8:14 PM with 4 errors.

Description:

Your iTools Account Hierarchy Calculation job completed, however the job reported 4 error(s). The records processed in the batch(es) in which errors occurred were not updated.

The most likely cause of an error during the iTools Account Hierarchy Calculation is the failure of a particular Salesforce validation rule. Keep in mind that the iTools Account Hierarchy Calculation process updates fields on a record and during the update, Salesforce will run its standard validation rules. If a record causes one of the Salesforce validation rules to fail, then that failure will generate an error. If this is the cause of the iTools Account Hierarchy Calculation error, you will need to correct the currently invalid record(s) and run the iTools Account Hierarchy Calculation again. If you are unable to determine the cause of the error(s) or would like additional assistance, please contact InSitu Software technical support at support@insitusoftware.com.

Errors:

ID	STATUS CODE	MESSAGE
001A0000004455ZqIAI	FIELD_CUSTOM_VALIDATION_EXCEPTION	'Billing Country' contains an invalid country name.
001A0000004455ZuIAI	REQUIRED_FIELD_MISSING	Required fields are missing: [NumberofLocations__c]
001A0000004455ZoIAI	FIELD_CUSTOM_VALIDATION_EXCEPTION	Please add comments detailing why this client is at risk.
001A00000045G1UIAU	FIELD_CUSTOM_VALIDATION_EXCEPTION	'Billing Country' contains an invalid country name.

Action

Instructions:

Click Start to begin the Ultimate Parent Calculation. To monitor or stop the job, click Setup | Monitoring | Apex Jobs. When the job has completed, the History section above will display the results, including details of any errors that may have been generated.

Show Advanced Options

The following information is provided:

Summary – displays the date and time the job was completed and the number of errors generated.

Description – provides explanatory and guidance text to assist the user in understanding the results and taking corrective action.

Errors – lists each error including the Account ID, Status Code and error message. In most cases, these three pieces of information are enough to understand why the error was generated and what action must be taken to correct the situation. You can click the ID link to view the account that generated the error.

In addition to the status information provided in the Apex Jobs list, the system can also send an email notification with similar error information.

- If the **SendEmailOnError** iTool setting is set to 'Yes', then the notification email will be sent. Note: the user whose actions initiated the Apex Job is the one to whom the email is sent.
- If the **IncludeLinksInEmail** iTool setting is set to 'Yes', then the notification email will include links to the Account similar to the ID links that are provided in the History section's Errors list.

SendEmailOnError	Y
IncludeLinksInEmail	Y

Here is an example of the notification email that is sent when the Ultimate Parent Calculation completed with errors:

Sat 6/29/2019 8:14 PM

noreply@salesforce.com on behalf of Adam Adams

iTools Account Hierarchy Calculation - Completed with Errors

To

Your iTools Account Hierarchy Calculation request completed, however the job reported 4 error(s). The records processed in the batch(es) in which errors occurred were not updated.

The most likely cause of an error during the iTools Account Hierarchy Calculation is the failure of a particular Salesforce validation rule. Keep in mind that the iTools Account Hierarchy Calculation process updates fields on a record and during the update, Salesforce will run its standard validation rules. If a record causes one of the Salesforce validation rules to fail, then that failure will generate an error. If this is the cause of the iTools Account Hierarchy Calculation error, you will need to correct the currently invalid record(s) and run the iTools Account Hierarchy Calculation again.

Errors were reported when updating the following items:

(ID = 001A000000455ZqIAI). Status Code = FIELD_CUSTOM_VALIDATION_EXCEPTION. Error: 'Billing Country' contains an invalid country name. | To view item click here.

(ID = 001A000000455ZuIAI). Status Code = REQUIRED_FIELD_MISSING. Error: Required fields are missing: [NumberofLocations__c] | To view item click here.

(ID = 001A000000455ZoIAI). Status Code = FIELD_CUSTOM_VALIDATION_EXCEPTION. Error: Please add comments detailing why this client is at risk. | To view item click here.

(ID = 001A00000045G1UIAU). Status Code = FIELD_CUSTOM_VALIDATION_EXCEPTION. Error: 'Billing Country' contains an invalid country name. | To view item click here.

If you are unable to determine the cause of the error(s) or would like additional assistance, please contact or forward this message to InSitu Software technical support at support@insitusoftware.com.

In certain cases, the error information provided in the status detail and/or email notification can be slightly cryptic. However, there are usually a few key elements you can look for to help you identify the root cause of the issue. The most likely cause of an error during the update of an account record is the failure of a particular validation check. Keep in mind that any time a record is updated, the system will perform its normal validation checking. So, if the state of any account record that is processed by the Ultimate Parent Calculation Apex Job causes one of the validation checks to fail, then that failure will cause the Apex Job to fail.

The two most common validation checks are:

- Required Field: value must be provided when object is saved.
- Validation Rule: condition (formula expression) evaluates to 'true' when object is saved.

Important Note: When a field is added or updated to be 'required' or a validation rule is created, the system does not execute the validation check on all existing records to determine which ones are not compliant. Instead, the system will 'raise' an error on a non-compliant record the next time it is updated. Therefore, if a non-compliant record exists in your system and happens to be one that is processed by the Ultimate Parent Calculation, then that non-compliant record will cause an error to be generated. To correct the error, you must correct the non-compliant record.

If the status detail includes the phrase:	Action required:
REQUIRED_FIELD_MISSING, Required fields are missing	Add a value in the required Account field
FIELD_CUSTOM_VALIDATION_EXCEPTION	Update the field value to be in compliance with the validation rule.

Once all non-compliant Account records have been updated, the Apex Job should be re-run. To initiate the Apex Job, go to the Ultimate Parent Calculation page by clicking the **RunUPCalc** iTools Setting and clicking the **Start** button at the bottom of the page.

Import Accounts

The Import Accounts feature available in Salesforce provides the ability to import a group of Accounts using data contained in an external comma separated file. Since Import Accounts lets you include the Parent Account field in the field mapping, you are able to import a complete account hierarchy all at once. Special processing is needed by Import Accounts to create the new accounts first and then connect each account with its parent account. Unfortunately, this special processing bypasses some normal Salesforce behavior and may cause an incomplete assignment of Ultimate Parent values on certain accounts in a hierarchy.

iTools Customizable Account Hierarchy has logic in place to identify when a hierarchy has not been built correctly due to the use of Import Accounts. Therefore, after you have used Import Accounts to import an account hierarchy, you must go to any account and view the iTools Account Hierarchy. If a hierarchy does not appear to be complete, Refresh the view and the full hierarchy will display.

You can also manually initiate this 'reset' of excluded Accounts by following these simple steps:

1. Go to the iTools Settings Tab. With **Customizable Account Hierarchy** selected in the iTool list, locate the System Admin feature settings and click the **RunUPReset** link.
2. Click the **Start** button to start the Reset processing and Ultimate Parent Calculation Apex Job.
3. Review the status of the Apex Job by going to **Setup > Environments > Jobs > Apex Jobs** and then the iTools **RunUPCalc** Setting.

Large Account Hierarchies

The iTools Customizable Account Hierarchy was uniquely engineered to support very large and deep hierarchies. An important consideration in the iTool design was the implication of specific governor limits imposed by Salesforce.com which come into play when processing accounts that are part of a large hierarchy. While you may never encounter such large hierarchies in your organization, it is important to understand that subtle behavior differences and limitations do exist. These include:

1. iTools can connect up an account hierarchy of over 10,000 accounts. However, the maximum number of accounts it can display in the Account Hierarchy view is 9,950.
2. iTools can display up to 9,950 related objects, such as Opportunities, Contacts, Cases, and Tasks, associated with an account hierarchy on a component tab. If more records are available, the most recent 9,950 (based on create date) are displayed.
3. As updates are made to the Parent Account field by your users, the iTool will automatically adjust the Ultimate Parent information for that account as appropriate. If a change is made that impacts a number of accounts in the hierarchy, such as the addition or removal of a large branch of accounts, then the Ultimate Parent processing may be slightly delayed. In this case, an Apex Batch Job is used to perform the work in order to avoid encountering governor limits. Most Apex Jobs are initiated quite quickly after being queued. However, if Salesforce is experiencing a heavy load on its servers, there can be a delay before the iTools Apex Job is started. Therefore, if the iTools Account Hierarchy is not immediately up to date with the latest change to an account hierarchy, please wait a couple minutes to refresh your view. You can also monitor the status of the Apex Job by going to **Setup > Environments > Jobs > Apex Jobs.** It is located in the Administration Setup section.

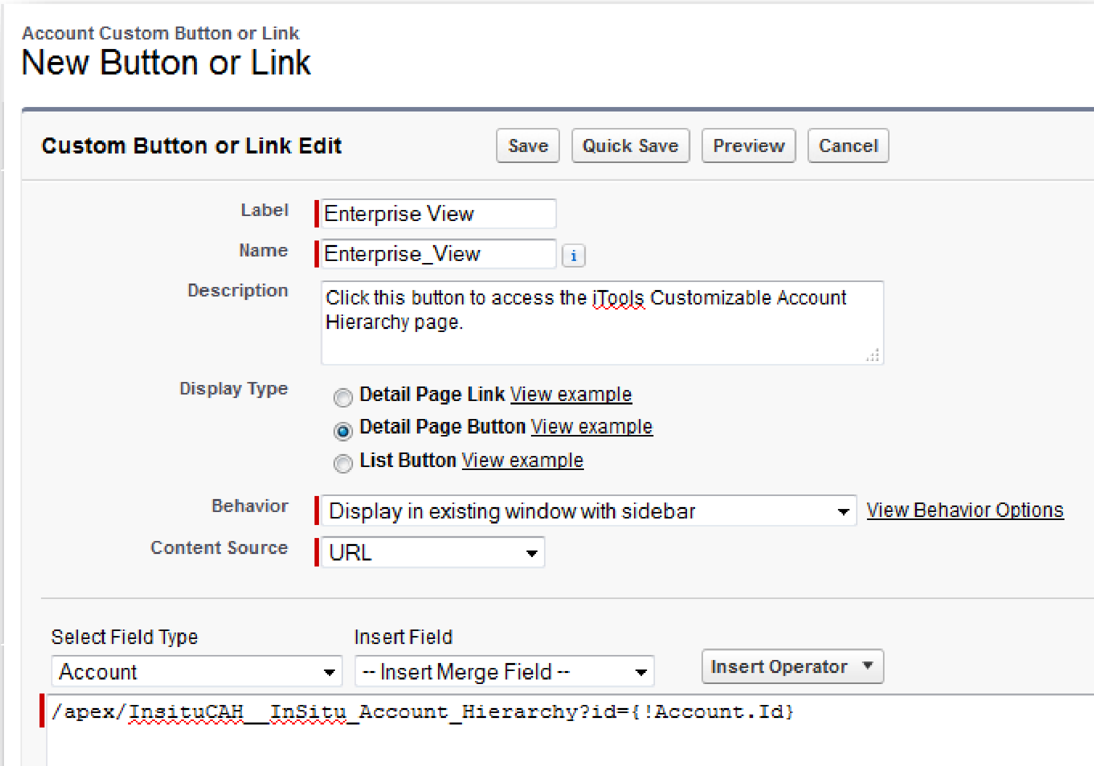
Frequently Asked Questions

How do I Change the Name of the Account Hierarchy button?

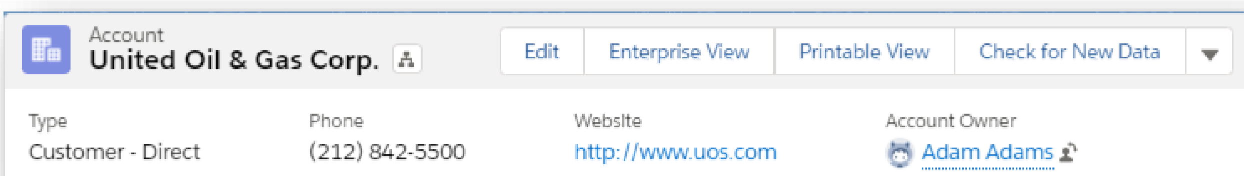
Salesforce currently does not allow the name of a custom button to be changed if that button is provided as part of an AppExchange ‘managed package’, like the iTools Customizable Account Hierarchy. Instead, you can create your own version of the Account Hierarchy button with whatever name you choose, by following these steps:

1. Go To **Setup > Objects and Fields > Object Manager.** Click the **Account** link in the list, then select **Buttons, Links, and Actions** in the menu list on the left side.
2. Click the **New Button or Link** button.
3. In the Label field, enter the text you would like displayed as the label for the button.
4. For the Display Type, select **Detail Page Button.**
5. For the Behavior option, select **Display in existing window with sidebar**.
6. For the Content Source option, select **URL**.
7. For the URL field, enter the following:

   /apex/InsituCAH__InSitu_Account_Hierarchy?id={!Account.Id}
8. Click **Save**.



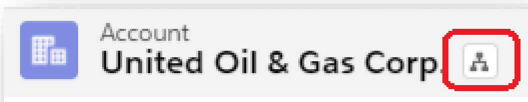
9. Add the new custom button to the Account page layouts of your choosing.



Note that your custom button will appear for all users who have access to the page layout on which it is placed regardless of whether or not the user is currently assigned a license to the iTools Customizable Account Hierarchy. If a user that does not have an iTools license clicks the custom button, they will receive an error notification and will be unable to access the View Hierarchy page.

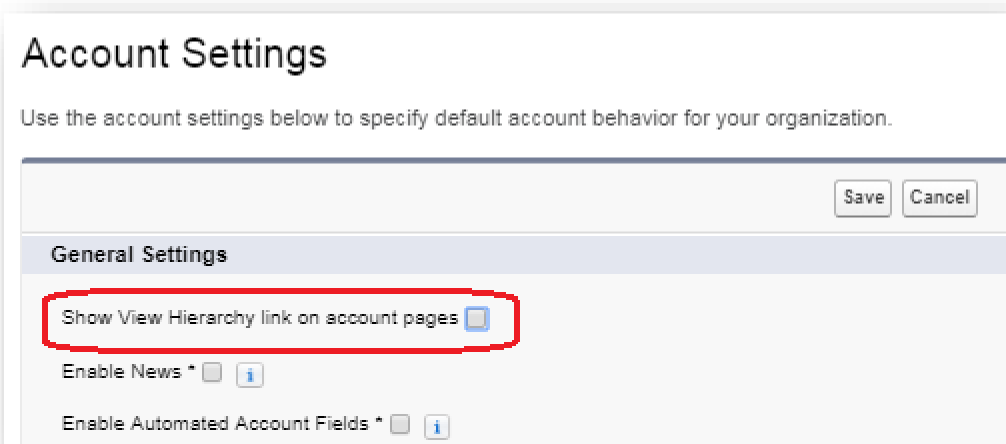
How do I Hide the Standard 'View Hierarchy' Button?

As of the Winter '14 release of Salesforce, you can now remove the 'View Hierarchy' button that is used to access the standard Salesforce hierarchy page. This will ensure only the iTools 'View Hierarchy' **button** and iTools Account Hierarchy page are used to access Account Hierarchy information.



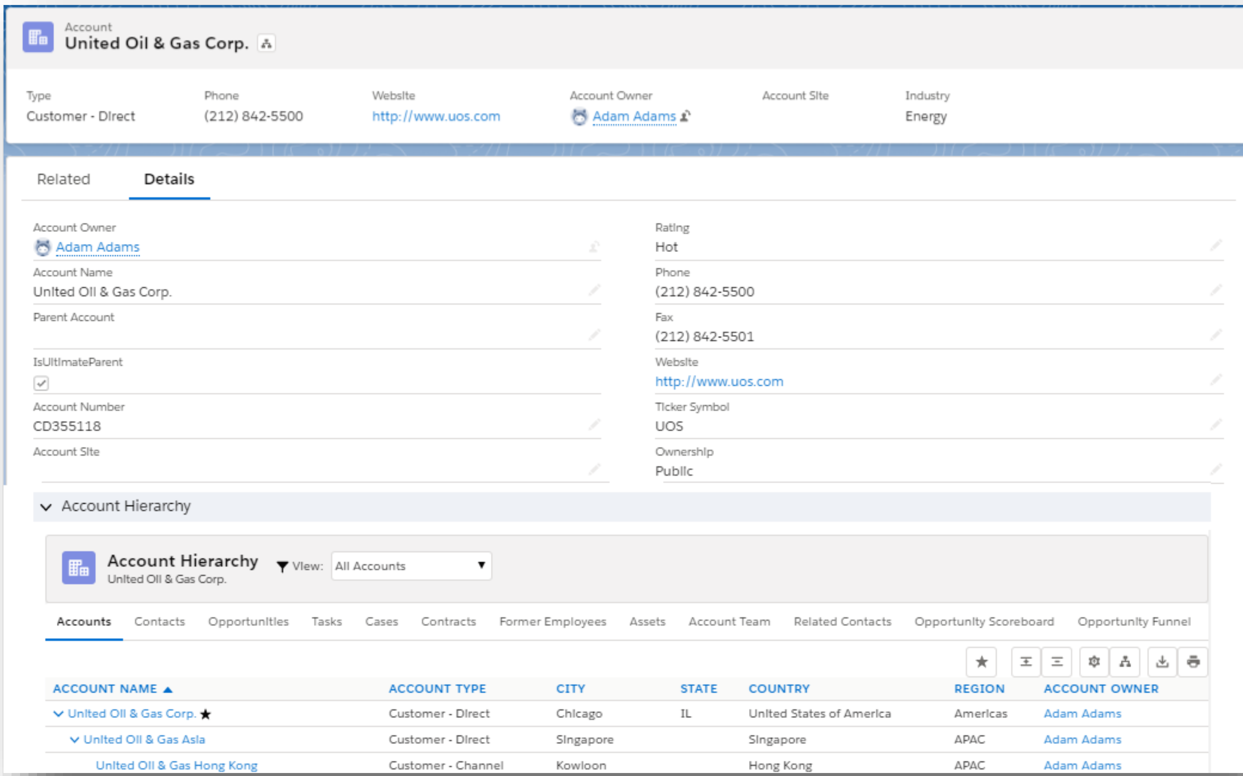
To remove the View Hierarchy link, follow these steps:

1. Go To **Feature Settings > Sales > Account Settings**
2. Click the **Edit** button.
3. Uncheck the **Show View Hierarchy link on account pages** checkbox.
4. Click **Save**.



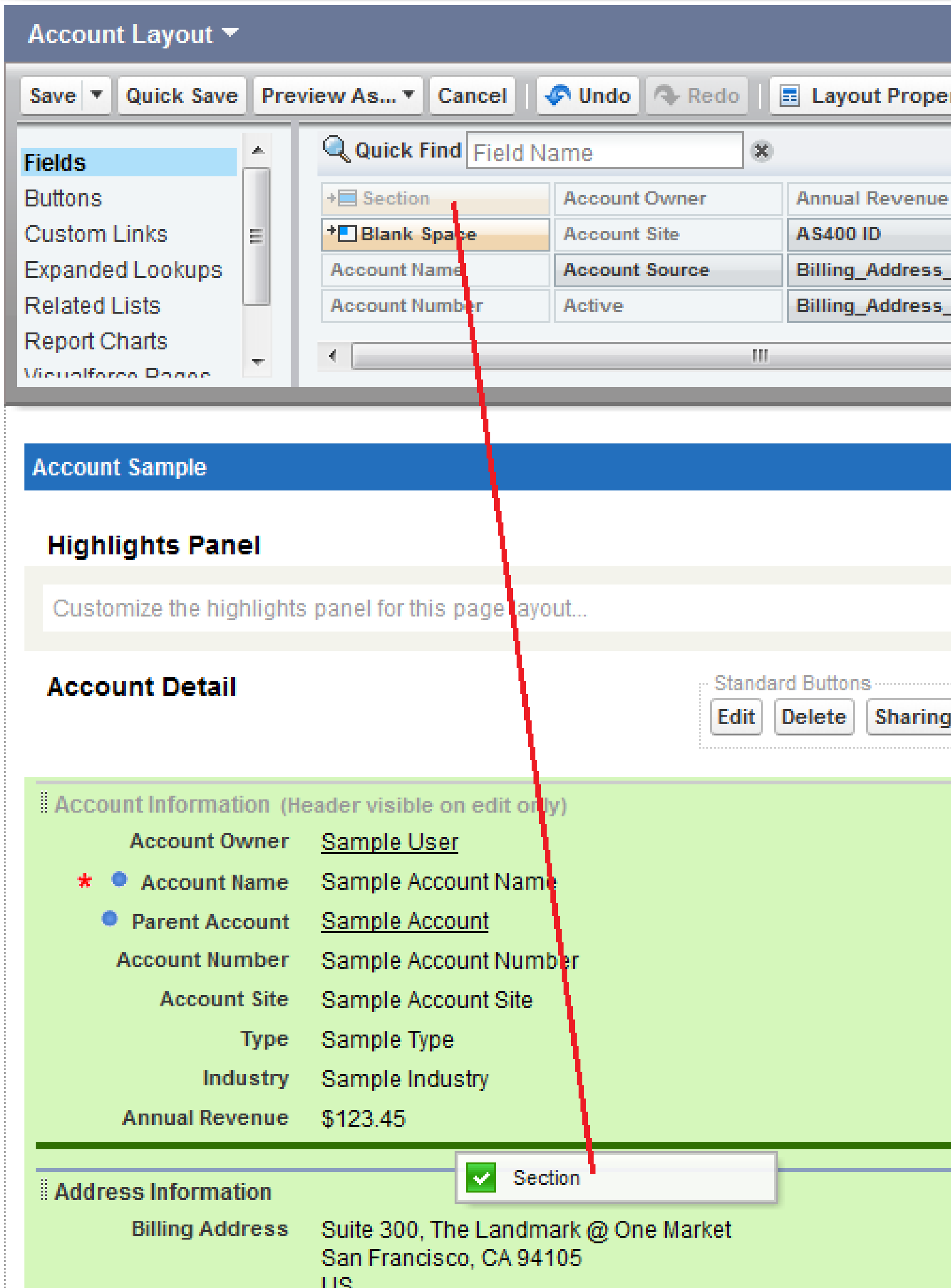
How do I Add the Account Hierarchy View to my Account Page Layout?

For convenience, your users may want to view the iTools Account Hierarchy directly on the Account details page.

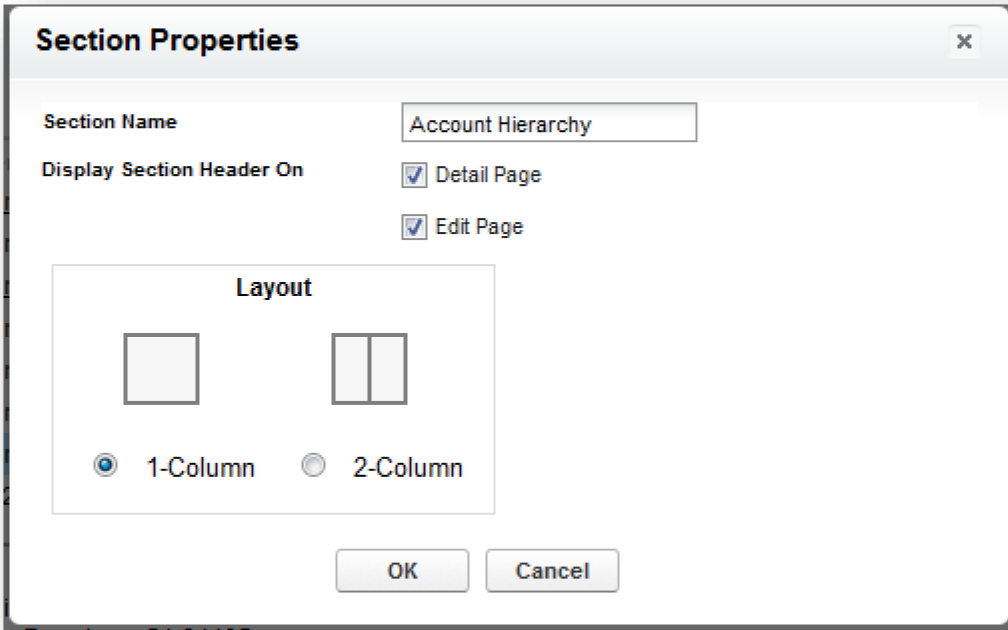


To add the iTools Account Hierarchy view to an Account Page Layout for inline viewing, complete the following steps:

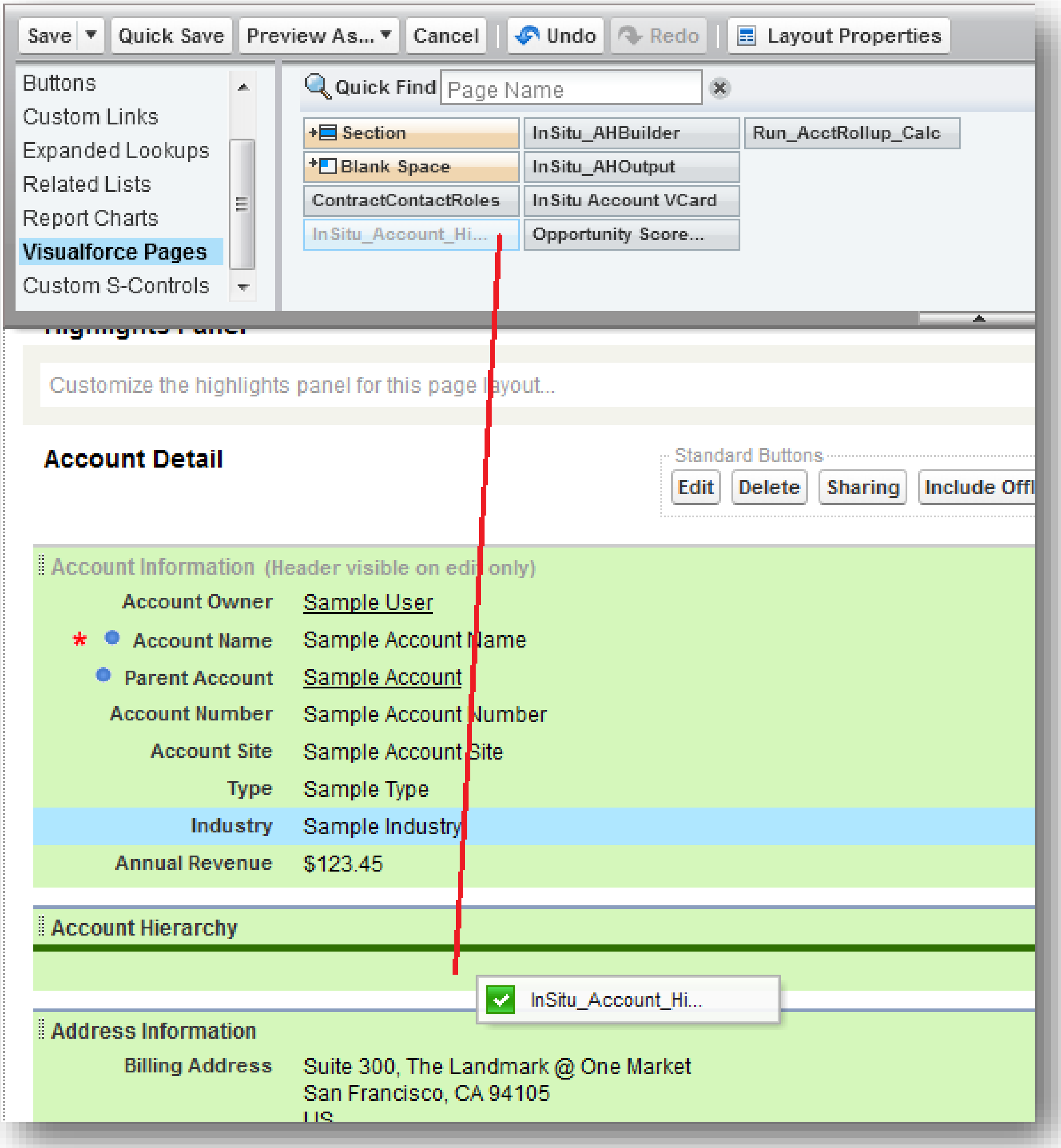
1. Go To **Setup > Object Manager > Accounts > Page Layouts**.
2. Click on the Page Layout Name for the Page Layout you want to edit.
3. Create a new section in which to place the Account Hierarchy by selecting the **Section** item in the Fields list and dragging it to the desired location on the Page Layout.


Account Layout
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Proper
Fields
Buttons
Custom Links
Expanded Lookups
Related Lists
Report Charts
Quick Find
Field Name
Section
Account Owner
Annual Revenue
Blank Space
Account Site
AS400 ID
Account Name
Account Source
Billing_Address_
Account Number
Active
Billing_Address_
Account Sample
Highlights Panel
Customize the highlights panel for this page layout...
Account Detail
Standard Buttons
Edit
Delete
Sharing
Account Information (Header visible on edit only)
Account Owner
Sample User
Account Name
Sample Account Name
Parent Account
Sample Account
Account Number
Sample Account Number
Account Site
Sample Account Site
Type
Sample Type
Industry
Sample Industry
Annual Revenue
$123.45
Section
Address Information
Billing Address
Suite 300, The Landmark @ One Market
San Francisco, CA 94105
US

4. In the Popup that appears, enter a section name and be sure to select the **1-Column** layout option. Click **OK.**

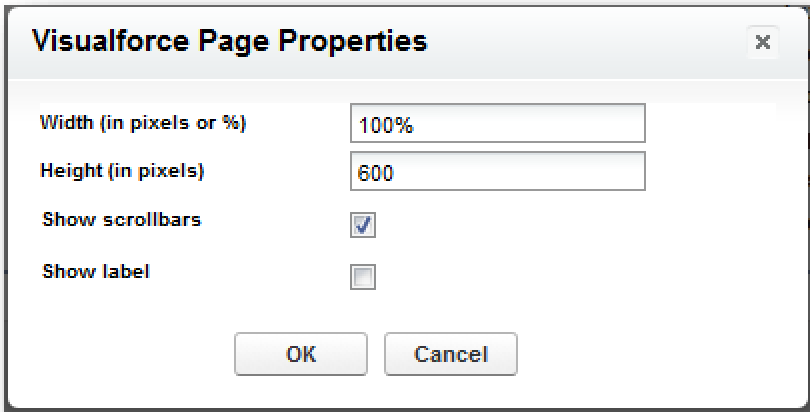


5. In the upper left hand portion of the Page Layout Editor, click the **Visualforce Pages** item, then click and drag the InSitu_Account_Hierarchy page to the newly added Account Hierarchy section.



6. Edit the page properties by hovering your mouse over the upper rightmost portion of the page section and clicking on the **wrench** icon.

7. In the popup that appears, increase the height of the page to at least 600 and check the **Show scrollbars** checkbox. Click **OK.**



8. Click **Save** to save the updates to the Page Layout.

Help and Support

Customer Focus is not just a phrase we toss around lightly at InSitu Software – it is the cornerstone of everything we do. Your success is vitally important to us. Whether you are a long-standing customer or just trying iTools for the first time with our no obligation free trial, if you are having trouble or just have a simple question we want to hear from you.

Email

This is our preferred method of providing support. It's not that we don't want to talk to you it's just that email is a much more efficient way to route your question/issue to the person who can best respond. We can also respond with more detailed instructions and screenshots.

Support@InSituSoftware.com

We are checking email all the time

Phone

If your question is easier to explain over the phone than in an email or you just want to hear a friendly voice, you can also call technical support at:

+1 (630) 557-9109

Monday thru Friday 9:00AM - 5:00PM CST