3/8/2021 Using the Salesforce Account Hierarchy



## **Using the Salesforce Account Hierarchy**



July 12, 2014

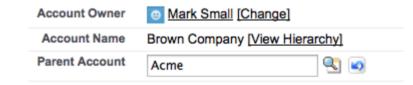
## **Using the Salesforce Account Hierarchy**

The Salesforce account hierarchy allow accounts to be related in a hierarchy by using a 'parent account' field to link them together. Once linked, the complete hierarchy structure can be viewed and links are provided to navigate directly to the accounts.

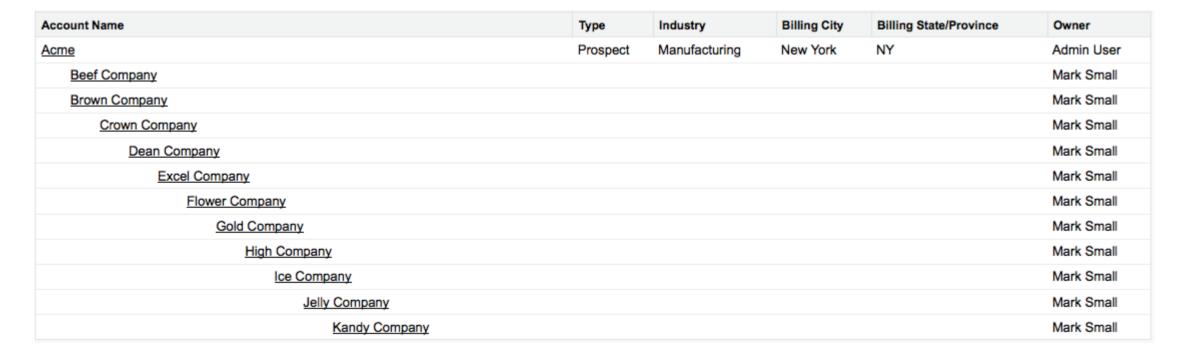
The first step is to create or identify the ultimate 'Parent' account. This is the account at the top of the hierarchy. In our example, the top level account is Acme.



Then one or more accounts are created or linked to each level of the hierarchy, using the Parent Account field. In our example, we are linking Brown Company to the top level account Acme.



Once the hierarchy has been built, the 'View Hierarchy' link can be used to view all of the accounts that have been related to each other in a separate page. In our example we have 11 levels, probably more than you would need. Accounts are indented to show the different levels.



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company at the top of the hierarchy that the ice Company belongs to. we can do this by adding a text formula held to the account object

Ultimate Parent Ultimate\_Parent\_\_c Formula (Text) 🛂

Copy the formula from the textbox below into the formula field just created. It will check up to 10 levels for the ultimate parent.

IF( LEN(Parent.Name)<1,HYPERLINK("/"&Id, Name,"\_parent"),

IF( LEN( Parent.Parent.Name ) < 1, HYPERLINK("/"&Parent.Id, Parent.Name,"\_parent"),

IF( LEN( Parent.Parent.Parent.Name )<1,HYPERLINK("/"&Parent.Parent.Id,Parent.Parent.Name,"\_parent"),

IF(LEN(Parent.Parent.Parent.Parent.Name)<1, HYPERLINK("/"&Parent.Parent.Parent.Id, Parent.Par

IF( LEN( Parent.

IF( LEN( Parent.Parent.Parent.Parent.Parent.Parent.Parent.Name )<1, HYPERLINK("/"&Parent.Pare

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IF( LEN( Parent.

IF( LEN( Parent.

Here is the account page layout with the 'Ultimate Parent' field added. As Acme is the top level, it is listed as the ultimate parent.

Account Owner

Account Name
Acme [View Hierarchy]

Parent Account

Ultimate Parent

Acme

Here is an example of how the ultimate parent formula works at one of the levels of the hierarchy. The Jelly company has a parent of the Ice Company and the ultimate parent is displayed correctly as the Acme account.

Account Owner Mark Small [Change]

Account Name Jelly Company [View Hierarchy]

Parent Account Ice Company

Ultimate Parent Acme

Our formula stops at 10 levels, so for the Kandy company, a message is displayed that the ultimate parent is beyond 10 levels.

Account Owner

Mark Small [Change]

Account Name

Kandy Company [View Hierarchy]

Parent Account

Jelly Company

Ultimate Parent

Ultimate Parent Beyond 10 Levels

Some things to keep in mind when using the Account hierarchy:

• The parent account hierarchy is not supported for person accounts

Accept

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- A Custom Report Type will be needed to report on hierarchies more than one level deep
- The "View Hierarchy" page is not editable. This means you are cannot change the columns that are displayed e.g. Type, Industry, Billing City, Billing State and Owner. If you do want a custom view you will need to create a custom Visualforce page or look for an app in the AppExchange.
- One account can't have multiple direct parents

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