





Using the Salesforce Account Hierarchy

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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.

Account Owner	 Admin User [Change]
Account Name	Acme [View Hierarchy]
Parent Account	


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.

Account Owner	 Mark Small [Change]
Account Name	Brown Company [View Hierarchy]
Parent Account	<input type="text" value="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.

Account Name	Type	Industry	Billing City	Billing State/Province	Owner
Acme	Prospect	Manufacturing	New York	NY	Admin User
Beef Company					Mark Small
Brown Company					Mark Small
Crown Company					Mark Small
Dean Company					Mark Small
Excel Company					Mark Small
Flower Company					Mark Small
Gold Company					Mark Small
High Company					Mark Small
Ice Company					Mark Small
Jelly Company					Mark Small
Kandy Company					Mark Small

company at the top of the hierarchy that the Ice Company belongs to. We can do this by adding a text formula field to the account object.

Ultimate Parent	Ultimate_Parent__c	Formula (Text) 
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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.Parent.Parent.Name,"_parent"),

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

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


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

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


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

IF( LEN( Parent.Parent.Parent.Parent.Parent.Parent.Parent.Parent.Parent.Parent.Name )<1 ,HYPERLINK("/"&Parent.Parent.Parent.Parent.Parent.Parent.Parent.Parent.Parent.Id,Parent.Parent.Parent.Parent.Parent.Parent.Parent.Parent.Parent.Name,"_parent"), "Ultimate Parent Beyond 10 Levels")))))))
```

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	 Admin User [Change]
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

The parent account hierarchy is supported for 500 accounts.

- 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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