DataTrim Account Organizer - Installation, Setup and Users Guide

List of Content

d2b International ApS– Kostskolevej 5-7 - 2880 Bagsværd – Denmark

Updated: 19. April 2023

1 Introduction

1.1 About this Document

Thank you for registering for the DataTrim Account Organizer solution.

Although we have tried to make our solution as intuitive as possible and focused on making it simple to use, by hiding a lot of the usual technical data matching concepts and terminology behind the scenes, we realize that there are certain elements in the concept and particular with regards to the setup that makes this solution unique and therefore needs further explanation.

In this document you will find the instruction for how to install and setup the solution.

Please feel free to contact us at info@datatrim.com for details if you have any questions to this guide or feedback, which is much appreciated.

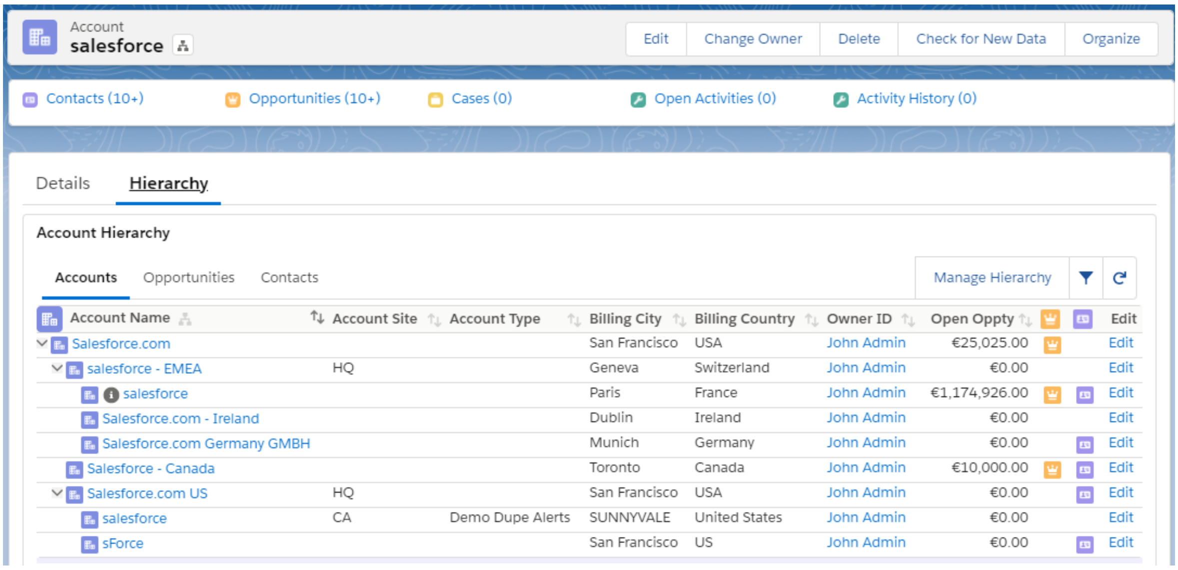
1.1.1 Bookmarks used in this document

To help you identify key pieces of text we have put bookmarks in the margin throughout the guide:

This bookmark indicates a **tip** or a good idea which can save you a lot of time.

This is **important information** which you should consider reading carefully because the info will help you understand the fundamentals of our solution.

2 Interactive Account Hierarchy



2.1 Inline Account Hierarchy

The Account Hierarchy for any given Account/organization can be displayed directly on the Account Page Layout.
This Visual Force page, will not only give the account manager a full overview of all accounts with the organization, but also allow the user to easily modify, organize, and rearrange the organization to increase accuracy in reporting, forecasting and account planning.
The current account and its position in the hierarchy is highlighted by the grey info icon.

The Fields/Columns displayed[1] can be customized, and even include custom fields, or formula field to represent e.g., total amount of Open Opportunities.

You can place the Account Hierarchy directly on the detail page of the Account or in a separate tab as illustrated above.

2.1.1 Opportunities & Contacts links/icons

The Inline Account Hierarchy gives the user direct access to Opportunities and Contacts.
The 2 Right-most columns are click-able images which will navigate the user directly to the Opportunity and Contact section of the given account respectively.
The icons are only displaying if there are Opportunities/Contact for the account.
If you move your mouse over the icons, you will get a pop-up which tells you how many Opportunities/Contacts there are.

2.1.2 Action Buttons: Manage Hierarchy, Apply Filter & Refresh

Three action buttons are added to allow the user to navigate to the main Account Organizer page for making changes to the hierarchy, apply a filter to the displayed hierarchy, or simply refresh the list after changes are made.

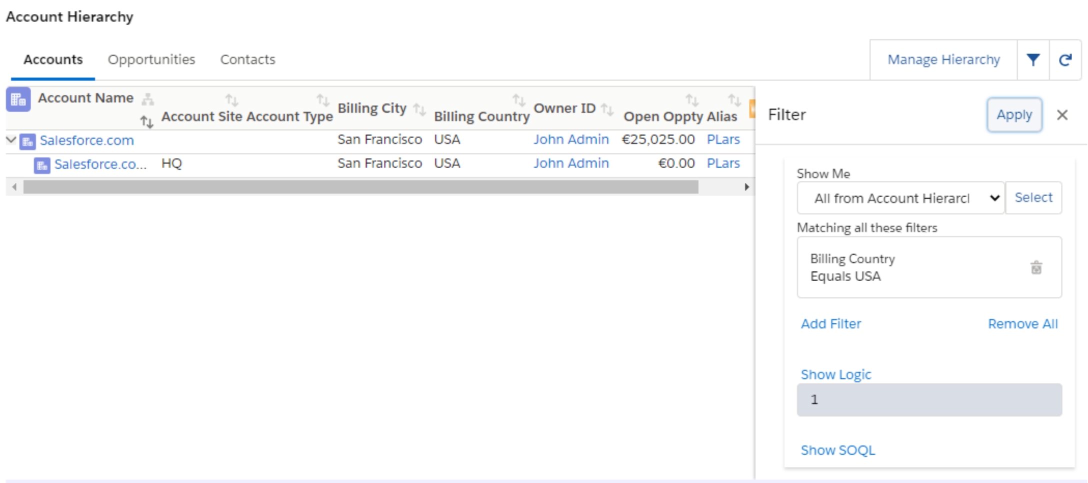
[1] You can change the fields/columns in the search result by modifying the FieldSet on the Account: https://na1.salesforce.com/p/setup/custent/FieldSetListUI/d?tableEnumOrId=Account&setupid=AccountFieldSets

These buttons can be hidden from the user if organizations want the management of the hierarchies to be limited to admins or other data stewards.

2.2 Sorting and Filtering

To better manage and navigate large hierarchies, you can sort the hierarchy column by column, or collapse sub-parts of the hierarchy to only display the parts you are interested in.

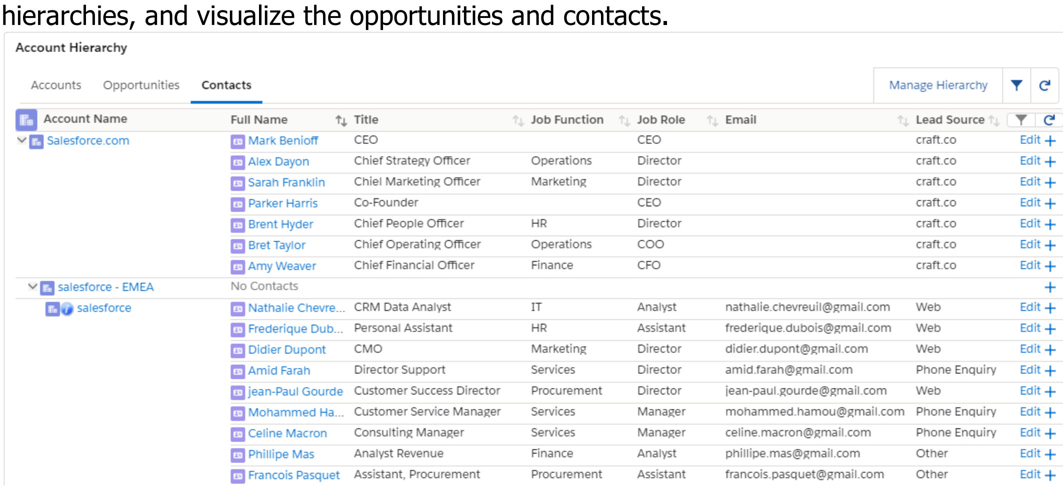
Using the filter, you will be able to reduce the hierarchy by only displaying a subset of the hierarchy. E.g. Display only Open Opportunities and active Contact which doesn't have an opt-out etc.



To optimize the display of large hierarchies, you can even define default filters for Account. Opportunities and Contacts, so that the default view always will be limited to displaying certain records.

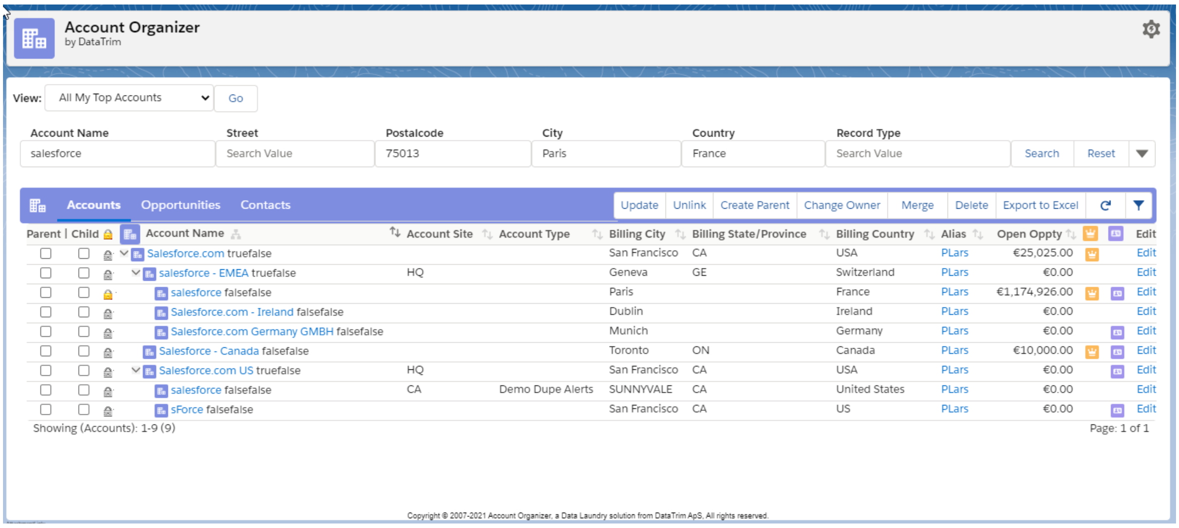
2.3 Opportunity and Contact Tabs

By adding the Opportunity and/or Contact Tabs, you can with a single click expand the hierarchies, and visualize the opportunities and contacts.



Using the actions to the far right, you will be able to edit or add new records with a single click.

3 Account Organizer Main Screen



The Main screen is built into 2 sections, the upper section which includes your options for searching and applying Advanced filters in order to get the targeted accounts displayed in the lower section.
In the lower section you will see the result of the Account search, and action buttons help manage your accounts and their hierarchies.
On the Opportunity and Contact Tab, you will see the Opportunities/Contacts for the displayed Accounts, with their own set of action buttons.

The Account Organizer Main Page is based on a single Visual Force Page.

3.1 Built-in Views

All My top Accounts, is your main view to manage your Major/Global Accounts.
This view will identify all Accounts, owned by you, who does not have a parent (i.e. is at the top level) AND at the same time have one or more child accounts (i.e. is a parent).

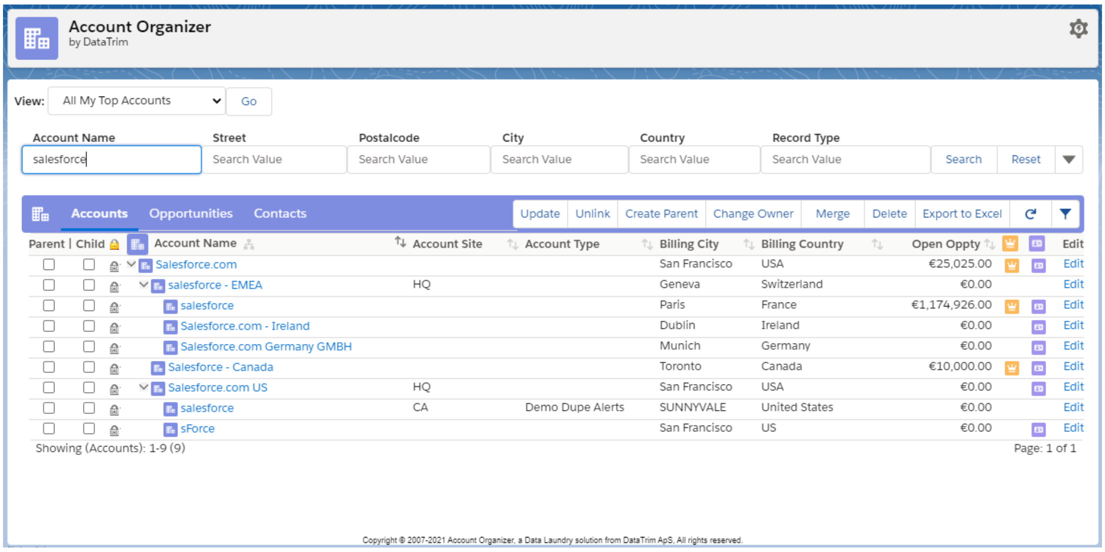
This view is designed to give the Account Manager a quick view on his top accounts, and drill down to each one of them and expand the hierarchy details.

Note: A configuration parameter Query Limit will limit the maximum number of records to return from the lists, including the list views. You may want to increase the default value, but the limit is in place to avoid too long SOQL statements when looking for parent, grandparents etc.

3.2 Searching for Accounts

In the upper part of the page, you have your search and filter options.
The first row contains your search criteria. Enter your search values to search for accounts.
The Account Organizer will automatically apply sophisticates search algorithms to help find account where e.g., the spelling may slightly different etc.

The Search will not exclusively find records which match your search values, but it will try to find records with common values.



If you arrive on the Account Organizer page from the Account Detail page, using e.g. the Manage Hierarchy buttons, the search fields are automatically populated.
The Hierarchy displayed will only contain the current hierarchy (if any).
Click the Search button to initiate a wider search and find accounts not currently linked to the hierarchy, but which could potentially be part of a larger group of companies.

3.2.1 Filtering

If your search generated too many results for you to manage, or if you simply are working with very large hierarchies, you make take advantage of the Filter function to reduce the scope of the search and accounts being displayed.

Use the filtering function to **limit the search**, e.g. by limiting your search to a specific country etc.

Example:

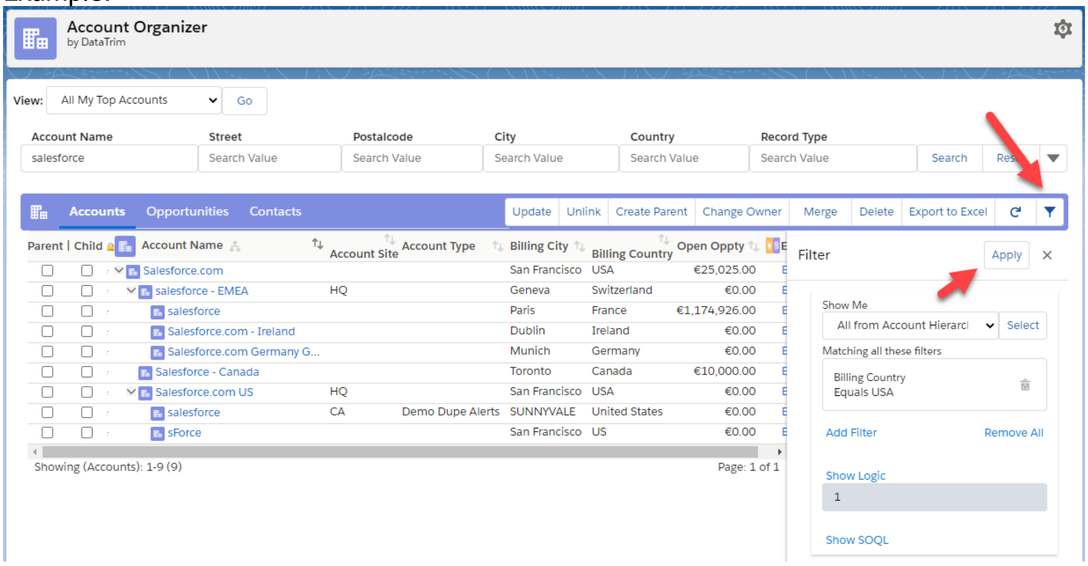


Image: Building a filter.

When applying a filter value, only records which matches your filter are included. Note in the example below the salesforce account in Paris remains,

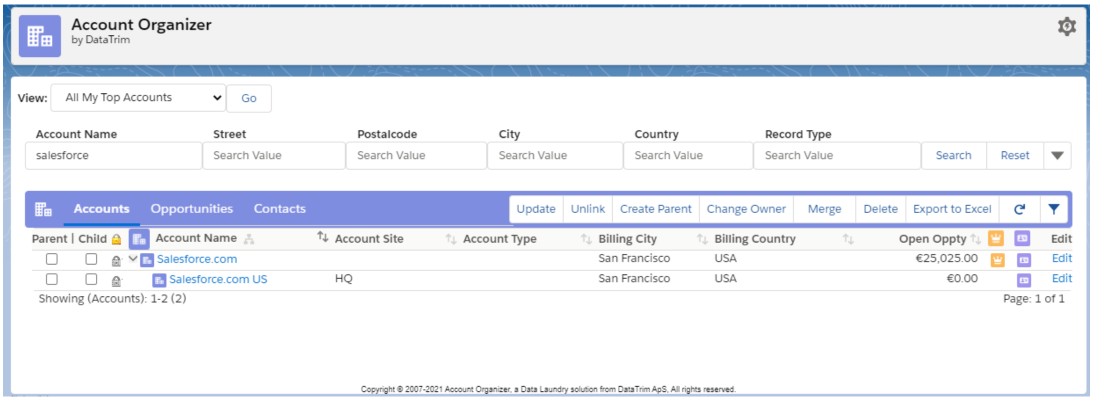


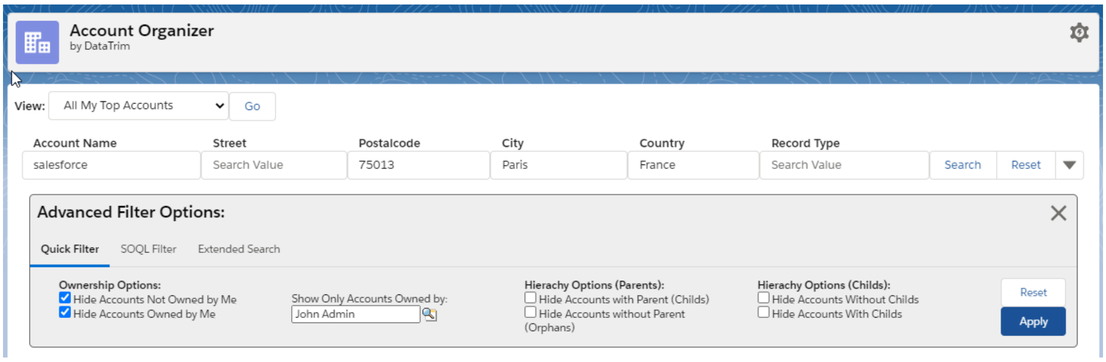
Image: With filter.

I the advanced settings you can even define exclusion filters, which will permanently exclude accounts from your search result. Use this feature to exclude accounts of a certain record type, accounts from other business units etc.

3.2.1 **Advanced Filters**

3.2.1.1 Quick Filter

You can use the Quick Filter, to quickly filter the search result.
The filter options allow you to quickly identify the records by ownership, or where they are located in the organization.

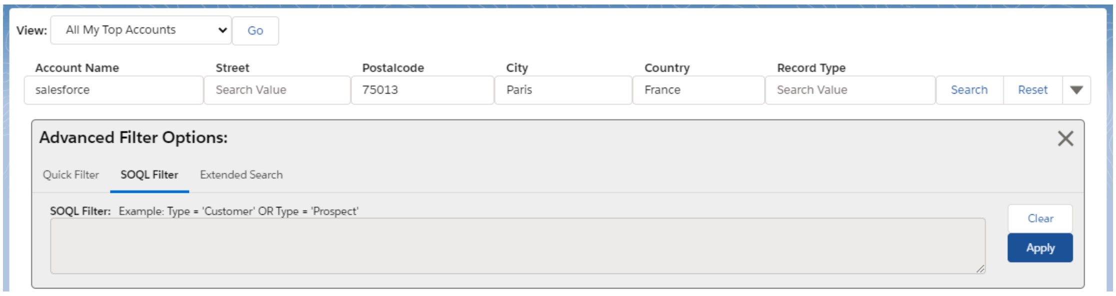


Using the Quick Filters in combination with the Lock action (explained below) is extremely powerful in building hierarchies, as it allows you to Lock certain accounts to the view and let only the accounts complying to the filters be listed underneath.

3.2.1.2 SOQL Filter

A SOQL filter is available for very advanced user.

The full salesforce SOQL language is supported, please see this for reference.



3.2.1.3 Extended Search

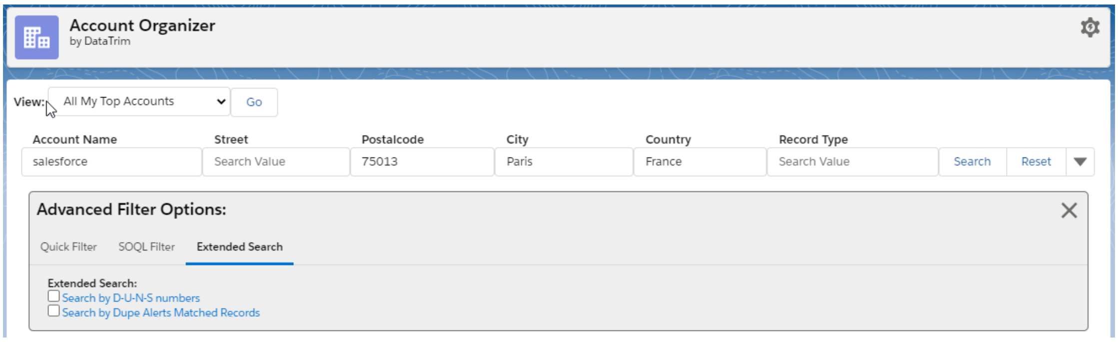
The Account Organizer also supports the use of other dataset which may help identify records which are linked together.

Many organizations enrich their accounts with **DUNS numbers**, and these numbers can be used to identify Parents and Child Accounts in organizations.

Enable this feature to let the Account Organizer leverage the Duns numbers in the effort to find associated accounts and organizations.

Clients of our DataTrim Dupe Alerts application can also utilize the sophisticated matching and deduplication engine to help identify records which may or may not be related.

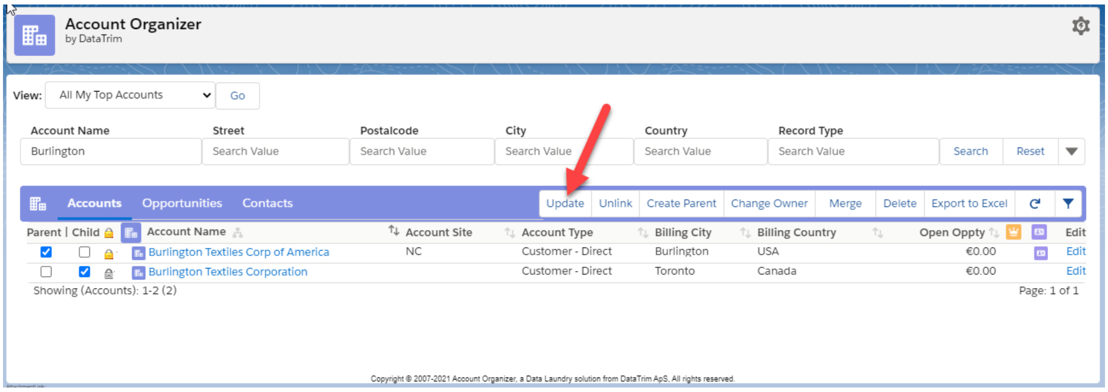
Enabling this search option will let the Account Organizer make use of the data stored in the DataTrim Matched Records object for identification of associated accounts and organizations.



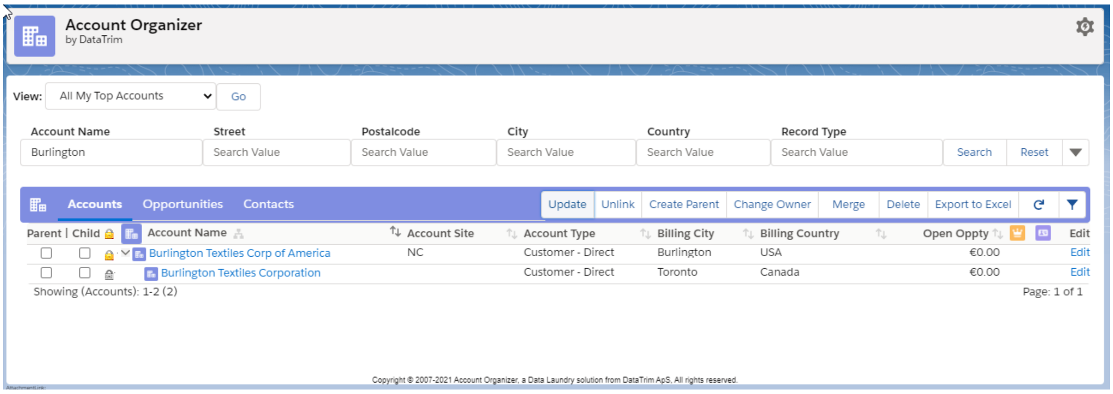
3.3 Managing Accounts

3.3.1 Update Parent – Child Relationship

Once you have a list of accounts, select one (1) Parent and at least one (1) Child to link the records together in a Parent-Child relationship.
Use the Update button to update the relationship.



And your accounts are linked together in a hierarchy.



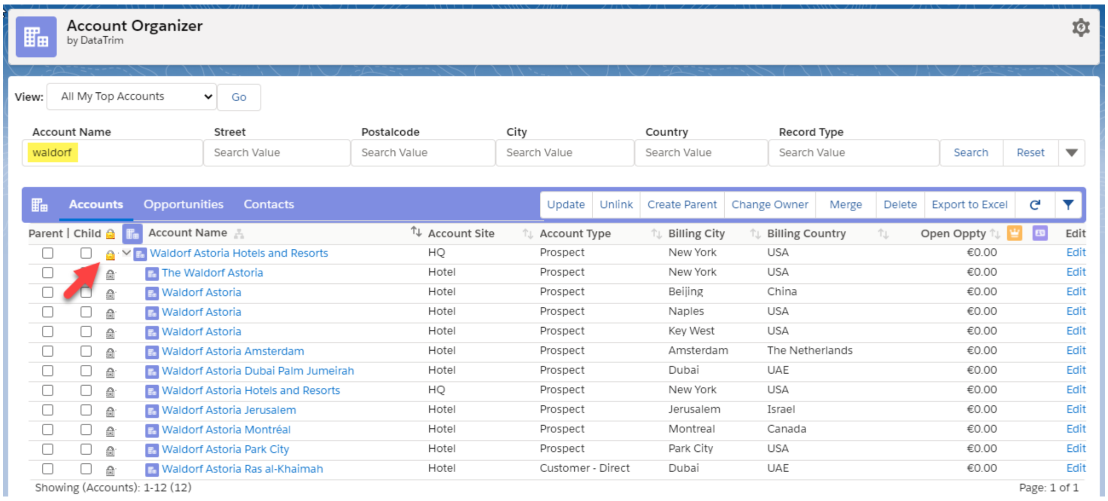
3.3.1 Unlinking a Child from its Parent

Use the Unlink button for one or more children to unlink the account(s) from their respective parents. Select at least one (1) Child.

3.3.2 **Lock/Un-Lock Accounts**

You can Lock selected account from one search to safeguard them in the list while you make a new search.

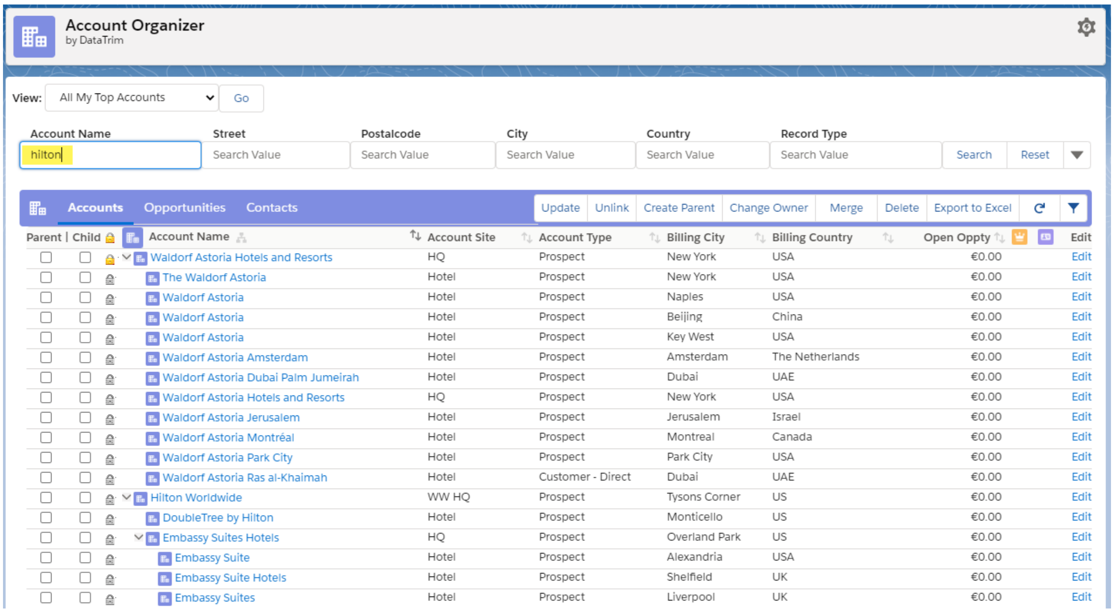
This is convenient when you want to link companies together which doesn't necessarily share the same account name e.g., different brands in a large enterprise.
You can lock the account in the list by clicking the "lock icon" to the left of the account name.
Example: We are organizing Hotels, and start with: "Waldorf"...



While we know that the Hiltons are in the same organization, we know that if we make a new search for Hilto, we will loose the Waldorf account and thus we cannot link them together. So to keep the Waldors account in the list while searching for Hilton we LOCK it.

Locked accounts are highlighted with a yellow Lock icon next to the name.

Next, the new search can be made, in the example we search for Hilton, and we now get both the Wandorf Account and the Hilton accounts, and can link them together.



3.3.1 Create Parent

To bring it all together you might even have to create the Parent and bring the 2 childs in under a new Parent Account.

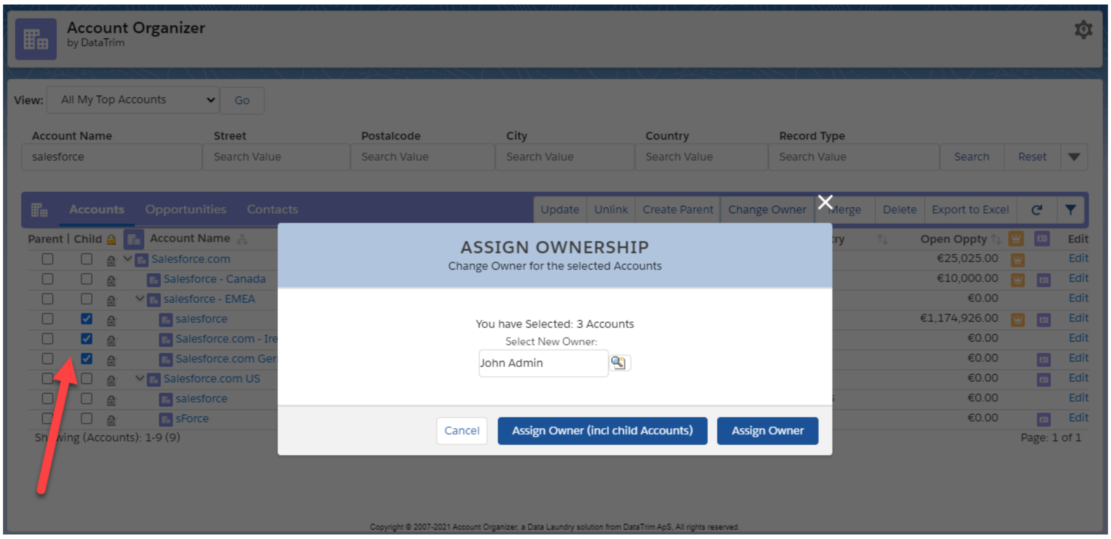
To create a parent account – on the fly – select an account in the list using the Checkbox in the Parent column, and use the Create Parent button. This function will create a copy of the selected account, and link the selected account to the newly created account (the Parent).

3.3.2 Changing Account Owner

Note: This feature is not available in the FREE edition.

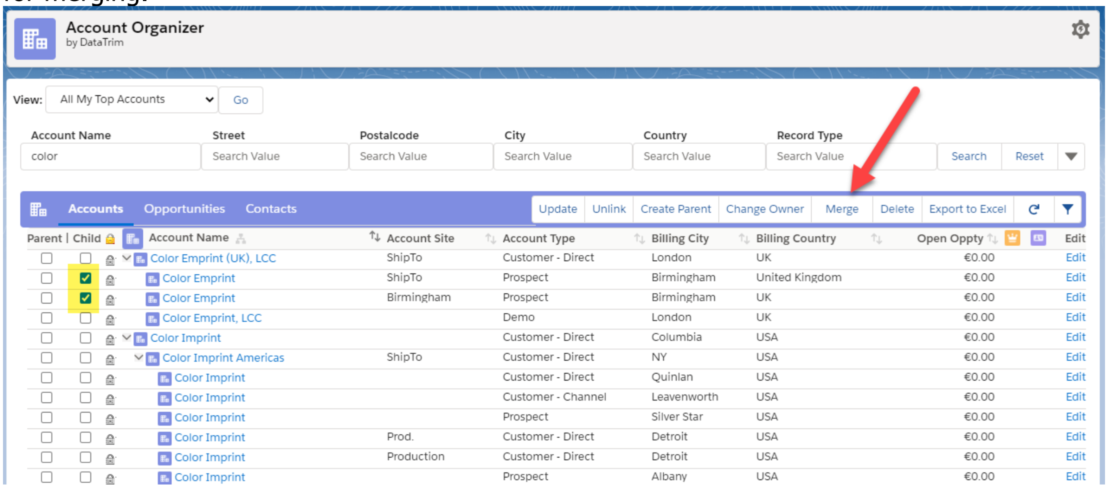
To change the owner of accounts, select the account(s), use the **Change Owner** button, and an input field appears where you can give the name of the new account owner.

When you click on **Assign Owner** the account ownership is changed for the selected accounts.
If you click **Assign Owner (incl child Accounts)**, the account ownership is changed for the selected accounts AND all of their children, grand-children etc.



3.3.3 Merging duplicate accounts

To merge accounts using the DataTrim merge wizard[2], select minimum 2 and only 2 accounts for merging.



The Merge Wizard, supports multiple features to make sure you get the most accurate outcome. This includes the ability to focus on the fields where the 2 records have Different values, to select the values of choice, to edit the records directly in the Merge Wizard, and to carefully process Portal Customer Accounts.

Selecting the values, you want to keep:

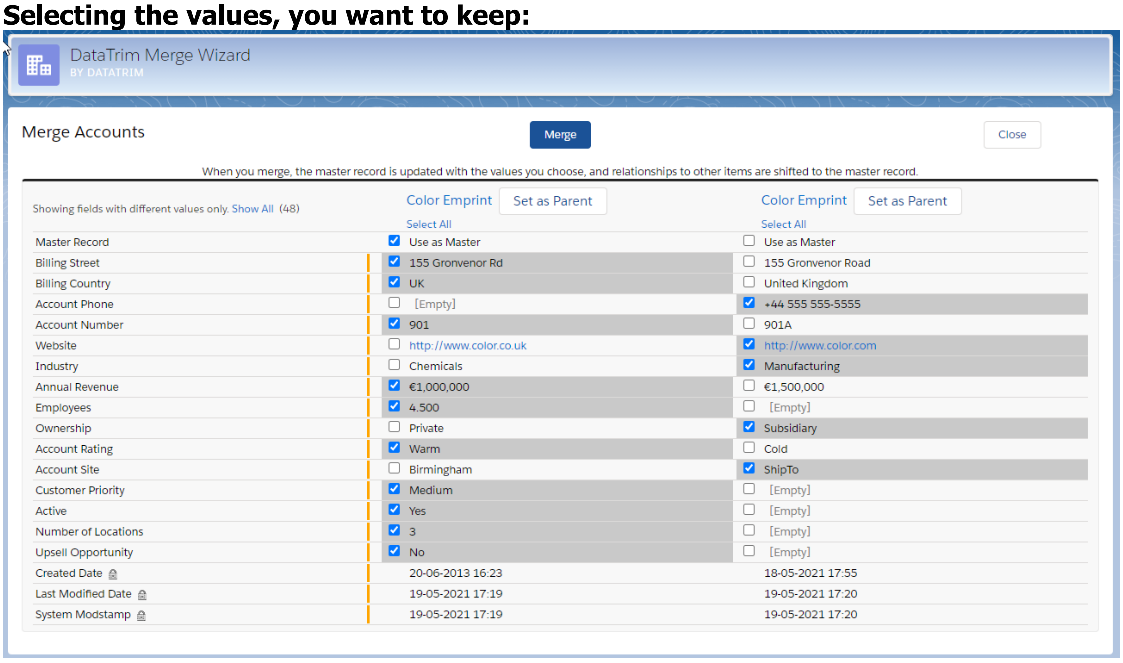


Image: DataTrim Merge Wizard

---

[2] Replaces the salesforce merge wizard for both classic and Lightning. The salesforce merge wizard is no longer supported.

Editing on the fly:

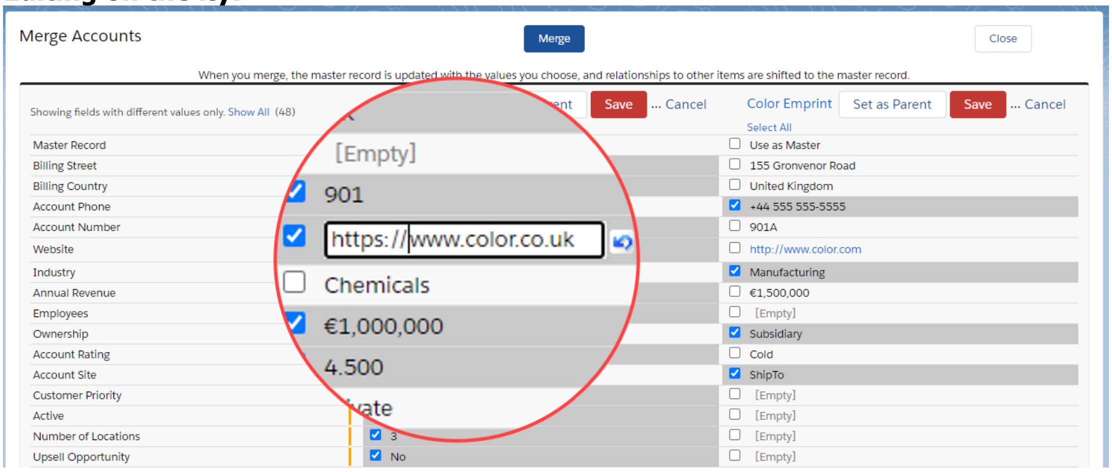


Image: Modify data directly in the Merge Wizard

Dealing with Customer Portal Accounts:

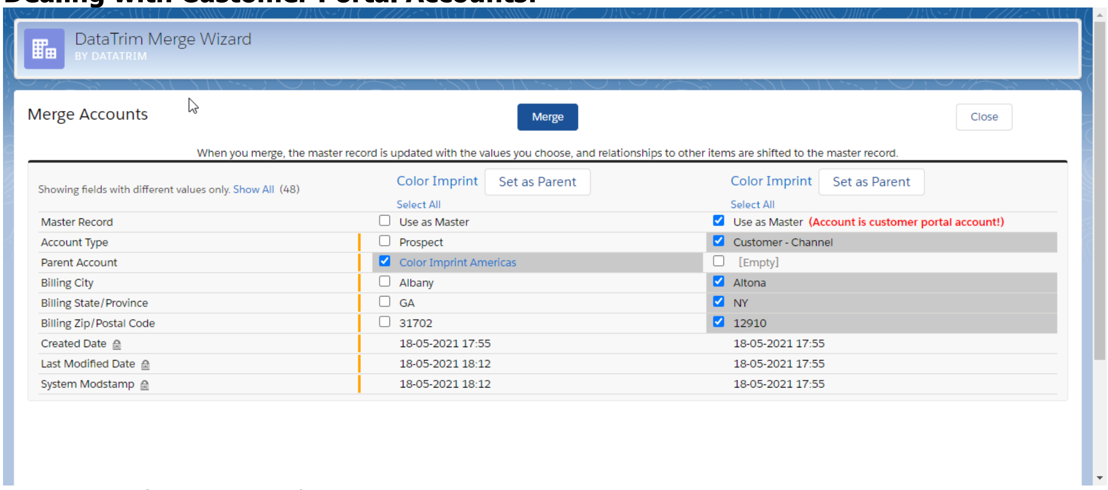


Image: Warning for Customer Portal Accounts

Once merged, you can close the Merge Wizard window, and refresh the Account List in the Account Organizer to get a fresh view of your account Hierarchies.

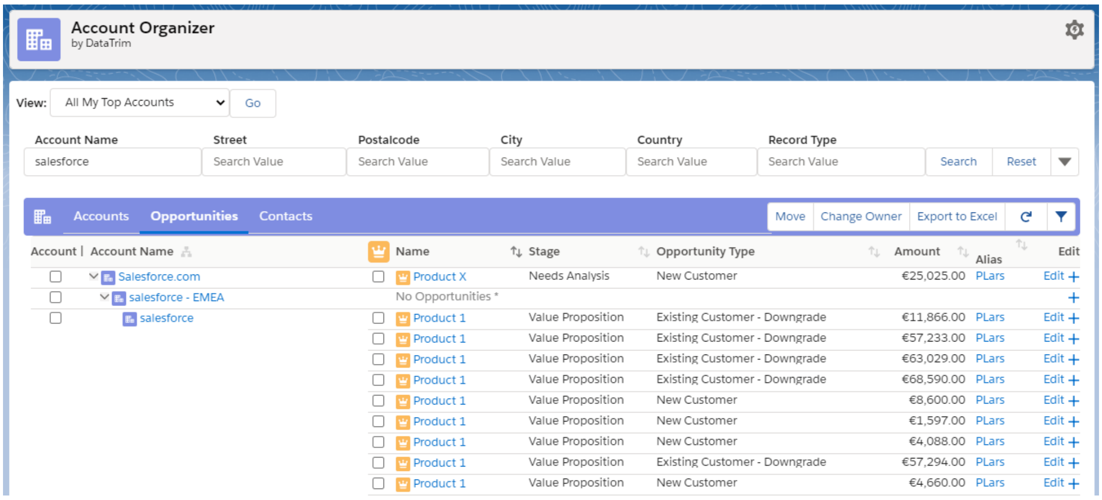
3.3.4 **Delete Accounts**

Redundant Accounts can be deleted using the Delete button.
Note: that by deleting accounts, you also delete all related data, incl Contacts, opportunities etc. So, unless it you are 100% sure that you want to remove the account, it might be better to introduce a status on your accounts so that you can "hide" or "archive" them.

See the setup section for information about how you can hide this button for users, to prevent accidental deletion.

3.4 Managing Opportunities

In the Opportunity View, you will see the current Account hierarchy and for each account there will be a list of opportunities.
You can move opportunities to another account, reassign the ownership, edit and add opportunities directly from this view.
And as described above for accounts you can apply a filter to only display selected opportunities.
By default, only open opportunities are being displayed.



3.4.1 Moving Opportunities

Select one or more opportunities and one (and only one) account to which you want to move the opportunities.

3.4.2 Changing Opportunity Owner

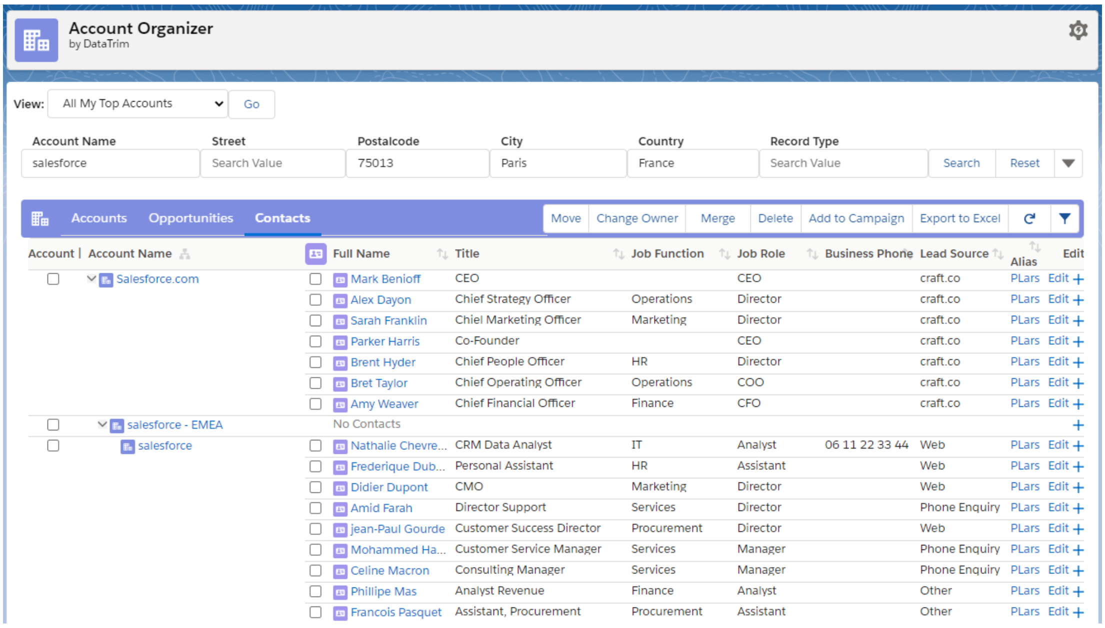
Note: This feature is not available in the FREE edition.

To change the owner of accounts, select one or more opportunities, use the **Change Owner** button, and an input field appears where you can give the name of the new owner.

When you click on **Assign Owner** the opportunity ownership is changed for the selected opportunities.

3.5 Managing Contacts

In the Contact View, you will see the current Account hierarchy and for each account there will be a list of contacts.
You can move contacts to another account, reassign the ownership, edit and add contacts directly from this view.
And as described above for accounts you can apply a filter to only display selected contacts.



3.5.1 Moving Contacts

Select one or more contacts and one (and only one) account to which you want to move the contacts.

3.5.2 Changing Contact Owner

Note: This feature is not available in the FREE edition.

To change the owner of contacts, select one or more contacts, use the **Change Owner** button, and an input field appears where you can give the name of the new owner.

When you click on **Assign Owner** the contacts ownership is changed for the selected contacts.

3.5.3 Merging Duplicate Contacts

To merge contacts using the DataTrim merge wizard, select minimum 2 and only 2 contacts for merging.
The merge wizard for contacts is the same as the merge wizard for contacts.
See 3.3.3 Merging duplicate accounts for more details.

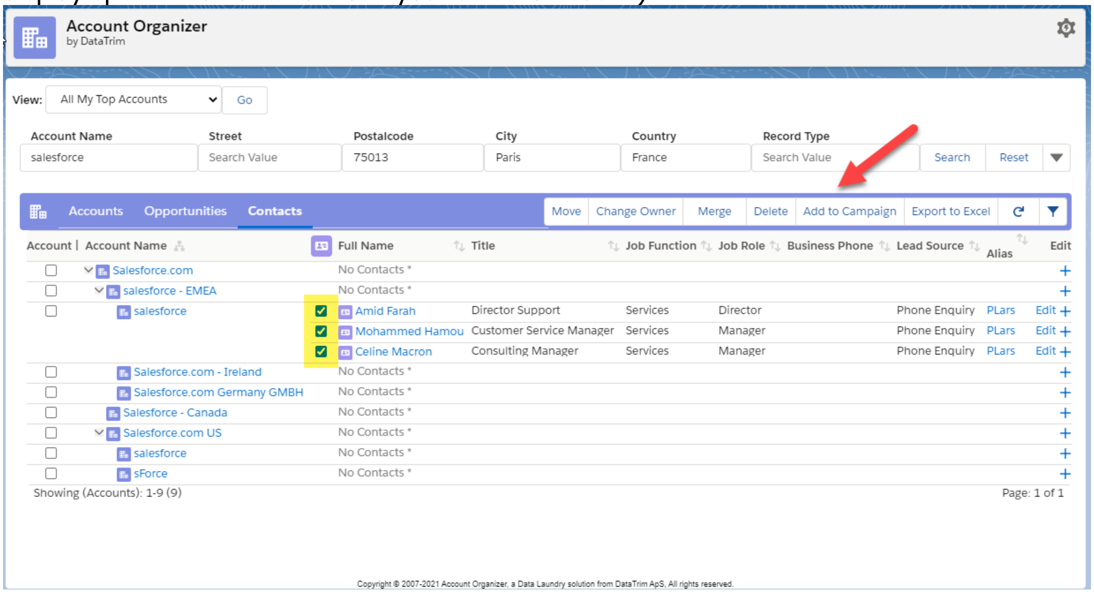
3.5.4 Delete Contacts

Redundant Contacts can be deleted using the Delete button.
Note: By deleting contacts, you also delete all related data, incl notes, attachments etc. So, unless it you are 100% sure that you want to remove the contact, it might be better to introduce a status on your contacts so that you can "hide" or "archive" them.

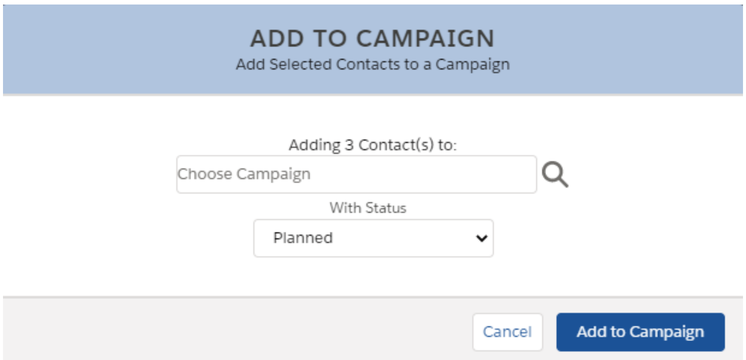
See the setup section for information about how you can hide this button for users, to prevent accidental deletion

3.5.5 **Add to Campaign**

While working your contacts you may want to add some of them to a specific campaign. Simple select the target contacts, and click the Add to Campaign button (you can use filters to display specific contacts to make your selection easier).



Select your campaign and the Status for the Campaign Members and add them to the campaign.



If the contacts already are included in the campaign, the contacts will not be added a second time.

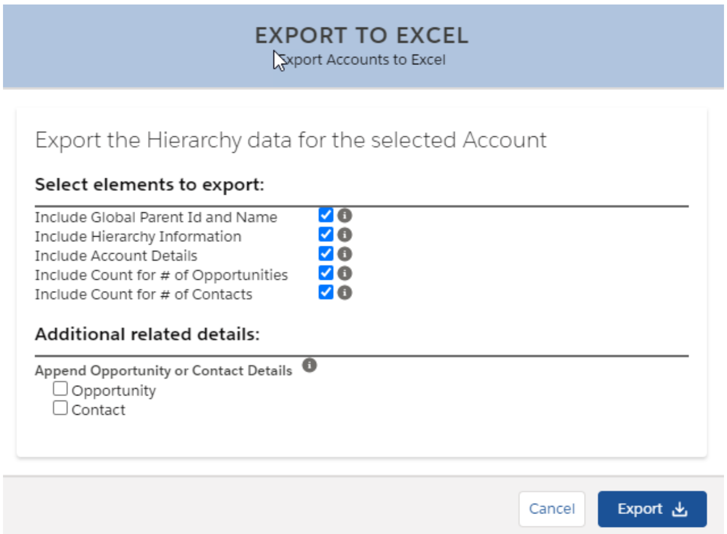
3.6 Exporting Data

Exporting data is available from the Account, Opportunity and Contact List View.

You can export data for a selected number of Accounts, or for all the Accounts in the list view. For each row in the export, you can include basic data which relates to the Account:

- ID and Name of Global Parent
- Hierarchy information:
  - Index: Position in the hierarchy 1,2,3 etc. for sorting purposes.
  - Level: The depth in the hierarchy – distance from the Global Parent
  - Has Children: true/false to indicate if the Account is a parent or not.
- Account Details: Account Id and Name, plus field values from the current Field Set.
- #Opportunites: Number of opportunities (Opportunity filter applied)
- #Contacts: Number of contacts (Contact filter applied)

In addition to this information, you can export either Opportunity Details or Contact Details. Opportunity and Contact details include the Id, and name plus field values from the current Field Set

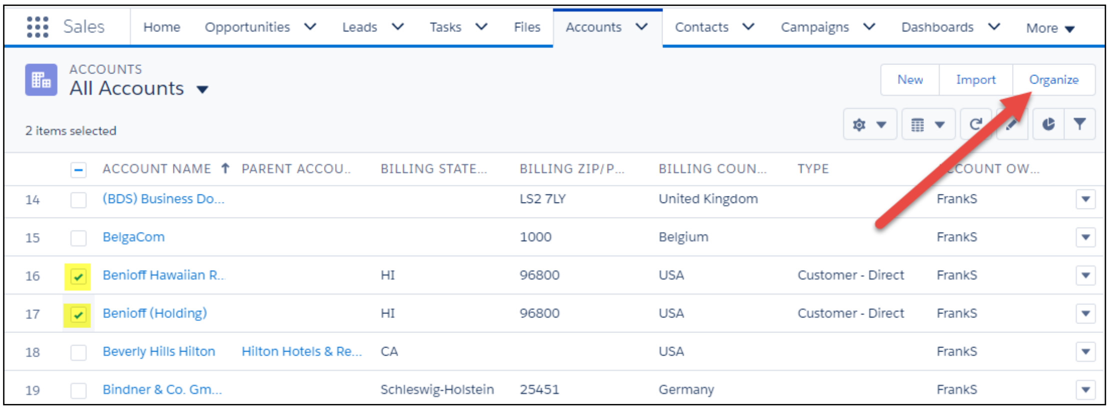


Click **Export** to download a comma-separated .csv file.

4 Account Organizer Shortcuts

4.1 The Account Organizer List Button

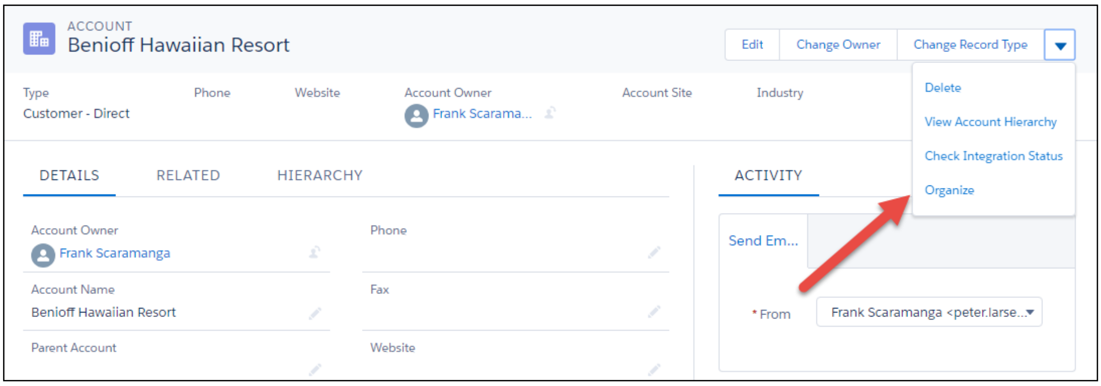
You can use the search and filter features of the application to find the accounts for which you want to work. By means of the List Button: **Organize** you can also launch the Account Organizer directly from a salesforce search result.



4.2 The Account Organizer Detail Button

Like the List Button above, you can also use the **Organize** button on the detail screen.

Using the account as your starting point for the Account Organizer will automatically pre-populate the search fields with the relevant data from the current account. And it will directly show you the accounts which potentially are related to the current account.

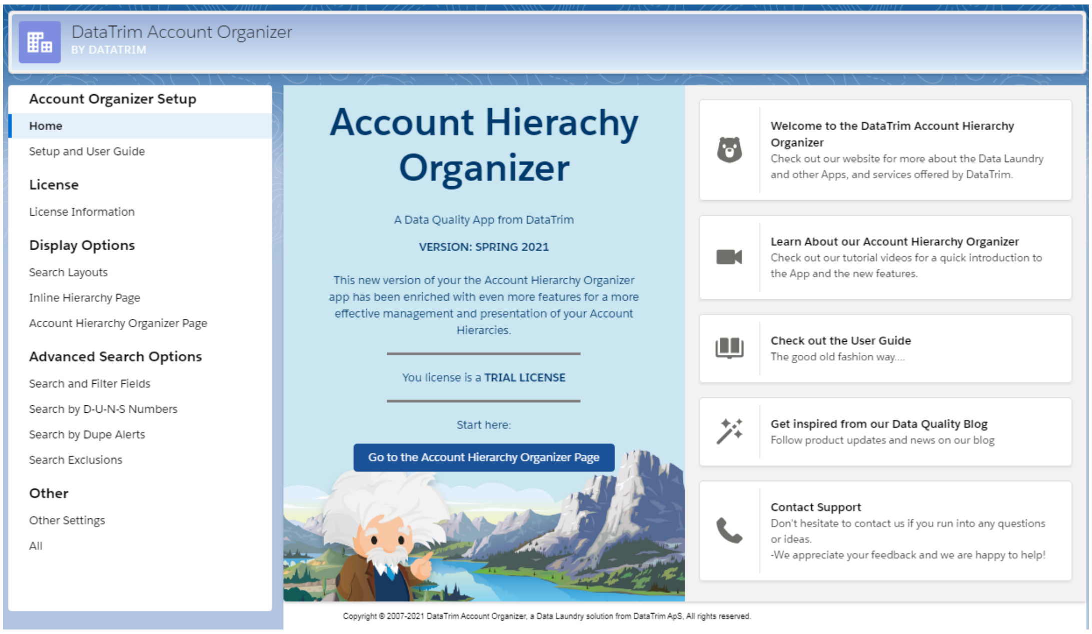


5 Account Organizer Settings

The settings for DataTrim Account Organizer are available using the setup link in the top right corner of the Account Organizer page.

The Setup Page contains menu on the left, from where you can access the different sections. It also provides you access to the most recent Setup and User Guide.

The Home section, informs you about the current version, and provides you access to videos, articles and support.



Version information and upgrades:

Upgrades are FREE.

Note that most new releases are automatically "pushed" to your org. For these upgrades you don’t need to take any actions.

For major releases, we will inform you by email about the new features, and you can decide whether you want to upgrade or not. The release emails will contain links and information about how to upgrade.

If you choose to skip such an upgrade, the automatic "push" upgrade will be disabled.

5.1 License Information – Enter License Number

DataTrim Account Organizer is a Managed Package developed, provided and supported by DataTrim ApS.
The application exists in 4 versions, Trial, FREE, Standard, and Unlimited.
When you install the application, it will by default be a Trail license.

Trial license

The Trial License is an evaluation license which allows you to evaluate the Application and its functionality. Certain features may be limited for evaluation purposes.
As part of the welcome package sent to you by email, you will receive a License number.
Once you enter this license number you will activate the FREE license.

FREE license

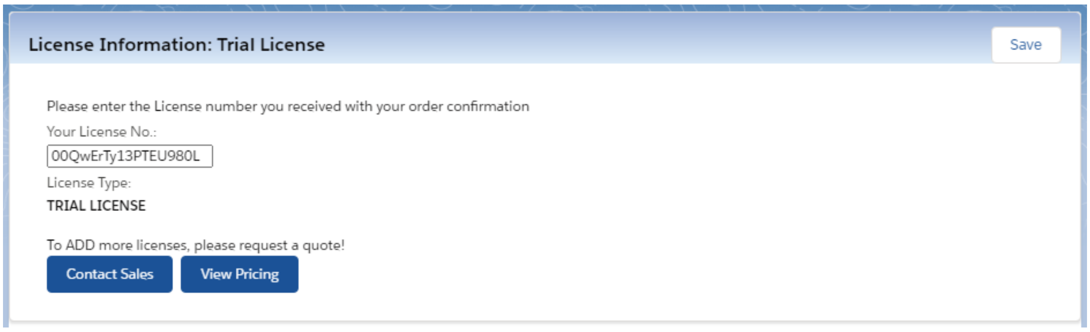
The **FREE** license is 1 license package.
When installing the package, you will by default get this FREE license. Additional licenses can be purchased as Standard Licenses

STANDARD license

Standard licenses are available on a per user basis. Please check out our website for pricing information: https://www.datatrim.com/account-organizer/#pricing

Unlimited license

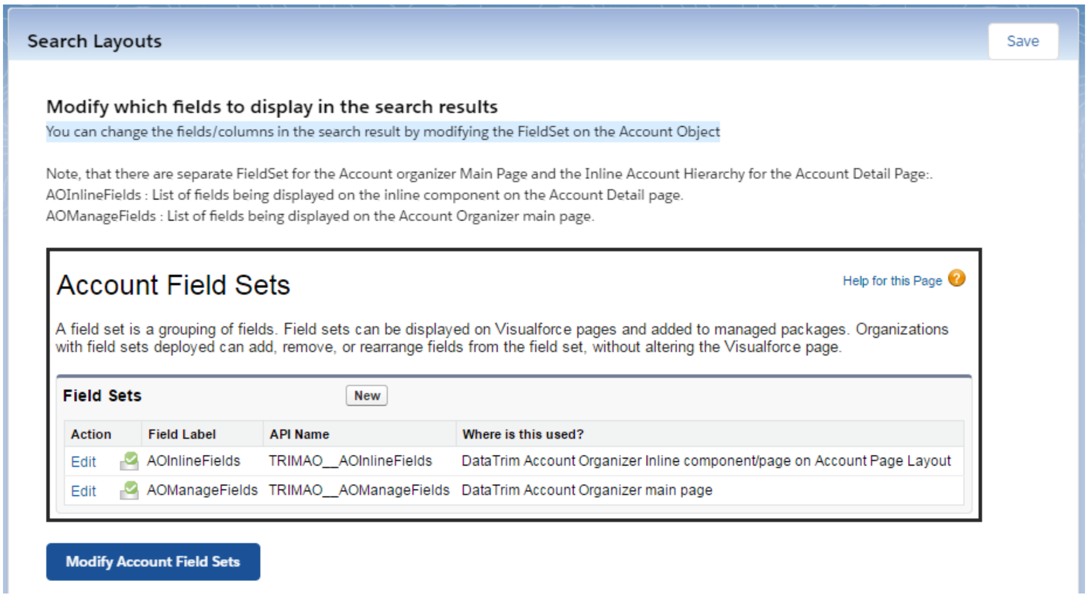
The Unlimited license is an organization wide license not limited by the number of users.



5.2 Display Options – Search Layout

You can change the fields/columns in the search result by modifying the FieldSet on the Account Object.

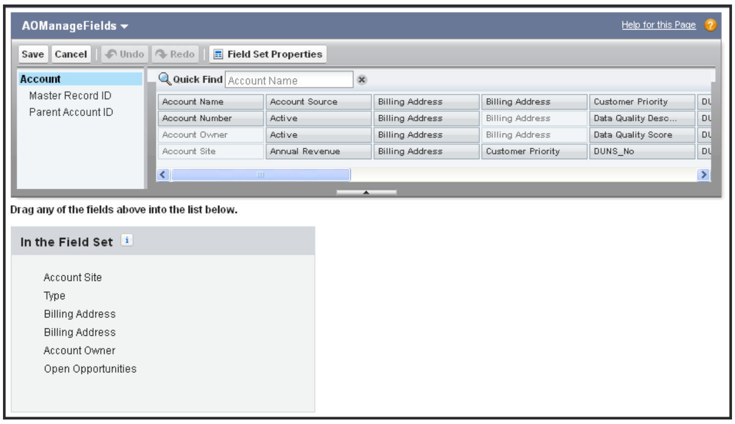
There is one FieldSet for the Inline Hierarchy and another for the Account Organizer Main Page.
Click the blue button to be taken to the Field Set page for Accounts.



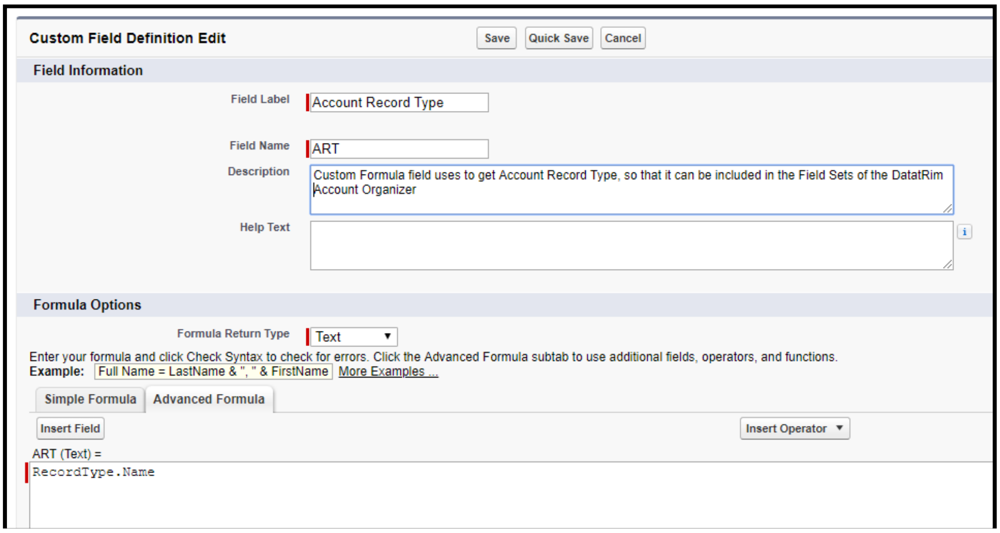
Note: In a similar way you can modify the fields/columns for Opportunities and Contacts (see below)

Once you edit one of the Field Sets you can drag/drop the fields to display, and arrange their order.

Note that the Account is added by default (mandatory) and will always be the first field/column in the search layout, so there is no need for you to add it manually.



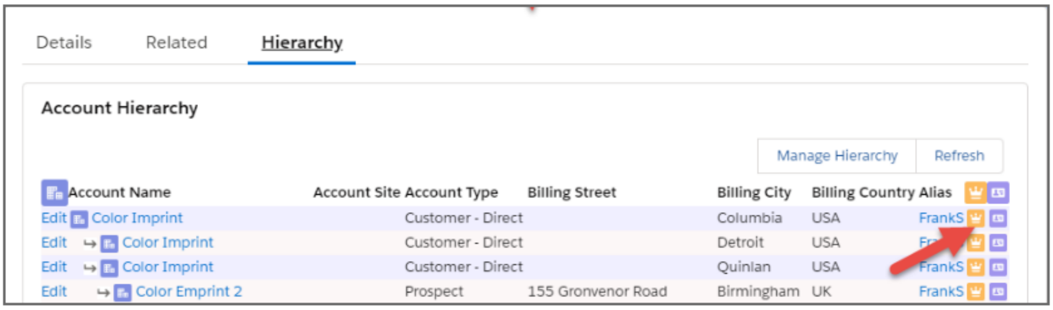
Note: The Account Record Type, may not be in your list of available fields. If you still want to add this to the Field Set, you must create a formula field, and then add this formula field to the Field Set.

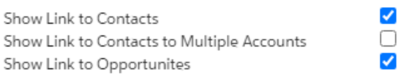


5.2.1 Display links to Contacts and Opportunities in the Search Result

As an extra feature you can dynamically add columns indicating the availability of Opportunities/Contact for the individual Accounts.

Display links to Contacts and Opportunities in the Search Result



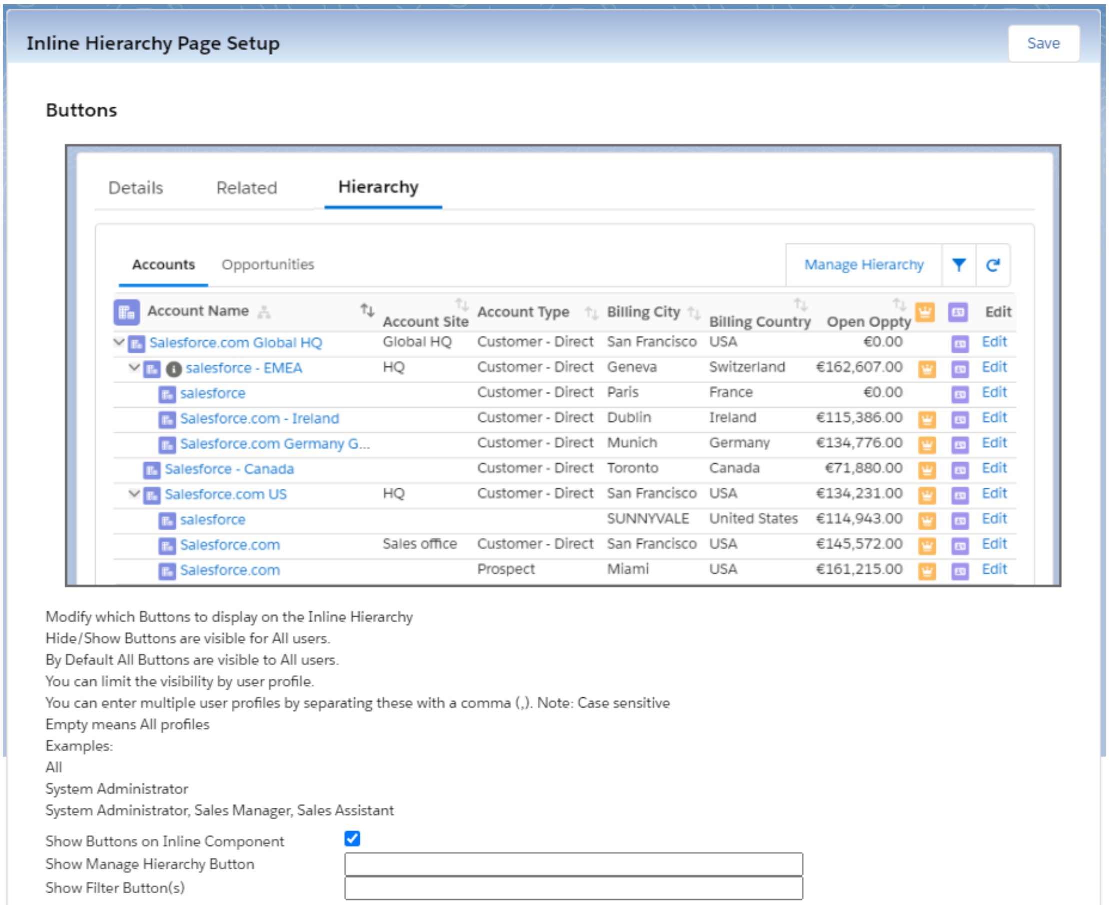


The Icons will show if there is at least one Opportunity/Contact.
By hoovering your mouse over the icon you can see the actual number of opportunities/contacts.

Note, that if you are using "Contact to Multiple Accounts", there are a special option for this.

5.3 Display Options – Inline Hierarchy

The Buttons and Tabs on the Inline Hierarchy can be displayed/hidden using the settings below.



You can enable/disable the Opportunity and/or Contact Tab:

If you have very large hierarchies, you might want to apply some filters in order to speed up the load time.

You have 3 options:

1) Select one of the 3 predefined filters in the setup page to Hide Accounts in the Hierarchy
   Hide Non-direct Parents: this will hide parent records which are not in direct line with the current account, i.e. you will only see the relations from the current account and directly to the ultimate parent.
   Hide Sisters: this will hide accounts which are at same level in the hierarchy, i.e. accounts which have the same parent as the current account.
   Hide Grand Children: this will hide accounts which are more than 2 levels down in the hierarchy.
2) Use the ***Advanced Search Options - Search Exclusions*** to e.g. exclude account with certain Record types from the search results etc.
3) Use the ***Custom Settings*** to select one of the predefined Inline Default Filter for Account/Opportunity/Contact

5.4 Display Options – Account Organizer Main Page

5.4.1 User Interface Compatibility

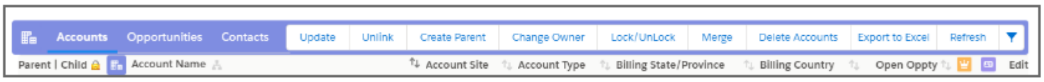
In Spring 2021 we have made some significant changed to the user interface of the Account Organizer main page. By default, you will be upgraded to use the latest interface, but if you prefer you can revert to the previous user interface.

5.4.2 Buttons – Account

You can limit the access to the Account Buttons by User profiles.
By Default, the buttons are available to all.
For each button enter the name of the Profile who should have access. All other will then no longer have access to the button,
You can add multiple profiles by separating them by comma.

Buttons - Organizer Page

Modify which Buttons to display in the search results By Default All Buttons are visible to All users.



You can limit the visibility by user profile.
You can enter multiple user profiles by separating these with a comma (,). Note: Case sensitive
Empty means All profiles
Examples:
All
System Administrator
System Administrator, Sales Manager, Sales Assistant

Account Tab

Show Link Button
Show Unlink Button
Show Change Owner Button
Show Merge Button
Show Delete Button
Show Excel Button

Note: The Change Owner button, Merge button and Export to Excel button can only be manipulated using the Standard License.

5.4.1 Opportunity tab and its buttons

In addition to showing accounts in their hierarchy, you can add an Opportunity Tab, which will display the Opportunities for each Account in the hierarchy.

You can limit the access to the Opportunity Buttons by User profiles.
By Default, the buttons are available to all.
For each button enter the name of the Profile who should have access. All other will then no longer have access to the button,
You can add multiple profiles by separating them by comma.

Opportunity Tab

Show Opportunity Tab

Opportunity Buttons

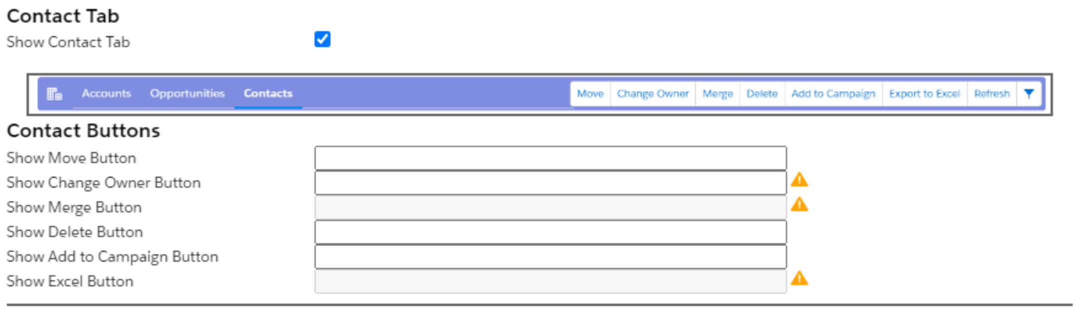
Show Move Button
Show Change Owner Button
Show Excel Button

Note: The Change Owner button and Export to Excel button can only be manipulated using the Standard License.

5.4.1 Contact tab and its buttons

In addition to showing accounts in their hierarchy, you can add a Contact Tab, which will display the Contacts for each Account in the hierarchy.

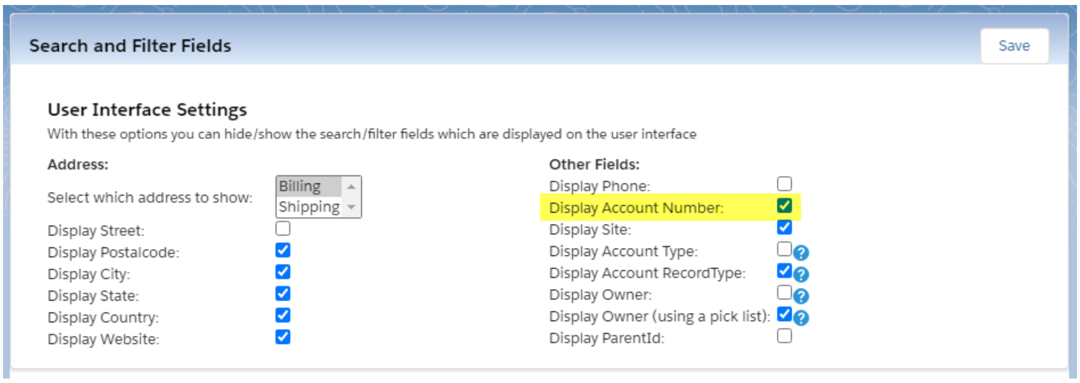
You can limit the access to the Contact Buttons by User profiles.
By Default, the buttons are available to all.
For each button enter the name of the Profile who should have access. All other will then no longer have access to the button,
You can add multiple profiles by separating them by comma.



Note: The Change Owner button and Export to Excel button can only be manipulated using the Standard License.

5.5 Advanced Search Options - Search and Filter fields

The user interface can be modified to meet your specific needs with regards to e.g. which address (billing or shipping) to use and display.
You can also hide/show the other basic fields on the search and filter section.
NEW Spring 2021: Account Number is now available as search field.



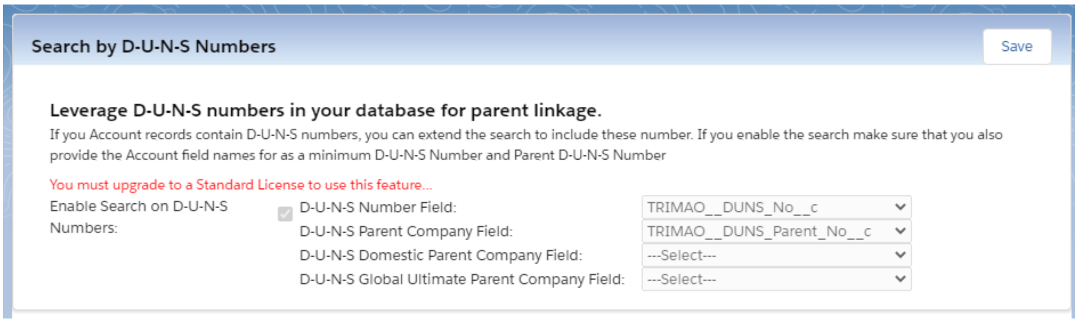
5.6 Search by DUNS Numbers

OBS: Only available with the Standard or Unlimited License.
In order to activate and benefit from the additional duns search feature, you must have fields on your account object for storing the Duns numbers.

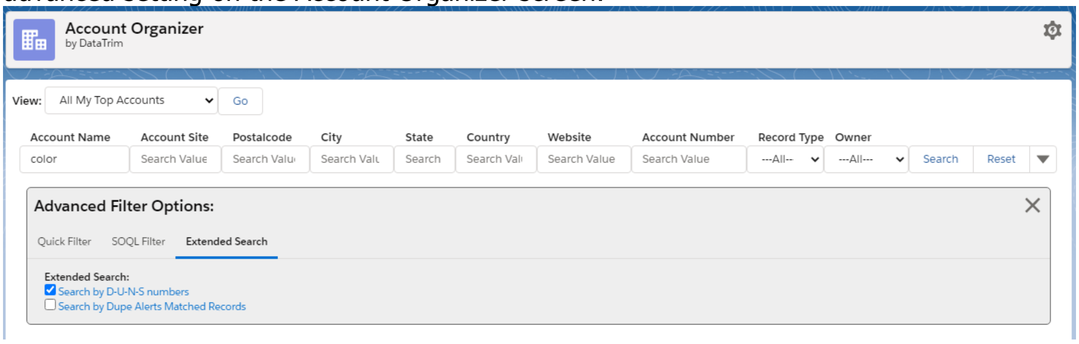
DUNS numbers exist at 4 levels:

1) Individual account: DUNS Number
2) Parent DUNS Number: DUNS number of the parent account
3) Domestic Parent: DUNS number of the top-level account with the country
4) Global Ultimate Parent: DUNS number of the top-level account world-wide.

Data for these fields can collected in many ways and from many sources including data.com from salesforce.



Use the checkboxes to the far right to also display the DUNS numbers in the search result. Once enabled in the setup the individual user can enable/disable the feature from the advanced setting on the Account Organizer screen:

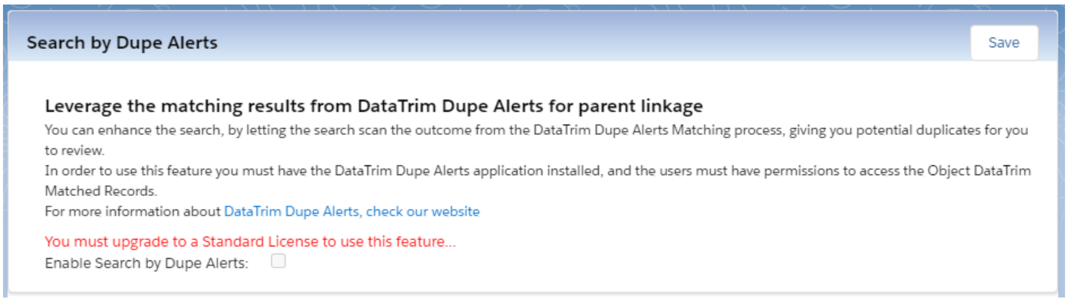


5.7 Search by Match Results from Dupe Alerts

OBS: Only available with the Standard or Unlimited License.

Like for the DUNS numbers above, the search process can take advantage of relationships identified by the DataTrim Dupe Alerts application.

The DataTrim Dupe Alerts application is a separate deduplication solution which performs deduplications and thus identifies account records which may or may not be related, and where a possible parent-child relationship may exist.



For more information on DataTrim Dupe Alerts, check out our website: www.datatrim.com

5.8 Search Exclusions

OBS: Only available with the Standard or Unlimited License.

5.8.1 Exclude selected Accounts from search

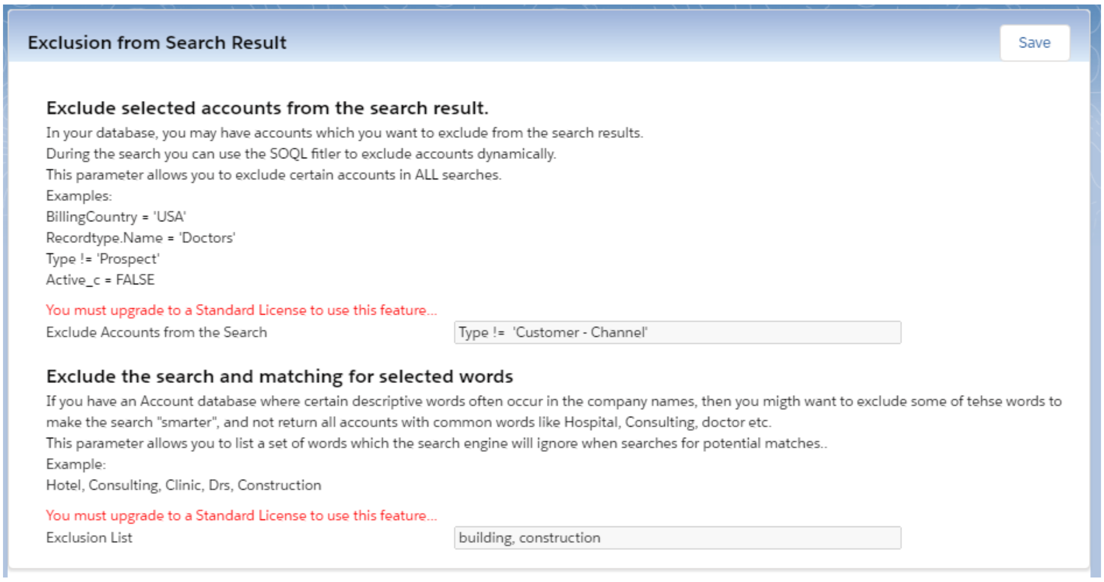
In your database, you may have accounts which you do not want to be included in the search, e.g. account records you keep only for maintaining a reference to a back-office system etc.

And although you can use the SOQL filter to exclude these records in your search, you might want to setup a filter which ALWAYS excludes these accounts from ANY search.

To permanently exclude these accounts from any search, add the exclusion filter to the Custom Settings.

Examples:
BillingCountry = 'USA'
RecordType.Name = 'Doctors'
Type='Prospect'
Active__c = FALSE
CreatedDate >= 2011-01-31T23:00:00.000Z

The Filter is applied to the *WHERE CLAUSE* with the logic operator *AND* like this:
SELECT … WHERE (search filter) AND (RecordsType.Name= 'Doctors')



5.8.2 Exclusion list

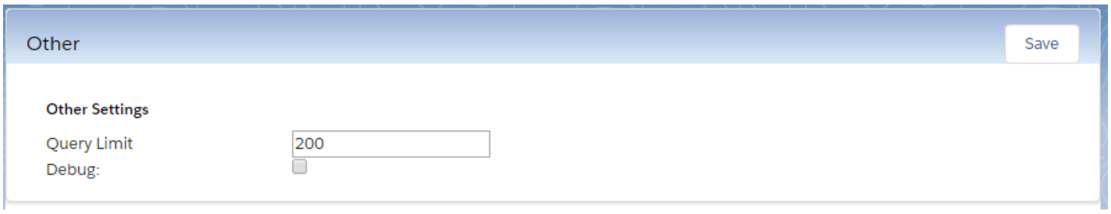
In certain databases, we see that companies in certain segments often use the same words in the naming.
So, if you sell products in the healthcare industry many of your accounts may be called something with Hospital, Clinic or Doctor etc.
When you do a search, you don't necessarily always want all the hospitals to show in the list.

To avoid this and make the search engine "smarter" you can create a list of words which the search engine will ignore when it performs its intelligent search throughout your database.

5.9 Other Settings

Query Limit
Salesforce enforces something called governor rules, which are limitations implied to any code running on their platform.
As our solution is performing multiple queries onto the database these rules may limit the number of accounts being returned and the processing of these.

The Query Limit parameter is a way to avoid hitting these rules. By default, this is set to 25, you might want to increase/decrease this value to optimize the behavior for your specific data set.

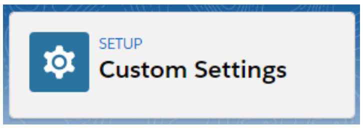


Debug
If you run into any errors and you contact us for help (support@datatrim.com) you might want to enable Debug and reproduce the error, so that we can get a bit more information to go with when trying to resolve the issue.

When contacting us, a screenshot with the debug information will be very useful, thank you!

5.10 Advanced Settings

Although the basic settings as described above can be changed from the setup page, the more advanced settings are controlled from the Custom Settings Definition of Salesforce.

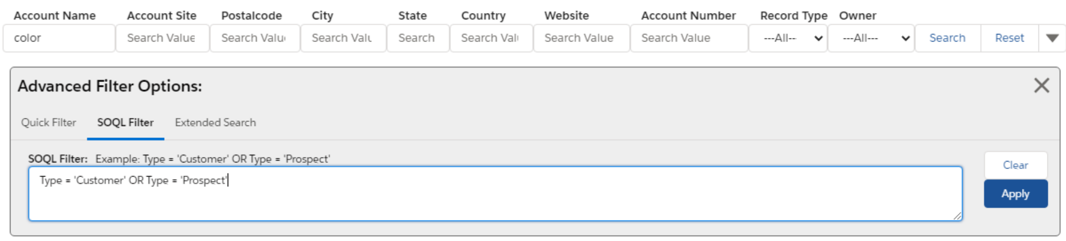


Use the **Manage** Button to modify the settings, and Edit the settings with the name: **Settings**

5.10.1 Enable SOQL Filtering

Although the filter fields on the main screen allow you to filter by the displayed fields you might want to go even further', and filter on fields which are not in the top rows.

When enabling the SOQL filter you will get a free-text field in which you can insert your own WHERE statement following the SOQL language of salesforce.



If you are not familiar with the SOQL language of salesforce this is not recommended, but google the SOQL language and you will find the latest syntax to follow.

Examples:
Type = 'Customer'
Type = 'Customer' OR Type = 'Prospect'
RecordType.Name = 'Doctors'
Active__c = FALSE
CreatedDate >= 2011-01-31T23:00:00.000Z

6 Installation

6.1 Package Installation

You can **start the installation of the most recent version** directly from the AppExchange:
https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B3GV6EAN
- Click the **Get it Now** button, to start the installation.

If you are not already logged into the AppExchange you will be asked to log in. Use your salesforce credentials to login and start the installation
If you have a sandbox, you will be asked where to install the package, choose sandbox or production environment.

6.1.1 Package Installation

Follow the setups below to complete the installation. Once done make sure you make the package available to your users and that the different components are properly setup.

Pre-Installation step: Verification of Package Details, and permissions.
If you choose **Install for Admins Only**, you will later have to update the profiles of your users to enable them to have access.
If you choose **Install for All Users (recommended)**, the installation will automatically update all profiles, but you will still have to assign a license to each user before he/she can use the application.
If you already know that only a select set of users should have access, use the **Install for Specific Profiles** to select the profiles for which the users shall have access.

We recommend you to select "Install for All Users", as this will make deployment to a larger group easier, once you get to that point.

Next: **Click Install/Upgrade**.

Wait until the installation is done.
If it takes more than some seconds, you will receive a message saying that you will receive an email once the installation is completed.

In any case wait until the Package installation is competed and proceed with the deployment and License Management.

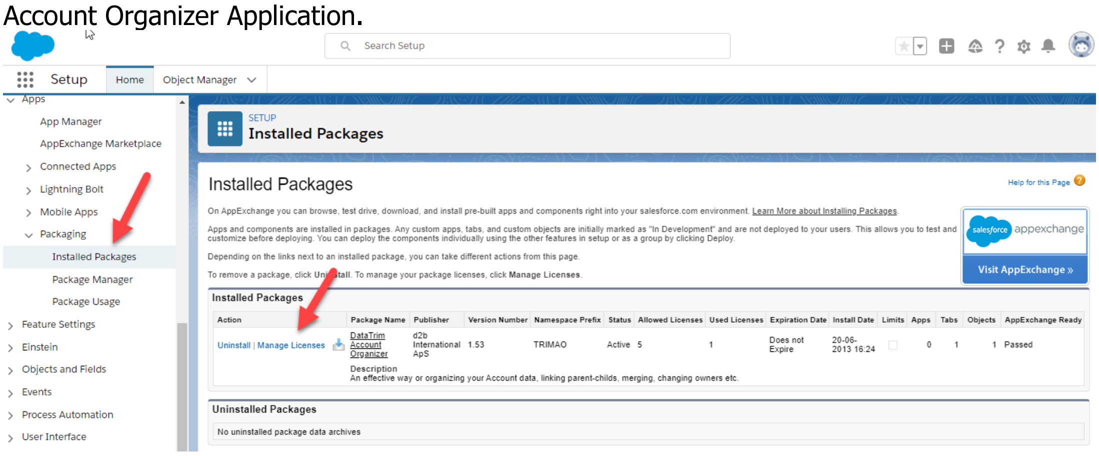
6.2 License Deployment and Management

Once the package is installed, it will be a single license FREE license, and you will as installer automatically be assigned the available license.

If you have ordered more licenses you must wait for our order confirmation, and afterwards you will need to assign the purchased number of licenses to named users in order for the individual users to be able to use the solution.

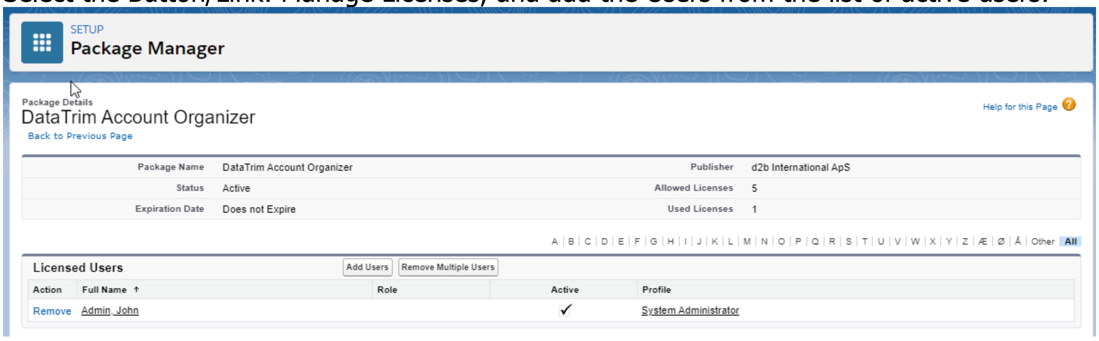
Secondly you will need to make sure that the users profiles are updated so that they have access to the various components of our solution. If you have chosen the Option: ***Grant Access to All** Users* during the installation, this is already done, if not you will need to update the profiles manually as described below.

Start by managing your licenses, go to the setup, view Installed Packages and find the Account Organizer Application.



6.2.1 Managing Licenses

Select the Button/Link: Manage Licenses, and add the Users from the list of active users:



Note: If you haven't already done so during the installation, you may have to update the profile of the selected users to make sure that their permission settings are correctly updated (see the User Profiles in the Setup section of this document).

d2b International ApS– Kostskolevej 5-7 - 2880 Bagsværd – Denmark
Updated: 19. April 2023

7 Setup

Setting up the application after the installation is very simple.
If you are familiar with the basic system administration of salesforce you will accomplish this very easily.

There are 4 elements which you should consider to add. Normally we recommend going through and applying them all, but you may want to ignore some of them if you don't think they are useful for your users:

1) **The Inline Hierarchy page**: This page enables you present the Account hierarchies on the Account Detail Page. You can choose to add it to the detail page itself, or (in Lightning) you can also create a separate Tab for the account hierarchy. The later facilitates a better view of the hierarchies when the hierarchies are big.

2) **The Account Organizer Tab**: You should make the Account Organizer Tab available to everyone so that your users can go here to manage the hierarchies. Note: the setup of this id different in salesforce Classic and Lightning.

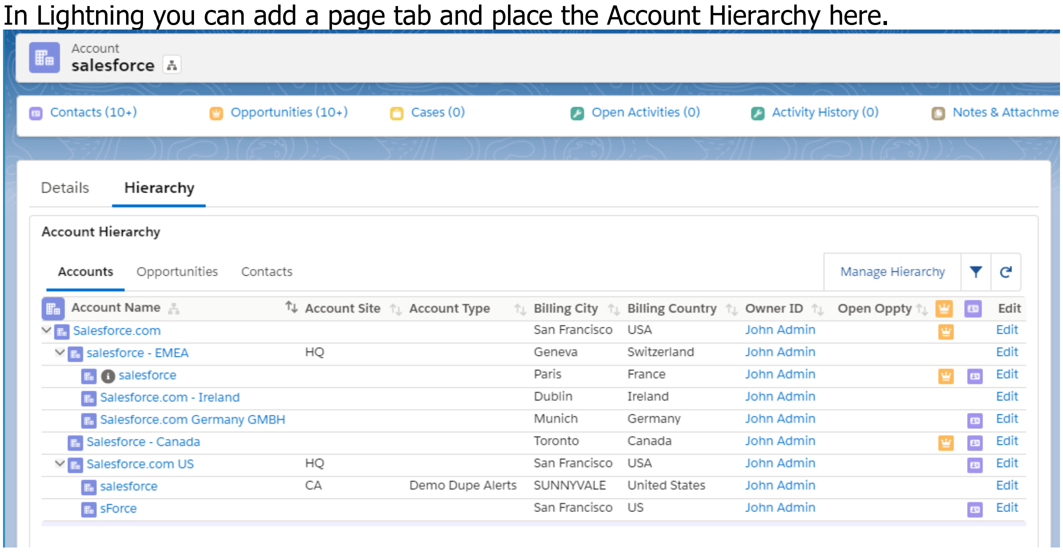
3) **Account Organize List Button**: On the Account Tab, you can add an Organizer button, which allows your users to jump directly to the Account Organizer Tab, with a selection of account records from any of the Views you may have defined for you accounts.

4) **Account Organize Detail Button**: Another Organizer Button can be displayed on the Account Detail Page layout, allowing each user to start the Account Organizer from any account, using the current account as a starting point for the search.

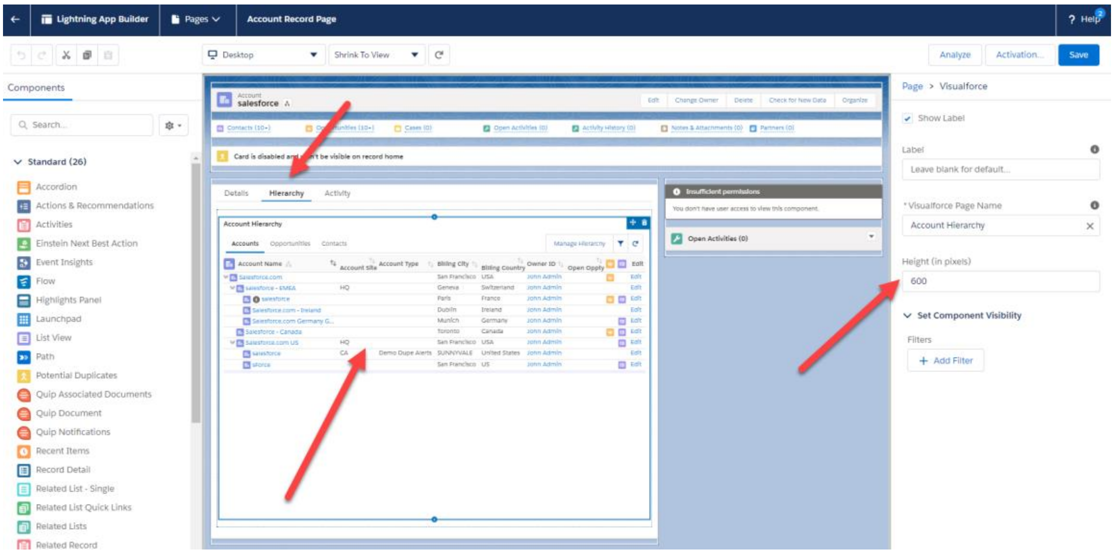
In the following sections we will show you how to add/deploy each individual element.

7.1 Adding the Inline Hierarchy to the Account Detail Page

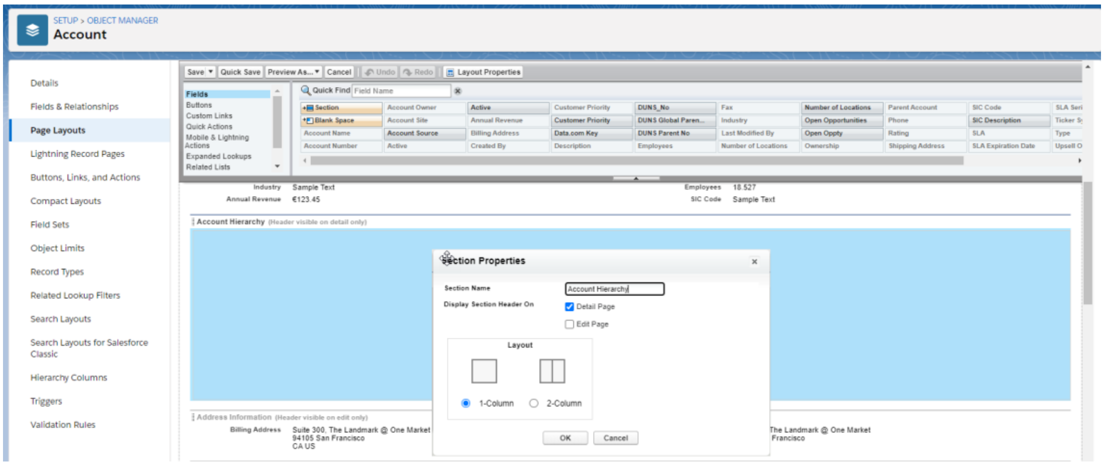
The Inline Hierarchy page is a Visualforce page, which you can add to the Account Detail page.
In Lightning you can add a page tab and place the Account Hierarchy here.



To add the VF page as a separate Tab, edit the page using the Page Editor in the Lighting App Builder, add the tab, and place the VF page on it:



In Classic, and Lightning you can use the Page Layout Editor to position the Visual Force page on your Account Detail page.



To add the Visual force (VF) page to the Detail Page, edit the page layout, and add the VF page where you want it. Using this approach, you must set a size of the VF page, and enable scrollbars to get an optimal view.

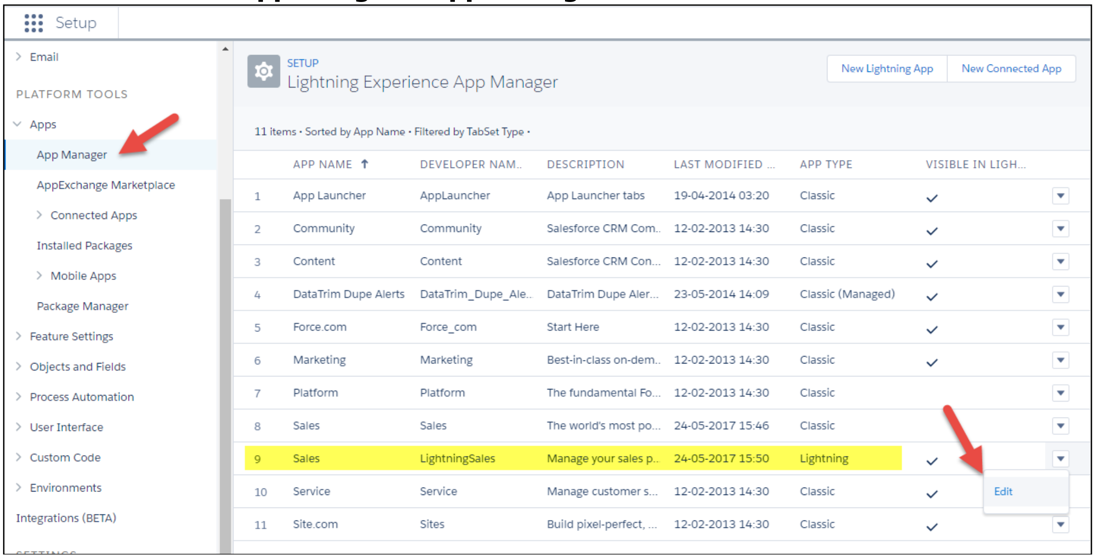
We recommend adding it in a separate section, which will allow users to collapse the view if needed, or to avoid too much white space.

To modify the behavior and display options of the Inline Hierarchy: go to the Account Organizer Setup page. See: 5.3 Display Options – Inline Hierarchy

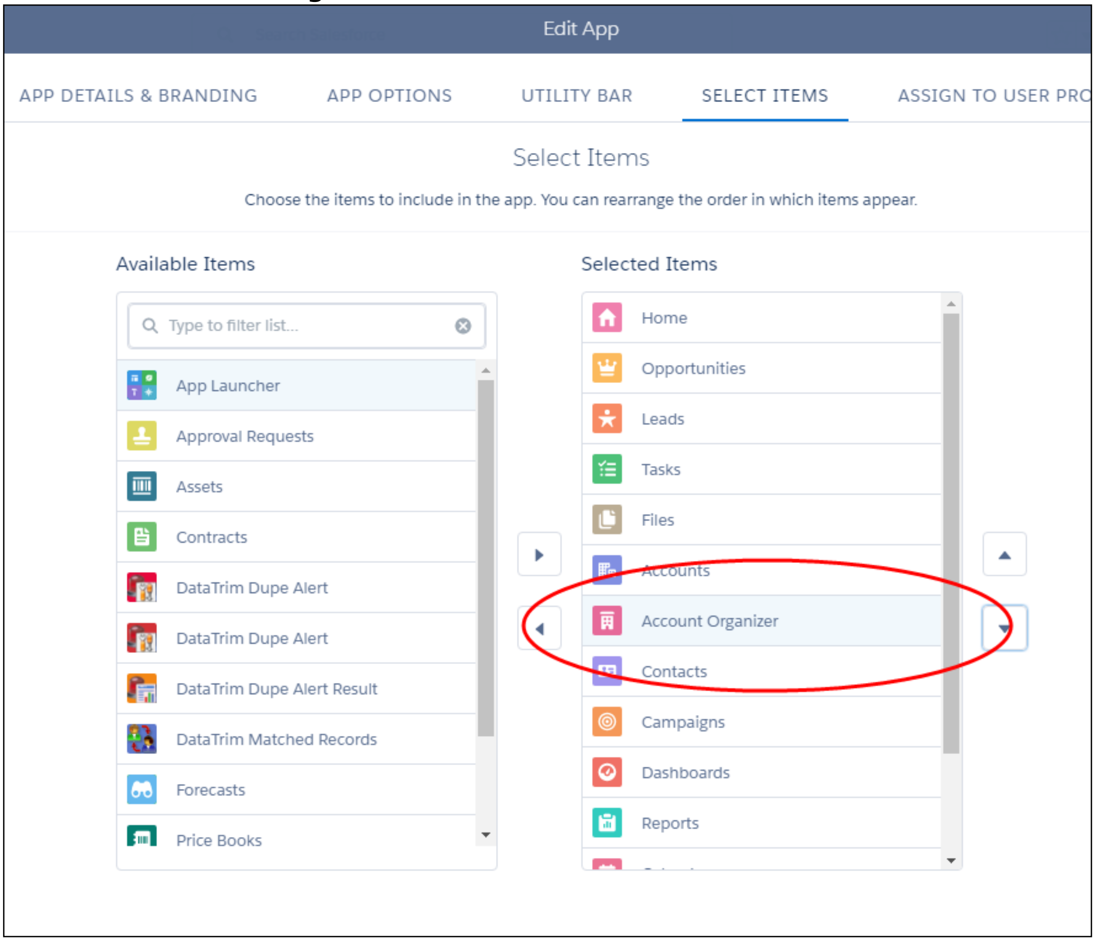
7.2 Adding the Account Organizer Tab to your App

7.2.1 Salesforce Lightning

1. Edit the Sales App using the App Manager:



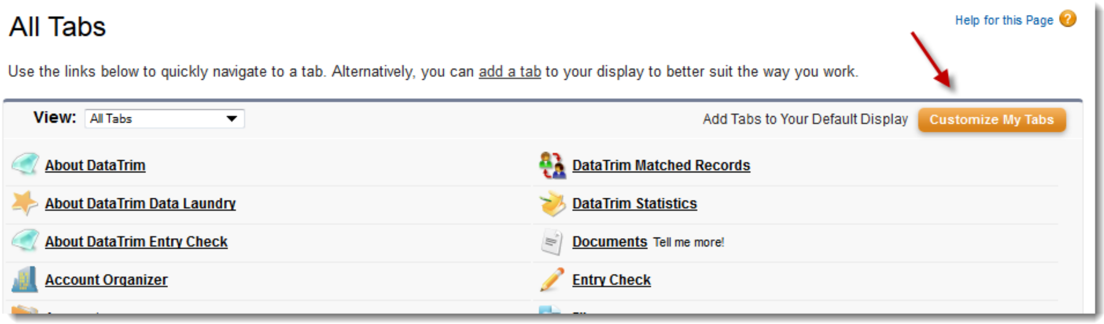
2. Add the Account Organizer Tab to the list of Selected Items



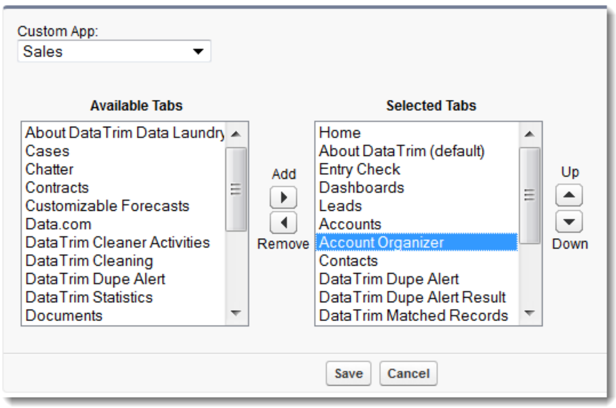
7.2.2 **Salesforce Classic**

The main Visual Force Page is associated with a Tab.
You can add this Tab by Customizing your Tabs – standard salesforce functionality.

1. Customize my Tabs (or edit the Tabs from the setup to change for all users).

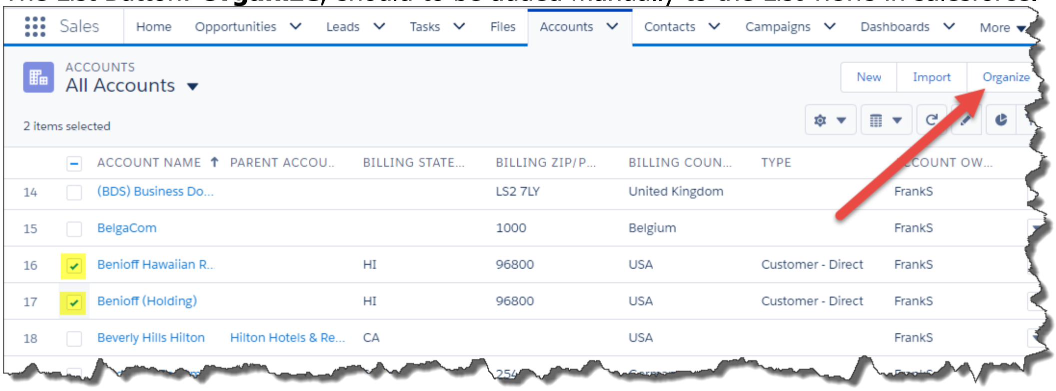


2. Customize my Tabs (or edit the Tabs from the setup to change for all users).



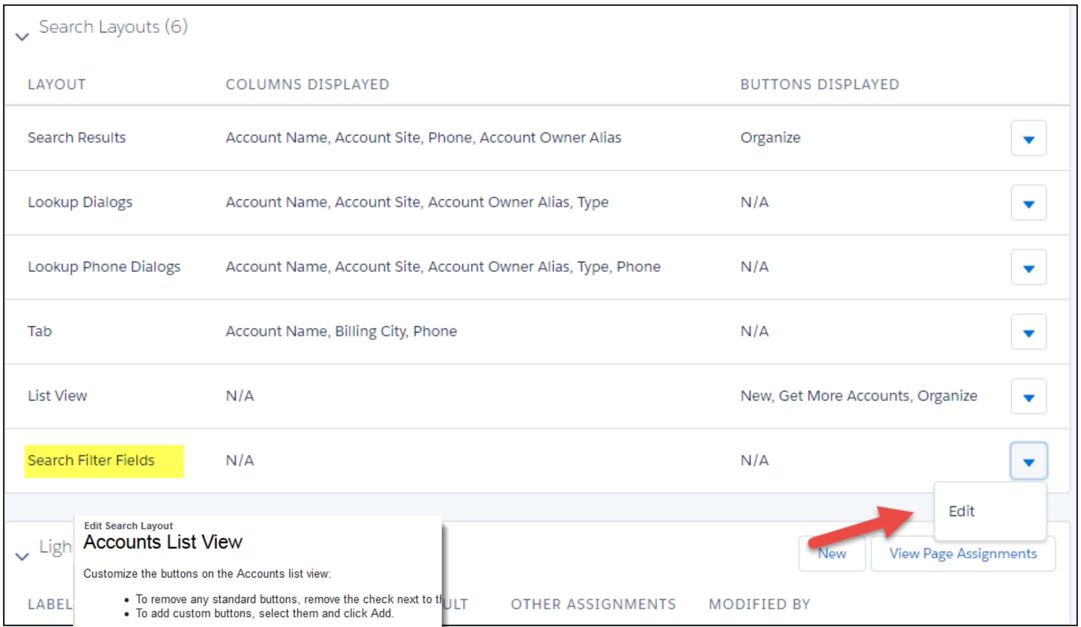
7.3 Adding List Button to Account Tab

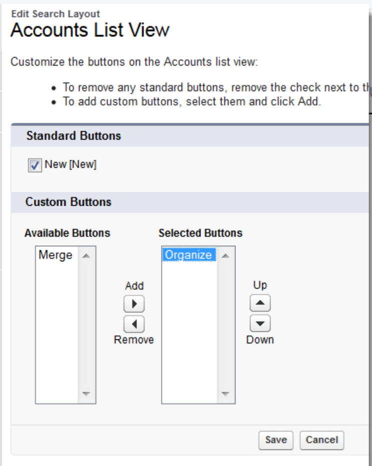
To allow you users to launch the Account Organizer from a list view on the Account Tab, you should add the Organizer button to the list view layout.
The List Button: **Organize**, should to be added manually to the List views in salesforce.



Modify the Accounts List View, and add the Organize button

1. Go to Setup->App Setup->Customize->Account->Search Layout and Edit the **Accounts List View**

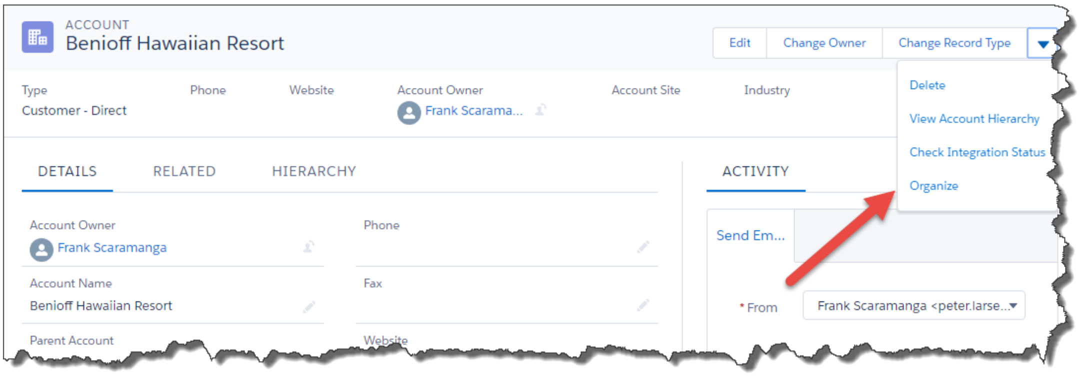




2. **Add the Organize button to the List of Selected Buttons**

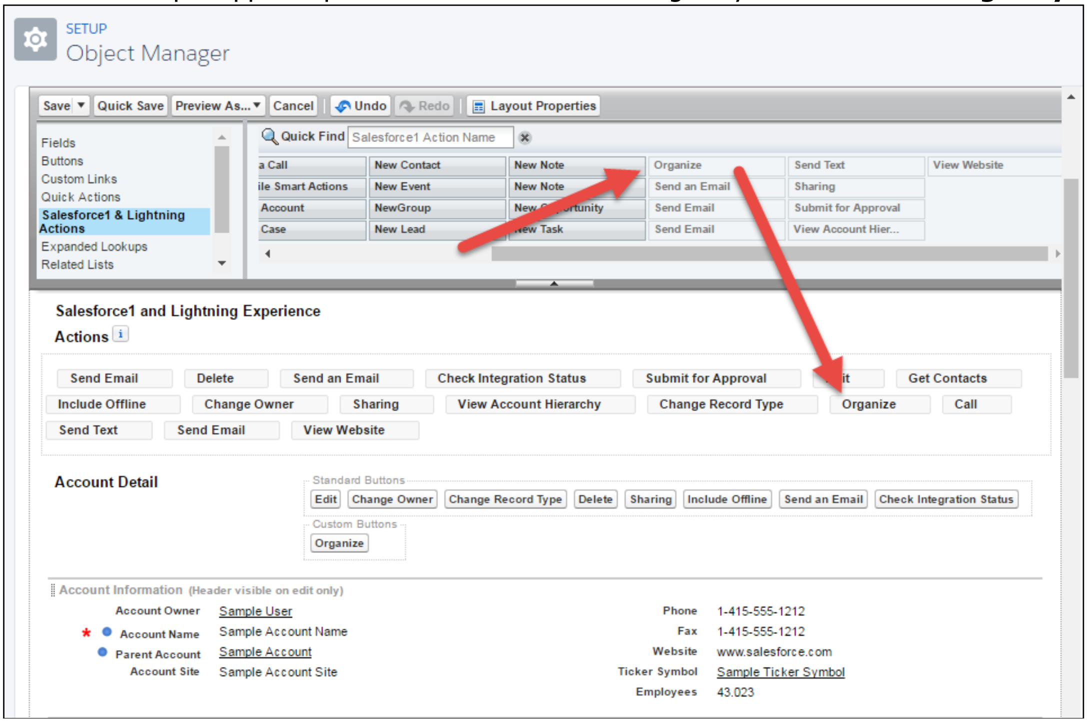
7.4 Adding Details Button to Account Page Layout

To allow you users to launch the Account Organizer directly from the Account Page layout, and thus start to build or maintain an account hierarchy around the current account, you should add the Organizer button to the Account Page Layout.



Like for the List button the Detail button: **Organize** needs to be added manually. Go to your Account Page Layout, and add the button.

1. Go to Setup->App Setup->Customize->Account->Page Layout And Edit the **Page Layout**



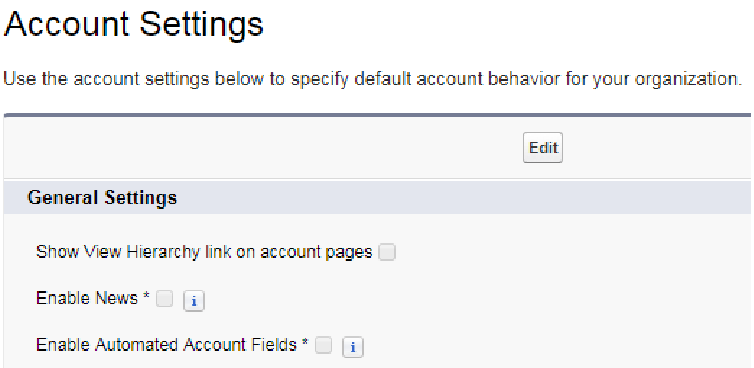
2. Drag the **Organize** button into the field for **Custom Buttons**

Note that you may have multiple page layouts in your organization. If you want the button to be available on multiple page layouts you will need to add it to each page layout.

7.5 Removing salesforce links to View Hierarchy

To avoid confusion for your users, you may now want to remove the salesforce link to "View Hierarchy" as this points to the simplified salesforce view.

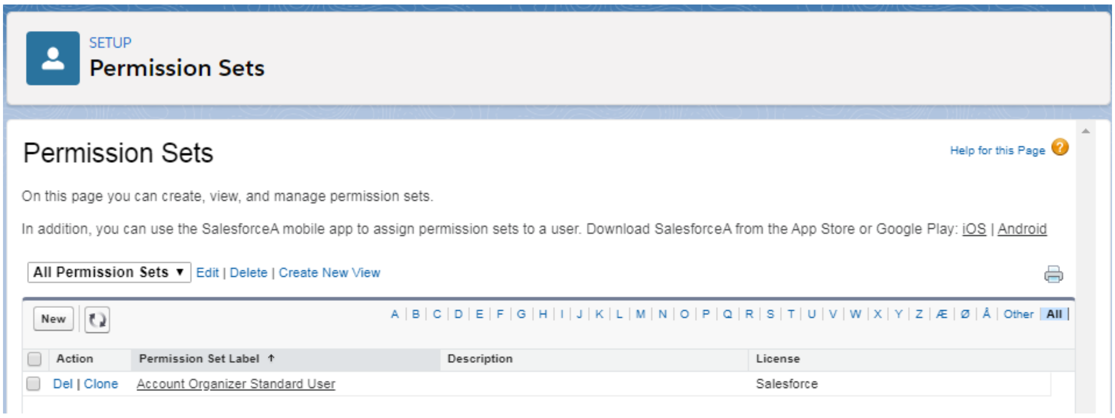
In the salesforce Setup: Go to Customize and then to Account. Towards the Button you will find the menu item: Account Settings.
Untick the checkbox "Show View Hierarchy link on account pages" like seen below:



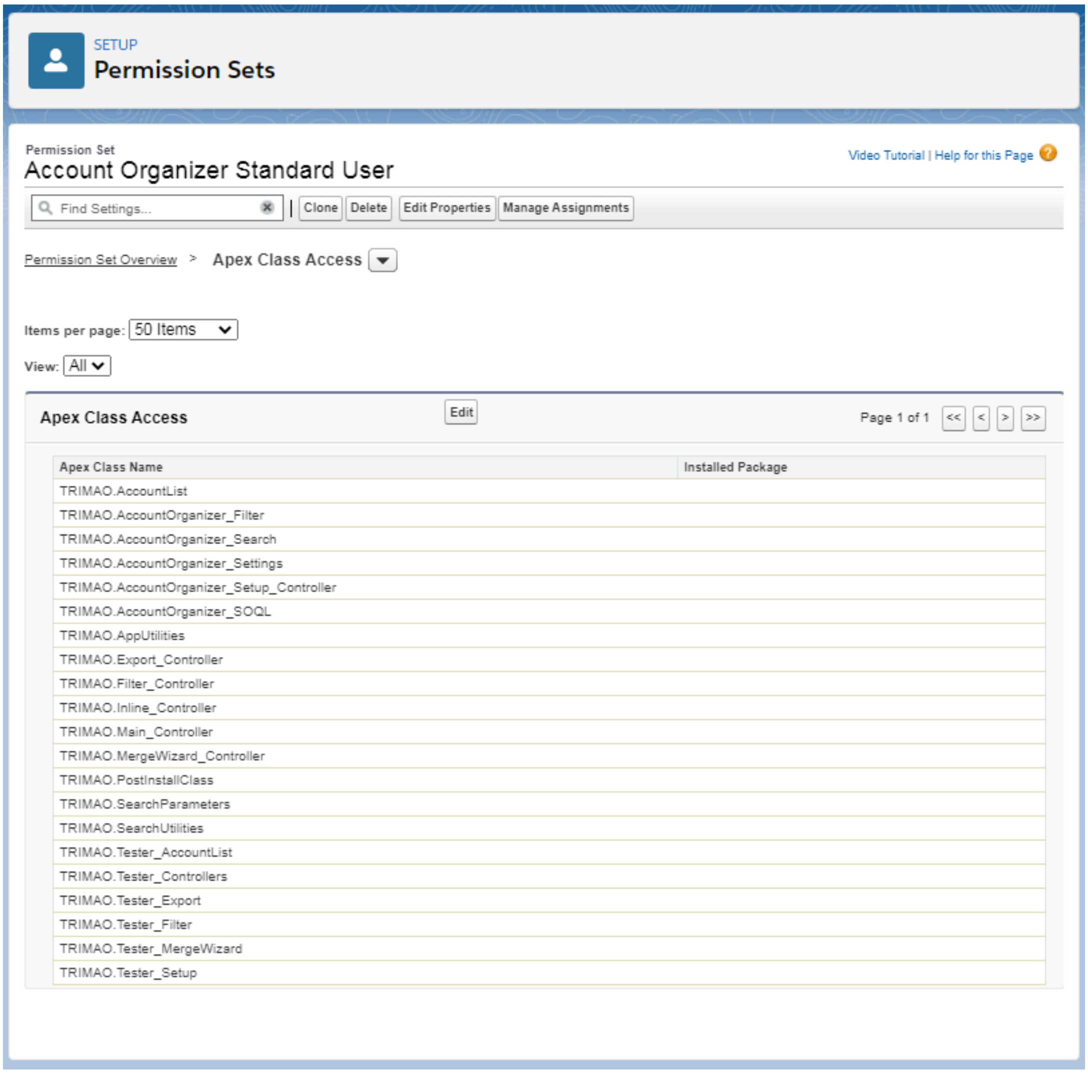
8 User Profiles

As everything is salesforce is controlled by permissions you might need to check the profile of your users to make sure that they have access to the DataTrim Account Organizer elements. -And do not forget to allocate a license to the user in order for them to use the application.

To make the permission setup as easy as possible we have provided a permission set which when assigned to user/profile will take care of it all, granting the user access to all the components from the Account Organizer Package.



8.1.1 Enabled Apex Class Access



8.1.2 **Enabled Visualforce Page Access**