

Account Hierarchy Setup Instructions:

Make sure my.domain has been set up for your Salesforce instance before editing your page layout.

Add the Hierarchy Preview Component to the Account record page layout:

1. When viewing an Account record, choose the “Edit Page” option from the gear icon at the top right of the page to load the Lightning App Builder.
2. From the Custom Lightning Component section, drag the “Account Hierarchy” to your desired location in the canvas.
3. Click Save.
4. Activate the page.
5. Click Back to return to the record page.

Add the View Hierarchy action to the Account record:

1. From Setup, navigate to Customize | Accounts | Page Layouts.
2. Click Edit next to the layout you want to add the View Hierarchy action to.
3. Click the Salesforce1 Actions item in the Account Layout builder.
4. Drag the “View Hierarchy” action to the “Salesforce1 and Lightning Experience Actions” section on the page layout.
5. Click Save.

Customize the columns that appear on your hierarchy:

1. From the App Launcher (top right corner of the page), choose Account Hierarchy.
2. Select Account Hierarchy Setup.
3. From the Available section, choose up to 10 fields you would like to display and arrange them in the order you prefer.
4. Select up to 4 fields you would like to display in the hover details.