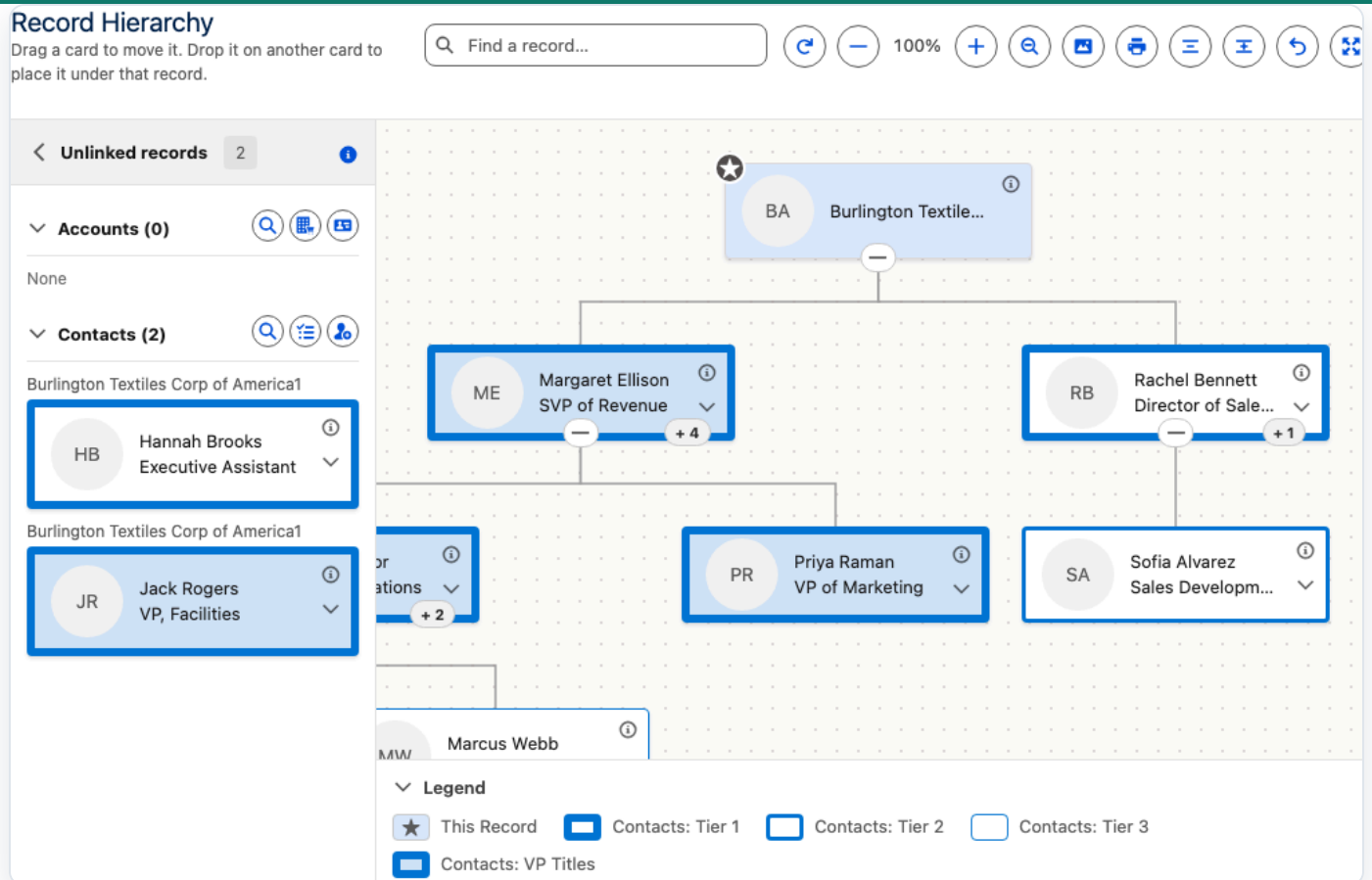


Hierarchy Viewer

See who reports to whom, and what sits beneath it, as a live org chart on any record page.



6

levels in one chart, each its own object

0

lines of code to add a new chart

5

languages: English, German, Spanish, French (CA), Portuguese (BR)

Hierarchy Viewer turns a lookup relationship into an interactive chart your team can read at a glance, search, restyle with rules, and **re-organise by dragging a card**. One component serves every chart; an admin describes each chart in a point-and-click app. No code, nothing outside Salesforce.

Relationship data is hard to read in a list. A chart is not.

Reporting lines, parent accounts and account-contact-opportunity trees live in lookups. Standard Salesforce shows them as flat related lists, so people export to a spreadsheet or redraw the structure in a slide deck that is out of date the next week.

1

Understand an account in seconds

A reporting tree, or an Account with its Contacts and their Opportunities, is **one picture** on the record page where the work happens.

2

Fix the structure where you see it

Users with the right access **drag a card onto its new parent** (or use Move To on touch and keyboard) and the lookup is updated. Owners can be changed from a card too.

3

Make what matters stand out

Highlight Rules restyle the cards that match conditions, for example every VP, with a legend underneath so nobody has to guess what a colour means.

4

Roll-ups and vacancies built in

A badge such as Team 14 counts or totals everyone beneath a card. **Open positions** show as dashed vacancy cards.

5

One component, every chart

Contacts by Reports To, Accounts by parent, or a mixed chart: you add a configuration, not a new component. **No developer needed.**

6

Safe by design

Moves and edits obey each user's field-level security. Read Only users can look but never change. Three permission sets ship with the app.

Without Hierarchy Viewer

- Reporting lines live in related lists and a spreadsheet nobody trusts
- Re-parenting a record means opening it, editing a lookup and saving
- Spotting every VP or every vacancy means building a report
- A new chart for another object means a developer

With Hierarchy Viewer

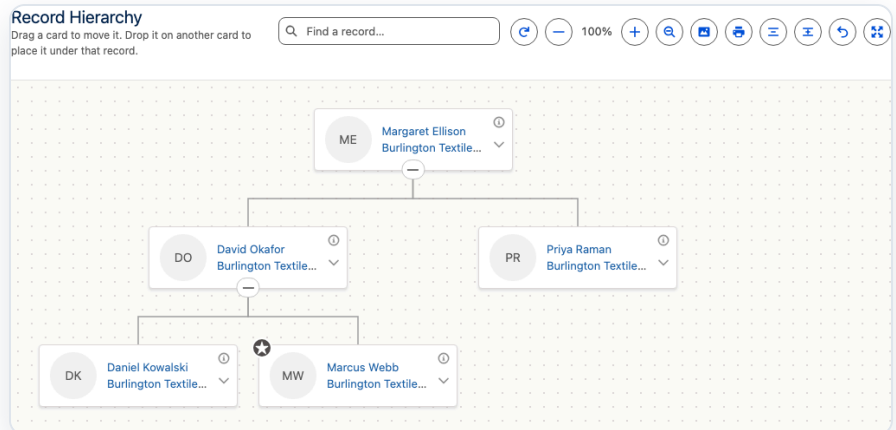
- One picture of the whole structure, on the record page
- Drag a card onto its new parent, or use Move To
- Highlight Rules and roll-ups show what matters at a glance
- A new chart is a configuration an admin saves in minutes

WHAT IT DOES

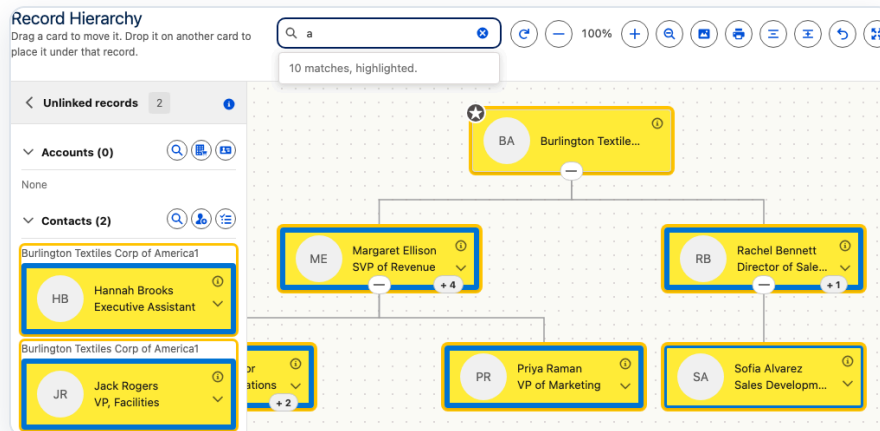
An org chart that works on real Salesforce data

Interactive chart on the record page

Every record is a card, joined to its parent by lines. The starred card is the record you are on. Collapse a branch, zoom, print or export the chart as an image.



A Contact's reporting tree.



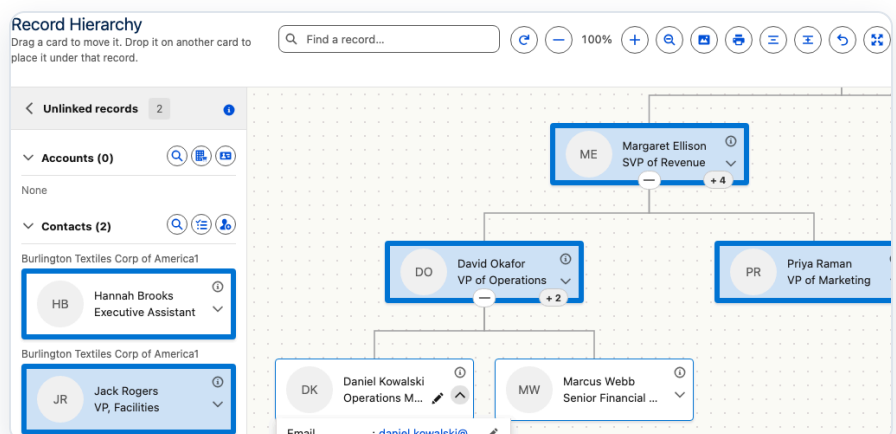
Find a record in a large chart.

Find anyone, instantly

Type a name into Find and the chart goes to the match. Records not yet placed in the hierarchy wait in the **Unlinked records** drawer, ready to be dragged in.

Cards that tell you more

Show a photo or initials, a name and the details you choose. The arrow opens more fields, the info icon opens a full pop-out with your own help text.



A card opened to show further fields.

WHAT IT DOES, CONTINUED

Configured by admins, loved by users

Highlight a card whose record matches a condition you set --- background color, outline, and a badge icon, independently. The highest-priority active rule that matches and sets a given property wins it; a rule left blank for a property lets a lower-priority rule, or the tier default above, supply it instead.

Label	Active	Priority	Conditions
VP Titles	✓	10	Title Contains VP

Add Highlight Rule

Label Priority ☒ Active

Style

Background Color Outline Weight Badge Icon Name

Conditions

Each condition gets a number; the Condition Logic box combines them with AND, OR and NOT. No conditions matches every record of this level.

Field Operator Value

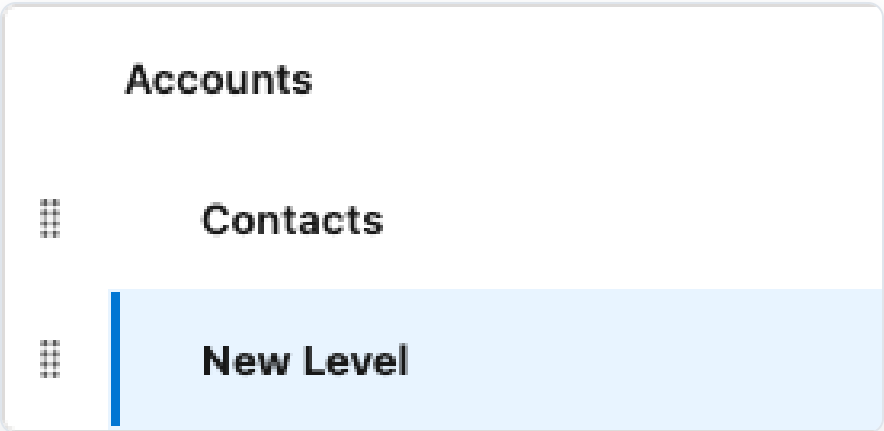
+ Add Condition

Condition Logic

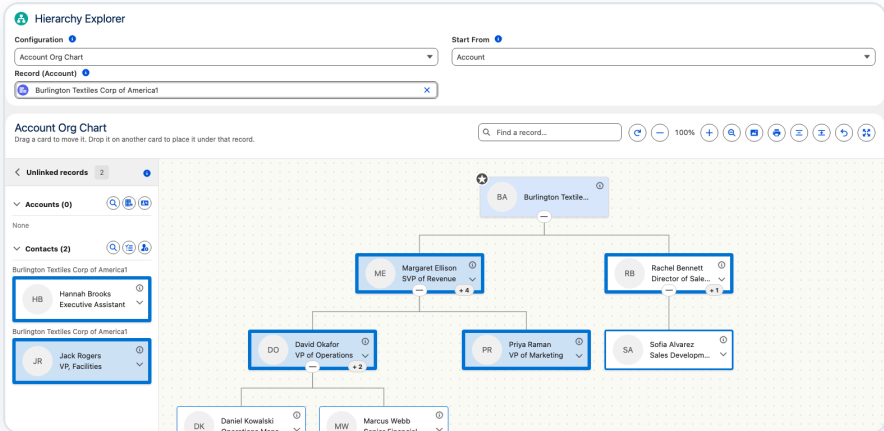
Highlight Rules in the configuration app.

Charts of up to six levels

Describe each level once: its object, the lookup that joins it to the level above, its cards and its pop-out. A live preview redraws as you edit.



The level tree in the editor.



The Hierarchy Explorer tab.

Highlight Rules

Style cards by what they are: a title, a status, an amount. Each rule is built from conditions, and the legend explains every colour.

Hierarchy Explorer

Open any record's chart from the App Launcher without visiting its page, useful for teams who live in the chart.

HOW IT WORKS

Up and running in four steps

1. Assign access

Give admins the **Hierarchy Viewer Admin** permission set and users the User or Read Only set.

2. Describe a chart

In the app, pick the object and its parent lookup. Add levels, card fields and colours. Check the live preview.

3. Place it

Drag the **Hierarchy** component onto the record page in Lightning App Builder and choose the configuration.

4. Open a record

The chart appears. Search, expand, drag, export. Change the configuration any time.

Who it is for

- **Sales and account teams.** map stakeholders and see who reports to whom before a call.
- **Revenue and sales operations.** keep territories, parent accounts and ownership tidy without spreadsheets.
- **Admins.** add a chart for another object in minutes, with no deployment.

Built for trust

- **Native to Salesforce.** Nothing leaves your org and nothing external is called.
- **Respects security.** Moves and edits follow field-level security and sharing.
- **Three permission sets:** Admin, User and Read Only, plus a custom permission to hide the component from people without access.
- **In-app Administrator and User guides** in English, German, Spanish, Canadian French and Brazilian Portuguese.

Everything included

- ✓ Charts of up to six levels, each its own object
- ✓ Cards with photo or initials, name and chosen fields
- ✓ Details pop-out with rich-text help text
- ✓ Highlight Rules per level, with a legend
- ✓ Roll-ups: counts and totals on a card
- ✓ Open-position (vacancy) cards
- ✓ Drag and drop re-parenting, plus Move To
- ✓ Change owner from a card

- ✓ Optional field editing right on a card
- ✓ Find, expand and collapse, zoom
- ✓ Export the chart as an image, or print it
- ✓ Hierarchy Explorer tab
- ✓ Live preview while configuring
- ✓ Admin, User and Read Only permission sets
- ✓ In-app guides in five languages
- ✓ Works on desktop and touch

See it on your own data

Hierarchy Viewer is built, tested and documented. Ask for a walk-through of a chart built from your own Contacts, Accounts or custom objects.