



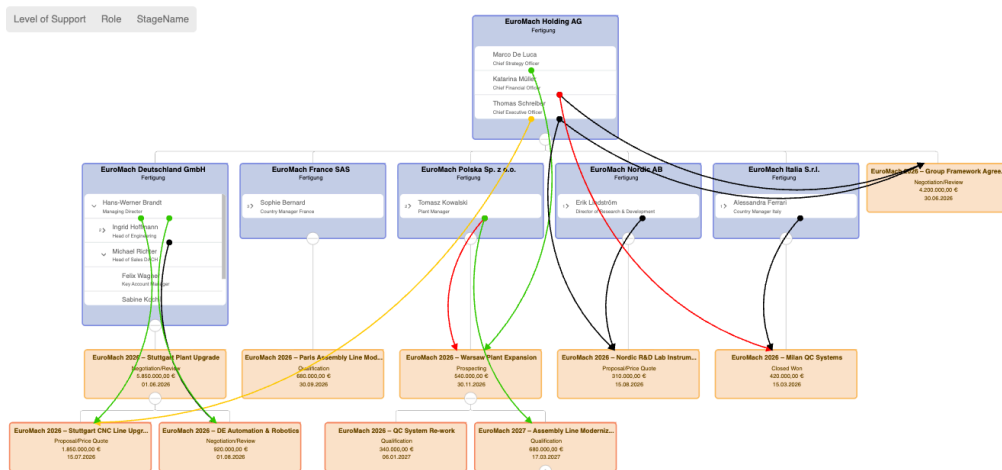
STRATEGIC . SALESFORCE . PARTNER .

# Everything Xplorer

Interactive hierarchy visualization for every Salesforce record.

## AT A GLANCE

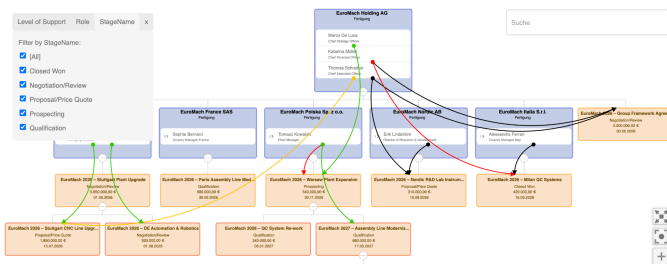
Salesforce holds the answers – but only if your people can see how the records connect. Everything Xplorer turns any record page into a living, interactive org chart. Starting from the record you are on, it visualizes parent, child and referenced records across standard and custom objects – so business users grasp complex hierarchies at a single glance. No reports to build. No data to export. Just open a record – and see the whole picture.



Above: Corporate account hierarchy with Contact reporting lines and Opportunities – Contact Roles rendered as coloured influence edges, forming a live Buying Table.

## EVERYTHING XPLORER · FEATURE TOUR

Designed for adoption · Everything Xplorer is built around four principles: keep the user in context, let them filter to what matters, let them search their way to any node, and let them choose the layout that fits the task. No training required.



## FILTER · FOCUS

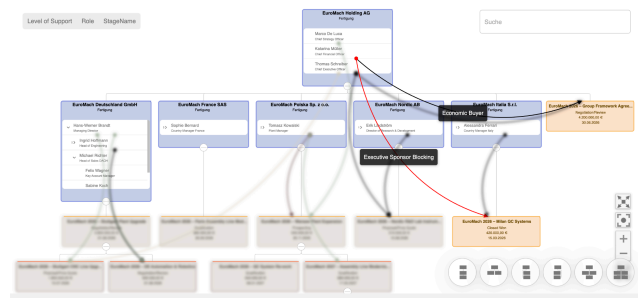
Slice the graph to the question at hand

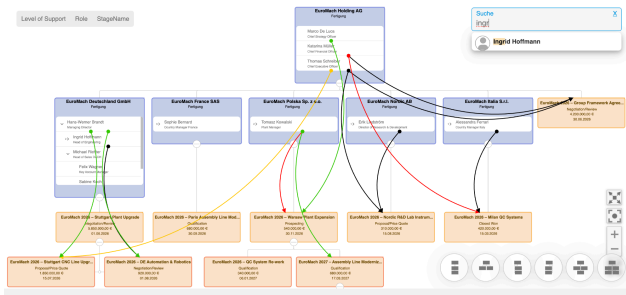
Three filter dimensions ship out of the box: Opportunity Stage, Contact Role, and a configurable Level of Support. Tick the values that matter – everything else fades away. Teams stop drowning in detail and start having the conversation that moves the deal forward.

## COLOUR · CONTEXT

Influence edges tell the whole story

Every Contact Role becomes a coloured edge between contact and opportunity. Green signals support, red signals resistance, black marks the economic buyer, amber the influencer. Hover any edge to see the full role label – the Buying Table becomes self-explanatory.





## SEARCH · JUMP

### Find anyone, anywhere in the hierarchy

Type three letters. Account Explorer auto-completes across every contact and record in the visible graph – even the collapsed branches. One click and the view jumps, expands and highlights the match. No scrolling, no guessing.

## USE CASES

01

### SALES · KEY ACCOUNTS

#### Corporate structures with contacts and a live Buying Table

Visualise multi-tier Account hierarchies together with Contact reporting lines and every Opportunity in play. Contact Roles surface as coloured influence edges – supportive, blocking, economic, influencer – so sales teams instantly see who decides, who recommends, and where relationships still need to be built.

02

### SERVICE · SUPPORT

#### Cases mapped onto the Asset hierarchy

Follow an asset from top-level installation down to every component, with open and historical Cases attached at the exact level where they occurred. Service teams see whether an issue is isolated or systemic, and account managers spot at-risk customers without running a single report.

03

### PARTNER · CHANNEL

#### Distributor → Reseller → End Customer

Channel hierarchies rarely fit a flat data model. Everything Xplorer reveals the full route-to-market tree including Deal Registrations, co-sell Opportunities and overlapping partner relationships – giving channel managers a clean line of sight across every layer of their ecosystem.

04

### FINANCIAL · SERVICES

#### Households, members and linked financial accounts

In Financial Services Cloud, relationships are the business. Advisors see the household, its members, financial accounts, goals and referrals in one graph – making cross-sell opportunities, life-event triggers and compliance context immediately obvious.

## CUSTOMER SUCCESS



**MERLINDA BALAJ**

Team Lead Salesforce  
Fonds Finanz Maklerservice GmbH

“  
The Sales Cockpit has become a central management tool for our key account management team and our brokers. Clear KPIs enable much more focused revenue management, and FaBelhaFT's integrated organizational chart provides the transparency and efficiency we need to manage our broker structures.

### SEE IT ON YOUR OWN DATA

Book a 30-minute demo.

We will install Everything Xplorer in your sandbox and walk you through the use cases that matter most to your business – with your records, your hierarchies, your questions.

Email us at [info@fabelhaft-beratung.de](mailto:info@fabelhaft-beratung.de)

**FABELHAFT**  
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