OrgChartPlus

Custom Object Guide

Contents

Introduction

This guide is to aid you in configuring OrgChartPlus so that it can save charts related to objects other than Account and Opportunity. Please read through this document to understand the object schemas that are supported before attempting to parameterise the tool.

We strongly recommend you working with SalesMethods' professional service team who can aid you in creating the appropriate parameterisation script.

This document assumes you are familiar with Salesforce and OrgChartPlus.

You will need to understand:
- Where your contact information will be stored.
- Where your team member information will be stored.
- If your contacts will have roles.
- What custom fields you will want OCP to access. Fields can be:
  - Shared across all charts, for instance fields on your contact object.
  - Shared across all charts linked to a single object, such as the field "opinion".
  - Unique to the chart, such as the contact box border colour.

Details about configuring the Matrix and Org Chart views is covered elsewhere.

Schema Overview
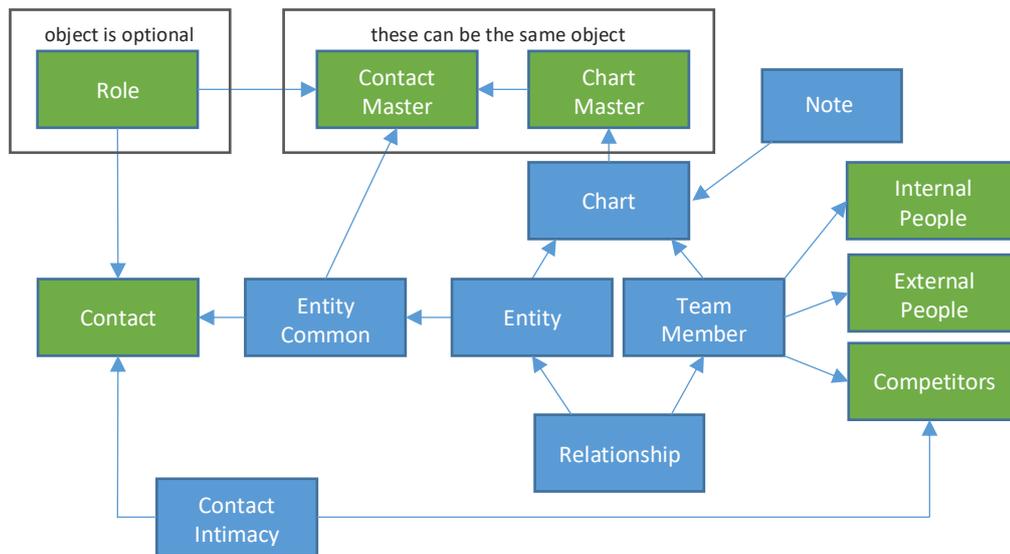
The schema diagram above shows how the OrgChartPlus objects (in blue) relate to the standard and existing your custom objects (in green). Each of the arrows represents a master-detail or lookup relationship.

The primary object of interest is the "Chart Master". This is the object that will hold the org charts and in a standard configuration would be the Account or Opportunity object. The common use-case for saving charts to custom objects is to facilitate account plan charts. In this scenario, the plan object will be the Chart Master.

The diagram above introduces the object "Contact Master". This will be an object related to your Role object and/or the "Entity Common". In most configurations, the Contact Master and Chart Master are the same object. For instance, the standard OpportunityContactRole will link the Contact to the Opportunity. OCP allows you to configure the objects so the Contact links to another object than the Chart Master. The only requirement for OCP to function this way is that the Contact Master can be identified from the Chart Master. There must be a related lookup on the Chart Master object.

The schema shows Contact and Role. Contact will usually be the standard Salesforce Contact object but can be a custom object. The Role object is optional and will link the Contact to the Contact Master/Chart Master.

To the right of the diagram are your "team member source" objects. Team members can include internal people such as Users and non-Salesforce users, external contacts, and competitors. OCP comes with custom objects for non-Salesforce users and Competitors. You can use these or use your own. The list of team member sources is up to you and can number 0, 1, or many.

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Implementing the Schema

You will need to create five custom objects and update two objects, in this sequence:

1. Create Chart
2. Create Entity Common
3. Create Entity
4. Create Team Member
5. Create Relationship
6. Create Notes
7. Modify Contact Intimacy
8. Modify Chart Master

SalesMethods recommends naming your custom objects with a common prefix to help identify the objects as being related in the setup objects list and being distinct from the other OrgChartPlus objects. The name prefix with be denoted as *** in the details below.

As you process through the list, make a note of the custom object names and fields names that you must generate. These will be needed for the parameterisation script. Most of the field names below are hard-coded in the software so they can be ignored.

Create the Chart object

Object Name	***_OrgChart
Data Type	Text
Record Name	OrgChart Name
Allow Reports	No
Allow Activities	No
Track Field History	No
Allow Sharing	Yes but is not required
Allow Bulk API Access	Yes but is not required
Allow Streaming API Access	Yes but is not required
Deployment Status	Deployed
Allow Search	No

Create the fields on the Chart object:

Purpose	This is a master-detail field that links to the Chart Master object. Name it accordingly.
Data Type	Master-Detail
Related To	Chart Master
Child Relationship Name	OrgChart
Sharing Setting	Read/Write

Data Type	Checkbox
Field Label	AutomaticChart
Field Name	AutomaticChart
API Name	AutomaticChart__c
Default Value	Unchecked

Data Type	Long Text Area
Field Label	Import Filter
Field Name	ImportFilter
API Name	ImportFilter__c
Default Value	
Visible Lines	3
Length	32,768

Data Type	Long Text Area
Field Label	Contact Filter
Field Name	ContactFilter
API Name	ContactFilter__c
Default Value	
Visible Lines	3
Length	32,768

Data Type	Number
Field Label	Version
Field Name	Version
API Name	Version__c
Required	No
Unique	No
External Id	No
Default Value	
Length	6
Decimal Places	0

Data Type	Long Text Area
Field Label	Place Holders
Field Name	PlaceHolders
API Name	PlaceHolders__c
Default Value	
Visible Lines	3
Length	131,072

Create the Entity Common object

Object Name	***_OrgChartEntityCommon
Data Type	Auto Number
Record Name	Id
Allow Reports	No
Allow Activities	No
Track Field History	No
Allow Sharing	Yes but is not required
Allow Bulk API Access	Yes but is not required
Allow Streaming API Access	Yes but is not required
Deployment Status	Deployed
Allow Search	No

Create the fields on this object:

Purpose	This is a master-detail field that links to the Contact Master or Chart Master object. Name it accordingly.
Data Type	Master-Detail
Related To	Contact Master
Child Relationship Name	***_OrgChart_Entity_Common
Sharing Setting	Read/Write

Data Type	Lookup
Field Label	Contact
Field Name	Contact
API Name	Contact__c
Related To	Your Contact object
Child Relationship Name	***_OrgChart_Entity_Common

Data Type	Long Text Area
Field Label	MatrixText
Field Name	MatrixText
API Name	MatrixText__c
Default Value	
Visible Lines	3
Length	2000

Create the OrgChart Entity object

Object Name	***_OrgChartEntity
Data Type	Auto Number
Record Name	Id
Allow Reports	No
Allow Activities	No
Track Field History	No
Allow Sharing	Yes but is not required
Allow Bulk API Access	Yes but is not required
Allow Streaming API Access	Yes but is not required
Deployment Status	Deployed
Allow Search	No

Create the fields on this object:

Purpose	This is a master-detail field that links to the OrgChart object.
Data Type	Master-Detail
Field Label	OrgChart
Field Name	OrgChart
API Name	OrgChart__c
Related To	OrgChart object just created
Child Relationship Name	***_OrgChart_Entities
Sharing Setting	Read/Write

Purpose	This is a master-detail field that links to the EntityCommon object.
Data Type	Master-Detail
Field Label	Entity Common
Field Name	EntityCommon
API Name	EntityCommon__c
Related To	Entity Common just created
Child Relationship Name	***_OrgChart_Entities
Sharing Setting	Read/Write

Data Type	Number
Field Label	ChartPosX
Field Name	ChartPosX
API Name	ChartPosX__c
Required	No
Unique	No
External Id	No
Default Value	
Length	8
Decimal Places	8

Data Type	Number
Field Label	ChartPosY
Field Name	ChartPosY
API Name	ChartPosY__c
Required	No
Unique	No
External Id	No
Default Value	
Length	8
Decimal Places	8

Data Type	Text
Field Label	Colour
Field Name	Colour
API Name	Colour__c
Required	No
Unique	No
Case Sensitive	
External Id	No
Default Value	
Length	7

Data Type	Number
Field Label	DisplayOrder
Field Name	DisplayOrder
API Name	DisplayOrder__c
Required	No
Unique	No
External Id	No
Default Value	
Length	5
Decimal Places	0

Data Type	Text Area
Field Label	HideFields
Field Name	HideFields
API Name	HideFields__c
Required	No
Default Value	

Data Type	Number
Field Label	MoleculePosX
Field Name	MoleculePosX
API Name	MoleculePosX__c
Required	No
Unique	No
External Id	No
Default Value	
Length	8
Decimal Places	8

Data Type	Number
Field Label	MoleculePosY
Field Name	MoleculePosY
API Name	MoleculePosY__c
Required	No
Unique	No
External Id	No
Default Value	
Length	8
Decimal Places	8

Data Type	Number
Field Label	ShowFlags
Field Name	ShowFlags
API Name	ShowFlags__c
Required	No
Unique	No
External Id	No
Default Value	
Length	18
Decimal Places	0

Create the TeamMember object

Object Name	***_OrgChartTeamMember
Data Type	Text
Record Name	*** OrgChart TeamMember Name
Allow Reports	No
Allow Activities	No
Track Field History	No
Allow Sharing	Yes but is not required
Allow Bulk API Access	Yes but is not required
Allow Streaming API Access	Yes but is not required
Deployment Status	Deployed
Allow Search	No

Create the fields on this object:

Purpose	This is a master-detail field that links to the OrgChart object.
Data Type	Master-Detail
Field Label	OrgChart
Field Name	OrgChart
API Name	OrgChart__c
Related To	OrgChart object just created
Child Relationship Name	***_OrgChart_TeamMembers
Sharing Setting	Read/Write

Data Type	Lookup
Field Label	Contact
Field Name	Contact
API Name	Contact__c
Related To	Your Contact object
Child Relationship Name	***_OrgChart_TeamMembers
Sharing Setting	Read/Write

Data Type	Lookup
Field Label	User
Field Name	User
API Name	User__c
Related To	Your User object
Child Relationship Name	***_OrgChart_TeamMembers
Sharing Setting	Read/Write

Data Type	Number
Field Label	ChartPosX
Field Name	ChartPosX
API Name	ChartPosX__c
Required	No
Unique	No
External Id	No
Default Value	
Length	8
Decimal Places	8

Data Type	Number
Field Label	ChartPosY
Field Name	ChartPosY
API Name	ChartPosY__c
Required	No
Unique	No
External Id	No
Default Value	
Length	8
Decimal Places	8

Data Type	Number
Field Label	DisplayOrder
Field Name	DisplayOrder
API Name	DisplayOrder__c
Required	No
Unique	No
External Id	No
Default Value	
Length	5
Decimal Places	0

Data Type	Number
Field Label	MoleculePosX
Field Name	MoleculePosX
API Name	MoleculePosX__c
Required	No
Unique	No
External Id	No
Default Value	
Length	8
Decimal Places	8

Data Type	Number
Field Label	MoleculePosY
Field Name	MoleculePosY
API Name	MoleculePosY__c
Required	No
Unique	No
External Id	No
Default Value	
Length	8
Decimal Places	8

Data Type	Number
Field Label	ShowFlags
Field Name	ShowFlags
API Name	ShowFlags__c
Required	No
Unique	No
External Id	No
Default Value	
Length	18
Decimal Places	0

Create the Relationship object

Object Name	***_OrgChartRelationship
Data Type	Auto Number
Record Name	Id
Allow Reports	No
Allow Activities	No
Track Field History	No
Allow Sharing	Yes but is not required
Allow Bulk API Access	Yes but is not required
Allow Streaming API Access	Yes but is not required
Deployment Status	Deployed
Allow Search	No

Create the fields on this object:

Purpose	This is a master-detail field that links to the OrgChart object.
Data Type	Master-Detail
Field Label	OrgChart
Field Name	OrgChart
API Name	OrgChart__c
Related To	OrgChart object just created
Child Relationship Name	***_OrgChart_Relationships
Sharing Setting	Read/Write

Data Type	Lookup
Field Label	Child Entity
Field Name	ChildEntity
API Name	ChildEntity__c
Related To	OrgChart Entity object jus created
Child Relationship Name	***_OrgChart_Relationships

Data Type	Lookup
Field Label	Child TeamMember
Field Name	ChildTeamMember
API Name	ChildTeamMember__c
Related To	OrgChart TeamMember object just created
Child Relationship Name	***_OrgChart_Relationships

Data Type	Lookup
Field Label	Parent Entity
Field Name	ParentEntity
API Name	ParentEntity__c
Related To	OrgChart Entity just created
Child Relationship Name	***_OrgChart_Relationships1

Data Type	Lookup
Field Label	Parent TeamMember
Field Name	ParentTeamMember
API Name	ParentTeamMember__c
Related To	OrgChart TeamMember just created
Child Relationship Name	***_OrgChart_Relationships1

Data Type	Picklist
Field Label	Type
Field Name	Type
API Name	Type__c
Required	No
Values	Manager Knows Influences Collaborates Socialises Supplies Supporter of In Conflict with

Data Type	Lookup
Field Label	Child Note
Field Name	ChildNote
API Name	OrgChartPlus__ChildNote__c
Related To	ADP OrgChart Note

Data Type	Lookup
Field Label	Parent Note
Field Name	ParentNote
API Name	OrgChartPlus__ParentNote__c
Related To	ADP OrgChart Note

Create the Note object

Object Name	***_OrgChartNote
Data Type	Text
Record Name	OrgChart Name
Allow Reports	No
Allow Activities	No
Track Field History	No
Allow Sharing	Yes but is not required
Allow Bulk API Access	Yes but is not required
Allow Streaming API Access	Yes but is not required
Deployment Status	Deployed
Allow Search	No

Create the fields on the Chart object:

Purpose	This is a master-detail field that links to the Chart Master object. Name it accordingly.
Data Type	Master-Detail
Related To	Chart Master
Child Relationship Name	OrgChart
Sharing Setting	Read/Write

Data Type	Checkbox
Field Label	AutomaticChart
Field Name	AutomaticChart
API Name	AutomaticChart__c
Default Value	Unchecked

Data Type	Long Text Area
Field Label	Import Filter
Field Name	ImportFilter
API Name	ImportFilter__c
Default Value	
Visible Lines	3
Length	32,768

Data Type	Long Text Area
Field Label	Contact Filter
Field Name	ContactFilter
API Name	ContactFilter__c
Default Value	
Visible Lines	3
Length	32,768

Data Type	Number
Field Label	Version
Field Name	Version
API Name	Version__c
Required	No
Unique	No
External Id	No
Default Value	
Length	6
Decimal Places	0

Data Type	Long Text Area
Field Label	Place Holders
Field Name	PlaceHolders
API Name	PlaceHolders__c
Default Value	
Visible Lines	3
Length	131,072

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Modify the Contact Intimacy object

If you added any new team member source objects or implemented a replacement for Contact then you will need to add fields to the Contact Intimacy object.

A lookup field linking Contact Intimacy to your custom contact object should be called something similar to "Contact" such as "CustomContact".

Lookup fields linking Contact Intimacy to your team member source objects should be prefixed with "TeamMember_" so for instance "TeamMember_CustomCompetitor__c".

Modify the Chart Master object

Please add the following field to your Chart Master object.

Data Type	URL
Field Label	Last OCP Export
Field Name	LastOCPExport
API Name	LastOCPExport__c
Description	URL of last OrgChartPlus image export

The user will need read and write access to this field but it does not need to be made available on their page layouts.

Preparing your icon file

If you want to use icons in your charts, then you will need to upload an icon zip file as a static resource. Unlike the icon files used with account or opportunity charts, this zip file will need to include the icons from the standard OrgChartPlus zip file. This is because the in-browser security restriction will prevent icons loaded from the OrgChartPlus package from being used when printing or exporting, resulting in a "tainted canvas" error message.

Please ask SalesMethods to provide you with a suitable zip file. You will need to like the icons you want to display on the screen.

Creating the Parameterisation Script

The process for creating the parametrisation script is as follows:
1. Open Setup > Installed Packages > Manage OrgChartPlus.
2. Open "Add Chart To Custom Object".
3. Pick your Chart Master object and click Save.
4. Define an "Objects" section. (details below)
5. Define a "Contact Relationships" section. (details below)
6. Define a "Team Source" section. (details below)
7. Define a "Matrix Columns" section.
8. Define a "Org Chart Text", "Org Chart Icons", and "Org Chart Border Items" sections.
9. Define a "Contact Popup" section.

Defining an "Objects" section

The Objects section is used to define the object, field and relationship names that you have chosen above. OCP will customise the data storage and GUI based on these values.

Create a JSON object containing the following fields:

Parameter	Description	Sample
contact	Object API Name for Contacts	Contact
contactName	Contact name field API name	Name
contactFirstName	Contact first name field API name	FirstName
contactLastName	Contact last name field API name	LastName
contactReportsToId	Contact reports to field API name	ReportsToId
contactDescription	Contact description field API name	Description
contactEmail	Contact email field API name	Email
contactMaster	Contact master field API name	AccountId
contactRoleRel	Relationship on contact object to role object	
contactMasterHierarchy	Field on the Contact Master object that links to other Contact Master objects to form a hierarchy (optional)	ParentId
contactMasterName	Contact Master name field API name	Name
master	Object API name of master object that links EntityCommon and Role	
masterName	Field or related field on the master that provides the master name	Name
masterCommonSrc	Field or related field on the master that provides the Id to match commonMasterId	Id
role	Role object name (optional)	
roleContactId	Contact lookup on role object (optional)	
roleMasterId	Master lookup on role object (optional)	
chart	Chart object	
chartMasterId	Field name on chart that links to the master object	
common	Common object	
commonMasterId	Field name on common that links to the master object	
commonPerChartRel	Related field name on common that links to the entities	
perChart	Per-chart object	
teamMember	Chart team member object	
relationship	Chart relationship object	
intimacyContact	Contact id field on the intimacy object	Contact__c

Defining a "Contact Relationships" section

OCP needs to understand how your Contact object relates to the Contact Master/Chart Master and how you want to find and import contacts.

You will need to create a new JSON array that lists one entry for each method of linking a Contact to the Contact Master. Each entry will need to relate to the Contact Master in one of two ways:

- A direct relationship from the Contact to the Contact Master, such as the AccountId field.

- An indirect relationship through a join object, such as OpportunityContactRole. The join object must have a relationship to the Contact object and another to the Chart Master. One of the join objects is usually the Role object.

For example, a standard Opportunity chart will have three entries. One for the AccountId on the Contact object, one for the AccountContactRole, and one for the OpportunityContactRole.

For a direct relationship, define the following fields:

Parameter	Description	Sample
importButton	On the Import Contact form, show a button to import all contacts that match this relationship to the Chart Master for the current chart.	true
importSearch	On the Import Contact form, show a text box to allow the related object to be searched for by name.	true
create	Use this relationship on the Create Chart form.	false
createDefault	Use this relationship on the Create Chart form by default when creating a new chart.	false
masterField	The field on the Contact object that links to the Contact Master object.	AccountId
dbNameMaster	The Id field on the Chart Master that should be used to find contacts with the matching masterField.	Master.Id
name	The name field on the Contact Master object.	Name
hierarchyId	The hierarchy lookup field on the Contact Master object. (optional)	ParentId

For indirect relationships, define the following fields:

Parameter	Description	Sample
importButton	On the Import Contact form, show a button to import all contacts that match this relationship to the Chart Master for the current chart.	true
importSearch	On the Import Contact form, show a text box to allow the related object to be searched for by name.	true
create	Use this relationship on the Create Chart form.	true
createDefault	Use this relationship on the Create Chart form by default when creating a new chart.	true
objName	The API name of the Join object.	AccountContactRole
idField	The field on the Join object that links to the Contact object	ContactId
masterField	The field on the Join object that links to the Contact Master object.	AccountId
dbNameMaster	The Id field on the Chart Master that should be used to find contacts with the matching masterField.	Master.Id
name	The name field on the Contact Master object.	Name
hierarchyId	The hierarchy lookup field on the Contact Master object. (optional)	ParentId

Defining a "Team Source" section

The Team Source section informs OCP as to the team member objects that you want to use in OCP and if each team member can relate directly to the Chart Master object via a Join object.

Multiple source objects can be grouped together to form a single source type. For instance, the standard OCP configuration allows the 'Team Member' type to consist of User, Contact, and SM_NonSFUser__c entries.

Define a JSON array for listing the team source types. Each entry will contain the following fields:

Parameter	Description	Sample
menuLabel	The label to show in the Team Member menu.	Import team member
formLabel	The title of the Import form for this type.	Import Team Member
allLabel	The label to show on the "import all" button in the import form. (optional)	All Team Members
nameLabel	The label to use in the import form grid and the import form text label. (optional)	Name
isCompetitor	Set to true for competitors and false for other types.	true
disableImportFormClose	Set to true to prevent the import from closing automatically when an entry is imported.	true
sources	An array of JSON objects to list each team member source object.	

Define a JSON array for listing the team source entries in the "sources" parameter. Each entry will contain the following fields:

Parameter	Description	Sample
objName	The object API name for the source object	User
name	The field name on the source object for the full name.	Name
fName	The field name on the source object for the first name. (optional)	FirstName
lName	The field name on the source object for the last name. (optional)	LastName
filter	A SOQL filter to restrict the list of source objects retrieved.	IsCompetitor__c=true
tmFieldName	Field on the Team Member object that links to this source object.	User__c
intFieldName	Field on the Contact Intimacies object that links to this source object. (optional)	TeamMember_User__c
join	A JSON object to describe how the team member object relates to the Chart Master.	

If the team source object links to the Chart Master via an intermediate Join object, then you can define this with a JSON object in the "join" parameter. The format for this JSON object is the same as for the Contact Relationship entries as documented above.

Adding a Visualforce Page

You will need to create two Visualforce pages to make OrgChartPlus available on your custom object. One is used to embed OCP into a page as a component, such as in a page layout, the other provides OCP on a whole page.

Create the ***OrgChartEmbeddedView page and paste in the following text, replacing the red section as appropriate:

```
<apex:page sidebar="false" showHeader="false"
standardController="Agreement_Legal_Entity__c"
extensions="OrgChartPlus.SM_OrgChartPlusPage">
<html xmlns="http://www.w3.org/1999/xhtml" xml:lang="en" lang="en">
    <head>
        <meta name="viewport" content="width=device-width, initial-scale=1,
minimum-scale=1, maximum-scale=1, userscalable=no"/>
        <style type="text/css">
            html, body, html body.sfdcBody { height:100%; width:100%;
margin:0px; padding:0px; overflow:hidden; }
            [id*=ocpComponent] { width:100%; height:100%; }
        </style>
    </head>
    <body>
        <OrgChartPlus:OCPEditor id="ocpComponent" masterId="{!masterId}"
chartId="{!chartId}" readOnly="{!readOnly}" defaultView="{!defaultView}"
noMenu="{!noMenu}" noFocus="{!noFocus}"/>
    </body>
</html>
</apex:page>
```

Create the ***OrgChartView page and paste in the following text, replacing the red section as appropriate:

```
<apex:page sidebar="false" showHeader="false"
standardController="Agreement_Legal_Entity__c"
extensions="OrgChartPlus.SM_OrgChartPlusPage">
<html xmlns="http://www.w3.org/1999/xhtml" xml:lang="en" lang="en">
    <head>
        <meta name="viewport" content="width=device-width, initial-scale=1,
minimum-scale=1, maximum-scale=1, userscalable=no"/>
        <style type="text/css">
            html, body, html body.sfdcBody { height:100%; width:100%;
margin:0px; padding:0px; overflow:hidden; }
            [id*=ocpComponent] { width:100%; height:100%; }
        </style>
    </head>
    <body>
        <OrgChartPlus:OCPEditor id="ocpComponent" masterId="{!masterId}"
chartId="{!chartId}" readOnly="{!readOnly}" defaultView="{!defaultView}"
noMenu="{!noMenu}" noFocus="{!noFocus}"/>
    </body>
</html>
</apex:page>
```

Making the page available to users

OCP is typically made available to your users via a button on the Chart Master page layout.

Create a new button in your Chart Master object:
1. Open the object in Setup
2. Click "New Button or Link"
3. Use these details:

Label	OrgChartPlus
Name	OrgChartPlus
Display Type	Detail Page Button
Behavior	Display in existing window without sidebar
Content Source	Visualforce Page
Content	The ***OrgChartPlusView Visualforce page just created.

4. Open your Chart Master page layouts and drag the new "OrgChartPlus" button to the page layout.
5. Try to open OCP from the Chart Master page. You might need to update your profile security settings.

Lightning users can have OCP embedded into a page layout, either as part of an existing tab or by dragging into a new tab:
1. Open your page layout.
2. Create a new tab called OrgChartPlus.
3. Drag your ***OrgChartPlusEmbeddedView page into the tab.