OrgChartPlus
Parameterisation Guide
Version 8.33+

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Adding the OrgChart Configuration Tab

First you will need to have access to the **OrgChartPlus Configuration** menu Tab in the Admin Users' Navigation Bar (App Menu).

⚡ **For Admins Only**

⚡ **REQUIRED**: You need to be using at least v7+ OCP

- Click on the 'App' icon (9 grey dots)
- Type "Config" in the search box
- Select '**OrgChartPlus Configuration**'
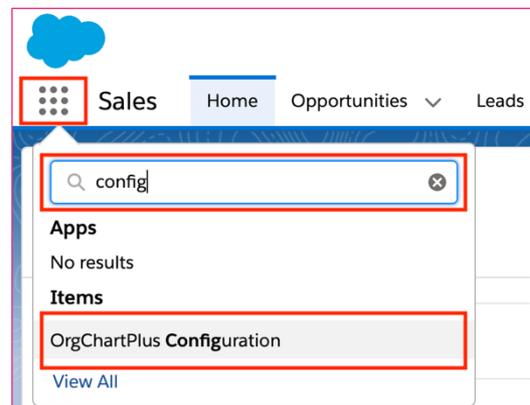
- The new Tab will appear in the right of the Nav Bar
- Click the {▼ icon} in the new '**OrgChartPlus Configuration**' Tab
- And select the {+ Add "**OrgChartPlus Configuration**" to the Nav Bar} option
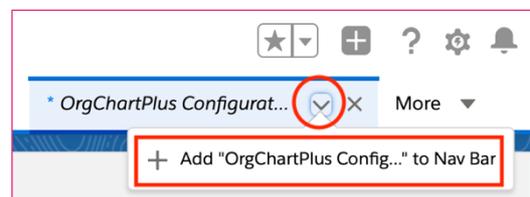
- Now the "**OrgChartPlus Configuration**" Tab will remain permanently in your Nav Bar
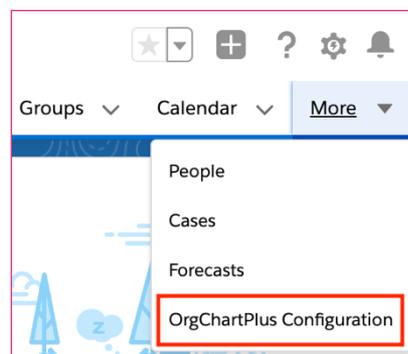
OrgChart Configuration Overview

In this manual we will use a partially customised Org to show you how to tailor the look and feel of your **OrgChartPlus** within your [**Accounts**] and [**Opportunities**].

Note: Standard configuration setup for 'Competitors', 'Team Members', and 'Templates' are covered in the OrgChartPlus Installation Instruction guide, we will not cover them here.

With the **OrgChartPlus Configuration** tool you can customise hundreds of different aspects within **OrgChartPlus**, and we will cover the most frequently used features in this manual.

OrgChartPlus is delivered with the default Parameters pre-coded in **JavaScript Object Notation** code (**JSON**). Though you *can* display all the default Parameter values in this window, we suggest that only the customised Parameters as shown here.

OrgChart Configuration Key Features

The key features of the Chart Configuration screen are …

The OrgChartPlus configuration is a set of JSON parameters. Use the Insert Parameter button to add template parameters that can then be edited.

2 Insert Field

Use this popup window to insert **Fieldnames** from a range of related Objects into your JSON code.

1 Parameters — Column [Insert]

Inserts a blank column definition

Use the Parameter Picklist to insert new JSON code…

Either a complete pre-coded standard **Parameter-Set** such as the "matrixColumns" set.

Or a single pre-formatted **Parameter-Element**, such as this new '**- Column**' for the 'Job_Group' field.

```
7
8
9
10   "matrixColumns" :
11 ▾ [
12      {"type":"icon", "dbName":"Common.Influence__c", "privacy":true},
13      {"type":"icon", "dbName":"Common.Opinion__c",   "privacy":true},
14      {"type":"text", "dbName":"Contact.Name",   "width":176},
15      {"type":"text", "dbName":"Contact.Title",  "width":176},
16      {"type":"text", "dbName":"Contact.Job_Group__c",   "width":176}
17   ],
18
19
20
21
```

A⁺ A⁻ Q Position: Ln 16 Ch 2

No syntax errors in configuration.

Fields	Type	Required	Description
label	String	No	Label of column in matrix view
type	String	Yes	Display type: icon, text, bar
rw	Boolean	No	Set to false to prevent editing
dbName	String	Yes	Object and field name. Use the Insert Field button to pick the name.
privacy	Boolean	No	True if the data should be hidden in privacy mode
colour	String	No. text only	Text colour in HTML format
align	String	No. text only	Text alignment. left, center, right
width	Integer	Yes. icon and bar only	Default column width
height	Integer	Yes. bar only	Height of percentage bar
border	String	Yes. bar only	Bar border colour in HTML format
bkFill	String	Yes. bar only	Bar background colour in HTML format
barFill	String	Yes. bar only	Bar foreground colour in HTML form

3 Check the **syntax** of the JSON code

[Check Syntax] [Save]

If the syntax is correct, you can [**Save**] the code

---

1 The {**Parameter**} picklist provides a full list of parameters that can be customised within OrgChartPlus. There are two types of Parameters…

- The **Parameter-Set**: Is the pre-saved standard code used within **OrgChartPlus**, but you can customise the code as you require.
- The **Parameter-Element**: (prefixed with '**-** ' {Hyphen}) is inserted into the 'parent' **Parameter-Set** and can also be customised as required.

2 The {**Insert Field**} popup window allows you to insert Fieldnames into your code.

Select the **Object** in the left-hand panel, then the **Fieldname** and click the [**Insert**] button.

3 Always [**Check Syntax**] after modifying the code. If the code is OK then you'll see the confirmation in green, if there are syntax errors you will see the error details in red as shown here…

Unexpected character ('"' (code 34)): was expecting comma to separate OBJECT entries at [line:32, column:2]

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OrgChart Configuration JSON Syntax

Coding is all about matching and counting brackets, quotes and commas!

Every <u>opening</u> bracket must have a matching <u>closing</u> bracket: ( ) [ ] { }
Every <u>opening</u> quote must have a matching <u>closing</u> quote: " "   ' '
And make sure the commas are in the right place, see below.
Get the 'matching count' wrong - and the syntax is wrong.

Some basic syntax rules …

Our JSON code consists of '**Parameter-Sets**' eg:
Which contain multiple '**Parameter-Elements**' eg:

```
86   "chartText" :
87   [
88        {"dbName":"Contact.Name"},
```

```
85
86   "chartText" :
87 ▾ [
88        {"dbName":"Contact.Name"},          ◀── MUST have a {Comma} if NOT the LAST Parameter-Element
89        {"dbName":"Contact.Account.Name"},  ◀──
90        {"dbName":"Contact.Title"}          ◀── NO {Comma} if the LAST Parameter-Element
91   ],                                        ◀── MUST have a {Comma} if NOT the LAST Parameter-Set
92
93   "contactPopup" :
94 ▾ [
95        {"type":"link", "dbName":"Contact.Name"},          ◀──
96        {"type":"text", "dbName":"Contact.Title"},         ◀──
97        {"type":"link", "dbName":"Contact.Account.Name"},  ◀── MUST have a {Comma} if NOT the LAST Parameter-Element
98        {"type":"text", "dbName":"Contact.Email"},         ◀──
99        {"type":"text", "dbName":"Contact.Phone"},         ◀──
100       {"type":"text", "dbName":"Contact.MobilePhone"}    ◀── NO {Comma} if the LAST Parameter-Element
101  ]                                                        ◀── NO {Comma} if the LAST Parameter-Set
102
```

Some syntax errors   (Using the "chartText" Parameter-Set above)

If the comma was <u>missing</u> from the **Parameter-Element** on **Ln89** …

Unexpected character ('{' (code 123)): was expecting comma to separate ARRAY entries at [line:90, column:3]

If there <u>was</u> a comma for the **Parameter-Element** on **Ln90** …

Unexpected character (]' (code 93)): expected a value at [line:91, column:2]

If the comma was <u>missing</u> from the **Parameter-Set** on **Ln91** …

Unexpected character ('"' (code 34)): was expecting comma to separate OBJECT entries at [line:93, column:2]

Tip: The Syntax Check always blames the next parameter for the error!

Tip: The {**Colon :**} means {**Equals =**} in JSON-speak.

Tip: If you are {**Copy/Pasting**} code into the code-box, make sure the {**DoubleQuotes**} are not 'curly' (as in MS Word or Outlook) because the syntax will fail.

Customisation Examples

The logic and code used in the following examples can be applied to both the [**Account**] and [**Opportunity**] objects.

*NOTE: This means that when you have tested the JSON code you wrote in an [**Account**] Customisation you can copy it across to the [**Opportunity**] Customisation.*

Add a text/picklist column to the Matrix View

We will add a custom picklist field called: '**Job Group**' which will look like this...

1. **App Menu: OrgChartPlus Configuration > Account Charts > Customise**

2. Check to see if the "**matrixColumns**" **Parameter-Set** is already in the JSON code.

3. If not, select {**Matrix Columns**} from the Parameter picklist and click [**Insert**].

```
17
18
19
20    "matrixColumns" :
21 ▾  [
22        {"type":"icon", "dbName":"Common.Influence__c", "privacy":true},
23        {"type":"icon", "dbName":"Common.Opinion__c",   "privacy":true},
24        {"type":"text", "dbName":"Contact.Name",    "width":176},
25        {"type":"text", "dbName":"Contact.Title",   "width":176},
26
27    ],
28
```

4. Move your cursor to the end of the last **Parameter-Element**, type a {**Comma**} and click the {**CR Return**} key to add another line to the **Parameter-Set**.

Add a text/picklist column to the Matrix View continued...

5. Select the **{- Column}** **Parameter-Element** from the **Parameter** picklist and click **[Insert]**.

6. **{Copy}** this text ⎡ `,    "width":176` ⎤ and **{Paste}** it into the new parameter below.

7. If "matrixColumns" is not the final **Parameter-Set** in the JSON code, type a **{Comma}** after the closing square bracket.

8. Place the cursor between the empty **{double quotes}** and click on the **[Insert Field]** button.

9. Select **[Contact]** in the **Object** panel, then the **Fieldname** (in this case '**Job Group**' and click the **[Insert]** button.

10. The **Fieldname** will be inserted into the code at the cursor point.

11. Click **[Check Syntax]** and if OK click **[Save]**.

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Add an Icon to the Matrix/Chart/Molecule Views

In a 6-step process we will display an icon-set that will be visible in all three Views.

We are using a custom **Formula Checkbox** field (read-only) called: '**Linkedin**' that detects whether the Contact's Linkedin URL field has been populated or not...

Matrix View   Chart View   Molecule View
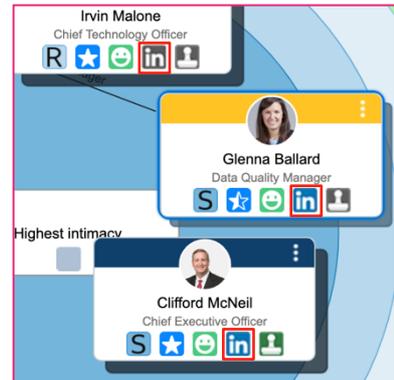
1. **Create Icons**: First we need to create icons for the two conditions of...
    True (has Linkedin URL) = [in] = Filename: **linkedin.svg**
    False (no Linkedin URL) = [in] = Filename: **linkedin_no.svg**

Icon Creation Spec & Tips

- The preferred format is **.SVG** but .PNG is also supported.
- The icons must be 20 pixels square (**20x20px**)

Tip: Ensure the image background is transparent.

Tip: SVG vector art looks good in all resolutions, especially on high-DPI screens and in exports.

Tip: If you have existing images in PNG format, do not use an online converter to make them SVG. Those just embed the PNG into the SVG. SVGs must be created as vector art.

2. **Create a Static Resource:** Next, we need to create a '**Static Resource**' in Salesforce to store these icons. The Resource content will be a **.ZIP** file called '**linkedin.zip**' (lowercase) holding the two icons we just created.

   ⚡ Setup > Custom Code > Static Resources

Static Resource **linkedin**		
Static Resource Edit		Save Cancel
Static Resource Information		
Name	linkedin	
Description		
File	Choose file linkedin.zip	
Cache Control	Public ⓘ	

   - Click **[New]**
   - Name: we suggest keeping this in lowercase and to match the name of the .ZIP file.
   - File: Select and upload the .ZIP file
   - Cache Control: Select '**Public**'. This is important.
   - Click **[Save]**

3. **"iconFiles" Parameter-Set:** Now we need to tell **OrgChartPlus** where these images are stored, so go back to the OrgChartPlusConfiguration page...
   App Menu: OrgChartPlus Configuration > Account Charts > Customise

   ```
   1   "iconFiles" :
   2 ▾ {
   3   "linkedin" : ""
   4   }
   ```

   - Check to see if the "**iconFiles**" **Parameter-Set** is already in the JSON code.
   - If not, select {Icon Zip File Alias} from the **Parameter** picklist and click [**Insert**].
   - Add a new line {CR} <u>between</u> the two {curly brackets}
   - Type in an {Alias} name to represent the Static Resource's URL for the **linkedin.zip** file, keep it the same as the Static Resource name, then type in a {Colon} and two {DoubleQuotes} ... or copy this ...

     ```
     "linkedin" : ""
     ```

   - If "**iconFiles**" is <u>not</u> the final **Parameter-Set** in the JSON code, add a {Comma} after the closing {curly bracket}

- The component parts of the **Static Resource's URL** for a Salesforce <u>Lightning</u> Org, with <u>MyDomain</u> enabled, are as follows...

Resource Directory	Static Resource
resource/	linkedin
resource/	linkedin

TIP: See the *"Icon Zip File Alias"* **Parameter-Set** syntax on **page 30**.

- In the Sandbox Org in this example, the **"IconFiles" Parameter-Set** looks like this...

```
1    "iconFiles" :
2  ▾ {
3        "linkedin" : "/resource/linkedin"
4    },
```

- Click [**Check Syntax**] and if OK click [**Save**].

4. **"matrixColumns" Parameter-Set**: To add the Icon to the **Matrix** column, scroll back down to the **"matrixColumns" Parameter-Set**.

```
19
20   "matrixColumns" :
21 ▾ [
22       {"type":"icon", "dbName":"Common.Influence__c", "privacy":true},
23       {"type":"icon", "dbName":"Common.Opinion__c",   "privacy":true},
24       {"type":"icon", "dbName":"Contact.LinkedIn__c", "privacy":true},
25       {"type":"text", "dbName":"Contact.Name",         "width":176},
26       {"type":"text", "dbName":"Contact.Title",    "width":176},
27       {"type":"text", "dbName":"Contact.Job_Group__c",     "width":176}
28   ],
29
```

- We need to add a new '**icon**' type column (not 'text') so we will {**Copy**} the existing "Common.Opinion__c" **Parameter-Element**, which is an '**icon**' type column, and insert it {**Paste**} into a new line below.
- Then change the [Contact] **Fieldname** to "Contact.Common.Linkedin__c" using the [**Insert Field**] popup screen.
- Click [**Check Syntax**] and if OK click [**Save**].

5. **"iconSets" Parameter-Set**: Now we pair the different Linkedin icon images with the different field values using the **"iconSets" Parameter-Set**.
   - Check to see if the **"iconSets" Parameter-Set** is already in the JSON code.
   - If not, select {**Icon Sets**} from the **Parameter** picklist and click [**Insert**].
   - Continued on the next page...

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Add a Checkbox Icon to the Matrix/Chart/Molecule Views continued...

```
35
36  "iconSets" :
37 ▾ [
38 ▾     {"dbName":"Common.Influence__c", "menuIcon":"res/Influence.svg", "icons":[
39         { "value":  0, "label":"None",      "icon":"",                  "shadow": 0 },
40         { "value":100, "label":"Low",       "icon":"res/InfluenceLow.svg",    "shadow": 5 },
41         { "value":200, "label":"Medium",    "icon":"res/InfluenceMedium.svg", "shadow": 8 },
42         { "value":300, "label":"High",      "icon":"res/InfluenceHigh.svg",   "shadow":10 } ] },
43 ▾     {"dbName":"Common.Opinion__c", "menuIcon":"res/Opinion.png", "icons":[
44         { "value":  0, "label":"None",      "icon":"" },
45         { "value":100, "label":"Low",       "icon":"res/OpinionLow.svg" },
46         { "value":200, "label":"Medium",    "icon":"res/OpinionMedium.svg" },
47         { "value":300, "label":"High",      "icon":"res/OpinionHigh.svg" } ] },
48 ▾     {"dbName":"special.intimacy", "menuIcon":"res/Intimacy.png", "icons":[
49         { "value":  0, "label":"None",      "icon":"" },
50         { "value":100, "label":"Target",    "icon":"res/IntimacyT.svg" },
51         { "value":200, "label":"Contact",   "icon":"res/IntimacyC.svg" },
52         { "value":300, "label":"Regular",   "icon":"res/IntimacyR.svg" },
53         { "value":400, "label":"Strong",    "icon":"res/IntimacyS.svg" } ] }
54 ]
55
```

- Now add a new **Parameter-Element...**

```
35
36  "iconSets" :
37 ▾ [
38 ▾     {"dbName":"Common.Influence__c", "menuIcon":"res/Influence.svg", "icons":[
39         { "value":  0, "label":"None",      "icon":"",                  "shadow": 0 },
40         { "value":100, "label":"Low",       "icon":"res/InfluenceLow.svg",    "shadow": 5 },
41         { "value":200, "label":"Medium",    "icon":"res/InfluenceMedium.svg", "shadow": 8 },
42         { "value":300, "label":"High",      "icon":"res/InfluenceHigh.svg",   "shadow":10 } ] },
43 ▾     {"dbName":"Common.Opinion__c", "menuIcon":"res/Opinion.svg", "icons":[
44         { "value":  0, "label":"None",      "icon":"" },
45         { "value":100, "label":"Low",       "icon":"res/OpinionLow.svg" },
46         { "value":200, "label":"Medium",    "icon":"res/OpinionMedium.svg" },
47         { "value":300, "label":"High",      "icon":"res/OpinionHigh.svg" } ] },
48 ▾     {"dbName":"special.intimacy", "menuIcon":"res/Intimacy.svg", "icons":[
49         { "value":  0, "label":"None",      "icon":"" },
50         { "value":100, "label":"Target",    "icon":"res/IntimacyT.svg" },
51         { "value":200, "label":"Contact",   "icon":"res/IntimacyC.svg" },
52         { "value":300, "label":"Regular",   "icon":"res/IntimacyR.svg" },
53         { "value":400, "label":"Strong",    "icon":"res/IntimacyS.svg" } ] },
54
55     {"dbName":"Contact.LinkedIn__c", "menuIcon":"linkedin/linkedin.svg", "icons":[
56         { "value": false, "label":"No",     "icon":"linkedin/linkedin_no.svg" },
57         { "value": true, "label":"Yes",     "icon":"linkedin/linkedin.svg"  } ] }
58
59 }
60
```

- Add a {**Comma**} after the last {**curly bracket**}
- If you were to do the next part manually using the **Parameter** picklist, you would insert an {- **Icon Set Definition**} **Element** and insert two (2) {- **Individual Icon**} **Elements** into the **Parameter-Set**. To save you time here is the JSON code...

```
{"dbName":"Contact.LinkedIn__c", "menuIcon":"linkedin/linkedin.svg", "icons":[
    {"value": false,"label":"No",     "icon":"linkedin/linkedin_no.svg"},
    {"value": true, "label":"Yes",    "icon":"linkedin/linkedin.svg"} ] }
```

Translation: This code says that the default icon for the 'Linkedin__c' field is the 'linkedin.svg' image found in the 'linkedin' **Static Resource**, *and then it pairs the {icon} to the possible {value} (False|True) and also provides text values (No|Yes) using the {label} parameter.*

- If "iconSets" is not the final **Parameter-Set** in the JSON code, type a {**Comma**} after the closing {**square bracket**}.
- Click [**Check Syntax**] and if OK click [**Save**].

6. **"chartIcons" Param**: To display the new Linkedin icon in a **Contact Box** in the Chart & Molecule Views we will add the icon to the "chartIcons" **Parameter-Set**.

    -   Check to see if the "chartIcons" **Parameter-Set** is already in the JSON code.
    -   If not, select {Org Chart Icons} from the **Parameter** picklist and click [**Insert**].

    ```
    69
    70    "chartIcons" :
    71  ▾ [
    72        {"type":"icon", "dbName":"special.intimacy",     "privacy":true},
    73        {"type":"icon", "dbName":"Common.Influence__c", "privacy":true},
    74        {"type":"icon", "dbName":"Common.Opinion__c",    "privacy":true}
    75    ],
    76
    77
    ```

    -   Now add a new **Parameter-Element...**

    ```
    69
    70    "chartIcons" :
    71  ▾ [
    72        {"type":"icon", "dbName":"special.intimacy",     "privacy":true},
    73        {"type":"icon", "dbName":"Common.Influence__c", "privacy":true},
    74        {"type":"icon", "dbName":"Common.Opinion__c",    "privacy":true},
    75        {"type":"icon", "dbName":"Contact.LinkedIn__c", "privacy":true}
    76    ]
    77
    ```

    -   {**Copy**} the existing "Common.Opinion__c" **Parameter-Element**, and {**Paste**} it into a new line below.
    -   Change the [Contact] **Fieldname** using the [**Insert Field**] popup screen.
    -   Add a {**Comma**} to the end of the "Common.Opinion__c" line.
    -   If "chartIcons" is <u>not</u> the final **Parameter-Set** in the JSON code, type a {**Comma**} after the closing {**square bracket**}.
    -   Click [**Check Syntax**] and if OK click [**Save**].

Now if you look at the [**Account**] **OrgChartPlus** screen you will see the read only Linkedin icon in the Matrix, Chart and Molecule Views.

Add an image and a field to the Contact Box

We will add a custom Rich Text field called '**Linkedin Image**' and a Picklist field called: '**Job Group**' which is visible in the Chart and Molecule Views...
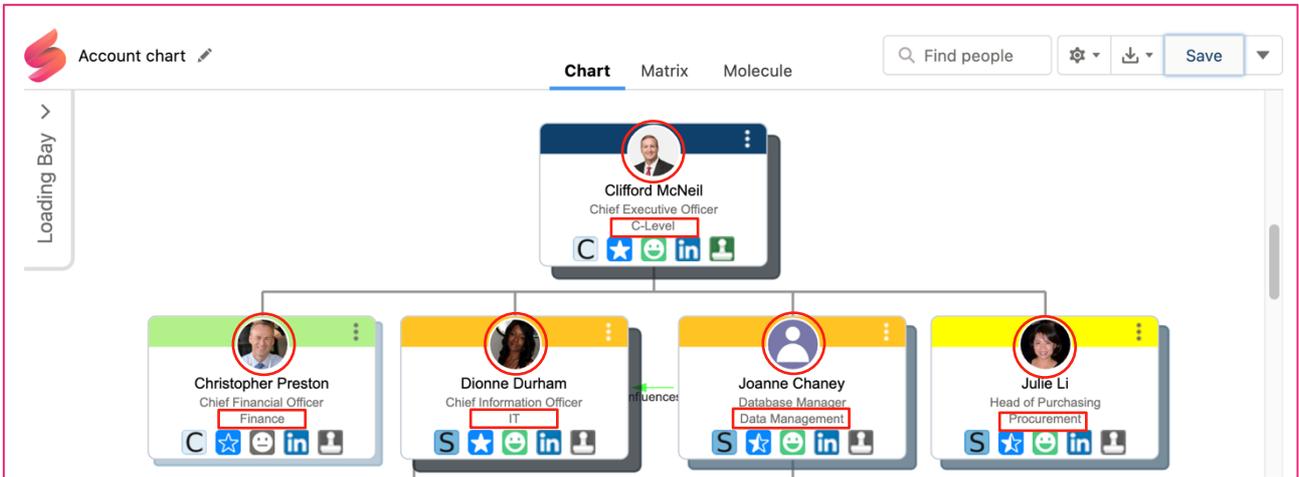
Go to the OrgChartPlusConfiguration page...
App Menu: OrgChartPlus Configuration > Account Charts > Customise

- Check to see if the "chartText" **Parameter-Set** is already in the JSON code.
- If not, select {Org Chart Text} from the **Parameter** picklist and click [**Insert**].
- Add these two **Parameter-Elements** to match the "chartText" layout below

```
{"dbName":"Contact.Linkedin_Image__c", "type":"image", "width":60, "height":60, "hidden":false},
```

```
{"dbName":"Contact.Job_Group__c", "hidden":false}
```

*Note: The '**Linkedin Image**' Rich Text field holds an <IMG> Tag that has been {copy/pasted} from Social Media. The field type and the pixel size needs to be specified in the parameters.*

```
86
87   "chartText" :
88 ▾ [
89       {"dbName":"Contact.Linkedin_Image__c", "type":"image", "width":60, "height":60, "hidden":false},
90       {"dbName":"Contact.Name", "hidden":false},
91       {"dbName":"Contact.Account.Name", "hidden":false},
92       {"dbName":"Contact.Title", "hidden":false},
93       {"dbName":"Contact.Job_Group__c", "hidden":false}
94   ],
95
```

- Check the [**Comma**] and {**Bracket**} counts to ensure the Syntax is OK.
- Click [**Check Syntax**] and if OK click [**Save**].

Add an image and a field to the Chart Popup

We will add a custom Rich Text field called '**Linkedin Image**' and a URL field called: '**Personal Linkedin**'...
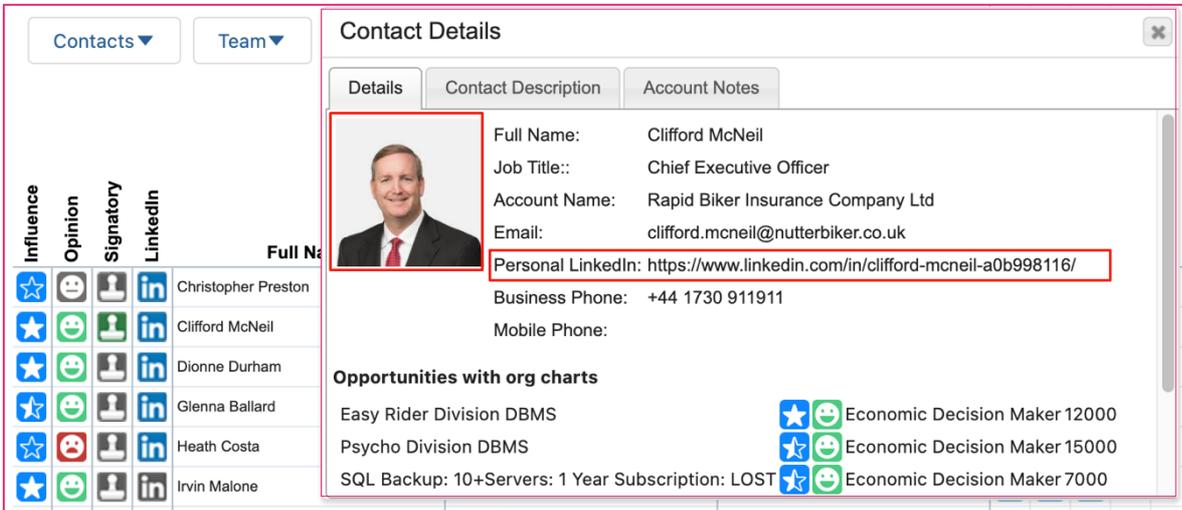
Go to the OrgChartPlusConfiguration page...
App Menu: OrgChartPlus Configuration > Account Charts > Customise

- Check to see if the "contactPopup" **Parameter-Set** is already in the JSON code.

- If not, select **{Contact Popup Fields}** from the **Parameter** picklist and click [**Insert**].

- Add these two **Parameter-Elements** to match the "contactPopup" layout below

```
{"dbName":"Contact.Linkedin_Image__c", "type":"image", "width":60, "height":60, "hidden":false},
```

```
{"type":"text","dbName":"Contact.Personal_LinkedIn__c", "linkName":"Contact.Personal_LinkedIn__c"},
```

*Note: The '**Personal Linkedin**' URL field is made 'clickable' by adding the "LinkName" parameter.*

```
 99    "contactPopup" :
100 ▾ [
101        {"dbName":"Contact.Linkedin_Image__c", "type":"image", "width":100, "height":100, "hidden":true},
102        {"type":"link", "dbName":"Contact.Name",      "linkName":"Contact.Id"},
103        {"type":"text", "dbName":"Contact.Title", "label":"Job Title:"},
104        {"type":"link", "dbName":"Contact.Account.Name",     "linkName":"Contact.Account.Id"},
105        {"type":"text", "dbName":"Contact.Email"},
106        {"type":"text", "dbName":"Contact.Personal_LinkedIn__c", "linkName":"Contact.Personal_LinkedIn__c"},
107        {"type":"text", "dbName":"Contact.Phone"},
108        {"type":"text", "dbName":"Contact.MobilePhone"}
109    ],
```

- Check the [**Comma**] and {**Bracket**} counts to ensure the Syntax is OK.

- Click [**Check Syntax**] and if OK click [**Save**].

Add colour to the Contact Box header (Manually)

So that we can quickly identify which Department a Contact is a member of, we will group them by coloured headers...

Go to the OrgChartPlusConfiguration page...
App Menu: OrgChartPlus Configuration > Account Charts > Customise

- Check to see if the "contactColours" **Parameter-Set** is already in the JSON code.
- If not, select {Contact Border List} from the **Parameter** picklist and click [Insert].
- {Copy/Paste} the example **Parameter-Elements** below to match the "contactColours" layout.
- **Note**: The 2nd swatch of colours is from the default "contactSwatches" **Parameter-Set.**


```
{"col":"#0f406b", "label":"Dept: C-Level"},
{"col":"#a12cf0", "label":"Dept: Data Management"},
{"col":"#b2f289", "label":"Dept: Finance"},
{"col":"#ffe4e1", "label":"Dept: HR"},
{"col":"#ffc425", "label":"Dept: IT"},
{"col":"#2db4b4", "label":"Dept: Legal"},
{"col":"#0078ff", "label":"Dept: Marketing"},
{"col":"#ffff01", "label":"Dept: Procurement"},
{"col":"#cae1ff", "label":"Dept: Production"},
{"col":"#eb82ee", "label":"Dept: Project Management"},
{"col":"#d0191e", "label":"Dept: Sales"},
{"col":"#638adb", "label":"Ambassador"},
{"col":"#800080", "label":"Consultant"}
```

```
114  "contactColours" :
115  [
116      {"col":"#0f406b", "label":"Dept: C-Level"},
117      {"col":"#a12cf0", "label":"Dept: Data Management"},
118      {"col":"#b2f289", "label":"Dept: Finance"},
119      {"col":"#ffe4e1", "label":"Dept: HR"},
120      {"col":"#ffc425", "label":"Dept: IT"},
121      {"col":"#2db4b4", "label":"Dept: Legal"},
122      {"col":"#0078ff", "label":"Dept: Marketing"},
123      {"col":"#ffff01", "label":"Dept: Procurement"},
124      {"col":"#cae1ff", "label":"Dept: Production"},
125      {"col":"#eb82ee", "label":"Dept: Project Management"},
126      {"col":"#d0191e", "label":"Dept: Sales"},
127      {"col":"#638adb", "label":"Ambassador"},
128      {"col":"#800080", "label":"Consultant"}
129  ],
```

- Check the [**Comma**] and {**Bracket**} counts to ensure the Syntax is OK.
- Click [**Check Syntax**] and if OK click [**Save**].

Add text and image to the Contact Box border

We will add two custom Formula Text fields which both use the standard [Contact] field 'LastActivityDate' value. The formula 'Last Contacted Status' calculates the number of days since the last activity and returns a Status which is represented as an icon (top right). The 'Last Contacted Days' formula displays those two values in text format (bottom centre)...
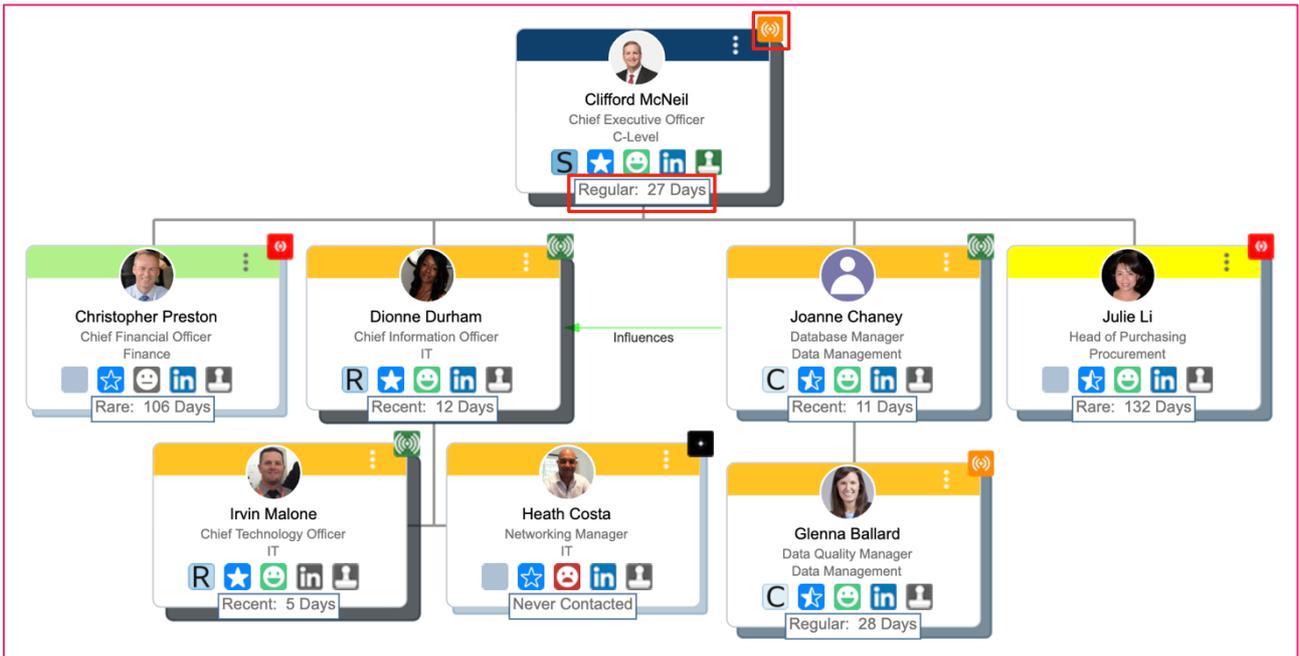
Because we are all now hardened JSON hacks, here is the code in short form...

1. Create the 20x20px .SVG icons to match the 4 statuses in the 'Last Contacted Status' formula based on the 'LastActivityDate'...
    Recent (<= 14 days)   = 🔘 = Filename: recent.svg
    Regular (<=90 days)   = 🔘 = Filename: regular.svg
    Rare (>91 days)   = 🔘 = Filename: rare.svg
    Never (IsNull)   = ⬛ = Filename: never.svg

2. Create a Static Resource named 'contact' to store the .ZIP called 'contact.zip' containing the 4 images. Remember to make the Cache = 'Public'.

3. In the "iconFiles" Parameter-Set...
    insert a new Static Resource Alias named "contact"...
    ```
    "contact" : "https://[MyDomain][--Sandbox]--orgchartplus.visualforce.com/resource/contact"
    ```

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Add text and image to the Contact Box border continued...

4. In the "iconSets" **Parameter-Set...**
    insert 1x **{- Icon Set Definition}** Parameter-Element
    insert 4x **{- Individual Icon}** Parameter-Elements ....

```
{"dbName":"Contact.Last_Contacted_Status__c", "menuIcon":"contact/recent.svg", "icons":[
        { "value": "Recent",  "label":"Recent",          "icon":"contact/recent.svg" },
        { "value": "Regular", "label":"Regular",         "icon":"contact/regular.svg" },
        { "value": "Rare",    "label":"Rare",            "icon":"contact/rare.svg" },
        { "value": "Never",   "label":"Never",           "icon":"contact/never.svg" } ]
```

5. Add a new "chartBorderItems" **{Org Chart Border Items}** **Parameter-Set...**
    insert 2x **{- Border Items}** Parameter-Elements ...

```
"chartBorderItems" : [
    { "type":"icon", "dbName":"Contact.Last_Contacted_Status__c","position":"top right"},
    { "type":"text", "dbName":"Contact.Last_Contacted_Days__c", "position":"bottom center",
"border":"#3a628b", "font":"normal 12px Arial"}
],
```

6. Check the **[Comma]** and **{Bracket}** counts to ensure the Syntax is OK.

7. Click **[Check Syntax]** and if OK click **[Save]**.

sales
methods

Adding Relationship SubTypes

The "relationshipTypes" **Parameter-Set** helps you record the interplay and relationships between the Contacts in a Chart.

We will enhance the default graphics with thick/thin, angled and dashed lines, and have also grouped and tiered the Relationships using "relationship SubTypes".
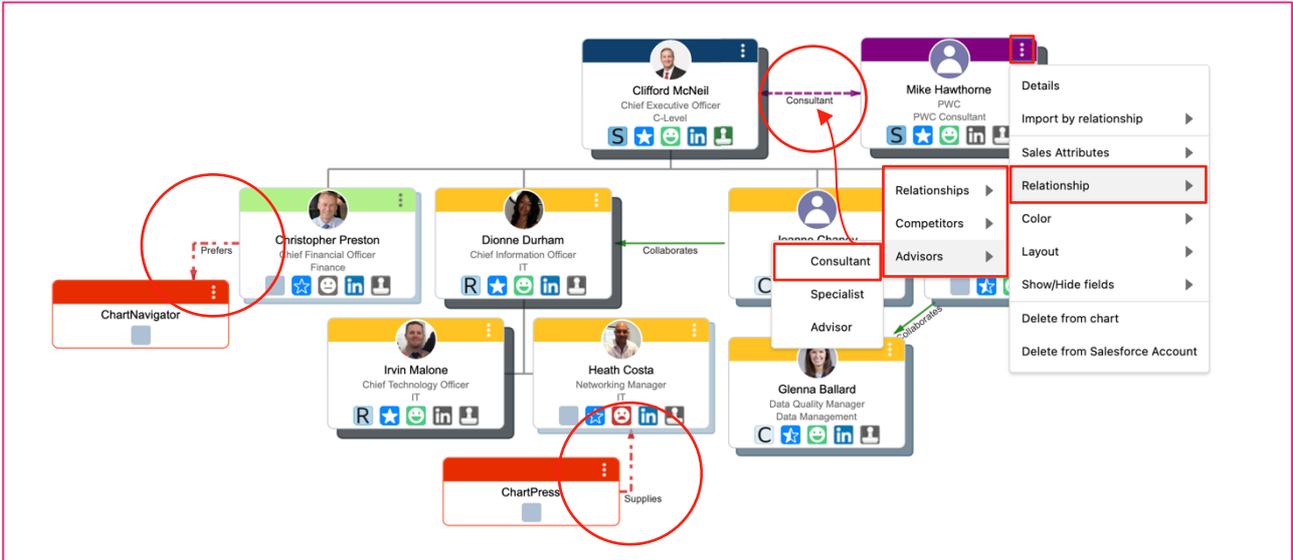
1. Check to see if the "relationshipTypes" **Parameter-Set** is already in the JSON code.
2. If not, select **{Relationship Types}** from the **Parameter** picklist and click **[Insert]**.
3. Replace the **Parameter-Elements** with the example code below…

```
"relationshipTypes":
[
    {"label":"Relationships", "values":[
        {"value":"Knows",          "label":"Knows",        "colour":"#008000", "width":2,  "arrows":2},
        {"value":"Influences",     "label":"Influences",   "colour":"#00ff00", "width":2,  "arrows":1},
        {"value":"Collaborates",   "label":"Collaborates", "colour":"#008000", "width":2,  "arrows":1},
        {"value":"Socialises",     "label":"Socialises",   "colour":"#ffaf3c", "width":2,  "arrows":2},
        {"value":"Supporter of",   "label":"Supporter of", "colour":"#00ff00", "width":2,  "arrows":1},
        {"value":"In Conflict",    "label":"In Conflict",  "colour":"#ff0000", "width":2,  "arrows":2}
        ]},
    {"label":"Competitors", "values":[
        {"value":"Supplies",       "label":"Supplies",     "colour":"#d0191e", "width":3,  "arrows":1, "dash":[8,4,4], "style":"angled"},
        {"value":"Prefers",        "label":"Prefers",      "colour":"#d0191e", "width":3,  "arrows":1, "dash":[8,4,4], "style":"angled"}
        ]},
    {"label":"Advisors", "values":[
        {"value":"Consultant",     "label":"Consultant",   "colour":"#800080", "width":3,  "arrows":2, "dash":[8,2],   "style":"angled"},
        {"value":"Specialist",     "label":"Specialist",   "colour":"#0f406b", "width":3,  "arrows":2, "dash":[8,2],   "style":"angled"},
        {"value":"Advisor",        "label":"Advisor",      "colour":"#0f406b", "width":3,  "arrows":2, "dash":[8,2],   "style":"angled"}
        ]}
],
```

4. Check the **[Comma]** and **{Bracket}** counts to ensure the Syntax is OK.
5. Click **[Check Syntax]** and if OK click **[Save]**.

sales methods

Changing display & sort order settings

The "Settings" **Parameter-Set** allows you to enable/disable up to 60 options, but the most used **Parameter-Elements** are the [Contact] and [Team] name order and sort order parameters.

- Here are the options for the [Contact] Name field...

  "contactSortOrder" : 'firstlast' : is sorted by: 'Firstname' then 'Lastname'
  "contactSortOrder" : 'lastfirst' : is sorted by: ' Lastname' then 'Firstname '

  "contactDisplayRL" : false : is displayed as: 'Firstname Lastname'
  "contactDisplayRL" : true : is displayed as: ' Lastname, Firstname '

```
"settings" :
{
    "contactSortOrder" : "firstlast",
    "contactDisplayRL" : false,
    "teamMemberSortOrder" : "firstlast",
    "teamMemberDisplayRL" : false
},
```

```
"settings" :
{
    "contactSortOrder" : "lastfirst",
    "contactDisplayRL" : true,
    "teamMemberSortOrder" : "firstlast",
    "teamMemberDisplayRL" : false
},
```

Influence	Opinion	Signatory	LinkedIn	Full Name
☆	😐	👤	in	Christopher Preston
★	😊	👤	in	Clifford McNeil
★	😊	👤	in	Dionne Durham
☆	😊	👤	in	Glenna Ballard
☆	☹	👤	in	Heath Costa
★	😊	👤	in	Irvin Malone
☆	😊	👤	in	Joanne Chaney
☆	😊	👤	in	Julie Li
★	😊	👤	in	Mike Hawthorne

Influence	Opinion	Signatory	LinkedIn	Full Name
★	😊	👤	in	Ballard, Glenna
★	😊	👤	in	Chaney, Joanne
☆	☹	👤	in	Costa, Heath
☆	😊	👤	in	Durham, Dionne
☆	😊	👤	in	Hawthorne, Mike
☆	😊	👤	in	Li, Julie
★	😊	👤	in	Malone, Irvin
★	😊	👤	in	McNeil, Clifford
☆	😐	👤	in	Preston, Christopher

- Check the [**Comma**} and {**Bracket**} counts to ensure the Syntax is OK.
- Click [**Check Syntax**] and if OK click [**Save**].

sales methods

Add colour to the Contact Box header (Dynamically)

In V7 you can dynamically colour the Contact Box header using the following techniques.

1. We use the [Contact] Picklist '**Job Group**' (**Job_Group__c**), (which we have used throughout this manual), the values are...

```
C-Level
Data Management
Finance
HR
IT
Legal
Marketing
Procurement
Production
Project Management
Sales
Ambassador
Consultant
No Group
```

2. We add a [Contact] Formula Text field '**OCP Chart Header**' (**OCP_Chart_Header__c**), which contains a CASE statement that assigns Hex #colour values against each Job Group value...

```
CASE (Job_Group__c,
"C-Level","#0f406b",
"Data Management","#a12cf0",
"Finance","#b2f289",
"HR","#ffe4e1",
"IT","#ffc425",
"Legal","#2db4b4",
"Marketing","#0078ff",
"Procurement","#ffff01",
"Production","#cae1ff",
"Project Management","#eb82ee",
"Sales","#d0191e",
"Ambassador","#638adb",
"Consultant","#800080",
"No Group","#b4b4b4",
"")
```

3. Now the magic bit, to enable all the Headers to automatically colour themselves we insert the "borderColour" **Parameter-Element** ...into the "Settings" **Parameter-Set**. The border/header colour to the value held in the "**Contact.OCP_Chart_Header__c**" field ...

```
"settings" :
{
        "borderColour" : "Contact.OCP_Chart_Header__c"
},
```

4. Then to stop the Users from changing the colours manually...
   - You completely remove the "ContactColours" **Parameter-Set**.
   - Then you 'blank' the "ContactSwatches" **Parameter-Set** as shown here...

```
"contactSwatches" : [],
```

5. Check the [**Comma**} and {**Bracket**} counts to ensure the Syntax is OK.
6. Click [**Check Syntax**] and if OK click [**Save**].

sales methods

JSON Parameter-Element Syntax

In the following pages we will describe the usage and syntax of the Parameters used within **OrgChartPlus**.

In most cases, selecting the **Parameter-Set** value and clicking [Insert] will add the default collection of **Parameter-Elements**.

One suggestion: *Prior to making any changes to JSON code, {Copy/Paste} the existing code into a text document. This will enable you to quickly return the code to the 'last working version' if you make a mistake.*

See the Parameter-Set syntax below...

Contact Colour List

Used to colour the Contact Chart Box header. The code creates a Picklist of paired colours and labels which can be selected using the {RightClick}>Colour option in Chart and Molecule Views.	*Parameter-Set*: **"contactColours" :**
	Parameter-Set Picklist: **Contact Border List**
	Parameter-Element(s): **N/A**
	Object(s): [Account] + [Opportunity]
	Views: Matrix✗ Chart✓ Molecule✓

Fields	Type	Required	Description
col	String	Yes	Colour in HTML format (Hexadecimal)
label	String	Yes	Label to display next to colour

Example Code

```
"contactColours" :
[
{"col":"#0f406b", "label":"Dept: C-Level"},
{"col":"#a12cf0", "label":"Dept: Data Management"},
{"col":"#b2f289", "label":"Dept: Finance"},
{"col":"#ffe4e1", "label":"Dept: HR"},
{"col":"#ffc425", "label":"Dept: IT"},
{"col":"#2db4b4", "label":"Dept: Legal"},
{"col":"#0078ff", "label":"Dept: Marketing"},
{"col":"#ffff01", "label":"Dept: Procurement"},
{"col":"#cae1ff", "label":"Dept: Production"},
{"col":"#eb82ee", "label":"Dept: Project Management"},
{"col":"#d0191e", "label":"Dept: Sales"},
{"col":"#638adb", "label":"Ambassador"},
{"col":"#800080", "label":"Consultant"}
],
```

Example Layout

Contact Swatches (colour box header)

Used to colour the Contact Chart Box header. The code creates an array of colours which can be selected using the {RightClick}>Colour option in Chart and Molecule Views.	*Parameter-Set*: **"contactSwatches" :**
	Parameter-Set Picklist: **Contact Border Swatches**
	Parameter-Element(s): **N/A**
	Object(s): [Account] + [Opportunity]
	Views: Matrix✘ Chart✓ Molecule✓

Fields	Type	Required	Description
Array [ ]	Array	Yes	Array of arrays containing colours in HTML format (Hexadecimal)

Default Code

```
"contactSwatches" :
[
        ["#000000", "#484848", "#b4b4b4", "#b1c6ec", "#638adb", "#2c65ce"],
        ["#0201ff", "#3336f1", "#9093ea", "#9e9fd9", "#3d3db3", "#00009b"],
        ["#663098", "#8b62b5", "#c5b2d9", "#c285eb", "#a12cf0", "#9a00ff"],
        ["#ff00ff", "#ed31f3", "#eb82ee", "#da9ec6", "#b53e8c", "#9a0064"],
        ["#00ffff", "#6fe5e3", "#bceceb", "#9dc4c6", "#3a8b8c", "#006666"],
        ["#00ff01", "#45f444", "#aef3ad", "#b4c5b2", "#648b64", "#316631"],
        ["#fd0000", "#ff4b4f", "#ffbdbf", "#e59395", "#b63e41", "#990000"],
        ["#ff9001", "#e3881d", "#e6c092", "#c8b29c", "#8d653e", "#683200"],
        ["#ffff01", "#dcdb3c", "#ebeab5", "#d9d9a3", "#b1b438", "#9f9c00"]
],
```

Default Layout

Contact Import Columns

Defines the fields you see when you Import Contacts into the Chart. Contact Import is accessible in Matrix and Chart Views.	*Parameter-Set*: **"importContacts" :** *Parameter-Set Picklist*: **Contact Import Columns** *Parameter-Element(s)*: **- Column** *Object(s)*: [Account] + [Opportunity] *Views*: Matrix✓ Chart✓ Molecule✗

Fields	Type	Required	Description
label	String	No	Label used in column header
type	String	Yes	Display type: icon, text, bar
dbName	String	Yes	Object and field name. Use the Insert Field button to pick the name.
colour	String	No. text only	Text colour in HTML format
align	String	No. text only	Text alignment. left, center, right
width	Integer	Yes. icon and bar only	Default column width
minWidth	Integer	No	Minimum column width
height	Integer	Yes. bar only	Height of percentage bar
border	String	Yes. bar only	Bar border colour in HTML format
bkFill	String	Yes. bar only	Bar background colour in HTML format
barFill	String	Yes. bar only	Bar foreground colour in HTML format
font	String	No. text only	Font in HTML format

Example Code

NOTE: *Replace the highlighted custom fields in this code with 'real fields' from your own Org or remove them.*

```
"importContacts" :
[
        {"label":"Contact", "type":"text", "dbName":"Contact.Name"},
        {"label":"Job Title", "type":"text", "dbName":"Contact.Title"},
        {"label":"Account", "type":"text", "dbName":"Contact.Account.Name"},
        {"label":"Department", "type":"text", "dbName":"Contact.Job_Group__c"}
],
```

Example Layout

Contact Popup Fields

Defines the fields you see in the Contact Popup Window when you {double-click} on a Contact box in Chart & Molecule View or on a Contact Line in Matrix View.	

Parameter-Set:	**"contactPopup" :**	
Parameter-Set Picklist:	**Contact Popup Fields**	
Parameter-Element(s):	**- Popup Field**	
Object(s):	[Account] + [Opportunity]	
Views:	Matrix✓ Chart✓ Molecule✓	

Fields	Type	Required	Description
label	String	No	Label used in selection menus
type	String	Yes	Display type: text, image
dbName	String	Yes	Object and field name. Use the Insert Field button to pick the name.
linkName	String	No	For anchor text this is the object and field name containing the URL. Use the Insert Field button to pick the name.
linkURL	String	No. anchor only	Link destination
File	Boolean	No	Lightning
Attachment	Boolean	No	Classic
FileName	String	No	Just the name of the File / Attachment
width	Integer	No. image only	Width of image
height	Integer	No. image only	Height of image

Example Code

NOTE: *Replace the highlighted custom fields in this code with 'real fields' from your own Org or remove them.*

```
"contactPopup" :
[
    {"dbName":"Contact.Linkedin_Image__c", "type":"image", "width":100, "height":100, "hidden":true},
    {"type":"link",   "dbName":"Contact.Name",    "linkName":"Contact.Id"},
    {"type":"text",   "dbName":"Contact.Title", "label":"Job Title:"},
    {"type":"link", "dbName":"Contact.Account.Name",    "linkName":"Contact.Account.Id"},
    {"type":"text",   "dbName":"Contact.Email"},
    {"type":"text"    "dbName":"Contact.Personal_LinkedIn__c",
"linkName":"Contact.Personal_LinkedIn__c"},
    {"type":"text",   "dbName":"Contact.Phone"},
    {"type":"text",   "dbName":"Contact.MobilePhone"}
],
```

Example Layout

Customise Activities

Parameter-Set:	**"Settings" :**
Parameter-Set Picklist:	**General Settings**
Parameter-Element(s):	**[Code Manually]**
Object(s):	[Account] + [Opportunity]
Views:	Matrix✓ Chart✓ Molecule✓

DISABLE ACTIVITIES IN OrgChartPlus	*Example Code*

OCP supports adding Tasks, Events, and Calls from within the tool. These are enabled by default but can be disabled with one or more of the following settings.	```
	"settings" :
	{
	        "disableNewTask" : true,
	        "disableNewEvent" : true
	        "disableLogACall" : true,
	},
	``

USE CUSTOM ACTIVITY FIELDS	*Example Code*

The list of fields in the forms will default to the standard fields used by Salesforce. If you have customised your activity fields, you can reflect those changes in OCP by specifying the fields using "newTaskFields", "newEventFields", or "newCallFields": These are specified as a list of fields with one field per row, or as an array of fields with up to two fields per row.	```
	"settings" :
	{
	        "newTaskFields": [
	            "Subject",
	                ["ActivityDate", "OwnerId"],
	                ["WhoId", "WhatId"],
	                "Status"
	        ],
	},
	``

DEFAULT & NEW ACTIVITY DEFAULTS	<mark>New Activity</mark> *Example Code*

You can change the default activity fields to custom values using "newTaskDefaults", "newEventDefaults", or "newCallDefaults". Each associates a field with a fixed value or a formula.	```
	"settings" : {
	        "newTaskDefaults" :{
	        OwnerId: 'User.Id',
	        WhoId: 'Contact.Id',
	        WhatId: 'Master.Id'
	                }
	},
	``

	<mark>Default Activity</mark> *Example Code*

	``
	"settings" :
	{
	        "newTaskDefaults" : {
	        OwnerId: 'null'
	                }
	},
	``

DISABLE ACTIVITY TAB ON CONTACT POPUP	*Example Code*

The Contacts Details popup includes an "Activity Tab". Basic activity details are shown, listed in date order. You can disable this if you wish.	```
	"settings" : {
	        "disableCDActivities" : true
	        },
	``

CONFIGURE TASK/EVENT QUERIES	*Example Code*

The task and event queries can be configured with "contactPopupTaskQuery" and "contactPopupEventQuery", with each query field being associated with a formula expression that returns the value for the field.	```
	"settings" : {
	        "disableCDActivities" : true
	        },
	``

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Customise Activities, cont'd

Parameter-Set:	**" contactPopupEventQuery" :**
Parameter-Element(s):	**[Code Manually]**
Object(s):	[Account] + [Opportunity]
Views:	Matrix✓ Chart✓ Molecule✓

Example Code

```
"contactPopupEventQuery":
        {
                "WhoId": 'Contact.Id',
                "WhatId": 'Master.Id'
        }
```

Parameter-Set:	**"contactPopupTaskQuery" :**
Parameter-Element(s):	**[Code Manually]**
Object(s):	[Account] + [Opportunity]
Views:	Matrix✓ Chart✓ Molecule✓

Example Code

```
"contactPopupTaskQuery":
        {
                "WhoId": 'Contact.Id',
                "WhatId": 'Master.Id'
        }
```

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methods

General Settings

A wide selection of Settings to alter the behaviour and look of OrgChartPlus. Each Parameter-Element will need to be entered manually.	*Parameter-Set*: **"Settings" :** *Parameter-Set Picklist*: **General Settings** *Parameter-Element(s)*: **[Code Manually]** *Object(s)*: [Account] + [Opportunity] *Views*: Matrix✓ Chart✓ Molecule✓

Example Code

```
"settings" :
{
        "contactSortOrder" : "lastfirst",
        "contactDisplayRL" : true
},
```

Example Layout

Fields	Type	Required	Description
abbreviateExport	Boolean	No	Abbreviate text when exporting. yes (default), no, or never
abbreviateMatrix	String	No	Abbreviate text in the matrix view. yes (default), no, or never
abbreviateMolecule	Boolean	No	Abbreviate text in the molecule view. yes (default), no, or never
abbreviateOrgChart	String	No	Abbreviate text in the org chart view. yes (default), no, or never
abbreviatePrint	Boolean	No	Abbreviate text when printing. yes (default), no, or never
abbreviateSocial	Boolean	No	Abbreviate text in the social view. yes (default), no, or never
alternateManager	Object	No	Contact alternative manager field definition
attribsOrder	Array	No	Order of attributes menus. List of dbName values
automaticOCLayout	Array	No	Org chart automatic layout rules. Array of objects.
borderColour	String	No	Field that specifies the border colour
borderColourPrivacy	Boolean	No	Make border colours disappear when in privacy mode.
contactFilterUsage	String	No	Specifies whether the import filter (contactImportFilter) is used on the import form, when loading the chart, or both. Can be "import" (or null by default), "load", or "both".

contactImportFilter	String	No	SOQL filter applied to contact queries
contactDisplayRL	Boolean	No	Show lastname first, then firstname
contactOnChartField	String	No	Used to track when contacts are added to a chart. OCP will set the specified checkbox field to 'true'. Example: "Contact.OnChart__c"
contactNotes	Array	No	List of fields that provice the contact notes
contactSortOrder	String	No	Sort by "firstlast" or "lastfirst"
defaultChartName	String	No	Default name for new charts
defaultChartType	String	No	Used to override the default chart type. One of "auto" (default), "reportsto", or "decision".
defaultFocus	String	No	Set the default "focus" selection. Can be "first", "highest", or "user" (default)
defaultSelectChart	String	No	Default tab on new/open chart. Can be "auto", "manualopen", "opentab", or "createtab"
disableAttachments	Boolean	No	Disable the Export Attachment feature
disableCDDescription	Boolean	No	Disable the contact description field
disableCDNotes	Boolean	No	Disable the per-account/per-opportunity contact notes
disableCompetitors	Boolean	No	Prevent the importing and display of Competitors
disableContactDeletion	Boolean	No	Disable the Delete Contact From Salesforce feature
disableDecisionChart	Boolean	No	Disable option to create decision charts
disableDefaultImportAccs	Boolean	No	Disable automatic import accounts for new chart
disableDefaultImportExternal	Boolean	No	Disable automatic import external contacts for new chart
disableDefaultImportOpps	Boolean	No	Disable automatic import opportunities for new chart
disableDefaultImportTeam	Boolean	No	Disable automatic import team for new chart
disableExport	Boolean	No	Disable the Export File feature
disableExportDOCX	Boolean	No	Set to true to prevent exporting to DOCX.
disableExportPPTX	Boolean	No	Set to true to prevent exporting to PPTX.
disableExportURL	Boolean	No	Disable the Export To URL feature
disableExportXLSX	Boolean	No	Set to true to prevent exporting to XLSX
disableImportByRelationship	Boolean	No	Disable the option to import contacts by ReportsTo relationship.
disableImportExternal	Boolean	No	Disable option to import external contacts for new chart
disableImportFormClose	Boolean	No	Prevent the Import Contact form Add button from closing the form
disableLegend	Boolean	No	Do not display a legend when printing
disableLocalTemplates	Boolean	No	Prevent users from specifying local export template files.
disableMatrix	Boolean	No	Remove the Matrix view.
disableMolecule	Boolean	No	Hide the Molecule view
disableNewEvent	Boolean	No	Disable the New Event action in the Contact menu
disableNewTask	Boolean	No	Disable the New Task action in the Contact menu
disableOCFieldHiding	Boolean	No	Prevent the user from hiding fields on the org chart view
disableOrgChart	Boolean	No	Remove the Chart view.
disablePartners	Boolean	No	Prevent the importing and display of Partners
disablePlaceholderImage	Boolean	No	Remove the contact image from the placeholder box.
disablePrint	Boolean	No	Disable the Chart Print feature
disableRelationshipLineText	Boolean	No	Do not display names on relationship lines
disableReportsToChart	Boolean	No	Disable option to create report-to charts
disableSaveAsDestination	Boolean	No	Do not charts to be copied to other objects

disableServerTemplates	Boolean	No	Prevent users from specifying centrally defined export template files.
disableTeamMembers	Boolean	No	Prevent the importing and display of Team Members
disableTeamMembersOnChart	Boolean	No	Prevent team members from being shown on the org chart
enableMatrixLargeIcons	Boolean	No	Allow icons greater than 16x16 in the matrix
exportQuality	Numeric	No	Default export image quality. Defaults to 1
matrixColumn Width	Numeric	No	Overrides the calculated width of the horizontal divider on the Matrix view.
maxAttribColumns	Numeric	No	Maximum number of columns in the attributes menu. Default is 2
maxContactBoxWidth	Numeric	No	Maximum text width before the text is wrapped. Default is 200
newContactParams	Object	No	Specifies the default field values to be set when creating a new contact. Example: {"accid__c":"Master.Id."
newTaskDefaults	Object	No	Specifies the default field values to be set when creating a new task. Example: {"OwnerId":"null"}
newTaskFields	Array	No	Specifies the field layout to be used when creating a new task. Each item can be a single field or an array of two fields. Example: ["Subject", ["ActivityDate", "OwnerId"], ["WhoId", "WhatId"], "Status"]
newTaskOverrides	Object	No	Overrides schema settings on the New Task form. Example: { "Subject": {"label":"Test", "rw":0, "mandatory":1} }
newEventDefaults	Object	No	Specifies the default field values to be set when creating a new event. Example: { "OwnerId":"null" }
newEventFields	Array	No	Specifies the field layout to be used when creating anew event. Each item can be a single field or an array of two fields. Example: ["Subject", ["ActivityDate", "OwnerId"], ["WhoId", "WhatId"], "Status"]
newEventOverrides	Object	No	Overrides schema settings on the New Event form. Example: { "Subject": {"label":"Test", "rw":0, "mandatory":1} }
noteDefaultColour	Text	No	Set the default color when creating a new note. Example: "#2c65ce"
primaryContact	String	No	Name of the primary contact field. Used to highlight the contact in the matrix view
roleDeleteRule	Text	No	A Boolean formula rule that specifies when OCP should automatically delete the contact role record. Example: "Role.BuyerRole__c=null"
showIntimacyLines	Boolean	No	Set to render intimacy lines between contacts and team members on the org chart
showTeamMembersByDefault	Boolean	No	New team members are shown on the org chart by default
soslObjects	Array	No	List of object API names to enable for SOSL querying. Example: ["Account", "Contact"]
TeamMemberDisplayRL	Boolean	No	Show lastname first, then firstname
TeamMemberSortOrder	String	No	Sort by "firstlast" or "lastfirst"
xlsxMatrixFreezeColumn	Text	No	Specify a field to freeze in the XLSX export. Example: "Contact.FirstName"
xlsxMatrixFreezeRows	Boolean	No	Set to true to freeze the upper two rows in the XLSX export.

Advanced Team Member Import

Defines method used to Import Team Members into the Chart. Team Member Import is accessible in Matrix, Chart, and Molecule Views. Contact us for help at support@salesmethods.com.	*Parameter-Set*: **"teamSource" :** *Parameter-Set Picklist*: - *Parameter-Element(s)*: **-** *Object(s):* [Account] + [Opportunity] *Views:* Matrix✓ Chart✓ Molecule✓

Fields	Type	Required	Description
label	String	Yes	Label used in column header
type	String	Yes	Display type: icon, text, bar
dbName	String	Yes	Object and field name. Use the Insert Field button to pick the name.

Icon Zip File Alias

This **{Alias}** is used to represent the Static Resource's URL for a **.zip** icon set. The Alias is used in the iconSets Parameter. *See the coding example on **pages 10 & 11***	*Parameter-Set*: **"iconFiles" :** *Parameter-Set Picklist*: **Icon Zip File Alias** *Parameter-Element(s)*: **[Code Manually]** *Object(s)*: [Account] + [Opportunity] *Views*: Matrix✓ Chart✓ Molecule✓

Fields	Type	Required	Description
alias	String	Yes	Shortname of the Static Resource
Static Resource URL	String	Yes	Lighting URL of the Static Resource .Zip file

Example Code

```
"iconFiles" :
{
  "linkedin" : "/resource/linkedin",
  "signatory" : "/resource/signatory"}
},
```

About the Static Resource URL

The component parts of the **Static Resource's URL** for a Salesforce Lightning Org, with MyDomain enabled, are as follows…

Resource Directory	Static Resource
resource/	linkedin
resource/	linkedin

sales methods

Icon Sets

Pairs the Icons with the Values for each Image based field. The default icon sets for Influence, Opinion and Intimacy can be added and then modified and extended in this manner.

See the coding example on **page 12**

Parameter-Set:	**"iconSets" :**	
Parameter-Set Picklist:	Icon Sets	
Parameter-Element(s):	- Icon sets definition	
	- Icon set definition	
	- Individual icon	
Object(s):	[Account] + [Opportunity]	
Views:	Matrix✓ Chart✓ Molecule✓	

Fields	Type	Required	Description
- icon sets definition			
iconSets	Array	Yes	An array of icon set definitions
- icon set definition			
dbName	String	Yes	Object and field name. Use the Insert Field button to pick the name.
menuIcon	String	Yes	16x16 image to use on menus. A relative link to OCPs icons or a full link to a custom icon.
icons	Array	No	An array of icon definitions
- individual icon			
value	Numeric	Yes	Icon is shown if the database value is less or equal this value
label	String	No	Label to show in selection menus
icon	String	Yes	16x16 image to use in menus, the matrix, and org chart. A relative link (using an **Alias**) to OCPs icons or a full link to a custom icon.
shadow	Numeric	Yes. Influence only	Size of influence shadow in pixels
x8	Boolean	No	Indicates that a x8 hi-res icon is available

Default + Custom Code

NOTE: *Replace the highlighted custom fields in this code with 'real fields' from your own Org or remove them.*

```
"iconSets" :
[
    {"dbName":"Common.Influence__c", "menuIcon":"res/Influence.svg", "icons":[
        { "value":  0, "label":"None",  "icon":"",                          "shadow": 0 },
        { "value":100, "label":"Low",    "icon":"res/InfluenceLow.svg",      "shadow": 5 },
        { "value":200, "label":"Medium","icon":"res/InfluenceMedium.svg",    "shadow": 8 },
        { "value":300, "label":"High",  "icon":"res/InfluenceHigh.svg",      "shadow":10 } ] },

    {"dbName":"Common.Opinion__c", "menuIcon":"res/Opinion.svg", "icons":[
        { "value":  0, "label":"None",  "icon":"" },
        { "value":100, "label":"Low",    "icon":"res/OpinionLow.svg" },
        { "value":200, "label":"Medium","icon":"res/OpinionMedium.svg" },
        { "value":300, "label":"High",  "icon":"res/OpinionHigh.svg" } ] },

    {"dbName":"special.intimacy", "menuIcon":"res/Intimacy.svg", "icons":[
        { "value":  0, "label":"None",  "icon":"" },
        { "value":100, "label":"Target","icon":"res/IntimacyT.svg" },
        { "value":200, "label":"Contact","icon":"res/IntimacyC.svg" },
        { "value":300, "label":"Regular","icon":"res/IntimacyR.svg" },
        { "value":400, "label":"Strong","icon":"res/IntimacyS.svg" } ] },

    {"dbName":"Contact.LinkedIn__c", "menuIcon":"linkedin/linkedin.svg", "icons":[
        { "value": false, "label":"No", "icon":"linkedin/linkedin_no.svg" },
        { "value": true, "label":"Yes", "icon":"linkedin/linkedin.svg" } ] },

     {"dbName":"Common.SignatoryYN__c", "menuIcon":"signatory/signatory.svg", "icons":[
        { "value": false, "label":"No", "icon":"signatory/signatory_no.svg" },
        { "value": true, "label":"Yes", "icon":"signatory/signatory.svg" } ] },
],
```

Involvements

Involvements generate Related Lists within the Contact Popup Window, such as Opportunities.	*Parameter-Set*: **"involvements" :** *Parameter-Set Picklist*: **Involvements** *Parameter-Element(s)*: **- Involvement Entry** *Object(s):* [Account] + [Opportunity] *Views:* Matrix✓ Chart✓ Molecule✓

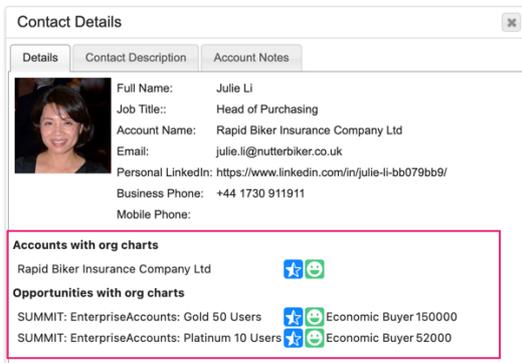| Fields	Type	Required	Description
label	String	Yes	Label for display in contact details popup
contactRoleRel	String	Yes	Lookup field to Role object on Contact object
contactCommonRel	String	Yes	Relationship name of field on Contact object that links to EntityCommon
roleObjName	String	No	Role object name
roleMasterId	String	No	Field name on Role that links to the common master object
commonObjName	String	Yes	EntityCommon object
commonMasterId	String	Yes	Field name on EntityCommon that links to the common master object
fields	Array	Yes	List of fields can include "Common", "Role". The master id and name must come first
label	String	Yes	Label for display in contact details popup

Default + Custom Code

NOTE: If you do **not** have "**Contacts to Multiple Accounts**" enabled in your Org, remove the code in red.
TIP: Add the code in green to show the Opportunity value

```
"involvements" :
[
{            "label" :                              "Accounts with org charts",
             "contactRoleRel" :            "AccountContactRelations",
             "contactCommonRel" :     "ADP_OrgChartEntityCommon__r",
             "roleObjName" :              "AccountContactRelation",
             "roleMasterId" :             "AccountId",
             "commonObjName" :           "ADP_OrgChartEntityCommon__c",
             "commonMasterId" :          "Account__c",
             "fields" :                          ["Common.Account__r.Id",
"Common.Account__r.Name", "Common.Influence__c", "Common.Opinion__c", "Role.Roles"]},
{            "label" :                              "Opportunities with org charts",
             "contactRoleRel" :            "OpportunityContactRoles",
             "contactCommonRel" :     "MSO_OrgChartEntityCommon__r",
             "roleObjName" :              "OpportunityContactRole",
             "roleMasterId" :             "OpportunityId",
             "commonObjName" :           "MSO_OrgChart2EntityCommon__c",
             "commonMasterId" :          "Opportunity__c",
             "fields" :                          ["Common.Opportunity__r.Id",
"Common.Opportunity__r.Name", "Common.Influence__c", "Common.Opinion__c", "Role.Role",
"Common.Opportunity__r.Amount"]}
],
```

Example Layout

Matrix Columns

Defines the columns and their labels in the Matrix view. Column types can be either icon, text or bar.	*Parameter-Set*: **"matrixColumns" :** *Parameter-Set Picklist*: **Matrix Columns** *Parameter-Element(s)*: **- Column** *Object(s)*: [Account] + [Opportunity] *Views*: Matrix✓ Chart✗ Molecule✗

Fields	Type	Required	Description
align	String	No. text only	Text alignment. left, center, right
barFill	String	Yes. bar only	Bar foreground colour in HTML format
bkFill	String	Yes. bar only	Bar background colour in HTML format
border	String	Yes. bar only	Bar border colour in HTML format
colour	String	No. text only	Text colour in HTML format
dbName	String	Yes	Object and field name. Use the Insert Field button to pick the name.
Freeze	Boolean	No	Set to true on one column to freeze that and the columns to the left.
height	Integer	Yes. bar only	Height of percentage bar
Hidden	Boolean	No	Set to true to mark the column as hidden by default.
label	String	No	Label of column in matrix view
privacy	Boolean	No	True if the data should be hidden in privacy mode
rw	Boolean	No	Set to false to prevent editing
type	String	Yes	Display type: icon, text, bar
width	Integer	Yes. icon and bar only	Default column width

Example Code

NOTE: *Replace the highlighted custom fields in this code with 'real fields' from your own Org or remove them.*

TIP: *This is the most effective way to rename/shorten a Column's Label. See how the 'Job Group' column was renamed as 'Department'.*

```
"matrixColumns" :
[
    {"label":"Influence", "type":"icon", "dbName":"Common.Influence__c",  "privacy":true},
    {"label":"Opinion", "type":"icon", "dbName":"Common.Opinion__c",      "privacy":true},
    {"label":"Signatory", "type":"icon", "dbName":"Common.SignatoryYN__c", "privacy":true},
    {"label":"LinkedIn", "type":"icon", "dbName":"Contact.LinkedIn__c",    "privacy":true},
    {"label":"Contact", "type":"text", "dbName":"Contact.Name",  "width":176},
    {"label":"Job Title", "type":"text", "dbName":"Contact.Title",        "width":176},
    {"label":"Department", "type":"text", "dbName":"Contact.Job_Group__c", "width":176}
],
```

Example Layout

Molecule Intimacy

Defines the circle sizes and colours in the Molecule view, as well as the Contact Box spacing.	*Parameter-Set:* **"moleculeDist" :** *Parameter-Set Picklist:* Molecule Intimacy *Parameter-Element(s):* - Circle Definition *Object(s):* [Account] + [Opportunity] *Views:* Matrix ✗ Chart ✗ Molecule ✓

Fields	Type	Required	Description
Molecule Intimacy			
dbName	String	Yes	Object and field name. Use the Insert Field button to pick the name and determine the Value.
privacy	Boolean	No	True if the data should be hidden in privacy mode
circles	Array	Yes	Array of intimacy circle definitions
- Circle Definition			
value	Numeric	Yes	This circle is shown if the database value is less or equal this value
radius	Integer	Yes	Circle diameter on molecule view in pixels
dist	Integer	Yes	The distance between the Contact Boxes in pixels.
line	String	Yes	Colour of circle perimeter in HTML format
fill	String	Yes	Colour of circle background in HTML format

Example Code

```
"moleculeDist" :
{
"dbName":"special.intimacy",    "privacy":true, "circles":[
        {"value":  0, "radius":500, "dist":500, "line":"", "fill":""},
        {"value":100, "radius":450, "dist":450, "line":"#FFDFD3", "fill":"#FFDFD3"},
        {"value":200, "radius":350, "dist":350, "line":"#FEC8D8", "fill":"#FEC8D8"},
        {"value":300, "radius":250, "dist":250, "line":"#D291BC", "fill":"#D291BC"},
        {"value":400, "radius":150, "dist":150, "line":"#957DAD", "fill":"#957DAD"} ]
},
```

Example Layout
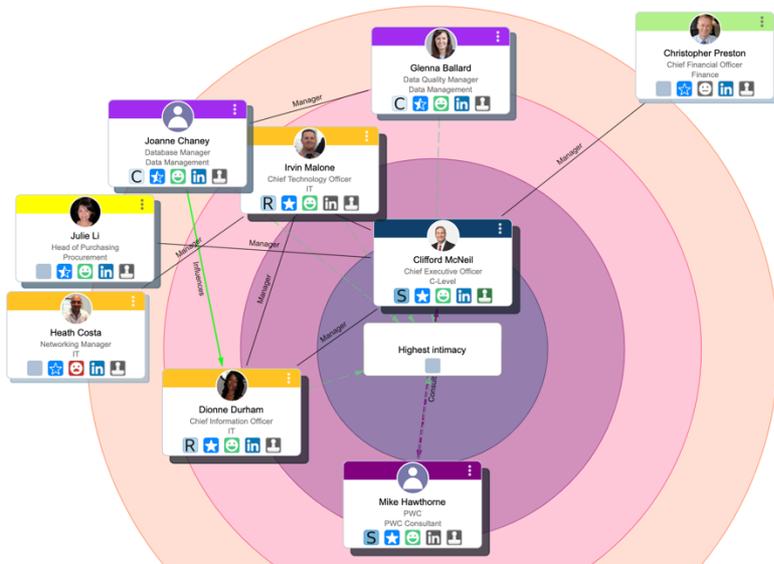
Open Chart Columns

Defines the column content and width in the Open Chart Window popup.	*Parameter-Set*: **"chartColumns" :**
	Parameter-Set Picklist: **Open Chart Columns**
	Parameter-Element(s): **- Column**
	Object(s): [Account] + [Opportunity]
	Views: Matrix✓ Chart✓ Molecule✖

Fields	Type	Required	Description
align	String	No. text only	Text alignment. left, center, right
barFill	String	Yes. bar only	Bar foreground colour in HTML format
bkFill	String	Yes. bar only	Bar background colour in HTML format
border	String	Yes. bar only	Bar border colour in HTML format
colour	String	No. text only	Text colour in HTML format
dbName	String	Yes	Object and field name. Use the Insert Field button to pick the name.
font	String	No. text only	Font in HTML format
format	Text	No	Date or Date/Tie formatting string. See "Date and Datetime Fomats" in the Salesforce help.
formula	Text	No	A formula that is used to calculate a value or build a text string rather than just use a field value. Can be used to apply formatting to a value.
height	Integer	Yes. bar only	Height of percentage bar
label	String	No	Label used in column header
minWidth	Integer	No	Minimum column width
rw	Boolean	No	Override the read-only field state
type	String	Yes	Display type: icon, text, bar
width	Integer	Yes. icon and bar only	Default column width

Default + Custom Code

NOTE: The code in red has been modified/added to enhance the column content.

```
"chartColumns" :
[
    {"label":"Chart name",  "type":"text",  "rw":true,   "dbName":"Chart.Name",  "minWidth":140},
    {"label":"Reports-to",  "type":"text",  "rw":false,  "dbName":"Chart.AutomaticChart__c"},
    {"label":"Version"      "type":"text",  "rw":false,  "dbName":"Chart.OrgChartPlus__Version__c"}
],
```

Example Layout

Org Chart Border Items

Allows you to add text boxes and icons to the borders of the Contact Chart Box.	*Parameter-Set*: **"chartBorderItems" :** *Parameter-Set Picklist*: Org Chart Border Items *Parameter-Element(s)*: - Border Item *Object(s)*: [Account] + [Opportunity] *Views*: Matrix✘ Chart✓ Molecule✓

Fields	*Type*	*Required*	*Description*
border	String	No	Border colour to apply (text only)
dbName	String	Yes	Object and field name. Use the Insert Field button to pick the name.
font	String	No	Font to apply (text only)
Format	Text	No	Date or Date/Time formatting string. See "Date and Datetime Formats" in the Salesforce help.
Formula	Text	No	A formula field is used to calculate a value or build a text string rather than just use a field value. Can be used to apply formatting to a value.
hidden	Boolean	No	True to hide the text by default
label	String	No	Label used in selection menus
position	String	Yes	Position relative to border. Must contain "top", "middle", or "bottom" and "left", "center", or "right". Offsets can be specified in the form "top-10 left+5"
privacy	Boolean	No	True if the data should be hidden in privacy mode
type	String	Yes	Item type "icon" or "text"

Example Code
NOTE: *Replace the highlighted custom fields in this code with 'real fields' from your own Org or remove them.*
TIP: *See the step-by-step Example on how to add Border Items on* **pages 17 & 18** *above*

```
"chartBorderItems" : [
    { "type":"icon", "dbName":"Contact.Last_Contacted_Status__c","position":"top right"},
    { "type":"text", "dbName":"Contact.Last_Contacted_Days__c", "position":"bottom center",
"border":"#3a628b", "font":"normal 12px Arial"}
],
```

Example Layout

Org Chart Icons

Allows you to add icons to the Contact Chart Box.	*Parameter-Set:*	**"chartIcons" :**
	Parameter-Set Picklist:	Org Chart Icons
	Parameter-Element(s):	- Icon
	Object(s):	[Account] + [Opportunity]
	Views:	Matrix ✖ Chart ✓ Molecule ✓

Fields	Type	Required	Description
label	String	No	Label used in selection menus
type	String	Yes	Display type. Only icon is supported.
dbName	String	Yes	Object and field name. Use the Insert Field button to pick the name.
privacy	Boolean	No	True if the data should be hidden in privacy mode

Example Code
NOTE: *Replace the highlighted custom fields in this code with 'real fields' from your own Org or remove them.*
TIP: *See the step-by-step Example on how to add an Icon on* **pages 9 & 13** *above*

```
"chartIcons" :
[
        {"type":"icon",   "dbName":"special.intimacy",      "privacy":true},
        {"type":"icon",   "dbName":"Common.Influence__c",  "privacy":true},
        {"type":"icon",   "dbName":"Common.Opinion__c",     "privacy":true},
        {"type":"icon",   "dbName":"Contact.LinkedIn__c",  "privacy":true},
        {"type":"icon",   "dbName":"Common.SignatoryYN__c","privacy":true}
],
```

Example Layout

Org Chart Text

Allows you to add Text, Picklist, Formula and Image fields to the Contact Chart Box.	*Parameter-Set*: **"chartText" :**
	Parameter-Set Picklist: Org Chart Text
	Parameter-Element(s): - Text
	Object(s): [Account] + [Opportunity]
	Views: Matrix ✘ Chart ✓ Molecule ✓

Fields	Type	Required	Description
label	String	No	Label used in selection menus
dbName	String	Yes	Object and field name. Use the Insert Field button to pick the name.
hidden	Boolean	No	True to hide the text by default
type	String	No	Item type "image" or "text". Defaults to "text"
width	Integer	No. image only	Image width
height	Integer	No. image only	Image height

WARNING: You cannot display Date/Time, Numeric or Boolean fields in "chartText".

TIP: Create a Formula Text field to display the data from Date/Time, Numeric or Boolean field
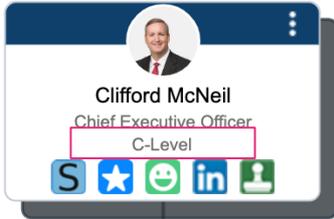
Example Code

NOTE: Replace the highlighted custom fields in this code with 'real fields' from your own Org or remove them.

TIP: See the step-by-step Example on how to add a field on **pages 7 & 8** above

```
"chartText" :
[
    {"dbName":"Contact.Linkedin_Image__c", "type":"image", "width":60, "height":60, "hidden":false},
        {"dbName":"Contact.Name", "hidden":false},
        {"dbName":"Contact.Account.Name", "hidden":false},
        {"dbName":"Contact.Title", "hidden":false},
        {"dbName":"Contact.Job_Group__c", "hidden":false}
],
```

Example Layout

Query Fields

Add Fields to the Contact Import Advanced Search & Filter field criteria.	*Parameter-Set*:	**"queryFields" :**
	Parameter-Set Picklist:	Org Chart Text
	Parameter-Element(s):	N/A
	Object(s):	[Account] + [Opportunity]
	Views:	Matrix✓ Chart✓ Molecule✗

Fields	*Type*	*Required*	*Description*
dbName	String	Yes	Object and field name. Use the Insert Field button to pick the name.

Example Code

NOTE: *Replace the highlighted custom fields in this code with 'real fields' from your own Org or remove them.*

```
"queryFields" :
[
        {"dbName":"Contact.Account.Name"},
        {"dbName":"Contact.Job_Group__c"},
        {"dbName":"Contact.Job_Group_Tier__c"},
        {"dbName":"Contact.Account.AnnualRevenue"},
        {"dbName":"Contact.Last_Contacted_Status__c"},
        {"dbName":"Contact.FirstName"},
        {"dbName":"Contact.LastName"},
        {"dbName":"Contact.ReportsToId"}
],
```

Example Layout

Relationship Types

Add 'informal' relationships between Contacts in the Charts.	*Parameter-Set*: **"relationshipTypes" :** *Parameter-Set Picklist*: **Relationship Types** *Parameter-Element(s)*: **Relationship SubTypes** **- Relationship** *Object(s)*: [Account] + [Opportunity] *Views*: Matrix✓ Chart✓ Molecule✗

Fields	Type	Required	Description
Relationship SubTypes			
label	String	Yes	Label to show in selection menus
values	Array	Yes	An array of relationships or subsets
- Relationship			
value	String	Yes	Relationship picklist value
label	String	Yes	Label shown against the relationship line
colour	String	Yes	Line colour in HTML format eg. #ff0000
arrows	Integer	Yes	Direction: 1=one way 2=both ways
dash	String	No	Line style in HTML format eg. [8,3,2]
width	Integer	No	Line width in pixels

Default Code

NOTE: The Default Code below is <u>not</u> using the 'Relationship SubType' Parameter-Element

TIP: See the step-by-step Example on how to use Relationship SubTypes on **page 19** above

```
"relationshipTypes": [
    {"value":"Knows",            "label":"Knows",            "colour":"#008000",   "arrows":2},
    {"value":"Influences",       "label":"Influences",       "colour":"#00ff00",   "arrows":1},
    {"value":"Collaborates",     "label":"Collaborates",     "colour":"#008000",   "arrows":1},
    {"value":"Socialises",       "label":"Socialises",       "colour":"#008000",   "arrows":2},
    {"value":"Supplies",         "label":"Supplies",         "colour":"#000080",   "arrows":1},
    {"value":"Supporter of",     "label":"Supporter of",     "colour":"#00ff00",   "arrows":1},
    {"value":"In Conflict with", "label":"In Conflict with", "colour":"#ff0000",   "arrows":2}
],
```

Default Layout
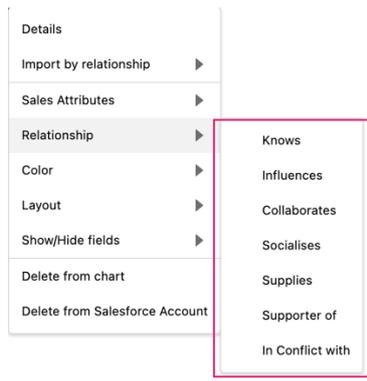
Thank you for reading this

For any questions or further support on using **OrgChartPlus**, please go to https://salesmethods.com/support/ and complete the form.