

DESCRIPTION:-

Features of the tool

Object Hierarchy graphically displays two level child hierarchy related to a particular record. For example if used within an account record, it will display all child contacts, accounts, opportunities etc. of this account, and also the children of these child contacts, accounts, opportunities.

After installation/configuration a add a Button for Object Hierarchy in the page layout of the object. To see the hierarchy of a particular record, click on the Object Hierarchy button which will display two level child hierarchies of this record in a separate tab.

The child records and grandchildren records that are displayed are either custom objects or standard objects of type Lead, Opportunity, Account, Asset, Case and Contact. User can expand and shrink the hierarchy tree by clicking on any level.

Limitations of the tool

The current version of the tool has the following limitations –

1. The tool displays a maximum of thousand records. If the total number of child records and grandchildren records are more than a thousand, then only the first thousand records are displayed.
2. The maximum number of child and grandchild object types that are supported is One hundred. If the number of child and grandchild object type is more than One Hundred, then only the first hundred records are displayed.

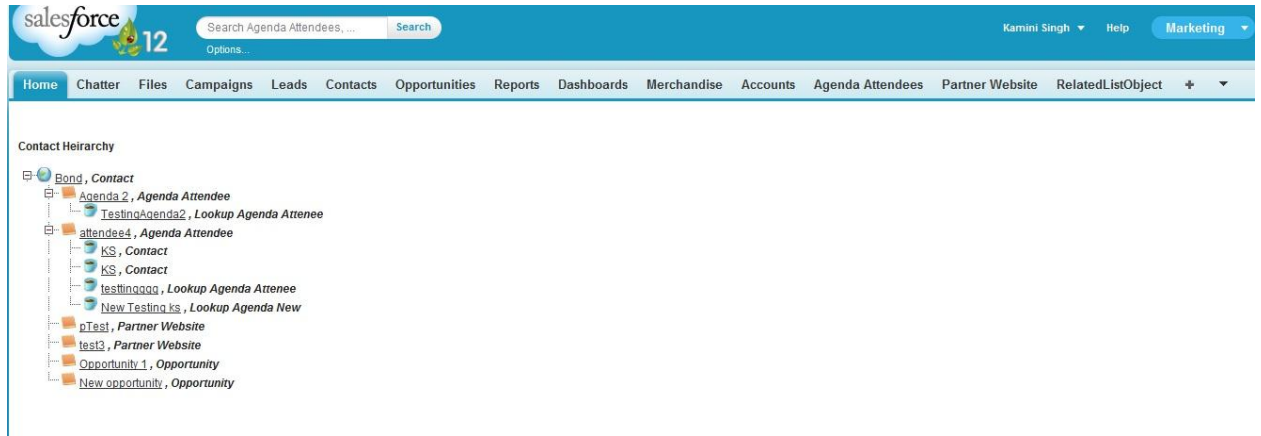
HOW 'OBJECT HIERARCHY' WORKS:-

1. Create a Button and add it to the layout of the object.

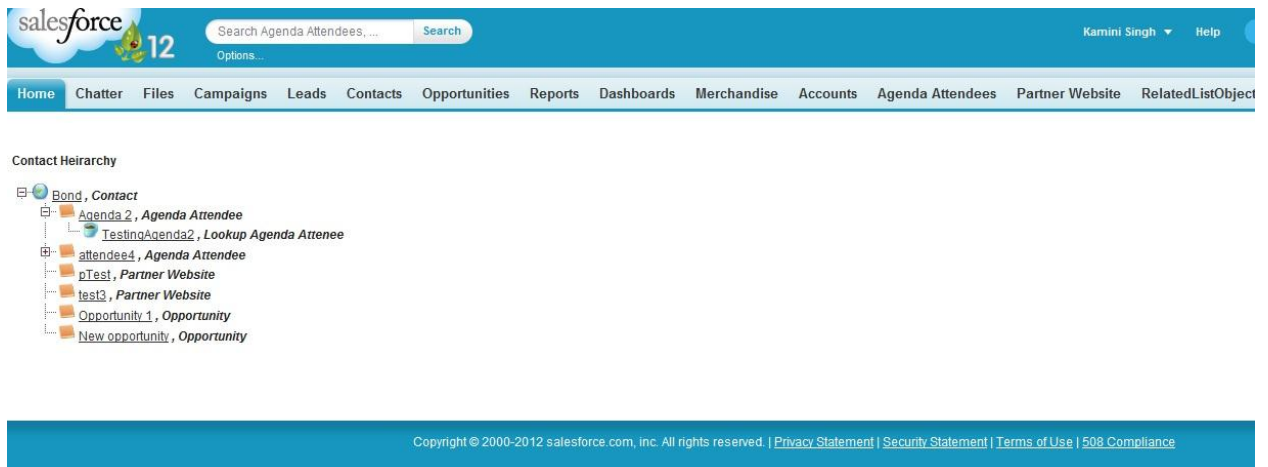
The screenshot shows a Salesforce record page for a contact. At the top, there's a 'Write something...' text area with 'Attach', 'File', and 'Link' buttons, and a 'Share' button. Below this is a 'Followers' section with 'No followers.' and a 'Sort by: Post Date' dropdown. A message says 'There are no updates.' Below that is a navigation bar with links: '< Back to List: Development Package', 'Cases (0)', 'Notes & Attachments (0)', 'HTML Email Status (0)', 'Opportunities (0)', 'Agenda Attendees (0)', and 'Partner Website (0)'. The main section is titled 'Contact Detail' and contains a table of contact information. A black arrow points to the 'Display Hierarchy' button in the top right of the 'Contact Detail' section.

Contact Detail	
Contact Owner	Kamini Singh (Change)
Name	Ms. Siddhartha Nedaerk
Account Name	sForce
Title	
Department	
Birthdate	
Reports To	[View Org Chart]
Heirarchy Link	Show Heirarchy
Agenda Attendee	
ChildObjectHierarchy10	
Mailing Address	The Landmark @ One Market San Francisco, CA 94087
Phone	
Home Phone	
Mobile	
Other Phone	
Email	
Fax	
Assistant	
Asst. Phone	
Other Address	

2. To see the hierarchy, click on the 'Display Hierarchy' button. After clicking on the button a new page is opened where user can see the Hierarchy.



3. User can Shrink or Expand the hierarchy on clicking on the '-' and '+' sign appearing in the hierarchy.



Shrunked Hierarchy