

ASTREA OBJECT HIERARCHY

INSTALLATION GUIDE

Astrea Object Hierarchy is available as a free app in AppExchange. This guide will walk you through installing Astrea Object Hierarchy into your Salesforce Org.

1. Click on the “Get IT Now” on the product listing of AppExchange.

The screenshot shows the AppExchange interface for the 'Astrea Object Hierarchy' app. The app is listed under 'Analytics, Productivity Tools'. The 'Get It Now' button is highlighted with a red rectangle and a red arrow. The app details include a release date of 5/9/2012, free pricing, and contact information for Astrea IT Services Pvt Ltd. The description states that the app displays a two-level child hierarchy for account records. There are no reviews yet, and a 'Write Review' button is visible.

appexchange™
the cloud-computing marketplace

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Apps > Analytics, Productivity Tools Search...

Astrea Object Hierarchy
App by Astrea IT Services Pvt Ltd
★★★★★ (No Rating) Like 0

Released: 5/9/2012
Pricing: Free
Support: Email Details >
Contact Information: +919818348569 Website Email

Description | Specifications | Resources | Provider

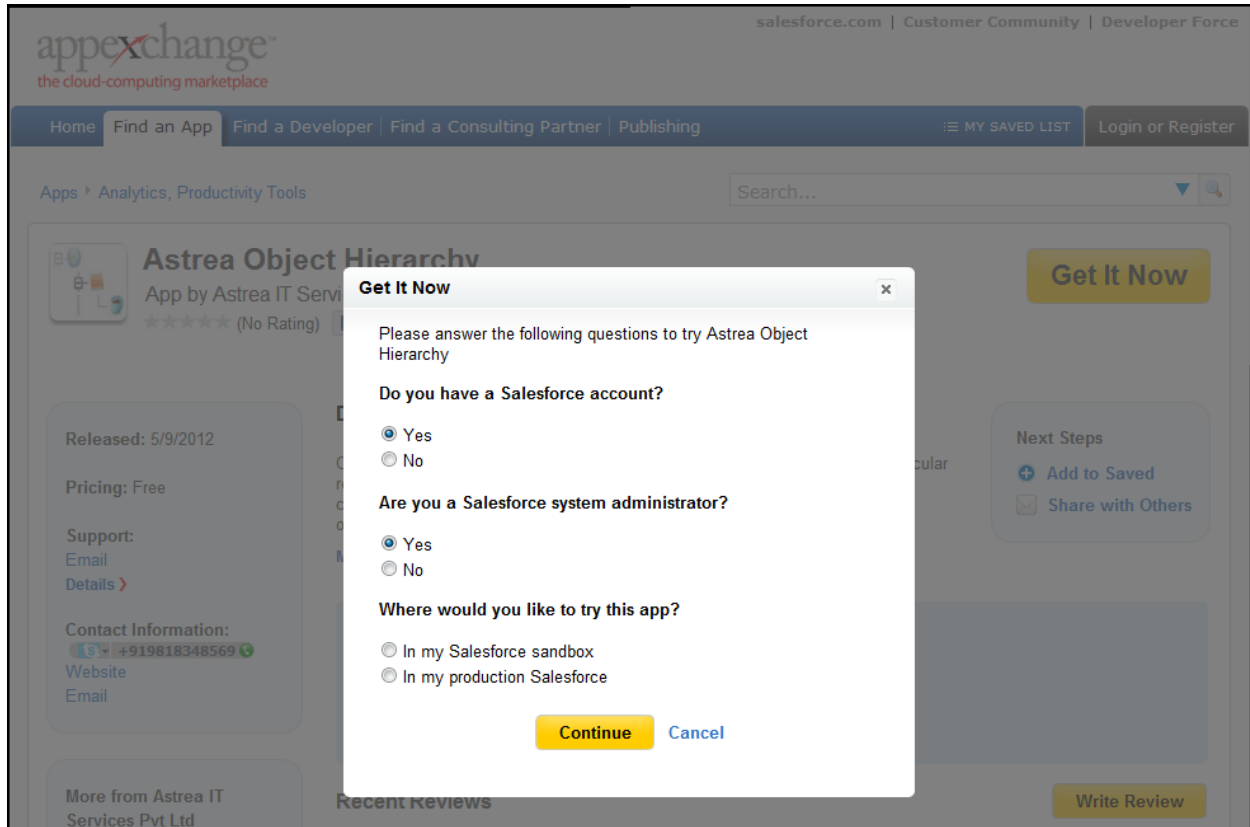
Object Hierarchy graphically displays two level child hierarchy related to a particular record. For example if used within an account record, it will display all child contacts, accounts, Opp etc. of this account, and also the children of the child object

Next Steps
+ Add to Saved
✉ Share with Others

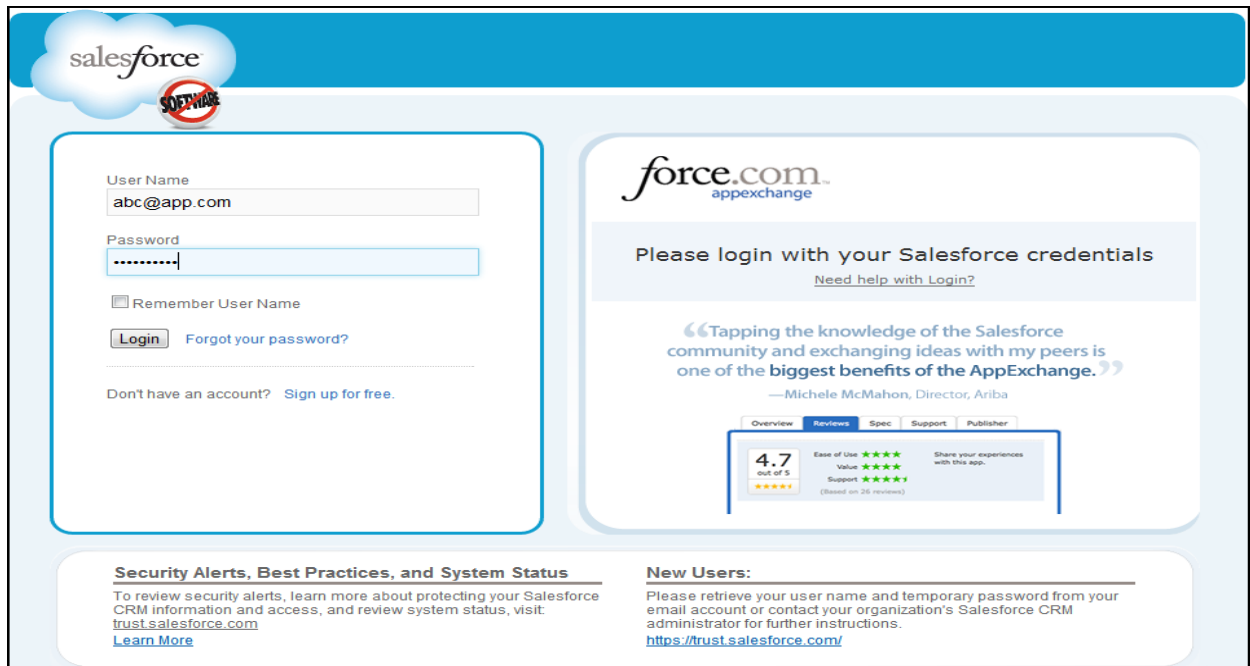
Recent Reviews Write Review

There are no reviews. Be the first and [write a review](#).

2. Answer the question's asked for installing the App.



3. Enter your credentials.



4. Click on 'Continue' to proceed with the installation.

Home Files Countryinfo Contacts Accounts Leads Cases Opportunities Products Reports Chatter Stateinfos Contracts Campaigns Day LightInfos + ▾

Expand All | Collapse All

Quick Find

Force.com Home

System Overview **New!**

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

App Setup

- Customize
- Create
- Develop
- Deploy
- Schema Builder
- Installed Packages

Package Installation Details

Help for this Page ?

Package Name: Astrea Object Hierarchy

Version Name: Spring 2012

Version Number: 1.0

Publisher: Astreat

Description

Continue Cancel

Package Components

▼ Resources (4)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Astrea Object Hierarchy	Lead	Custom Link within salesforce.com	This is a brand new component.
Create	Astrea Object Hierarchy	Account	Custom Link within salesforce.com	This is a brand new component.
Create	Astrea Object Hierarchy	Opportunity	Custom Link within salesforce.com	This is a brand new component.
Create	Astrea Object Hierarchy	Contact	Custom Link within salesforce.com	This is a brand new component.

5. Follow Step 1 to 3.

Force.com Home

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- Deploy
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- Installed Packages
- AppExchange Marketplace
- Critical Updates

Administration Setup

- Manage Users

Step 1. Approve Package API Access

Step 1 of 3

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects

This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions

	Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓
Assets	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓
Cases	✓	✓	✓	✓
Contacts	✓	✓	✓	✓
Contracts	✓	✓	✓	✓
Documents	✓	✓	✓	✓
Ideas	✓	✓	✓	✓
Leads	✓	✓	✓	✓
Opportunities	✓	✓	✓	✓
Price Books	✓	✓	✓	✓
Products	✓	✓	✓	✓
Push Topics	✓	✓	✓	✓
Solutions	✓	✓	✓	✓

General User Permissions

This Package will be able to use all of the General User Permissions from the user's Profile.

6. Select a checkbox which you want and Click on the 'Next' Button.

Home Files Countryinfo Contacts Accounts Leads Cases Opportunities Products Reports Chatter Stateinfos Contracts Campaigns Day LightInfos + ▾

Expand All | Collapse All Quick Find

Force.com Home

System Overview **New!**

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Package Installer

Astrea Object Hierarchy

Help for this Page ?

Step 2. Choose security level Step 2 of 3

Select security settings:

- ☒ Grant access to admins only Users with your profile get full access (best for limited deployments)
- ☐ Grant access to all users All internal custom profiles get full access
- ☐ Select security settings User access set by profile (recommended for most packages)

Previous Next Cancel

7. Click On the 'Install' Button.

Home Files Countryinfo Contacts Accounts Leads Cases Opportunities Products Reports Chatter Stateinfos Contracts Campaigns Day LightInfos + ▾

Expand All | Collapse All Quick Find

Force.com Home

System Overview **New!**

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App Setup

- ▶ Customize
- ▶ Create
- ▶ Develop
- ▶ Deploy

Package Installer

Astrea Object Hierarchy

Help for this Page ?

Step 3. Install Package Step 3 of 3

The package is ready to be installed. Click Install to continue.

Previous Install Cancel

8. A Notification will be shown when installation is completed.

The screenshot shows the Salesforce Package Details page for 'Astrea Object Hierarchy (Managed)'. A yellow notification banner at the top states 'Install Complete' with a green checkmark icon and the text 'Follow any remaining steps in the app install guide to complete deployment.' Below the notification, the 'Installed Package Detail' section is visible, featuring buttons for 'Uninstall', 'View Components', and 'View Dependencies'. The package details are as follows:

Package Name	Astrea Object Hierarchy	Version Number	1.0
Language	English	First Installed Version Number	1.0
Version Name	Spring 2012	Package Type	Managed
Namespace Prefix	Object-Hierarchy	API Access	Unrestricted [Enable Restrictions]
Publisher	Astreatit	Modified By	Avinash Mishra, 5/9/2012 2:57 PM
Description			
Installed By	Avinash Mishra, 5/9/2012 2:57 PM		

9. Now, you can check the listing of 'Astrea Object Hierarchy' App by clicking on the 'Installed package' Link.

The screenshot shows the 'Installed Packages' list in Salesforce. The 'Astrea Object Hierarchy' app is highlighted with a red arrow. The list includes the following information for each package:

Uninstall	Package Name	Developer Name	Version Number	Package Name	Status	License	Number of Licenses	Expiration Date	Last Modified
Uninstall	Smart vCard	astrea it services	1.3	SmartvCard	Active	Unlimited	0	Does not Expire	2/13/2012 2:31 AM
Description: Export any of your contacts, leads, Users & Accounts to the vCard format with a single click of a button. & Support VCF 3.0 & VCF 2.1 Instantly search...									
Uninstall Manage Licenses	awduplicate	Addressed World	1.18.8	awduplicate	Active	5	1	Does not Expire	2/9/2012 1:48 AM
Description: Duplicate Check for salesforce.com will enable your salesforce users to identify duplicate easily so they cannot create duplicates in your salesforce....									
Uninstall	Dupe Eliminator	sflab	1.7	dupe_eliminator	Free	N/A	N/A	N/A	2/8/2012 11:24 PM
Description: This app is designed to help you search duplicate records on any object (standard and custom), and any field you specify, and allowing you to merge t...									
Uninstall	Print Anything	Print Anything v8 LMO	1.1	PRINTANY	Free	N/A	N/A	N/A	2/8/2012 11:35 PM
Uninstall	Uniserv DQ Connector	Uniserv GmbH	2.0	artUniserv	Expired	Unlimited	0	3/10/2012	2/9/2012 9:12 PM
Uninstall	Astrea Object Hierarchy	Astreatit	1.0	Object-Hierarchy	Free	N/A	N/A	N/A	5/9/2012 2:58 AM
Uninstall	DupeCatcher	Symphonic Source	1.73	SFSSDupeCatcher	Active	Unlimited	0	Does not Expire	2/9/2012 9:00 PM
Description: This application can identify potential lead, contact and account duplicates as a user creates or update leads, contacts or accounts.									

The steps so far are similar to installation steps of any app from AppExchange. The next steps are specific to Astrea Object Hierarchy.

10. First we need to add a button to page layout of standard objects in which hierarchy functionality is required. Drag and Drop the 'Astrea Object Hierarchy' Button on the layout of the standard object in which you want to use this functionality. This is currently supported for four standard objects – Account, Opportunity, Contact and Lead.

The screenshot displays the Salesforce 'Opportunity Layout' editor. The top navigation bar includes links for 'Custom Console Components', 'Mini Page Layout', 'Mini Console View', 'Video Tutorial', and 'Help for this Page'. Below the navigation bar is a toolbar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties' buttons. A left sidebar contains a tree view with 'Fields', 'Buttons', 'Custom Links', 'Custom S-Controls', and 'Related Lists'. The 'Buttons' section is active, showing a 'Quick Find' bar and a list of buttons: 'Astrea Object Hierarchy', 'Sharing', 'Clone', 'Submit for Approval', 'Delete', and 'Edit'. The main workspace shows the 'Opportunity Sample' layout. It includes a 'Highlights Panel' with a customization prompt and a wrench icon. Below this is the 'Opportunity Detail' section, which contains two groups of buttons: 'Standard Buttons' (Edit, Delete, Clone, Sharing) and 'Custom Buttons' (Astrea Object Hierarchy). The 'Astrea Object Hierarchy' button is circled in red. At the bottom, the 'Opportunity Information' header is visible, showing fields like 'Opportunity Owner' (Sample User), 'Private' status, 'Amount' (\$123.45), and 'Expected Revenue' (\$123.45).

11. For Custom Objects, in which the Object Hierarchy button needs to be displayed, we need to create custom button of content source “URL”, behavior “display in new window” and paste the following formula:

`"/apex/ObjectHierarchy__AstreaObjectHierarchyVFPPage?id="{!ObjectAPIName.Id}`

In place of ‘ObjectAPIName’ write API name of the object for which you want to make a button. Please note that the api names for custom object are prefixed with __c. So if name of custom object is testObj__c, your URL may appear as

`"/apex/ObjectHierarchy__AstreaObjectHierarchyVFPPage?id="{!testObj__c.Id}`

Custom Button or Link Edit [Save] [Quick Save] [Preview] [Cancel]

Label: Astrea Object Hierarchy

Name: Astrea_Object_Hierarchy ⓘ

Description: [Text Area]

Display Type: ☐ Detail Page Link [View example](#) ☒ Detail Page Button [View example](#) ☐ List Button [View example](#)

Behavior: Display in new window [Dropdown] [View Behavior Options](#)

Content Source: URL [Dropdown]

Quick Tips

- [Getting Started](#)
- [Sample Buttons & Links](#)
- [Operators & Functions](#)

Select Field Type: AMP Plan [Dropdown] Insert Field: -- Insert Merge Field -- [Dropdown] Insert Operator: [Dropdown]

Formula: `"/apex/ObjectHierarchy__AstreaObjectHierarchyVFPPage?id="{!AMP_Plan__c.Id}`

Functions [Dropdown: -- All Function Categories --]

- ABS
- AND
- BEGINS
- BLANKVALUE
- CASE
- CASESAFEID

[Insert Selected Function]

12. Add this Button in the page layout of the Custom Object to get the features of 'Astrea Object Hierarchy'.

Account

United Oil & Gas Corp.

Customize Page | Edit Layout | Printable View | Help for this Page ?

Hide Chatter

Follow

Write something...

Followers

Attach

File

Link

Share

No followers.

Sort by: Post Date ▾

There are no updates.

« Back to List: Custom Object Definitions

Contacts [4] | Opportunities [10] | Cases [7] | Open Activities [4] | Activity History [1] | Notes & Attachments [0] | Partners [0] | Approval History [0] | R3 Sales Call/Meeting Plan [0]

Account Detail

Edit

Delete

Include Offline

Generate vCard

Astrea Object Hierarchy

Account Owner	 Avinash Mishra [Change]	Rating	Hot
Account Name	United Oil & Gas Corp. [View Hierarchy]	Phone	 (212) 842-5500 
Parent Account		Fax	(212) 842-5501
Account Number	CD355118	Website	http://www.uos.com
Account Site		Ticker Symbol	UOS
Type	Customer - Direct	Ownership	Public