



Installing Org Chart

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Configure For Users or Contacts

- Org Chart can create a hierarchy from users or contacts. Please select one of the following fields for your Org Chart instance to be built from.
☒ Users ☐ Contacts

Deploy to Heroku

- Use this "Deploy to Heroku" button to install the Org Chart app to your Heroku instance.
(Remember the name you give your app, as you will need it when creating the Connected App in your org.)

Download Required Files From Documents

- Navigate to the Org's documents page by [clicking here](#).
- From the documents page, locate the **Folder** picklist and select, **OrgChartFiles**.
- Download the database schema (will need later).
- Copy the **OrgChartIcon** URL. Click on the **View** link, this should open a new window with the just the Org Chart icon on the page, copy this URL. (You will need it for the next step.)

Create a New Connected App

1. Create a canvas connected app in your Salesforce Org, [click here](#) to navigate to the setup page. Then make sure to fill in all of the following fields.
2. Enter your basic information.

Basic Information

= Required Information

Connected App Name

OrgChart

API Name

OrgChart

Contact Email

your_email@salesforce.com

Contact Phone

Logo Image URL ?

https://c.na34.content.force.com/servlet/servlet.ImageServer?id=01561000000

[Upload logo image](#) or [Choose one of our sample logos](#)

Icon URL ?

https://c.na34.content.force.com/servlet/servlet.ImageServer?id=01561000000

[Choose one of our sample logos](#)

Info URL

Description

3. Enable **OAuth** Settings, include the **Callback URL** and add **Full access(full)** to the selected OAuth scope. The callback URL is [https://\[your app name on Heroku\].herokuapp.com](https://[your app name on Heroku].herokuapp.com)

▼

API (Enable OAuth Settings)

Enable OAuth Settings

☒

Callback URL ?

https://your-app-name.herokuapp.com/

Use digital signatures

☐

Selected OAuth Scopes

Available OAuth Scopes

Access and manage your Chatter data (chatter_api)

Access and manage your Wave data (wave_api)

Access and manage your data (api)

Access custom permissions (custom_permissions)

Access your basic information (id, profile, email, address, phone)

Allow access to your unique identifier (openid)

Perform requests on your behalf at any time (refresh_token, offline_access)

Provide access to custom applications (visualforce)

Provide access to your data via the Web (web)

Add

▶

◀

Remove

Selected OAuth Scopes

Full access (full)

4. Fill in the canvas app settings. Check the **Force.com Canvas** box. For the **Canvas App URL** use the callback URL, but make sure to append `/auth/signedrequest` to the URL. Then make sure to select **Signed Request (POST)** for the **Access Method**. Finally add Mobile Nav to your Select Locations

Canvas App Settings

Force.com Canvas

☒

Canvas App URL

Access Method

Signed Request (POST)

SAML Initiation Method

None

Locations

Available

Chatter Feed

Chatter Tab

Console

Layouts and Mobile Cards

Open CTI

Publisher

Visualforce Page

Add

Remove

Selected

Mobile Nav

Lifecycle Class

5. Click **save**.

Change OAuth Policies

1. Navigate to the **Connected Apps** menu, [click here](#). Next, click the **Manage** action on your Org Chart application, then click on the **Edit** button.
2. Change your **OAuth** settings to match the image below.

Basic Information

= Required Information

Start URL

i

Mobile Start URL

i

OAuth policies

Permitted Users

Admin approved users are pre-authorized

IP Relaxation

Enforce IP restrictions

Refresh Token Policy:

Refresh token is valid until revoked

Session Policies

Timeout Value

--None--

High assurance session required

User Provisioning Settings

Enable User Provisioning

i

Save

Cancel

3. Click **save**.

Enable User Group Profile Permissions

1. Navigate to the **Connected Apps** menu, [click here](#). Then click the **Manage** action for your Org Chart application.
2. Locate the Profiles, and click the **Manage Profiles** button.

Profiles

Manage Profiles

Profile	Profile Description
System Administrator	

3. This next screen contains a list of all the available user profile groups. Select all the user groups that you want to be able to access your application.
4. Click **save**.

Add to Your Mobile Navigation Menu

1. Navigate to the **Mobile Navigation Menu**, [click here](#).
2. Add your application to the **Selected Navigation Menu Items** (you can also use the up and down buttons to change the order in which your app will appear).

Navigation Menu Items [Save] [Cancel]

Available

OrgChart

Selected

Feed
OrgChartLocal
orgchart_ab
Today
Dashboards
Tasks
Smart Search Items
People
Groups
Reports

Add [Right Arrow]
Remove [Left Arrow]

Up [Up Arrow]
Down [Down Arrow]

Use SHIFT + click or click and drag to select a range of adjacent items. Use CTRL + click to select multiple items that are not adjacent.

[Save] [Cancel]

3. Click **save**.

Heroku Set-up

1. Retrieve your **Consumer Secret** by clicking [this link](#), then click on the link for your application. Click on **Click to Reveal** to reveal your **Consumer Secret**.
2. Retrieve your Consumer Secret from your connected app and set it as an environmental variable with the name **APP_SECRET** [click here](#) to navigate to the Heroku dashboard.
3. Make sure your app is selected. Then click the **Settings**

- Click the **Reveal Config Vars** button

Config Variables

Config vars change the way your app behaves. In addition to creating your own, some add-ons come with their own.

Reveal Config Vars

- Click the **Edit** button enter the **KEY** as **APP_SECRET**, and the **VALUE** as your app secret from the newly created connected app from your Org.

Config Variables

Config vars change the way your app behaves. In addition to creating your own, some add-ons come with their own.

Config Vars


APP_SECRET	1234567890000	↩
DATABASE_URL	postgres://saiqcaxugecwhu:AMWIk	⊖

Cancel **Save**





- Click **save**.

Heroku Connect Set-up

- Go back to the resources page or [click here](#) to navigate to the Heroku dashboard.
- Locate the Add-Ons from the resources page and click on **Heroku Connect**.

Add-ons				FIND MORE ADD-ONS
<input type="text" value="Quickly add add-ons from Elements"/>				
	Heroku Postgres :: Database	Hobby Dev	Free	⋮
	Heroku Connect	Demo Edition	Free	⋮
Estimated Monthly Cost				\$0.00

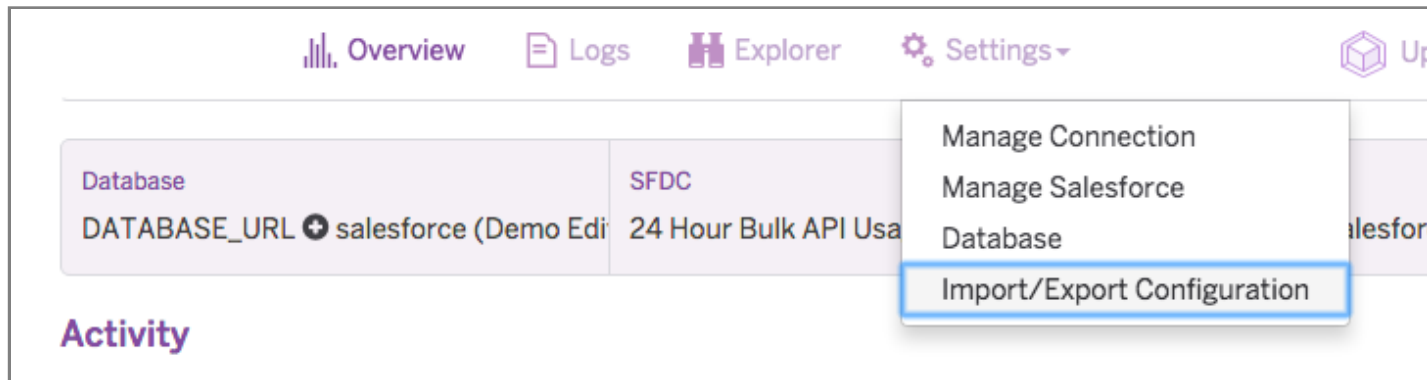
3. Click the **Begin Setup** button.

 Overview
  Logs
  Explorer
  Settings ▾

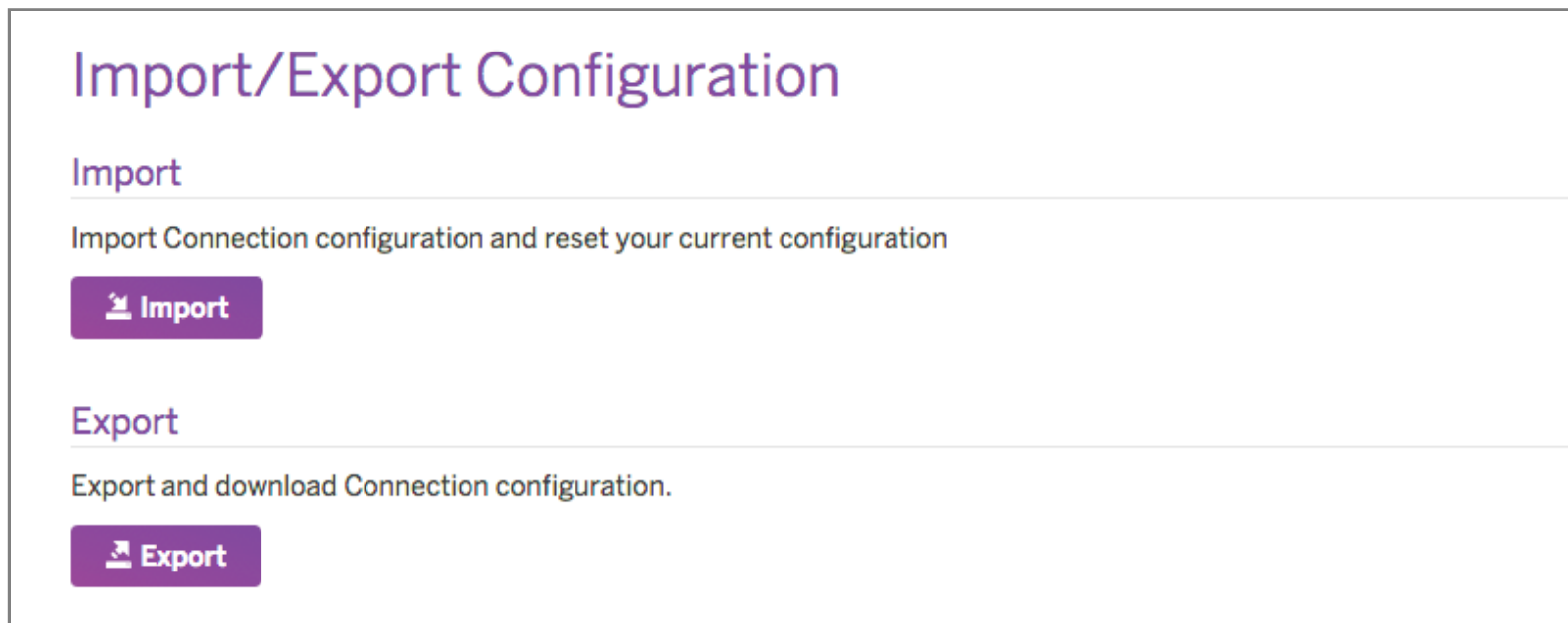
This Connection has not completed provisioning.

Before you can begin synchronizing data, you must configure the connection's database. [Begin Setup](#)

- Heroku Connect will prompt you to Authorize and link the connection to your Salesforce data. Select **Production**, and then log-in to your Salesforce Org and allow permissions to the app.
- From the Heroku Connect home screen click on **Settings** then click on **Import/Export Configuration**.



6. Click the **Import** Button.



7. Use the downloaded **DataBaseSchema.JSON** file (in the documents), and import the data base schema into the Heroku Configuration.

8. Click on the **Choose a File** button and upload the **DataBaseSchema.JSON** file.

DONE!

- Restart the heroku server, log into [Heroku Connect](#), and click **Settings** tab, next click **Manage Connection** link, then click the **Restart** button.

- Test out your installed Org Chart application in Salesforce mobile, by [clicking here](#).

Optimizations

- The free tier Heroku instance only allows a connection of 10,000 rows of data, if you need more rows to be connected you can remove the mapping that you are currently not using.

For example if you selected **Users** for your configuration, you can go to [Heroku Connect](#) and delete the mapping for **Contacts**.

Local Set-up

- Org Chart can be set up to run locally, visit the [Git Repository](#) for instructions on setting this up.