

Automation to associate new contact info on a child account to all accounts in an Account Hierarchy Model

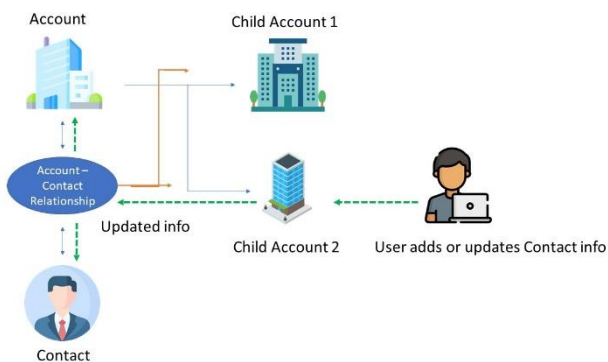
Scenario

When a customer requests a new contact creation under one of the accounts in an account hierarchy model, the new information should be associated with all other accounts in hierarchy.

Solution overview

1. Create a custom field in the account object to store the Id of Group Id.
2. In order to populate the Group Id field with Top parent account Id, a trigger on the account object captures top parent account Id and populate it as value for the new custom field created.
3. The automation solution includes a trigger on Contact object, which will fetch the list of accounts and associate the related contact through the Account – Contact - Relationship.

Process Overview



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