

OrgChartPlus

Release Notes

Version 7.0+



What's new in v7?

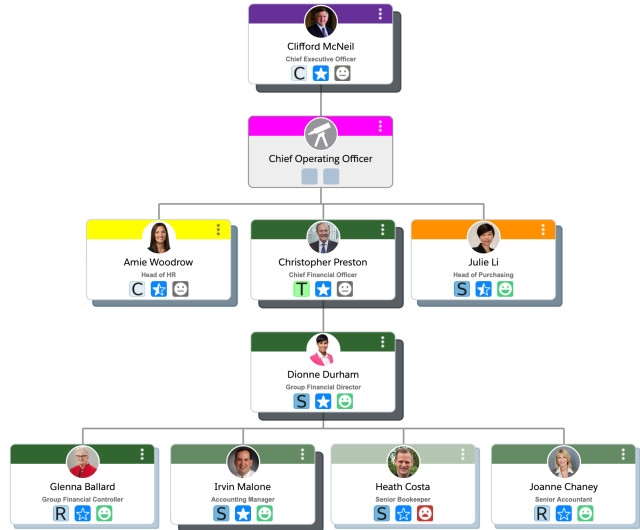
OrgChartPlus Salesforce Lightning Experience

With the **OrgChartPlus v7.0** fresh, clean and contemporary Lightning look we now offer our customers a more intuitive experience.

We have also improved and enhanced the workflow, which means fewer clicks, so you can see your results with less effort.

And very importantly, the back-end technology and structure remain the same, so as with previous releases, there won't be any continuity or security issues when you upgrade to v7.

AppExchange...<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000004fjGWEAY>



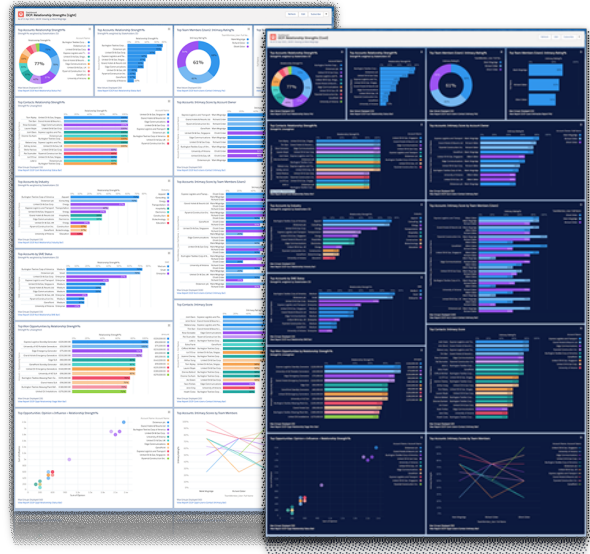


OrgChartPlus Dashboards & Charts Package

You can additionally download and install the **OrgChartPlus Dashboards & Charts Package**.

The Dashboard graphically shows you two principal criteria of your organisation's 'connection' to your customers in terms of **Relationship Strengths** and **Intimacy Ratings**.

You can also add pre-built charts to your Account, Contact and Opportunity layouts to provide this inciteful knowledge at record level.



Click on the appropriate link to download **OrgChartPlus Dashboards & Charts**:

Production... <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4L0000004va3>

Sandbox... <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4L0000004va3>



Release Notes

v7.4

Improvements

- New Loading Bay in Chart View to hold 'un-related' contacts.
- Loading Bay now holds Contact and Team Import buttons/options.
- Chart, Molecule and Matrix Views now handle both click and touch for PC and Mac users.
- Default Attribute icons changed to 20x20 pixel .SVG images and the images conform to Salesforce icon guidelines and standards.
- The 'About OCP' icon displays details on version, JSON parameters and GUI information.

Minor changes

- Menu header size reduced slightly to save space.
- The default View is now Chart View
- Direct selection of Attribute icons in Chart and Molecule Views.
- Popup Attribute menus display the Attribute label.
- Hover-over boxes are shown for contact box icons.
- Text in the contact box can now be wrapped to multiple lines with the parameterisation setting "overflow".
- The Print form now contains scale buttons.
- Chart View zoom buttons and the print form scale buttons can be held for continuous zoom/scroll.

v7.8

Improvements

- GIF support for photo images.
- New icon wrapping for parameterised charts with more than 6 attributes.

Minor Changes

- None



v7.9

Improvements

- The loading bay now shows reporting hierarchy, the number of hidden subordinates, and allows the user to expand the list to show hidden contacts.
- Dragging and dropping a contact over a placeholder allows the user to easily replace the placeholder with the contact.
- The team and competitor looking now uses 'precise' searches on encrypted fields to better support encrypted orgs with deterministic encryption.
- Left clicking or touching cells in the matrix view opens the attribute or picklist selection menu.
- Org chart layouts can be set using a new on-screen menu button.
- The matrix view now supports multiple cell block selection.
- Added "hideChartFields" parameterisation setting to "settings" to enable fields to be hidden by default.

v7.12

Improvements

- User profile images now shown by default in the chart view.
- Full-screen button added to the Matrix View.

v7.21

Improvements

- Added significant improvements for Platform Encryption support.

v7.24

Improvements

- Enabled new "Add Contact" integration for Lightning users.



v7.28

Improvements

- RecordType support in LWC Add Contact
- Reinstate support for “Export as URL”
- Add custom label and SOQL query for contactRels to allow restricted importing
- An entry in the connect popup menu to allow inline edit of references via the picker form.
- Fixed help text to remove the section regarding reordering the matrix rows
- Position of the chart contact menu icon when an on-border icon is in the top-right corner
- “Export as web page URL” option in export menu to allow users to send a link to the chart to another user via email or chat

v7.29

Improvements

- A fix for the “View More” link in the Import Contacts form not working. This was preventing users from importing more than 200 contacts.
- The grid in the Import Contacts and Open Chart form was not accepting keyboard inputs. It now correctly supports arrow keys, home, end, etc.
- There was a known bug in Safari that was causing drag-drop issues. This should now be fixed in Safari 15.5. The previous workaround will now be disabled if the user is running Safari v15.5 or later.
- Permission checks of contacts was not being properly handled. Where users include contacts they only have read access to, OCP now prevents users from making changes. This avoids the user seeing permissions errors when trying to save the chart.
- Improvements to the rendering engine to fix random bugs.



v7.30

Improvements

- Allow the matrix columns to scroll to fix the space and allow users to resize the column section. (Resizing individual columns is not yet available.)
- Enable the Export menu when the chart is read-only.
- Fix for crash when stored intimacy value does not match the parameterisation.
- Fix for crash if Open tab is not displayed due to parameterisation.
- Fix for crash when formula processes null multi-picklist value.
- Fix for RecordType being used in formulas causing a crash..



System Requirements

You can still run OrgChartPlus in **Classic** and **Lightning** mode.

Admins can now access the **OrgChartPlus Configuration** page in **Lightning** mode via the Navigation Menu Bar, but you must also have a '**My Domain**' subdomain setup in your Org.

To check: To see if you have 'My Domain' activated, switch to Salesforce Lightning Experience and look at the browser URL of your Salesforce Org, if the URL shows a 'Salesforce Instance' (eg: **na171**.lightning.force.com) then you do not have '**My Domain**' active.

To Setup: If you are the Salesforce Admin follow this guideline to get 'My Domain' activated...

https://help.salesforce.com/articleView?id=domain_name_setup.htm

IMPORTANT: Notice to v5-6.5 OCP Users

We recommend that you install **v6.13** before upgrading to v7, here are the links...

Production: <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t2G000000cD9i>

Sandbox: <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t2G000000cD9i>

IMPORTANT: Notice to existing OCP Users

If you have an OCP Chart that contains multiple un-linked hierarchies, then you may need to manually reorganise the positions of those hierarchies within the Chart after this upgrade. If you have any questions in this regard, please go to

<https://salesmethods.com/support/> and complete the form.

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.

