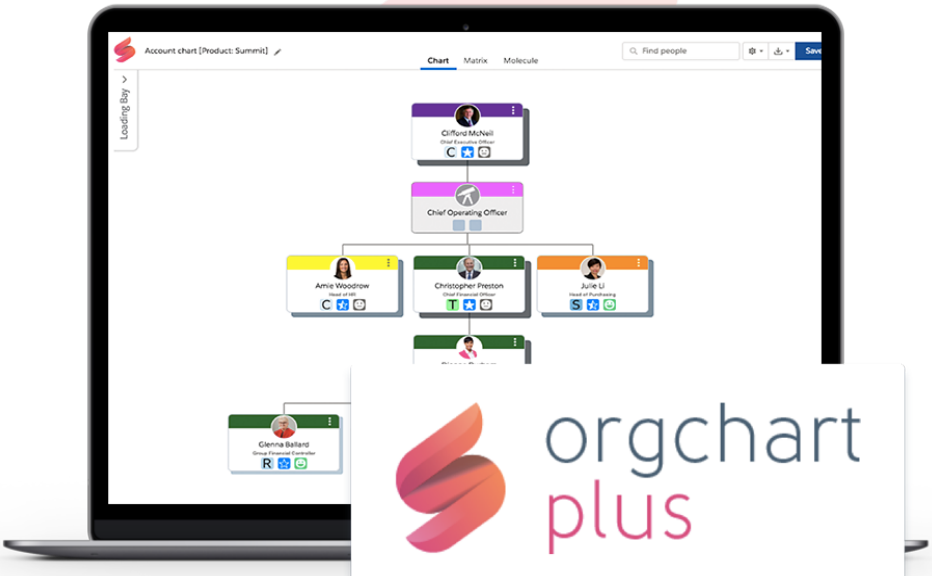


OrgChartPlus

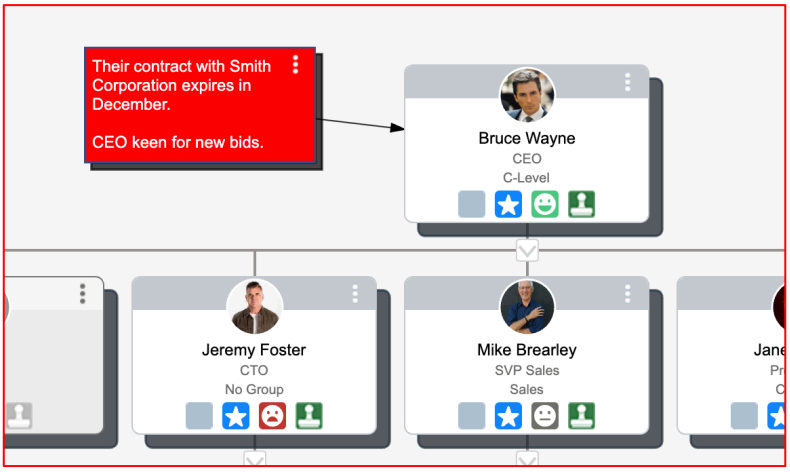
Release Notes

Version 8.01

sales methods

What's new in v8.01?

Download OrgChartPlus from the AppExchange...
https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000004fjGWEAY



OrgChartPlus Notes

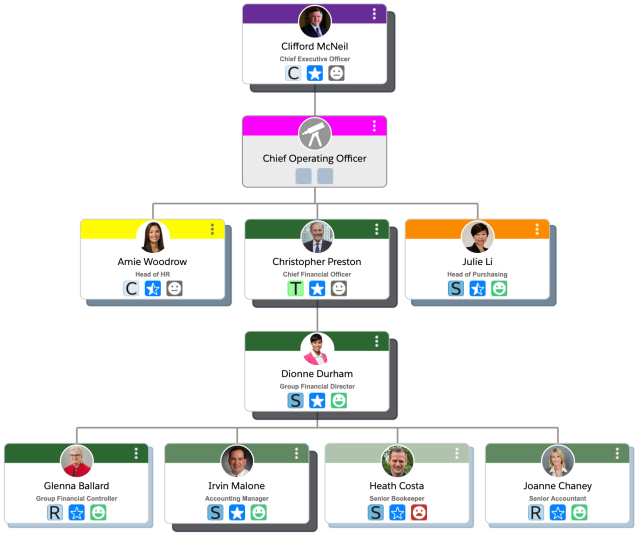
OrgChartPlus v8+ includes Notes. Add colour-coded details in notes that may be related to Contacts, Team Members, or to other Notes.

OrgChartPlus Salesforce Lightning Experience

OrgChartPlus v7+ has a fresh, clean and contemporary Lightning look for 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.



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

v8.01

Improvements

It contains the new Notes feature as before but with additional changes:

- Fixed the crash in the molecule code when a contact related to a note.
- Fixed export to DOCX crashing when a note was present.
- Fixed missing notes relationship lines in exports.
- Improved the note colour palette and changed the default colour to white.
- Reduced the minimum size of the note box.
- Improved the office export so all the note text is included in the box.
  (This causes the text to overlap the box in PPTX which seems to be a limitation of PowerPoint.)
- Fixed the misaligned “new note” button.
- Enabled mouse right-click on the note box.

v7.42

Improvements

- The popup menus now respond to number keys in the same way as for matrix cells. When clicking a matrix cell, the popup menu is opened. You can use **1-9** to select a value or **0** to select none. The popup then closes and the user can use arrow keys to navigate. No need to press **ESC** to close the popup when using the keyboard.
- Contacts in the import contact form were not being sorted correctly. Enable the Export menu when the chart is read-only.
- The New Chart checkboxes under "Select initial imports" can now be programmed to disable and/or pre-select other checkboxes, enabling combinatorial rules. See **newChartImportCheckboxes** below.
- The "lock" icon was being shown on team member contact boxes.

Freezing rows/columns in XLSX exports

From OCP v7.42, when exporting to XLSX the team member rows will be frozen so the team names are still visible when scrolling down. This can be changed with the following script:

```
"settings" : { "xlsxMatrixFreezeRows" : false }
```

A column can also be frozen by naming the last column to freeze:

```
"settings" : { "xlsxMatrixFreezeColumn" : "Contact.Name" }
```

"Select initial imports" checkbox rules

A customer may want to apply selection rules to the checkboxes in the New Chart form. This can be achieves with the following script:

```
"settings" : {
      "newChartImportCheckboxes" : [
            [0, 'checked', {1:'check disable', 2:'check disable',
3:'uncheck'}],
            [1, 'unchecked', {2:'check', 3:'check'}]
      ]
}
```

`newChartImportCheckboxes` applies a list of rules to one or many checkboxes, all numbered down the form with the top checkbox being "0".

Each rule can apply one or more status changes to other checkboxes. Supported status names include "check" to check the box, "uncheck" to remove a check", and "disable" to prevent user changes.

In the above example, clicking the top checkbox will check and disable the next two boxes and then uncheck the next checkbox. In addition, un-clicking the 2nd box will cause the next two boxes to be checked.

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.

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.

v7.28

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

v7.24

Improvements

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

v7.21

Improvements

- Added significant improvements for Platform Encryption support.

v7.12

Improvements

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

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.

v7.8

Improvements

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

Minor Changes

- None

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.

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 v8, 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 contact SalesMethods support by submitting the form at: https://salesmethods.com/support/

Thank you for reading this

For any questions or further support on using OrgChartPlus, please contact SalesMethods support:
https://salesmethods.com/support/

sales methods