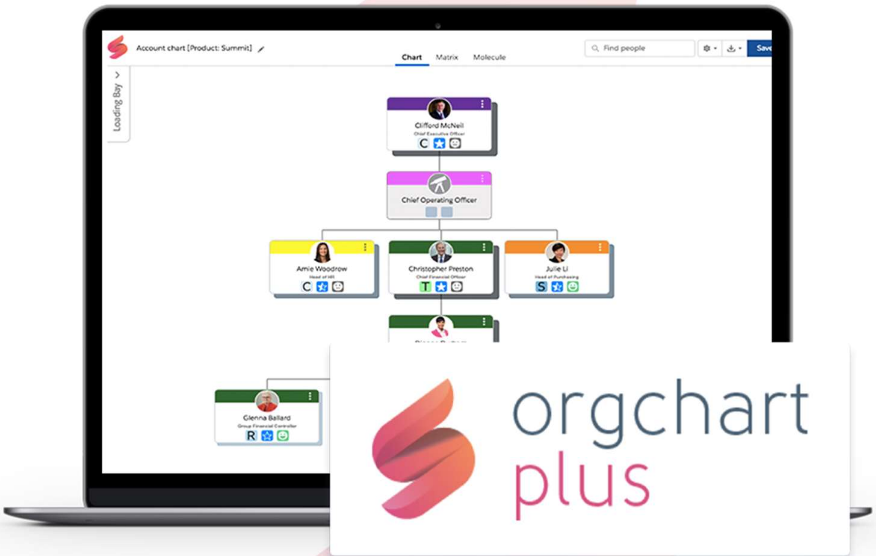


OrgChartPlus

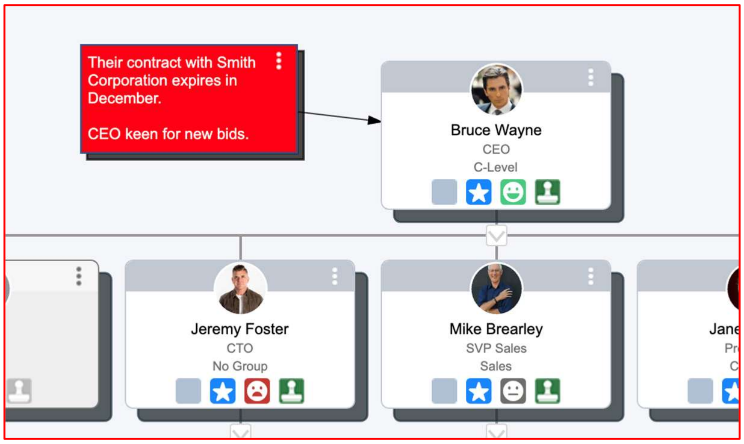
Installation Instructions

Version 8.0+

sales
methods

Contents

What's new in v8.0+?



OrgChartPlus Notes

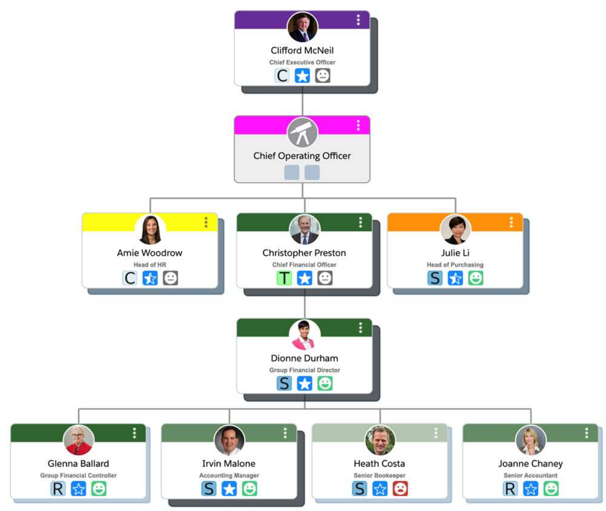
OrgChartPlus v8+ includes Notes. Add colour-coded details in notes that may be related to Contacts, Team Members, or to other Notes.

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.



Quick Install

Thank you for choosing OrgChartPlus. These instructions will guide you through the installation and configuration of the product. Please follow the guide carefully and complete all instructions before trying to use the product.

If you have any problems, please go to https://salesmethods.com/support/ and complete the form.

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.

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 go to https://salesmethods.com/support/ and complete the form.

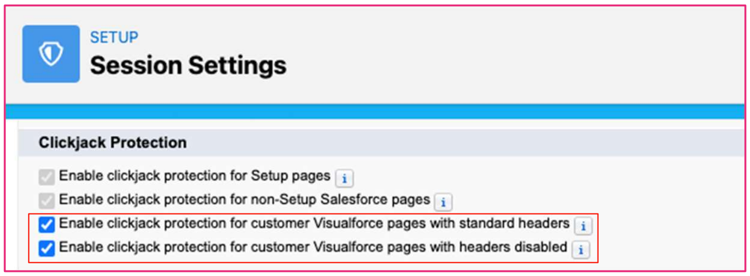
IMPORTANT: Do you have Clickjack Protection Enabled?

If you have enabled Clickjack Protection, you must add your Salesforce domain as a Trusted Domain.

Please check your **Session Settings**...

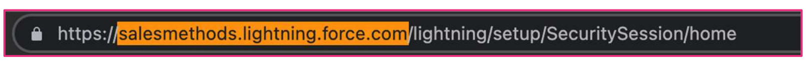
Classic | Setup > Security Controls > Session Settings
Lightning | Setup > Security > Session Settings

If your '**Session Settings**' have either of these option boxes ticked...

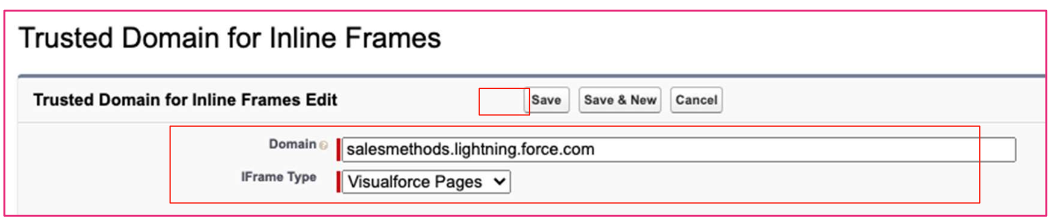


...then you need to add your Visualforce domain to the **Trusted Domains**.

1. From the browser's URL line, select the domain part of the URL, excluding the protocol (https://), and **{Edit > Copy}** that text.



2. Return to '**Session Settings**' and scroll down to the **Trusted Domains** area...
3. Click on the **[Add Domains]** button.



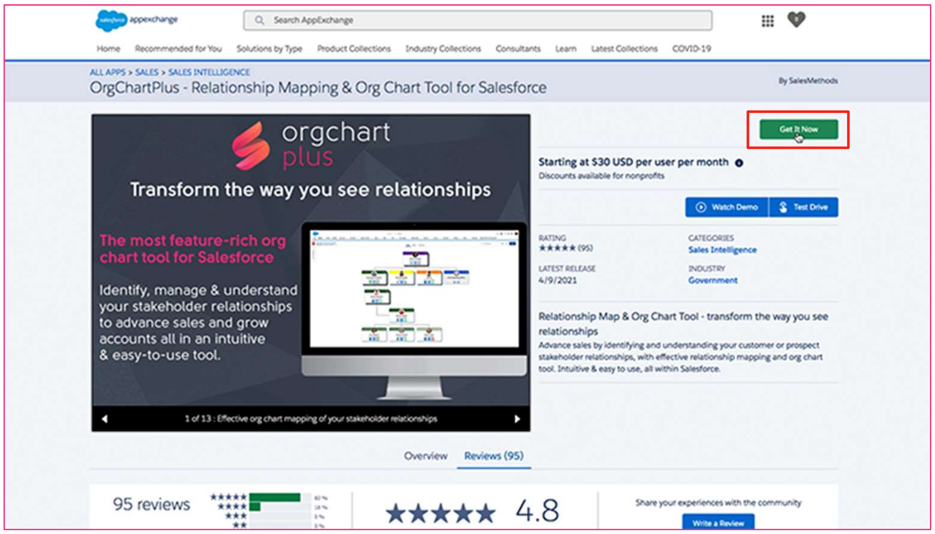
4. **{Edit > Paste}** the domain text into the '**Domain**' field.
5. Ensure that the '**IFrame Type**' picklist has 'Visualforce Pages' selected.
6. Click **[Save]**.

NOTE: If your Org is a mix of Classic and Lightning users, then you will need to switch to the other {Mode} and also add that domain-style URL as a ***Trusted Domain****.*

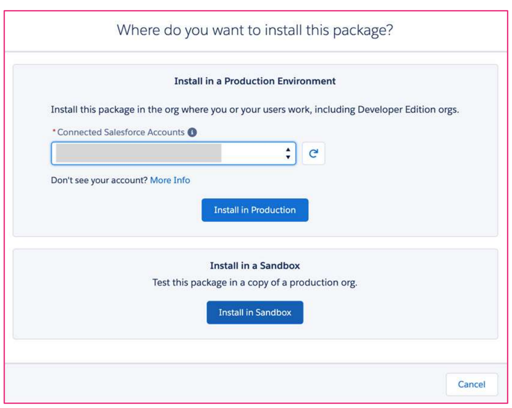
Install OrgChartPlus

1. Click here to download OrgChartPlus from the App Exchange
   https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000004fjGWEAY

2. Click on the **[Get It Now]** button. You can install OrgChartPlus (OCP) into a Sandbox, a Developer org, or a Production org.



3. You will be asked to sign into your Salesforce Trailhead Account, and then asked where you wish to install OCP: in your Production (live) org, or into a Sandbox.



NOTE:

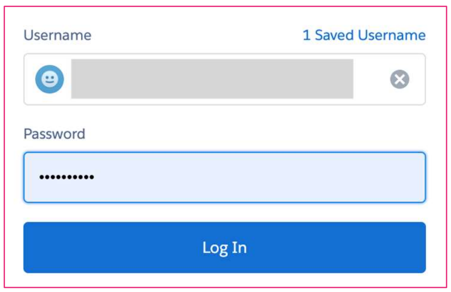
If you are <u>upgrading</u> **OrgChartPlus**, then choose a Salesforce Account and click **[Install in Production]**.

If this is your first installation of **OrgChartPlus**, we recommend you install it into a Sandbox first, so click **[Install in Sandbox]**.

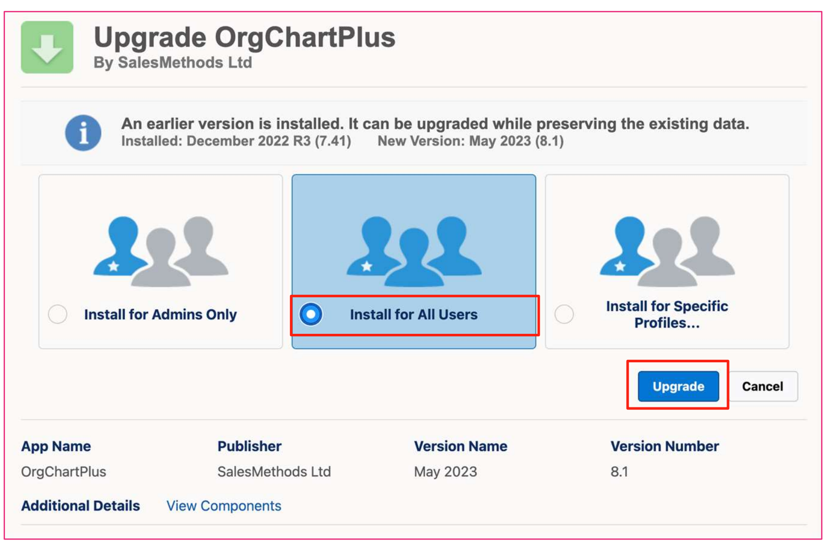
4. Tick to agree the Terms & Conditions, then click **[Confirm and Install]**.

NOTE: If you have already purchased OCP licences IGNORE the 'Free Trial' status in this installation form, your licences will remain in place.

5. You will then be asked to sign into Salesforce. Depending on your choice above use your Production or Sandbox User ID.

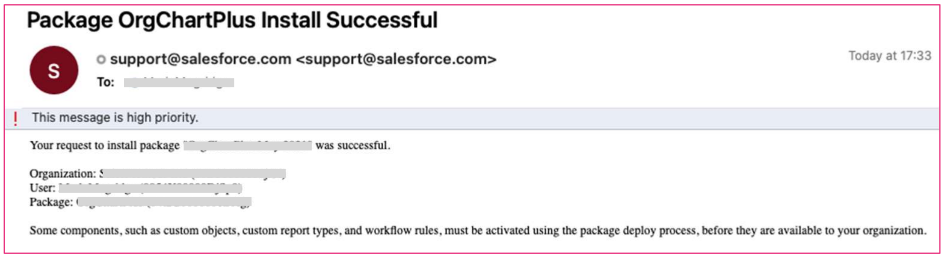


6. We recommend installing for all users. Select "Install for All Users" and click **[Install]/[Upgrade]**. (In the example below we are running an Update on an existing install, so it shows an **[Upgrade]** button).



7. It will sit there for a while as it runs the install/upgrade…

8. And when it is installed and ready to configure, Salesforce will send you an email. Now you can get going with the next part of the setup.



Package OrgChartPlus Install Successful

support@salesforce.com <support@salesforce.com>

Today at 17:33

To:

This message is high priority.

Your request to install package was successful.

Organization:
User:
Package:

Some components, such as custom objects, custom report types, and workflow rules, must be activated using the package deploy process, before they are available to your organization.

Manage Licences

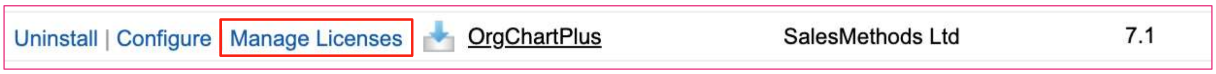
(ONLY APPLIES TO 'PRODUCTION' ORGS – SANDBOXES DO NOT NEED LICENCES)

Note. *Do not be alarmed if the number of licences does not match the number you have purchased. SalesMethods need to manually configure your licence and this can only be done after you have installed your product.*

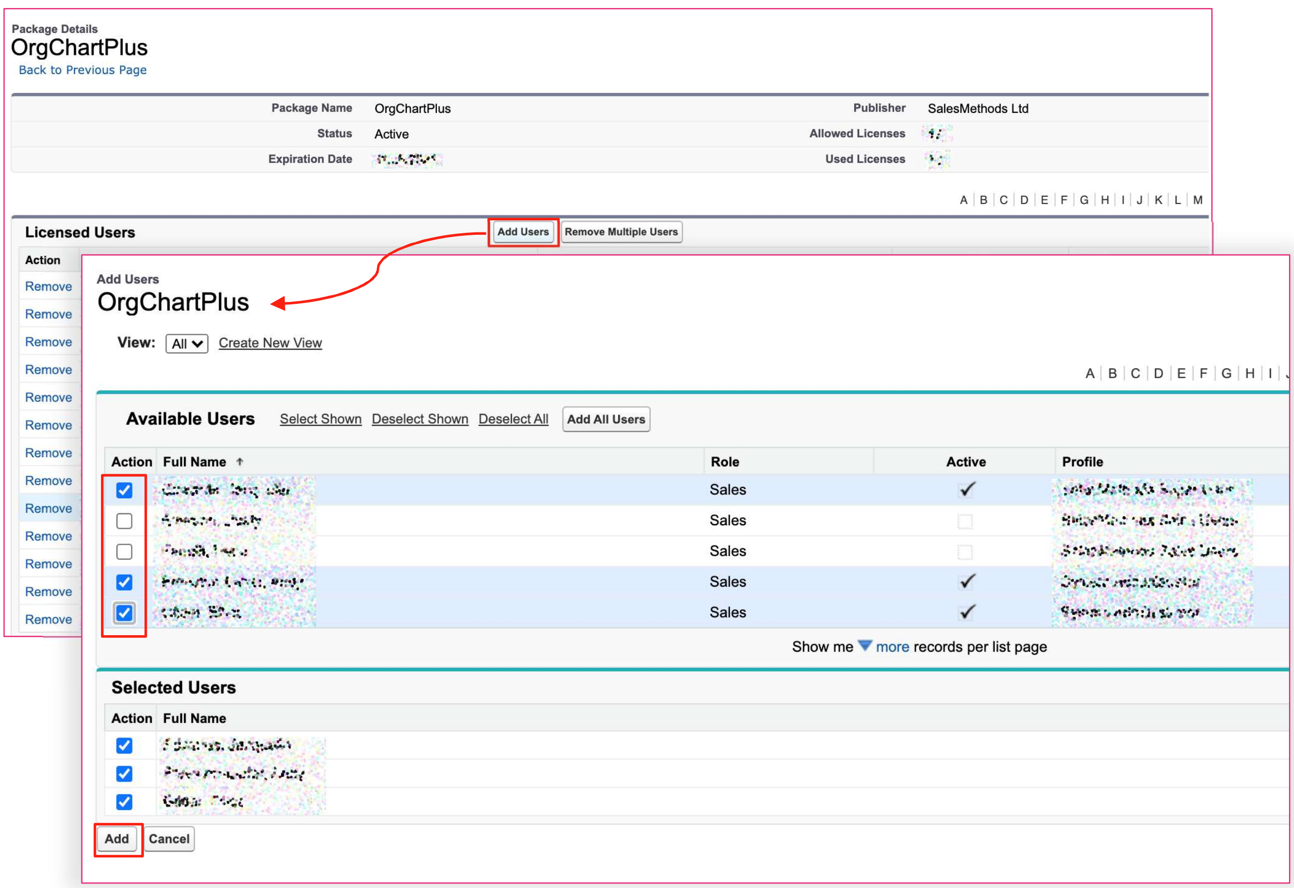
Classic | Setup > Installed Packages

Lightning | Setup > Apps > Packaging > Installed Packages

Find the OrgChartPlus package and click on {**Manage Licences**}.



1. Click the [**Add Users**] button
2. Tick/check the Users in the {**Available Users**} list you wish to access OrgChartPlus,
3. When you have selected all required Users, click the [**Add**] button and the Licenced Users list will be updated...



Configure Profiles

(ONLY APPLIES TO ENTERPRISE AND UNLIMITED EDITIONS OF SALESFORCE)

Now you need to check the access for the Admin and Sales Users.

Classic + Lightning | Setup > Users > Profiles

Note: If you use a 'standard' Profile for your sales Users, you will need to make that a 'custom' Profile so that you can make the changes below…

1. Open the 'standard' Profile, click [View Users] and make a note of all the Users.
2. Then 'back page' and click [Edit] and then click [Clone] and name the new Profile.
3. Then go into each User record and change their Profile to the new one you just created.

1. Go into each Profile that needs access to OrgChartPlus and make sure that the following object permissions are set as follows…

Custom Object Permissions

For Admin Users ONLY…

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Ad Groups	✓	✓	✓	✓	✓	✓
ADP OrgCharts	✓	✓	✓	✓		
ADP OrgChart Entities	✓	✓	✓	✓		
ADP OrgChart Entity Common	✓	✓	✓	✓		
ADP OrgChart Notes	✓	✓	✓	✓		
ADP OrgChart Relationships	✓	✓	✓	✓		
ADP OrgChart TeamMembers	✓	✓	✓	✓	✓	✓
Company Accounts	✓	✓	✓	✓	✓	✓
Contact Intimacies	✓	✓	✓	✓	✓	✓
Google Campaigns	✓	✓	✓	✓	✓	✓
Keywords	✓	✓	✓	✓	✓	✓
MSO OrgCharts	✓	✓	✓	✓		
MSO OrgChart Entities	✓	✓	✓	✓		
MSO OrgChart Entity Common	✓	✓	✓	✓		
MSO OrgChart Notes	✓	✓	✓	✓		
MSO OrgChart Relationships	✓	✓	✓	✓		
MSO OrgChart TeamMembers	✓	✓	✓	✓		
Non-SFDC People	✓	✓	✓	✓		
OCP Customisations	✓	✓	✓	✓		
OCP Templates	✓	✓	✓	✓		
OrgChartPlus Competitors	✓	✓	✓	✓		
Search Phrases	✓	✓	✓	✓	✓	✓
SFGA Version	✓	✓	✓	✓	✓	✓
Text Ads	✓	✓	✓	✓	✓	✓
User Preferred Data For Local Time	✓	✓	✓	✓	✓	✓

For Standard Users…

Custom Object Permissions

Object	Basic Access: Read	Basic Access: Create	Basic Access: Edit	Basic Access: Delete	Data Administration: View All	Data Administration: Modify All
Ad Groups	✓	✓	✓	✓		
ADP OrgCharts	✓	✓	✓	✓		
ADP OrgChart Entities	✓	✓	✓	✓		
ADP OrgChart Entity Common	✓	✓	✓	✓		
ADP OrgChart Notes	✓	✓	✓	✓		
ADP OrgChart Relationships	✓	✓	✓	✓		
ADP OrgChart TeamMembers	✓	✓	✓	✓		
Company Accounts						
Contact Intimacies						
Google Campaigns	✓	✓	✓	✓		
Keywords	✓	✓	✓	✓		
MSO OrgCharts	✓	✓	✓	✓		
MSO OrgChart Entities	✓	✓	✓	✓		
MSO OrgChart Entity Common	✓	✓	✓	✓		
MSO OrgChart Notes	✓	✓	✓	✓		
MSO OrgChart Relationships	✓	✓	✓	✓		
MSO OrgChart TeamMembers	✓	✓	✓	✓		
Non-SFDC People	✓	✓	✓	✓		
OCP Customisations	✓	✓	✓	✓		
OCP Templates	✓					
OrgChartPlus Competitors	✓					
Search Phrases	✓	✓	✓	✓		
SFGA Version	✓	✓	✓	✓		
Text Ads	✓	✓	✓	✓		
User Preferred Data For Local Time						

2. Ensure that these **Visualforce Pages** and **Apex Classes** are ‘enabled’….

Enabled Visualforce Page Access

Visualforce Page Name
OrgChartPlus.ADPOrgChartEmbeddedView
OrgChartPlus.ADPOrgChartView
OrgChartPlus.MSOOrgChartEmbeddedView
OrgChartPlus.MSOOrgChartView2
OrgChartPlus.SMAcceptNewContact

Enabled Apex Class Access

Apex Class Name
OrgChartPlus.SM_OrgChartPlus
OrgChartPlus.SM_OrgChartPlusPage

Upgrading from v5 to OrgChartPlus v8

If you have just upgraded from v5 to v8 there are some new objects and fields that may need their access 'Permissions' to be checked. This applies to the same Profiles you checked in the previous section

Classic + Lightning | Setup > Users > Profiles

1. First we need to check that the new 'Place Holders' fields are read/write.

- Scroll down to '**Field-Level Security'** section in each Profile, and in the 'Custom Field-Level Security' sub-section...

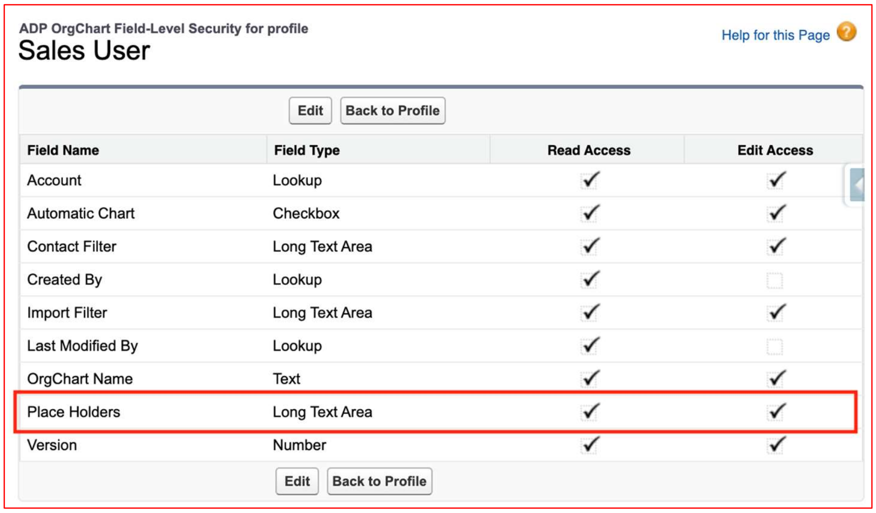
Custom Field-Level Security

Ad Group	[View]	MSO OrgChart Entity Common	[View]
ADP OrgChart	[View]	MSO OrgChart Note	[View]
ADP OrgChart Entity	[View]	MSO OrgChart Relationship	[View]
ADP OrgChart Entity Common	[View]	MSO OrgChart TeamMember	[View]
ADP OrgChart Note	[View]	Non-SFDC Person	[View]
ADP OrgChart Relationship	[View]	OCP Customisation	[View]
ADP OrgChart TeamMember	[View]	OCP Template	[View]
Company Account	[View]	OrgChartPlus Competitor	[View]
Contact Intimacy	[View]	Search Phrase	[View]
Google Campaign	[View]	SFGA Version	[View]
Keyword	[View]	Text Ad	[View]
MSO OrgChart	[View]	User Preferred Data For Local Time	[View]
MSO OrgChart Entity	[View]		

- Click on [View] for **ADP OrgChart**, **ADP OrgChart Note**, **MSO OrgChart**, and **MSO OrgChart Note** objects and ensure that the Read/Edit permissions are ticked for the 'Place Holders' field in each object...

continued on next page...

Custom Object Permissions, continued



ADP OrgChart Field-Level Security for profile

Sales User

Help for this Page

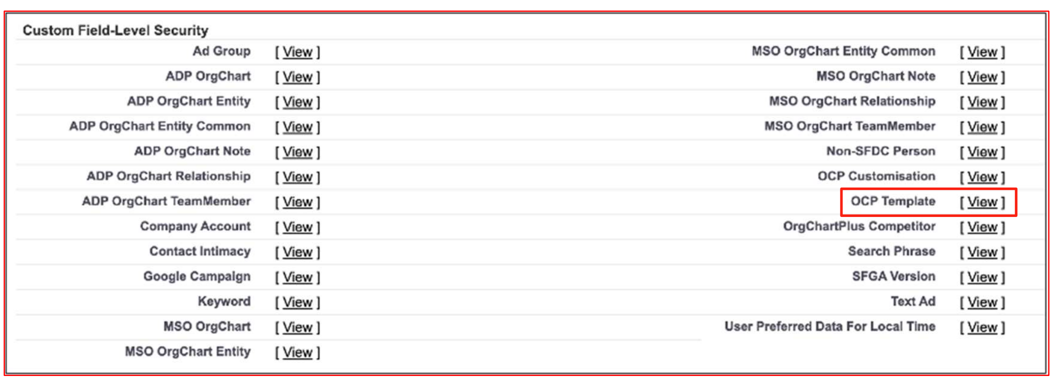
Edit | Back to Profile

Field Name	Field Type	Read Access	Edit Access
Account	Lookup	✓	✓
Automatic Chart	Checkbox	✓	✓
Contact Filter	Long Text Area	✓	✓
Created By	Lookup	✓	
Import Filter	Long Text Area	✓	✓
Last Modified By	Lookup	✓	
OrgChart Name	Text	✓	✓
Place Holders	Long Text Area	✓	✓
Version	Number	✓	✓

Edit | Back to Profile

2. Next we need to make sure the new '**OCP Template**' fields are readable for all Users and writable for Admin Users.

- Find the '**OCP Template**' Object listed under "Custom Field-Level Security"...



Custom Field-Level Security

Ad Group	[View]	MSO OrgChart Entity Common	[View]
ADP OrgChart	[View]	MSO OrgChart Note	[View]
ADP OrgChart Entity	[View]	MSO OrgChart Relationship	[View]
ADP OrgChart Entity Common	[View]	MSO OrgChart TeamMember	[View]
ADP OrgChart Note	[View]	Non-SFDC Person	[View]
ADP OrgChart Relationship	[View]	OCP Customisation	[View]
ADP OrgChart TeamMember	[View]	OCP Template	[View]
Company Account	[View]	OrgChartPlus Competitor	[View]
Contact Intimacy	[View]	Search Phrase	[View]
Google Campaign	[View]	SFGA Version	[View]
Keyword	[View]	Text Ad	[View]
MSO OrgChart	[View]	User Preferred Data For Local Time	[View]
MSO OrgChart Entity	[View]		

- Click on **[View]** for both '**OCP Template** and then ensure the relevant boxes are ticked ...

continued on next page...

For **All Users**: ensure that the **Read** permissions are ticked.

For **Admin Only**: ensure that the **Edit** permissions are also ticked.

OCP Template Field-Level Security for profile

Sales User

Help for this Page

Edit | Back to Profile

Field Name	Field Type	All Users Read Access	Admin Only Edit Access
Auto Match	Long Text Area	✓	✓
Created By	Lookup	✓	
Custom Object Prefix	Text	✓	✓
Default	Checkbox	✓	✓
Id	Auto Number	✓	
JSON	Long Text Area	✓	✓
Last Modified By	Lookup	✓	
Owner	Lookup	✓	✓
Template Label	Text	✓	✓

Edit | Back to Profile

3. To hide the v5.x '**OrgChartPlus Config**' Tab (Classic) and display the v8.x '**OrgChartPlus Configuration**' Tab (Lightning).

- Scroll down to the next section, **Custom Tab Settings.** Check the visibility settings of the '**OrgChartPlus Config**' and '**OrgChartPlus Configuration**' Tabs…

Custom Tab Settings

For Admin Users ONLY…

Local Time Settings	Default On
OrgChartPlus Config	Tab Hidden
OrgChartPlus Configuration	Default On
Smart List	Default On

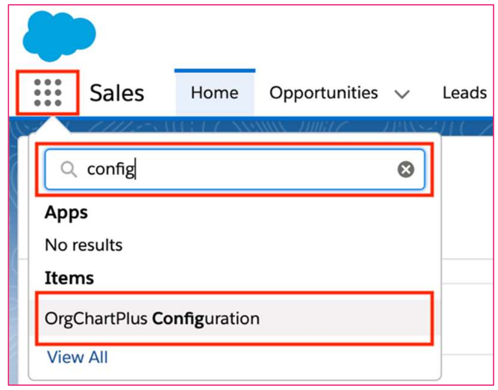
For All Other Users…

Local Time Settings	Default On
OrgChartPlus Config	Tab Hidden
OrgChartPlus Configuration	Tab Hidden
Smart List	Default On

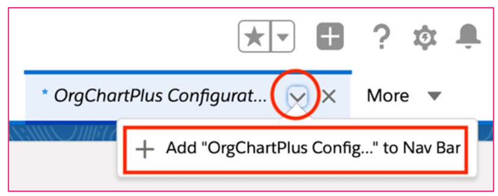
Adding the OrgChart Configuration Tab

Lightning Orgs can add the ‘**OrgChartPlus Configuration**’ Tab to the Admin Users Navigation Bar.

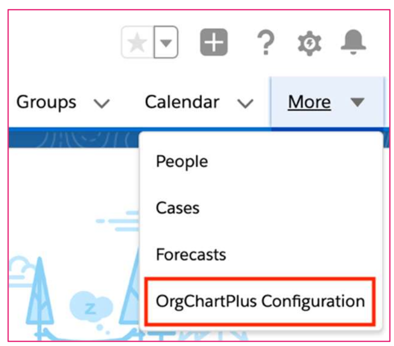
- Click on the ‘App’ menu (9 grey dots)
- Type “Config” in the search box
- Select ‘**OrgChartPlus Configuration**’



- The Tab will appear on the Nav Bar
- Click the {▼ icon} in the new ‘**OrgChartPlus Configuration**’ Tab
- And select the **{+ Add “OrgChartPlus Configuration” to the Nav Bar}** option



- The **“OrgChartPlus Configuration”** Tab will remain permanently in your Nav Bar



The OrgChartPlus Icons

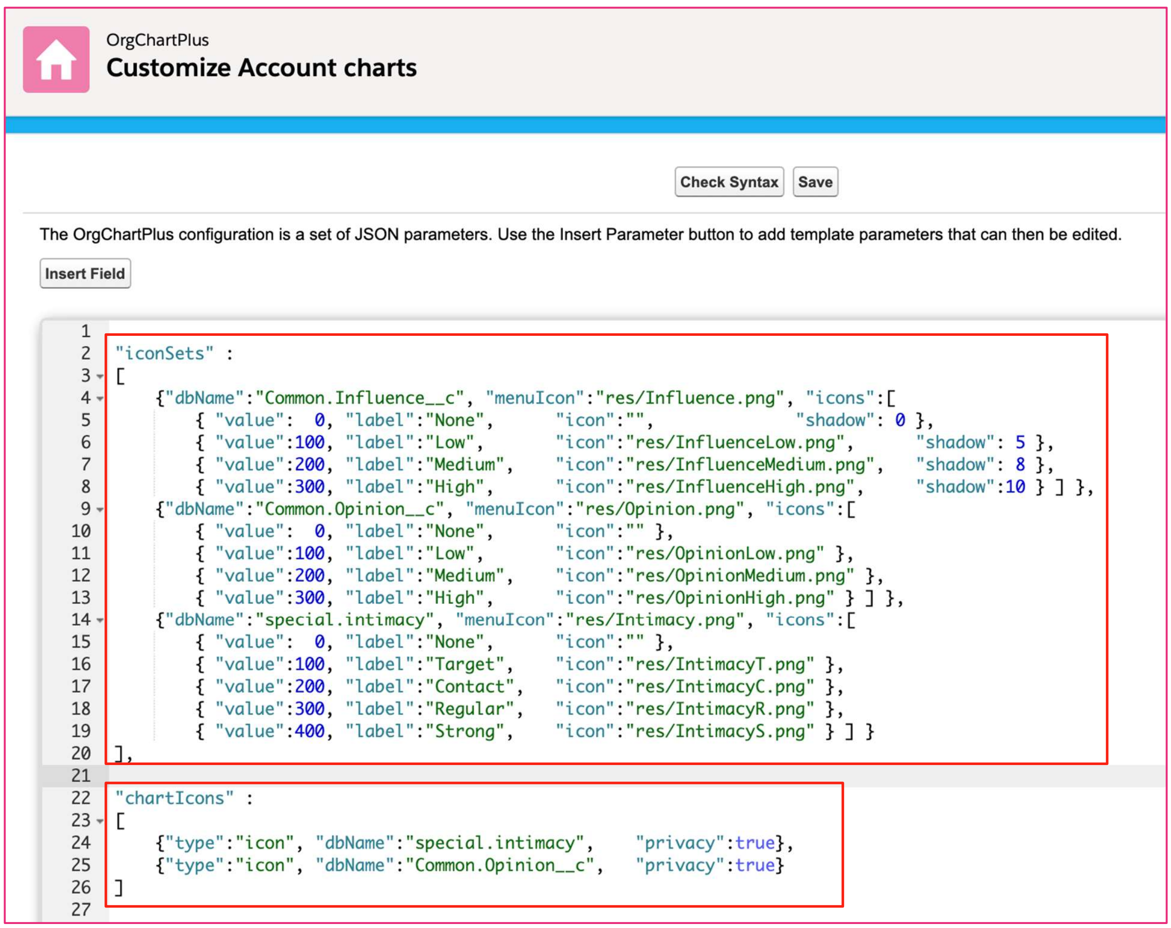
You need to be aware that the Influence, Opinion and Intimacy S icons meet Salesforce Lightning standards by being of SVG format and 20x20 pixels in size.

NO ACTION REQUIRED

If your Organisation has **NOT** specified any "iconSets" or "chartIcons' in any of your **OrgChartPlus Configuration** customisations, then you don't need to make any changes, the v8 upgrade will have handled everything for you.

ACTION REQUIRED

If you **HAVE** specified "iconSets" or "chartIcons' in any of your **OrgChartPlus Configuration** customisations, see the code below, then you need to make the changes yourself. (We will never overwrite your code!)



The OrgChartPlus Icons continued...

To 'point' your Charts to the icons, simply use the following code in your **OrgChartPlus Configurations**.

The SVG images for the "iconSets" parameters are ...

```
"iconSets" :
[
    {"dbName":"Common.Influence__c", "menuIcon":"res/Influence.png", "icons":[
         { "value":  0, "label":"None",   "icon":"",                         "shadow": 0 },
         { "value":100, "label":"Low",    "icon":"res/InfluenceLow.svg",     "shadow": 5 },
         { "value":200, "label":"Medium", "icon":"res/InfluenceMedium.svg","shadow": 8 },
         { "value":300, "label":"High",        "icon":"res/InfluenceHigh.svg",
    "shadow":10 } ] },

    {"dbName":"Common.Opinion__c", "menuIcon":"res/Opinion.png", "icons":[
         { "value":  0, "label":"None",        "icon":"" },
         { "value":100, "label":"Low",         "icon":"res/OpinionLow.svg" },
         { "value":200, "label":"Medium",      "icon":"res/OpinionMedium.svg" },
         { "value":300, "label":"High",        "icon":"res/OpinionHigh.svg" } ] },

    {"dbName":"special.intimacy", "menuIcon":"res/Intimacy.png", "icons":[
         { "value":  0, "label":"None",        "icon":"" },
         { "value":100, "label":"Target",      "icon":"res/IntimacyT.svg" },
         { "value":200, "label":"Contact",     "icon":"res/IntimacyC.svg" },
         { "value":300, "label":"Regular",     "icon":"res/IntimacyR.svg" },
         { "value":400, "label":"Strong",      "icon":"res/IntimacyS.svg" } ] }
],
```

An **Influence** icon is included the "chartIcon" parameter...

```
"chartIcons" :
[
       {"type":"icon",     "dbName":"special.intimacy",      "privacy":true},
       {"type":"icon",     "dbName":"Common.Influence__c",   "privacy":true},
       {"type":"icon",     "dbName":"Common.Opinion__c",     "privacy":true}
],
```

View OrgChartPlus in Salesforce

Add OrgChartPlus Buttons & Actions to the layouts

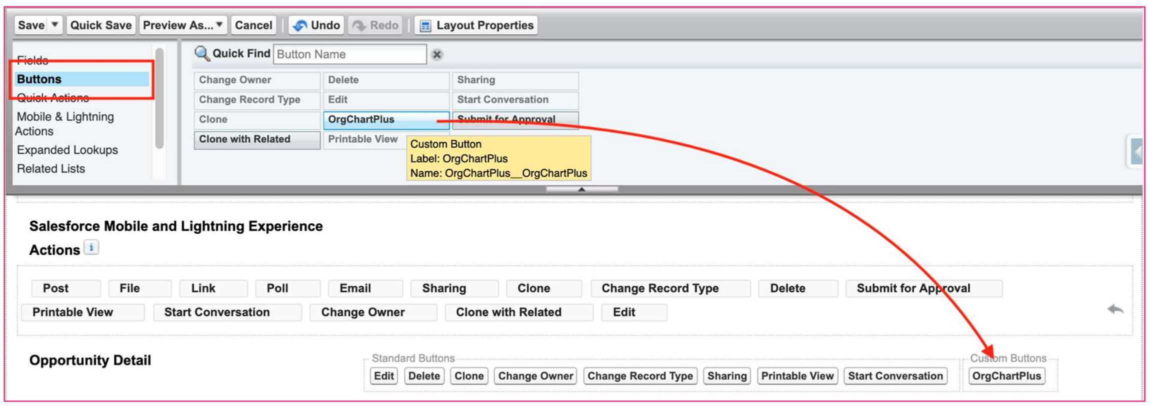
To view OrgChartPlus in full screen mode, add this Button or Action…

Classic | Setup > Customize > Opportunity > Page Layouts

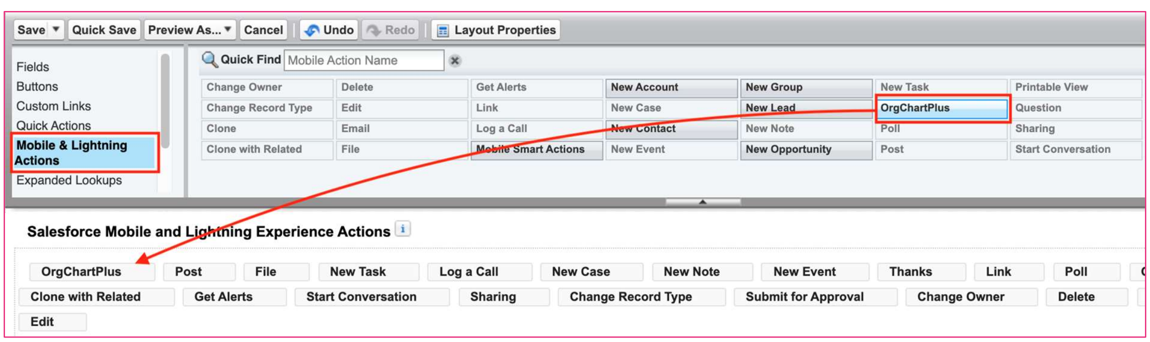
Lightning | Setup > Objects & Fields > Object Manager > Opportunity > Page Layouts

1. [Edit] the relevant [Opportunity] layout.

2. Classic | Select {Buttons} and then drag the {OrgChartPlus} button to the {Custom Buttons} box at the top of the Opportunity page.



3. Lightning | Select {Mobile & Lightning Actions} and then drag the {OrgChartPlus} action from the section into the 1st position in the {Mobile & Lightning Experience Actions} so the tool is readily available in Lightning.



4. Click [Save]

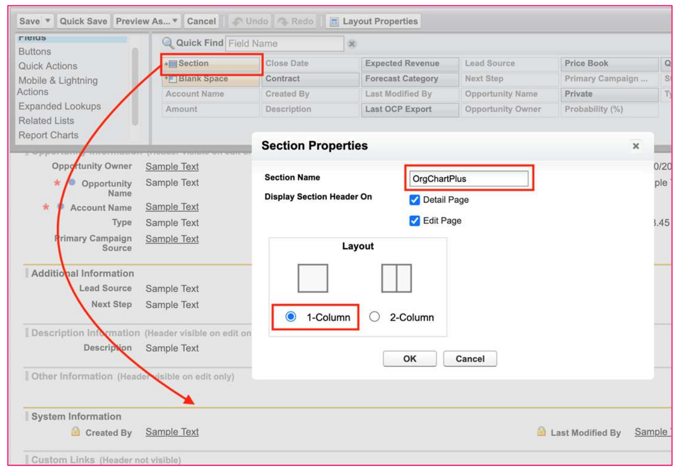
5. Repeat the process for the [Account] page layout.

Classic | Embedding OrgChartPlus into a Page Layout

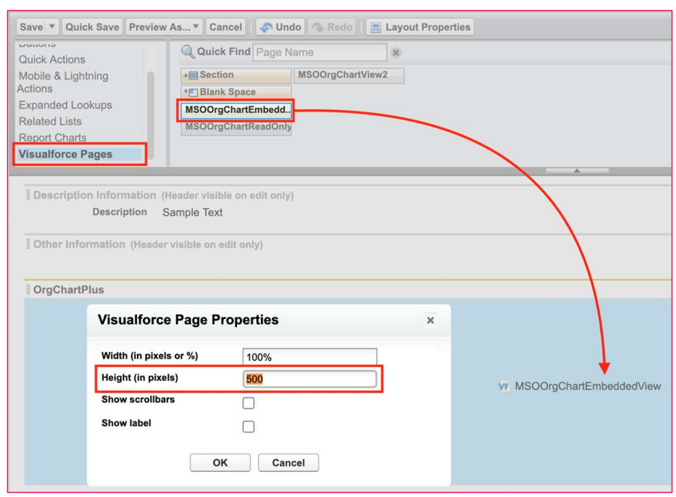
You can also put OrgChartPlus onto the page layout itself rather than having to use the button to navigate to the tool. This layout is often preferred by the Users as it is immediately visible and more ‘intuitive.’ Follow this process for both the [Opportunity] and [Account] objects…

Classic | Setup > Customize > Opportunity > Page Layouts

- Click [Edit] on the relevant **[Opportunity]** Page Layout.
- Drag down a new **{Section}** into the Page Layout.
- Name it ‘OrgChartPlus.’
- Make it **1-Column wide.**
- Click **[OK]** and then **[Save]**



- Click ‘**Visualforce Pages**.’
- Drag **{MSOOrgChartEmbeddedView}** into the new OrgChartPlus **{Section}**.
- Set the height between **500-700 pixels.** Click **[OK] [Save]**



continued on next page…

Classic | Setup > Customize > Account > Page Layouts

1. Repeat the above process with the relevant **[Account]** Page Layout. The only difference is you will drag/drop the {**ADPOrgChartEmbeddedView**} Visualforce Page into the new [Account] [**Section**].

Lightning | Embedding OrgChartPlus within a Lightning Record Page

To view OrgChartPlus on a Lightning Record Page you have 3 options:

1. Embed it within the standard Page Layout,
   OR
2. Add it as a {**Lightning Section**} within the Lightning Record Page,
   OR
3. Add it as new {**Lightning Tab**} within the Lightning Record Page.

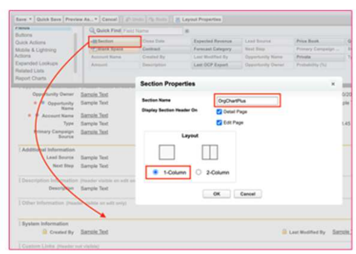
OPTION 1: Embed it within the standard Page Layout.

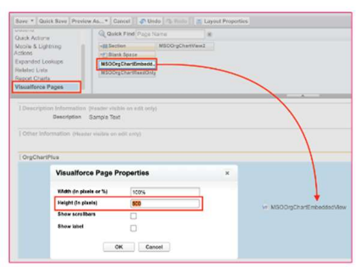
See preceding pages for instructions: **"Classic | Embedding OrgChartPlus into a Page Layout"**

Following these, OrgChartPlus will show in the {**Detail**} area of the Lightning Record Page.

Classic | Setup > Customize > Opportunity > Page Layouts

- Click [Edit] on the relevant **[Opportunity]** Page Layout.
- Drag down a new {**Section**} into the Page Layout.
- Name it 'OrgChartPlus.'
- Make it **1-Column wide**.
- Click [**OK**] and then [**Save**]





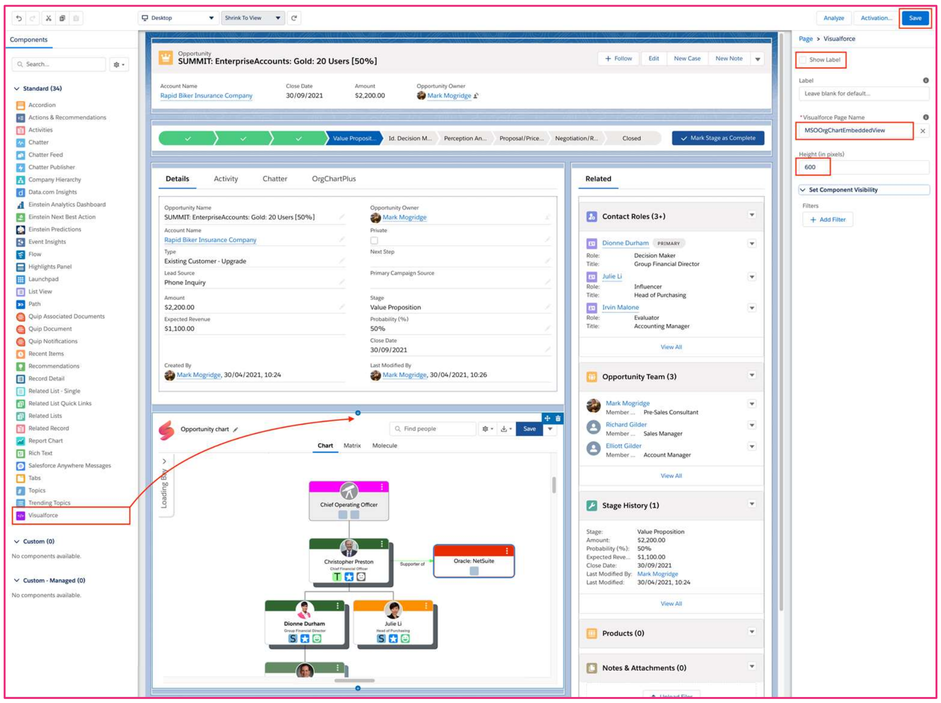
- Click '**Visualforce Pages**.'
- Drag {**MSOOrgChartEmbeddedView**} into the new OrgChartPlus {**Section**}.
- Set the height between **500-700 pixels**. Click [**OK**] [**Save**]

OPTION 2: Add it as a {**Lightning Section**} within the Lightning Record Page.

Lightning | Setup > Objects & Fields > Object Manager > Opportunity > Lightning Record Pages

To add a new {Lightning Section} on Opportunity record page

1. Select the relevant [**Opportunity**] record page and click [**Edit**]
2. In the left-hand panel you will see a list of Components…
   - Drag the {**Visualforce**} component into an area of the widest column. (In the example, we chose the area at the foot of the {**Detail**} Tab.)



   - In the right-hand panel, untick {**Show Label**}
   - Select {**MSOOrgChartEmbeddedView**} from the {**Visualforce Page Name**} picklist
   - Set the height between **600-800 pixels**
   - Click [**Save**] [**Activate**] [**<-Back**]

To add a new {Lightning Section} on Account record page

Lightning | Setup > Objects & Fields > Object Manager > Account > Lightning Record Pages

1. Repeat the above process with the relevant [**Account**] Page Layout
2. Except that this time you select the {**ADPOrgChartEmbeddedView**} Visualforce Page into the new [Account] [**Section**].

OPTION 3: Add it as a {**Lightning Tab**} within the Lightning Record Page.

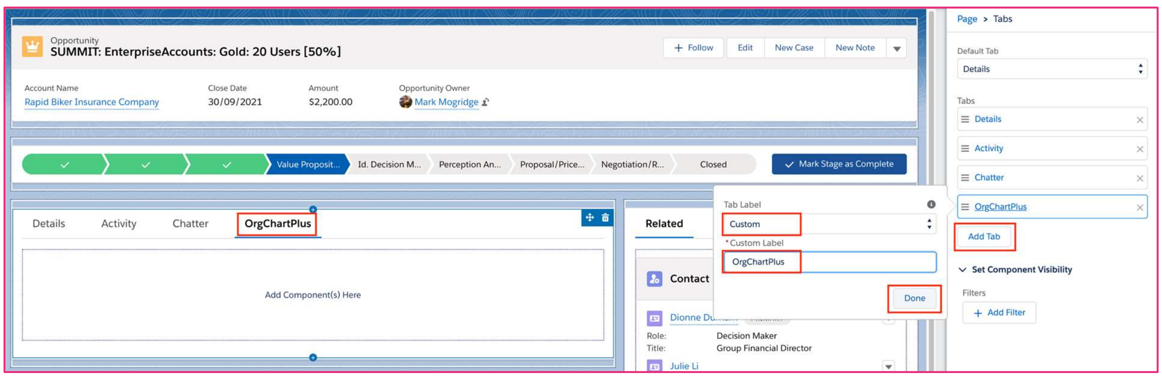
Lightning | Embedding OrgChartPlus: {Lightning Tab}

Lightning | Setup > Objects & Fields > Object Manager > Opportunity > Lightning Record Pages

To add a new {Lightning Tab}

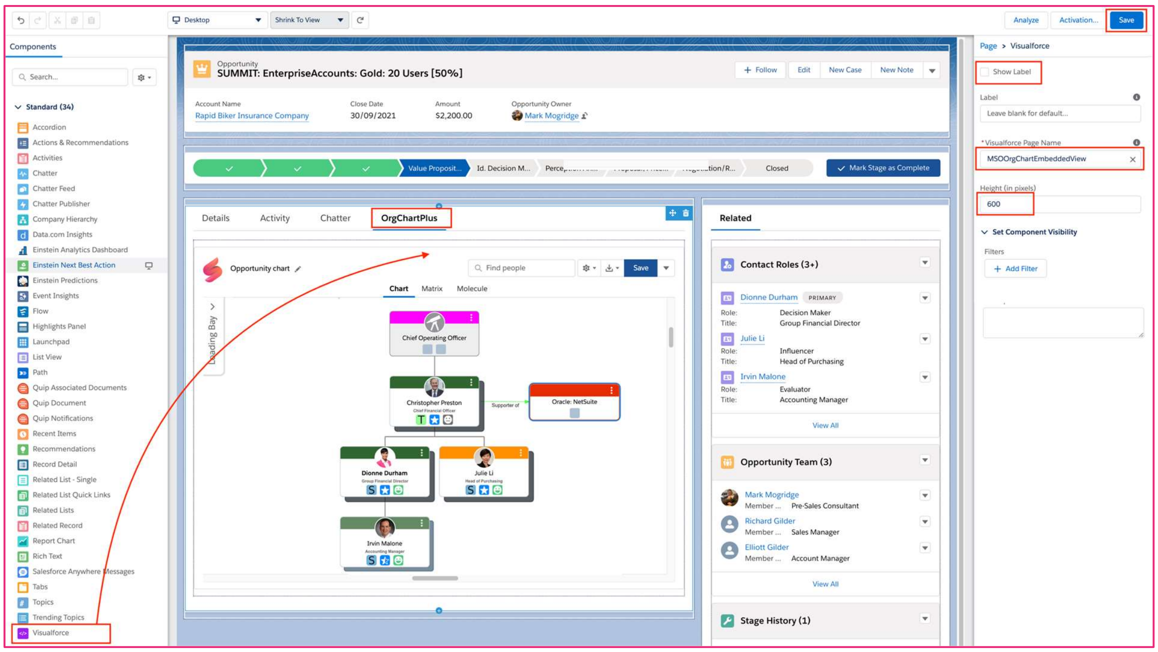
1. Select the relevant [**Opportunity**] record page and click [**Edit**]

2. Click on the Tab Bar of the main page area, in the right-hand panel you'll see the list of Tabs…
   - Click on the [**Add Tab**] button
   - Select '**Custom**' from the top of the {**Tab Label**} picklist
   - Type in "**OrgChartPlus**" in the {**Custom Label**} field, click [**Done**]



Continued on the next page…

3. In the left-hand panel you will see a list of Components…
   - Drag the {**Visualforce**} component into the new Tab area
   - Now go to the right-hand panel and Untick {**Show Label**}
   - Select {**MSOOrgChartEmbeddedView**} from the {**Visualforce Page Name**} picklist
   - Set the height between **600-800 pixels**, click [**Save**] [**Activate**] [**<-Back**]



Lightning | Setup > Objects & Fields > Object Manager > Account > Lightning Record Pages

1. Repeat the above process with the relevant **[Account]** Page Layout
2. Except that this time you select the {**ADPOrgChartEmbeddedView**} Visualforce Page into the new [Account] [**Section**].

OrgChartPlus is ready to use

You should read the following section on configuring OrgChartPlus and you should also read the Administration on-line help which is available from any of the configuration pages.

Your sales users will now see the OrgChartPlus button in their Opportunity and Account layouts. Users are encouraged to watch the on-line training videos at https://salesmethods.com/orgchartplus-training-video/ to understand how to use the product.

Configuring OrgChartPlus

Open the OrgChartPlus Configuration page

Lightning | App > OrgChartPlus Configuration

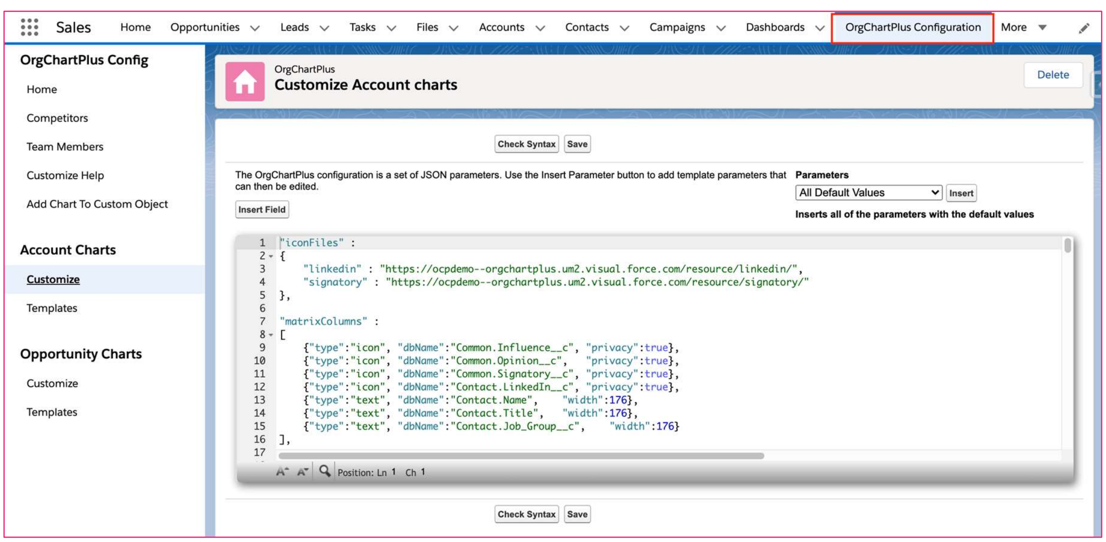
We previously added the {OrgChartPlus Configuration} page to the Admin's Navigation Bar in the instructions above, so simply click on that navigation item.

Classic | Setup > Installed Packages

- Click the {Config} link for the OrgChartPlus Package...

From this page you will be able to modify and customise...

- Lists of Team Members
- Lists of Competitors
- The Help Content
- Adding OrgCharts to Custom Objects
- Customising every component within an [Account] or [Opportunity] OrgChart
- Building Templates within an [Account] or [Opportunity] OrgChart



Configure Team Members

There are three sources of Team Members...

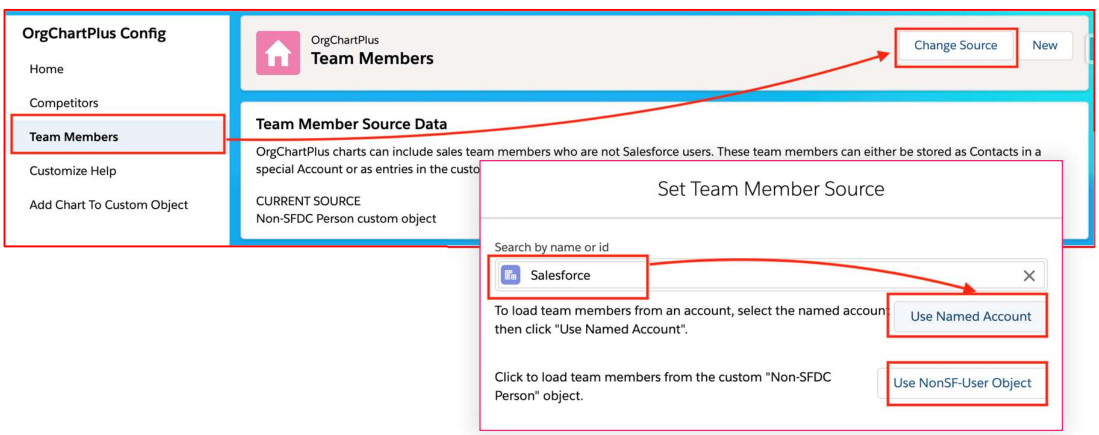
1. All Salesforce Users [accessed by default]
2. Contacts within a specified {Named Account}
3. {Non-SFDC Persons} are contacts that are not otherwise listed in Salesforce

And you use the combination of all three sources to build your Team.

The OrgChartPlus tool holds information about the people in a sales team. These people can be drawn from the Salesforce Users list and also a list of non-Salesforce users. You can choose where these users are stored; either as Contacts in a special Account or in the custom object 'Non-SFDC Person'.

You need to make this choice before adding any non-Salesforce users.

1. Click the {Team Members} menu
2. Click the [Change Source] button, and from here you can choose between the two data sources



3. To use Contacts from a **{Named Account}**, search for and select the Account in the search box and click the **[Use Named Account]** button.

   To add a **{Non-SFDC Person}** click the **[Use NonSF-User Object]** button and then click on the **[New]** button at the top right of the screen, add the name and click **[Save]**.

4. Both of these data-sources will now be available when you add Team Members with an OrgChart.

NOTE: You can also use the native Salesforce feature of…

'**Account Teams**' at Account level

https://help.salesforce.com/articleView?id=sf.accountteam_add.htm&type=5

and

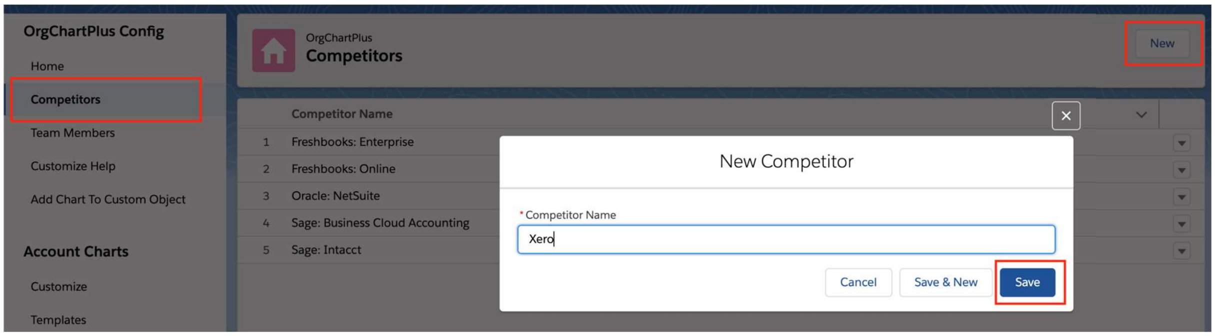
'**Opportunity Teams**' at Opportunity level

https://help.salesforce.com/articleView?id=sf.salesteam_add.htm&type=5

to auto load pre-saved Teams when creating a new Chart.

Add Competitors

The OrgChartPlus tool can be used to track the relationships between competitors and contacts. The list of competitors is held globally in your Salesforce org rather than per Account or Opportunity. Your sales team will ask you to add the competitors they encounter.

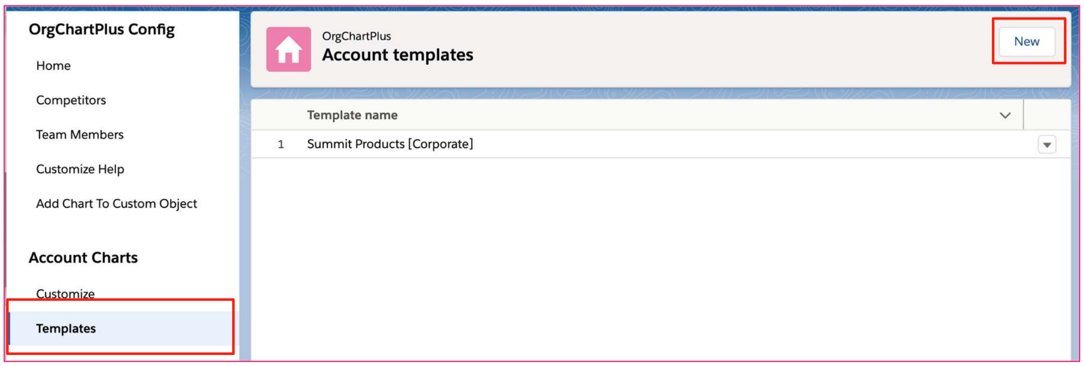


1. Open the Competitors tab from the list of tabs.
2. Click [New] to add the name of a competitor.
3. Save and close.

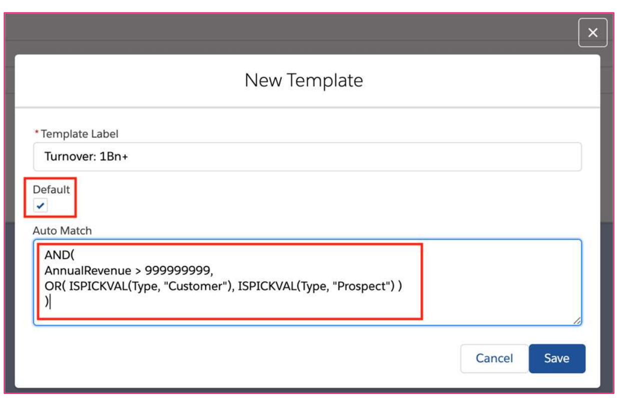
Creating Placeholder Templates

Templates are a collection of Placeholders. Placeholders determine the pre-set hierarchy of the decision makers within an Account or Opportunity.

1. To create a new Template ...
    - Open OrgChartPlus Configuration, in the left-hand menu, select either...
      Account Charts > Templates
      Opportunity Charts > Templates
    - Click [New]



    - Enter a name for the template.
    - To make the template the default choice for users, check the 'Default' checkbox.
    - You can set the auto-matching criteria for a Template using a [Salesforce Formula]() in the 'Auto Match' field, such as a combination of Turnover, Industry, Business Type, Geography or any custom criteria you wish.
    - Click [Save]



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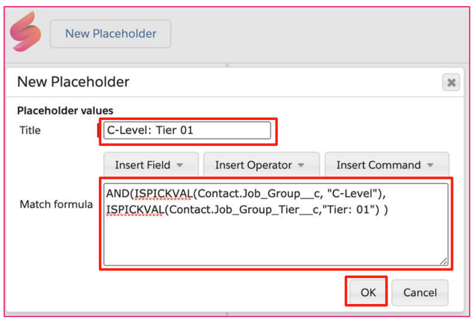
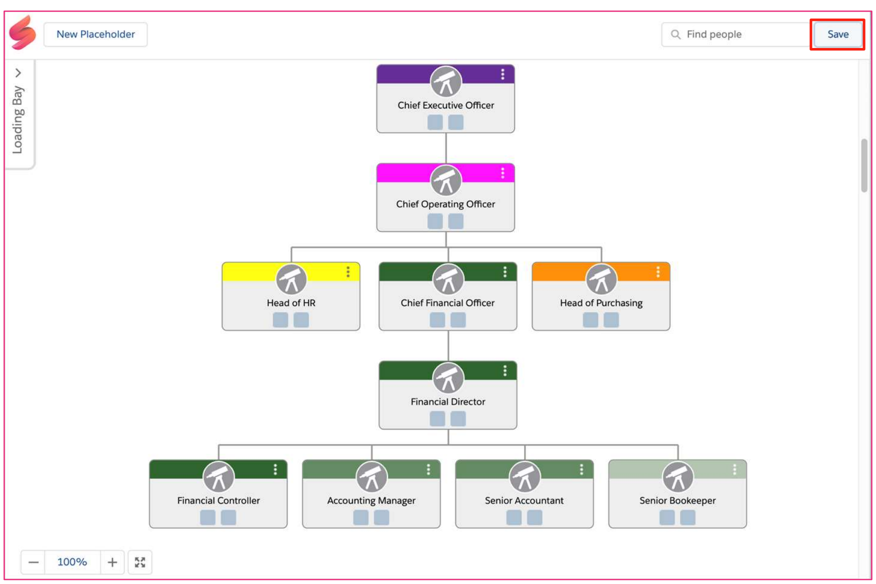
Creating Placeholder Templates continued…

2. To add the Placeholders to the Template…
    - Click the ▼ drop-down option to the right of the new template entry and click "Define template".

- Click [**New Placeholder**] to create a placeholder.
- Enter the 'Title' and a Salesforce Formula in the 'Match formula' field to identify which Contacts will qualify for this role in the hierarchy. Click [**OK**]



3. Positioning the Placeholders into a hierarchy …
    - Move each new Placeholder from the '**Loading Bay**' and position them in the required reporting hierarchy. Remember to click [**Save**].



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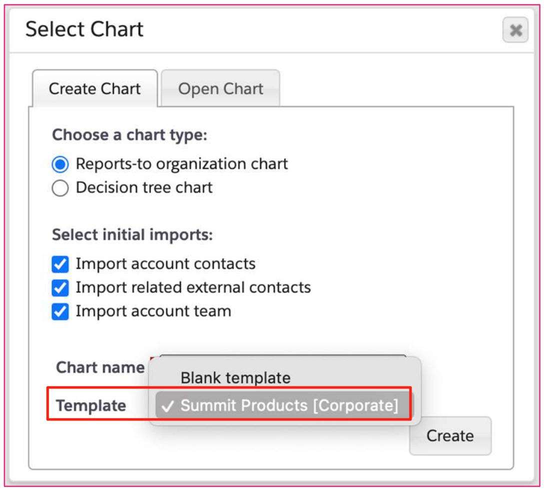
Creating Placeholder Templates continued…

4. Using the Template to create new OrgCharts
   - When you create a New OrgChart for an Account or Opportunity simply select the relevant Template from the picklist.
   - The selection of Templates will be limited to those that match the 'Auto-Match' formula.



5. Template & Placeholder Formulas

The Auto-Match/Match Formula rules use the standard Salesforce formula logic, operators and functions and the full listing of these can be found here …
https://help.salesforce.com/articleView?id=customize_functions.htm&type=5

a. Template formulas: The Templates can be auto-allocated based on Turnover, Industry, Business Type and Geography criteria to suit your organisation's differing sales processes. For example:

```
AND(AnnualRevenue > 999999999, OR( ISPICKVAL(Type, "Customer"),
ISPICKVAL(Type, "Customer") ) )
```

b. Placeholder formulas: The optimum approach is to define both the Contact's job 'role' and 'seniority' so that you can allocate the Contacts into the correct position within the hierarchy. For example:

```
AND(ISPICKVAL(Contact.Job_Group__c, "C-Level"),
ISPICKVAL(Contact.Job_Group_Tier__c,"Tier: 01") )
```

Customizing OrgChartPlus

The following guides provide Salesforce Administrators with more customisation options for OrgChartPlus.

OrgChartPlus Parameterisation Guide – how to further configure OrgChartPlus for their Organisation's needs

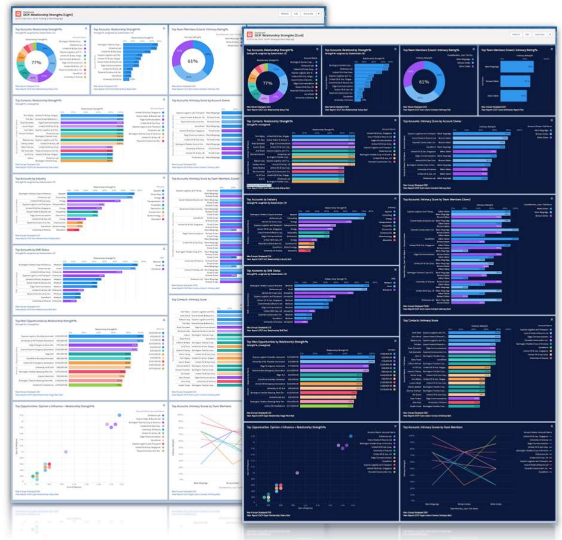
OrgChartPlus Social Media - how to add images to the OrgChartPlus Chart.

OrgChartPlus Dashboards & Charts Relationships - how to download and install the OrgChartPlus Dashboards & Charts Package.

You can download copies of these documents from our website...
https://salesmethods.com/customers/user-guides/

OrgChartPlus Dashboards & Charts Package

You can 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 knowledge at record level.

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

Production...
https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4L000000ci35

Sandbox...
https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4L000000ci35

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.

sales methods