Mindjet

Deal Navigator™

Organization charts automatically created and easily modified, within salesforce.com®

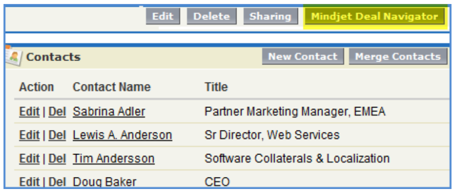
User Quick Start Guide

Mindjet Deal Navigator reveals essential relationships within accounts from a single org chart. Evaluate opportunities at a glance using visual indicators that illustrate contact roles and more. See who matters and the actions needed to drive your business.

Start accelerating your sales cycle with Mindjet Deal Navigator today using these three easy steps.

STEP 1: CREATE YOUR ORG CHART

Creating an org chart is as simple as clicking the Mindjet Deal Navigator button or custom link within any Salesforce.com account, opportunity or contact record.



Use drag and drop and edit features to update the reporting structure and contacts for your org chart.

Editing a Reporting Structure

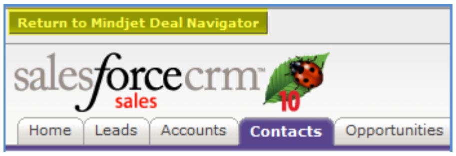
- To change a reporting relationship, click on the contact you want to realign
- Drag the contact to the correct position in the reporting structure
- Drop the contact
- The change is automatically recorded in the salesforce.com contact record

Filtering a Reporting Structure

- Click 'Tag' in the top tool bar
- Type in your desired contact criteria and click on 'Search'
- Check the boxes on the left to select the contacts you want to see in the org chart
- Click on Tag As Relevant to tag the contacts
- Repeat searching and tagging for additional contacts
- Ensure that the "Show only relevant contacts on close" box is checked
- Click on 'Close' to see the new chart showing only the tagged contacts.

Editing Contacts

- Highlight a contact you need to edit
- Click 'Edit' in the top tool bar
- Type the missing or incorrect contact information into Salesforce.com



- Hit save to ensure your changes are captured
- Click the "Return to Mindjet Deal Navigator" button in the upper left

Adding New Contacts

- To add a new contact, click on the individual to whom they will be reporting
- From the top tool bar click 'New'
- Click Contact and hit 'Ok'
- Enter the contact's information in the SFDC contact form record
- Click 'Save' to record

STEP 2: NAVIGATING YOUR ORG CHARTS

Creating workable org charts lets you quickly evaluate the status of your deal and determine next steps. Understanding the path from your champion to the decision maker is as simple as labeling your contacts with relevant opportunity information and then filtering on opportunity.

Adding Opportunities and Contact Roles

- Highlight the contact
- From the top tool bar choose Opportunity
- From the 'Opportunity' drop down, scroll over the appropriate Opportunity to see Contact Roles
- Choose the appropriate contact role(s) Note: Contacts may be involved in multiple opportunities, and all can be listed
- The Contact Role for each Opportunity will appear in the chart and be recorded in the contact record

Filtering Opportunities and Contact Roles

- From the top tool bar, click on 'Filter'
- To see all opportunities at all stages, select "All" from the drop-down
- Choose the appropriate Opportunity by clicking on that box
- Your chart will be filtered so that only contacts assocated with that Opportunity will be displayed

Unfilter Opportunities and Contact Roles

- From the top tool bar, click the 'Show All' button
- Your chart will unfilter showing all contacts

STEP 3: CREATING INTELLIGENT ORG CHARTS

The magic of Deal Navigator is revealed when you begin understanding the relationships between your account contacts. Knowing that Contact 1 is a close advisor for Contact 2 gives you just the right information to begin building that relationship and working within your network more effectively and intelligently.

Drawing Relationships between Contacts

- From the top tool bar click on 'Insert' to reveal the drop down for relationships, comments and boundaries
- Choose 'Relationship' from the list
- Clicking on the first contact in the relationship will reveal the relationship line
- Scroll to the second contact and click on that contact
- To revise the relationship line shape simply click on the yellow squares and drag the line to your chosen shape

Adding Comments to Relationships and Contacts

- Click on the contact or relationship line where a comment is needed
- From the top tool bar click on 'Insert' to review the comments drop down
- Choose 'Comment'
- Click in the 'Comment' box to type your remarks

"Easy access to actionable data is critical for sales success. Mindjet Deal Navigator transforms the account mapping process with the click of a button."

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