Mindjet

Deal Navigator

Mindjet Deal Navigator

Version 2.4.279

Release Notes: May 20th, 2011

Mindjet Deal Navigator Build 2.4.279 Updates

Currently Supported Operating Systems and Browsers: Mindjet Deal Navigator 2.4.279

Operating System	Browser Version
Microsoft® Windows 7	• Microsoft Internet Explorer 8 • Firefox 3.5 and above • Google Chrome 11
Microsoft® Windows Vista	• Microsoft Internet Explorer 7 and 8 • Firefox 3.5 and above • Google Chrome 11
Microsoft® Windows XP	• Microsoft Internet Explorer 7 and 8 • Firefox 3.5 and above • Google Chrome 11
Mac OS X 10.x or greater	• Safari 5.0 • Firefox 3.5 and above • Google Chrome 11

Recent Enhancements for Mindjet Deal Navigator Build 2.4.279

Enhancement: Support for larger multi-account hierarchy

Key Benefits: Mindjet Deal Navigator will handle multi-account org charts containing up to 500 accounts. This allows opportunity tracking within complex account structures.

Enhancement: Enhanced handling of user restricted fields

Key Benefits: Org chart rendering gracefully handles fields that are restricted by user profile. The org chart will now be displayed with the word "restricted" for all fields not accessible by the user. The user is able to navigate the org chart and understand access limitations.

Enhancement: Closed opportunities will not be loaded into the org chart

Key Benefits: Mindjet Deal Navigator will no longer load closed opportunity data. This update shows the user only relevant data and increases org chart loading performance.

Enhancement: Support for Google Chrome browser

Key Benefits: Mindjet Deal Navigator now provides support for the Google Chrome browser to keep in sync with the list of Salesforce supported browsers.

Enhancement: Allow users to specify a fill color for a contact or account in the org chart

Key Benefits: Users can identify and color code groups of contacts or accounts to highlight them as strategic to the opportunities being viewed.

Enhancement: Allow users to remove a contact from view that was inserted from another company

Key Benefits: Mindjet Deal Navigator provides the ability to bring key contacts in and out of the org chart view as their role in the opportunity changes. This will not affect the contacts status and data stored in Salesforce.

Enhancement: Mindjet Deal Navigator Error Dialogue Box Now Displays More Salesforce Information for Diagnosis

Key Benefits: Your Salesforce Administrator can now more easily diagnose the underlying issue without having to utilize tools like Firebug for diagnosis. For example, if a Mindjet Deal Navigator query error is caused by not having read access to an underlying Salesforce error, this dialogue box will provide guidance on which specific field(s) requires field level accessibility review by the Administrator.

Enhancement: Support for users who have defined territory management restrictions in Salesforce

Key Benefits: Mindjet Deal Navigator now provides an intuitive and accurate visual representation of the generated customer account in Salesforce, allowing the user to see those entities to which he or she has proper Salesforce permissions.

Enhancement: Mindjet Deal Navigator handles account entities that have defined restricted access in Salesforce to their Parent Account, under Territory Management's Account Assignment Rules

Key Benefits: Mindjet Deal Navigator now captures these Account Assignment rules for Territory Management when generating an org chart that has these underlying restrictions. The generated org chart provides intuitive visual indicators on account entities to which this Salesforce user has restricted access.

Recent Resolved Issues for Mindjet Deal Navigator Build 2.4.279

Resolved Issue: Newly inserted contact from another company displays its "report to" contacts after Mindjet Deal Navigator is reloaded for this account.

Key Benefits: Only the contact inserted from another company is displayed.

Resolved Issue: Introductory Tooltips Box on Using Deal Navigator to "Drag and Drop Contacts" and "Tag Relevant" services may appear more than once

Key Benefits: This box no longer appears after its initial closure.

Resolved Issue: The "Restoring Filters' message occasionally displays for a long time during the org chart rendering process.

Key Benefits: Mindjet Deal Navigator generates the visualization of the chart for the designated account in the state that it had for the user the last time he or she performed this operation and does not get stuck in the "Restoring Filters" state.

Resolved Issue: Mindjet Deal Navigator no longer generates a "Parse" error when underlying Salesforce data contains either backslash "\" or double quote """ characters

Key Benefits: The application now intelligently handles Salesforce data that includes these elements, and prevents the generation of these errors.

Known Issues: Mindjet Deal Navigator Build 2.4.279

Issue: “Null” value displayed in the “Report To” field of the Contact Details Page for a Contact that reports to another contact without a “first name” value entry.

Steps to Reproduce:

1. For a specific account in Salesforce, create a contact without a first name value.
2. Generate Mindjet Deal Navigator from the contact details page for this newly created contact.
3. Select another contact within this account and “drag and drop” it to indicate that it reports to contact
4. Observe the display of the Contact Details Panel for this contact.

Actual Results: The “Report To” field for this contact displays its first name as “Null”.

Expected Results: “Null” should not be displayed for the contact’s first name.

Workaround: No workaround exists currently. Mindjet is currently investigating this issue, and anticipates having a fix for it in an upcoming release of Mindjet Deal Navigator.

Issue: Mindjet Deal Navigator does not fit fully on a screen with display resolution of 1024x768, creating both horizontal and vertical browser scrollbars for navigation.

Steps to Reproduce:

1. Launch Mindjet Deal Navigator with the display screen resolution set to 1024x768.

Actual Results: Mindjet Deal Navigator does not fit on the screen fully with this resolution, creating both horizontal and vertical browser scrollbars for cross-window navigation purposes.

Expected Results: Mindjet Deal Navigator should be optimized to fully fit in the window, negating the need for scroll bars.

Workaround: Use of the vertical and horizontal scrollbars allows the user to access any portion of the generated org chart within Mindjet Deal Navigator.

Issue: The Opportunity Role field in the Opportunity Details Panel is not populated with assigned contact opportunity roles.

Steps to Reproduce:

1. In Salesforce, navigate to the opportunity form for a specific opportunity.
2. Generate Mindjet Deal Navigator from this opportunity detail page.
3. Select the opportunity box within the generated view.
4. Review the associated Opportunity Detail Panel for this opportunity on the right side.

Actual Results: The “Roles” field within the Detail Panel has no values.

Expected Results: The Opportunity Details Panel should display the roles that have been assigned to date to specific contacts tied to the opportunity.

Workaround: You can view the specific assigned role(s) to individual contacts within the generated opportunity view.

Issue: Mindjet Deal Navigator does not provide a message upon execution of the “Tag Relevant” command to indicate that no contacts have been tagged.

Steps to Reproduce:

1. Navigate to a specific account within Salesforce for which no contacts have been “tagged”.
2. Generate Mindjet Deal Navigator from this account.
3. Invoke “Filter” and then “Relevant Tag” from Deal Navigator’s upper toolbar.

Actual Results: There is not a message to indicate that no contacts have been tagged as relevant.

Expected Results: A message should be displayed to indicate that no contacts have been tagged as relevant.

Workaround: Begin “tag relevant” actions on the contacts for this account or opportunity, using either the Contact Details Panel’s “Tag/Untag” control or the “Tag” command invoked from Mindjet Deal Navigator’s upper toolbar. Mindjet intends to have a message indicator for this “*No contacts tagged*” result in an upcoming release of Mindjet Deal Navigator.

Issue: Multiple comments added to the same contact may slightly overlap each other on the generated org chart.

Steps to Reproduce:

1. Navigate to a specific account within Salesforce.
2. Generate Mindjet Deal Navigator from the Account Detail page for this account.
3. Select one contact within the account, and add multiple comments to it

Actual Results: Some of the comments slightly overlap each other in areas around the selected contact.

Expected Results: Mindjet Deal Navigator should intelligently position the comments in relation to each other and to the associated contact.

Workaround: No workaround currently available. Mindjet is currently investigating this issue, and anticipates having a fix for it in an upcoming release of Mindjet Deal Navigator.

Issue: “Dragging and dropping” contacts who have defined relationships from one account entity to another will re-position the relationship lines

Steps to Reproduce:

1. Navigate to a specific account that is comprised of multiple account entities (complex account) within Salesforce.
2. Generate Mindjet Deal Navigator from this account page.
3. Select a few contacts, and create relationships between these contacts and other contacts within the account.
4. “Drag and drop” a few of these contacts under another account entity that is part of this complex account.

Actual Results: The positions of the relationship lines has changed.

Expected Results: The position of the defined relationship lines between contacts remains either the same or very close to the original one.

Workaround: The user can select each of these relationship lines, and manually adjust their position in the current view. Mindjet is currently investigating this issue of advanced relationship line position handling for possible future Mindjet Deal Navigator roadmap consideration.

Issue: The Parent Account field is not pre-populated with an account value when the “New Account” command is invoked with the Opportunity Box selected

Steps to Reproduce:

1. Navigate to a specific opportunity within Salesforce.
2. Generate Mindjet Deal Navigator from the opportunity details page.
3. Select the Opportunity box within the generated org chart.
4. Click “New” and then “Account” from the Mindjet Deal Navigator upper toolbar
5. View the Salesforce account form for new account entry.

Actual Results: The Salesforce Account Details page is displayed in “edit mode”, and the Account field is not pre-populated with the name of the Account associated with this opportunity.

Expected Results: The Parent Account field should automatically pre-populate with the name of the account associated with this opportunity.

Workaround: The user can simply update the Account field manually with the appropriate value. Mindjet is currently investigating this pre-populated value issue, and anticipates having a fix for it in an upcoming release of Mindjet Deal Navigator.

Issue: Comments on relationship lines between contacts may separate slightly from the lines when the user filters by opportunity

Steps to Reproduce:

1. Navigate to the Account Details page in Salesforce for a specific account.
2. Generate Mindjet Deal Navigator from this page.
3. Once the account is generated, select a specific contact.
4. From the upper toolbar, select “Insert” and then “Relationship” to select and then define a relationship between this contact (Contact A) and another contact (Contact B) in the chart.
5. With the relationship line still selected, select “Insert” and then “Comment” from the upper toolbar to add a comment to this relationship.
6. From the upper toolbar, select “Opportunity” and then assign a specific opportunity role to Contact A.
7. From the upper toolbar, select “Filter” and then select the opportunity for which you just assigned a role.

Actual Results: The filtered result displayed shows the correct contacts to which roles have been assigned for this opportunity. However, the comment assigned to the relationship of this contact is now displayed slightly disconnected from the relationship line.

Expected Results: Comments attached to relationships for such contacts should remain attached to the relationship line in an opportunity-filtered result view.

Workaround: Mindjet has made improvements to address this issue in the 2.4 release.

Issue: The “Remove Filter” button remains active after filter options have been de-selected in the “Filter” command’s dropdown menu

Steps to Reproduce:

1. Navigate to a specific account detail page within Salesforce.
2. Select a contact, and then select its “Tag Relevant” option in its detail panel to the right.
3. Repeat this exercise for a few contacts.
4. Invoke “Filter” and then “Relevant Tag” as a menu option from the Deal Navigator upper toolbar.
5. After reviewing the “tag relevant” filtered contacts, go back to the Filter command in the upper toolbar and uncheck the “Relevant Tag” to remove this filter.
6. Observe the “Remove Filters” command button the Deal Navigator upper toolbar.

Actual Results: The “Remove Filters” button on the Deal Navigator upper toolbar is enabled.

Expected Results: The “Remove Filters” button should be disabled.

Workaround: Mindjet is currently investigating this issue, and anticipates that we will address it in an upcoming release of Mindjet Deal Navigator.

Issue: Mindjet Deal Navigator users do not currently have the ability to assign a comment to a boundary.

Steps to Reproduce:

1. Navigate to the account detail page for a specific account within Salesforce.
2. Generate Mindjet Deal Navigator from this page.
3. Select a specific contact within the generated org chart, and then navigate to "Insert" and then "Boundary" as a drop down menu option to add a boundary to this contact.
4. With the boundary still selected, go to the Deal Navigator upper toolbar. Select "Insert", and then attempted to select Comment as a drop-down menu option.

Actual Results: The "Comment" command option is grayed out, and the user is not able to add a comment to a boundary.

Workaround: There is no workaround currently. Mindjet plans to address this as an enhancement to Mindjet Deal Navigator in an upcoming release.

Issue: During a Mindjet Deal Navigator user session, the Salesforce.com user menu for *Setup*, *System Log* & *Logout* is not clickable to access these dropdown options

Steps to Reproduce:

1. Navigate to the account detail page for a specific account within Salesforce.
2. Generate Mindjet Deal Navigator from this page.
3. Click on the Salesforce User Menu ("username") dropdown in the upper right hand corner of Salesforce.

Actual Results: The Salesforce user menu dropdown is not activated and shown.

Expected Results: The Saleseforce user menu should be active, and the click selection action should invoke the dropdown menu items for Setup, System Log and Logout.

Workaround: The user can close the Deal Navigator session and select any of the Salesforce upper toolbar or left menu items to return to Salesforce. At this point the Salesforce user menu dropdown capabilities are again active.

Issue: The user is not able to collapse the left vertical sidebar menu while in a Mindjet Deal Navigator session.

Steps to Reproduce:

1. Navigate to a designated account within Salesforce.com
2. Select the Mindjet Deal Navigator button to generate the org chart for this account.
3. After the org chart is generated, select the guiding arrow on the upper right hand side of the left-side vertical menu bar to collapse it.

Actual Results: This sidebar menu arrow is inactive, so collapsing it cannot be completed.

Expected Results: This left side panel menu collapses, enabling the Mindjet Deal Navigator canvas to resize (enlarge) as a natural adjustment to the panel's removal.

Workaround: The user should ensure that he/she has collapsed this left side menu panel prior to invoking Mindjet Deal Navigator. Mindjet is investigating this issue, and hopes to address this issue in an upcoming release of Mindjet Deal Navigator.

Issue: The dialogue box for the command to export the current org chart view as an image should provide slightly different step-by-step guidance points.

Steps to Reproduce:

1. Navigate to the account detail page for a specific account within Salesforce.
2. Generate Mindjet Deal Navigator from this page.
3. Click on "Export" from the Deal Navigator upper toolbar, and then select "Export as Image" as a dropdown option.
4. Review the guidance points within the dialogue box for "Export as Image".

Actual Results: The current dialogue box indicates the following in Points 2 and 3:
Point 2: *Select "Save As" from the file menu in the pop-up window, or*

Expected Results: The dialogue box should provide the following guidance in Points 2 and 3:
Point 2: *Right-click the image in the new window, and then click "Save Image As" or "Save Picture As" (depending on your browser)*
Point 3: *Navigate to the location in which you would like to save the image, enter its name, and then click "Save".*

Workaround: Please use the "Expected Results" steps above to save the exported image of your org chart as you see fit. Mindjet will update this tip guidance dialogue box in an upcoming release of Mindjet Deal Navigator.