

OrgView

Relationship Management

Overview

OrgView for AppExchange enables Salesforce users to rapidly build, view, and drill down on highly graphical organization charts. OrgView is 100% native to the Salesforce platform and is provided free of charge. OrgView Pro includes additional features for more advanced charting needs, including Visio export, chart colorization, user-defined hierarchies, and customizable tool tips.

To build effective relationships, OrgView is a graphical compass to navigate through your account, contact, and user role hierarchies.



Main Features – OrgView

- **Chart Builder:** Build organization charts by connecting accounts, contacts, and user roles via drag and drop.
- **Visual Charts:** Auto-scroll through charts of any size as a graphical tree or outline control. Show relationships between various hierarchies.
- **Pan Zoom Search:** Rapidly navigate by panning, zooming, and searching by name.
- **Dynamic Re-parenting:** Move entire hierarchies with drag and drop. Salesforce data is automatically updated.
- **Partial Information:** View the various pieces of disconnected or incomplete charts as they are assembled.

Main Features – OrgView Pro

OrgView Pro includes the following additional features:

- **Visio Export:** Export OrgView charts in Visio format.
- **Chart Colorization:** Color code Salesforce objects in a chart (e.g., accounts) based on any criteria you define.
- **User-Defined Hierarchies:** Drag and drop nodes (e.g., contacts) to define your own hierarchical relationships.
- **Customizable Tool Tips:** Select which fields to display in chart node tool tips (e.g., account address, phone number, industry, etc.).

Key Benefits

OrgView simplifies complex organizational hierarchies, making key business relationships easy to visualize for the end user. Key benefits include:

- Automatically generate rich organization charts based on your existing account, contact, and user role information.
- Build new charts from scratch with an intuitive drag and drop capability, or modify existing charts as organizations change.
- Rapidly navigate through complex organizational structures with dynamic panning and zooming, graphical searches and drill-down.

Learn More

To learn more about OrgView, visit <http://www.dreamfactory.com/orgview/> or contact DreamFactory at 1-888-399-DREAM (3732) or info@dreamfactory.com. Try OrgView today for Free. Contact sales for OrgView Pro pricing.