Installation Guide

Org Chart by DemandFarm for MS Dynamics CRM

Table of Contents

Introduction

The Org Chart application by DemandFarm offers a single page view of all Contacts within an Account and helps nurture the right relationships with the right people using simple and interactive features.

Org Chart allows users to build a hierarchical chart for their accounts via the easy *drag & drop* feature provided in the Org Chart builder interface. The outcome is a hierarchical structure for an Account that helps to identify Key Contacts, their awareness about products and/or services that you offer - whether they are your *Champions* or *Detractors*.

Org Chart by DemandFarm is a complete native MS Dynamics CRM application – all data generated and updated from this application is stored within your CRM itself and can be governed by your data and security policies as the rest of your CRM.

Installation Process

Org Chart by DemandFarm is listed on the Microsoft AppSource Store. To install this application, you require Global Administrator, System Administrator or System Customizer access.

Please note that Org Chart by DemandFarm **only** works with **MS Dynamics 365 (V9.1) and above**. Older versions of MS Dynamics CRM are not supported.

The process for installation is driven by the permissions available with you –

- For users with Global Administrator access, please proceed to the section Installation for Global Administrators.
- For users with System Administrator or System Customizer access, please proceed to the section Installation for System Administrators.

If you face any issues installing Org Chart by DemandFarm or would like technical assistance, please do not hesitate to reach out to us on email at support@demandfarm.com.

To reach our sales team or for any other assistance, please write to sales@demandfarm.com or call us on +1 (415) 735-3143.

Installation for Global Administrators

If you're a Global Administrator, you can install the application directly from AppSource by following the steps listed below.
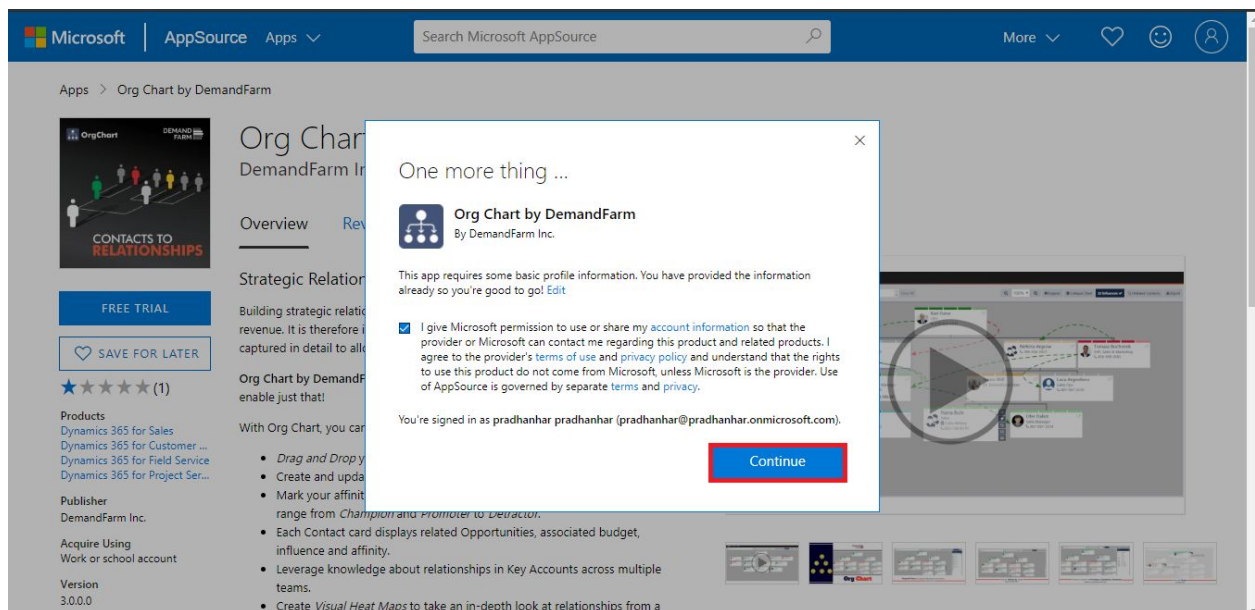
1. Visit the org chart page on Appsource at https://appsource.microsoft.com/en-us/product/dynamics-365/demandfarm.orgchart

2. Click on the Free Trial button on the top-left corner of the page.
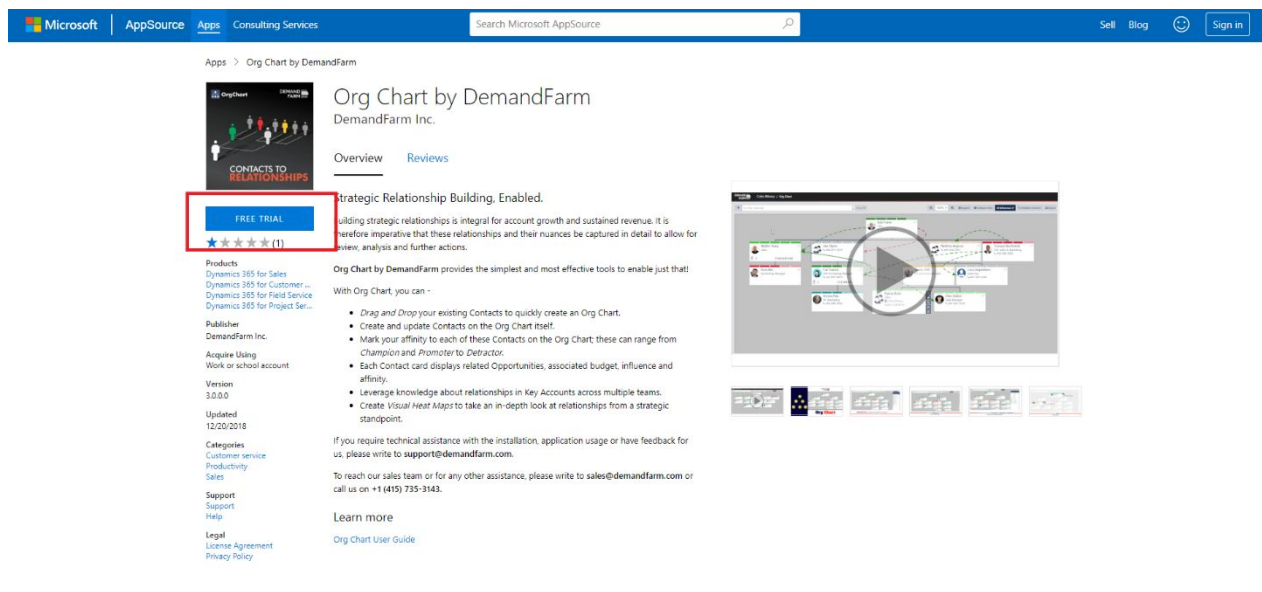
3. If you're not already logged in to Microsoft AppSource, you'll be prompted to login. Please login with your Global Administrator credentials to proceed.

DEMAND FARM
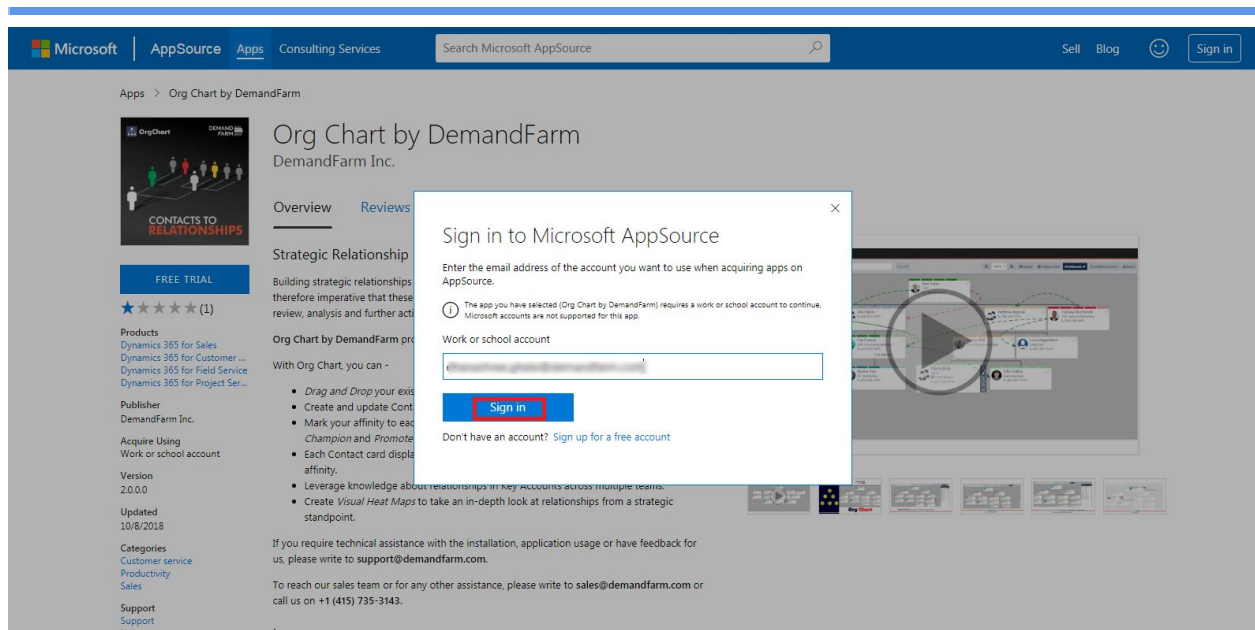
4. Post login confirmation, you will see a modal window prompting to accept terms to begin the installation of Org Chart application. Click Continue.

5. The final confirmation screen lists the Org Chart application details along with some legalese from Microsoft. Select the Organization you wish to install the application on. You will also have to accept both Microsoft Legal Terms and Privacy Statement (checkboxes on the right-hand side) to proceed. Click Agree.

6. The installation process will now commence. You will see the status of the installation in the Administration Center screen. Please wait till the process is completed.


Once the installation is successfully completed, the Org Chart application will appear as Installed in the Administration Center under Manage your solutions.
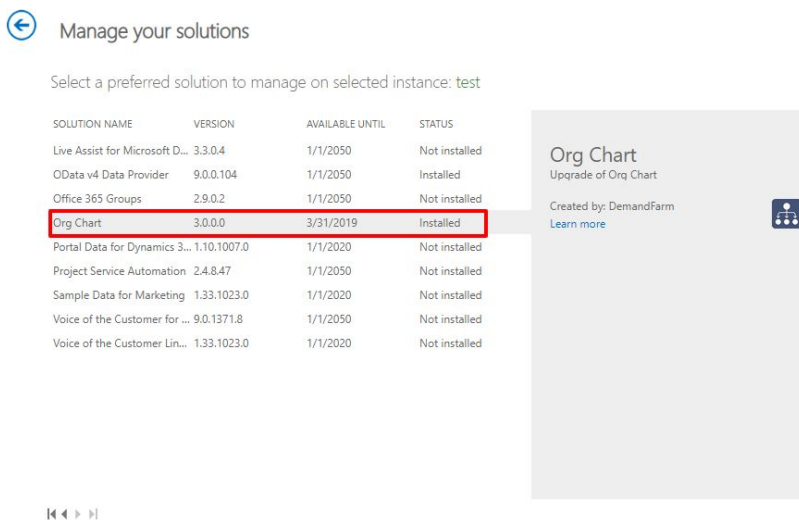
Installation for System Administrators

If you're a System Administrator or System Customizer, you **must** install the application from within MS Dynamics itself. Please note that Installing directly from AppSource may not work for your access level; this is a known issue with Microsoft.

1. Login into MS Dynamics as System Administrator or System Customizer.
2. Navigate to *Settings > Customization*. Click Microsoft AppSource.
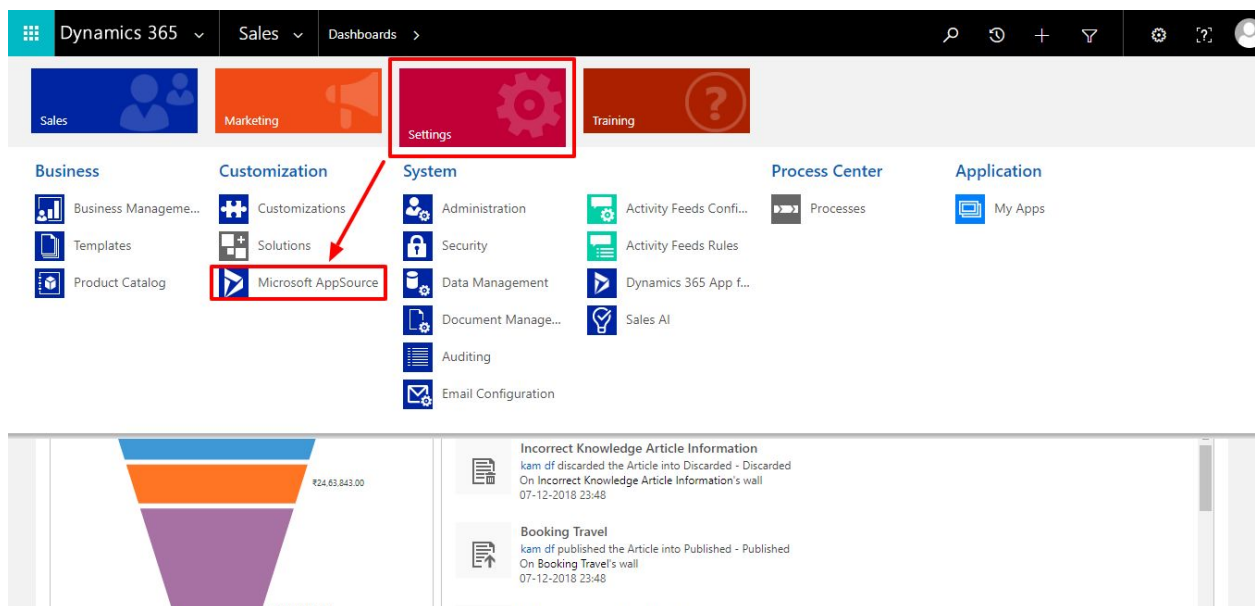
3. An AppSource modal window appears. Search for "Org Chart by DemandFarm". The Org Chart listing will appear as shown below. Click Free Trial to commence installation.

DEMAND FARM
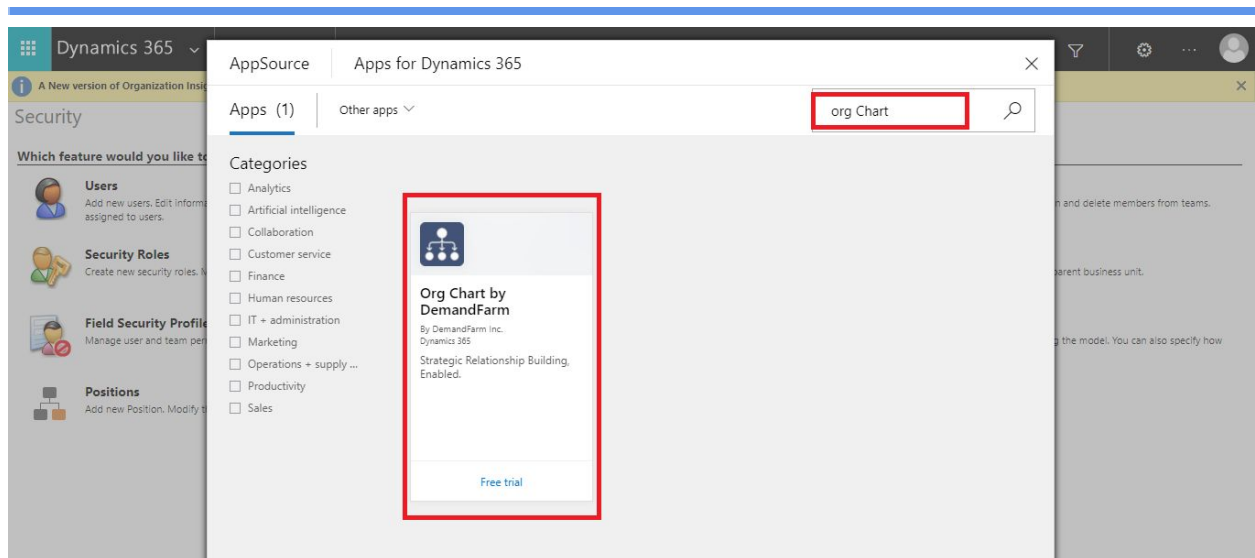
4. The installation process starts. On the modal window, ensure that your basic profile information reflects properly. To check this, click Edit. This will show all your profile details. If you see blanks in all the form fields, stop the installation process and restart from Step 1. This is a known Microsoft issue for which there is no solution yet.
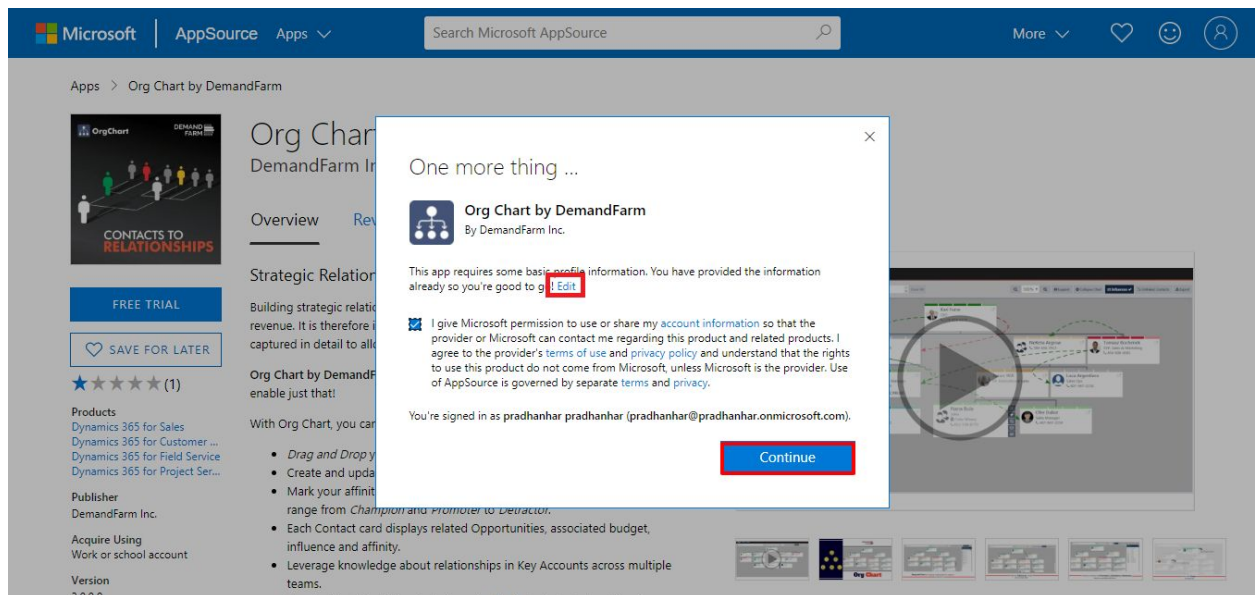

5. If you see your profile information filled in correctly, tick the check box to grant Microsoft access to your account information and to agree to the terms of user and privacy policy for the purpose of this installation. Click Continue.
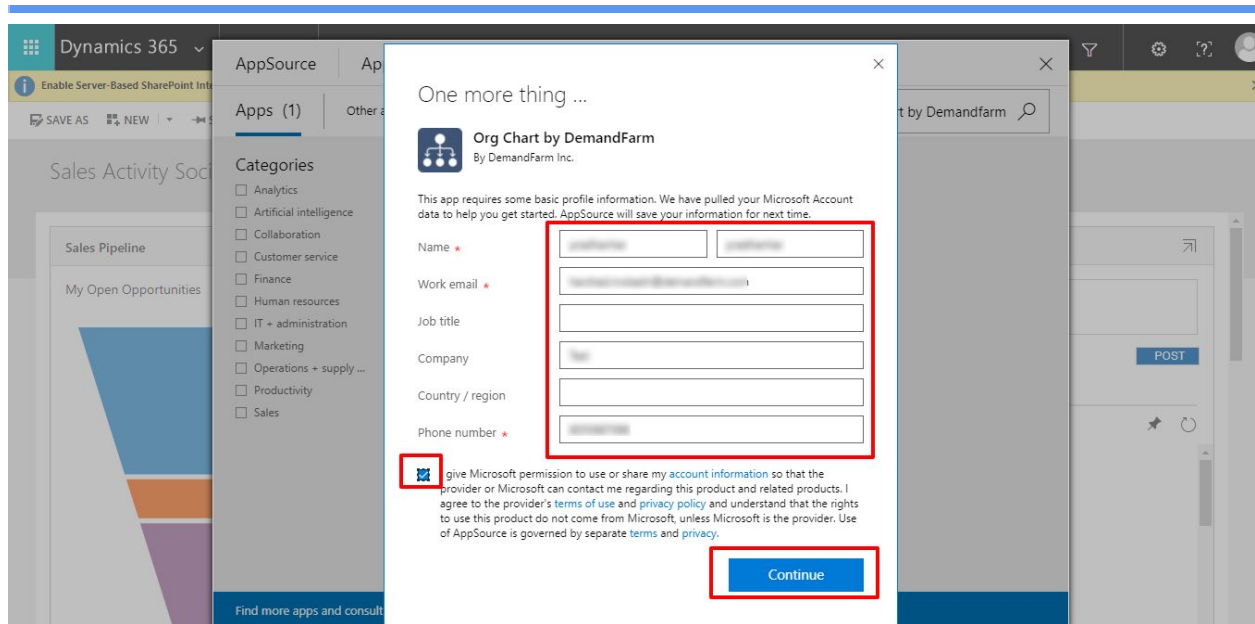
DEMAND FARM

6. The final confirmation screen lists the Org Chart application details along with some legalese from Microsoft. Select the Organization you wish to install the application on. You will also have to accept both Microsoft Legal Terms and Privacy Statement (checkboxes on the right-hand side) to proceed. Click Agree.
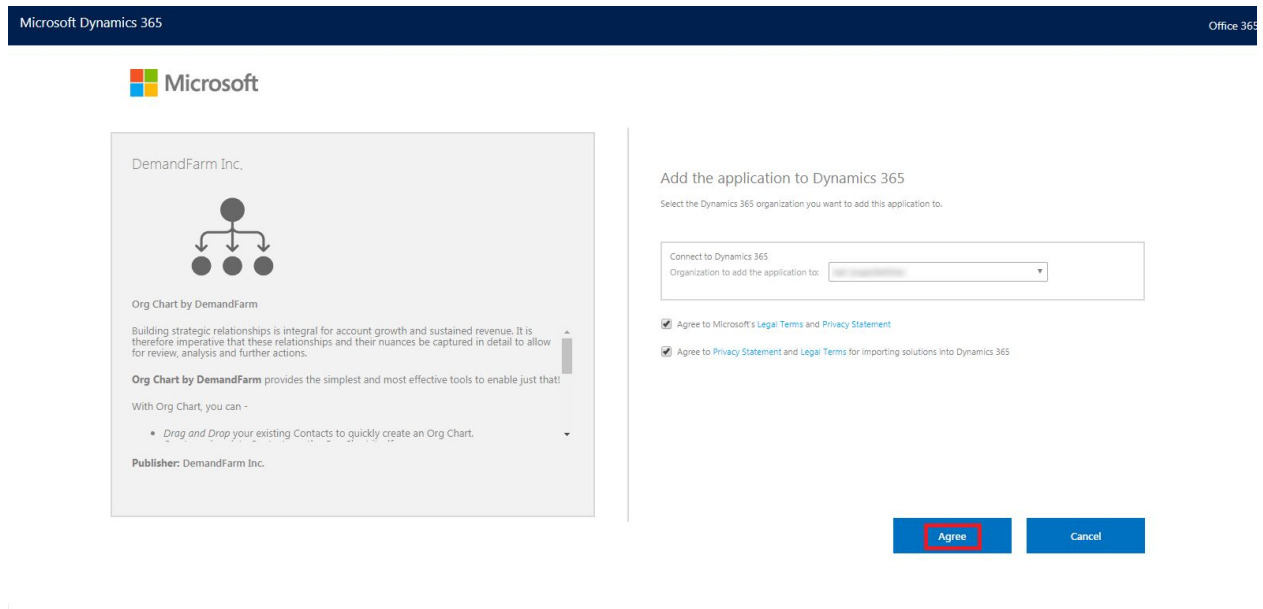
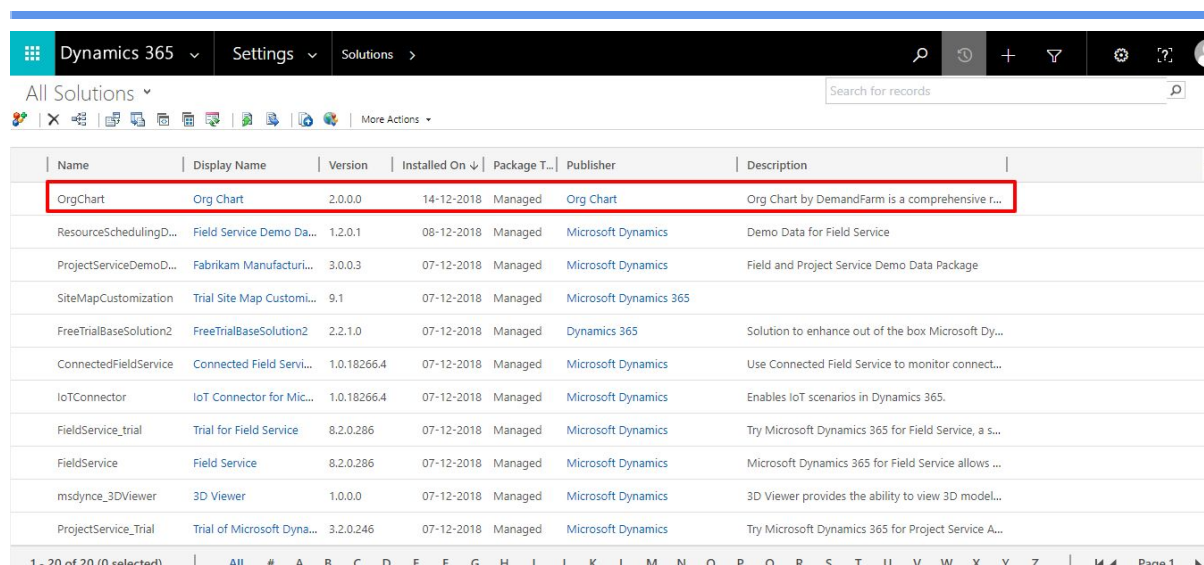7. The installation process will now commence. You will see the status of the installation in the *Manage your solutions* page. Please wait till the process is completed.
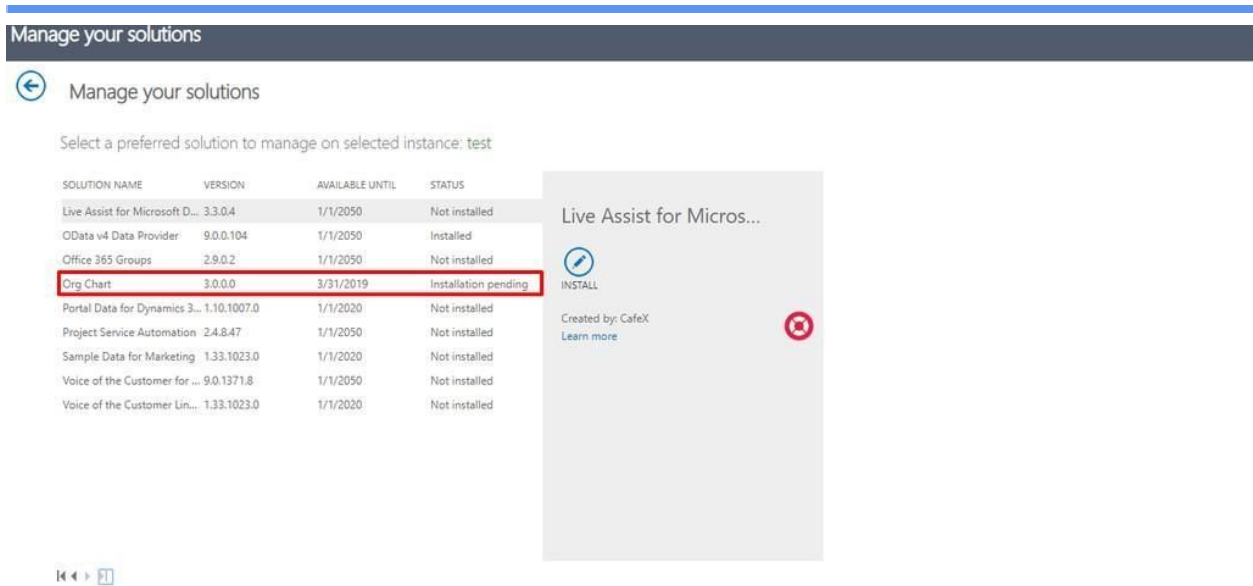
Once the installation is successfully completed, the Org Chart application will appear as
Installed

on the Manage your solutions page.
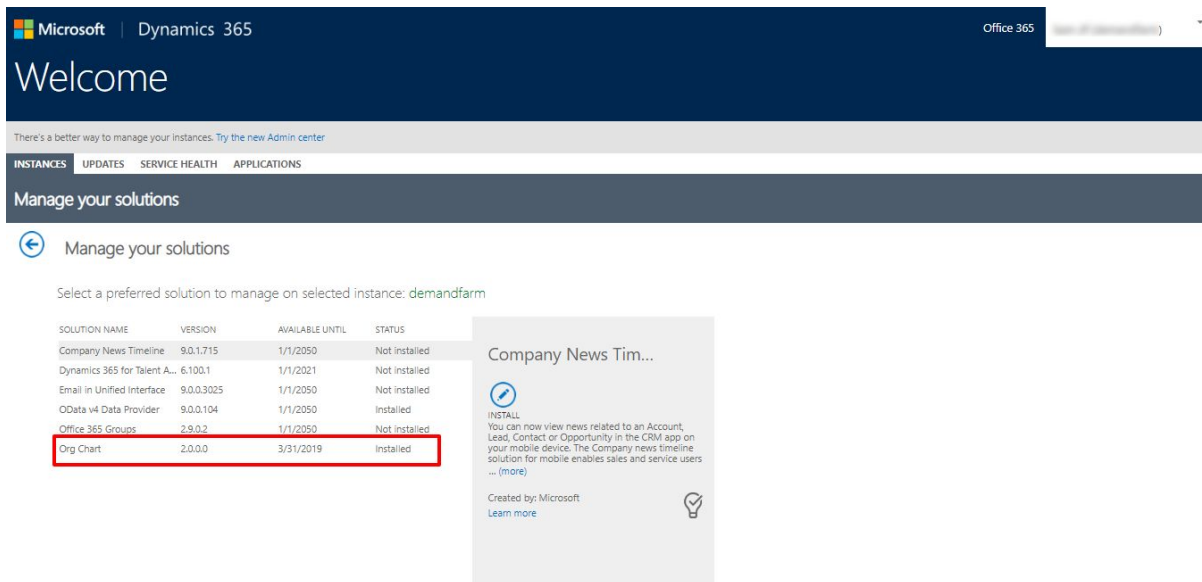
Once successfully installed, the Org Chart application will also appear under *Settings > Solutions
> All Solutions*.

DEMAND FARM

Contact Us

If you face any issues installing Org Chart by DemandFarm or would like technical assistance, please do not hesitate to reach out to us on email at support@demandfarm.com.

To reach our sales team or for any other assistance, please write to sales@demandfarm.com or call us on +1 (415) 735-3143.