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# Post Installation Guide

Org Chart by DemandFarm for MS Dynamics CRM

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## Introduction

Congratulations on installing the Org Chart by DemandFarm application! You're now just a few steps away from being able to use the application and build awesome Org Charts for your strategic Accounts.

Should you face any issues or require any further assistance, please do not hesitate to contact us at [support@demandfarm.freshdesk.com](mailto:support@demandfarm.freshdesk.com).

### Step 1: Add Custom Fields to Contact Form

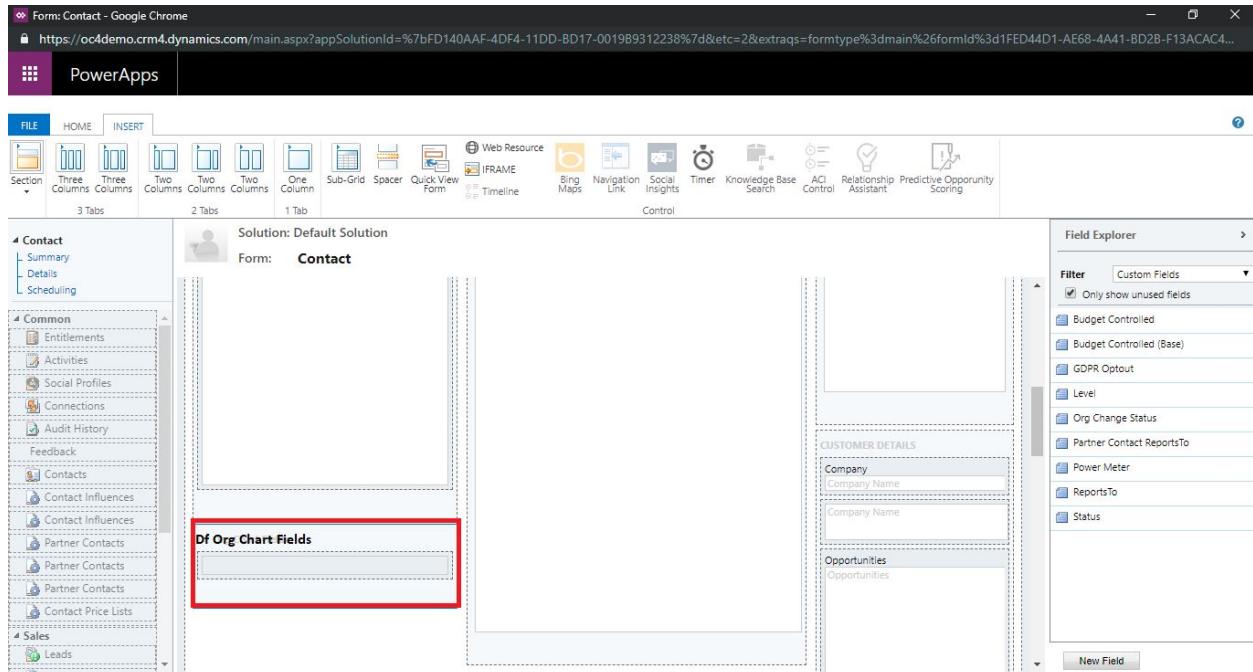
Org Chart is powered by five custom fields that need to be populated by users as they create/update contacts. The System Administrator must add these custom fields on the default and other Contact forms so that the user so that user can add/modify the values.

The fields include -

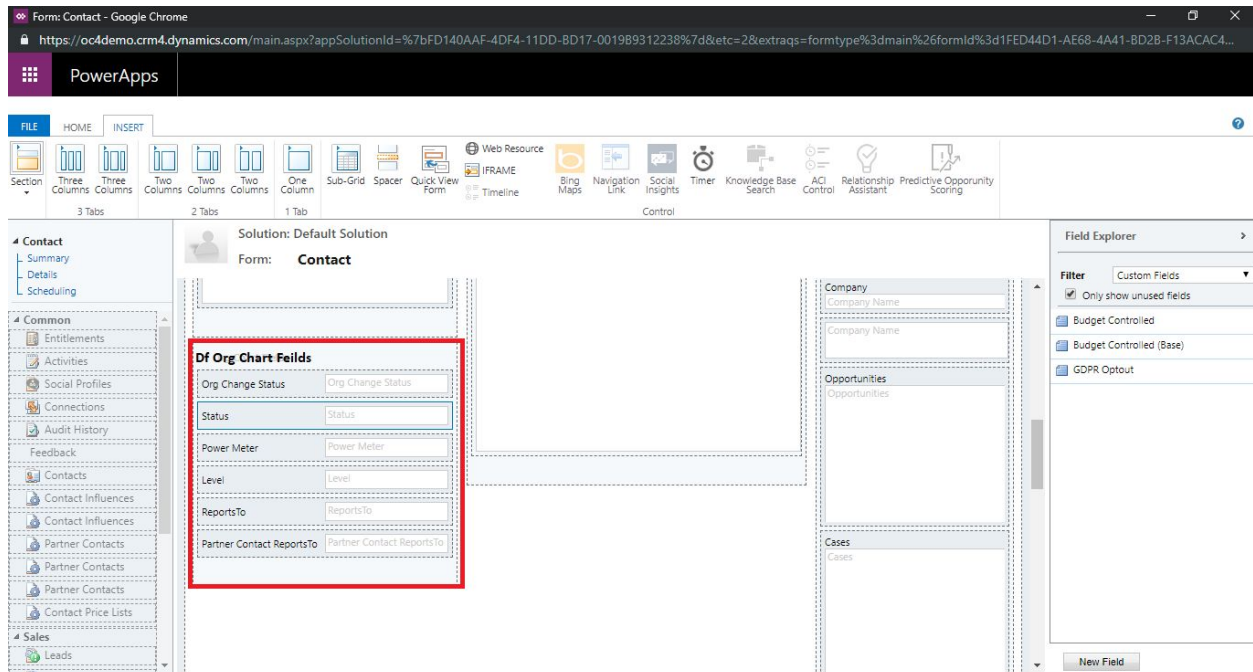
- Status: A measure of the Contact's affinity to your organization. Can be setup with custom list of values to represent different affinity levels identified by your organization
- Power Meter: A measure of the power wielded by the Contact within the Account. for example, Very Low, Low, Moderate, High, Very High
- Level: A measure of the Contact's seniority level within the Account. This is typically setup with hierarchy identified by your organization, for example CXO, VP, Director, Manager, Staff, Other.
- Reports To: An optional link to another Contact, to whom the said Contact reports to in the Account.
- Budget Controlled: A numerical field that captures the monetary budget controlled by the Contact.
- Partner contacts Reports To: An optional link to another Contact, to whom the said Partner Contact reports to in the Account.

## Process

1. Create a new section in Contact Form as shown in below screenshot. You may call it **DF Org Chart Fields** for example.



2. Drag and drop the Org Chart fields from Field Explorer into the newly created section. Arrange the fields as you like. Finally, publish the changes. The new section may look like the screenshot below.



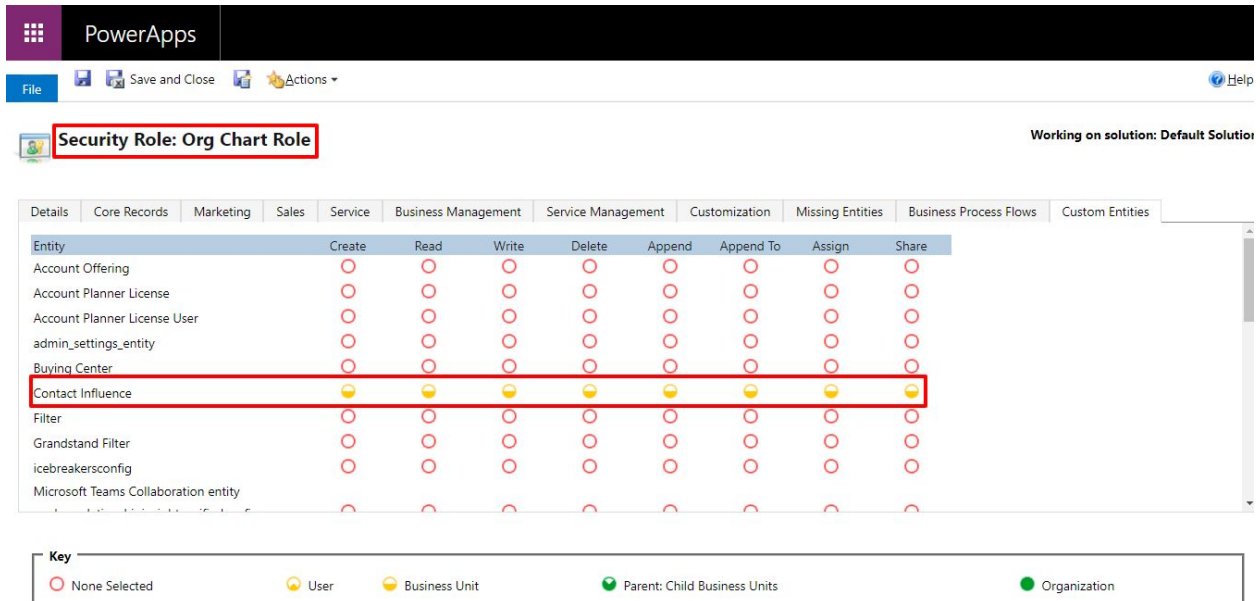
## Step 2: Assign Security Roles to Org Chart Users

For a user to be able to use all functionalities of Org Chart, including updating Contact Influence they require the following permissions -

1. **Read/Write** permission on Contact standard entity.
2. **Read/Write** permission on Contact Influence custom entity.
3. **Read** permission on Org Chart License custom entity.
4. **Read** permission on Org Chart License User custom entity.
5. **Read** permission on Solution standard entity.
6. **Read/write** permission on Partner Contact custom entity.

To be able to only view the Org Chart in read-only state, the user requires Read permissions on Contact and Contact Influence entities. Further combinations can be built as needed. The System Administrator must set up new Security Roles or update existing ones with permissions stated above to allow Users to access and use the Org Chart application.

By default, the Org Chart application is packaged with a Security Role named **Org Chart Role** that grants users full access to Org Chart functionality. This can be used for quick setup of Org Chart user permissions.



The screenshot shows the PowerApps interface for configuring a security role named "Security Role: Org Chart Role". The role is currently set to "Working on solution: Default Solution". The permissions table below lists various entities and the permissions granted to the role.

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Account Offering								
Account Planner License								
Account Planner License User								
admin_settings_entity								
Buying Center								
Contact Influence								
Filter								
Grandstand Filter								
icebreakersconfig								
Microsoft Teams Collaboration entity								

**Key:**

- None Selected
- User
- Business Unit
- Parent: Child Business Units
- Organization

Security Role: Org Chart Role - Microsoft Dynamics 365 - Google Chrome  
<https://o4demo.crm4.dynamics.com/biz/roles/edit.aspx?id=%7b7AAD2B2B-493D-E811-A958-000D3AF28587%7d>

PowerApps

File Save and Close Actions Help

Security Role: Org Chart Role Working on solution: Default Solution

Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Business Process Flows	Custom Entities
Order Invoicing Date										
Order Invoicing Product										
Order Invoicing Setup										
Order Invoicing Setup Date										
Organizational Unit										
OrgChart License User										
OrgChartLicense										
Partner Contact										
Payment										
Payment Detail										
Payment Method										
Payment Term										
Playbook										
Playbook activity										
Playbook activity attribute										
Playbook Callable Context										
Playbook category										
Playbook template										

Key

- None Selected
- User
- Business Unit
- Parent: Child Business Units
- Organization

PowerApps

File Save and Close Actions Help

Security Role: Org Chart Role Working on solution: Default Solution

Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Business Process Flows	Custom Entities
Configuration										
Service Endpoint										
Solution										
System Application Metadata										
System Chart										
System Form										
System Job										
Theme										
User Application Metadata										
View										
Virtual Entity Data Source										

Key

- None Selected
- User
- Business Unit
- Parent: Child Business Units
- Organization



### Step 3: Assign Field Security Profiles to Org Chart Users

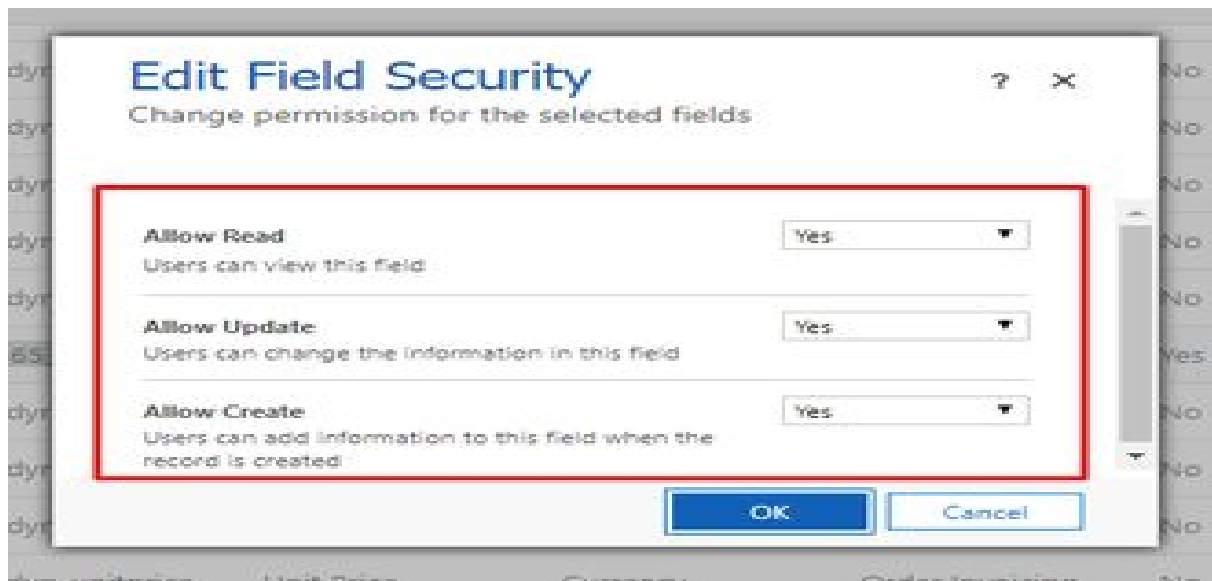
Out of the five custom fields on the Contact standard entity included in the Org Chart application, the Budget Controlled field specifically has been secured. Access to this field, in Org Chart application and otherwise, must be granted to Users through the user of Field Security Profiles. Based on requirement, the System Administrator may create one or more Field Security Profiles and grant Read/Create/Update permissions to the Budget Controlled field. Once an appropriate Field Security Profile is assigned to a User, they will be able to access the Budget Controlled field in Org Chart and throughout MS Dynamics as well.

By default, the Org Chart application is packaged with a Field Security Profile named **Org Chart Profile** that grants users full access (Read/Create/Update) to the Budget Controlled. This can be used for quick setup of Org Chart user permissions.

Field Security Profiles

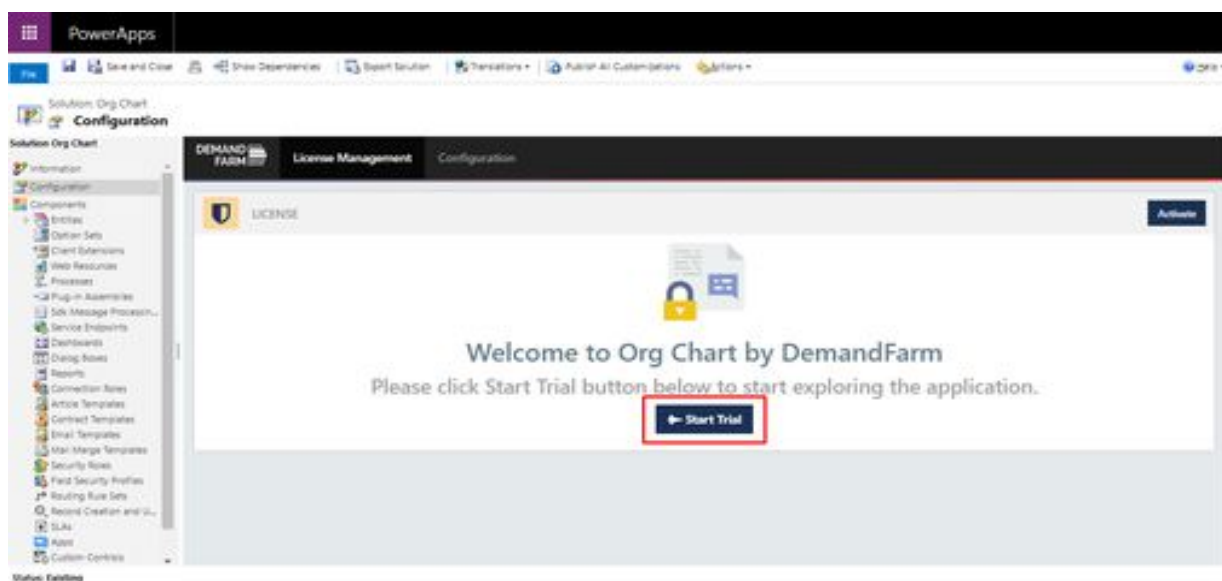
New | [Icons] | More Actions ▾

<input type="checkbox"/>	Name ↑	Modified On	Description
	Field Service - Administrator	08-04-2018 03:36	
	Field Service - Dispatcher	08-04-2018 03:36	
	Field Service - Inventory Purch...	08-04-2018 03:36	
	Field Service - Resource	08-04-2018 03:36	
	Org Chart Profile	11-04-2018 13:50	Org Chart Profile to manage FLS of custom Fields.
	System Administrator	08-04-2018 02:08	System Administrator



#### Step 4: Activate Trial License

To start using DemandFarm, you need to setup your license key. DemandFarm offers a free fully-functional, unlimited-user, limited duration trial license for the first Org Chart installation in your instance. You can activate this trial license through the Solution Configuration page at **Settings** → **Solutions** → **Org Chart**. See screenshot below.



Click on the Start Trial button to activate your trial. The Org Chart application is now ready for use. If you face any issues during installation or require technical help, please write to us at [support@demandfarm.freshdesk.com](mailto:support@demandfarm.freshdesk.com).

The screenshot shows the PowerApps interface for the 'Solution: Org Chart'. The top bar includes 'File', 'Close', 'Show Dependencies', and 'Actions'. A message states: 'You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.'

The left-hand navigation pane lists the following components:

- Information
- Configuration
- Components
  - Entities
  - Option Sets
  - Client Extensions
  - Web Resources
  - Processes
  - Plug-in Assemblies
  - Sdk Message Processin...
  - Service Endpoints
  - Dashboards
  - Dialog Boxes
  - Reports
  - Connection Roles

The main content area is titled 'Solution Org Chart' and features a 'License Management' tab. The license details are as follows:

License Type	Trial Days
TRIAL	30

Additional details include:

- License Expired on: Jan 17, 2019
- Issuer: DemandFarm Inc.
- Current trial license is valid until Jan 17, 2019.
- Expiring in: 30 days

Buttons for 'Request License' and 'Renew' are located in the top right corner of the license management section.



## Step 5: Activate Full License & User Management

Post completion of the trial, access to Org Chart will be restricted until a Full License key is setup on your instance. To procure a Full License key, please send **License Request Email** to DemandFarm Sales at [sales@demandfarm.com](mailto:sales@demandfarm.com) or +1 (415) 735-3143.

Please note that Org Chart works on a per-user license model. You will be assigned a License Key that grants access to a fixed set of users for a fixed duration of time. You may add, revoke or replace individual user licenses as per your requirement and convenience.

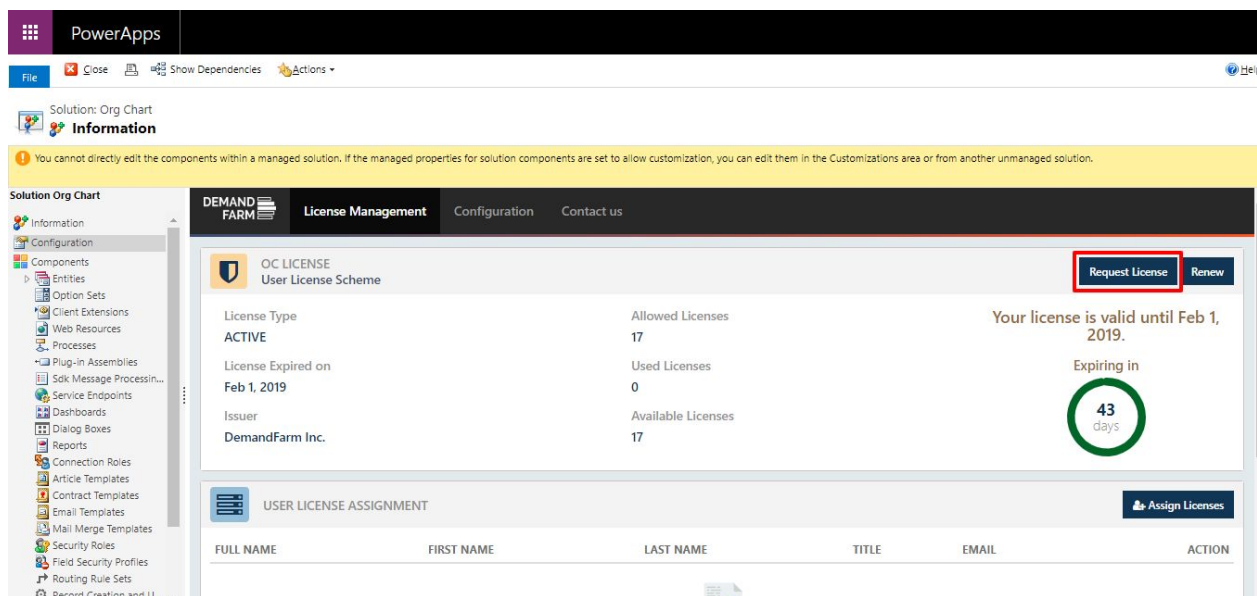
## Setting up Full License on Org Chart

This process must be completed by the MS Dynamics Administrator.

Once the Full License key has been procured, please save it a known location and follow the process listed below.

### Process

- Go to the Org Chart configuration page through **Settings → Solutions → Org Chart → Configuration**.
- Click the **Request License** button. This will open Request License modal window.



The screenshot shows the PowerApps interface for the 'Solution: Org Chart'. The left sidebar contains a navigation menu with options like Information, Configuration, Components, Entities, Option Sets, Client Extensions, Web Resources, Processes, Plug-in Assemblies, Sdk Message Processin..., Service Endpoints, Dashboards, Dialog Boxes, Reports, Connection Roles, Article Templates, Contract Templates, Email Templates, Mail Merge Templates, Security Roles, Field Security Profiles, Routing Rule Sets, and Record Creation and U... The main content area is titled 'OC LICENSE User License Scheme' and includes a 'Request License' button (highlighted with a red box) and a 'Renew' button. Below this, a table displays license details: License Type (ACTIVE), Allowed Licenses (17), License Expired on (Feb 1, 2019), Issuer (DemandFarm Inc.), Used Licenses (0), and Available Licenses (17). A circular progress indicator shows 'Expiring in 43 days'. At the bottom, there is a 'USER LICENSE ASSIGNMENT' table with columns: FULL NAME, FIRST NAME, LAST NAME, TITLE, EMAIL, and ACTION, and an 'Assign Licenses' button.

- Request License modal window contains information related to Organization such as id, name. Fill Number of Licenses field and Number of Months field and click on **Send License Request Button**.



- In case your email client is not configured, you can copy all contents on Request license modal window by clicking on **Copy Email Contents** and compose your email and send to DemandFarm Sales at [sales@demandfarm.com](mailto:sales@demandfarm.com).

A screenshot of the "Request License" modal window. It has a dark blue header with the title "Request License" and a close button. Below the header is an orange informational box with text about copying email contents. The form contains two columns of fields: Organization Id, Organization Unique Name, Solution Name, and Number Of Licenses\* on the left; and Organization Name, Requester Name, Solution Installed On, and Number Of Months\* on the right. At the bottom are three buttons: "Cancel", "Copy Email Contents" (highlighted with a red box), and "Send License Request" (highlighted with a red box).

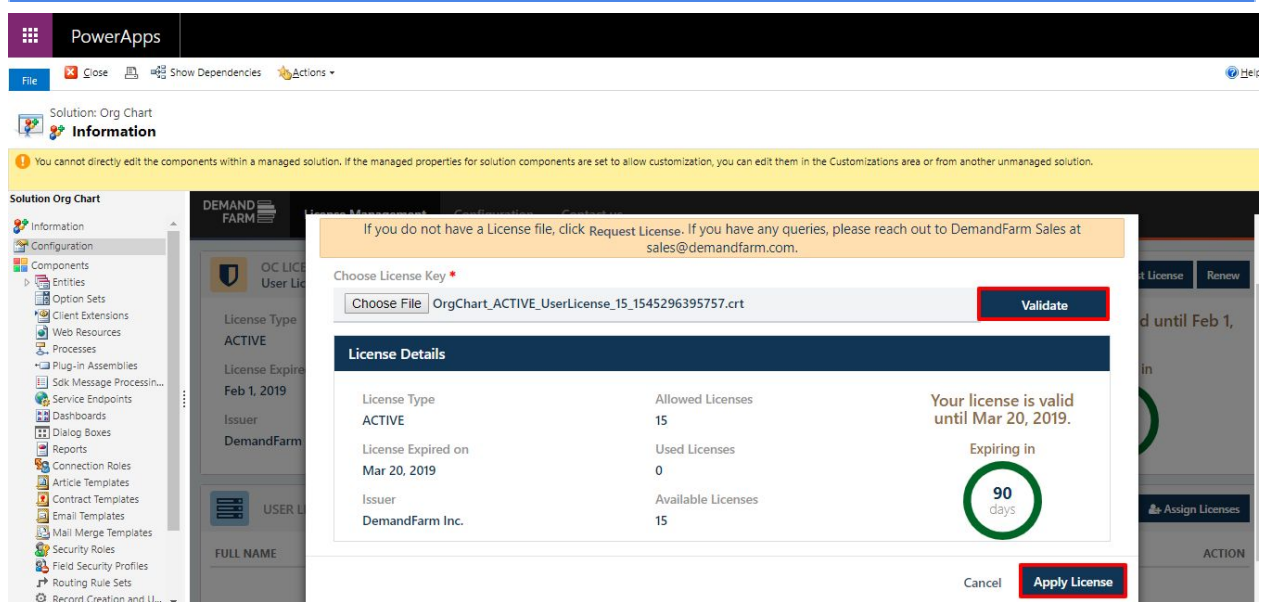
**Request License** ✕

In case your email client is not configured, use **Copy Email Contents** to copy email text and send to DemandFarm Sales at [sales@demandfarm.com](mailto:sales@demandfarm.com).

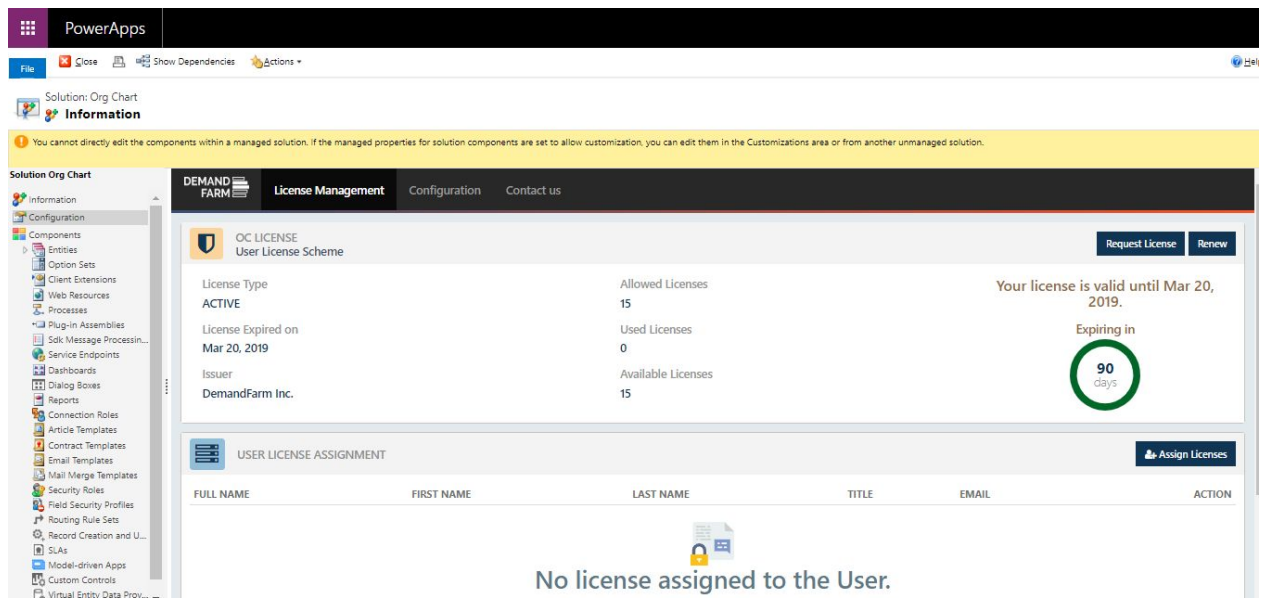
Organization Id	Organization Name
Organization Unique Name	Requester Name
Solution Name	Solution Installed On
OrgChart	
Number Of Licenses*	Number Of Months*
15	3

Cancel **Copy Email Contents** **Send License Request**

- Save **Org Chart Active User License Key** file which has been sent by DemandFarm team and save file to your location.
- Click **Choose File**. Select the **Org Chart Active User License Key** file from the location where it was saved. Click **Validate**. The license details will be shown as below screenshot.



- Confirm the license details by clicking **Apply License**. The Full License key is now setup.



## Assigning Licenses to Users

This process must be completed by the MS Dynamics Administrator.

Go to the Org Chart configuration page through **Settings → Solutions → Org Chart → Configuration**. Click **Assign Licenses**. This will open a new modal window where users can be

searched by First Name, Last Name or Primary Email. Once the user(s) have been located, click Add to assign license to them.

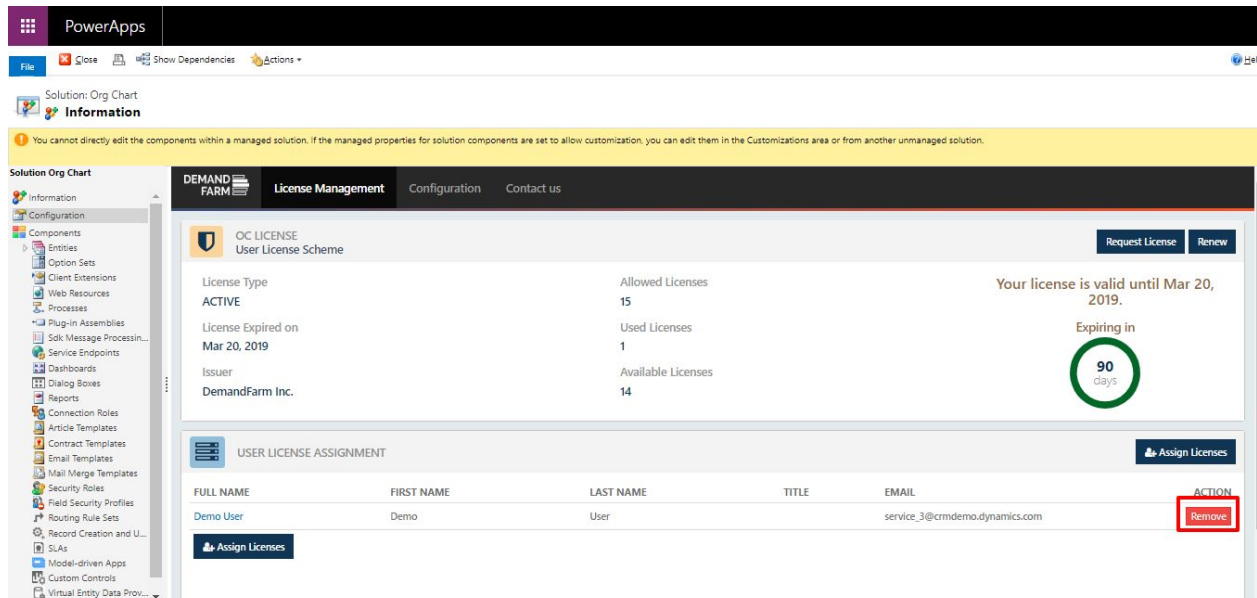
The screenshot displays the DemandFarm Org Chart application. A 'Solution Org Chart' window is open, showing a list of users. A modal dialog titled 'Add User' is overlaid on the screen. The dialog has a search bar for 'First Name' and a table of users. The table has columns for 'FULL NAME', 'FIRST NAME', 'LAST NAME', 'TITLE', 'EMAIL', and 'ACTION'. The first user listed is 'Demo User' with first name 'Demo' and last name 'User'. The email is 'service\_3@cmdemo.dynam...'. The 'ACTION' column has a green 'Add' button. To the right of the table, it says 'Available License : 15'. Below the table is a 'Close' button. In the background, the main interface shows 'OC LICENSE User License Scheme' with details like 'License Type: ACTIVE', 'License Expired on: Mar 20, 2019', and 'Issuer: DemandFarm Inc.'. There is also a 'Request License' button and a 'Renew' button. A circular progress indicator shows '90 days' remaining. An 'Assign Licenses' button is also visible.

FULL NAME	FIRST NAME	LAST NAME	TITLE	EMAIL	ACTION
Demo User	Demo	User		service_3@cmdemo.dynam...	Add

## Revoking Licenses

This process must be completed by the MS Dynamics Administrator.

Go to the Org Chart configuration page through **Settings → Solutions → Org Chart → Configuration**. In the User License Assignment section, locate the user whose license is to be revoked. Click **Remove** to revoke the license for the said user.



**PowerApps**

File Close Show Dependencies Actions

Solution: Org Chart  
Information

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.

**Solution Org Chart**

DEMAND FARM License Management Configuration Contact us

**OC LICENSE User License Scheme** Request License Renew

License Type	ACTIVE	Allowed Licenses	15	Your license is valid until Mar 20, 2019. Expiring in <b>90</b> days
License Expired on	Mar 20, 2019	Used Licenses	1	
Issuer	DemandFarm Inc.	Available Licenses	14	

**USER LICENSE ASSIGNMENT** Assign Licenses

FULL NAME	FIRST NAME	LAST NAME	TITLE	EMAIL	ACTION
Demo User	Demo	User		service_3@crmdemo.dynamics.com	Remove

Assign Licenses