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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

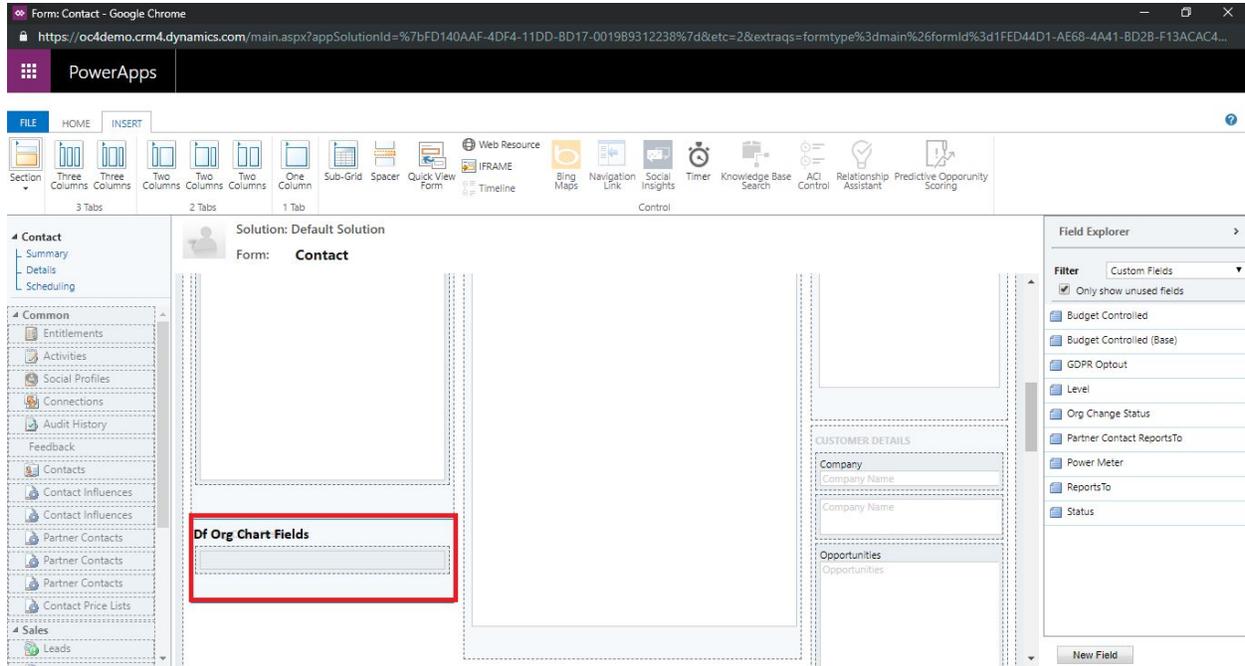
Org Chart is powered by five custom fields that need to be populated by users as they create/update contacts. The System Administrator must add these custom fields on the default and other Contact forms so that the user so that user can add/modify the values.

The fields include -

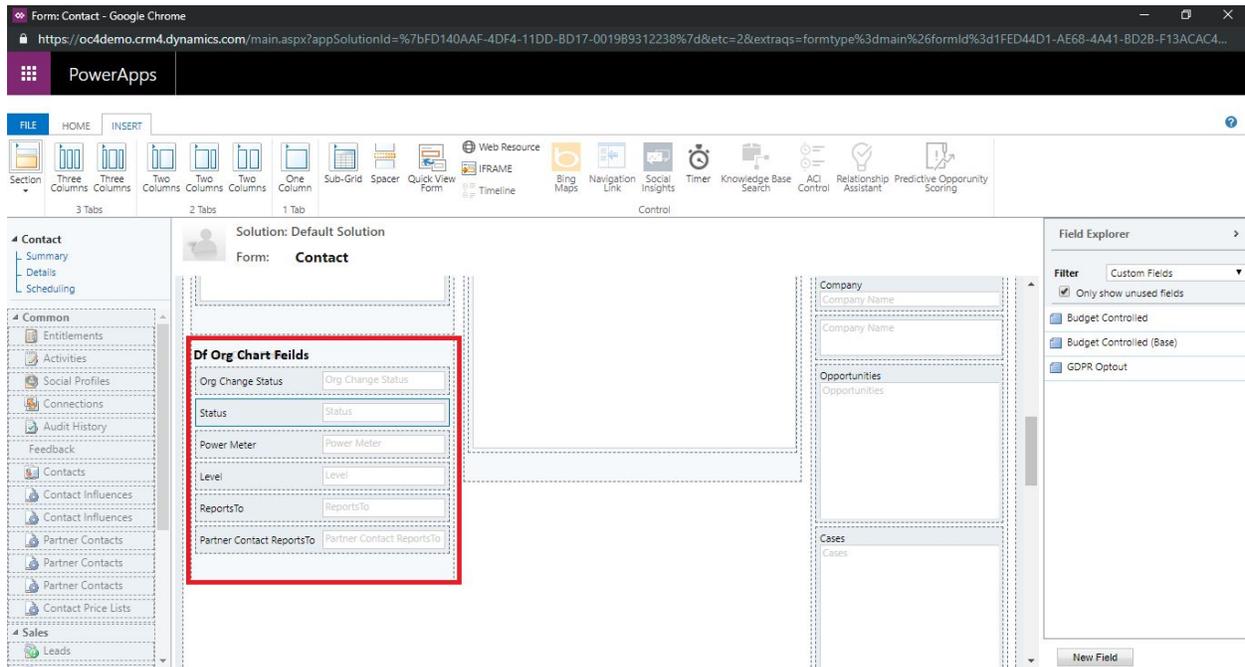
- **Status:** A measure of the Contact's affinity to your organization. Can be setup with custom list of values to represent different affinity levels identified by your organization
- **Power Meter:** A measure of the power wielded by the Contact within the Account. for example, Very Low, Low, Moderate, 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 "User". A table lists various entities with their permissions. The "Contact Influence" row is highlighted with a red box, showing "User" permissions for Create, Read, Write, Delete, Append, Append To, Assign, and Share.

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Account Offering	None Selected							
Account Planner License	None Selected							
Account Planner License User	None Selected							
admin_settings_entity	None Selected							
Buying Center	None Selected							
Contact Influence	User							
Filter	None Selected							
Grandstand Filter	None Selected							
icebreakersconfig	None Selected							
Microsoft Teams Collaboration entity	None Selected							

**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					<input type="radio"/>					
Order Invoicing Product					<input type="radio"/>					
Order Invoicing Setup					<input type="radio"/>					
Order Invoicing Setup Date					<input type="radio"/>					
Organizational Unit					<input type="radio"/>					
OrgChart License User					<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
OrgChartLicense					<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Partner Contact					<input checked="" type="radio"/>					
Payment					<input type="radio"/>					
Payment Detail					<input type="radio"/>					
Payment Method					<input type="radio"/>					
Payment Term					<input type="radio"/>					
Playbook					<input type="radio"/>					
Playbook activity					<input type="radio"/>					
Playbook activity attribute					<input type="radio"/>					
Playbook Callable Context					<input type="radio"/>					
Playbook category					<input type="radio"/>					
Playbook template					<input type="radio"/>					

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
sdk Message Processing step Secure Configuration					<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Service Endpoint					<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Solution					<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		
System Application Metadata					<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
System Chart					<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
System Form					<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
System Job					<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Theme					<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
User Application Metadata					<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
View					<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Virtual Entity Data Source					<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		

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

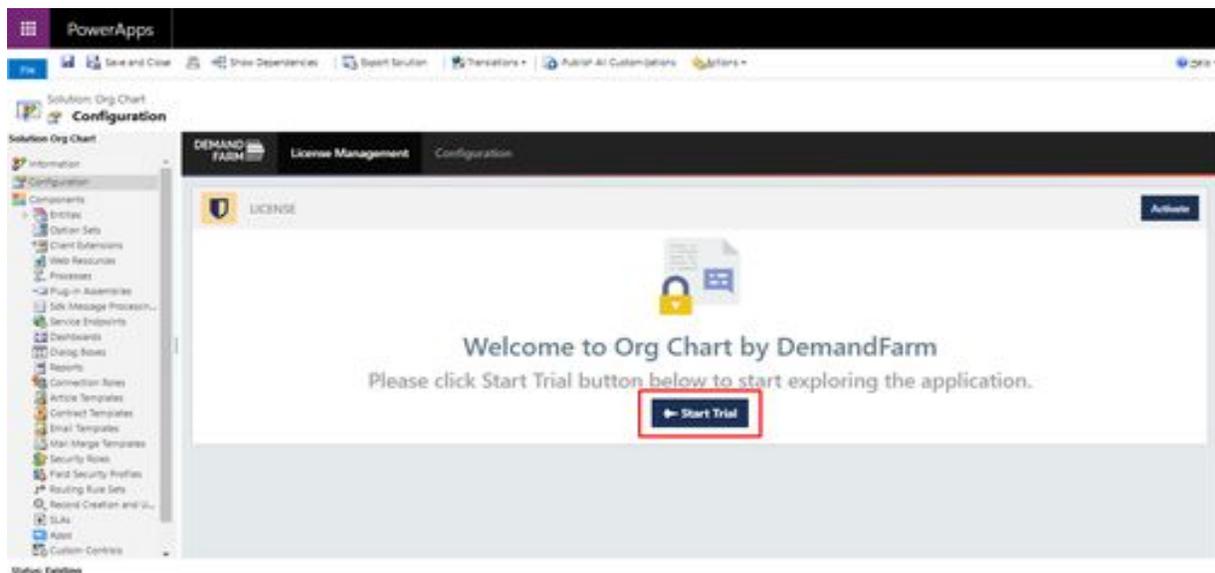
New | [Icons] | More Actions ▾

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



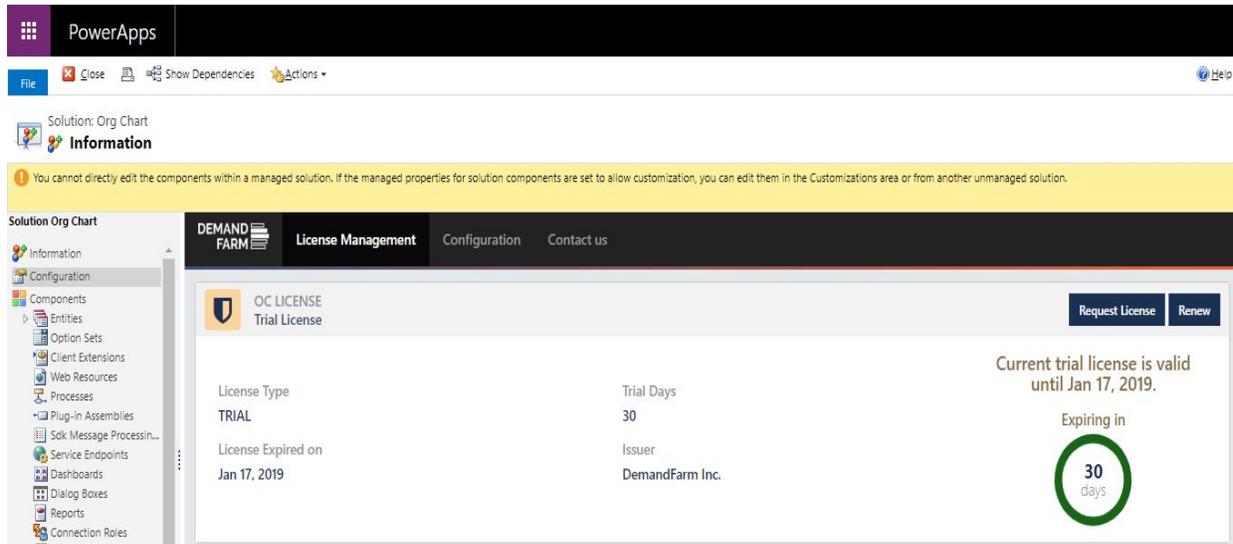
#### Step 4: Activate Trial License

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).



## 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.

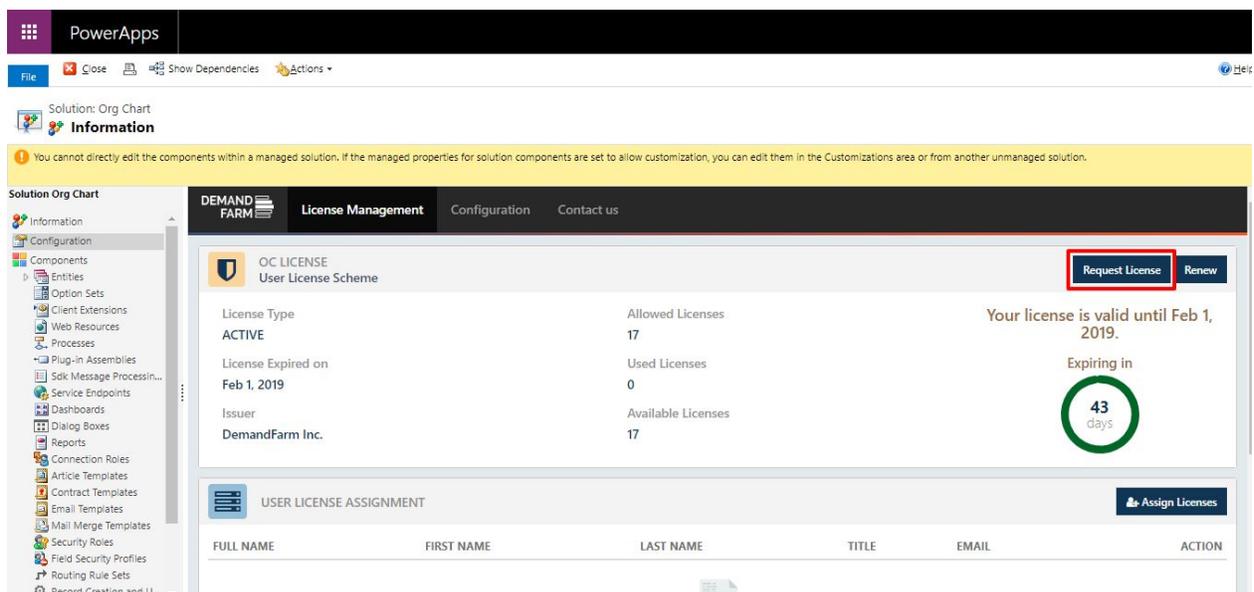
## Setting up Full License on Org Chart

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' configuration page. The 'License Management' tab is active, displaying the 'OC LICENSE User License Scheme' details. The 'Request License' button is highlighted with a red box. The license information includes:

Field	Value
License Type	ACTIVE
License Expired on	Feb 1, 2019
Issuer	DemandFarm Inc.
Allowed Licenses	17
Used Licenses	0
Available Licenses	17

The license is valid until Feb 1, 2019, and is expiring in 43 days. The 'Request License' button is highlighted with a red box, and the 'Assign Licenses' button is also visible.

- 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).

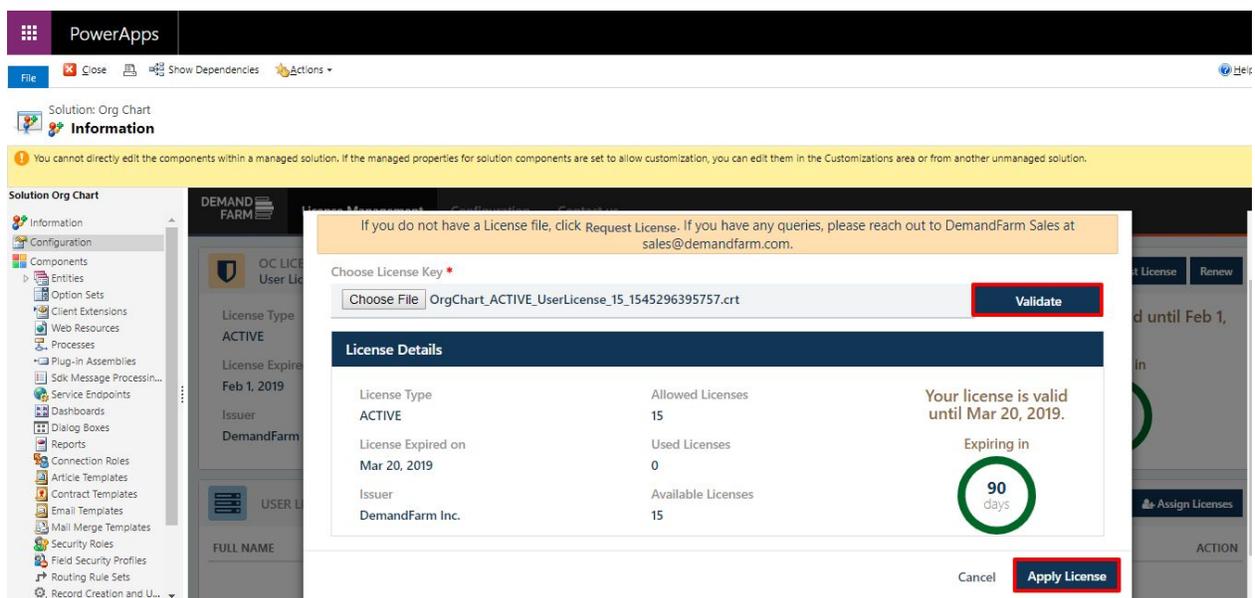
Request License
✕

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.

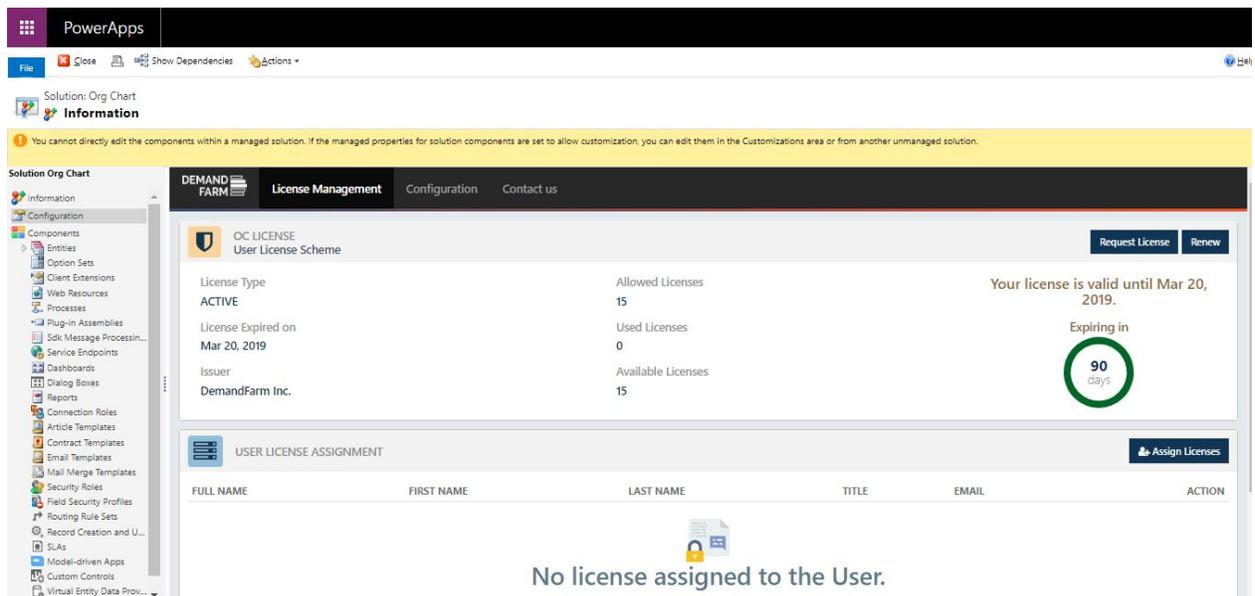
Organization Id <input type="text" value="XXXXXXXXXXXXXXXXXXXX"/>	Organization Name <input type="text" value="DemandFarm"/>
Organization Unique Name <input type="text" value="XXXXXXXXXX"/>	Requester Name <input type="text" value="XXXXXXXXXXXXXXXXXXXX"/>
Solution Name OrgChart	Solution Installed On 10-10-2018
Number Of Licenses* <input type="text" value="15"/>	Number Of Months* <input type="text" value="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.

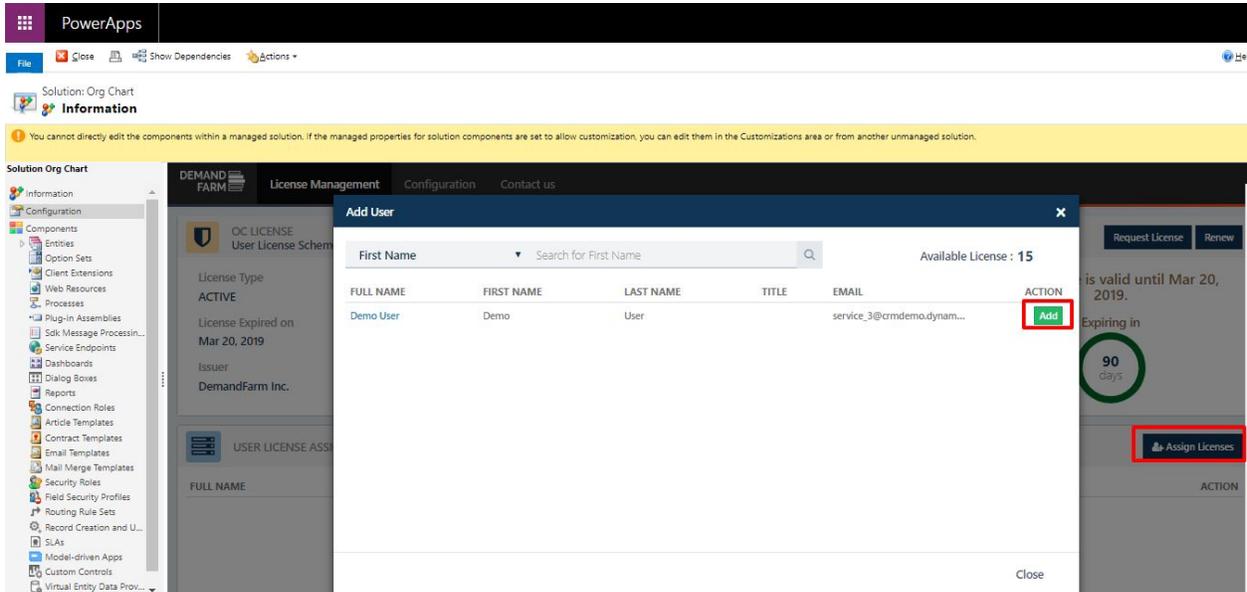


## Assigning Licenses to Users

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.





## 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.

The screenshot shows the PowerApps interface for the 'Solution: Org Chart'. The main content area is divided into two sections:

- OC LICENSE User License Scheme:** This section displays license details:
  - License Type: ACTIVE
  - License Expired on: Mar 20, 2019
  - Issuer: DemandFarm Inc.
  - Allowed Licenses: 15
  - Used Licenses: 1
  - Available Licenses: 14
  - Expiration: Your license is valid until Mar 20, 2019. Expiring in 90 days.
- USER LICENSE ASSIGNMENT:** This section contains a table with the following data:
 

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