

User Guide

Org Chart by DemandFarm for MS Dynamics CRM

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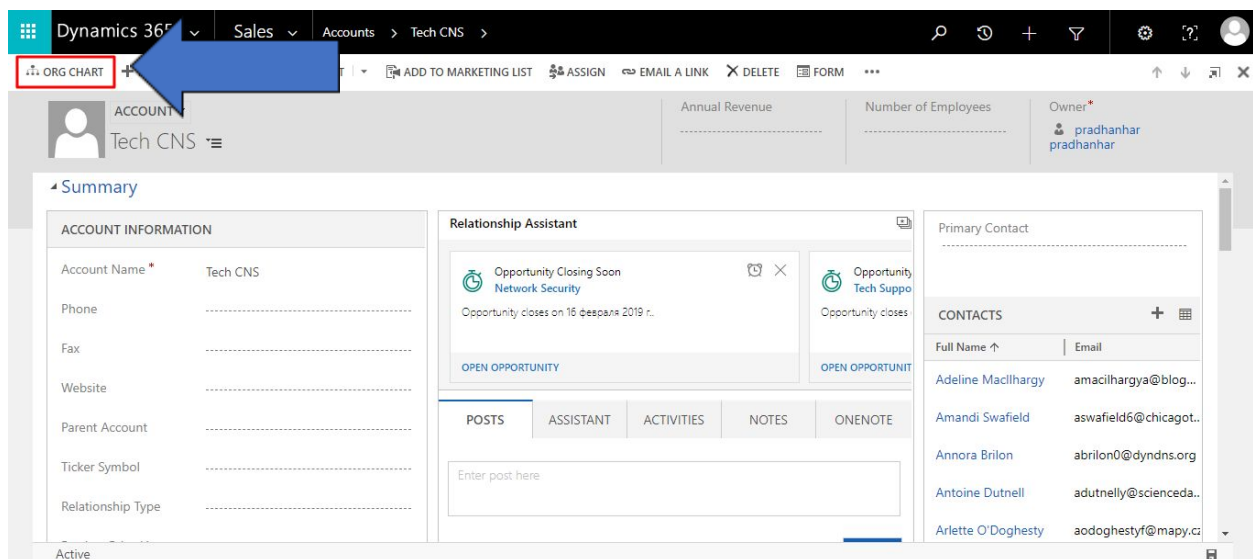
The Org Chart app by DemandFarm offers a single page view of all contacts within an account and helps nurture the right relationships with the right people using simple and interactive features.

Org Chart allows users to build a hierarchical **chart** for their accounts via an easy '**Drag & Drop**' feature, provided in the Org Chart builder interface, to create a hierarchical structure for an account to help them identify key contacts within the organization, their awareness about services you offer and whether they are your 'Champions' or 'Detractors'.

Navigating to Org Chart in MS Dynamics- Classic mode

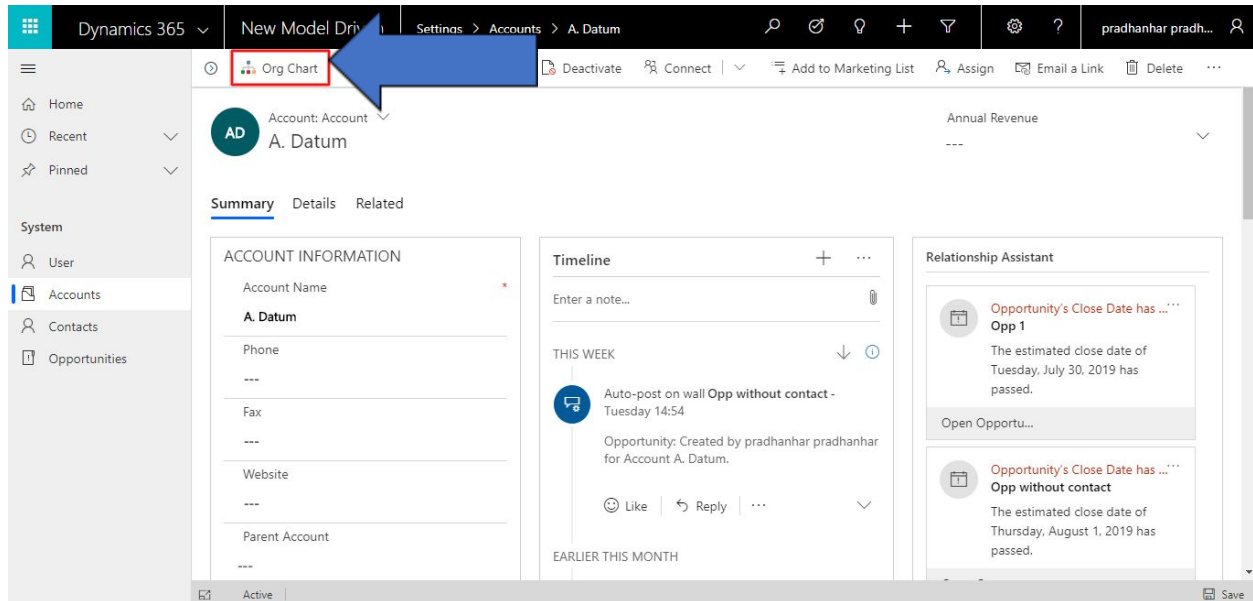
To access the Org Chart app on Microsoft Dynamics, navigate to the 'Accounts' tab on the Dynamics dashboard and select the account you wish to view.

Click the 'Org Chart' button in the top left corner of the screen to access the application for this account.



Org Chart Navigation

Navigating to Org Chart in MS Dynamics-Unified Interface



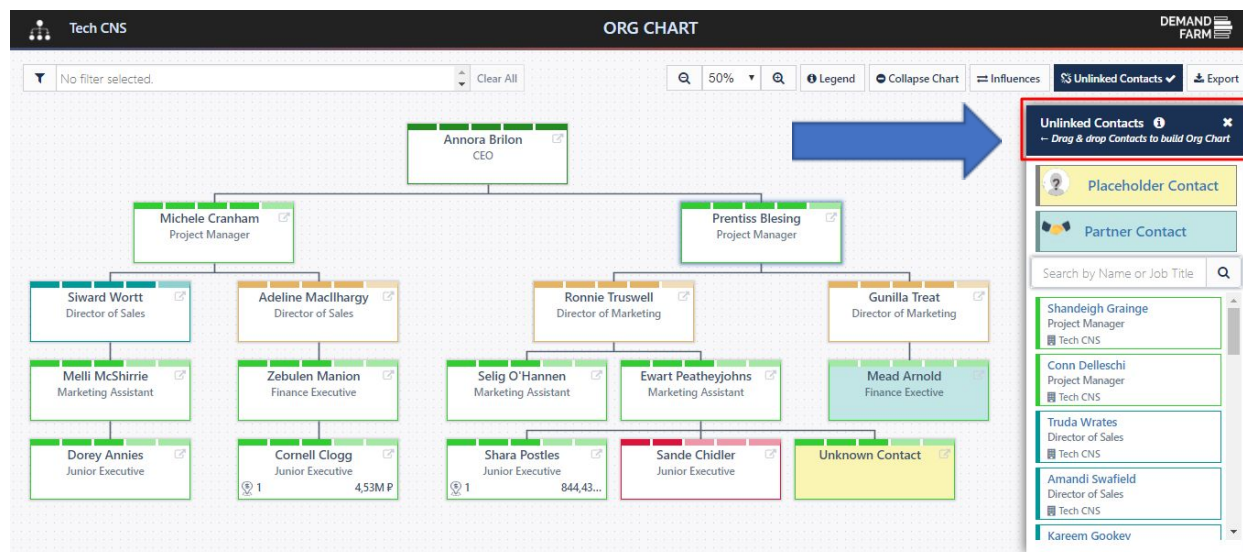
Org Chart Navigation

Create the Org Chart

Builder Canvas

When launched for the first time, users start off on a blank canvas, with a list of unlinked contacts provided on the right-hand side of this screen, which will eventually be used to populate the hierarchical chart.

Features of Org Chart become usable once users have built the hierarchical structure in the builder canvas.

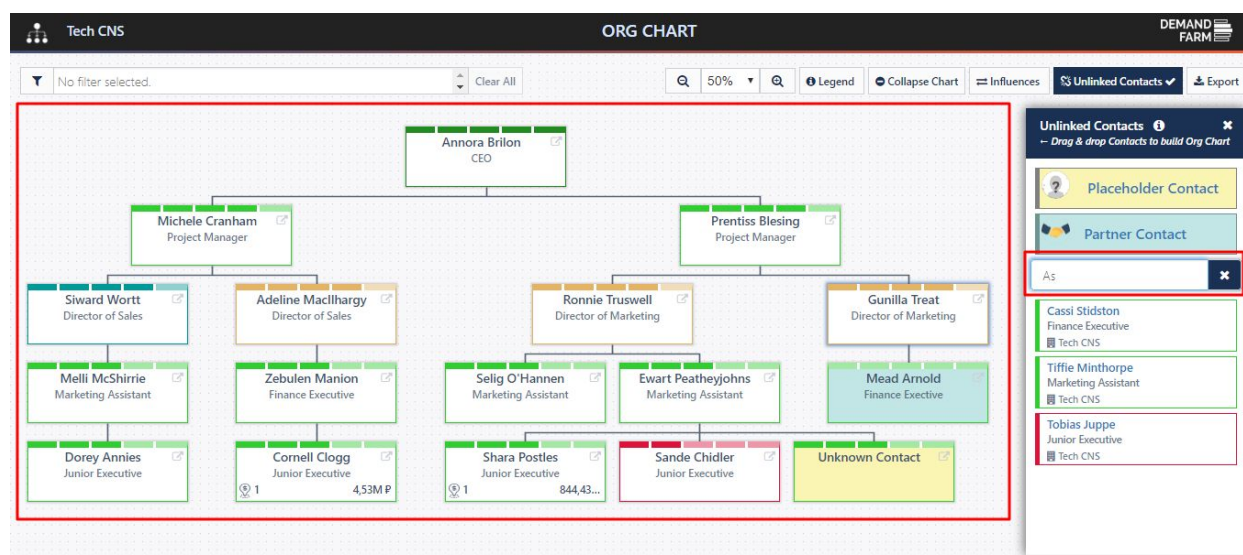


Unlinked Contacts

Buttons in the action panel providing options/features namely **Legend**, **Collapse Chart**, **Influences**, **Unlinked Contacts** and **Export** are disabled when the canvas is empty.

Using the search panel provided in the unlinked contacts section, contacts can be filtered and searched individually. These contacts can be filtered by '**First/Last**' Name and/or the '**Job title**'.

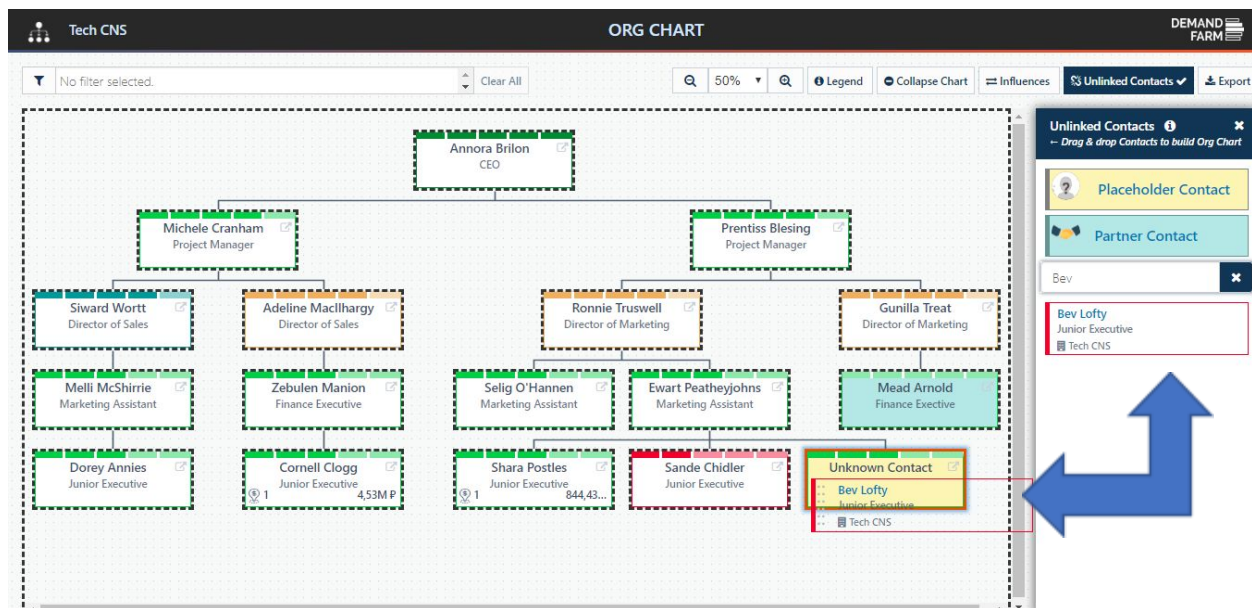
Unlinked contacts are automatically available if the contacts have been added to the account in Dynamics CRM.



Contact Search in Unlinked Contacts Section

To start building the Org Chart, simply drag & drop contacts from the unlinked contacts section onto the builder canvas to create the hierarchical chart of the account, based on knowledge, background, strategies and action plans.

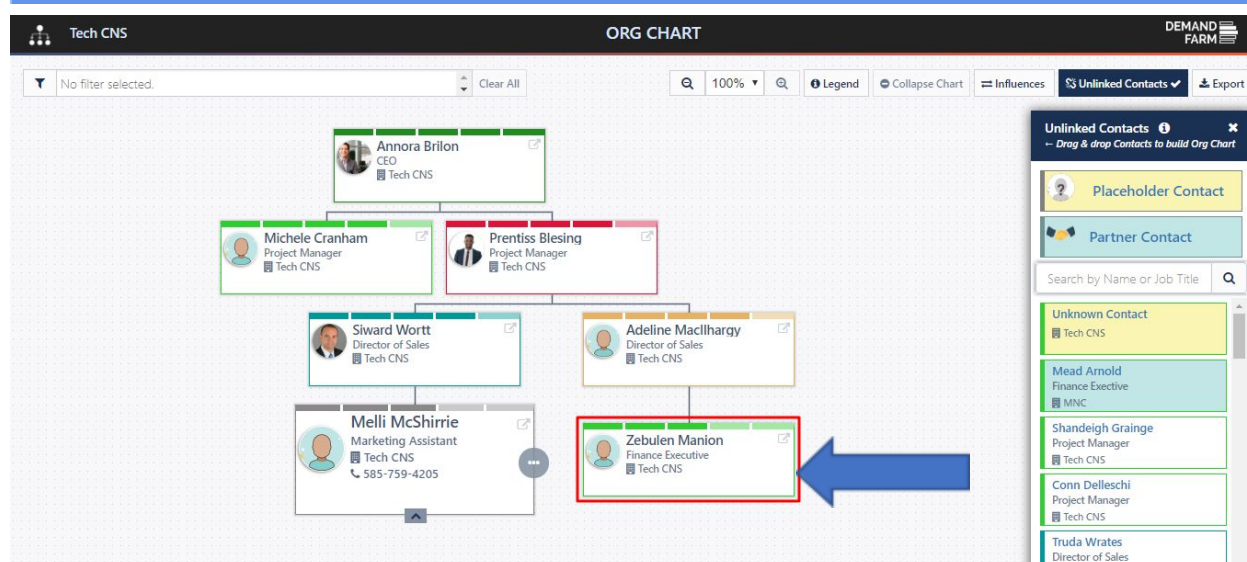
The Org Chart interface can also be auto-populated if the 'Reports to' field in the contact detail section is defined for any contact.



'Drag & Drop' to complete the Chart

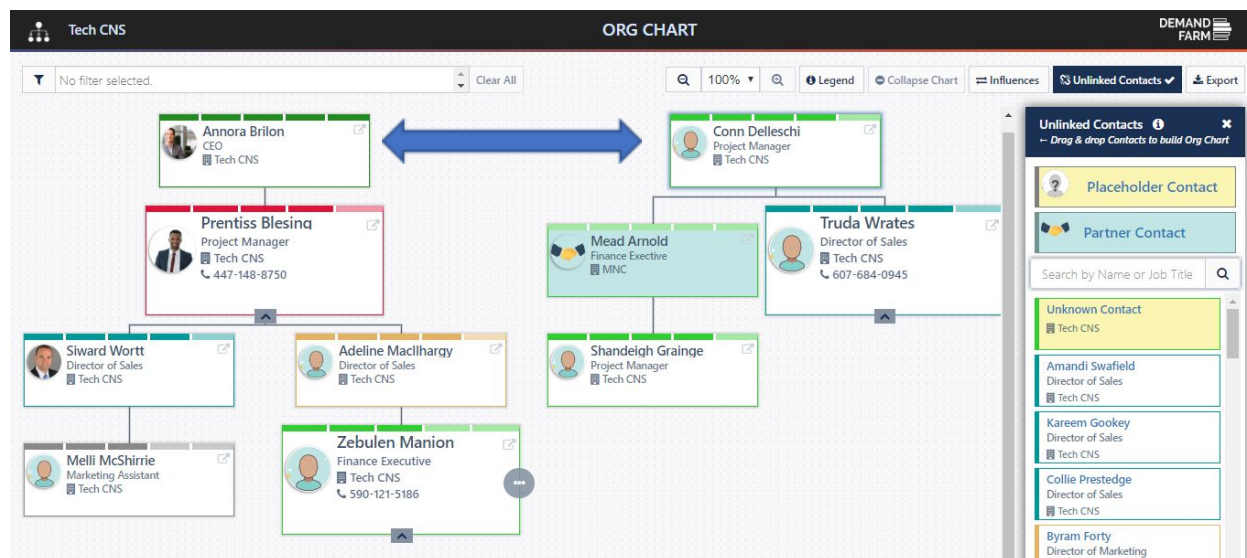
Unlinked contacts can also be dropped onto other contacts already present in the canvas, providing users the ease of mapping the organizational hierarchy or structure as they find suitable.

Users can build the Org Chart by dragging contacts from the 'Unlinked Contacts' section and dropping the contact directly on to the builder canvas or onto other contact cards already present in the OrgChart, thereby allowing users to create the desired hierarchy.



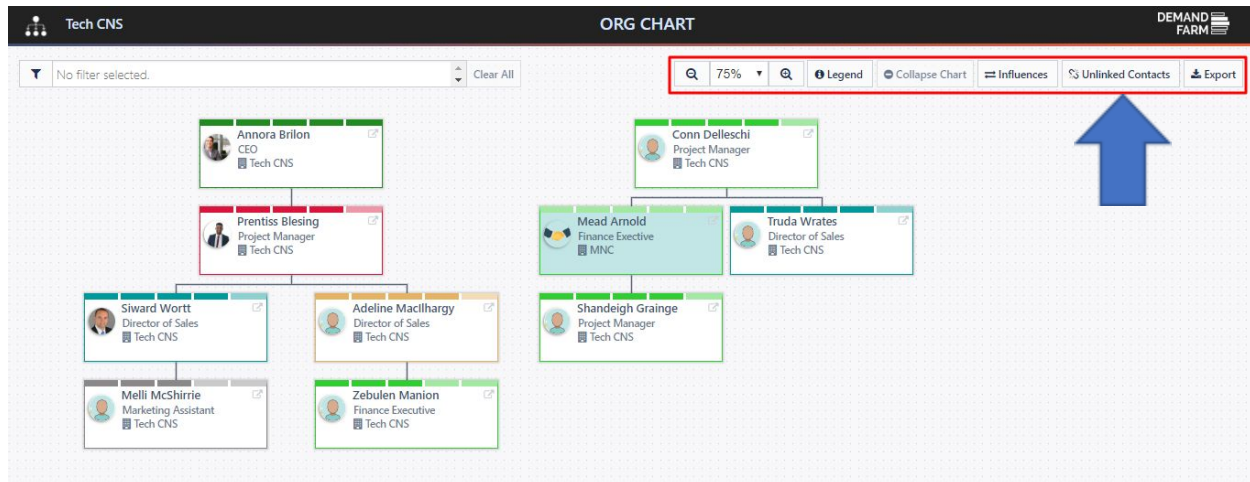
Build Chart as per desired hierarchy

Multiple hierarchies can also be created within the Org Chart canvas, depending on the structural understanding of the account.



Multiple hierarchies within a single account

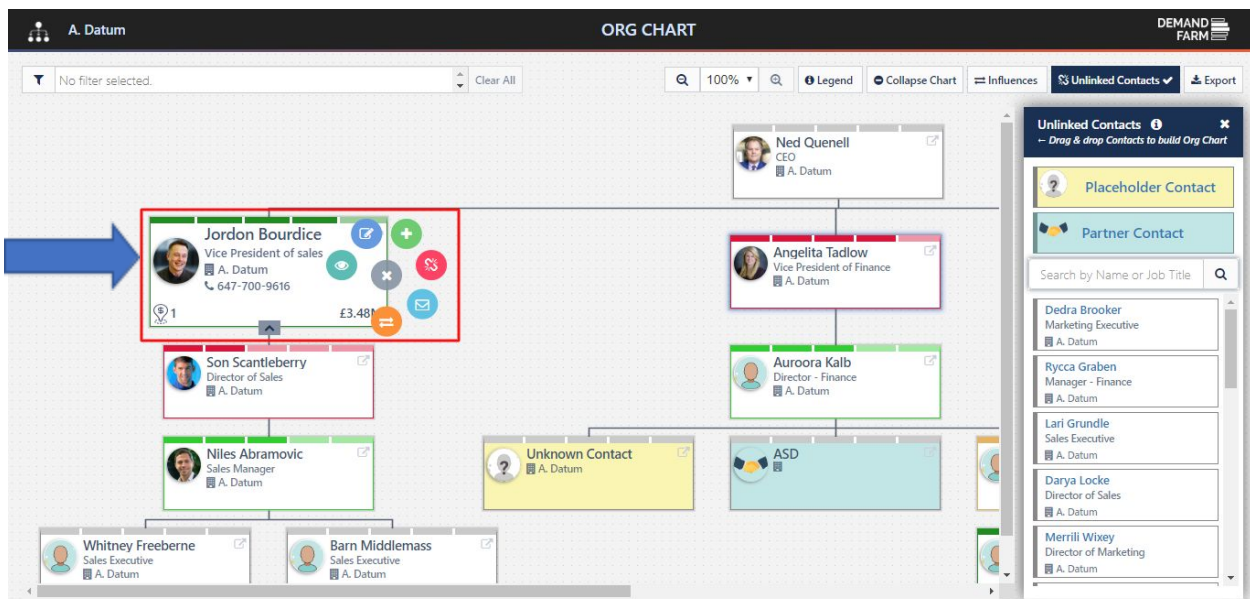
Feature buttons; **'Collapse/Expand'**, **'Influences'** and **'Export'** are enabled when contacts are present in Org Chart canvas.



Action Panel

Editing in Org Chart- Classic mode

Org Chart saves users valuable time by providing an option to quick edit contact details directly from the builder canvas interface.



Contact Cards

Contact Cards

Contact cards on the canvas provide users the option to update details, influences, level, etc. directly from the contact card present in the builder interface.

Clicking any contact card expands it and provides options to edit and update relevant contact information.

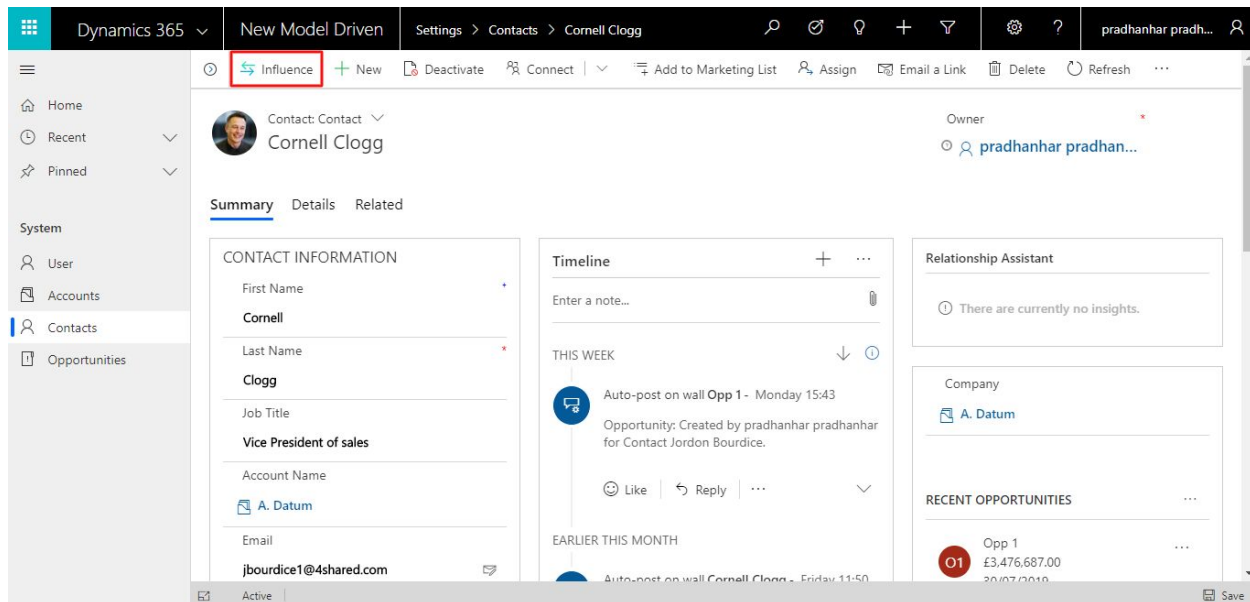
Open Selected Contact

The image illustrates the process of opening a selected contact from the Org Chart canvas. On the left, a contact card for **Cornell Clogg** (Junior Executive, Tech CNS, 160-650-4113) is shown on a canvas. A red box highlights the edit icon (a square with a pencil) in the top right corner of the card. A blue arrow points from this icon to a text box on the right that says "Open selected contact in a new window." Below the canvas, a screenshot of the Dynamics 365 interface shows the contact's expanded view in a new browser window. The window title is "Contact: Cornell Clogg - Google Chrome". The URL is <https://oc4demo.crm4.dynamics.com/main.aspx?etc=2&extraqs=%3fetc%3d2%26id%3d1d750d06-872e-e911-a81b-000d3ab1c09c&histKey=659451988&newWf...>. The interface shows the contact's details, including Full Name (Cornell Clogg), Job Title (Junior Executive), Account Name (Tech CNS), Email (cclogg@latimes.com), and Business Phone (160-650-4113). The contact is marked as "Active". The right sidebar shows the "Summary" tab with a "POSTS" section and a "Network Security" opportunity created by pradhanhar pradhanhar for Contact Cornell Clogg.

Open Contact from Org Chart

Navigating to Influences from Contact

Influences will open a popup on different window. Using toggle button user can search Contacts by Contact Name or Job Title. User can set influences for Contact as well as Partner Contact.



Open Influence from contact

Quick Edit Contact button



The following 'dialogue box' allows user to edit/update contacts. The edit contact feature allows you to update/add necessary information without having to switch tabs or windows.

Edit Contact

First Name: Cornell

Last Name: Clogg

Job Title: Junior Executive

Email: cclogg@latimes.com

Account Name: Tech CNS

Business Phone: 160-650-4113

Currency: рубль

Budget Controlled

Level: Operations

Status: Aware Positive

Power Meter: Moderate

Power Meter: Very Low, Low, Moderate, High, Very High

Cancel Save

Contact Update through Card View

All changes made here are reflect directly in the Org Chart.

Add Subordinate

Cornell Clogg
Vice President of sales
A. Datum
647-700-9616

£3.48M

1

Add a New contact in the OrgChart hierarchy as a subordinate to selected contact

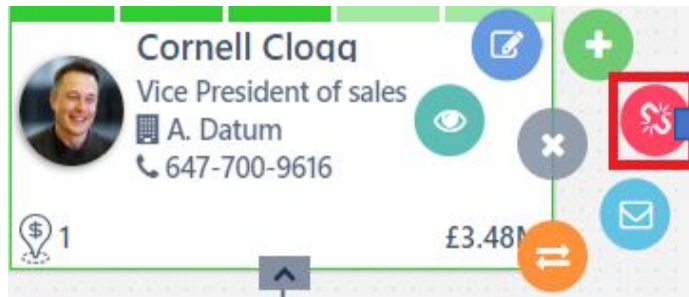
This opens a new dialogue box as displayed. The contact created from this dialogue box is automatically assigned as a subordinate to that specific contact. Example any contact added

from **Cornell** contact card would automatically report to **Cornell Clogg** and would show accordingly on the canvas.

The screenshot displays the Dynamics 365 Org Chart interface. On the left, an org chart shows a hierarchy with 'Cornell Clogg' (Junior Executive, Tech CNS) highlighted. A red box highlights the 'Add New Contact' button next to his card. On the right, the 'New Contact' form is open, showing fields for Full Name, Job Title, Account Name (set to Tech CNS), Email, Business Phone, and Mobile Phone. A 'Summary' tab is active, showing a 'First Name' and 'Last Name' field. The form is titled 'CONTACT New Contact' and includes a 'Done' button.

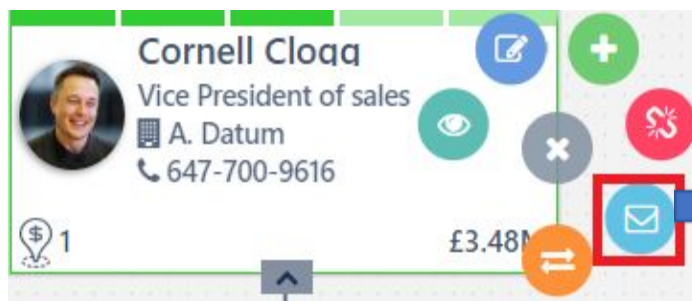
Quick Add New Contacts

Unlink Contact button



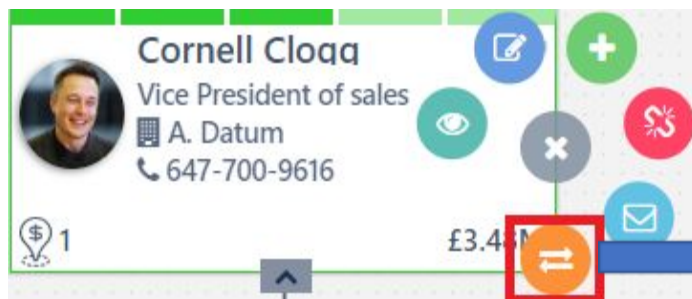
Send selected contact on the canvas builder, back to the Unlinked contact section.

Email Button



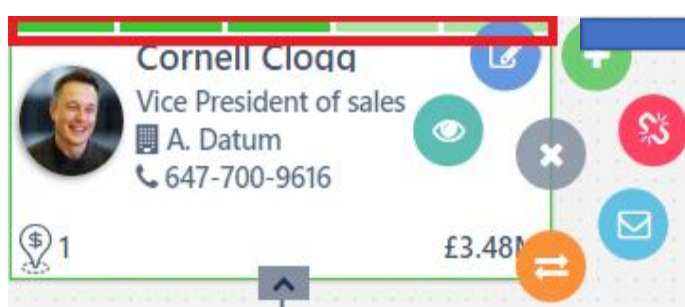
Use to send an Emails to this contact.

Influence



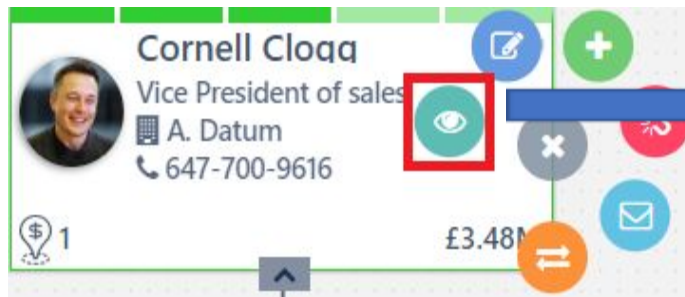
Update influence for relevant contacts in OrgChart.

Power Meter



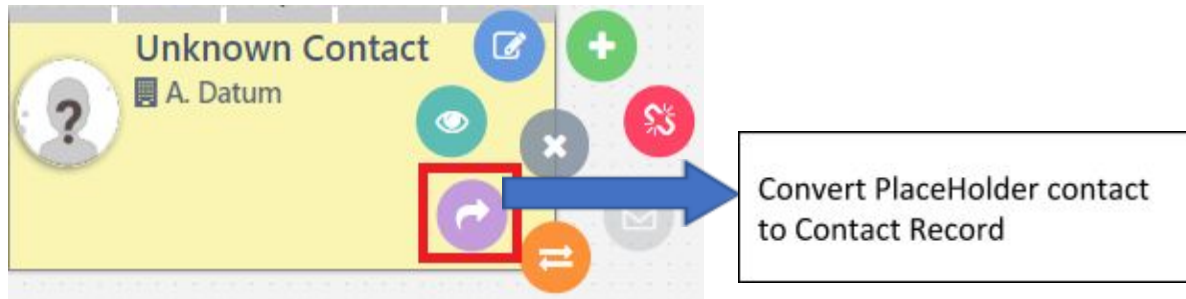
Power meter value from Very Low, Low, Moderate, High, to Very High quantifying relationship strengths with selected contact. Default value is No Power

Influences for the relevant contact



Influences for this contact shows the only that contact related influence.

Convert to Contact



Opportunities and Budget Controlled

Bottom panel of contact card shows icon dollar point, denoting the number of opportunities this contact is associated with & the budget controlled by the selected contact.



Update Influences

Update Influences will open a popup on same window. Using toggle button user can search Contacts by Contact Name or Job Title. User can set influences for Contact as well as Partner Contact.

Update Cornell Clogg Influences

Search Contacts by Name or Job Title









Q

X

Search For

Contacts

Partner Contacts

	NAME	ACCOUNT	STATUS	JOB TITLE	INFLUENCE	ACTION
<input type="checkbox"/>	 Annora Brilon	Tech CNS	Champion	CEO		<div>Mark Positive</div> <div>Mark Negative</div>
<input type="checkbox"/>	 Michele Cranham	Tech CNS	Aware Positive	Project Manager	Positive	<div>Clear</div> <div>Mark Negative</div>
<input type="checkbox"/>	 Shandeigh Grainge	Tech CNS	Aware Positive	Project Manager		<div>Mark Positive</div> <div>Mark Negative</div>
<input type="checkbox"/>	 Prentiss Blesing	Tech CNS	Aware Negative	Project Manager	Negative	<div>Clear</div> <div>Mark Positive</div>
<input type="checkbox"/>	 Conn Delleschi	Tech CNS	Aware Positive	Project Manager		<div>Mark Positive</div> <div>Mark Negative</div>
<input type="checkbox"/>	 Truda Wrates	Tech CNS	Aware Neutral	Director of Sales	Negative	<div>Clear</div> <div>Mark Positive</div>
<input type="checkbox"/>	 Amandi Swafield	Tech CNS	Aware Neutral	Director of Sales		<div>Mark Positive</div> <div>Mark Negative</div>
<input type="checkbox"/>	 Siward Wortt	Tech CNS	Aware Neutral	Director of Sales	Positive	<div>Clear</div> <div>Mark Negative</div>

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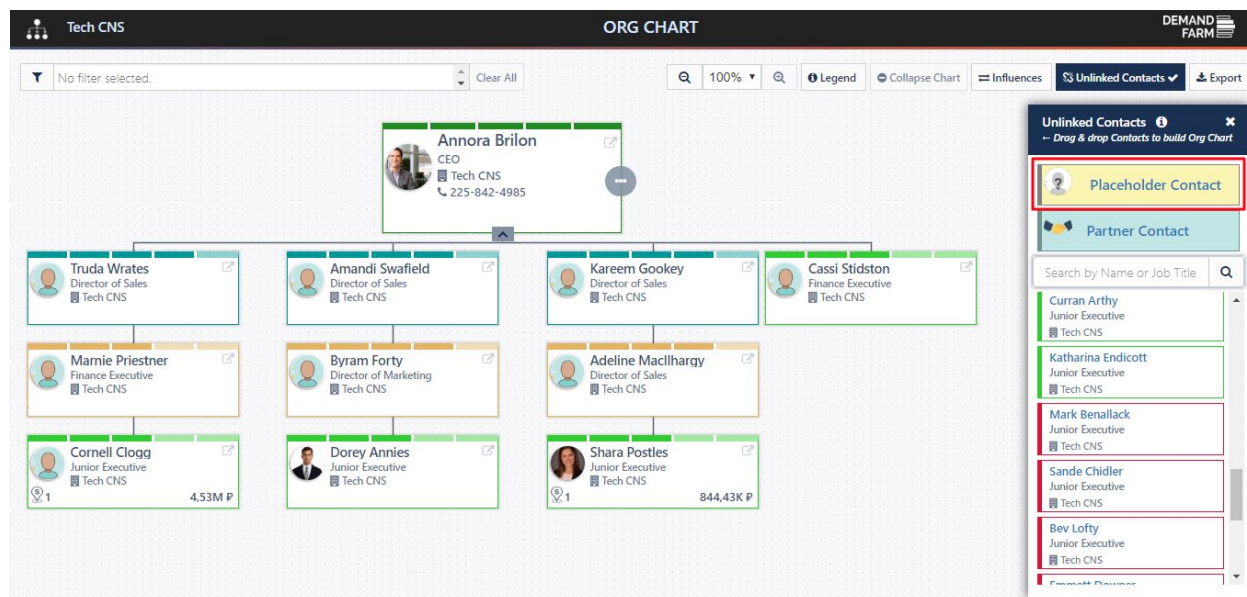
>

»

Close

Placeholder Contact

User can add Placeholder Contact(Unknown Contact) in Org Chart,simply drag & drop Placeholder Contact from the unlinked Contacts section. After Drag & Drop Create Placeholder Contact window will be opened and user will allow to fill only those fields which he know about that Unknown Contact then click on Create And Attach, the Placeholder contact will be added in canvas.

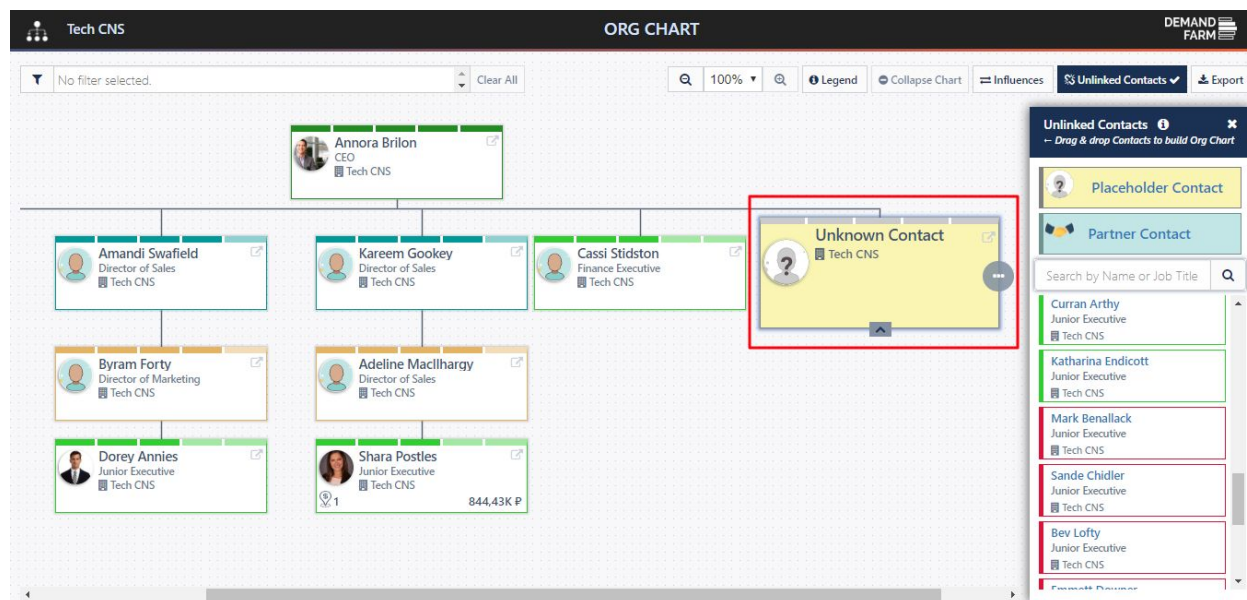


Create Placeholder Contact

Name	Job Title
Unknown Contact	
Account Name	ReportsTo
Tech CNS	Annora Brilon
Level	Status
No Level	No Status
Power Meter	
No power	
Power Meter ⓘ	
Very Low Low Moderate High Very High	

Cancel Create And Attach

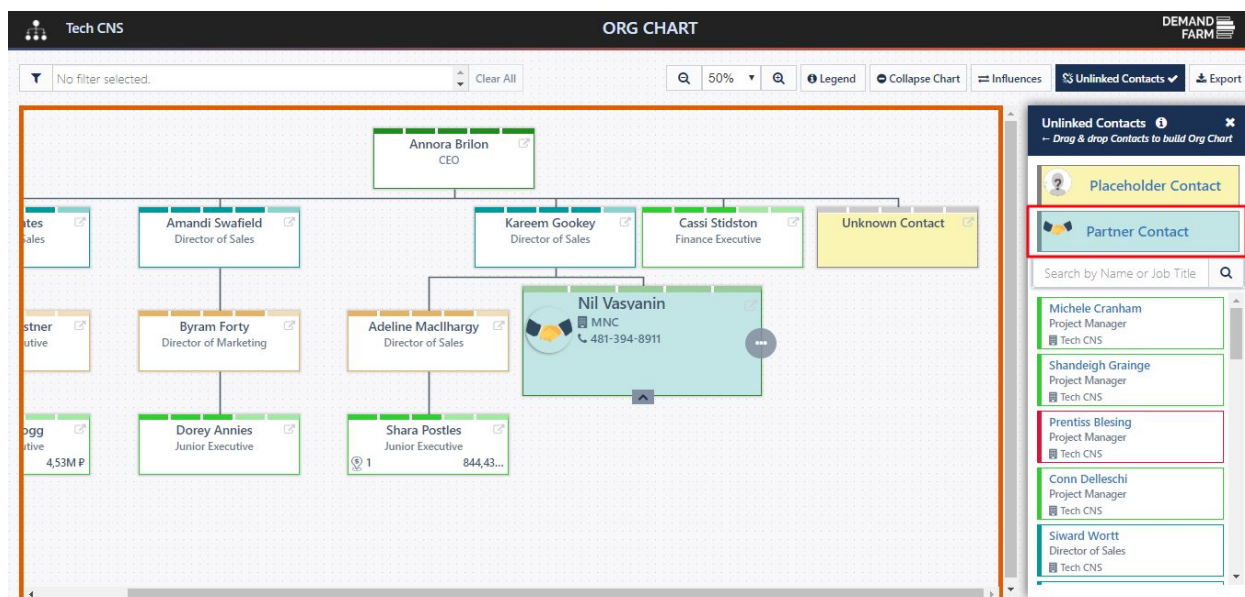
The Placeholder Contact will be highlighted separately in Org Chart.



User can convert Unknown Contact to Contact record when the details are available by clicking on [Convert to Contact](#) button available in menu option on Unknown Contact node. All fields of Unknown Contact like Name, Job Title, Status, Power Meter must be displayed same on a converted Contact record. After conversion Unknown Contact will be replaced by newly created Contact in the Org Chart.

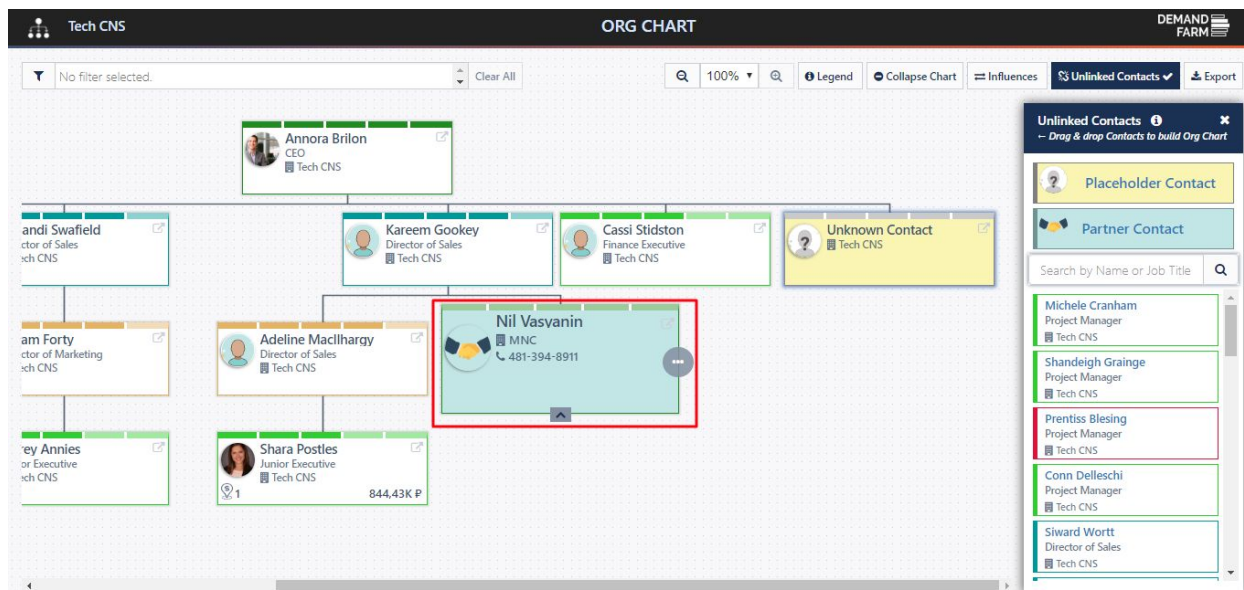
Partner Contact

User can add Partner/External Contact(Contacts that are not part of the same account) in Org Chart, simply drag & drop Partner Contact from the unlinked contacts section then **Add Partner Contact** window will open search a Account or Contact and then click on Select And Attach button, that External Contact will be added in Org Chart canvas.



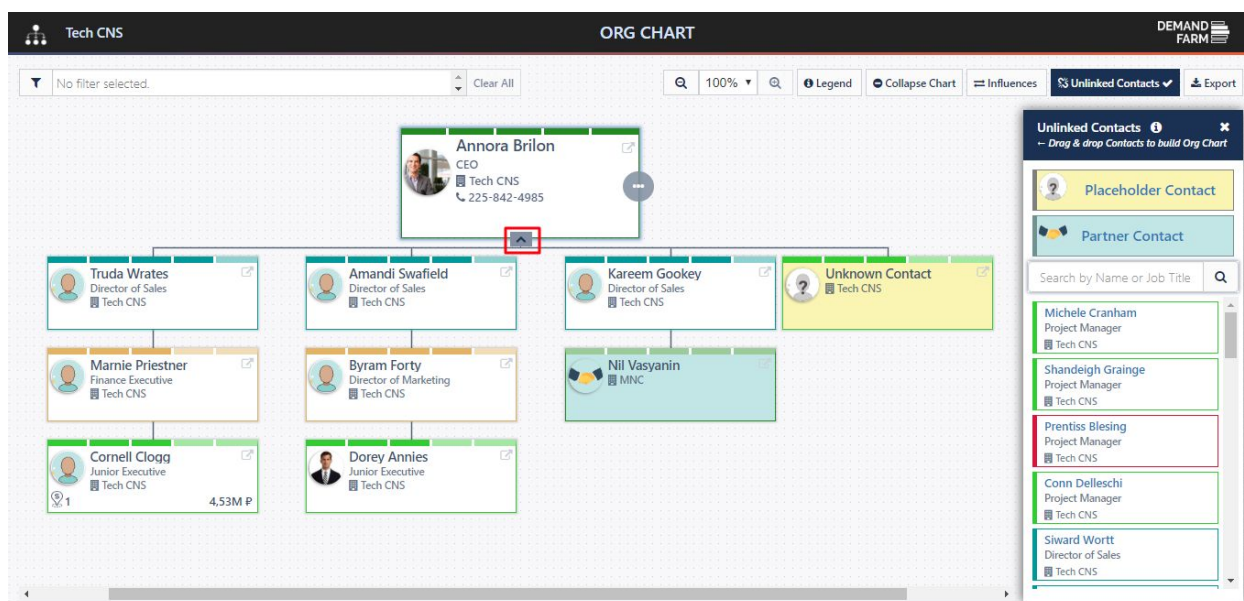
The 'Add Partner Contact' dialog box is shown. It has a dark blue header with the title 'Add Partner Contact' and a close button. The form contains three main sections: 'Name' with a text input field containing 'External Contact'; 'Account' with a dropdown menu showing 'Search Account by name. Start typing...'; and 'Contact *' with a dropdown menu showing 'Search Partner Contact by name. Start typing...'. At the bottom right, there are two buttons: 'Cancel' and 'Select And Attach'.

The Partner Contact will be highlighted separately in Org Chart.

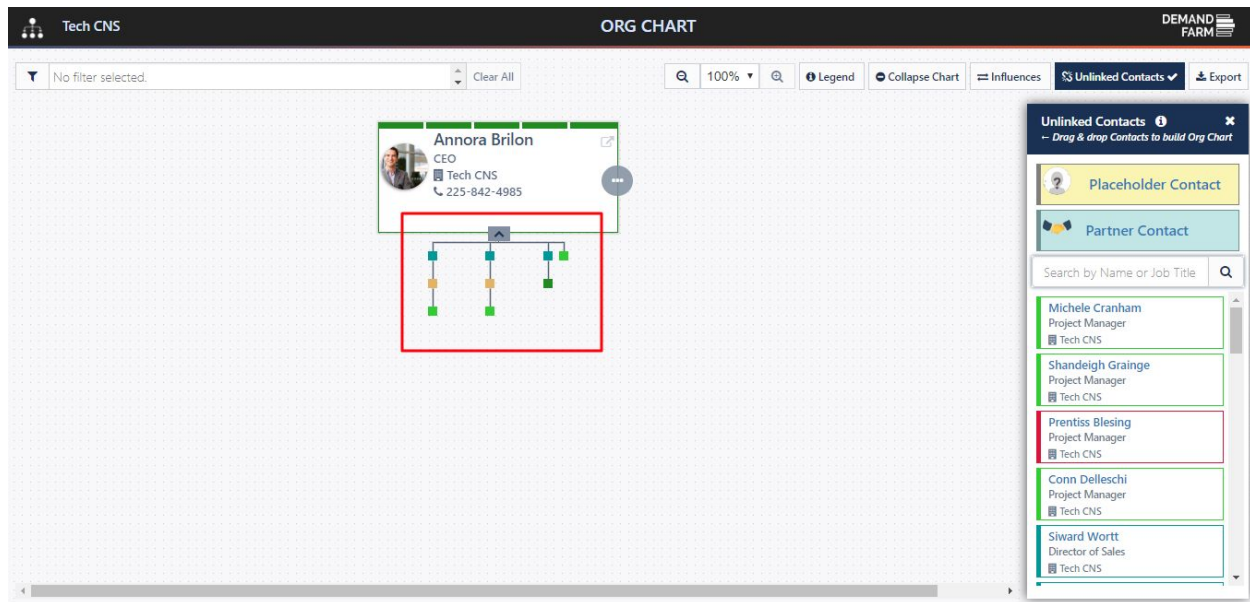


Expand/Collapse for individual nodes

The Expand/Collapse button should be visible after the click on Contact card. It will only work when No Filter applied on Org Chart.



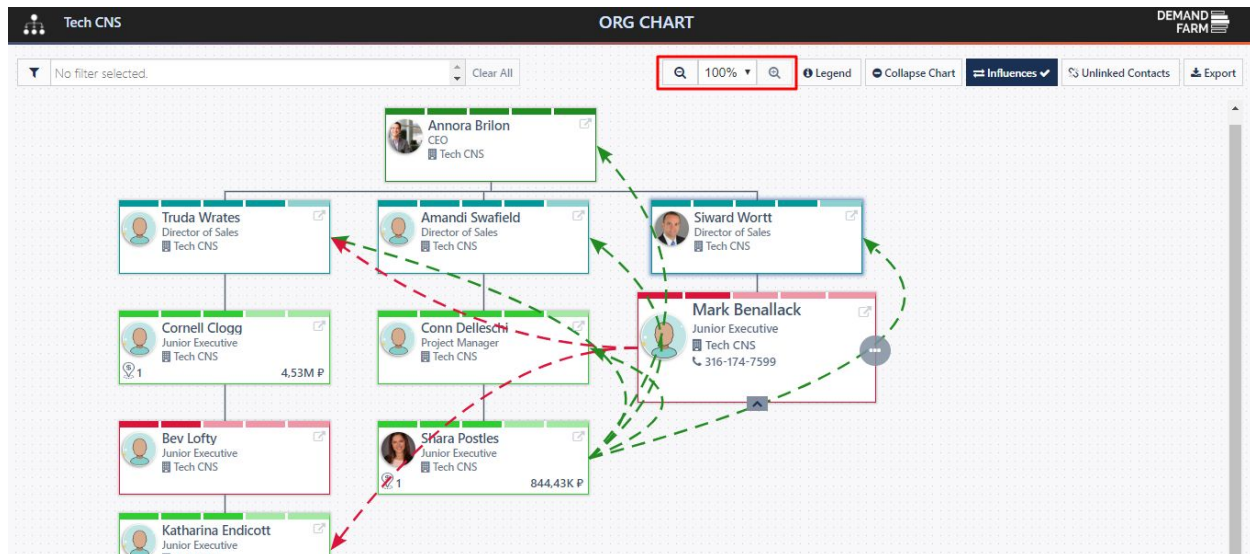
All the Child Contact will be Collapse after click on Expand/Collapse button from Parent contact node.



Action Panel

Zoom

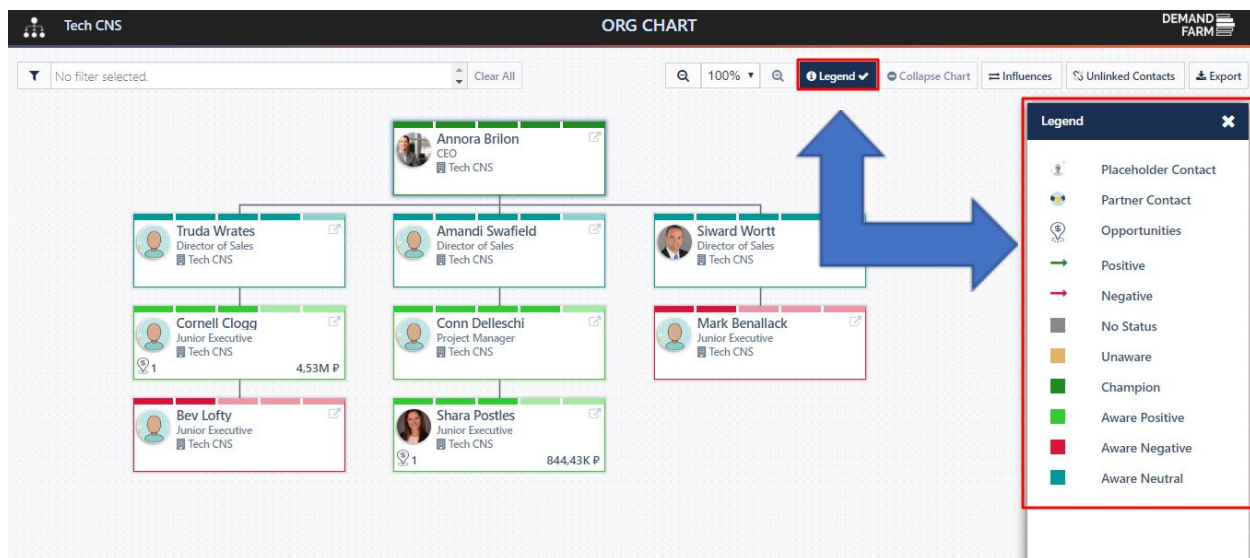
Use the magnifying glass to enlarge or minimize the org chart by varying specified size ratios (25%-100%).



Zoom in/Zoom out

Legend

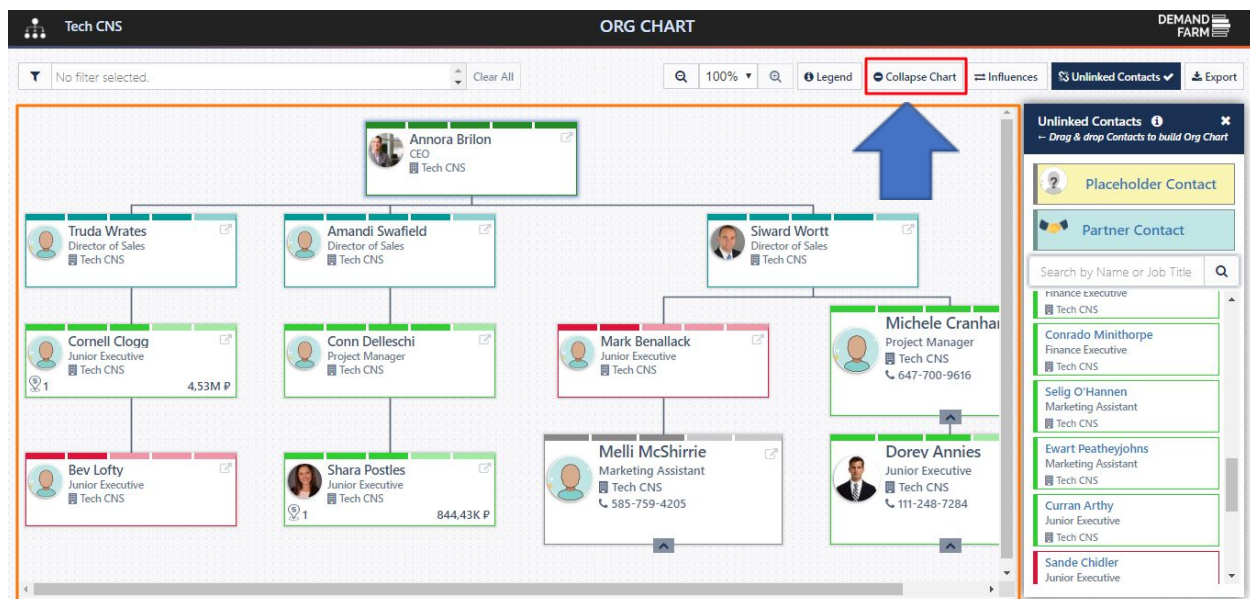
Click 'Legend' to understand the various established color codes & markers used for different statuses and symbols used in Org Chart.



Legend

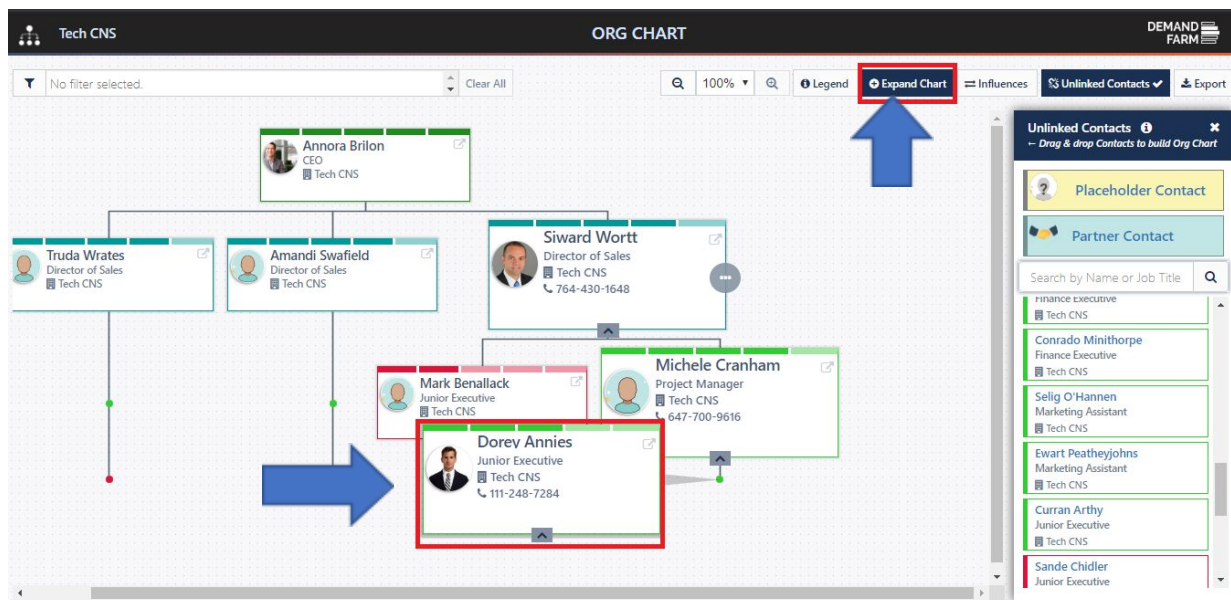
Collapse/Expand

The **'Collapse/Expand'** button can be used to view larger organizational structures in a compact layout (based on the level defined for the contact) if the account contains too many contacts.



Collapse/Expand

Hovering over any collapsed contact node displays the specific contact as a quick view. Org Chart users can toggle between these views as they wish, by clicking the **'Collapse/Expand'** button again.



Collapsed Chart nodes

Influences

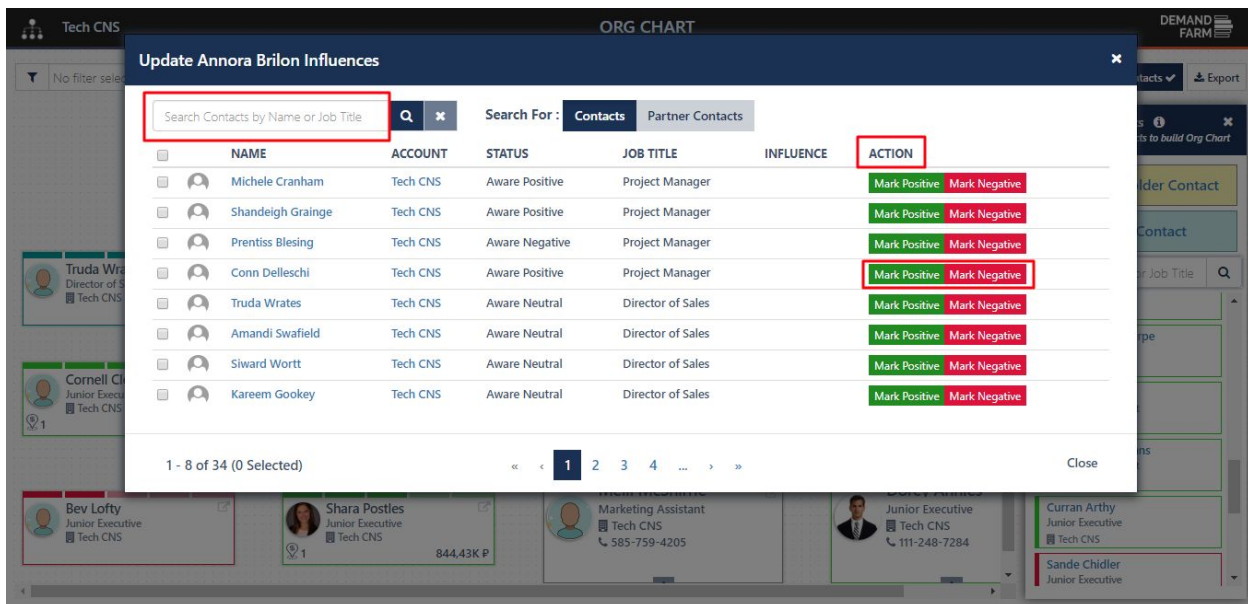
To utilize the influences feature, the users would first need to update influences for the contacts. Users can set influence by clicking on the **'Set influences'** option from a contact card.

Follow these steps to update Influences:

- Navigate to any contact card on the canvas builder.
- Click on the influences button.

This launches a new tab where the user can mark influences for the contact as **'Positive'** or **'Negative'** in the **'Action'** column provided in the update influence table. An option to filter contacts as per **First/Last** name and **Job title** is also available in the same window.

Using the influence feature, positive or negative influence/influencers can be identified and denoted. These arrows point towards the contact card upon whom the former has positive or negative impact.



Update Annora Brilon Influences

Search Contacts by Name or Job Title

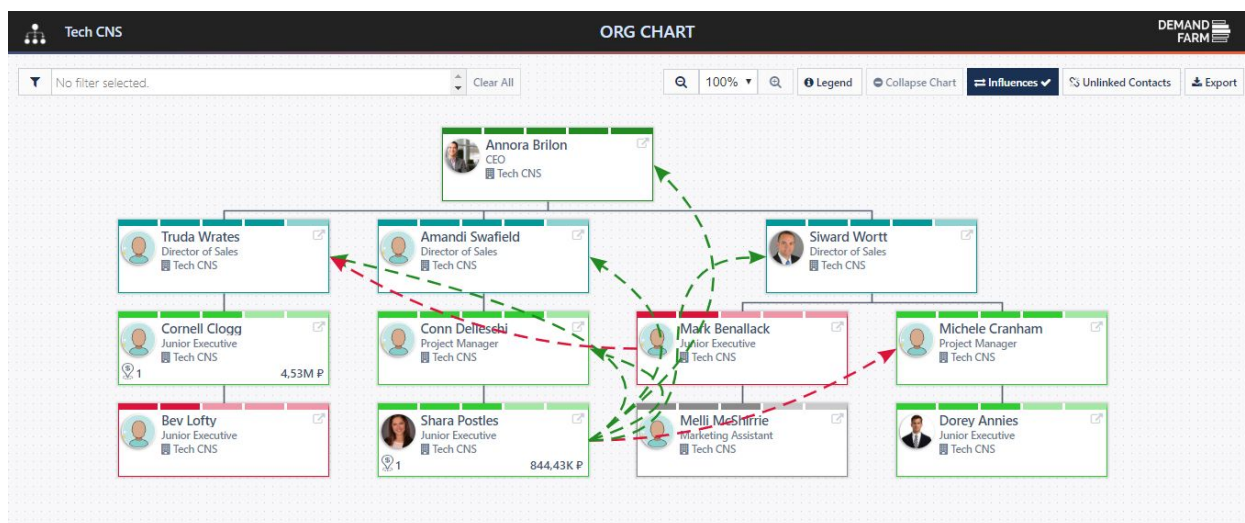
Search For: **Contacts** Partner Contacts

NAME	ACCOUNT	STATUS	JOB TITLE	INFLUENCE	ACTION
Michele Cranham	Tech CNS	Aware Positive	Project Manager		Mark Positive Mark Negative
Shandeigh Grainge	Tech CNS	Aware Positive	Project Manager		Mark Positive Mark Negative
Prentiss Blesing	Tech CNS	Aware Negative	Project Manager		Mark Positive Mark Negative
Conn Delleschi	Tech CNS	Aware Positive	Project Manager		Mark Positive Mark Negative
Truda Wrates	Tech CNS	Aware Neutral	Director of Sales		Mark Positive Mark Negative
Amandi Swafield	Tech CNS	Aware Neutral	Director of Sales		Mark Positive Mark Negative
Siward Wortt	Tech CNS	Aware Neutral	Director of Sales		Mark Positive Mark Negative
Kareem Gookey	Tech CNS	Aware Neutral	Director of Sales		Mark Positive Mark Negative

1 - 8 of 34 (0 Selected) ...

Update influences

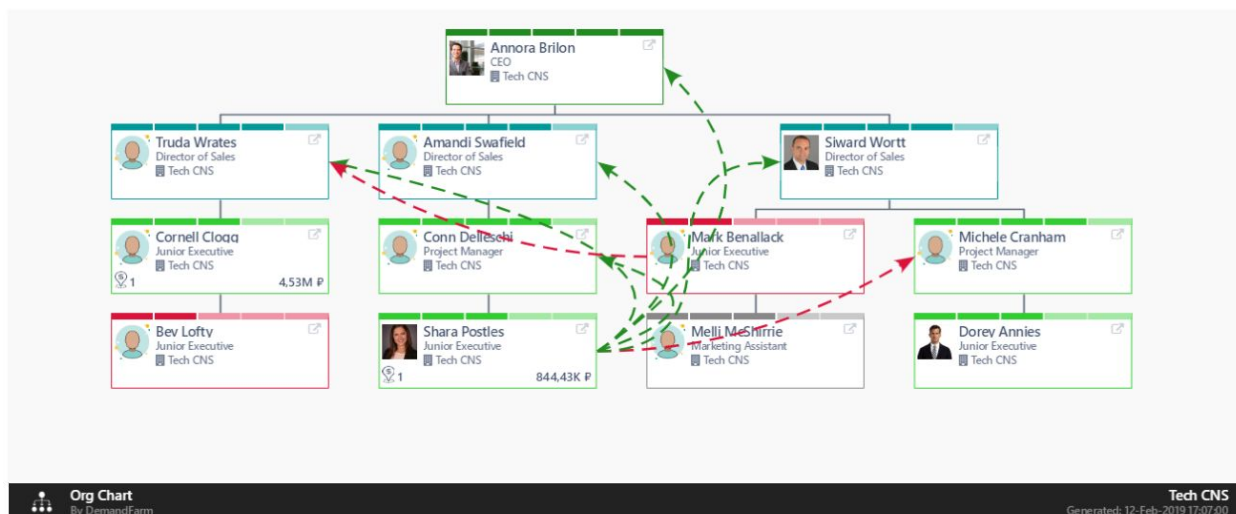
Clicking the **'Influences'** button now shows the impact or effect of the contact on another, in the form of green or red dotted arrows, denoting positive and negative influence respectively,



Influence within the Org

Export

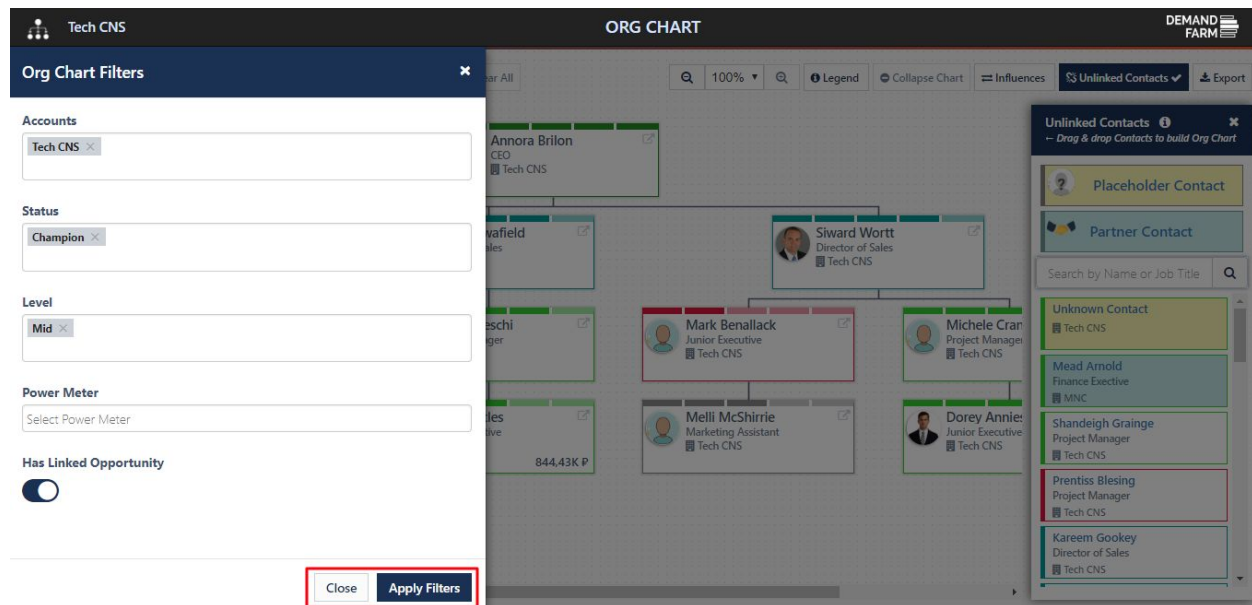
The OrgChart built by users can be downloaded/exported by clicking on **'Export'** button and can easily be downloaded as a sharable (.PNG) image file in a single click.



Org Chart (.png) Export

Filters

Contacts within Org Chart can be selected or filtered with great ease in the app using the following criteria.



Filters in Org Chart

Click 'Apply Filters' after mentioning the criteria to see the desired accounts on the builder canvas.

Account/Sub-Account Filter

The screenshot shows the 'Org Chart Filters' dialog box. It has a dark blue header with the title 'Org Chart Filters' and a close button (X). Below the header, there are four filter sections: 'Accounts', 'Level', 'Power Meter', and 'Has Linked Opportunity'. The 'Accounts' section is highlighted with a red border and contains a search input field with the placeholder text 'Select Account or SubAccount'. Below the input field, there are two options: 'Tech CNS' (highlighted in dark blue) and 'MNC' (in white). A blue arrow points from the 'Accounts' section to a callout box on the right. The callout box contains the text: 'Provides an option to search contacts within a specific account by searching them using the name of the said 'Account' or 'Sub account''. Below the filter sections, there are two buttons: 'Close' and 'Apply Filters'.

Org Chart Filters X

Accounts

Select Account or SubAccount

Tech CNS

MNC

Level

Select Level

Power Meter

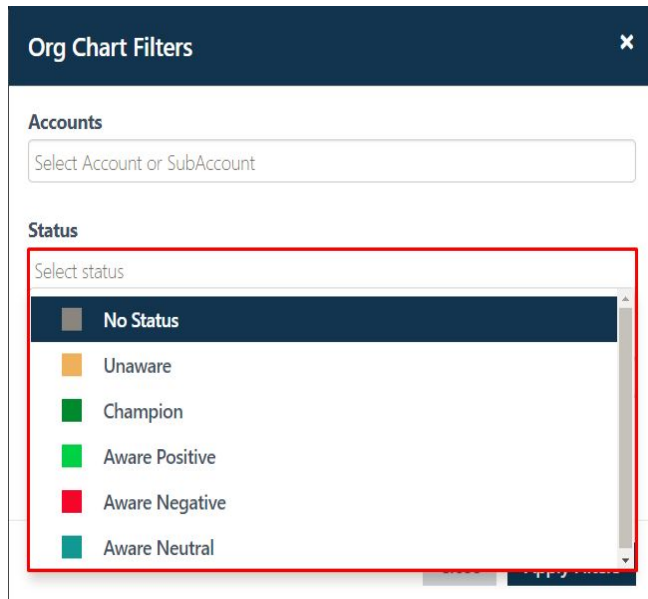
Select Power Meter

Has Linked Opportunity

Close Apply Filters

Provides an option to search contacts within a specific account by searching them using the name of the said 'Account' or 'Sub account'

Contact Status

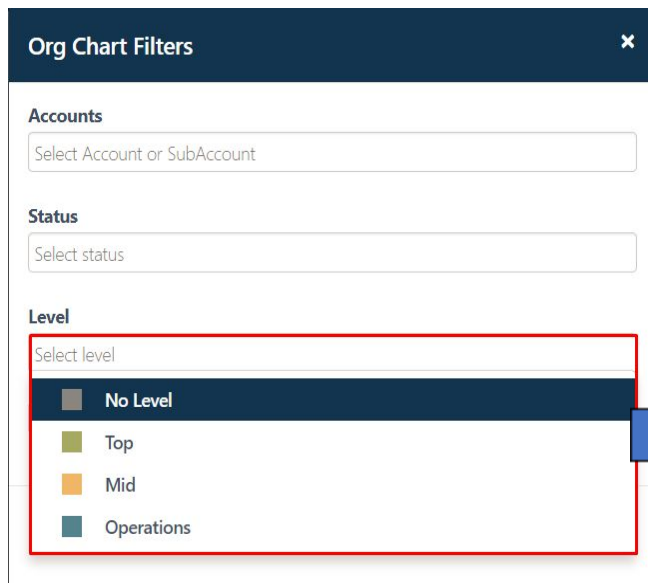


The screenshot shows the 'Org Chart Filters' dialog box. It has a dark blue header with the title 'Org Chart Filters' and a close button. Below the header, there are two sections: 'Accounts' and 'Status'. The 'Accounts' section has a text input field with the placeholder 'Select Account or SubAccount'. The 'Status' section has a dropdown menu with the placeholder 'Select status'. The dropdown menu is open, showing a list of status options with corresponding colored squares: 'No Status' (dark blue), 'Unaware' (orange), 'Champion' (green), 'Aware Positive' (light green), 'Aware Negative' (red), and 'Aware Neutral' (teal). A red rectangular box highlights the dropdown menu.



Filters contacts using assigned contact status as criterion.

Contact Level



The screenshot shows the 'Org Chart Filters' dialog box. It has a dark blue header with the title 'Org Chart Filters' and a close button. Below the header, there are three sections: 'Accounts', 'Status', and 'Level'. The 'Accounts' section has a text input field with the placeholder 'Select Account or SubAccount'. The 'Status' section has a dropdown menu with the placeholder 'Select status'. The 'Level' section has a dropdown menu with the placeholder 'Select level'. The dropdown menu is open, showing a list of level options with corresponding colored squares: 'No Level' (dark blue), 'Top' (olive green), 'Mid' (orange), and 'Operations' (teal). A red rectangular box highlights the dropdown menu.



Filters contacts using Assigned contact level as criterion.

Power Meter

Org Chart Filters ×

Accounts

Status

Level

Power Meter

- ☒ No power
- ☐ Very Low
- ☐ Low
- ☐ Moderate
- ☐ High
- ☐ Very High



Filters contacts using Assigned Power Meter as criterion.

Has linked Opportunity

Org Chart Filters ×

Accounts

Status

Level

Power Meter

Has Linked Opportunity
☒

Toggle the button would select and show accounts or contacts that are linked to one or more opportunities.



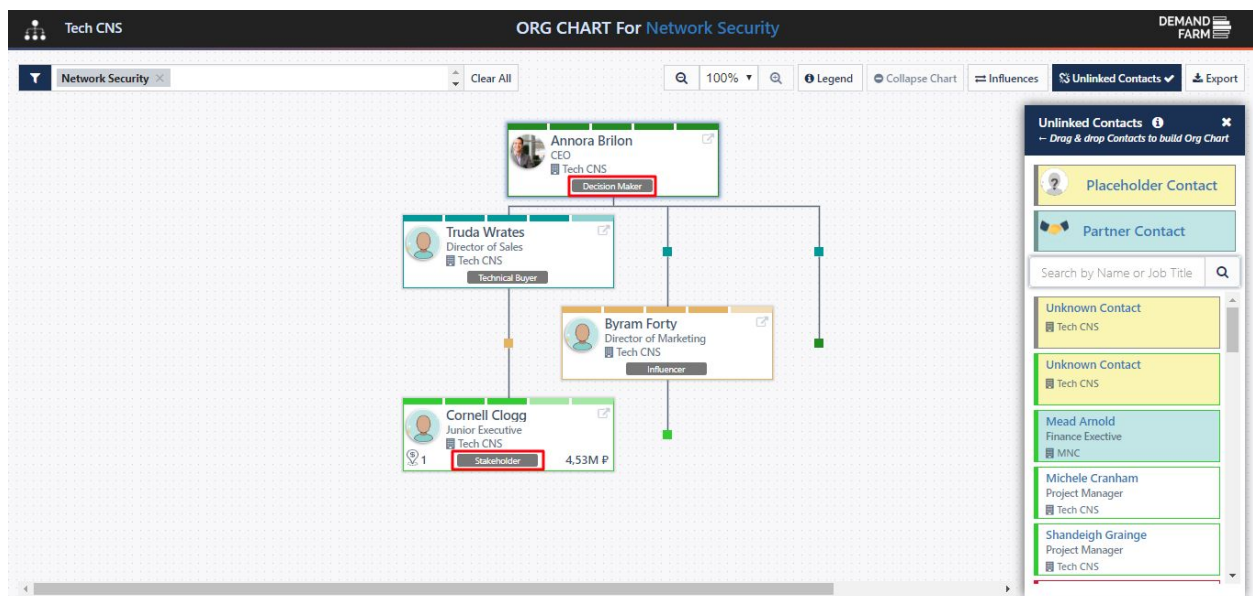
Opportunity Relationship Map

Ability to view Opportunity Stakeholder Contacts in Org Chart.

The screenshot shows the Dynamics 365 interface for an Opportunity named 'Network Security'. The top navigation bar includes 'Dynamics 365', 'Sales', 'Opportunities', and 'Network Security'. The 'ORG CHART' button is highlighted in the top left. The opportunity details show 'Est. Close Date: 16.02.2019', 'Est. Revenue: 4 534 354.00\$', 'Status: In Progress', and 'Owner: pradhanhar pradhanhar'. The sales process is shown with stages: Qualify (Active for 3 days), Develop, Propose, and Close. The 'Summary' pane on the left shows details for 'Network Security', including 'Contact: Cornell Clogg', 'Account: Tech CNS', 'Purchase Timeframe', and 'Currency: US Dollar'. The 'Relationship Assistant' pane shows a notification: 'Opportunity Closing Soon Network Security. Opportunity closes on 16 февраля 2019 г. OPEN OPPORTUNITY'. The 'Stakeholders' pane on the right is highlighted with a red box and lists the following contacts:

Name	Role
Annora Brilon	Decision M
Byram Forty	Influencer
Cornell Clogg	Stakeholder
Truda Wrates	Technical B

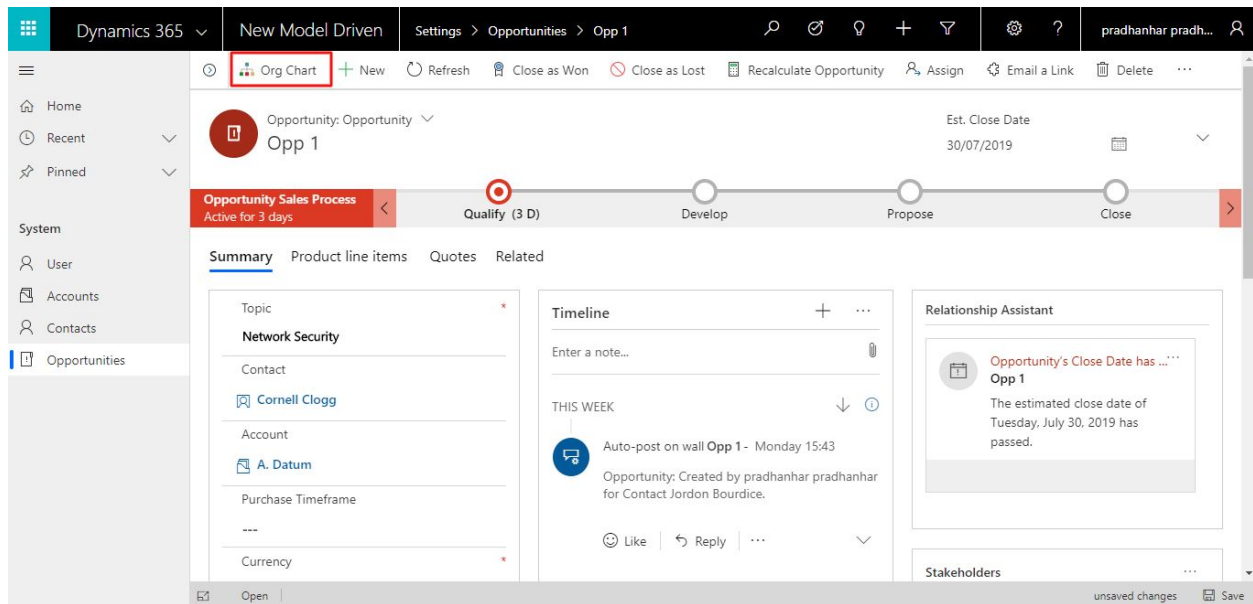
Org Chart opens from Opportunity 'Network Security'



Navigating to Org Chart in MS Dynamics-Unified Interface

To access the Org Chart app on Microsoft Dynamics, navigate to the 'Opportunity' tab on the Dynamics dashboard and select the opportunity you wish to view.

Click the 'Org Chart' button in the top left corner of the screen to access the application for this opportunity.



Org Chart Navigation

Org Chart License

The License Management module lets you manage licenses for Org Chart application.

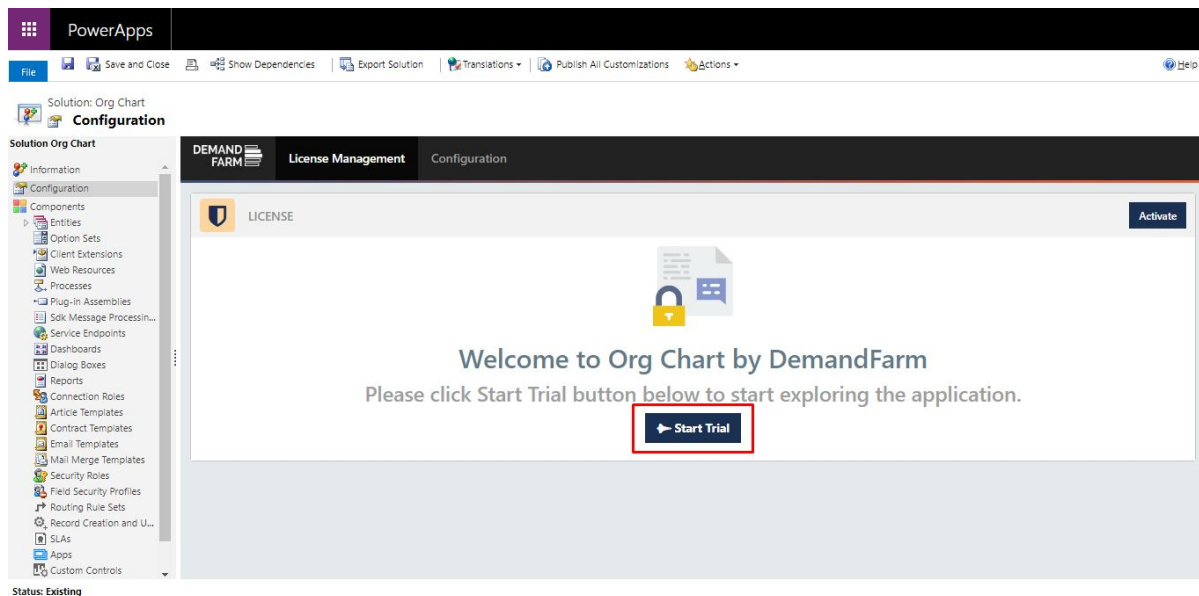
Licenses give you control over how many users in the organization can access org chart application and for how long. Licenses are unique to the organization. There are two types of licenses in Org Chart Application.

1. **Trial License:** Org Chart application has inbuilt Trial license for application evaluation. 'for a limited period' The trial Org Chart license without any restriction or constraint.
2. **User License:** Org Chart user license is based on a cloud license model per user per month.

Activate Trial Org Chart License

The Org Chart application has a trial license for evaluating an application without any restriction and constraints. A system administrator can activate the trial license by Clicking on “**Start Trial**” button.

Open **Settings-> Solutions-> Org chart-> Configuration**



Note: Post-trial period system administrator must submit a request for a user license.

How to request for Org Chart user license?

Organization system administrator will request for user license by giving the following information to us.

1. Organization Id
2. Number of user licenses
3. License duration

Share this information with us and we will issue license key for the same which will activate Org Chart application.

How to activate Org Chart user license?

Following steps to activate the Org Chart user license.

Click the **Request License** button. This will open Request License modal window.

The screenshot displays the PowerApps interface for the 'Solution: Org Chart'. The main content area shows the 'OC LICENSE User License Scheme' with the following details:

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

A 'Request License' button is highlighted with a red box. Below the license details, there is a 'USER LICENSE ASSIGNMENT' table with columns for FULL NAME, FIRST NAME, LAST NAME, TITLE, EMAIL, and ACTION. A circular timer indicates 'Your license is valid until Feb 1, 2019' and 'Expiring in 43 days'.

- 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.

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 [REDACTED]	Organization Name [REDACTED]
Organization Unique Name [REDACTED]	Requester Name [REDACTED]
Solution Name OrgChart	Solution Installed On [REDACTED]
Number Of Licenses* 15	Number Of Months* 3

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

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

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

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
Record Creation and U...

DEMAND FARM

OC LIC User Lic

License Type
ACTIVE

License Expires
Feb 1, 2019

Issuer
DemandFarm

USER L

FULL NAME

If you do not have a License file, click **Request License**. If you have any queries, please reach out to DemandFarm Sales at sales@demandfarm.com.

Choose License Key *

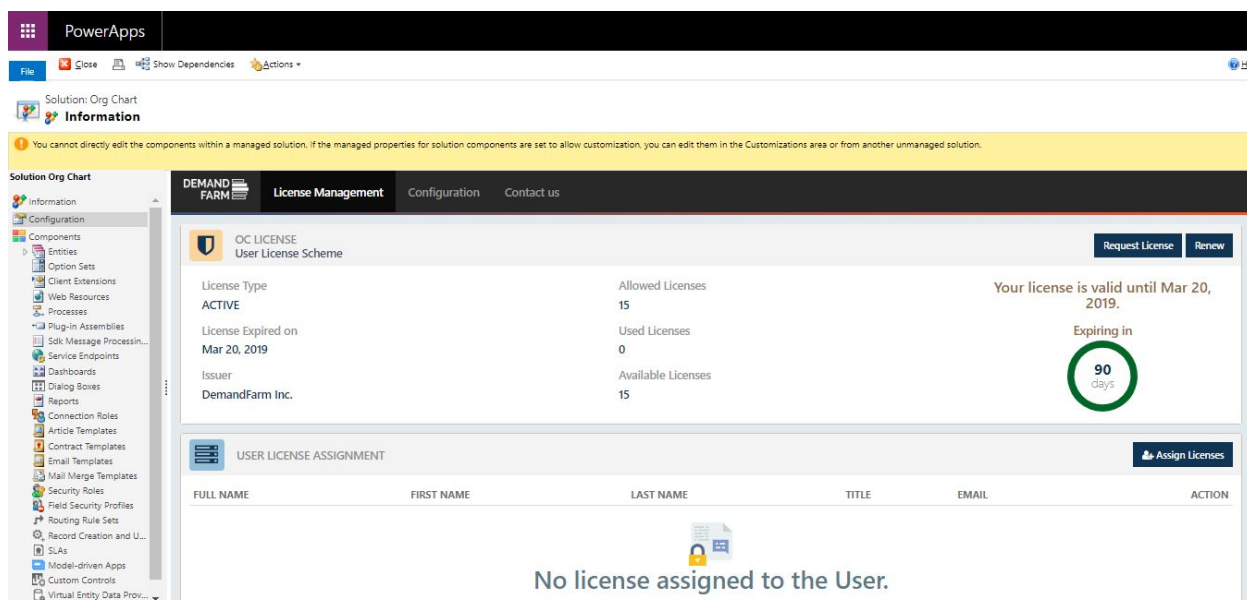
Choose File OrgChart_ACTIVE_UserLicense_15_1545296395757.crt **Validate**

License Details

License Type ACTIVE	Allowed Licenses 15	Your license is valid until Mar 20, 2019. Expiring in 90 days
License Expired on Mar 20, 2019	Used Licenses 0	
Issuer DemandFarm Inc.	Available Licenses 15	

Cancel **Apply License**

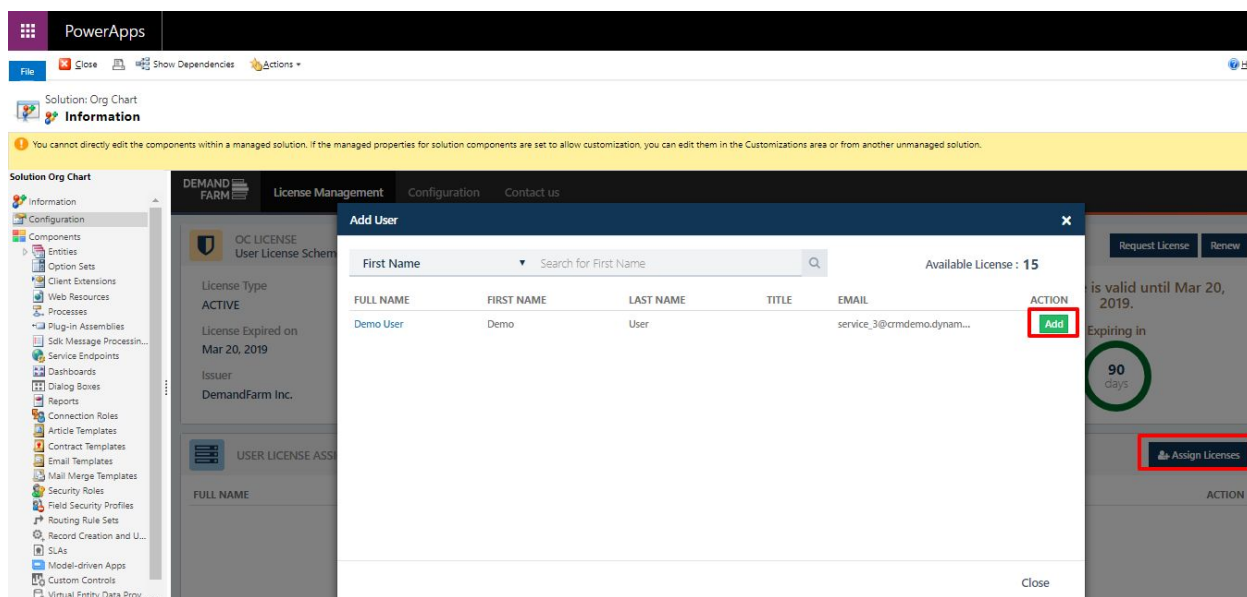
- Confirm the license details by clicking **Apply License**. The Full License key is now setup.



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.

PowerApps

File Close Show Dependencies Actions

Solution: Org Chart
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Solution Org Chart

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Reports
Connection Roles
Article Templates
Contract Templates
Email Templates
Mail Merge Templates
Security Roles
Field Security Profiles
Routing Rule Sets
Record Creation and U...
SLAs
Model-driven Apps
Custom Controls
Virtual Entity Data Prov...

DEMAND FARM License Management Configuration Contact us

OC LICENSE
User License Scheme

Request License Renew

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