Installation Guide

Account Planner by DemandFarm for MS Dynamics CRM

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Introduction

The Account Planner application by DemandFarm is an interactive, visual representation of everything you need to know to make strategic decisions – it's the maximum info about Key Accounts in terms of landscape & business opportunities. A visual, single screen app lets you -

- Grow your Accounts by creating a landscape & identifying Buying Centers within the Account and map them with the right products/solutions.
- View your active opportunities, businesses and dead-end areas at a glance
- Identify focus areas by marking your whitespaces
- Build account strategy, set and track revenue goals

Account Planner 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.

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

Installation Process

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

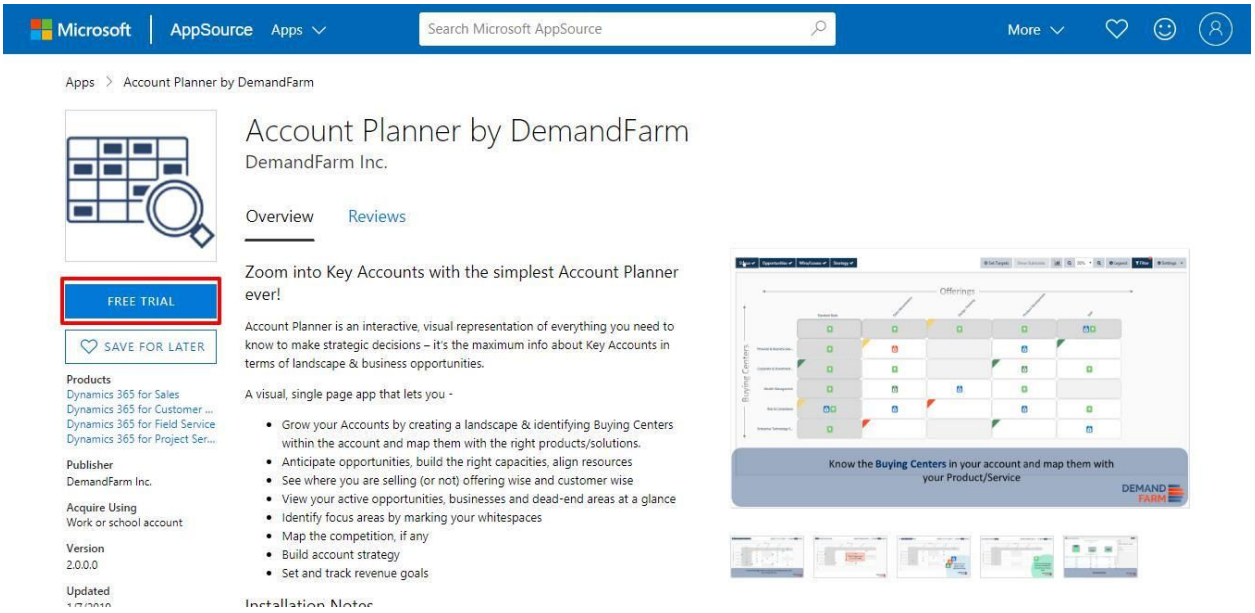
If you face any issues installing Account Planner by DemandFarm or would like technical assistance, please do not hesitate to reach out to us on email at support@demandfarm.com.

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 Account Planner page on AppSource at https://appsource.microsoft.com/en-us/product/dynamics-365/demandfarm.account-planner.
2. Click on the Free Trial button on the top-left corner of the page.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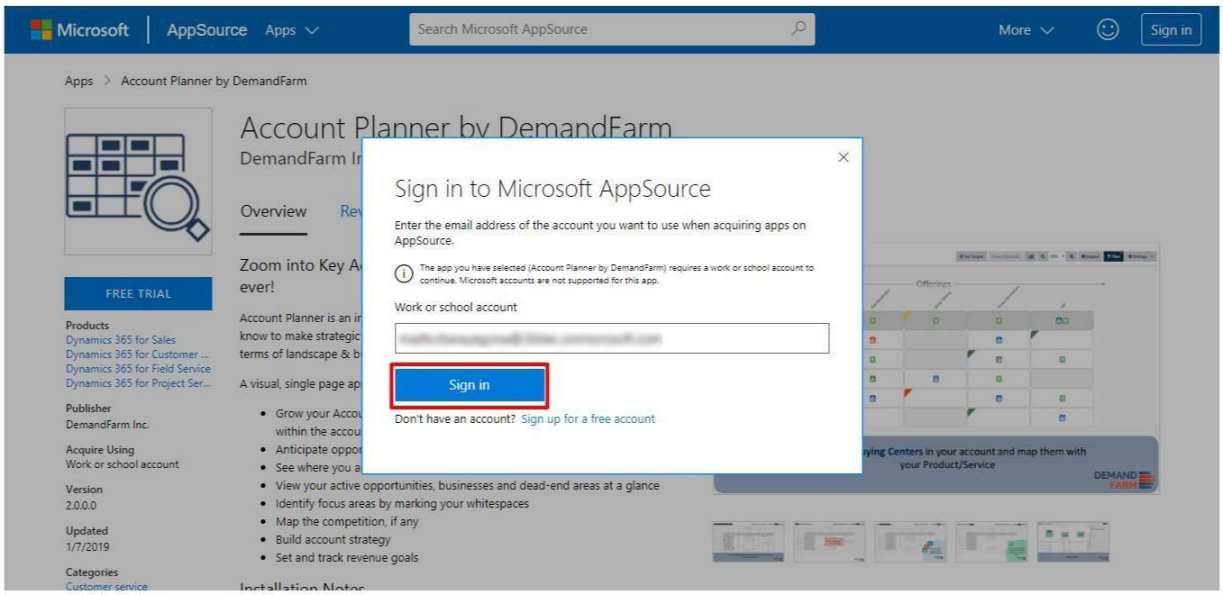
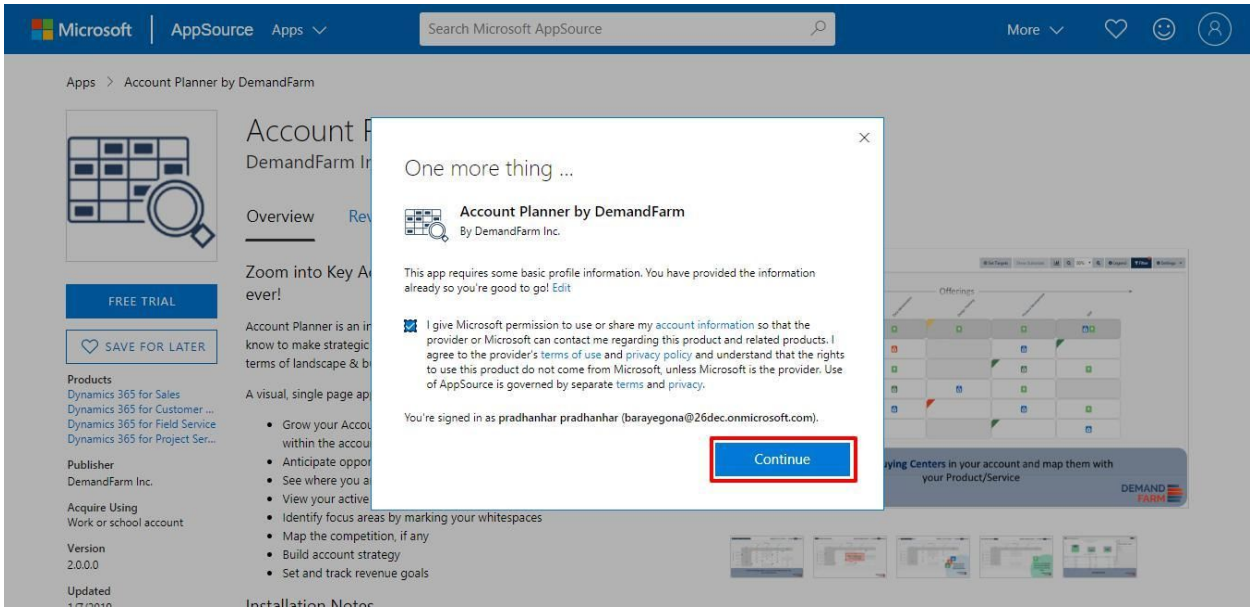
Products
Dynamics 365 for Sales
Dynamics 365 for Customer ...
Dynamics 365 for Field Service
Dynamics 365 for Project Ser...
Publisher
DemandFarm Inc.
Acquire Using
Work or school account
Version
2.0.0.0
Updated
Zoom into Key Accounts with the simplest Account Planner ever!
Account Planner is an interactive, visual representation of everything you need to know to make strategic decisions – it's the maximum info about Key Accounts in terms of landscape & business opportunities.
A visual, single page app that lets you -
Grow your Accounts by creating a landscape & identifying Buying Centers within the account and map them with the right products/solutions.
Anticipate opportunities, build the right capacities, align resources
See where you are selling (or not) offering wise and customer wise
View your active opportunities, businesses and dead-end areas at a glance
Identify focus areas by marking your whitespaces
Map the competition, if any
Build account strategy
Set and track revenue goals
Offerings
Buying Centers
Know the Buying Centers in your account and map them with your Product/Service
DEMAND FARM

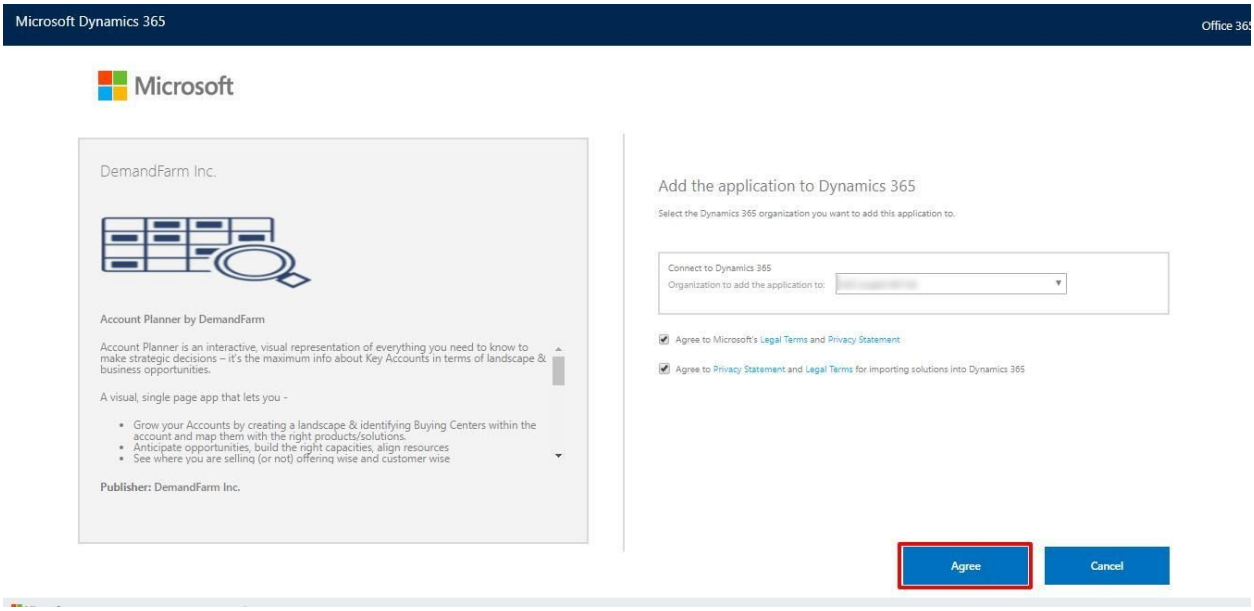
3. If you're not already logged in to Microsoft AppSource, you'll be prompted to login. Please login with your Global Administrator credentials to proceed.



4. Post login confirmation, you will see a modal window prompting to accept terms to begin the installation of Account Planner application. Click Continue.



5. The final confirmation screen lists the Account Planner 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.



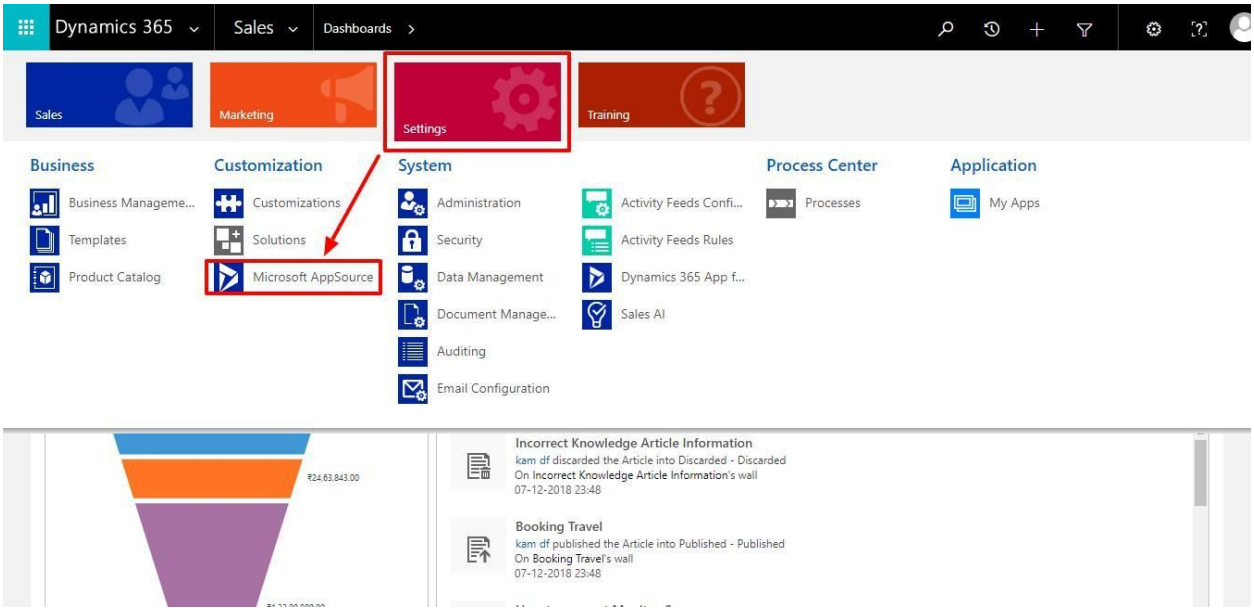
6. The installation process will now commence. You will see the status of the installation in the Administration Center screen. Please wait till the process is completed. Once the installation is successfully completed, the Account Planner application will appear as Installed in the Administration Center under *Manage your solutions*.

Installation for System Administrators / System Customizer

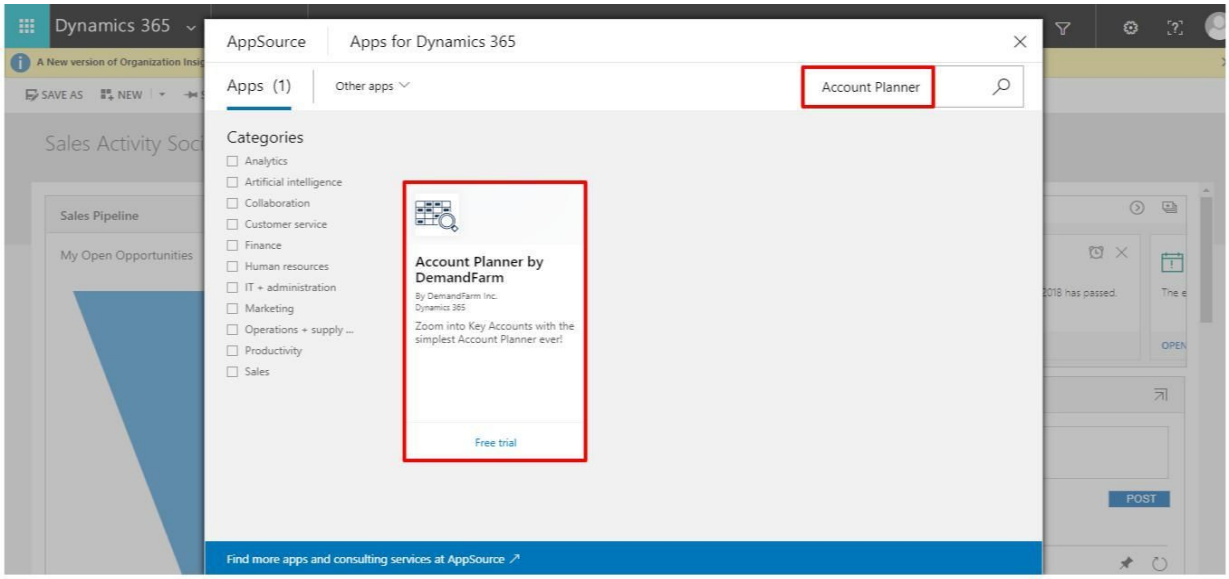
If you're a System Administrator or System Customizer, you **must** install the application from within MS Dynamics itself. Please note that Installing directly from AppSource may not work for your access level; this is a known issue with Microsoft.

1. Login into MS Dynamics as System Administrator or System Customizer.

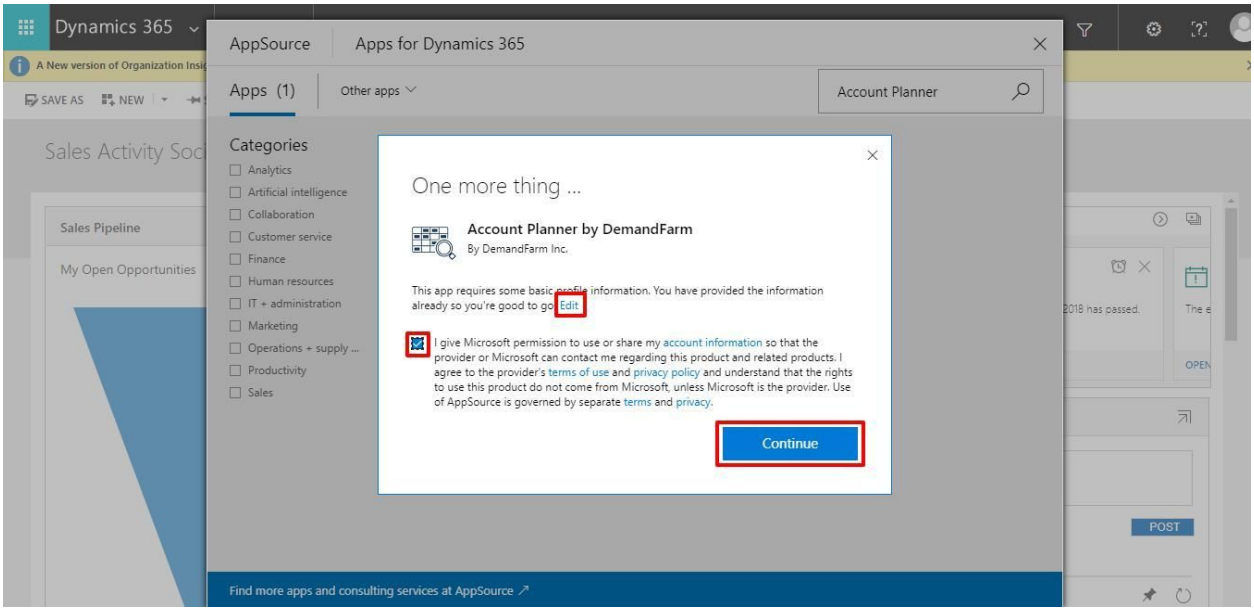
2. Navigate to *Settings* > *Customization*. Click Microsoft AppSource.



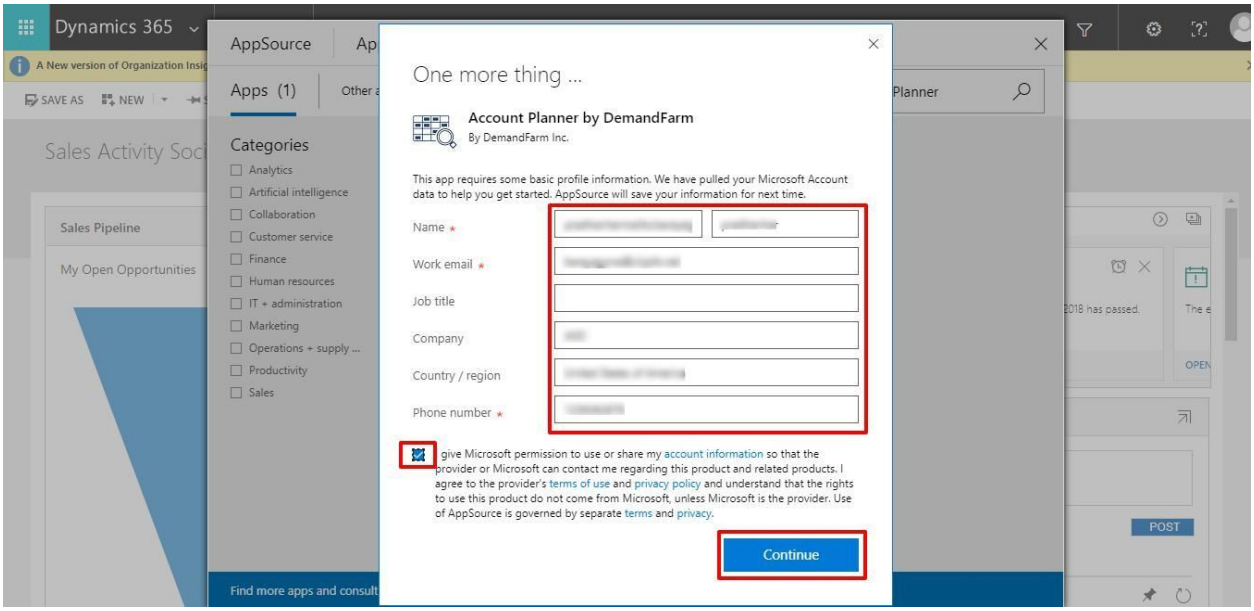
3. An AppSource modal window appears. Search for “Account Planner by DemandFarm”. The Account Planner listing will appear as shown below. Click Free Trial to commence installation.



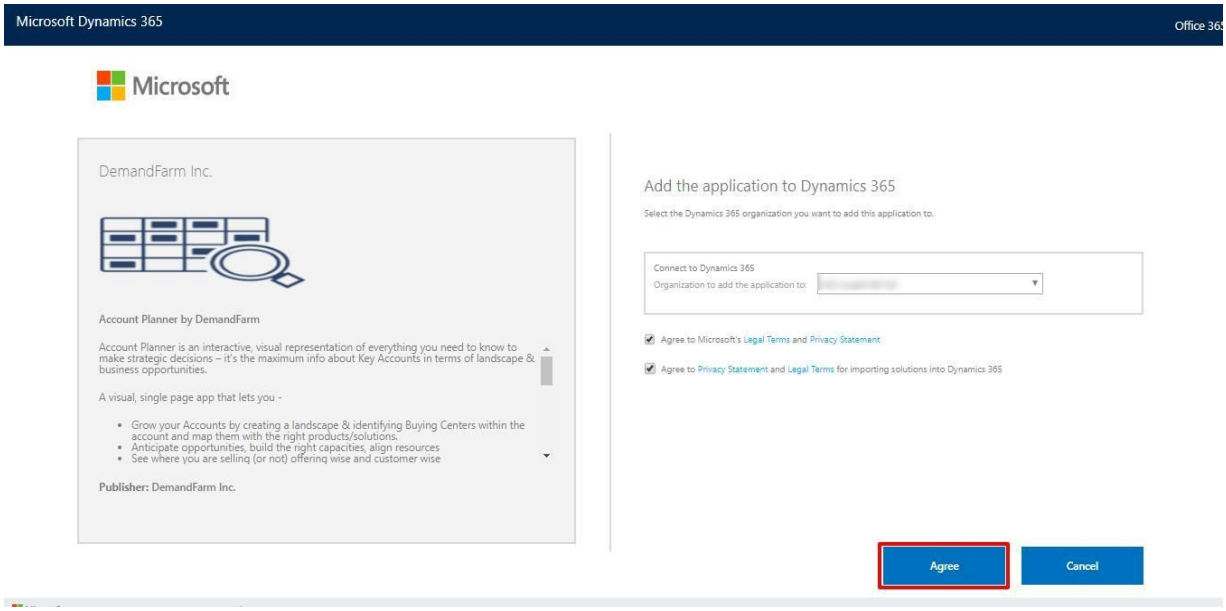
4. The installation process starts. On the modal window, ensure that your basic profile information reflects properly. To check this, click Edit. This will show all your profile details. If you see blanks in all the form fields, stop the installation process and restart from Step 1. This is a known Microsoft 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.



6. The final confirmation screen lists the Account Planner 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 Account Planner application will appear as Installed on the Manage your solutions page. The Account Planner application will also appear under *Settings > Solutions > All Solutions*.

Contact Us

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