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# Post Installation Guide

Account Planner by DemandFarm for MS Dynamics CRM

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## Introduction

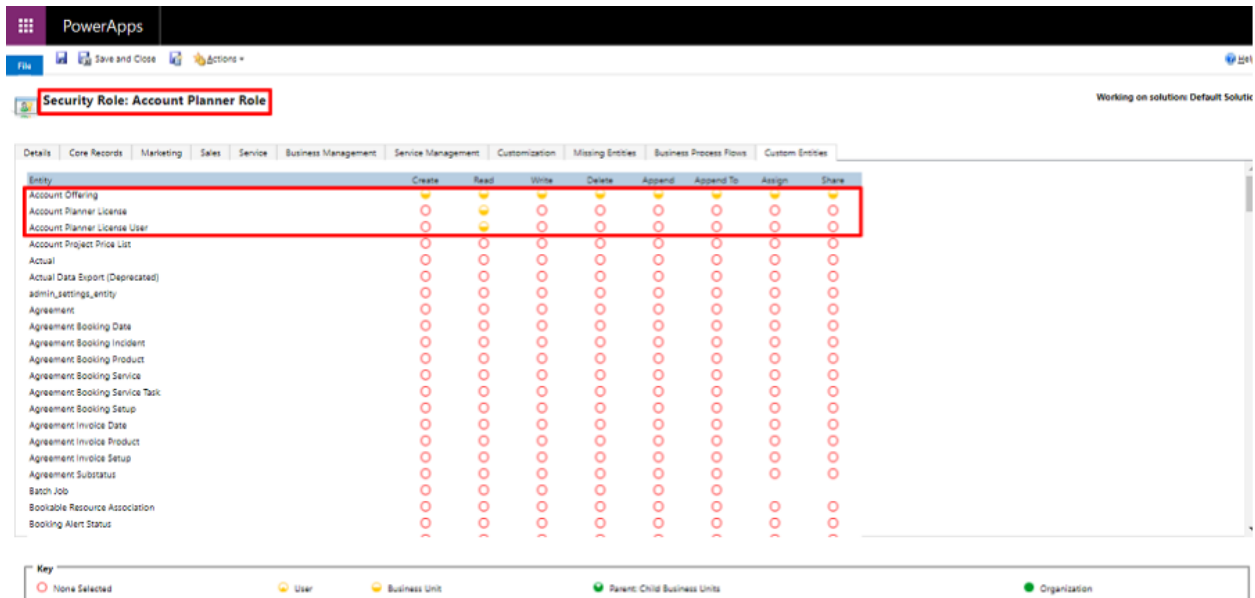
Congratulations on installing the Account Planner by DemandFarm application! You're now just a few steps away from being able to use the application and build awesome Account Plan for your strategic Accounts. Should you face any issues or require any further assistance, please do not hesitate to contact us at [support@demandfarm.freshdesk.com](mailto:support@demandfarm.freshdesk.com).

### Step 1: Assign Security Roles to Account Planner Users

For a user to be able to use all functionalities of Account Planner, including updating Relationship Status, Goal they require the following permissions -

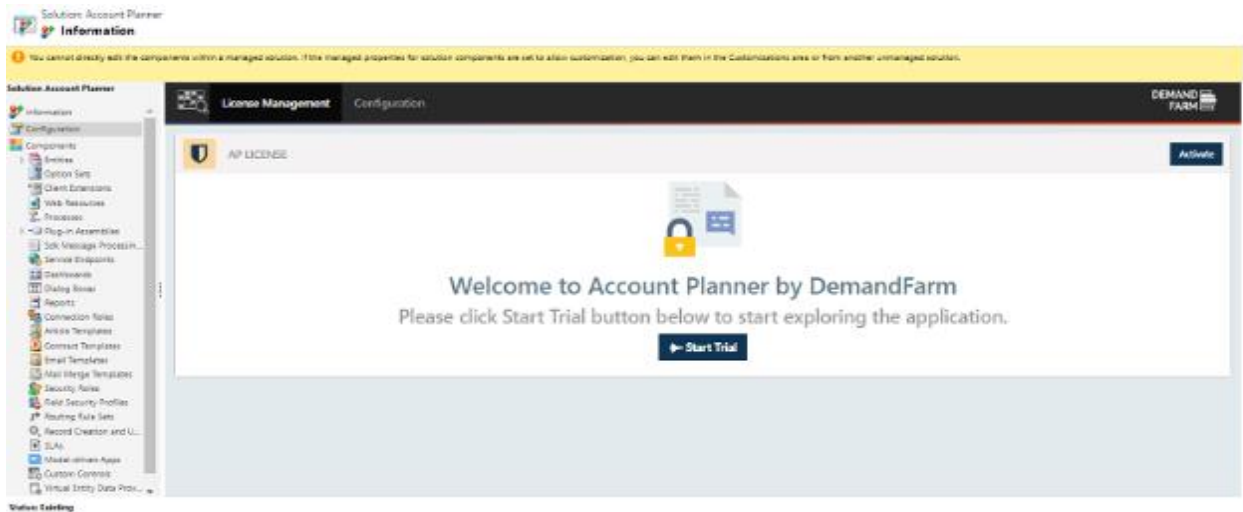
1. **Read/Write** permission on **Offering** custom entity.
2. **Read/Write** permission on **Buying Center** custom entity.
3. **Read/Write** permission on **Account Offering** custom entity.
4. **Read/Write** permission on **Opportunity Extension** custom entity.
5. **Read/Write** permission on **Whitespace Status** custom entity.
6. **Read/Write** permission on **Whitespace Strategy** custom entity.
7. **Read/Write** permission on **Whitespace config** custom entity.
8. **Read/Write** permission on **Grandstand Filter** custom entity.
9. **Read** permission on **Account Planner License** custom entity.
10. **Read** permission on **Account Planner License User** custom entity.
11. **Read** permission on **Solution** standard entity.

To be able to only view the Account Planner in a read-only state, the user requires Read permissions on 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 Account Planner application. By default, the Account Planner application is packaged with a Security Role named **Account Planner Role** that grants users full access to Account Planner functionality. This can be used for quick setup of Account Planner user permissions.

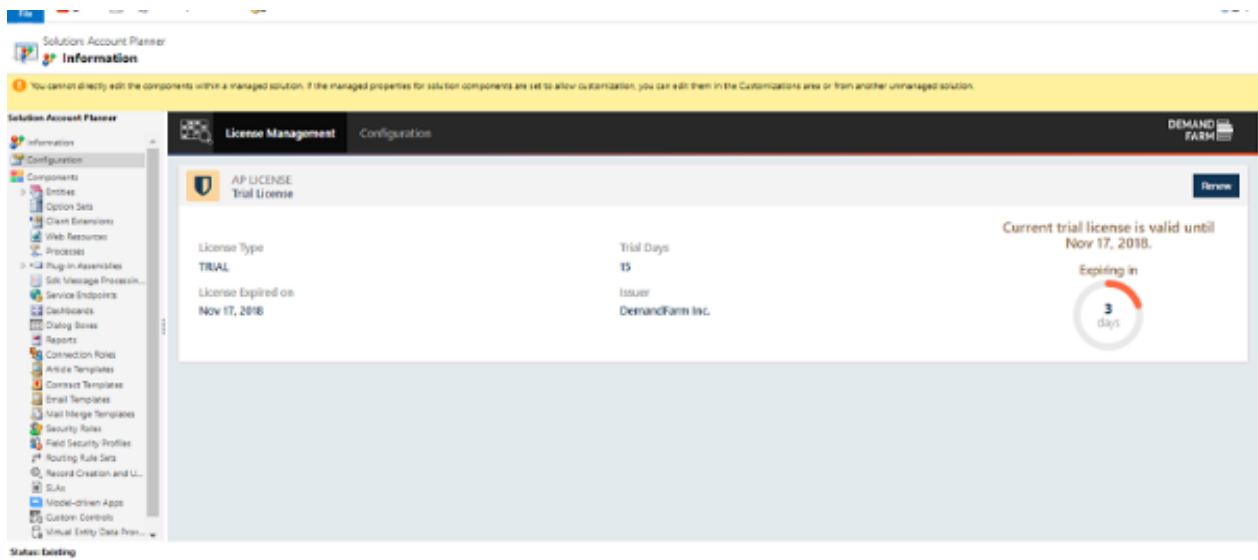


## Step 2: Activate Trial License

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 Account Planner installation in your instance. You can activate this trial license through the Solution Configuration page at **Settings** → **Solutions** → **Account Planner**. See screenshot below.



Click on the **Start Trial** button to activate your trial, by default 30 days free trial. The Account Planner 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 3: Activate Full License & User Management

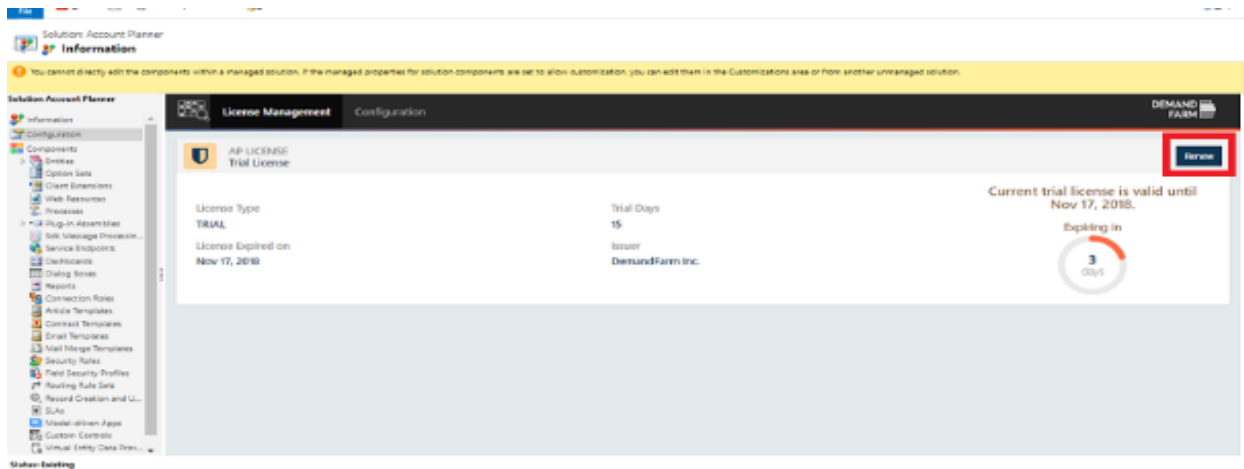
Post completion of the trial, access to Account Planner will be restricted until a Full License key is setup on your instance. To procure a Full License key, please contact DemandFarm Sales at [sales@demandfarm.com](mailto:sales@demandfarm.com) or +1 (415) 735-3143. Please note that the Account Planner 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 Account Planner

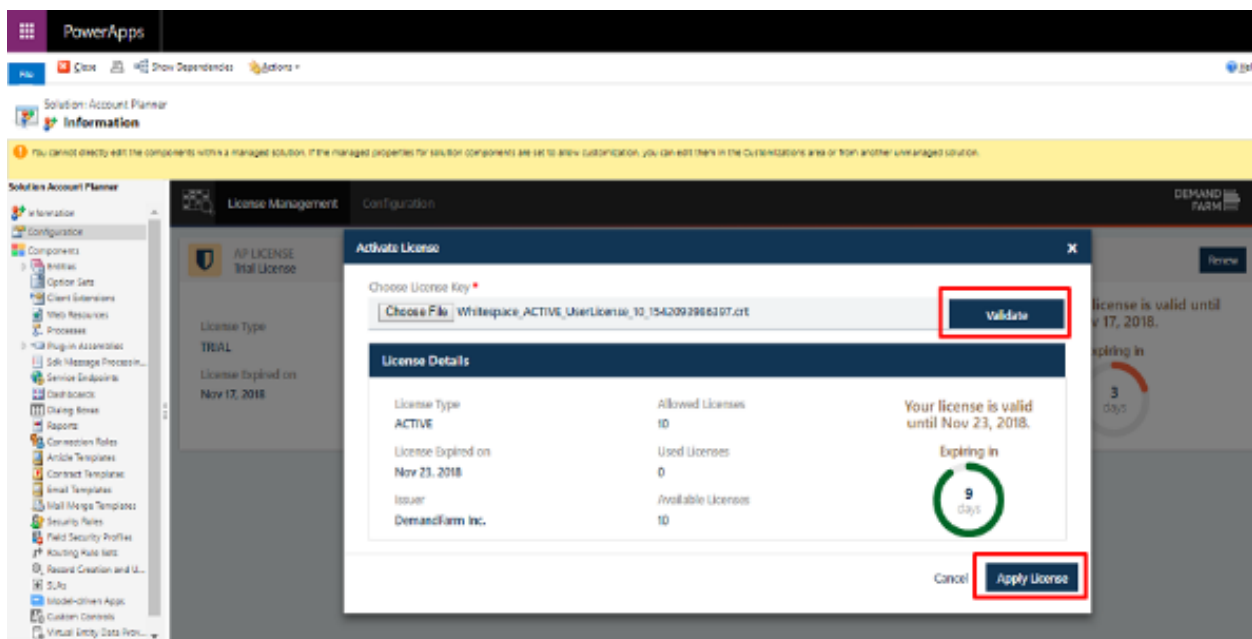
This process must be completed by the MS Dynamics Administrator. Once the Full License key has been procured, please save it a known location and follow the process listed below.

#### Process

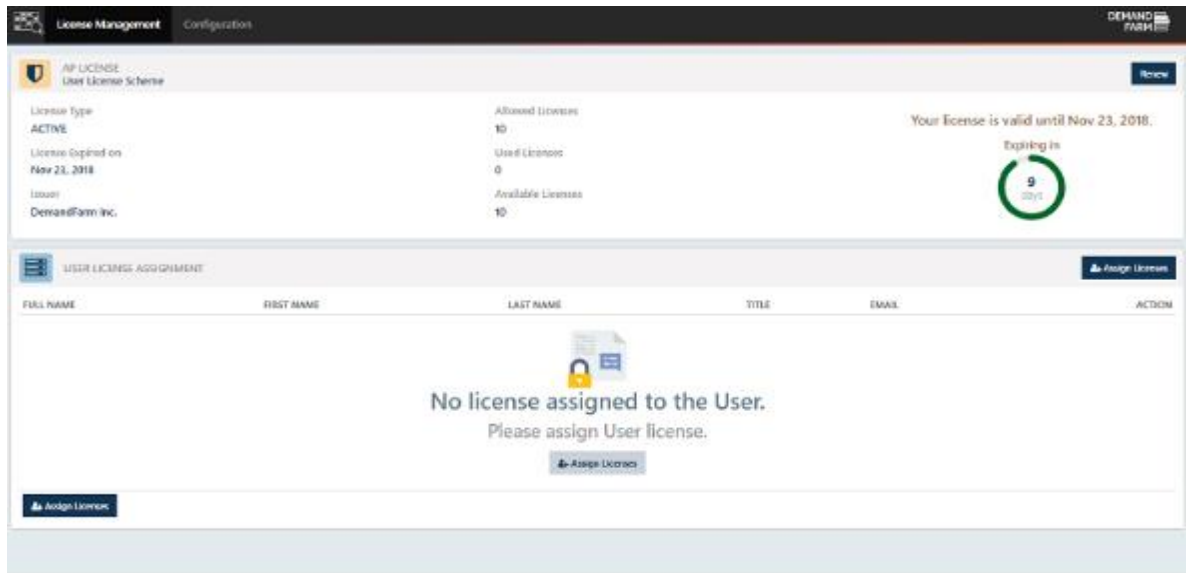
1. Go to the Account Planner configuration page through **Settings** → **Solutions** → **Account Planner** → **Configuration**.
2. Click the **Renew** button. This will open Activate License modal window.



3. Click **Choose File**. Select the Full License key file from the location where it was saved. Click **Validate**. The license details will be shown as below screenshot.

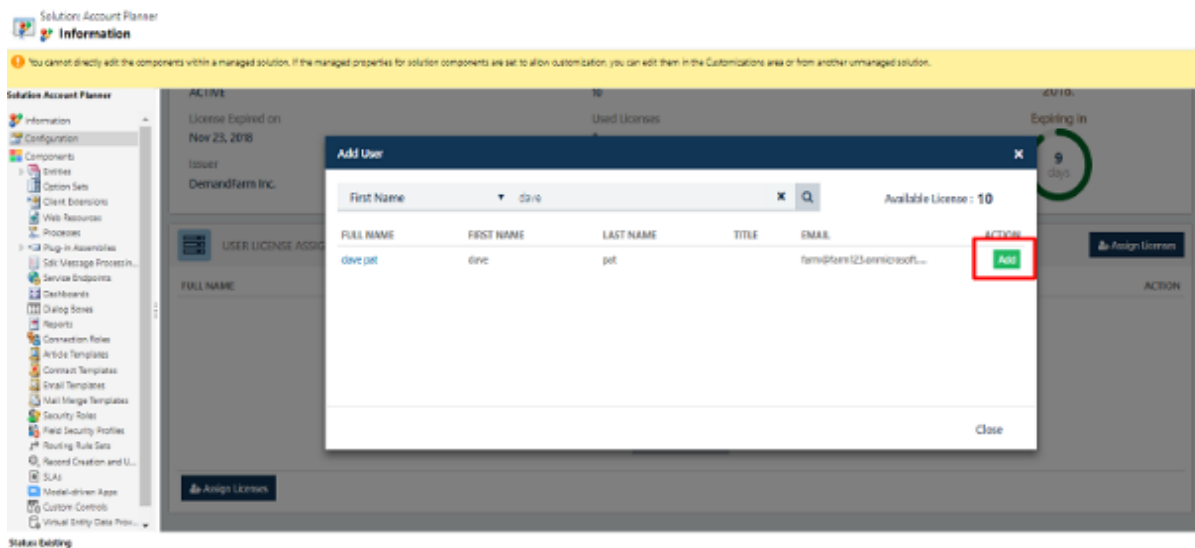


4. Confirm the license details by clicking **Apply License**. The Full License key is now setup.



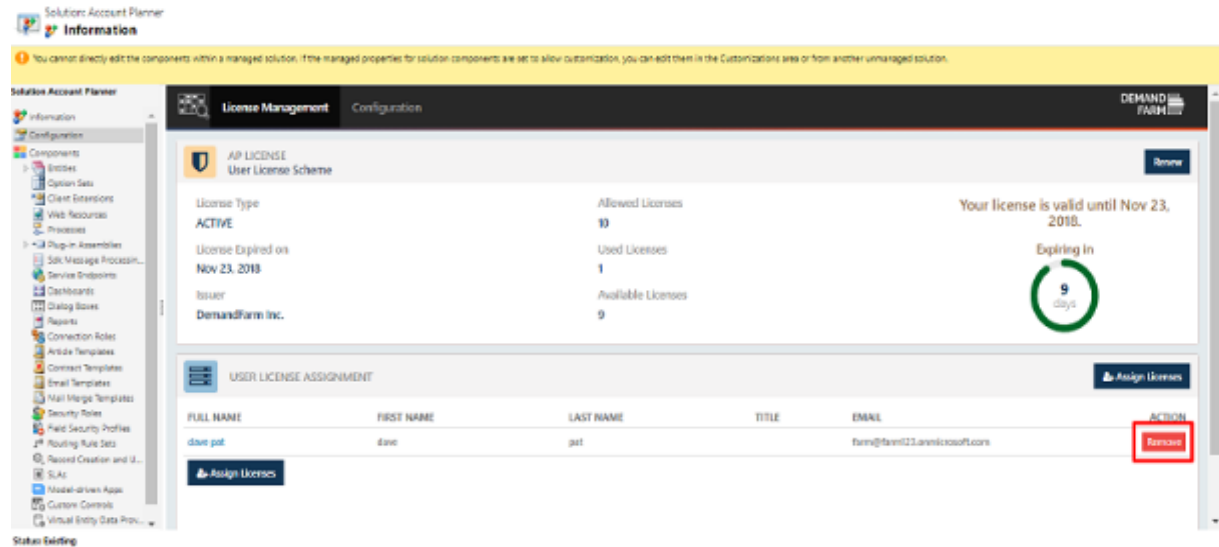
### Assigning Licenses to Users

This process must be completed by the MS Dynamics Administrator. Go to the Account Planner configuration page through **Settings → Solutions → Account Planner → 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 a license to them.



## Revoking Licenses

This process must be completed by the MS Dynamics Administrator. Go to the Account Planner configuration page through **Settings → Solutions → Account Planner → 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.

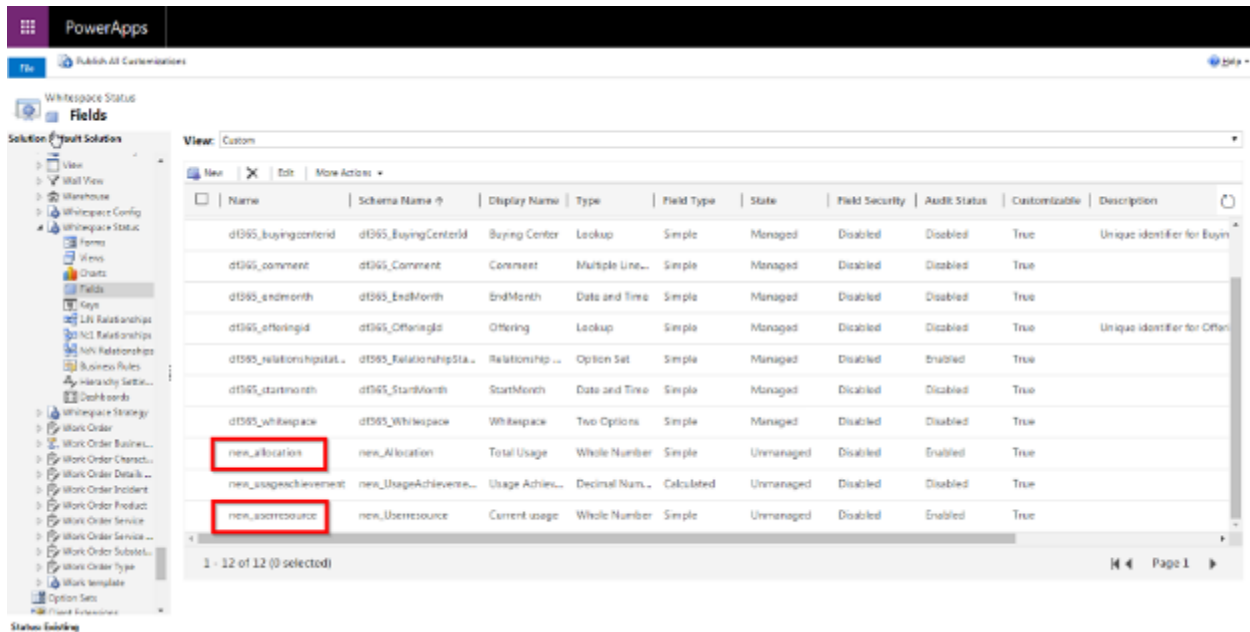


### Step 4: Add Custom Fields to Account Planner Status form

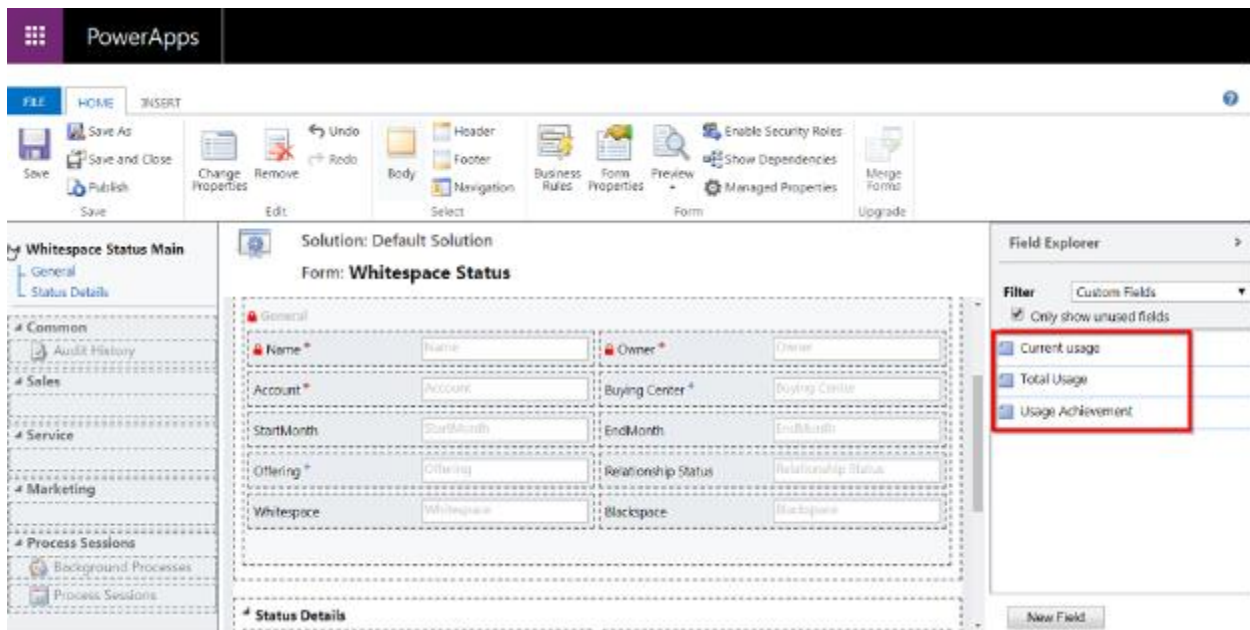
Account Planner status custom field can be added into form and user can populate those field value from planner user interface. The system administrator must add these custom fields in Whitespace Status form so that user can add/modify the field. Currently Account Planner support following field types:

1. String
2. Boolean
3. Text
4. Picklist
5. Number input
6. Whole number (Integer)
7. Floating point number
8. Decimal number

Below screenshot highlight the created custom fields.



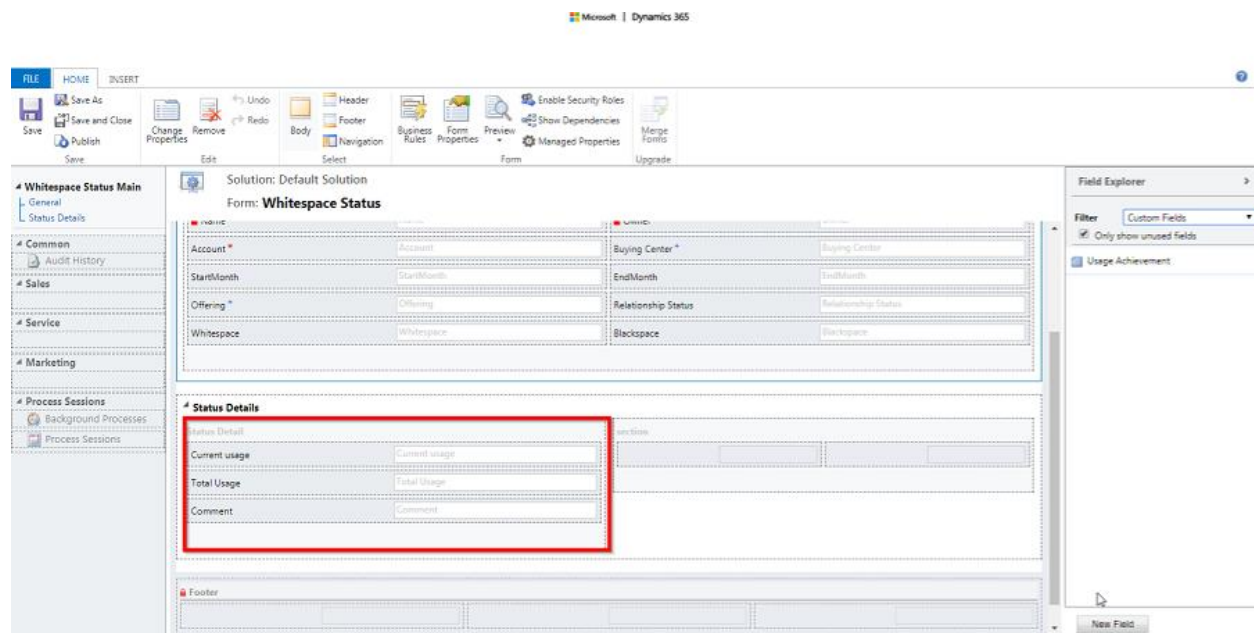
Custom field must be included in Whitespace Status form. Go to **Setting -> Customize the system -> Entities -> Whitespace Status -> Forms -> Whitespace Status main**



**Process**

1. Open Whitespace Status main form: Drag and Drop fields in Status Details section. 2. Save and Publish All Customizations.



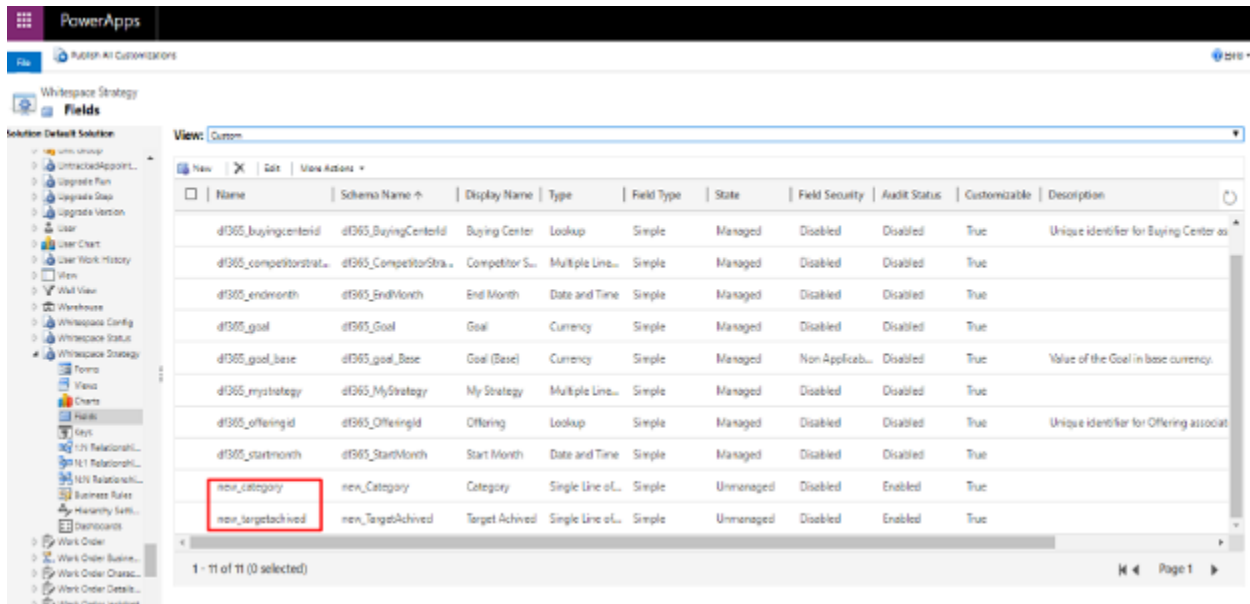


## Add Custom Fields to Account Planner Strategy Form

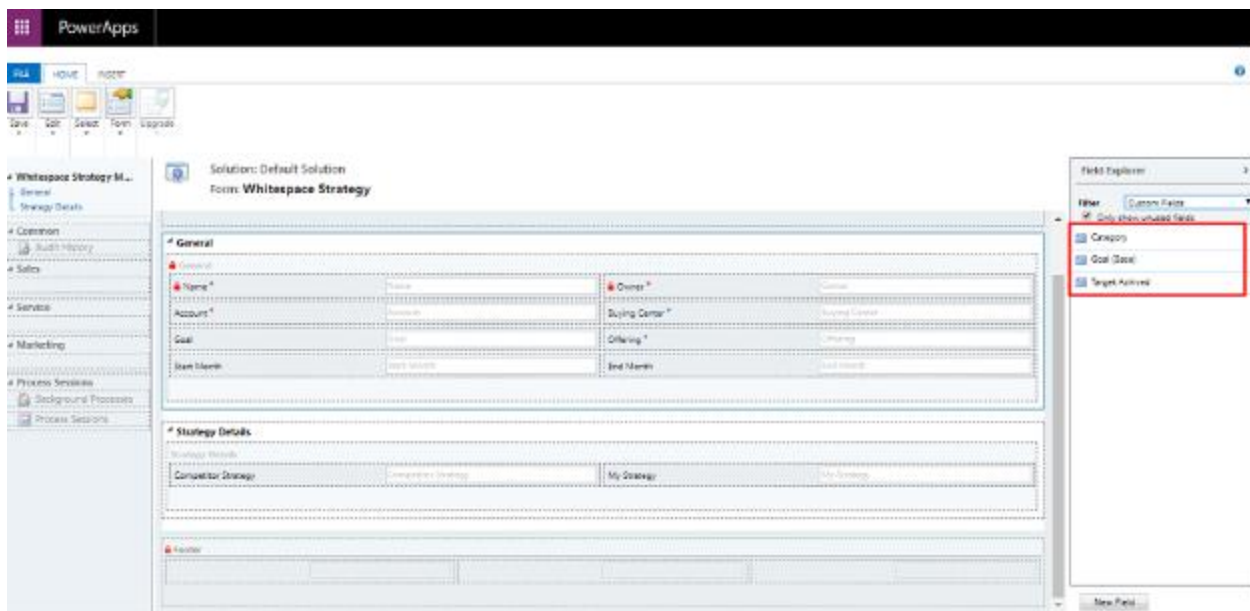
Account Planner strategy custom field can be added into form and user can populate those field value from planner user interface. The system administrator must add these custom fields in Whitespace Strategy form so that user can add/modify the field. Currently Account Planner support following field types:

1. String
2. Boolean
3. Text
4. Picklist
5. Number input
6. Whole number (Integer)
7. Floating point number
8. Decimal number

Below screenshot highlight the created custom fields.

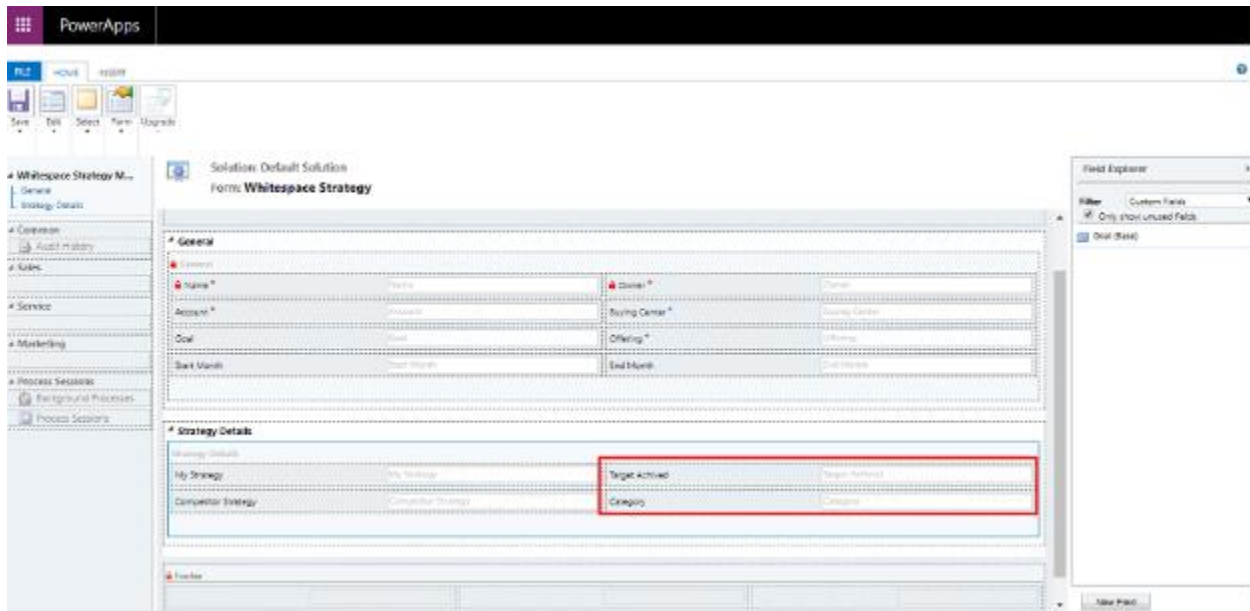


Custom field must be included in Whitespace Status form. Go to **Setting -> Customize the system -> Entities -> Whitespace Strategy -> Forms -> Whitespace Strategy main**



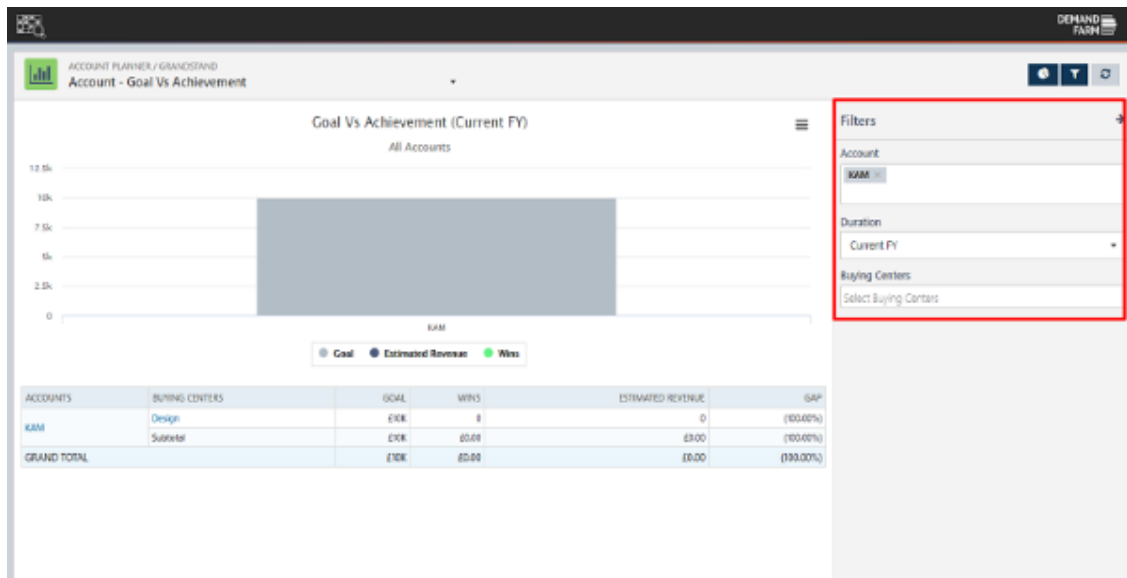
**Process**

1. Open Whitespace Strategy main form: Drag and Drop fields in Status Details section. 2. Save and Publish All Customizations.



### Step 5: Add Custom Filter in Grandstand

Account planner provides three default filters in the grandstand report highlighted in below screenshot.



Additional filters can be configured by adding **“Dashboard Filter”** on **Opportunity, Account, Buying Center and Offering** entities. Currently Account Planner supports following types of Grandstand filters.

1. String

2. Boolean
3. Date
4. Picklist
5. Currency

The user can add additional filter by opening **Settings -> Configuration -> Grandstand Filters** page. Choose Entity, Fields and the order of the filter and save the form as highlighted in below screenshot.



Now additional filters will be shown in Grandstand page as below screenshot.

