

**Map My
Relationships**

**Mind Map
Visualization of
Dynamics 365 CRM
Records**



Key Features

360 degrees view

Get 360 degrees view of all important data of the record in a single view.

Easy Navigation

Navigate easily and quickly to any of the records in the relationship.

Relationships

Support for 1:N, N:1 as well as N:N information.

View important details

Begin with a quick summary with the ability to drill down to the details.

Perform quick Actions

Ability to quickly record any activity like phone call or appointment for the related records.

Entity Support

Support both OOB and Custom entities.

Grouping & Aggregation

Support for viewing aggregate values without the need for creating rollup fields.

Key Features

Configuration

Control can be configured for Unified, Mobile and Tablet experience.

Map My Connections

Configure connection control to create, update, view and delete the connection records.

Child Configuration

Set up child configuration and drill N-level further down through the relationships of an entity.

Create Associate Record

Ability to create a new entity record through the entity node in the relationship view in just one click

Connect Records

Ability to connect records from within the connection relationship view

Color Legends

Ability to indicate the respective connection roles that the records are connected through

Available For

SUPPORTED VERSIONS

- MICROSOFT DYNAMICS 365 v9.1 and above
- Dataverse (Power Apps)

DEPLOYMENTS

- DYNAMICS 365 ONLINE

Basic Control Configuration

Field Properties

Modify this field's properties.

Display Formatting Details Events Business Rules Controls

Control	Web	Phone	Tablet	
Text Box (default)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Map My Relationships Control	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	X

[Add Control...](#)

Map My Relationships Control

Property	Value	
Field *	new_mmr	
Map My Relationship Control ...		
One to Many Relationships	contact_customer_accounts (SingleLine...	
Many to One Relationships		
Many to Many Relationships		

One to Many Relationships
Compatible types: SingleLine.Text, SingleLine.TextArea, Multiple
Comma seperated list of one to many relationship schema name

Hide Default Control

OK Cancel

Advanced Configuration

Dynamics 365 | Map My Relationships

☰ Show Chart + New 🗑️ Delete | ↕ Refresh 📧 Email a Link | ⌵ Flow ⌵ 📊 Run Report ⌵

Active Entity Configurations ⌵

<input checked="" type="checkbox"/> Name ↑ ⌵	Entity ⌵
Account Child Connection	account
Account Trial	account
Account with associated contacts	account
Approach with Attempts	new_approach
Attempt with Verdict	new_attempt
Contact Connections	contact

Settings

- Entity Configurations
- License Registration

Entity Configuration

The screenshot displays the Dynamics 365 'Map My Relationships' interface for configuring the 'Opportunity' entity. The left sidebar shows navigation options: Home, Recent, Pinned, Settings, Entity Configurations (selected), and License Registration. The top navigation bar includes actions like Save, Save & Close, New, Deactivate, Delete, Refresh, Export to PDF, Assign, Share, Email a Link, and Flow.

Opportunity Entity Configuration

- Name:** * Opportunity
- Entity:** * Opportunity (Opportunity)
- Set As Default:** No
- Entity Node Setting:**
 - Entity Node Image:** Entity Image
 - Allowed Actions:** x Appointment (Appointment)

Entity Relationships

Relationship Type	Name	Entity Configuration
Many-to-many	new_new_classification_oppo	Opportunity
Many-to-one	new_new_electronic_oppo	Opportunity
Many-to-many	new_new_sport_opportunity..	Opportunity
One-to-many	new_opportunity_new_appro	Opportunity

1 - 4 of 12 (0 selected)

Relationships & Additional Configurations

New Entity Relationship

General

Relationship Type *	One-to-many	Entity Configuration *	 Account - Pre Sales Process
Relationship *	opportunity_customer_accounts(opportunity) x ▾	Child Configuration	---

Node Settings		Cluster Settings	
Relationship Node Image	Entity Image	Group By	Status (statecode) x ▾
Allowed Actions	x Appointment (Appointment) x ▴ ▾	Measure	Est. Revenue (estimatedvalue) x ▾
View to show fields on Tooltip	Opportunities Being Followed x ▾	Aggregate Type *	SUM

Map My Connections Control

Set Properties

Set the List or Chart properties.

Display Formatting Controls

Control	Web	Phone	Tablet
Read-only Grid (default)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Map My Connections	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>

Add Control...

Map My Connections

Dataset_Display_Key	Active Connections	
Allowed Role Categori...	Sales Team,Business,Family (...)	
Allowed Entities	account (Multiple)	
Default Control	0 (SingleLine.Text)	
Map My Relationship ...	Opportunity (SingleLine.Text)	
Allow to connect usin...	0 (SingleLine.Text)	

Dataset_Display_Key

OK Cancel

4G Enabled Tablets

Opportunity · Opportunity

3/6/2017 Est. Close Date | \$3,257,500.00 Est. Revenue | In Progress Status

Opportunity Sales Process Active for 17 days

Qualify Develop Propose (17 D)

Summary Products My Connections Connection Test Subjections Relationship View Latest Topics Topics Simple ...

Connected To	Role (To)	Description	Connection Name
A Datum Corporation	Sales Professional	ppp	A Datum Corporation
Adventure Works	MMC	AD Work	Adventure Works
Alex Simmons	Sales Professional		Alex Simmons
Allison Brown	Sales Professional		Allison Brown

360 degrees view of data

AW Adventure Works (sample)
Account · Account ▾

\$60,000.00 Annual Revenue | 4,300 Number of Employees | **Sam G** Owner ▾

Summary Map My Relationships Project Price Lists Details Field Service Files Scheduling Related

Marketing Mail

Appointments(0)

Notes(1)

Leads(20)

Opportunities(6)

Status - Won(1)

Some interest in our JJ line of products (sample)

Status - Open(5)

Life Obreain

Connections(2)

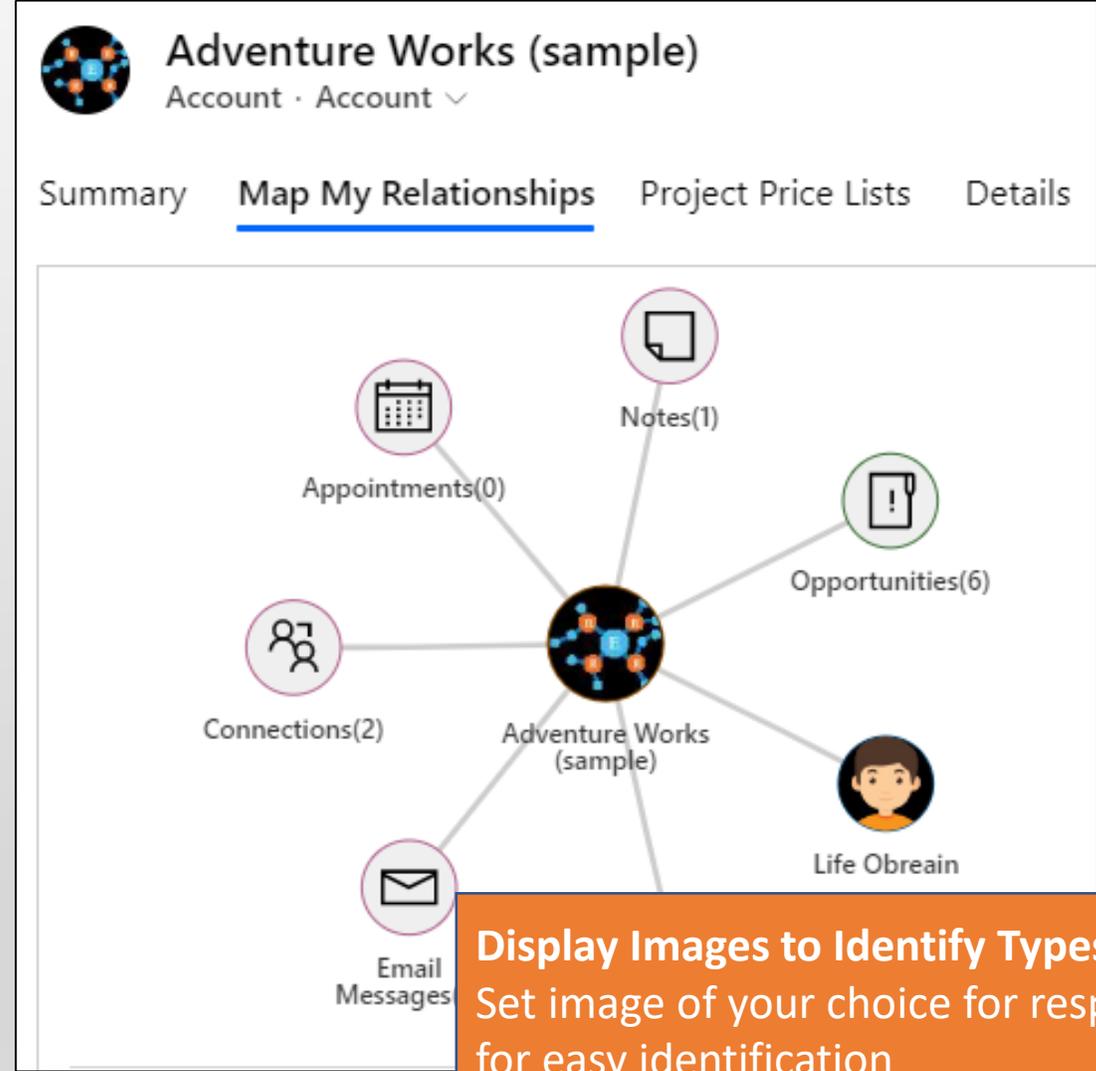
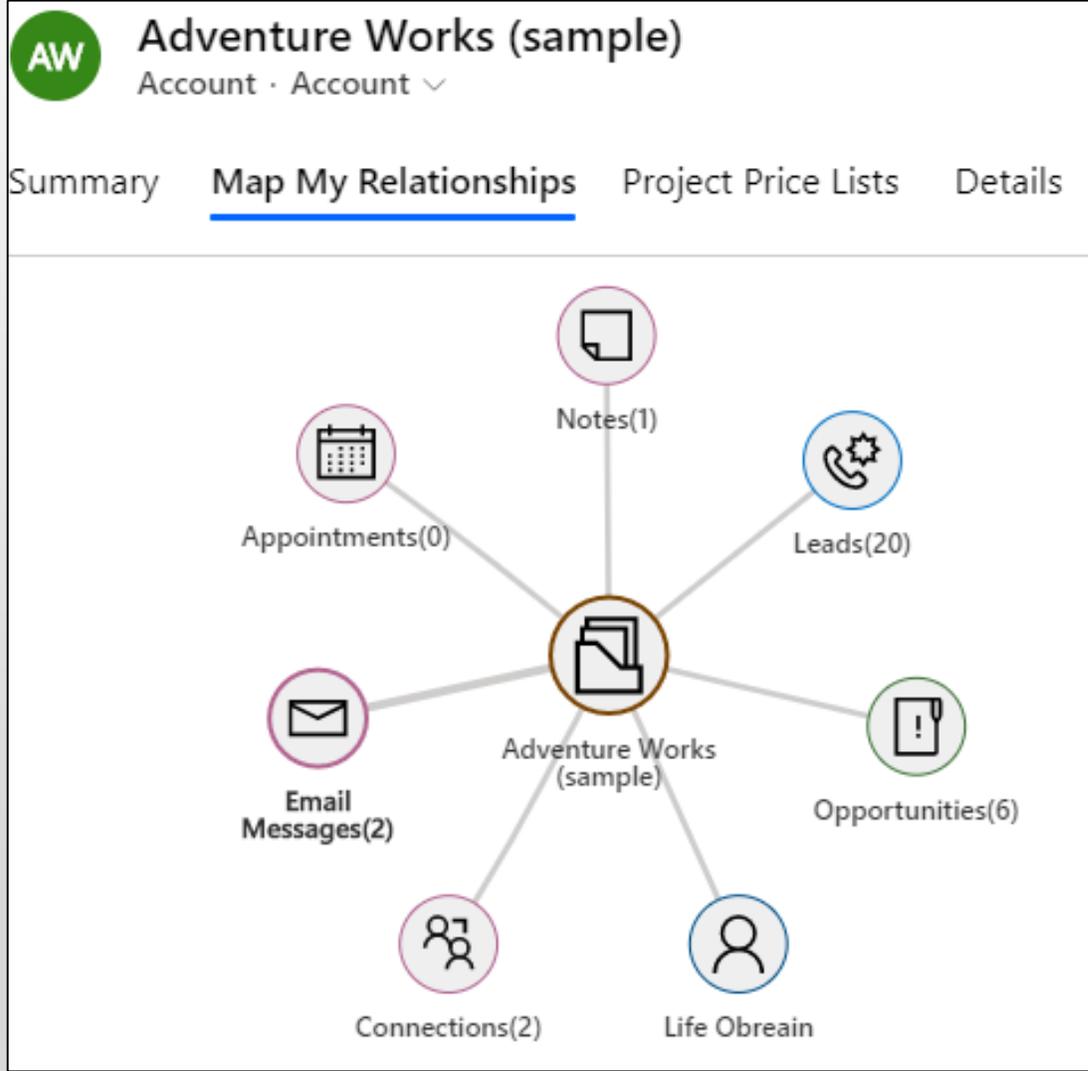
Follow up

Email Messages(2)

Adventure Works (sample)

360 degrees view
Get 360 degrees view of all important data of the record in a single view.

Display Images to Identify Types of Records



Display Images to Identify Types of Records
Set image of your choice for respective records for easy identification

Perform Quick Actions with a Click

Adventure Works (sample)
Account · Account ▾

\$60,000.00 Annual Revenue | 4,300 Number of

Summary Map My Relationships Project Price Lists Details Field Service Files Scheduling Related

MapMyRelationships

Connections(2)

Appointments(0)

Notes(1)

Adventure Works (sample)

Email Messages(2)

Leads(20)

Life Obreain

Opportunities(6)

Status - Open(5)

Interested in Life products

Request for 2 products

Request for HM products

- Appointment
- Email
- Task

Perform Quick Actions with a Click
create quick activity records without navigating to entity records

Hover to View Record Details

Adventure Works (sample)
Account · Account ▾

\$60,000.00 Annual Revenue | 4,300 Number of E

Summary Map My Relationships Project Price Lists Details Field Service Files Scheduling Related

MapMyRelationships Connections(2)

Life Obreain

Adventure Works (sample)

Email Messages(2)

Leads(20)

Opportunities(6)

Status - Open(5)

Interested in PK line products

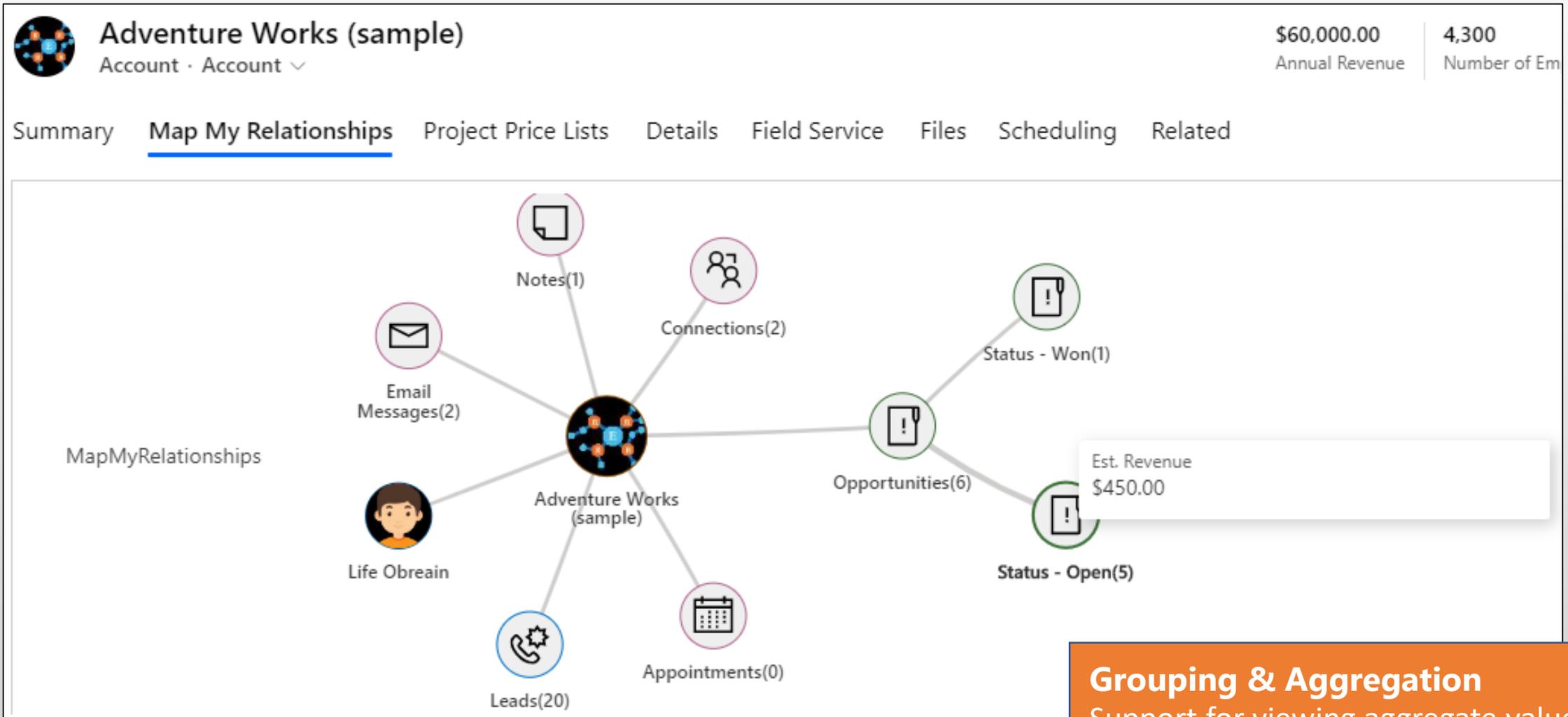
Interested in DK lines

Enquir life pr

Potential Customer
Adventure Works (sample)
Est. Revenue \$400.00
Est. Close Date 11/20/2019

Hover to View Record Details
View details of records just by hovering the cursor on the respective record

Grouping & Aggregation



Grouping & Aggregation
Support for viewing aggregate values without the need for creating rollup fields.

Create Associate Record



Create Associate Record

Quickly create a new entity record through the entity node in the relationship view in just 1 click.

Connect Records

AD A Datum (Sample Data)
Account · Account ▾

--- Annual Revenue | --- Number of Employees | Owner

Summary Project Price Lists Details Field Service Scheduling Files Relationship View **Connection** Assets and Locations Related

Connect To ▾

Ab McCormick Connect

Business >
Sales Team >

Expressed interest in A. Datum X line of printers

Opportunities(2)

Follow-up with information regarding our promotions

A Datum (Sample Data)

Connections(0)

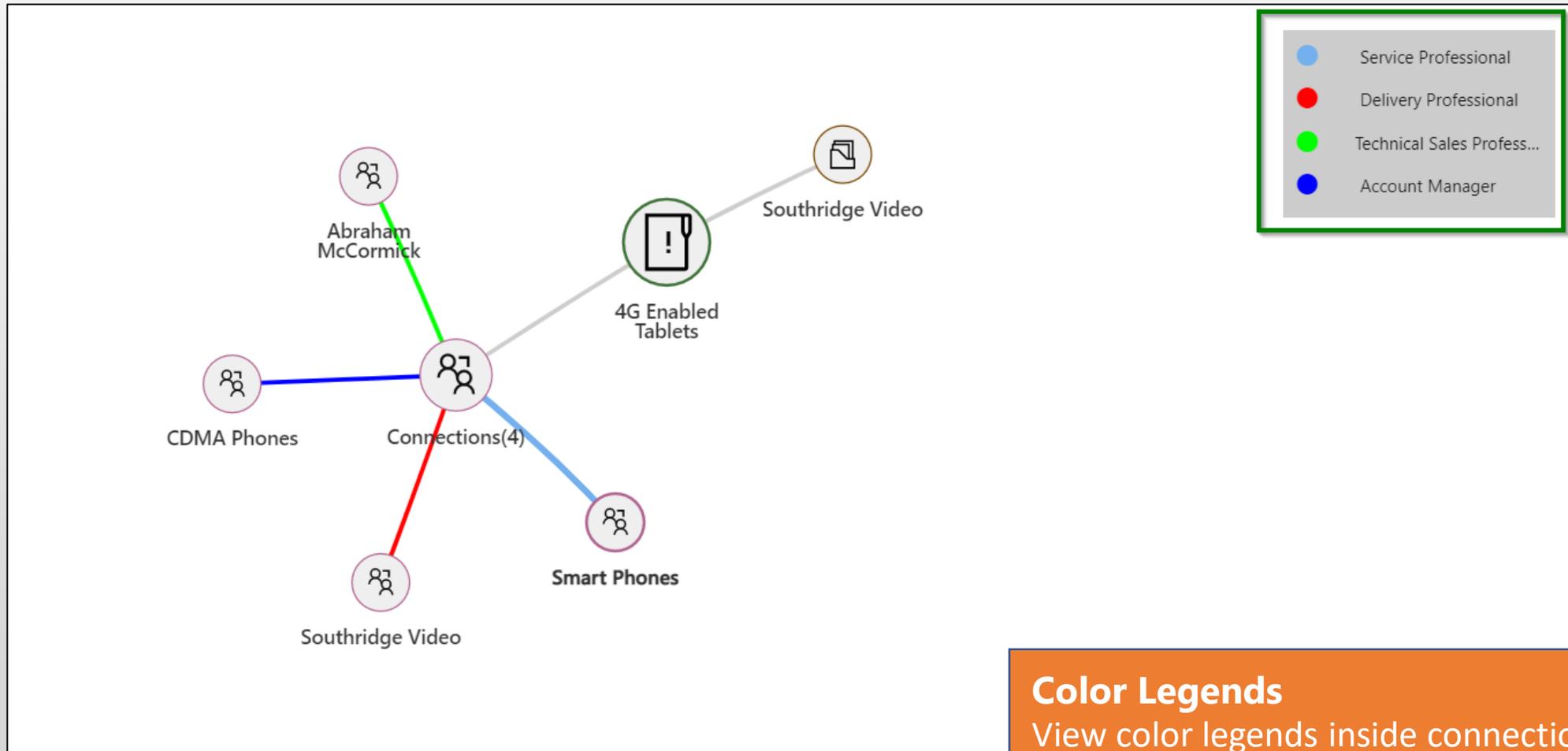
Quotes(1)

Contacts(1)

Connect Records

Drill down N-level and create a connection from within the connection relationship view

Color Legends



Color Legends

View color legends inside connection relationship view indicating the connection roles that the records are connected with

Next Steps

Learn more about [Map My Relationships](#) today.

Get your free **Map My Relationships** trial from [Microsoft AppSource](#) or [our website!](#)

Email: crm@inogic.com

