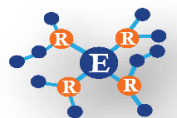


**Map My
Relationships**

Mind Map Visualization of Dynamics 365 CRM Records



**Map My
Relationships**

crm@inogic.com

inogic

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

☰

Home

Recent

Pinned

Settings

Entity Configurations

License Registration

←

Show Chart

+ New

Delete

Refresh

Email a Link

Flow

Run Report

Active Entity Configurations

✓

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

Entity Configuration

Dynamics 365

Map My Relationships

Home

Recent

Pinned

Settings

Entity Configurations

License Registration

Save Save & Close New Deactivate Delete Refresh Export to PDF Assign Share Email a Link Flow

Opportunity

Entity Configuration

General Related

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_opportu	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**

Relationship *

opportunity_customer_accounts(opportunity) x ▼

Entity Configuration *  **Account - Pre Sales Process**

Child Configuration ---

Node Settings

Relationship Node Image **Entity Image**

Allowed Actions

x Appointment (Appointment) x ▲ ▼

View to show fields on Tooltip

Opportunities Being Followed x ▼

Cluster Settings


Group By

Status (statecode) x ▼

Measure

Est. Revenue (estimatedvalue) x ▼

Aggregate Type * **SUM**

 **Map My Relationships**

crm@inogic.com

inogic

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

Sper
Own

Opportunity Sales Process
Active for 17 days

Qualify

Develop

Propose (17 D)

Summary

Products

My Connections

Connection Test





Subjections

Relationship View

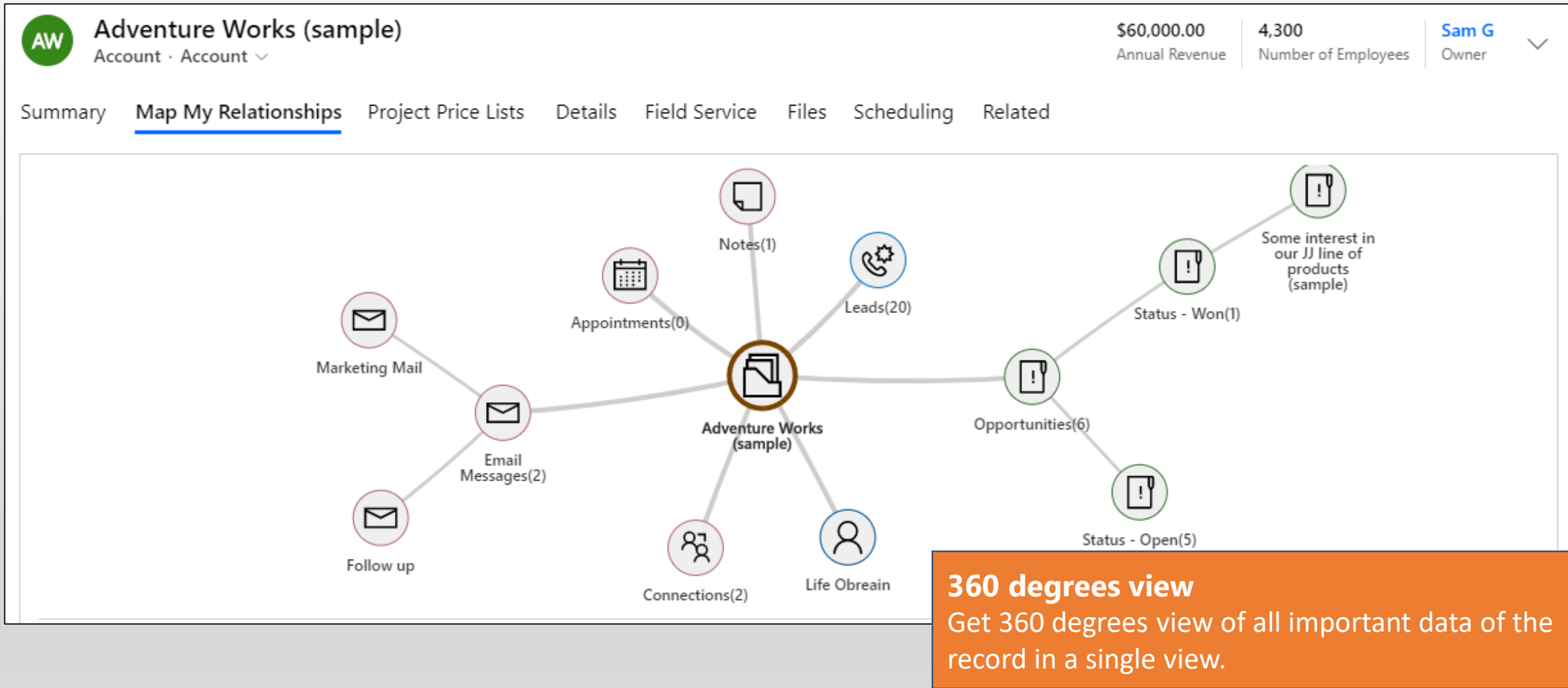
Latest Topics

Topics Simple

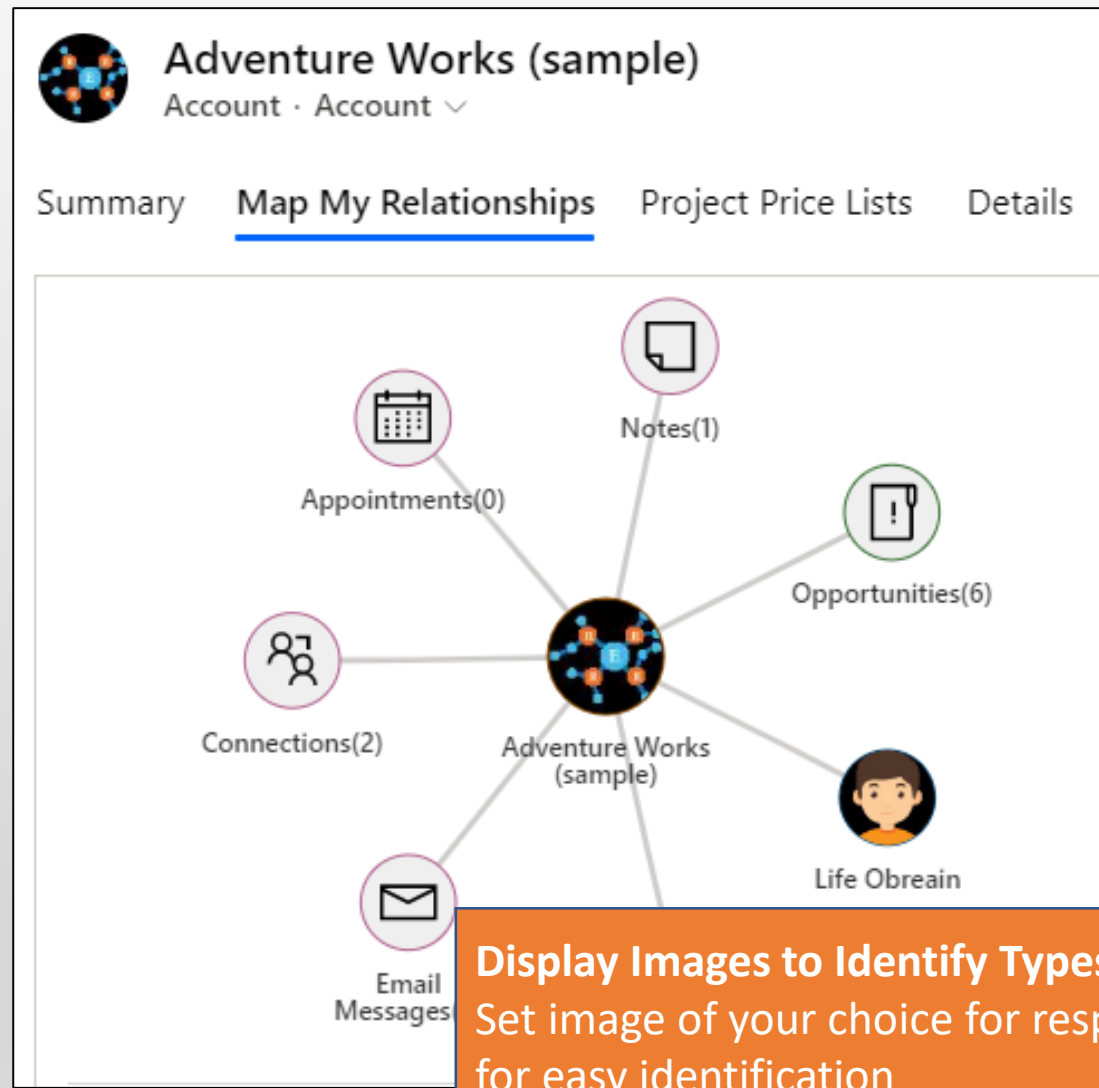
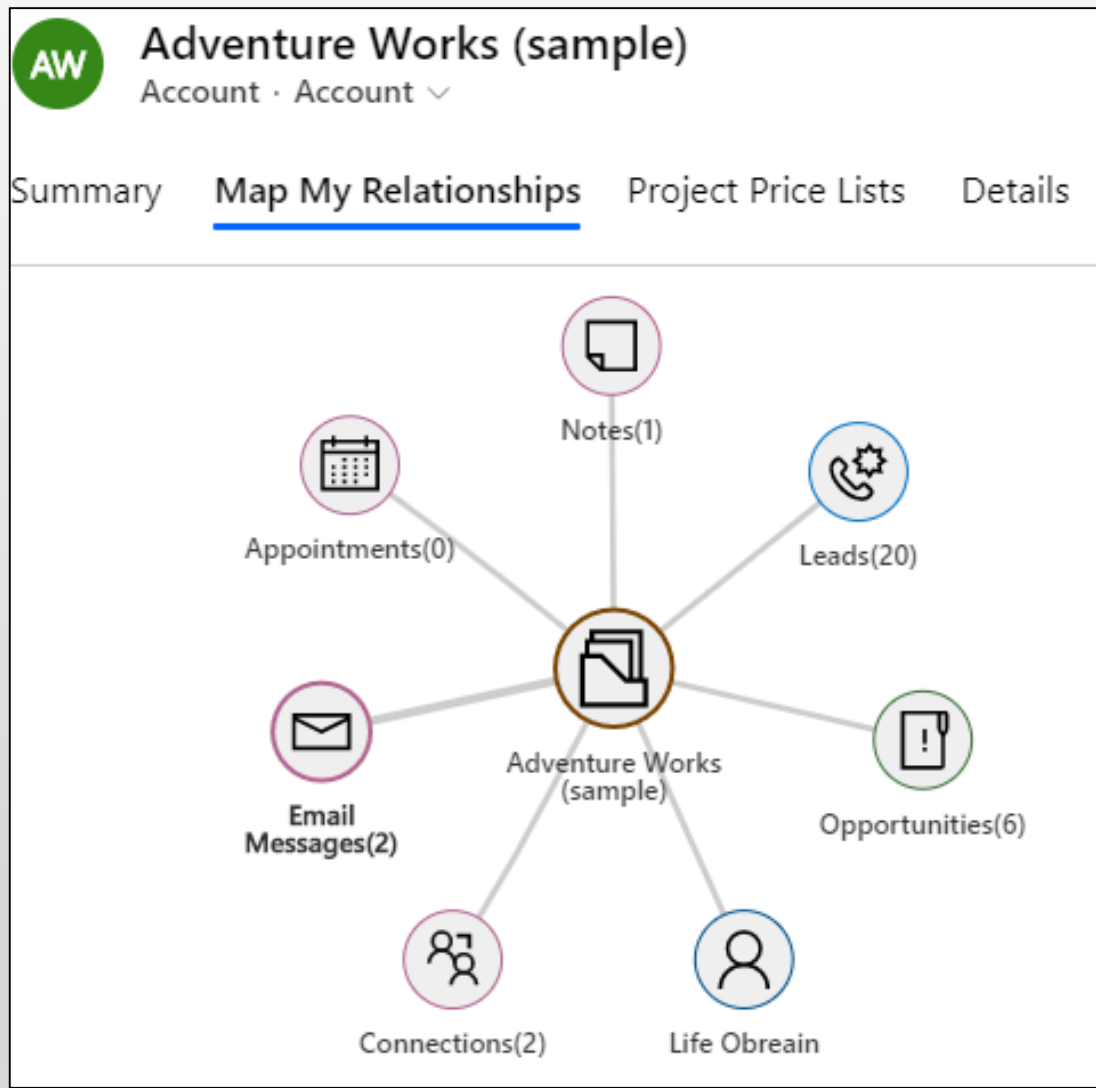
...

	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

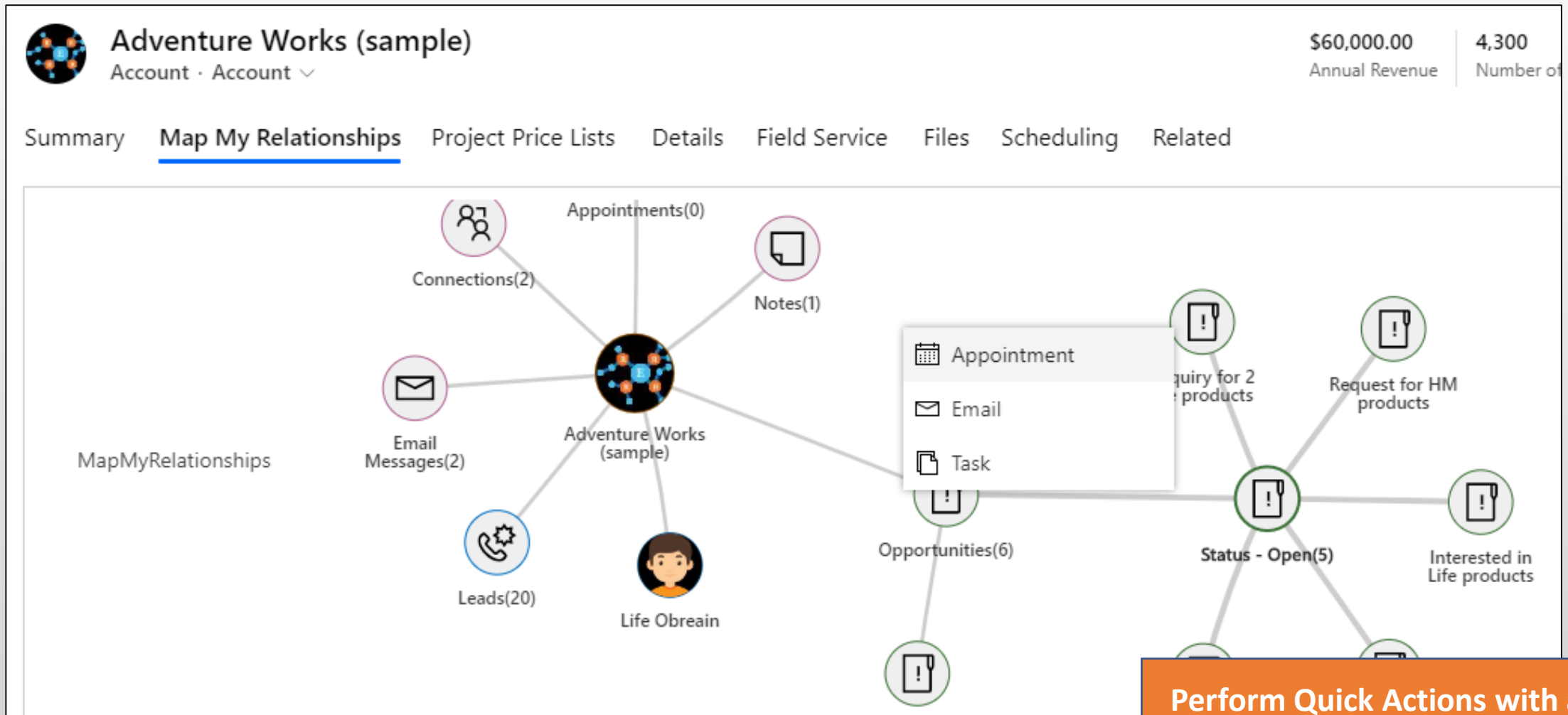


Display Images to Identify Types of Records



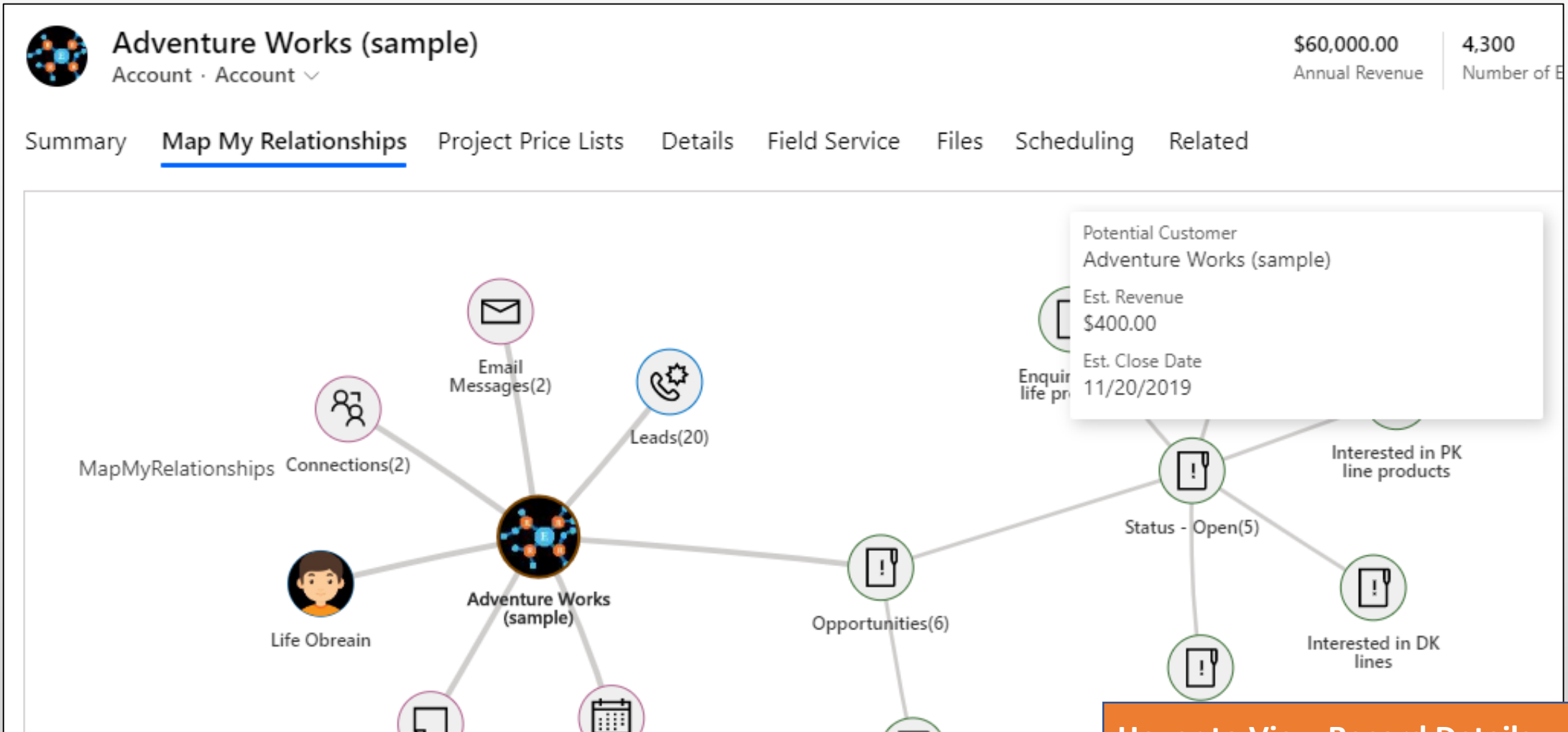
Display Images to Identify Types of Records
Set image of your choice for respective records for easy identification

Perform Quick Actions with a Click



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

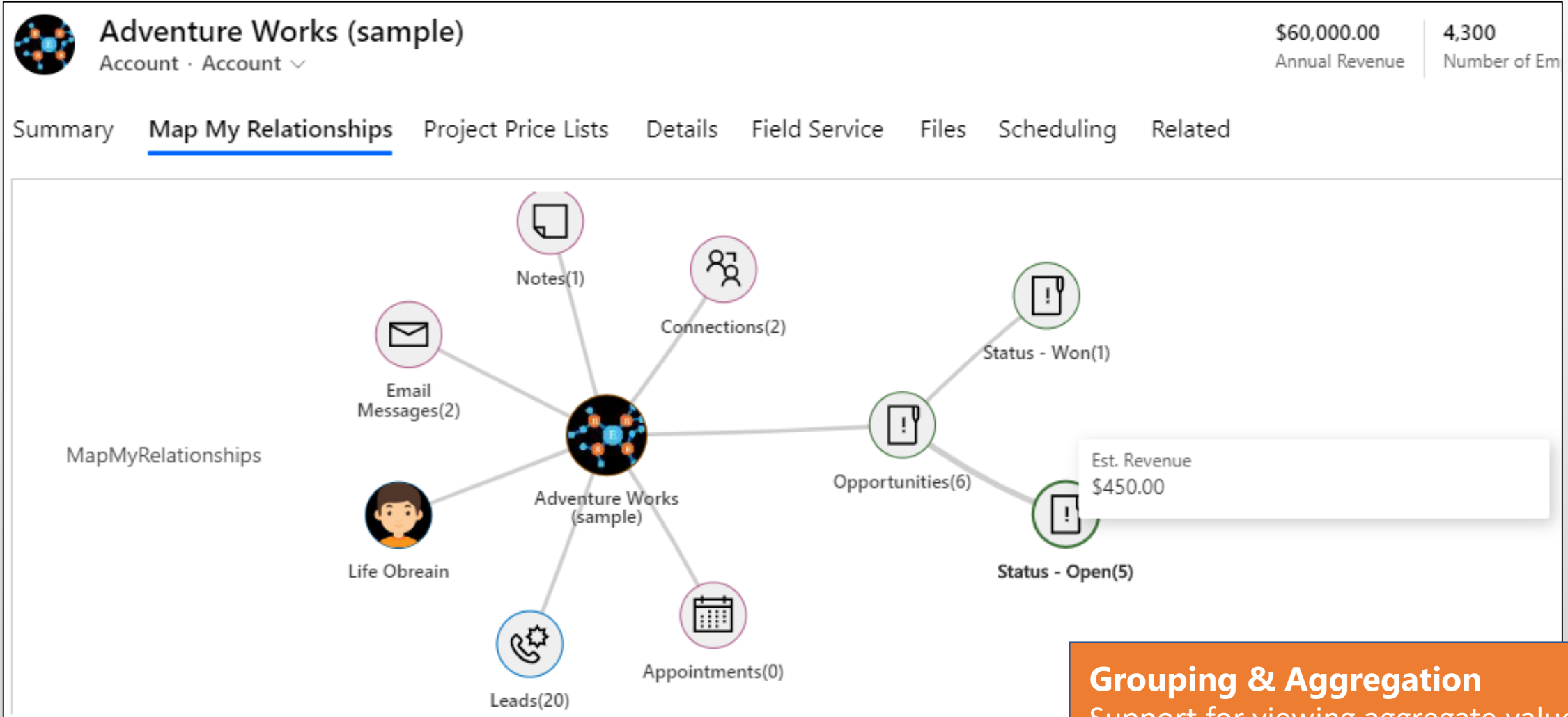
Hover to View Record Details



Hover to View Record Details

View details of records just by hovering the cursor on the respective record

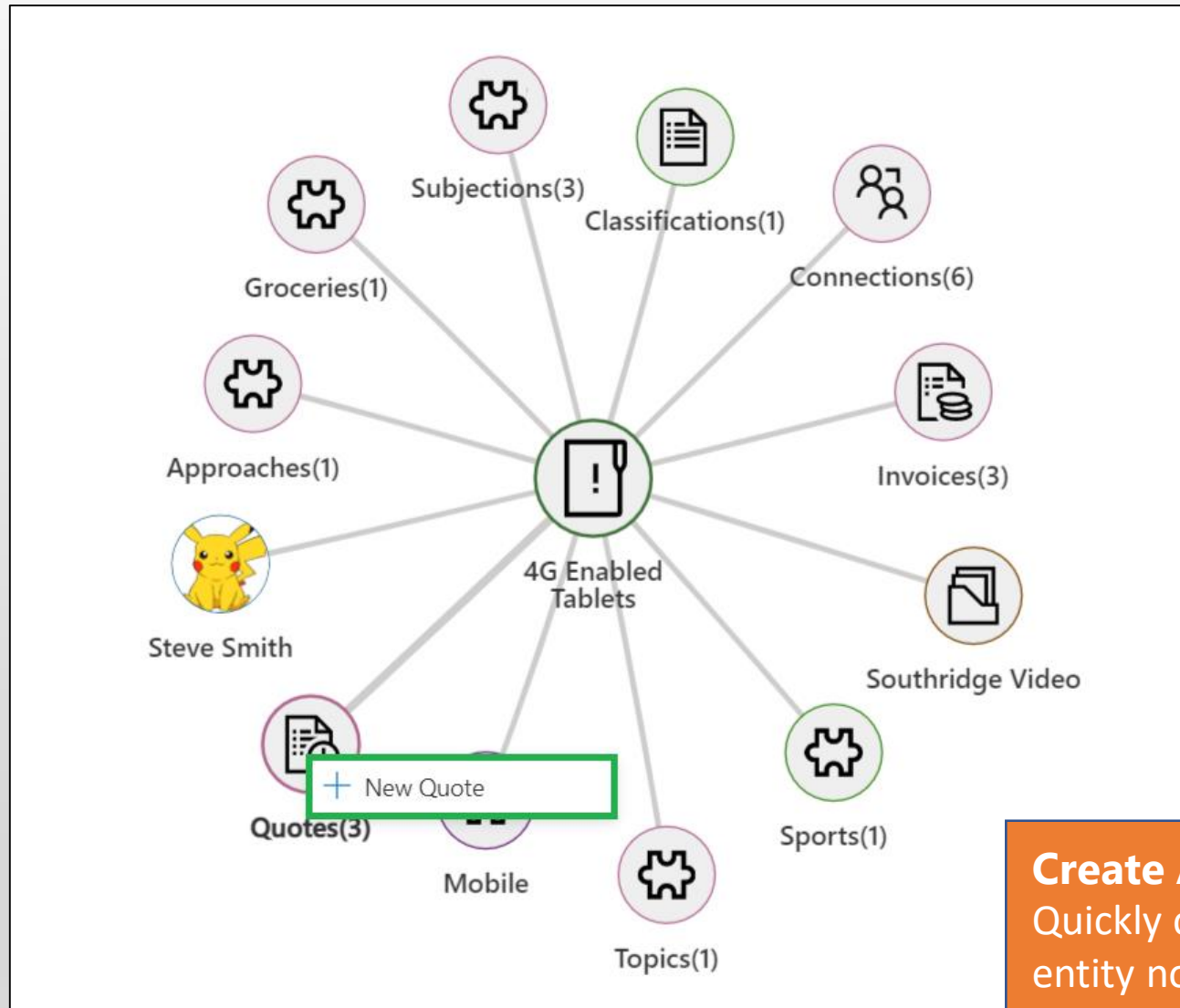
Grouping & Aggregation



Grouping & Aggregation

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

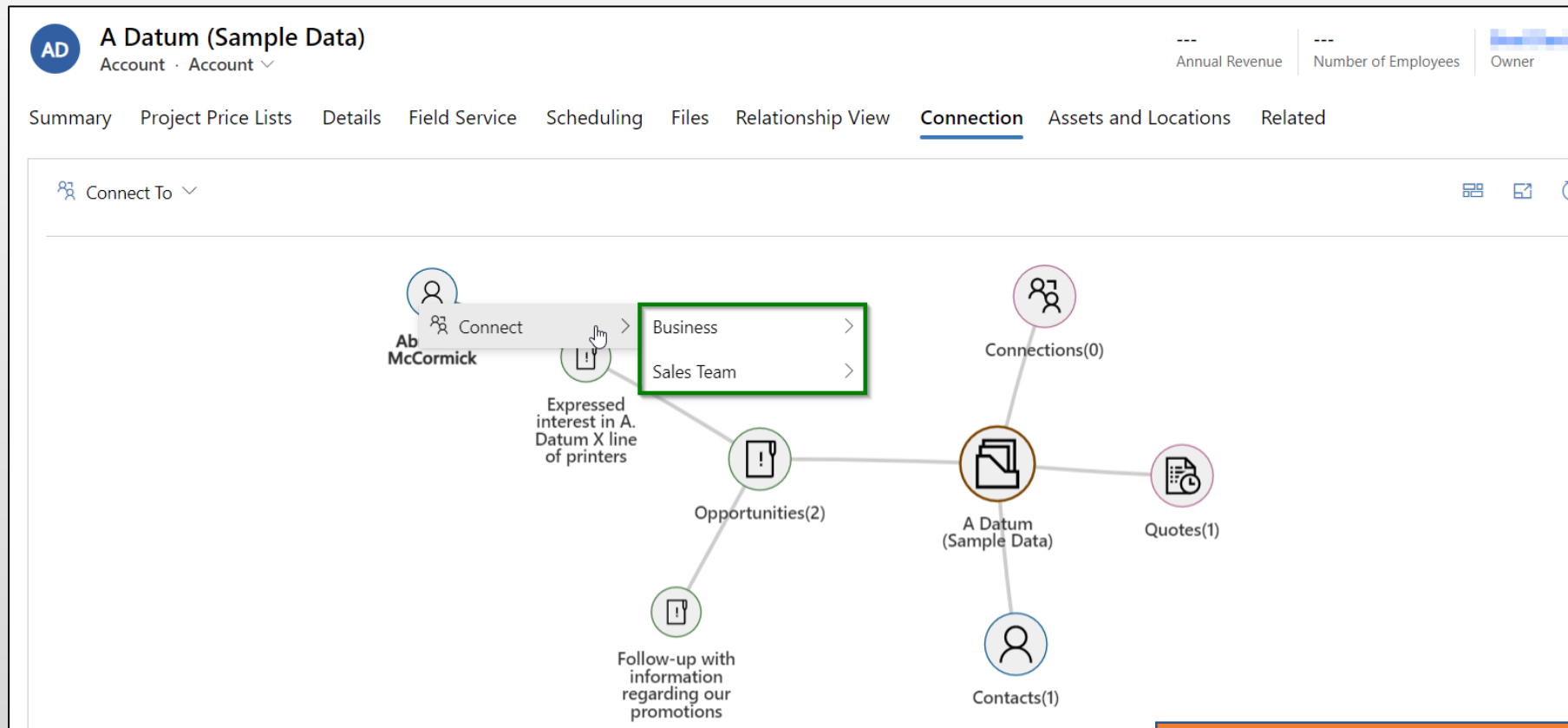
Create Associate Record



Create Associate Record

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

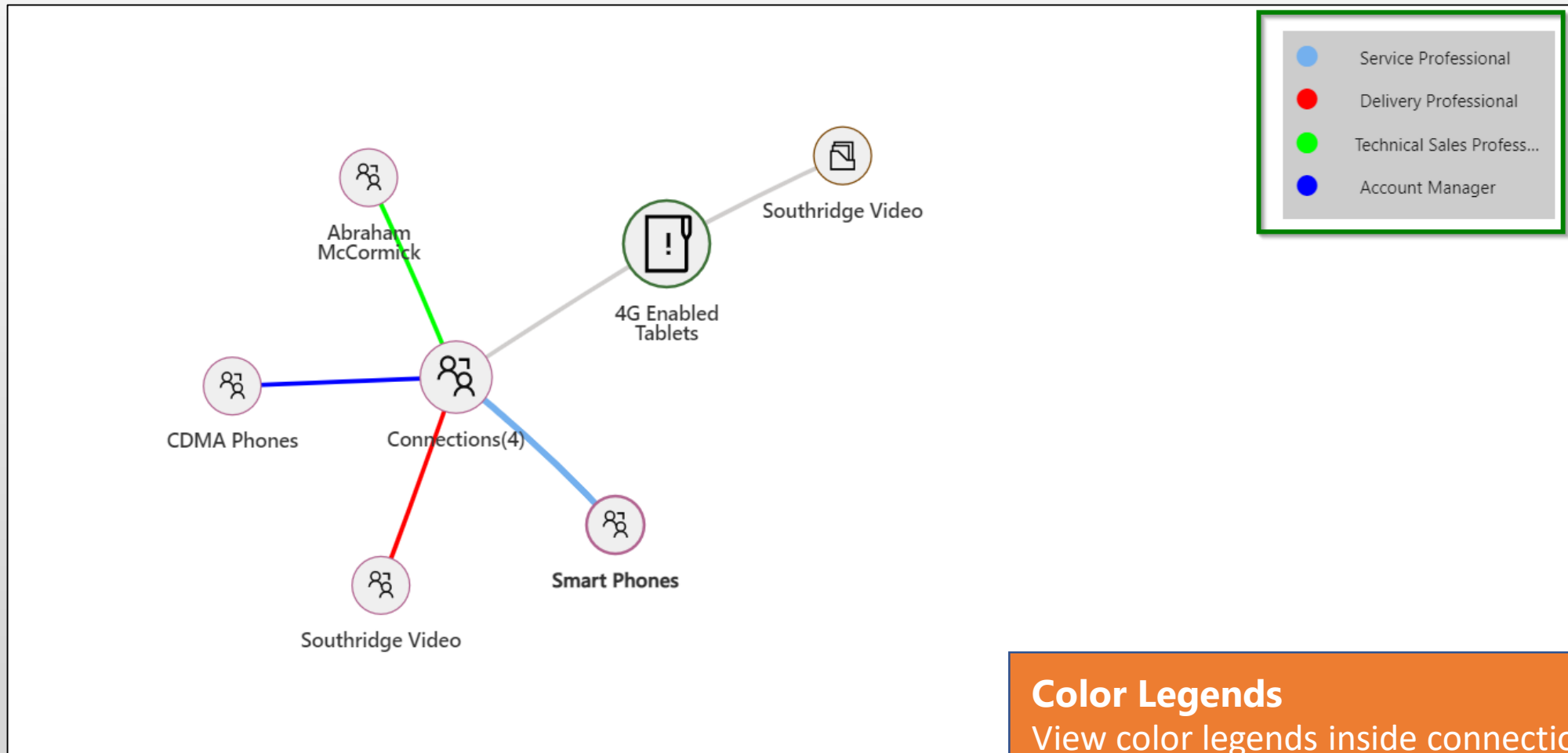
Connect Records



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

