

Map My Relationships



User Manual

Content

| | |
|--|----|
| Introduction | 3 |
| Salient Features - Map My Relationship control | 3 |
| Salient Features - Map My Connection control | 3 |
| Relationship and Connection Controls | 4 |
| Security Roles..... | 6 |
| Map My Relationships Control | 7 |
| Map My Relationships – Basic Configuration | 7 |
| How to get relationship schema name? | 12 |
| Map My Relationships – Advance Configuration..... | 20 |
| General configuration details: | 20 |
| Drill down through relationships: | 30 |
| New entity record creation through relationship view | 37 |
| Map My Connections Control | 38 |
| Create Connections within Relationship View..... | 76 |
| Colour legends in connection relationship view..... | 81 |
| Contact Us..... | 83 |

Introduction

Map My Relationships is a productivity app that enables Dynamics 365 CRM users to visualize relationships between Entities or related records in a single view and network style UI. It also allows users to easily navigate to related records and perform various activities like create Email, Phone Call or Appointment. Users can thus, get information at a glance leading to swift action and timely completion of various tasks.

Map My Relationships solution has two custom controls – **Map My Relationships** and **Map My Connections**. Map My Relationships custom control is used to map all the relationships associated to the parent record. Whereas, Map My Connections control, as the name suggests would focus only on managing the connections for a respective entity record.

The idea behind developing this connection control is to simplify the way of creating and updating the connections and manage them efficiently. This control allows user to see the connections in both grid as well as relationship view format (Network Style UI).

Salient Features - Map My Relationship control

- 360 degrees view of all important data of the record in a single view
- Support both OOB and custom entities
- Support for 1:N, N:1 as well as N:N information
- Begin with a quick summary with the ability to drill down to the details
- Navigate easily and quickly to any of the records in the relationship
- Ability to quickly record any activity like phone call or appointment for the related records
- Support for viewing aggregate values without the need for creating rollup fields
- Control can be configured for Unified, Mobile and Tablet experience
- Provision to set up the child configuration to further drill N-level down through the relationships
- Provision to quickly create a new entity record through the entity node in the relationship view in just one click

Salient Features - Map My Connection control

- Capability to configure the connection control to create, update, view and delete the connection records more efficiently to improve an overall connection management
- Ability to add filters on connection role categories and entities that user wishes to create a connection with. Connection role category filters like; Sales Team, Business, Family etc and entity filters like; account, contact etc

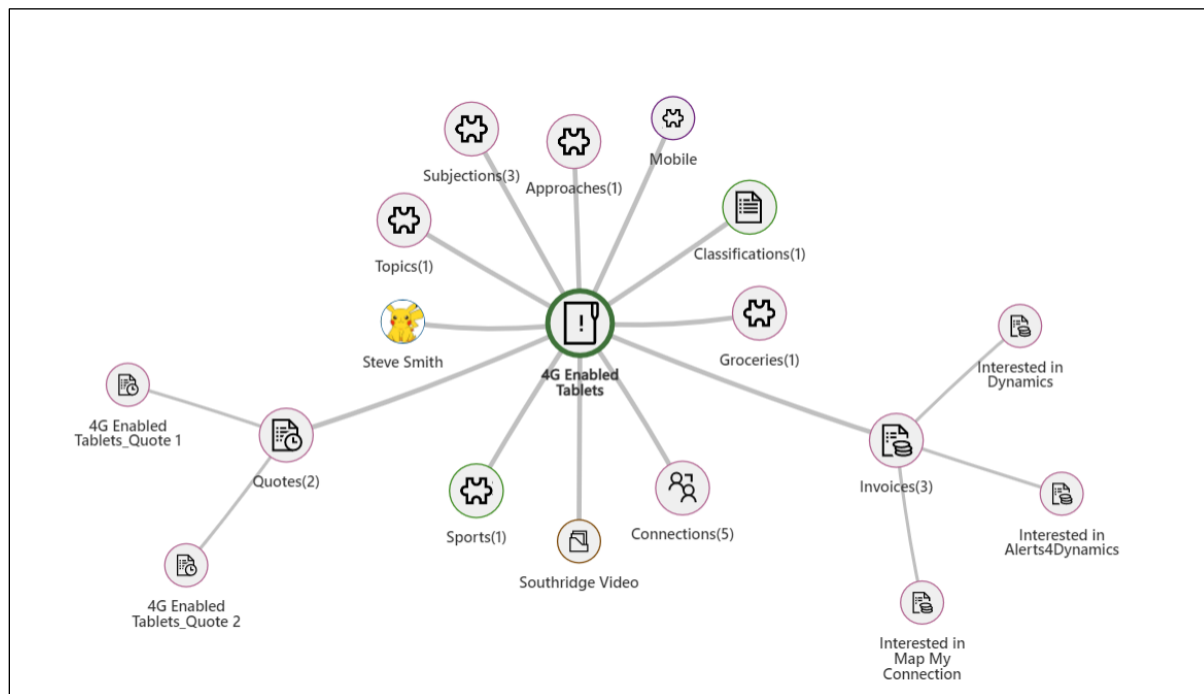
- View it in user's preferred format - grid/card/relationship view
- Allows to add multiple controls on a single form with various filters and conditions to show the connections based on that.
- Easier and quicker way for user to search and navigate to a record through the relationship view of Connections.
- Ability to drill N-level down through the relationships and connect a record straight from the connection relationship view itself.
- Allows user to see the colour legends inside connection relationship view indicating the respective connection roles that the records are connected through.

Available for: Microsoft Dynamics 365 CRM 9.1 & above, Dataverse (Power Apps)

Deployment: Online

Relationship and Connection Controls

Map My Relationships:



Map My Connections – Larger Grid:

4G Enabled Tablets

Opportunity · Opportunity

3/6/2017
Est. Close Date

\$3,257,500.00
Est. Revenue

In Progress
Status

Spencer Low (Sample Data)
Owner

Opportunity Sales Process
Active for 31 days

Qualify

Develop

Propose (31 D)

Close

Summary

Products

My Connections

Connection San

STD

Connection Test

Connection Tiny View

Subjections

Relationship View

...

Connect To

| Connected To ↑ | Role (To) | Description | Connection Name |
|--|--------------------|-------------|-------------------------------|
| <div>AE</div> Adventure Works Electronics | Sales Professional | | Adventure Works Electronics |
| <div>CL</div> City Power & Light | Sales Professional | | City Power & Light |
| <div>DF</div> Derby FC | Sales Professional | | Derby FC |
| <div>M</div> Map My Relationships solution | Account Manager | | Map My Relationships solution |

Map My Connections – Smaller cards:

Connect To

CL

City Power & Light
Sales Professional

DF

Derby FC
Sales Professional

M

Map My Relationships solution
Account Manager

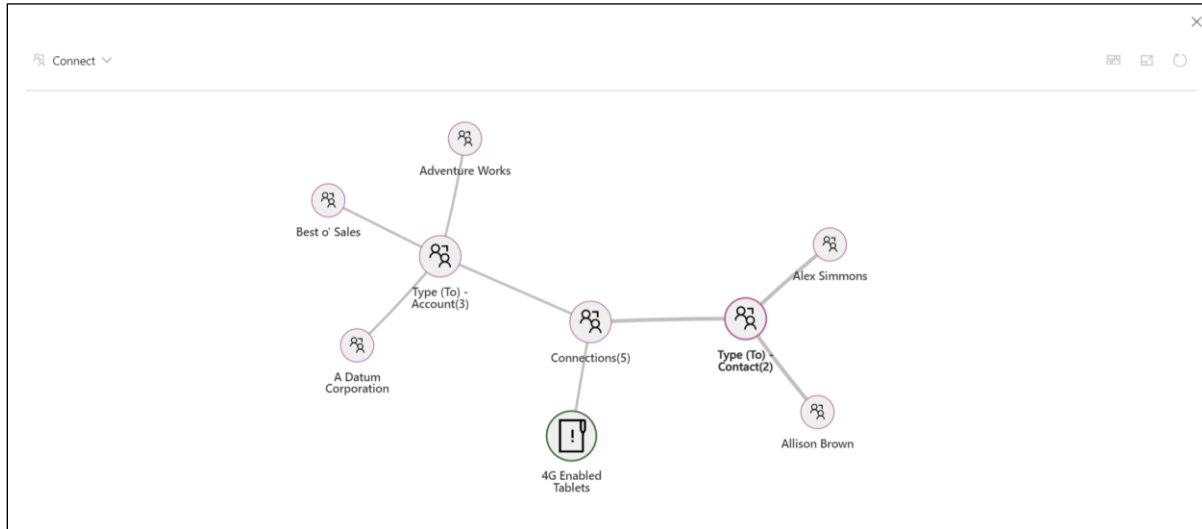
SC

Sample Contact1
Sales Professional

SC

Sample Contact10

Map My Connections – Relationship view:



Map My Connections – Multiple sub-grids/controls on a single form:

Expressed interest in A. Datum X line of printers

6/5/2017

\$10,568,900.00

In Progress

Veronica Quek (Sample Data)

Opportunity · Opportunity

Project Service - Opport...

Qualify

Propose

Contract (29 D)

Close

Summary

Map My Connections

Products

Connections

Map My Relationships

Quotes

Field Service

Files

Related

Customer Stakeholders

Connect To

BK

Benno Kurmann

Stakeholder

info@fineartschool.net

RP

Rok Palčić

Stakeholder

Rok@northwindtraders.com

Sales Team

Connect To

BJ

Barry John

Industry Expert

Barry@DecDevCorp.onmicrosoft.c

GC

Gaurav Chatterjee

Delivery Professional

Gaurav@DecDevCorp.onmic

LL

Larry Lane

Territory Manager

Larry@DecDevCorp.onmicrosof

Connected Accounts

Connect To

AH

Alpine Ski House

Employer

Cathan@alpineskihouse.com

BA

Blue Yonder Airlines

Employer

brian@blueyonderairlines.com

CL

City Power & Light

Employer

walter@cpandl.com

NT

Northwind Traders

Partner

alexw@northwindtraders.com

Security Roles

Two security roles, particularly for **Map My Relationships**, come along with the solution.

1. **Map My Relationships Administrator** – The Administrator has given the privilege for License Registration and has organization-level access of all entities of Map My Relationships i.e. Entity Configuration and Entity Relationships. The user with having this role would be able to set up

the Map My Relationships view using advanced configuration i.e. would be able to define settings in Entity Configuration and Entity Relationships records.

2. **Map My Relationships User** – The users with having this role would be able to see the Map My Relationships view in Dynamics 365 forms.

Note: System Administrator has all the rights that Map My Relationships administrator has.

Map My Relationships Control

Map My Relationships has been built using the PowerApps Control framework. The Administrator of the system has to add the Map My Relationships control on the entity forms. To configure the view the administrator has two options i.e. basic configuration and advanced configuration. The below table highlights the difference between basic configuration and advanced configuration.

| Particulars | Basic Configuration | Advanced Configuration |
|---|---------------------|------------------------|
| Define all types of relationships | Yes | Yes |
| Perform default actions (Create email, Phone Call and Task) | Yes | Yes |
| Configure tooltips to see more information of related records | No | Yes |
| Configure which actions to allow for related records | No | Yes |
| Configure which images to display to identify related records | No | Yes |
| Configure grouping and aggregation for related records | No | Yes |

Map My Relationships – Basic Configuration

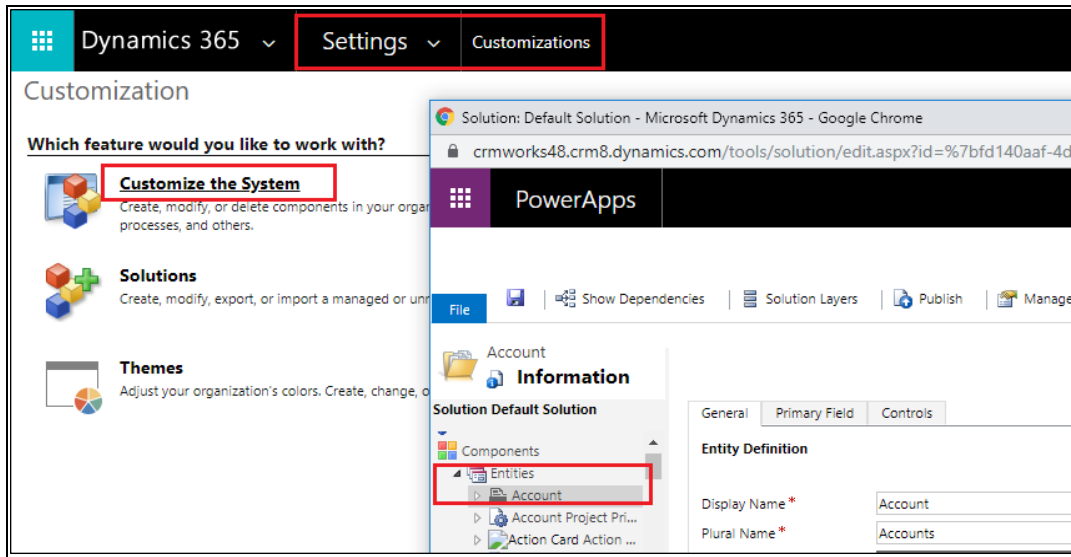
Prerequisites: The user should have the System Administrator or System Customizer role.

Add Map My Relationships view on the form: Decide the entity on which the users would be able to see the related records of that entity. The entity may be a common use entity.

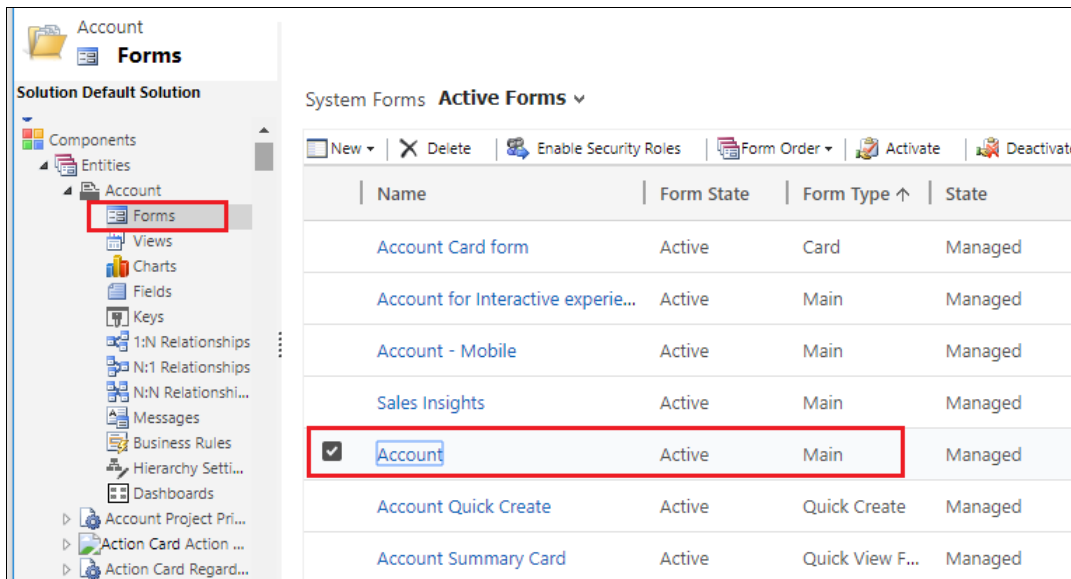
Note: The Administrator can configure the Map My Relationships control for any number of entities in the system.

In this document, we will configure the Map My Relationships for the Account entity.

1. Navigate to **Default Solution Settings → Customizations → Customize the System → Expand Entities** and select the entity.



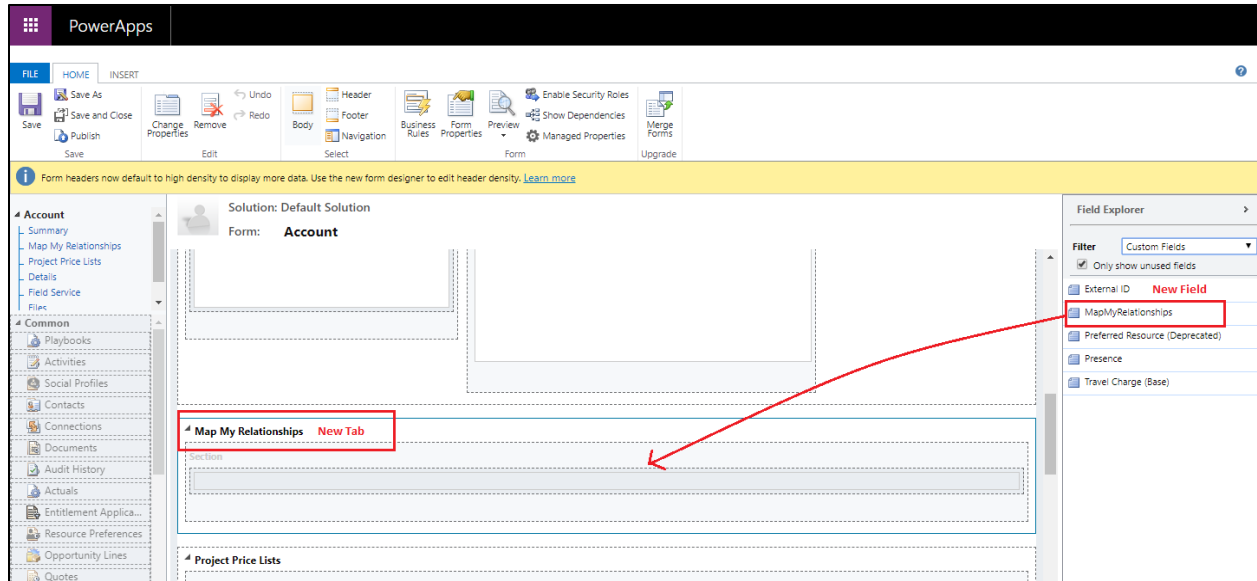
2. Expand the selected entity and open the form on which the Map My Relationships view needs to be added.



3. The next step is to bind a Map My Relationships control to any text field. The Best approach is to create a new text type of custom field. Add a custom text field on the form wherever the users/administrator likes to see it. There is no limitation on where to add the Map My Relationships view on the form.

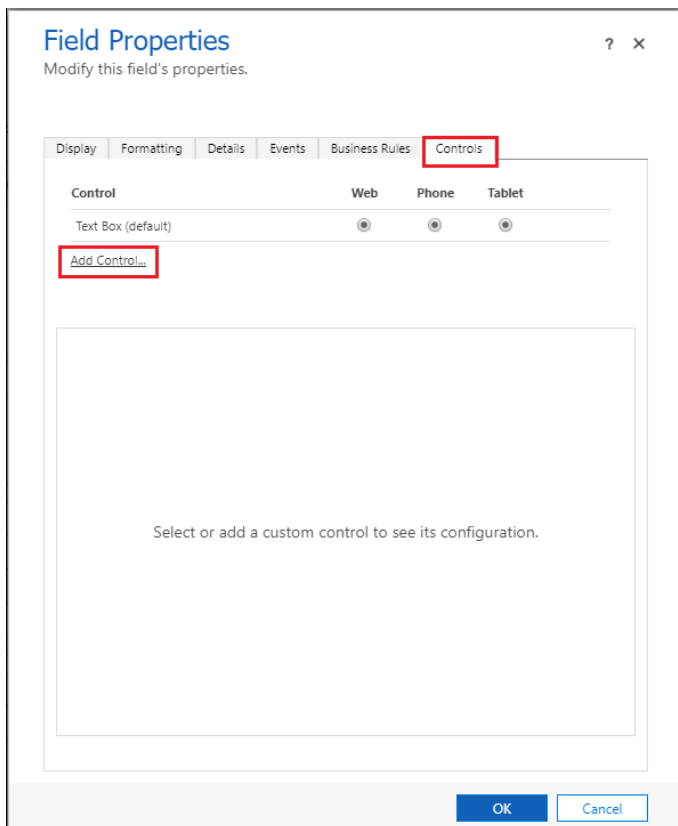
Go to existing tab or a new tab on the form and add newly created custom field in the section.

Map My Relationships – User Manual

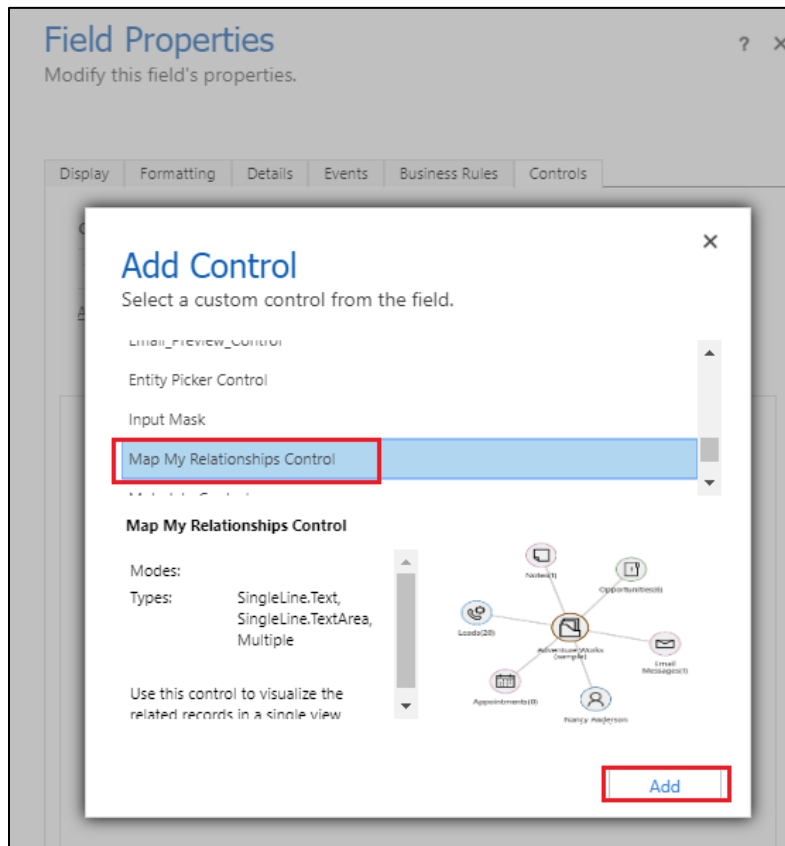


Note: New field of type text is required to bind Map My Relationships control. The field does not hold any data.

4. Edit the properties of the field and bind control. In field properties, go to Controls and then click on Add Controls button.



Scroll down from the list of control and select the Map My Relationships control and click on 'Add' button.



5. Fill in the values for following properties, **'One to Many Relationships'**, **'Many to One Relationships'**, **'Many to Many Relationships'** and **'Allow Actions?'**

The first property **'Map My Relationships Control Configuration'** is for advanced configuration. (see section)

Field Properties
Modify this field's properties.

Display | Formatting | Details | Events | Business Rules | Controls

Control

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

Add Control...

Map My Relationships Control

| Property | Value |
|---------------------------------|------------------------|
| Field * | new_mapmyrelationships |
| Map My Relationship Control ... | |
| One to Many Relationships | |
| Many to One Relationships | |
| Many to Many Relationships | |
| Allow Action? | |

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

☐ Hide Default Control

OK Cancel

One to Many Relationships: Enter the comma separated one to many relationship schema names.

Ex: Account_Emails, Account_PhoneCalls

Here Account is the primary entity where control is being added and Email and Phone calls are related to account as 1:N relationship. This will show emails and phone call of the account record.

Follow 'How to get relationships schema name?' section to know how to find relationships schema name.

Many to One Relationships: Enter the comma separated many to one relationship schema names.

Ex: account_primary_contact, account_originating_lead

Here Account is the primary entity and contact (Primary Contact) and lead(Originating Lead) are the related entity with N:1 relationship.

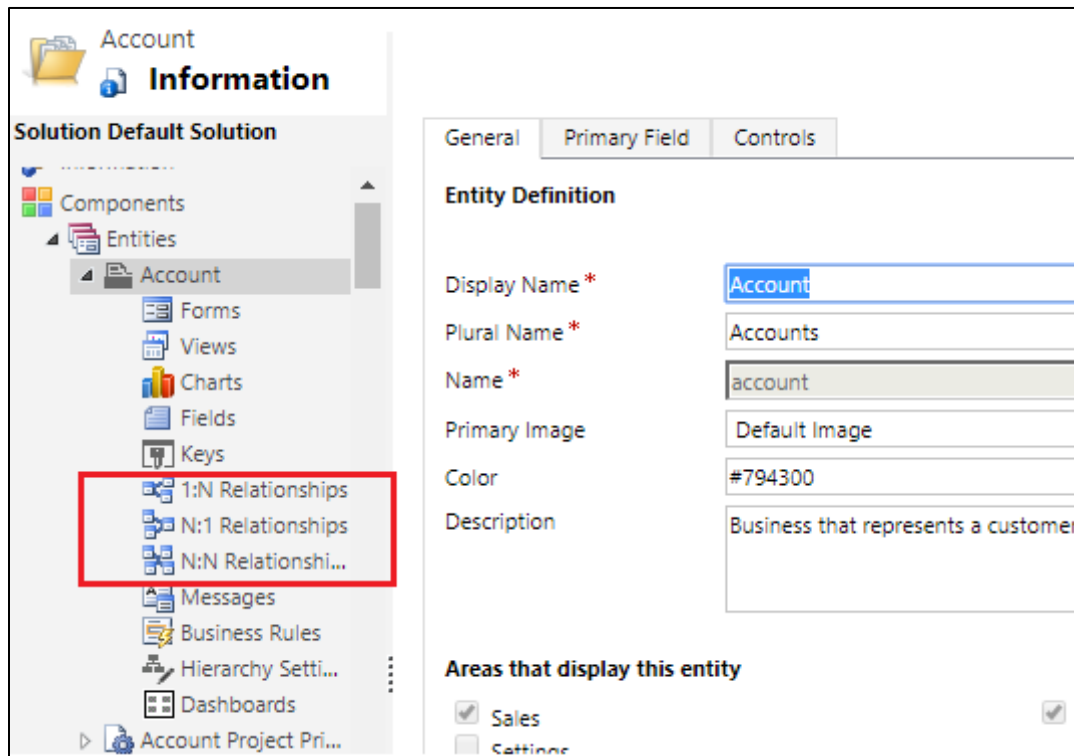
Follow 'How to get relationships schema name?' section to know how to find relationships schema name.

Many to Many Relationships: Enter the comma separated many to many relationship schema name.

How to get relationship schema name?

Prerequisites: The user should have System Administrator or System customizer role.

1. Go to **Settings → Customizations → Customize the Entity**.
2. Select the entity from **Entities** component.



3. Click on **1:N Relationships**, **N:1 Relationships** and **N:N Relationships** to get the list of relationships available in the system.

The screenshot shows the '1:N Relationships' page. The left sidebar has a tree view with '1:N Relationships' selected under 'Entities'. The main area shows a table of relationships with the following columns: Schema Name, Primary Entity, Related Entity, Type of Behavior, and Field Name.

| Schema Name ↑ | Primary Entity | Related Entity | Type of Behavior | Field Name |
|--------------------------|----------------|----------------|------------------|------------|
| account_actioncard | Account | Action Card | System | Regarding |
| account_activity_parties | Account | Activity Party | System | Party |
| Account_ActivityPointers | Account | Activity | System | Regarding |
| Account_Annotation | Account | Note | Parental | Regarding |
| Account_Appointments | Account | Appointment | Parental | Regarding |
| Account_AsyncOperations | Account | System Job | System | Regarding |

4. Open the relationship from the list and copy the **Schema name**.

One-to-Many & Many-to-One:

Relationship: Account to Appointment

Working on solution: Default Solution

General

Relationship Definition

Primary Entity *: Account

Related Entity *: Appointment

Name *: Account_Appointments

Searchable: Yes

Hierarchical: No

Lookup Field

Display Name *: Regarding

Name *: regardingobjectid

Field Requirement *: Optional

Description: Choose the record that the appointment relates to.

Many-to-Many: Let's take even more relevant example; contact having many to many relationship with invoices. For this, you will have to place the control on '**Contact**' entity form. In this occasion, we are considering to configure the relationship control only for '**Account**' entity.

Relationship: Contact to Invoice

Working on solution: Default Solution

General

Current Entity

Entity Name *: Contact

Display Option *: Do not Display

Display Area *: Details

Custom Label *:

Display Order *: 10,000

Other Entity

Entity Name *: Invoice

Display Option *: Do not Display

Display Area *: Details

Custom Label *:

Display Order *: 10,000

Relationship Definition

Name *: contactinvoices_association

Relationship Entity Name *: contactinvoices

Searchable: Yes

5. Copy this name in comma separated format in properties of the **Map My Relationships** control.
6. Click the edit button which is present against the property. This will open a 'Configure Property...' window.

Field Properties

Modify this field's properties.

Display Formatting Details Events Business Rules Controls

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

[Add Control...](#)

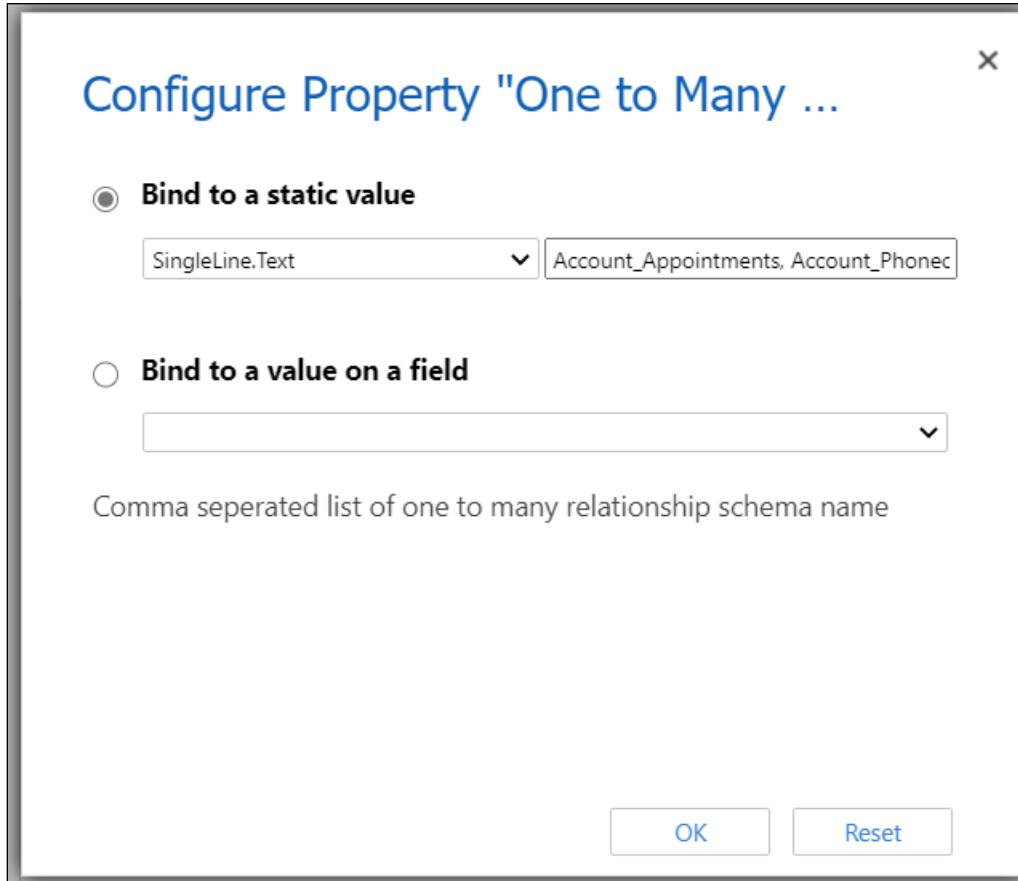
Map My Relationships Control

| Property | Value | |
|---------------------------------|------------------------|--|
| Field * | new_mapmyrelationships | |
| Map My Relationship Control ... | | |
| One to Many Relationships | | |
| Many to One Relationships | | |
| Many to Many Relationships | | |
| Allow Action? | | |

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

☐ Hide Default Control

7. Select '**Bind to a static value**' and enter the comma separated relationship schema name.



The screenshot shows a dialog box titled "Configure Property 'One to Many ..." with a close button (X) in the top right corner. The dialog contains two radio button options. The first option, "Bind to a static value", is selected. Below it, there is a text input field containing "SingleLine.Text" with a dropdown arrow, followed by a text input field containing "Account_Appointments, Account_Phonec". The second option, "Bind to a value on a field", is unselected. Below it, there is an empty text input field with a dropdown arrow. At the bottom of the dialog, there is a label "Comma seperated list of one to many relationship schema name" and two buttons: "OK" and "Reset".

Configure Property "One to Many ...

☒ **Bind to a static value**

SingleLine.Text ▼ Account_Appointments, Account_Phonec

☐ **Bind to a value on a field**

Comma seperated list of one to many relationship schema name

OK Reset

8. Repeat the above step for the other properties and fill the details.

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"/> |

[Add Control...](#)

Map My Relationships Control

| Property | Value |
|---------------------------------|---|
| Field * | new_mapmyrelationships |
| Map My Relationship Control ... | |
| One to Many Relationships | Account_Appointments, Account_Phone... |
| Many to One Relationships | account_originating_lead, account_prim... |
| Many to Many Relationships | |

☐ Hide Default Control

OK

Cancel

Allow Actions?: Specify whether the user should be able to perform actions such as Create Email, Create Phone Call or Create Task. Enter 0 for Yes and 1 for No. Default is Yes i.e. 0.

9. Select the device where the control should be displayed. Click 'OK' to save changes.

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_mapmyrelationships | |
| Map My Relationship Control ... | | |
| One to Many Relationships | Account_Appointments, Account_Phone... | |
| Many to One Relationships | account_originating_lead, account_prim... | |
| 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

10. Go to 'Display' field properties and uncheck 'Display label on the form'.

The screenshot shows the 'Field Properties' dialog box with the 'Display' tab selected. The 'Display' tab is highlighted with a red box. Below the tabs, the 'Label' section is expanded, showing a text input field with the value 'MapMyRelationships'. Below the text input, the checkbox 'Display label on the form' is unchecked and highlighted with a red box. The other sections, 'Field Behavior', 'Locking', 'Visibility', and 'Availability', are collapsed. The 'OK' and 'Cancel' buttons are at the bottom right.

Field Properties ? x

Modify this field's properties.

Display Formatting Details Events Business Rules Controls

Label

Specify the label for this field in forms.

Label * MapMyRelationships

☐ Display label on the form

Field Behavior

Specify field-level behavior

☐ Field is read-only

Locking

Specify whether to lock this field on the form.

☐ Lock the field on the form

Visibility

Specify the default visibility of this control.

☒ Visible by default

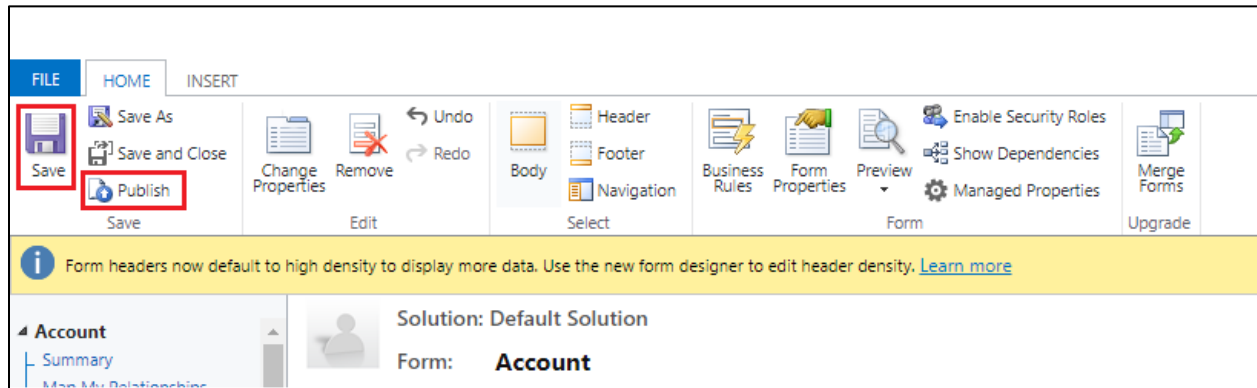
Availability

Specify the default availability of this field on phone.

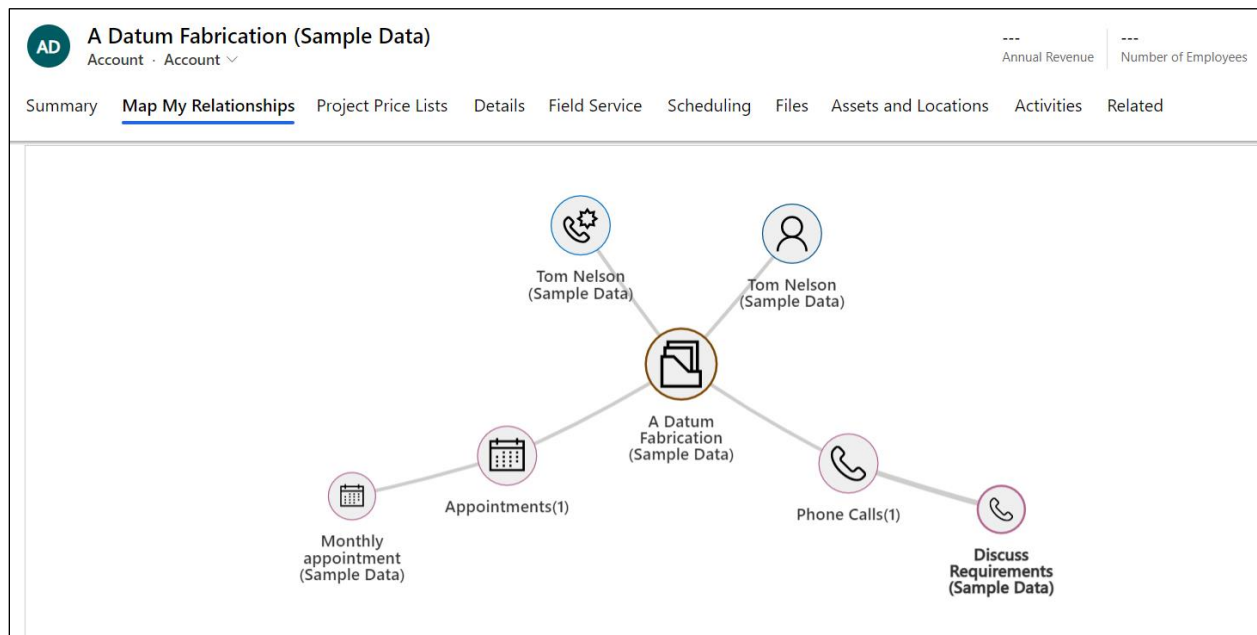
☒ Available on phone

OK Cancel

11. Save form and publish customizations.



12. After publishing successfully navigate to the record and check if the Map My Relationship control is working or not.



13. If the control shows following message, '**Something went wrong. Please check the configuration**' then check if the invalid relationships has been added in the properties or not. We can only add those relationship records which are available to read.

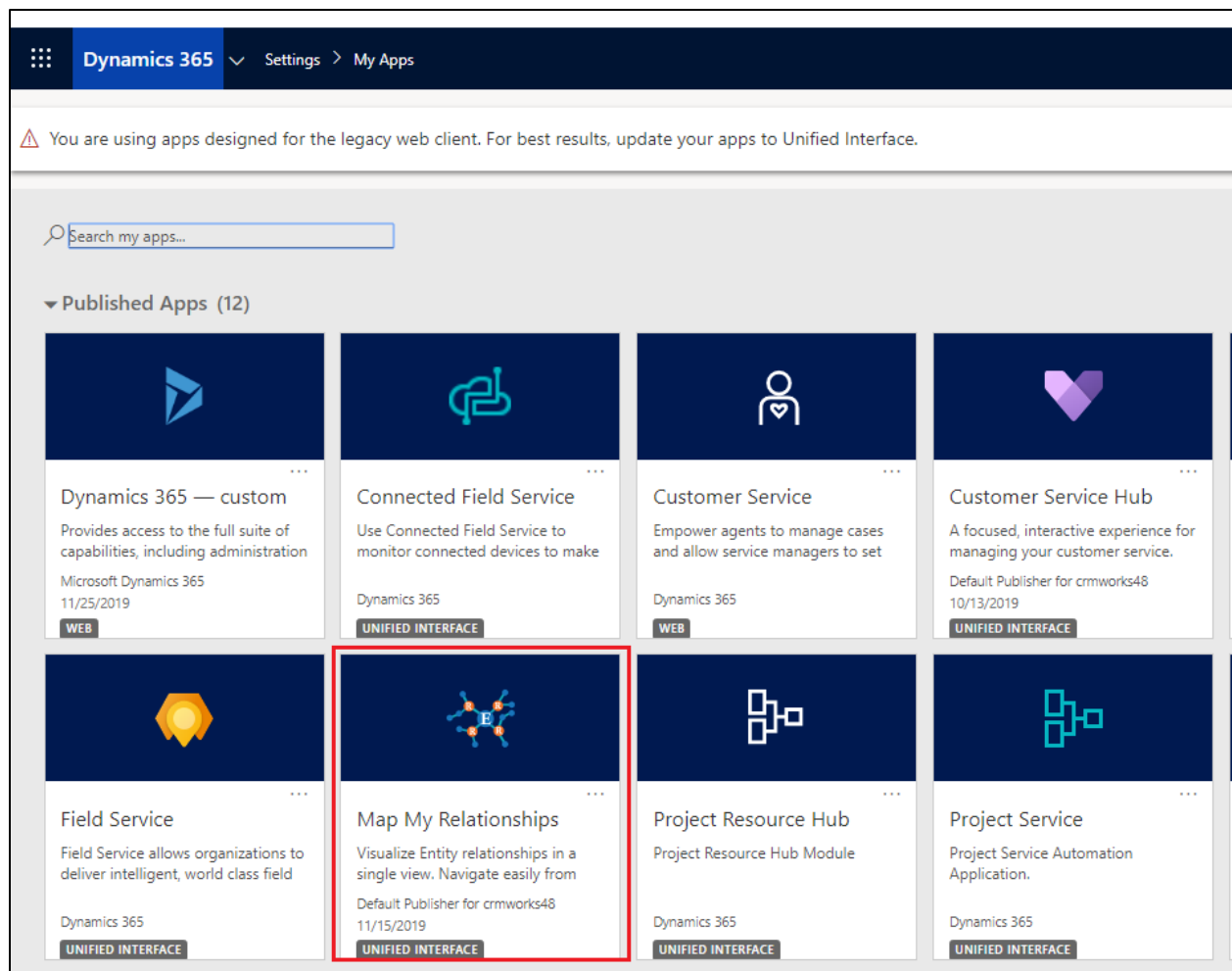
Map My Relationships – Advance Configuration

General configuration details:

Prerequisites: The user should have System Administrator or System customizer role. To create configuration records the 'Map My Relationship Administrator' role can be assigned to the user.

- 1. Entity Configuration:** This entity enables the system administrator to define for which entity the Map My Relationships view should be displayed.

Go to 'Map My Relationships' app and create 'Entity Configuration' entity record.



The screenshot shows the Dynamics 365 'Map My Relationships' application. In the left-hand navigation pane, under the 'Settings' section, 'Entity Configurations' is highlighted with a red box. The main content area displays the 'New Entity Configuration' form. This form has two tabs: 'General' and 'Entity Relationships'. The 'General' tab is active and contains the following fields:

- Name:** A text input field with a red asterisk indicating it is required.
- Entity:** A dropdown menu with a red asterisk, currently showing '--Select--'.
- Set As Default:** A radio button control currently set to 'No'.
- Entity Node Image:** A dropdown menu currently showing '--Select--'.
- Allowed Actions:** A dropdown menu currently showing '--Select--'.

The 'Entity Relationships' tab is visible on the right but contains no data.

- **Name:** Enter user friendly name for the record. This name will be used in the value for 'Map My Relationships Control Configuration' field property.
- **Entity:** Select the entity from the list of entity. This tells the control that the configuration is for the selected entity.
- **Set As Default:** Select 'Yes' or 'No' (depending upon which of the entity relationships user would like to further drill through)
- **Entity Node Image:** Choose which image needs to displayed on the node of the primary entity record. Available options are, Entity Image, Record Image and Image URL.
 - ➔ **Entity Image:** The image of the entity that we see for the entity in the sitemap.
 - ➔ **Record Image:** The image of the record that we see on the record. If image is not present for record then Entity image will be displayed.
 - ➔ **Image URL:** A field will be visible upon selection of this option. Enter the external or internal image URL.
- **Allowed Actions:** A list of activities present in the system. Select multiple activities from the list. The selected activities will be available for the user to create activities against the related record.
- **Entity Relationships:** The subgrid of 'Entity Relationships'

Map My Relationships – User Manual

The screenshot shows the Dynamics 365 'Map My Relationships' interface. The top navigation bar includes 'Dynamics 365' and 'Map My Relationships'. The left sidebar contains 'Home', 'Recent', 'Pinned', 'Settings', 'Entity Configurations', and 'License Registration'. The main content area is titled 'Account - Pre Sales Process' and 'Entity Configuration'. It has two tabs: 'General' (selected) and 'Related'. The 'General' tab contains the following fields:

- Name: * Account - Pre Sales Process
- Entity: * Account (Account)
- Set As Default: No
- Entity Node Setting: Entity Node Image, Entity Image
- Allowed Actions: * Appointment (Appointment)

On the right, there is an 'Entity Relationships' section with a dropdown for 'Relationship Type' and a 'Name' column header. Below this is a subgrid showing 'No data available'.

- Entity Relationships:** This allows the administrator to define which related records needs to be displayed on the Map My Relationships control/View. Create and Add Entity Relationships records from the subgrid of Entity Configuration record.

This screenshot shows the same 'Account - Pre Sales Process' entity configuration page, but with the 'Entity Relationships' subgrid open. The subgrid shows 'No data available' and a context menu is displayed over it. The context menu includes the following options:


- New Entity Relationship (highlighted with a red box)
- Refresh
- Run Report
- Excel Templates
- Export Entity Relationships
- See associated records

New Entity Relationship

General

Relationship Type * **One-to-many**

Relationship * --Select--

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

Child Configuration ---

Node Settings

Relationship Node Image **Entity Image**

Allowed Actions --Select--

View to show fields on Tooltip --Select--

Cluster Settings

Group By --Select--

Measure --Select--

Aggregate Type ---

- **Relationship Type:** Choose which type of relationship you want to add. Options are 'One-to-Many', 'Many-to-One' and 'Many-to-Many'.
- **Relationship:** Select the relationship from the list of relationship. This get filtered based on the option selected in the 'Relationship Type' field.
- **Relationship Node Image:** Choose image needs to displayed on the node of the primary entity record. Available options are, Entity Image, Record Image and Image URL.
 - ➔ **Entity Image:** The image of the entity that we see for the entity in the sitemap.
 - ➔ **Record Image:** The image of the record that we see on the record. If image is not present for record the Entity image will be displayed.
 - ➔ **Image URL:** A field will be visible upon selection of this option. Enter the external or internal image URL.
- **Allowed Actions:** A list of activities present in the system. Select multiple activities from the list. The selected activities will be available for the user to create activities against the related record.
- **View to show fields on Tooltip:** A list of fields of the related entity selected as a Relationship. Select multiple fields. The selected fields will be displayed as a tooltip on the nodes of the related records.

On hovering over the entity record in the relationship view, all those columns that belong to the selected view are shown as a tooltip:

View selected in the relationship configuration -

opportunity_invoices

Entity Relationship

General

Related

Node Settings

Relationship Node Image

Entity Image

Allowed Actions

× Appointment (Appointment)

×

▲▼

View to show fields on Tooltip

Active Invoices

×

▼

Columns present under ‘Active Invoices’ view –

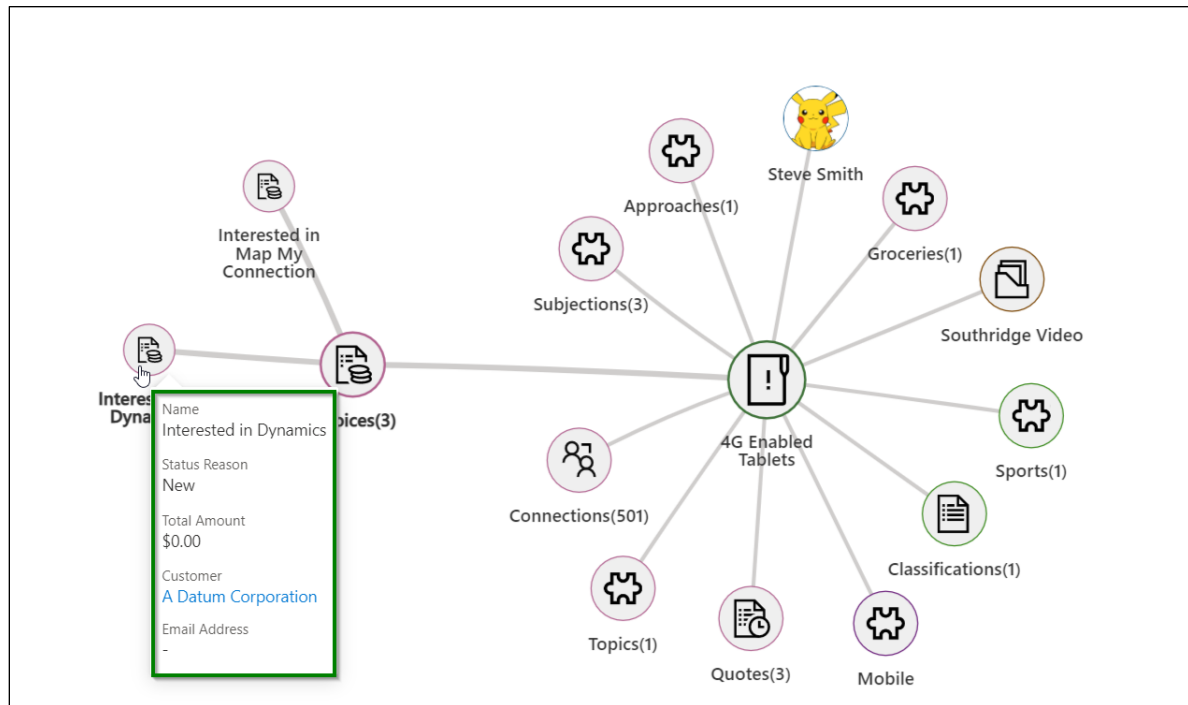
← Show Chart + New Delete Refresh Email a Link Flow Run Report Excel Templates Export to Excel

Active Invoices

Search this view

| ✓ Name | Status Reason | Total Amount | Customer | Email Address |
|---------------------------------|---------------|--------------|-----------------------------|---------------|
| Interested in Alerts4Dynamics | New | \$0.00 | Adventure Works Electronics | --- |
| Interested in Dynamics | New | \$0.00 | A Datum Corporation | --- |
| Interested in Map My Connection | New | \$0.00 | A Datum Corporation | --- |

Information shown on hovering over the respective entity record –



- **Child Configuration:** A list of Entity Configurations will be available. Select one such configuration to further drill down through the relationship and see associated entity records.
- **Group By:** A list of optionset type of fields of the related entity selected as a relationship. Select single field. The Map My Relationships view will group the records based on the selected field. Records can also be grouped by based on the selected attribute. For example:-
Enabling the grouping by gender code in relationship configuration:

contact_customer_accounts

Entity Relationship

Owner

12/28/2020 5:28 PM

Created On

General

Related

Node Settings

Relationship Node Image

Entity Image

Allowed Actions

--Select--

View to show fields on Tooltip

--Select--

Cluster Settings

Group By

Gender (gendercode)

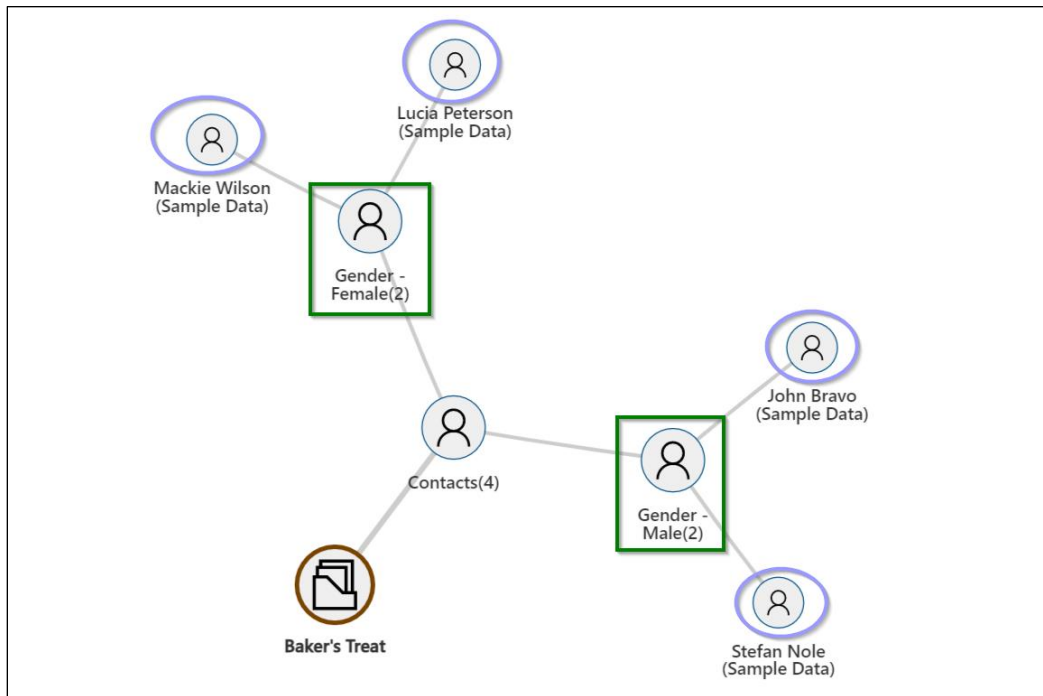
Measure

Credit Limit (creditlimit)

Aggregate Type

SUM

This is how it looks in the relationship view (It is grouped based on Gender):



- **Measure and Aggregate Type:** A list of fields of the related entity. Select a field, the selected field will be displayed as a tooltip of the grouped node with aggregation. This will measure the selected field in the relationship configuration and calculate the value based on the option chosen as an aggregate type

Let's consider, there are total 4 contacts with the credit limit values as below:

Contact 1 (Female) – Rs. 1,000


Contact 2 (Female) – Rs. 1,500

Contact 3 (Male) – Rs. 500

Contact 4 (Male) – Rs. 2,000

Let's set the values to **'Measure'** and **'Aggregate Type'** in the relationship configuration as shown below –

contact_customer_accounts
 Entity Relationship

 12/28/2020 5:28 PM
 Created On

General Related

Relationship

contact_customer_accounts(contact)
 x

Child Configuration

Node Settings

Relationship Node Image
 Entity Image

Allowed Actions
 --Select--

View to show fields on Tooltip
 --Select--

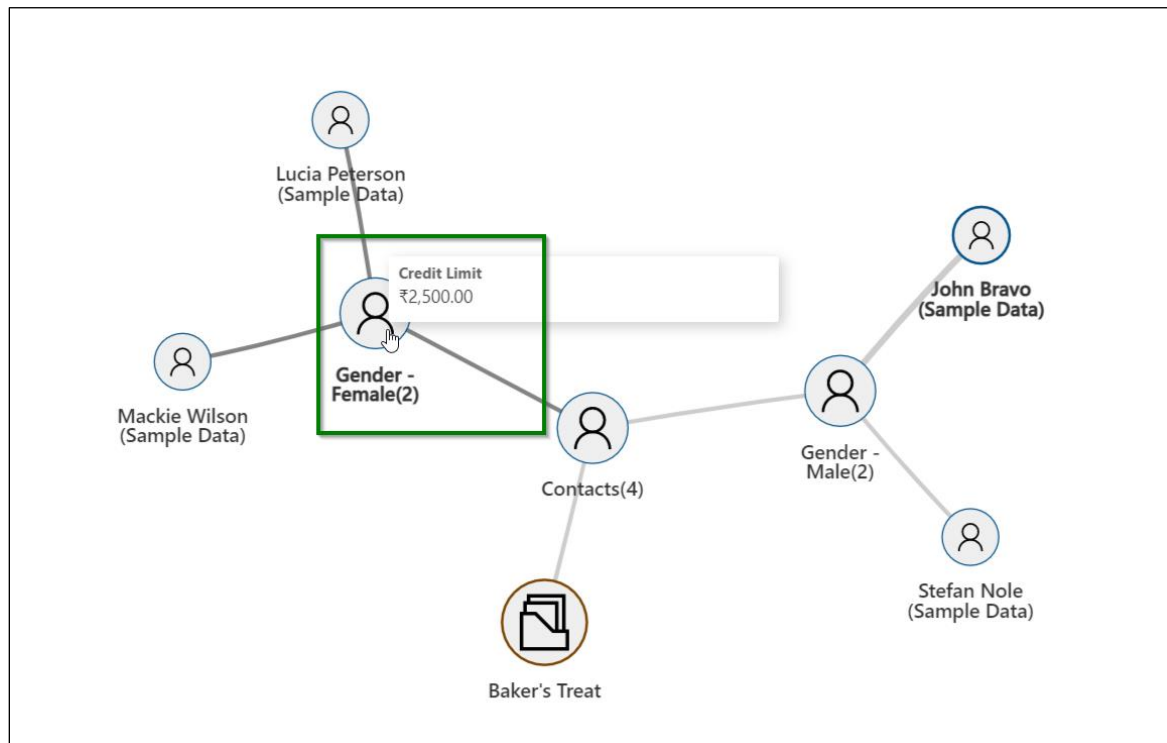
Cluster Settings

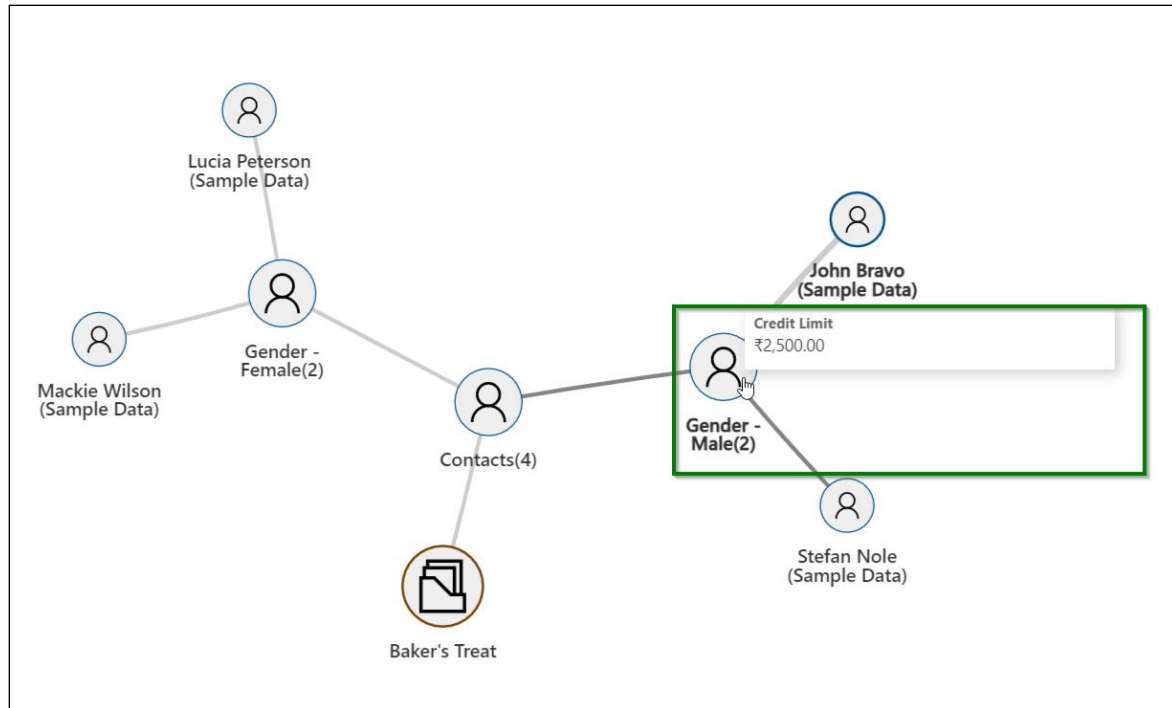
Group By
 Gender (gendercode)
 x

Measure
 Credit Limit (creditlimit)
 x

Aggregate Type
 SUM

On hovering over the group node, it will show the calculated value of Credit limit as a sum.





- 3. Use advanced configuration:** Once the Entity Configuration and Entity Relationship entity records has been created, perform the steps to add Map My Relationships control on the form. **Steps from 'Map My Relationships Basic Configuration' section.**

We can use either basic configuration or advanced configuration. If you want to use advanced configuration then enter the name of the Entity Configuration record name in the 'Map My Relationships Control Configuration' property. Save and publish the customization.

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"/> × |

[Add Control...](#)

Map My Relationships Control

| Property | Value |
|---------------------------------|---|
| Field * | new_mapmyrelationships |
| Map My Relationship Control ... | Account - Pre Sales Process (SingleLine.... |
| One to Many Relationships | Account_Emails, Account_PhoneCalls (Si... |
| Many to One Relationships | account_originating_lead, account_prim... |
| Many to Many Relationships | |

Map My Relationship Control Configuration
Compatible types: SingleLine.Text, SingleLine.TextArea, Multiple
Either provide MapMyRelationship configuration or fill in the details. If specified then control will use parameters/configuration defined in the Entity Configuration record.

☐ Hide Default Control

Drill down through relationships:

The way ‘**Drill down**’ feature behaves with connection relationships is a little different than how it works with other entities within CRM.

In general, this feature allows user to drill through the relationship N-level further down and see its associated entity records. Going ahead, we will straight look into the configuration steps to be followed all through the whole process towards the below outlined business use case.

Let’s consider a scenario where user wants to see the associated contact connection record of a particular account in CRM and further drill the connection down to see its few other associated account records.

Let’s complete the entity and relationship configurations progressively to achieve the above requirement.

Before we begin, we will have to keep these pre-requisites in mind:

- An account record should exist in the CRM system having at least one associated contact connection further holding a few associated account records.
- Map My Relationship view control must already be configured for an account entity. For more information on how to configure this, please follow the steps explained [here](#).

- 1) Firstly, navigate to **Map My Relationship → Entity Configuration → New**.
- 2) Create and save the entity configuration as shown below:

Entity configuration:

- **Name:** Give a valid name for configuration.
- **Entity:** Account (as we want to see the connection record of an account).
- **Set As Default:** Can be ignored for this occasion since this field won’t play any role here in this scenario because this is not going to be used as a child configuration.
- **Entity Node Image:** Set an image as per requirement.
- **Allowed Actions:** Set quick activity actions as required.

Account Child Connection

Entity Configuration

General

Related

Name
*
Account Child Connection

Entity
*

Account (Account) x

Set As Default
No

Entity Node Setting

Entity Node Image
Entity Image

Allowed Actions

x Appointment (Appointment)
x

Relationship configuration:

- **Relationship Type:** One to Many (Account holding one to many relationship with connections).
- **Relationship:** account_connections1(connection).
- **Relationship Node Image:** As required.
- **Allowed Actions:** As required.
- **View to show fields on Tooltip:** Active Connections.
- **Use Default Configuration:** Yes (Another entity configuration for **'Contact'** will also be created to see further associated records of contact connection record).

Map My Relationships – User Manual

account_connections1
Entity Relationship

Chris Lewis
Owner

General Related

Relationship Type * **One-to-many**

Relationship *

Entity Configuration * **Account Child Connection**

Use Default Configuration **Yes**

Node Settings

Relationship Node Image **Entity Image**

Allowed Actions

View to show fields on Tooltip

Cluster Settings

Group By

Measure

Account Child Connection
Entity Configuration

Chris Lewis
Owner

12/4/2020 10:31 AM
Created On

General Related

Name * **Account Child Connection**

Entity *

Set As Default **No**

Entity Node Setting

Entity Node Image **Entity Image**

Allowed Actions

Entity Relationships

| Relationship Type | Name | Entity Configuration | Created On |
|-------------------|----------------------|--------------------------|------------|
| One-to-many | account_connections1 | Account Child Connection | 12/4/2020 |

3) Next, let's create another entity configuration for '**Contact**' to see further associated account records of the contact connection, and set it to default as '**Yes**' as shown below:

Entity configuration:

- **Name:** Give a valid name for configuration.
- **Entity:** Contact
- **Set As Default:** Yes (Here, we need to set this as 'Yes' which is already enabled in the connection relationship configuration that we have configured earlier above).
- **Entity Node Image:** As required.
- **Allowed Actions:** As required.

Associated account records of contact connection

Entity Configuration

General

Related

Name
*
Associated account records of contact connection

Entity
*
Contact (Contact)
x

Set As Default
Yes

Entity Node Setting

Entity Node Image
Entity Image

Allowed Actions
--Select--

Relationship configuration:

- **Relationship Type:** One to Many.
- **Relationship Type:** account_primary_contact(account).
- **Relationship Node Image:** As required.
- **Allowed Actions:** As required.
- **View to show fields on Tooltip:** My Active Accounts.
- **Child Configuration:** Leave this blank since we don't want to see any further associated entity records of the account(s).

Map My Relationships – User Manual

account_primary_contact
Entity Relationship

Owner | 12/5/2020 9:55 AM
Created On

General Related

Relationship Type * **One-to-many**

Relationship * **account_primary_contact(account)**

Entity Configuration * **Associated account records of contact connection**

Child Configuration ---

Node Settings
Relationship Node Image
Entity Image

Allowed Actions **x Appointment (Appointment)**

View to show fields on Tooltip **My Active Accounts**

Cluster Settings
Group By --Select--

Measure --Select--

Aggregate Type ---

Associated account records of contact connection
Entity Configuration

Owner | 12/4/2020 12:25 PM
Created On

General Related

Name * **Associated account records of contact connection**

Entity * **Contact (Contact)**

Set As Default **Yes**

Entity Node Setting
Entity Node Image
Entity Image

Allowed Actions --Select--

Entity Relationships

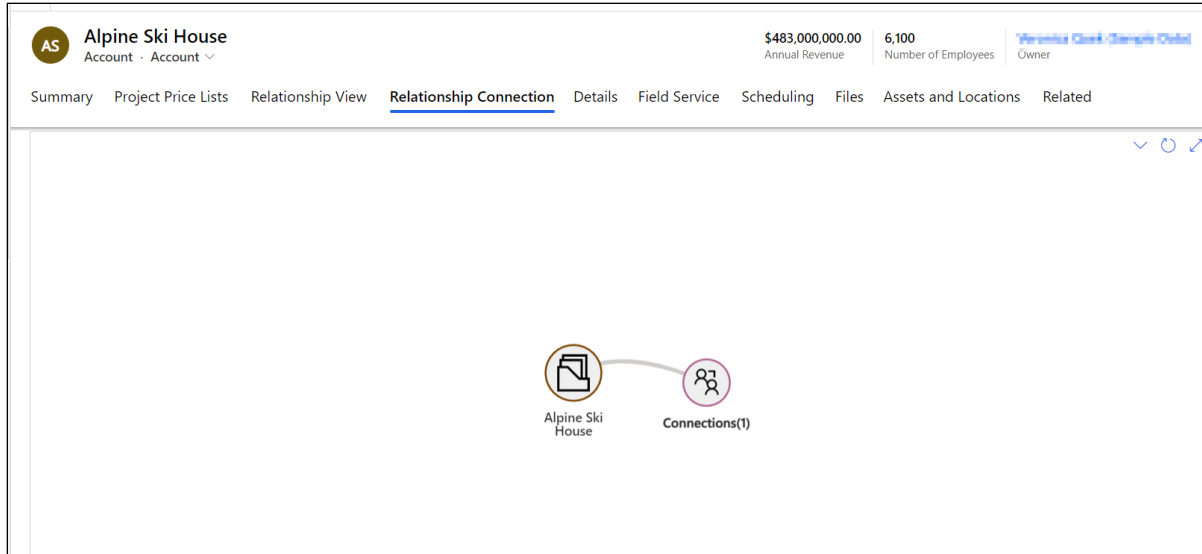
Relationship Type Name Entity Configuration Created On

One-to-many **account_primary_contact** **Associated account records c** **12/5/2020**

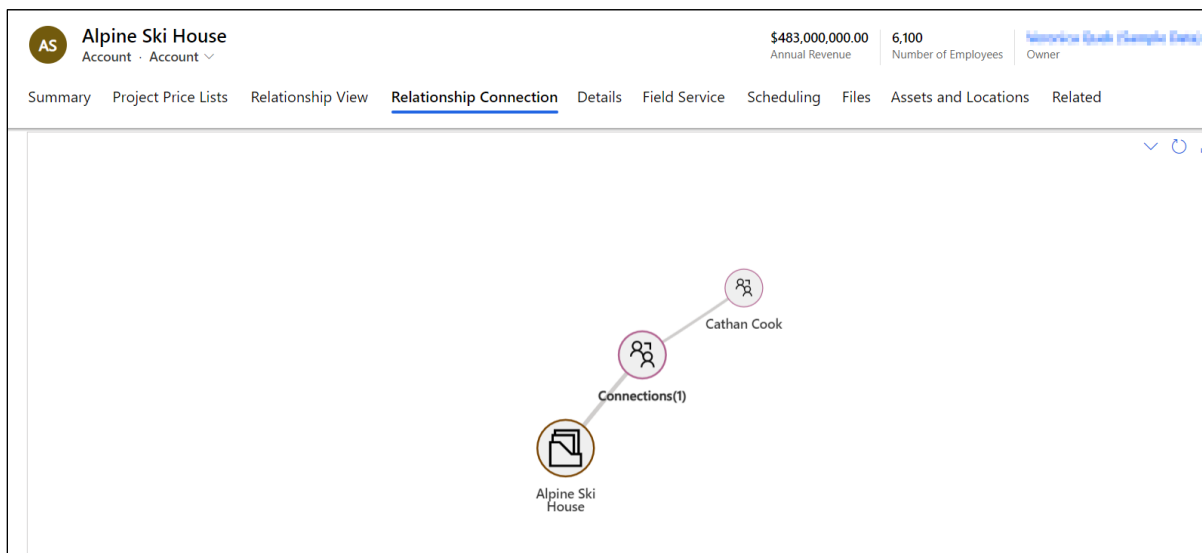
Note - At a time, application will accept only one entity configuration set as default to be used as a child configuration to see the associated entity records of the connection (associated account records of contact connection in this instance).

4) Now, navigate to **Account entity** → **Open a record** → **Click on 'Relationship Connection'**.

Map My Relationships – User Manual

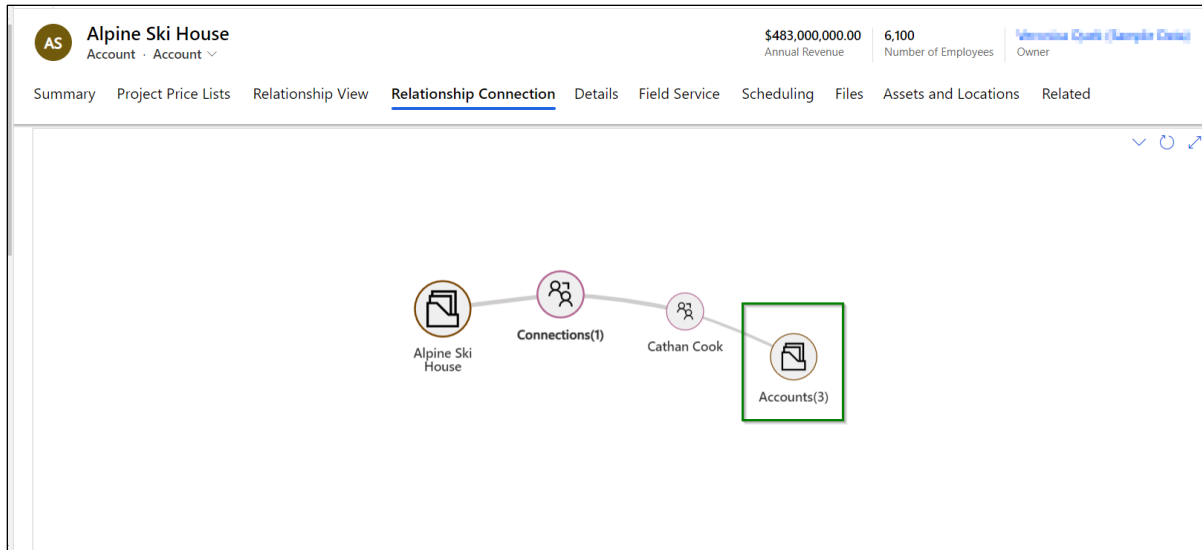


5) Double click on **'Connections'** to expand it and it will show a connection record.

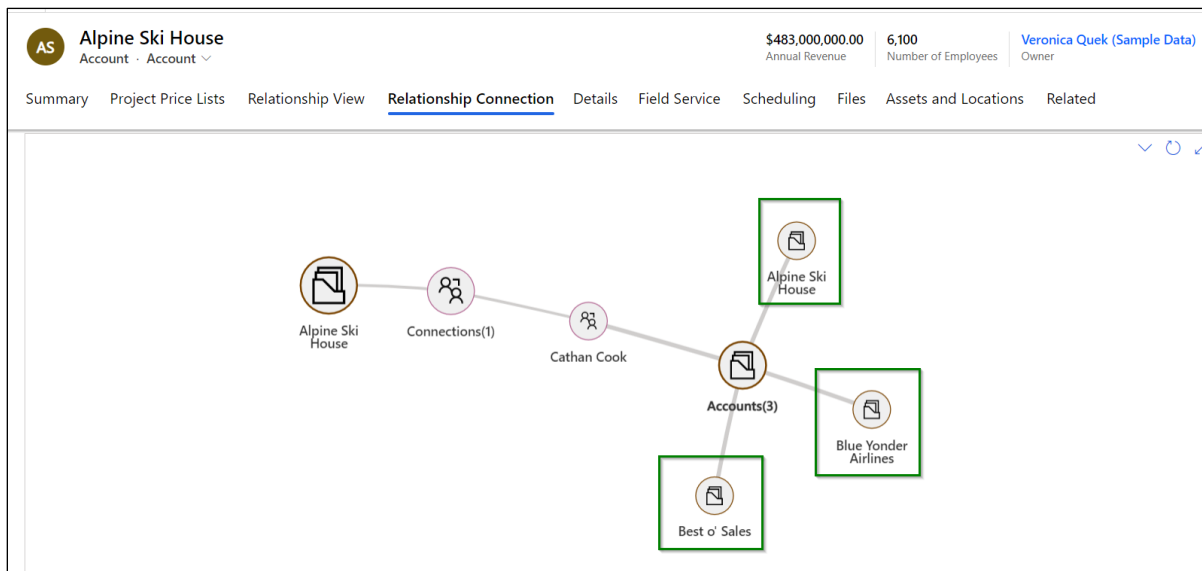


6) Now further expand (double click) contact record **'Cathan Cook'** and it will show you the association of accounts with the contact connection record.

Map My Relationships – User Manual



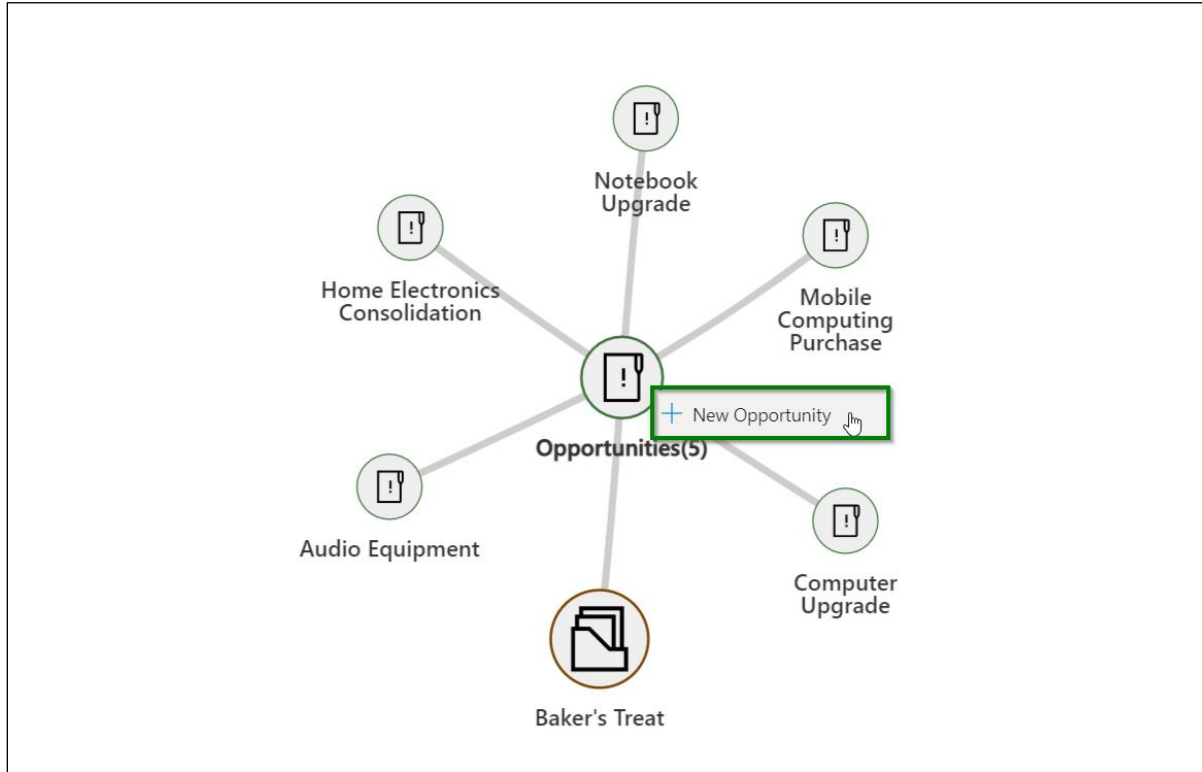
- 7) Again double click on **'Accounts'** to expand it and it will show the associated account records of the contact connection record **'Cathan Cook'**.



Using this approach, you will be able to drill down through the connection relationship to see its related entity records i. e. accounts in this illustration.

New entity record creation through relationship view

User is now provisioned to be able to quickly create a new entity record through the relationship view.



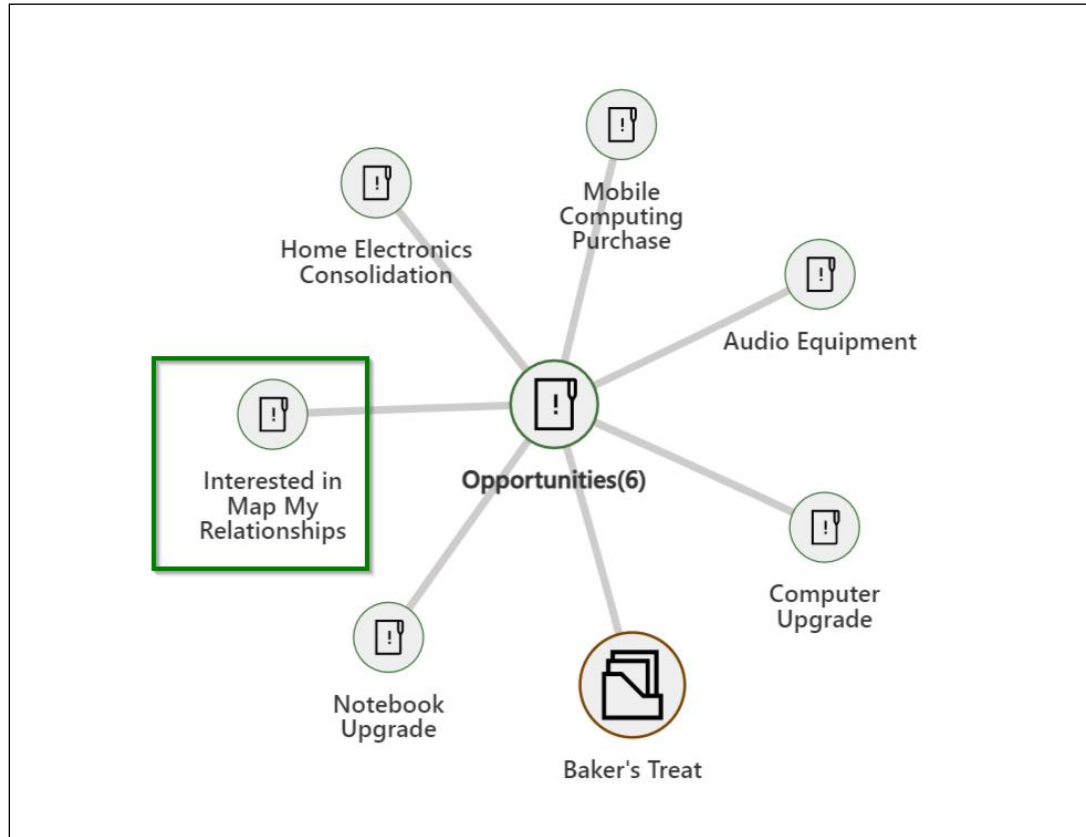
It will open up a quick create form.

The screenshot shows the 'Quick Create: Opportunity' form overlaid on the relationship view. The form has a title bar 'Quick Create: Opportunity' with a close button. Below the title bar is a 'Details' section with the following fields:

| | |
|------------------|--------------------------------------|
| Topic | * Interested in Map My Relationships |
| Order Type | * Item based |
| Contact | --- |
| Account | --- |
| Contracting Unit | * --- |
| Budget Amount | --- |
| Est. Revenue | --- |
| Est. Close Date | --- |
| Customer Need | --- |

At the bottom of the form are two buttons: 'Save and Close' and 'Cancel'.

After the record is created, the newly added record will start showing in the relationship view.



Map My Connections Control

As already described in the introduction of the manual, along with Map My Relationships, there is another provision wrapped up in the application that allows user to configure the connection control for a particular entity for which the user wishes to create, update and delete the connection record(s).

Parameters of Map My Connections control

Given below are the parameters of the connection control:

- 1) **Allowed Role Categories:** Allows user to state the role categories for which the user want to create a connection record. For example, Sales Team, Business, Family, etc.
- 2) **Allowed Entities:** Allows user to put the entities of user's choice to create a connection record of a chosen entity.
- 3) **Default Control:** Allows user to decide the default view of the connection control.

- 4) **Map My Relationships Control Configuration:** Allows user to enter a name of the Map My Relationships entity configuration in order to be able to see and create a connection record through relationship view.
- 5) **Allow to connect using Relationships map:** Allows user to be able to create a connection record by searching a record through the relationship view.

Components of Map My Connection control

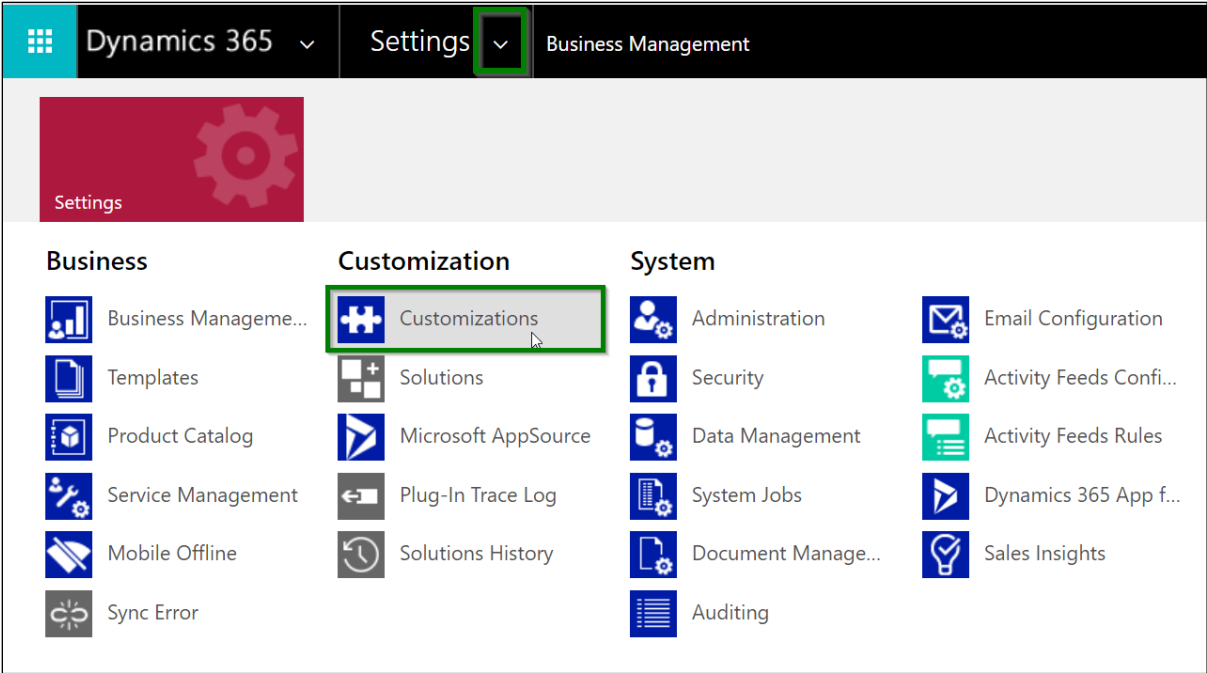
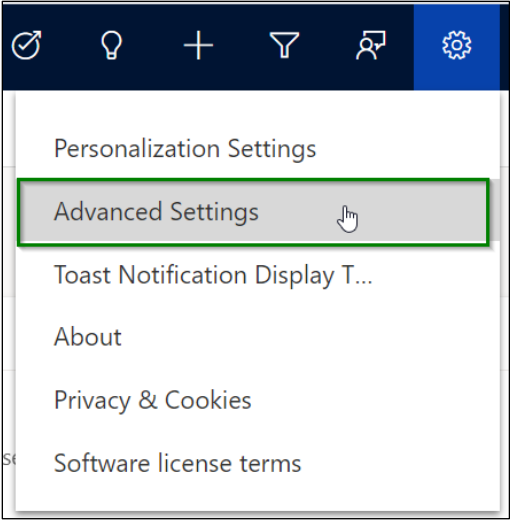
1. **Grid/Relationships View:** To allow user to see the data in grid as well as in relationship view.
2. **Expand relationship view:** To view the connection control in enlarged screen mode.
3. **Grid Refresh:** To refresh the connection control
4. **New connection creation:** These are the necessary fields to successfully create new connection -
 - a. **Role:** All those roles that fall under the selected role category will be listed under this drop-down.
 - b. **Select Entity:** The entities that user puts in while binding the connection control will be listed here.
 - c. **Selection Type:** This allows user to search a record either through a look up field or through relationship view.
 - d. **Selected Record:** Allows user to select a record for creating a connection.
 - e. **Description:** User can add any description for the connection record.
5. **Update connection** – allows user to update the connection with any of the above fields
6. **Delete connection** – allows user to delete the connection record easily

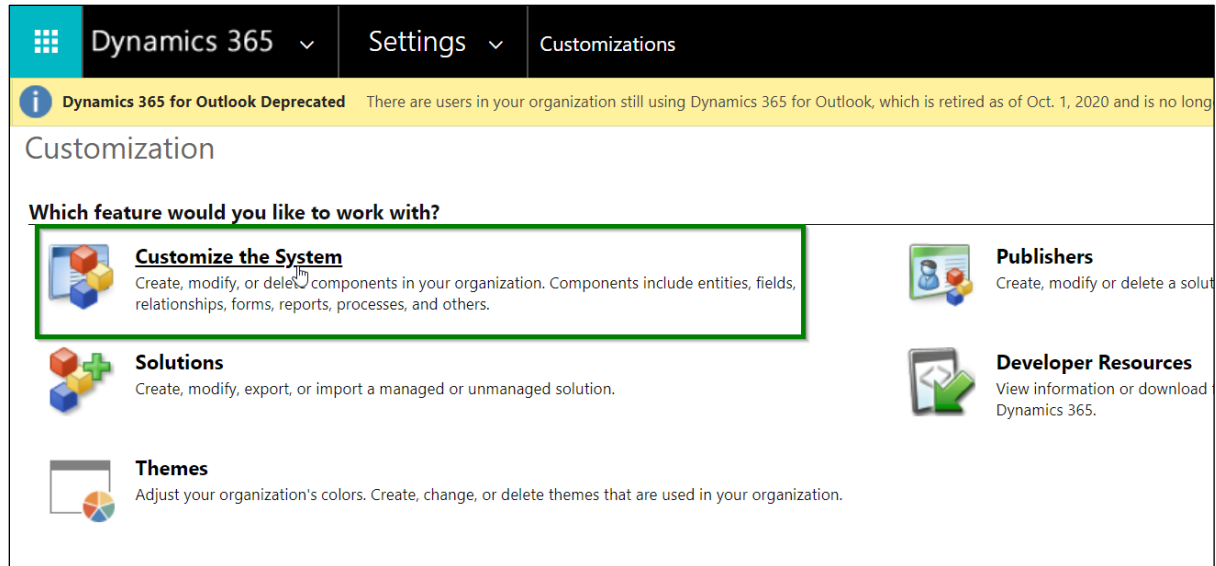
Steps to configure the connection control

Consider a scenario where user wants to connect a few records to the Opportunity entity record.

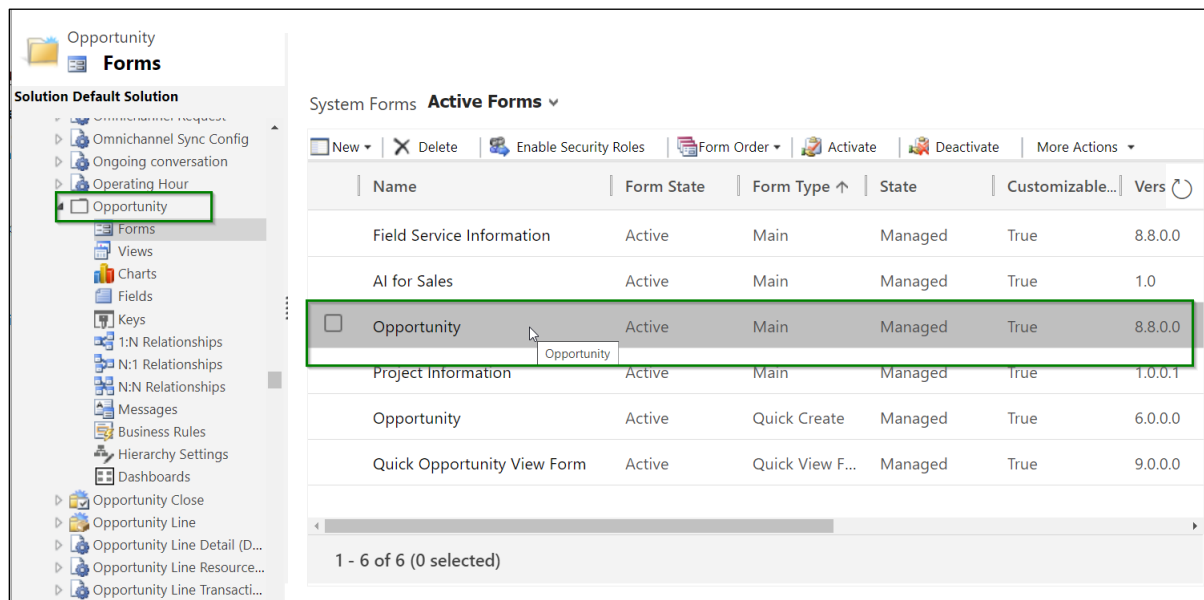
For this, first we will start with configuring the connection control for the **Opportunity** entity.

- 1) Go to **Advanced Settings → Settings → Customizations → Customize the System.**

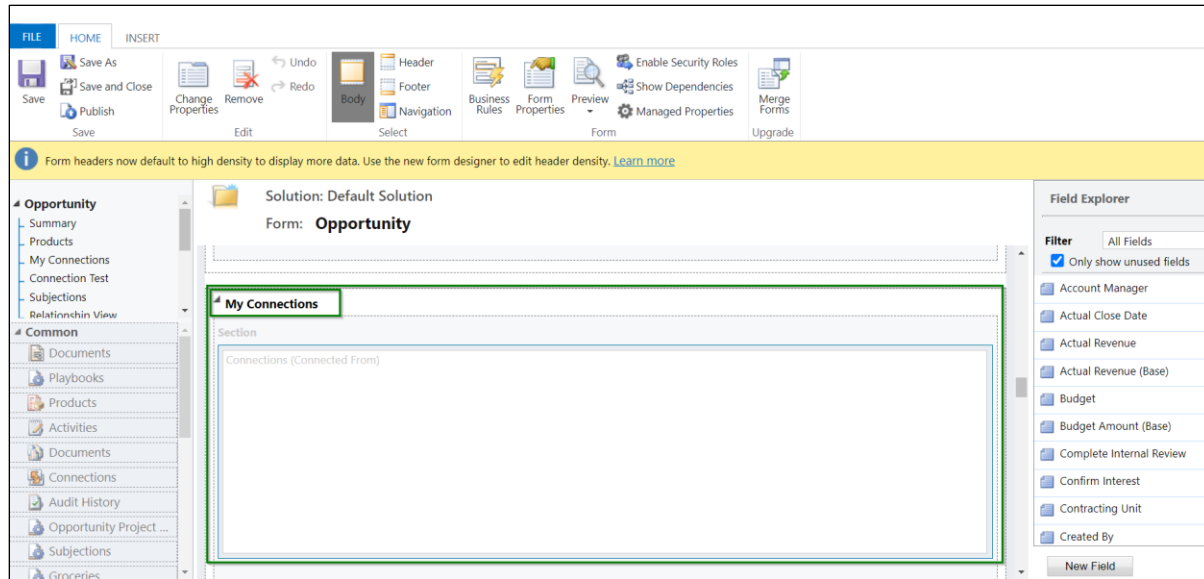




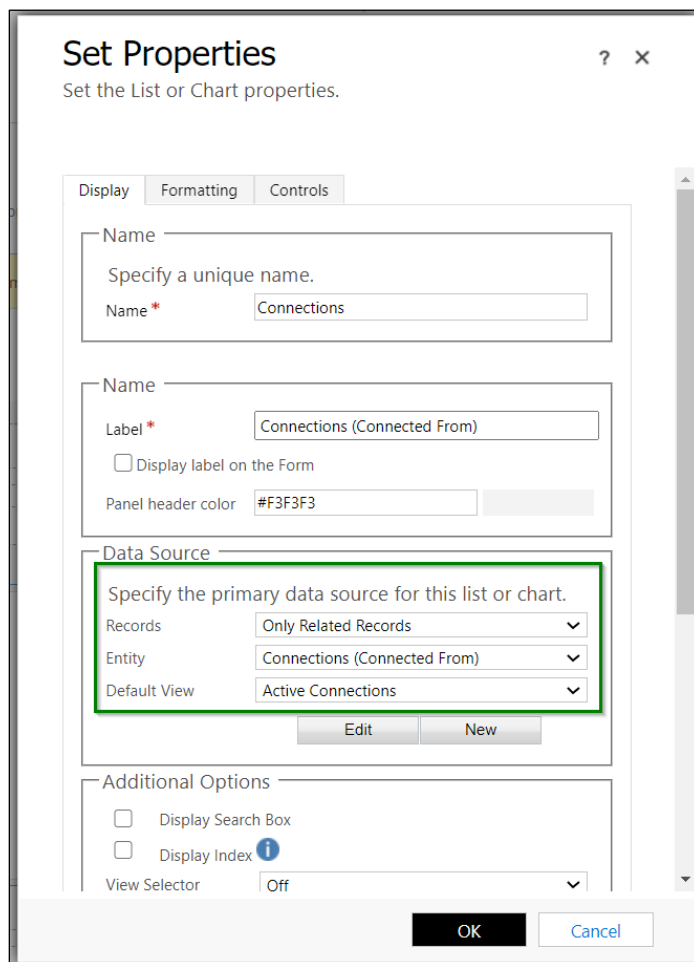
2) Next, under 'Default Solution' select **Opportunity** → **Forms** → **Main Form**.



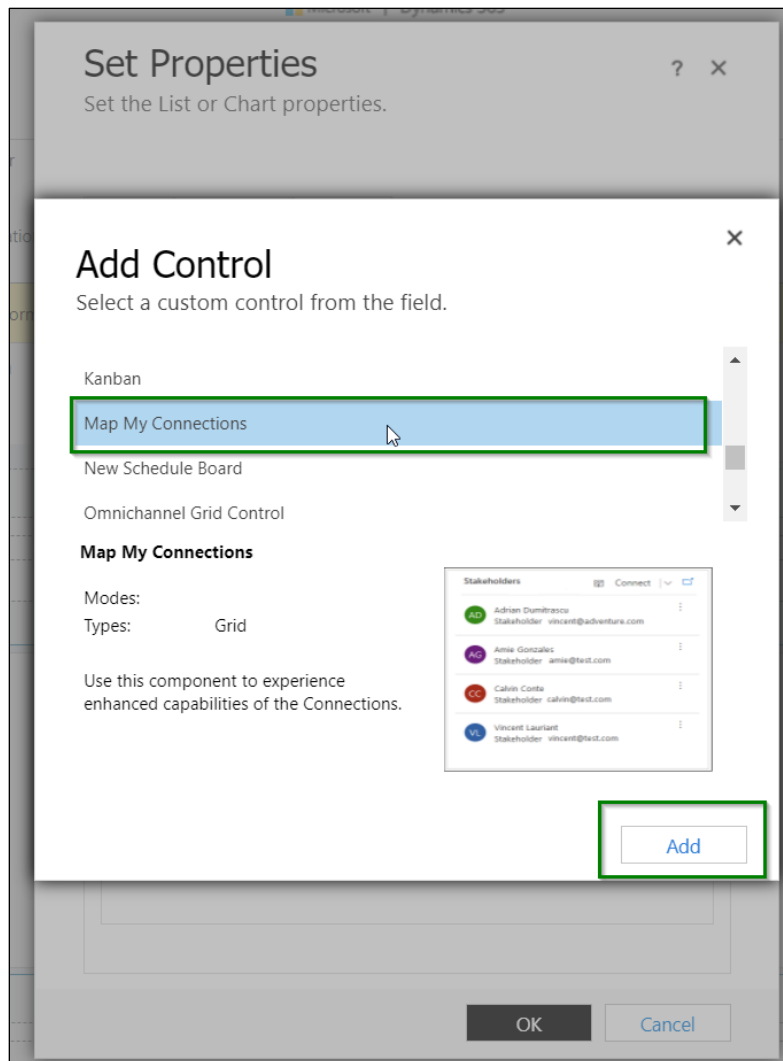
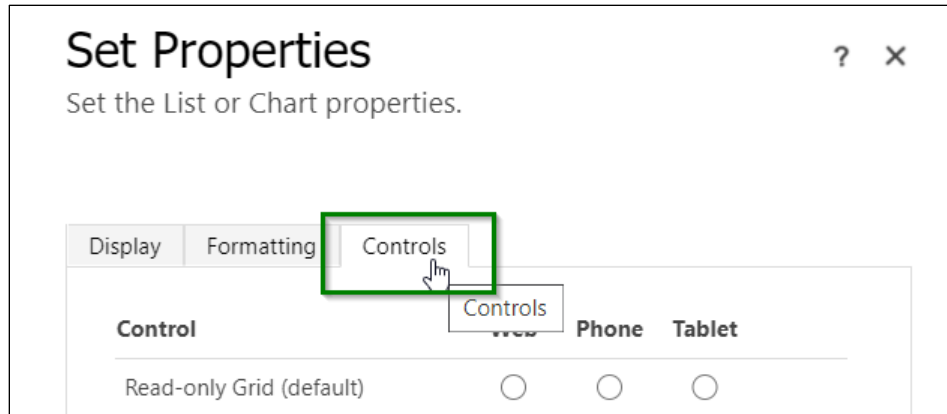
3) Now add a **sub-grid** on the form (You can add a sub-grid with one column for a better view).



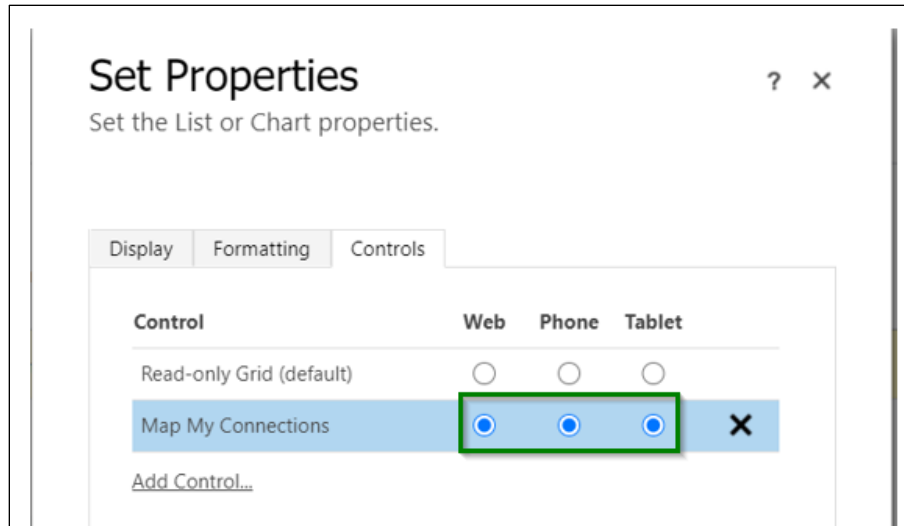
4) Set the properties of sub-grid as shown below:



5) Now go to 'Controls' and add 'Map My Connections' control.



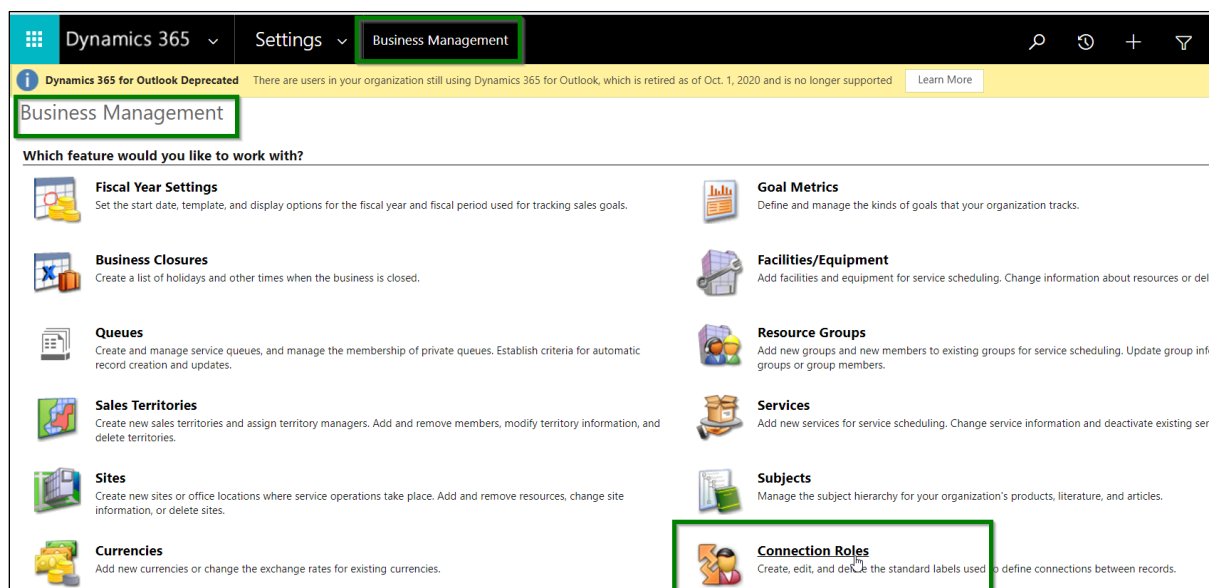
6) Enable the control so that you can see it on all three: **Web, Phone and Tablet**.



7) Next, let's set the parameters for the control.

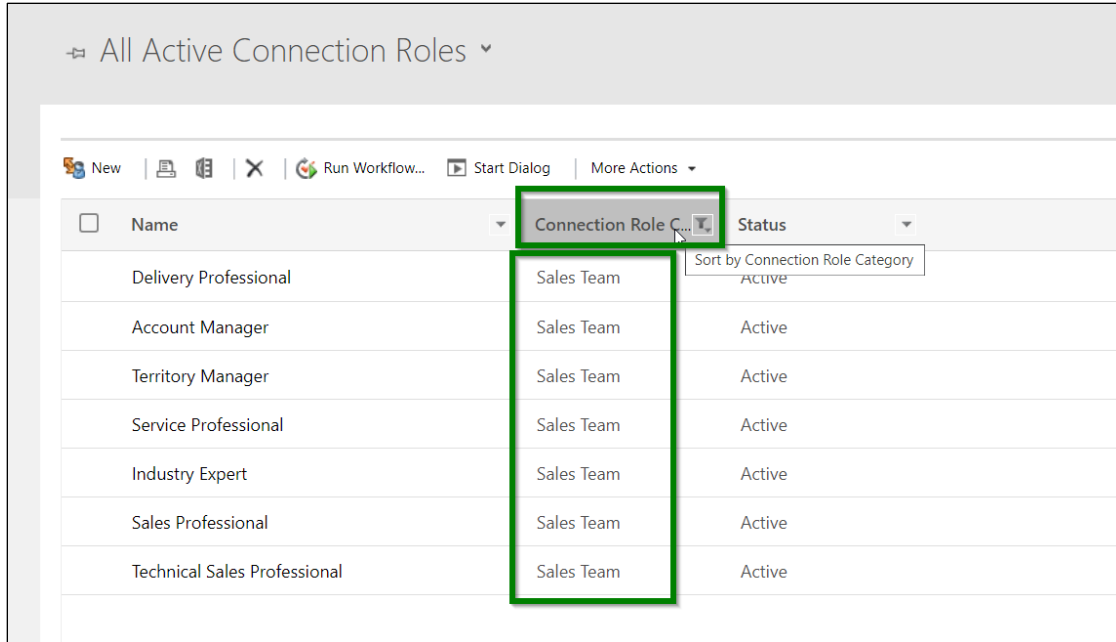
Allowed Role Categories: Here, you will have to manually enter the role categories for which you want to create a connection of. For example, if you put 'Sales Team', it will show you 'Sales Team' category under 'Connect' option with its further connection roles later on when you are creating a connection for an opportunity through connection control.

Note – These are the categories that you could find through the connection roles in business management.



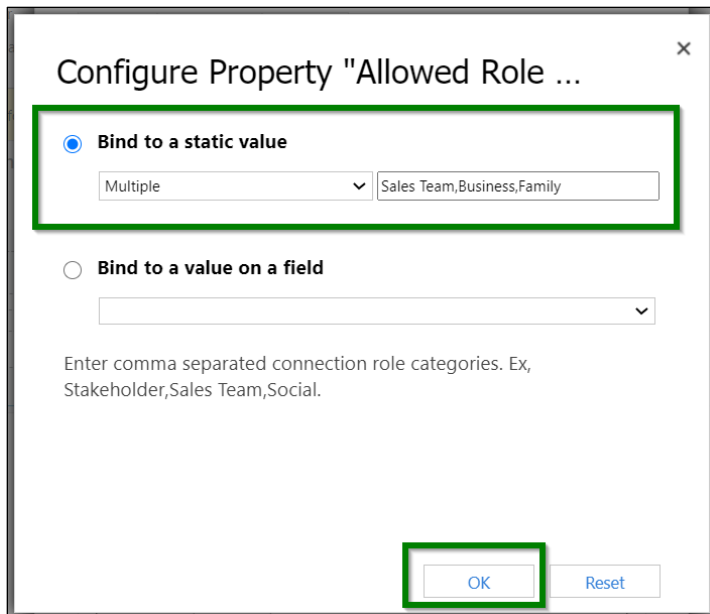
You can further sort it by category.

Map My Relationships – User Manual



| Name | Connection Role Category | Status |
|------------------------------|--------------------------|--------|
| Delivery Professional | Sales Team | Active |
| Account Manager | Sales Team | Active |
| Territory Manager | Sales Team | Active |
| Service Professional | Sales Team | Active |
| Industry Expert | Sales Team | Active |
| Sales Professional | Sales Team | Active |
| Technical Sales Professional | Sales Team | Active |

In this instance, we will put the categories as - **Sales Team,Business,Family** (do not add any space in between the commas “,” as the configuration is likely to crash because of that).



Configure Property "Allowed Role ...

☒ Bind to a static value

Multiple

☐ Bind to a value on a field

Enter comma separated connection role categories. Ex, Stakeholder,Sales Team,Social.

OK Reset

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"/> X |

[Add Control...](#)

Map My Connections

| Property | Value |
|--------------------------------|----------------------------------|
| Dataset_Display_Key | Active Connections |
| Allowed Role Categories | Sales Team,Business,Family (...) |
| Allowed Entities | account (Multiple) |
| Default Control | 0 (SingleLine.Text) |
| Map My Relationship ... | Opportunity (SingleLine.Text) |

Allowed Role Categories
Compatible types: Multiple
Enter comma separated connection role categories. Ex, Stakeholder,Sales Team,Social.

OK Cancel

Allowed Entities: The entities that you put here will list out under **'Select Entity'** on the **'Create Connection'** form while adding a connection to the opportunity. This will allow user to connect the record of only these mentioned entities to the opportunity. You will need to make sure to enter the logical name of an entity into the field.

You can see the logical name of an entity here -

Map My Relationships – User Manual

The screenshot shows the 'Entity Definition' configuration window. The 'Name' field is highlighted with a green box and contains the value 'account'. Other fields include 'Display Name' (Account), 'Plural Name' (Accounts), 'Primary Image' (Default Image), 'Color' (#794300), and 'Description' (Business that represents a customer or potential customer. The company that is billed in business transactions.). The 'Areas that display this entity' section has checkboxes for Sales, Settings, Service, Marketing, and Training. The 'Process' section is also visible.

Here, we will enter 'account' entity.

The screenshot shows the 'Configure Property "Allowed Entiti...' dialog box. The 'Bind to a static value' option is selected. The 'Multiple' dropdown is set to 'account'. The 'OK' button is highlighted with a green box. The dialog also includes a 'Bind to a value on a field' option and a text input field for entering comma-separated logical names of entities.

Set Properties ? x

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"/> X |

[Add Control...](#)

Map My Connections

| Property | Value |
|--------------------------|----------------------------------|
| 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) |

Allowed Entities
Compatible types: Multiple
Enter comma separated logical name of entities. Ex,
account,contact,systemuser.

OK Cancel

Default Control: You will need to set this field as either **0** or **1**.

0 = Default view would be '**Grid**' view.

1 = Default view would be '**Relationship**' view.

Here, we will set this as **0**.

Configure Property "Default Control" ✕

☒ **Bind to a static value**

SingleLine.Text

0

☐ **Bind to a value on a field**

Enter either 0 or 1. 0 = Grid view and 1 = Relationship view.

OK

Reset

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

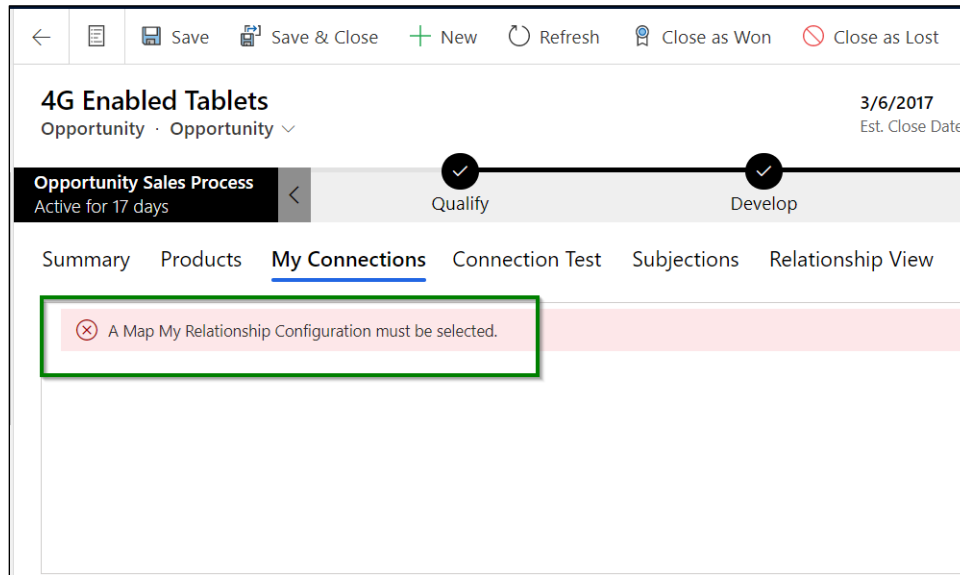
| Property | Value |
|--------------------------|----------------------------------|
| Dataset_Display_Key | Active Connections |
| Allowed Role Categori... | Sales Team,Business,Family (...) |
| Allowed Entities | account (Multiple) |
| Default Control | 0 (SingleLine.Text) |
| Map My Relationship ... | Opportunity (SingleLine.Text) |

Default Control
Compatible types: SingleLine.Text
Enter either 0 or 1. 0 = Grid view and 1 = Relationship view.

OK

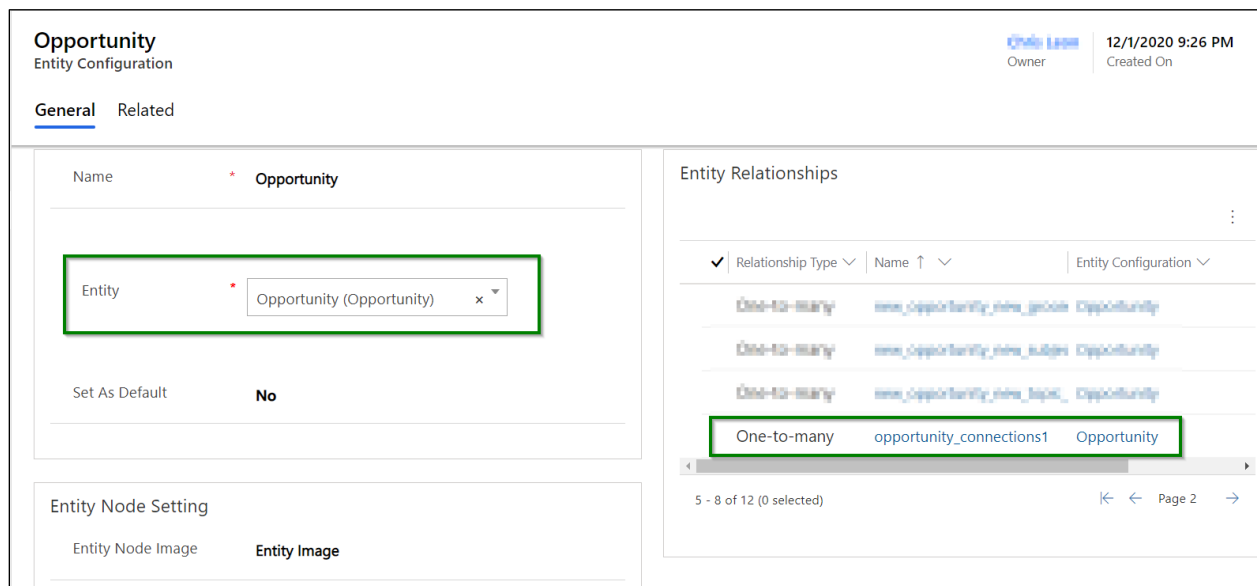
Cancel

Map My Relationship Control Configuration: It is mandatory for user to enter the name of Map My Relationship configuration if the user wishes to see the connections in the **relationship view** through the connection control. So, despite having the Map My Relationship configuration in the system, it will show you the below error if you try to see the relationship view of connections **without** entering a name of Map My Relationship configuration.



Considering that the below Map My Relationship configuration is present in the system, let's enter its name while configuring the connection control.

Entity configuration:–



Relationship configuration:–

opportunity_connections1
Entity Relationship

Owner: Chris Lippert | Created On: 12/1/2020 9:26 PM

General | Related

Relationship Type * **One-to-many**

Relationship * opportunity_connections1(con... x

Entity Configuration * **Opportunity**

Use Default Configuration **Yes**

Node Settings

Allowed Actions x Appointment (Appointment)

View to show fields on Tooltip Active Connections x

Cluster Settings

Group By Type (To) (record2objecttypepec... x

Measure --Select--

Let's enter the name of entity configuration into 'Map My Relationship Control Configuration' field.

Configure Property "Map My Relati..."

☒ **Bind to a static value**

SingleLine.Text ▼ Opportunity

☐ **Bind to a value on a field**

Enter name of the Map My Relationships Configuration entity record.

OK Reset

Set Properties ? x

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"/> x |

[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) |

Map My Relationship Control Configuration
Compatible types: SingleLine.Text
Enter name of the Map My Relationships Configuration entity record.

OK Cancel

Allow to connect using Relationships Map: This parameter decides whether user can search for a record through the relationships view for adding a connection. You will have to set either **0** or **1** to this field.

0 = 'Relationship View' option would be available under '**Selection Type**' (User would be able to pick a record through relationship view).

1 = 'Relationship View' option will **not be** available under '**Selection Type**' (User won't be able to search for a record through the relationship view).

Considering, we have the Map My Relationship configuration as shown below:

Entity configuration:-

Opportunity

Entity Configuration

Owner 12/1/2020 9:26 PM Created On

General Related

Name * Opportunity

Entity * Opportunity (Opportunity) x

Set As Default No

Entity Node Setting

Entity Node Image Entity Image

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) Page 1

Few more relationships:-

Entity Relationships

Relationship Type Name Entity Configuration

| | | |
|-------------|----------------------------|-------------|
| One-to-many | new_opportunity_new_groce | Opportunity |
| One-to-many | new_opportunity_new_subjec | Opportunity |
| One-to-many | new_opportunity_new_topic_ | Opportunity |
| One-to-many | opportunity_connections1 | Opportunity |

5 - 8 of 12 (0 selected) Page 2

Further few relationships:-

| Entity Relationships | | |
|---------------------------|------------------------------|------------------------|
| | | |
| ✓ Relationship Type ▾ | Name ↑ ▾ | Entity Configuration ▾ |
| Many-to-one | opportunity_customer_accou | Opportunity |
| One-to-many | opportunity_invoices | Opportunity |
| Many-to-one | opportunity_parent_contact.. | Opportunity |
| One-to-many | opportunity_quotes | Opportunity |
| 9 - 12 of 12 (0 selected) | | |

Let's set the value as '0' for 'Allow to connect using Relationships Map'.

Configure Property "Allow to conn..."

☒ **Bind to a static value**

SingleLine.Text ▾ 0

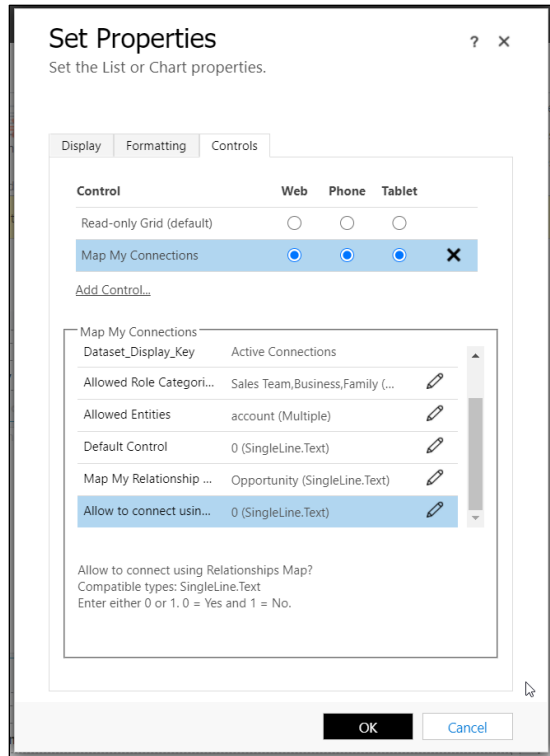
☐ **Bind to a value on a field**

▾

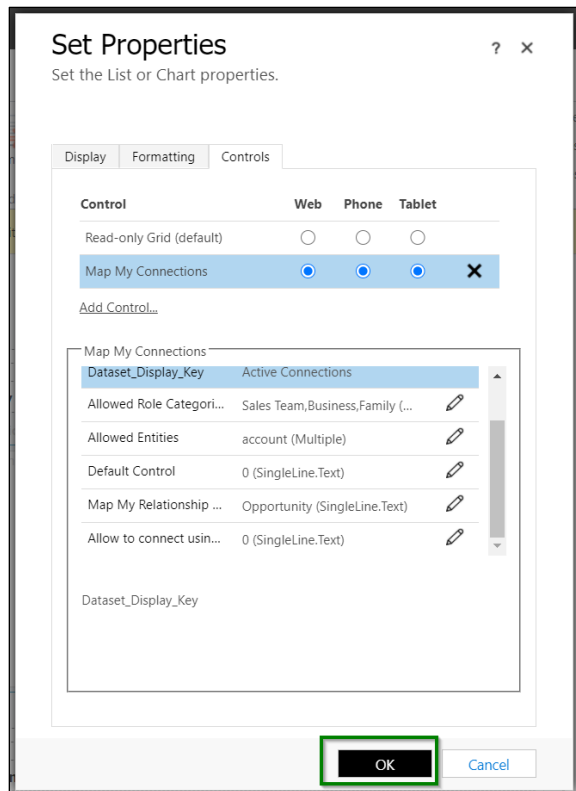
Enter either 0 or 1. 0 = Yes and 1 = No.

OK

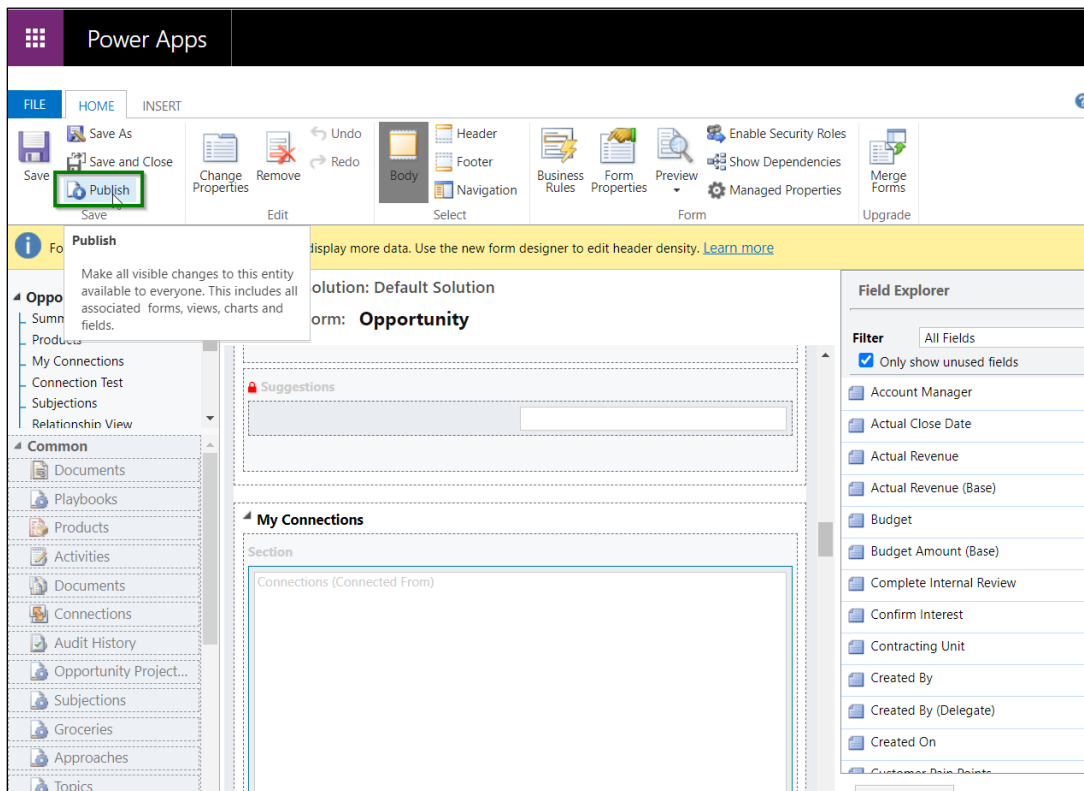
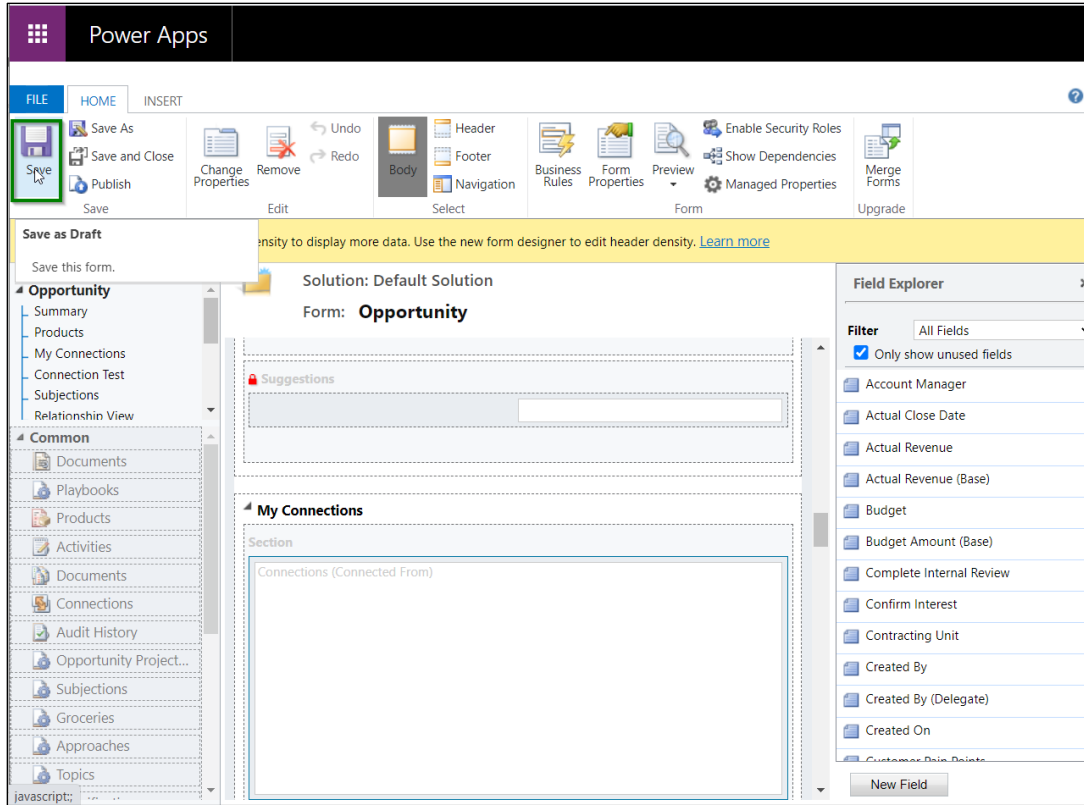
Reset



- 8) Once done with setting up all the required parameters for the connection control, let's **save and publish** these customizations.



Map My Relationships – User Manual



9) Now, go back to **Opportunity** record.

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

Topic*
4G Enabled Tablets

Contact
Steve Smith

Account
Southridge Video

Purchase Timeframe
This Quarter

Currency*

Timeline

Search timeline

Enter a note...

CL Task modified by Chris Leon
Dynamics Invoice Task
Active 11/30/2020 1:07 PM ▾

SL Task completed by Spencer Low (Sample Data)
Send Email
Follow up with relevant products
Closed 11/23/2020 8:49 AM ▾

Assistant

No notifications
Check back later to see new notifications

Stakeholders

Let's say this opportunity has some connection records already.

4G Enabled Tablets
Opportunity · Opportunity ▾

3/6/2017 Est. Close Date

Opportunity Sales Process Active for 17 days ▾

Qualify Develop **Propose**

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

Show Chart Connect ▾ Refresh Run Report ▾ Excel Templates ▾ Export Connections ▾

Active Connection Associated View ▾

| Connected To ↑ ▾ | Role (To) ▾ | Description ▾ |
|---------------------|--------------------|---------------|
| A Datum Corporation | Sales Professional | |
| Adventure Works | MMC | |
| Alex Simmons | Sales Professional | --- |
| Allison Brown | Sales Professional | --- |

10) Now navigate to the connection control which we configured earlier above through the customizations. The connection records will show in the grid.

Map My Relationships – User Manual





4G Enabled Tablets
Opportunity · Opportunity ▾

3/6/2017 Est. Close Date \$3,257,500.00 Est. Revenue In Progress Status Spencer Low (Sample Data) Owner

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 |

11) You can also switch this to relationship view.

4G Enabled Tablets
Opportunity · Opportunity ▾

3/6/2017 Est. Close Date \$3,257,500.00 Est. Revenue In Progress Status Spencer Low (Sample Data) Owner





Opportunity Sales Process Active for 17 days ▾

Qualify Develop **Propose (17 D)** Close

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

Relationships View

Connect ▾

| 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 |

12) It will show you the connection records in relationship view format. Switching it back to grid view will show you these connection records in grid format, this is how user can change between these two views. Here, you are seeing the records are individually categorized in **'Account'** and **'Contact'**, this is because we have grouped it by **'Type (To)'** under cluster settings in the entity configuration.

Map My Relationships – User Manual

←

Save

Save & Close

+ New

Deactivate

Delete

Refresh

Export to PDF

Assign

Share

Email a Link

⋮

Opportunity
Entity Configuration

Chris Lerner
Owner

12/1/2020 9:26 PM
Created On

✓

General

Related

Entity

Opportunity (Opportunity)

×

▼

Set As Default

No

Entity Node Setting

Entity Node Image

Entity Image

Allowed Actions

×

Appointment (Appointment)

×

▲

▼

Relationship Type

One-to-many

Name

Entity Configuration

One-to-many

see_opportunity_new_gross_opportunity

One-to-many

see_opportunity_new_subject_opportunity

One-to-many

see_opportunity_new_topic_opportunity

One-to-many

opportunity_connections1

Opportunity

5 - 8 of 12 (0 selected)

←

←

Page 2

→

←

Save

Save & Close

+ New

Deactivate

Delete

Refresh

Export to PDF

Assign

Share

Email a Link

⋮

opportunity_connections1
Entity Relationship

Chris Lerner
Owner

12/1/2020 9:26 PM
Created On

✓

General

Related

Relationship Type

One-to-many

Relationship

opportunity_connections1(connection)

×

▼

Entity Configuration

Opportunity

Use Default Configuration

Yes

Node Settings

Relationship Node Image

Entity Image

Allowed Actions

×

Appointment (Appointment)

×

▲

▼

View to show fields on Tooltip

Active Connections

×

▼

Cluster Settings

Group By

Type (To) (record2objecttypecode)

×

▼

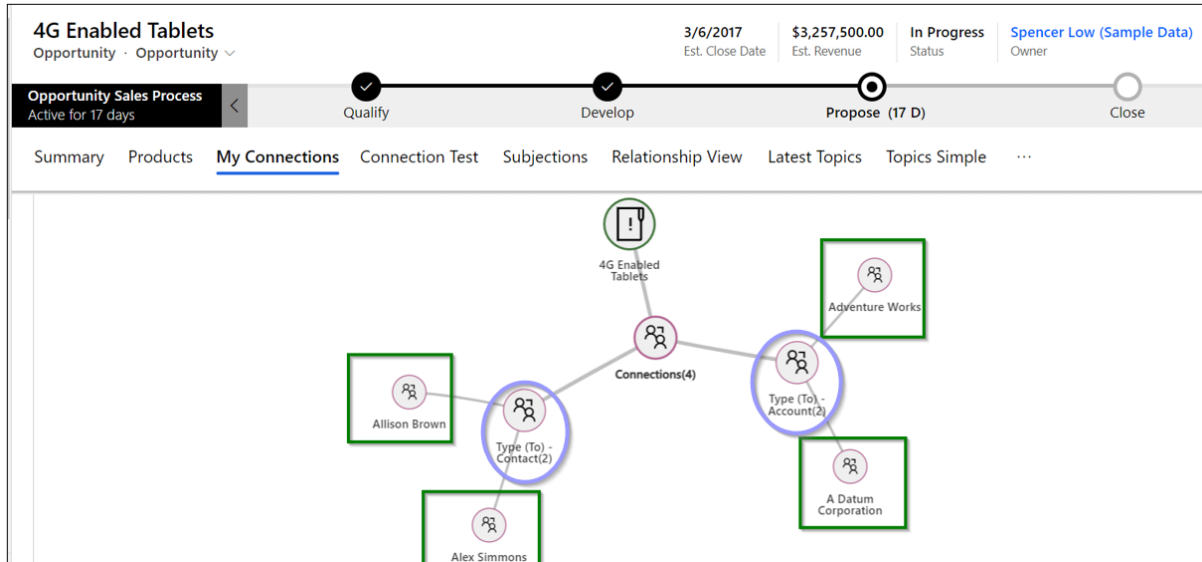
Measure

--Select--

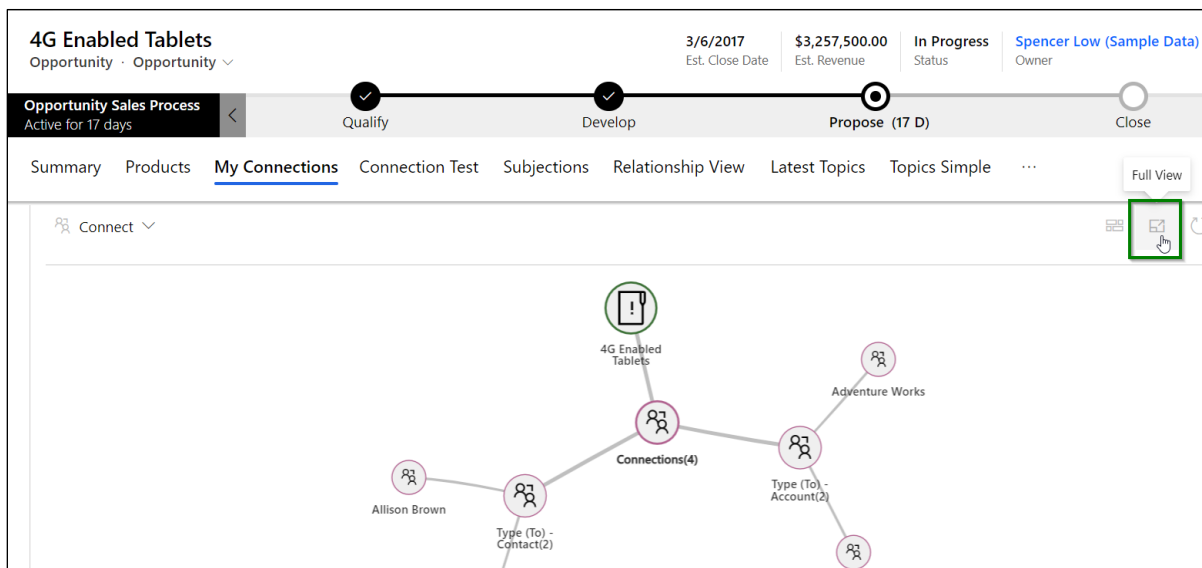
▼

Aggregate Type

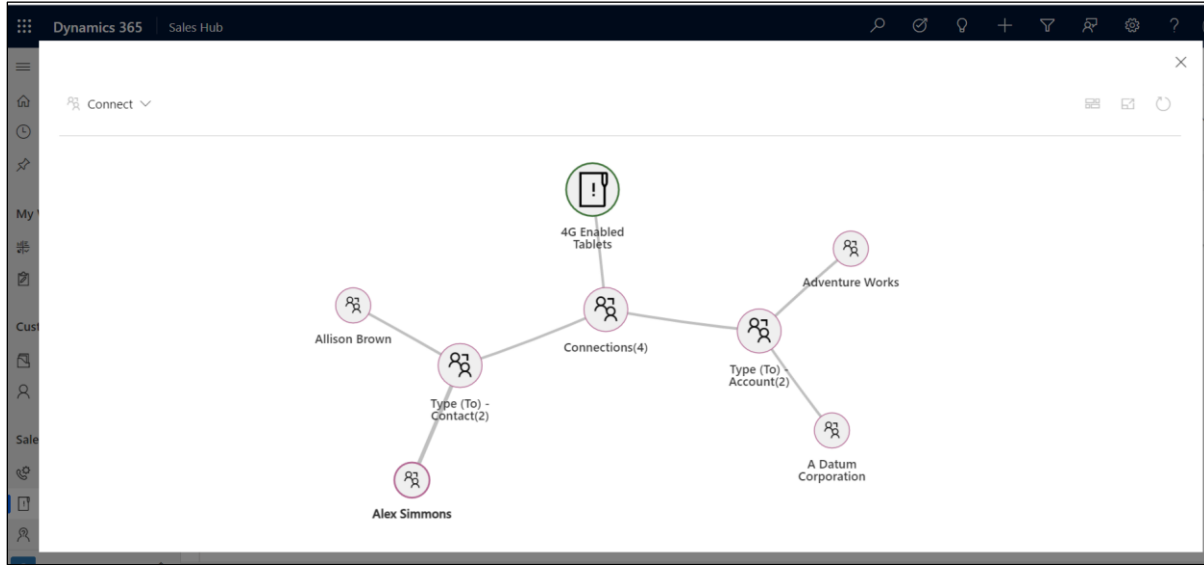
Map My Relationships – User Manual



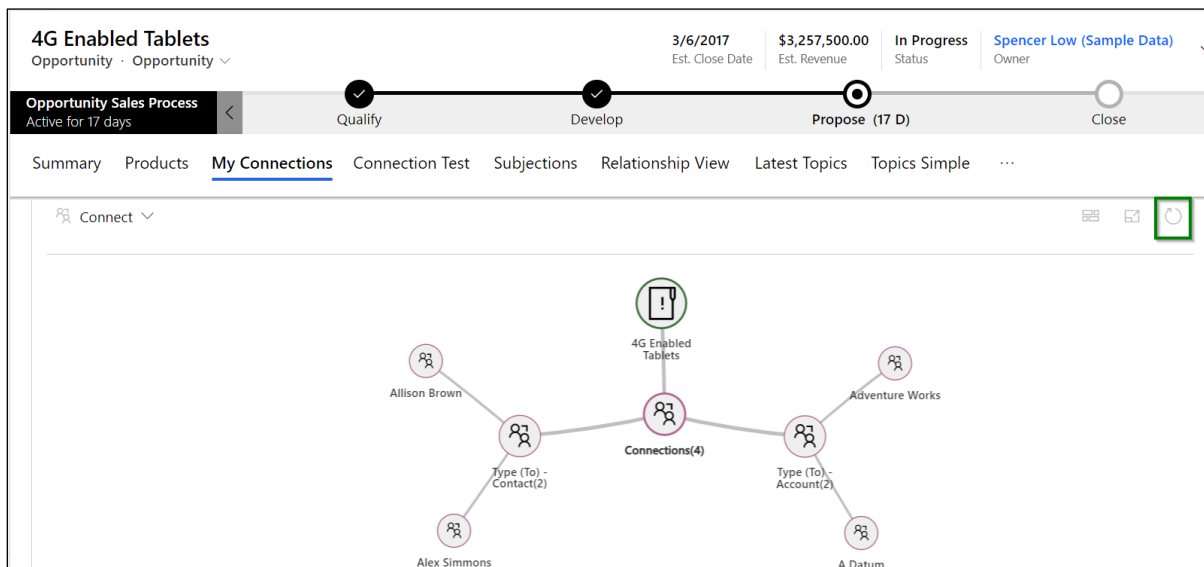
13) Click on 'Full View' button on the right top corner of the control to see the data in expanded screen.



Expanded mode:-



User can also refresh the control if required.



Now let's create a **new connection record** for **this opportunity**. It will display those categories which we configured earlier while binding the connection 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

| Property | Value |
|-------------------------|---|
| Dataset_Display_Key | Active Connections |
| Allowed Role Categories | Sales Team,Business,Family (...) |
| Allowed Entities | account (Multiple), Sales Team,Business,Family (Multiple) |
| Default Control | 0 (SingleLine.Text) |

4G Enabled Tablets

Opportunity · Opportunity

3/6/2017 Est. Close Date \$3,257,500.00 Est. Revenue In Progress Status [Spencer Low \(Sample Data\)](#) Owner

Opportunity Sales Process Active for 17 days

Qualify Develop **Propose (17 D)** Close

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

Connect

- Business
- Family
- Sales Team

| 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 |

- Let's pick 'Sales Team' for now. It will list out all the connection roles that fall under this role category.

Map My Relationships – User Manual

4G Enabled Tablets

Opportunity · Opportunity ▾

3/6/2017
Est. Close Date

\$3,257,500.00
Est. Revenue

In Progress
Status

Spencer Low (Sample Data)
Owner

Opportunity Sales Process

Active for 17 days

Quality

Develop

Propose (17 D)

Close

Summary

Products

My Connections

Connection Test

Subjections

Relationship View

Latest Topics

Topics Simple

...

Connect ▾

Business >

Family >

Sales Team >

AW

AS

AB

| Connected To | Role (To) | Description | Connection Name |
|---------------------|------------------------------|-------------|---------------------|
| A Datum Corporation | Delivery Professional | ppp | A Datum Corporation |
| | Account Manager | | |
| | Territory Manager | MC | Adventure Works |
| | Service Professional | | |
| Alex Simmons | Industry Expert | | Alex Simmons |
| | Sales Professional | | |
| Allison Brown | Technical Sales Professional | | Allison Brown |

Open

- 2) Select **'Sales Professional'**. This will open a quick create form where **'Role'** would come selected as by default since we have chosen **'Sales Professional'** earlier.

Sales Hub

Save

Save & Close

+ New

Refresh

Export to PDF

Close as Won

Close as Lost

4G Enabled Tablets

Opportunity · Opportunity ▾

3/6/2017
Est. Close Date

\$3,257,500.00
Est. Revenue

Opportunity Sales Process

Active for 17 days

Quality

Develop

Propose

Summary

Products

My Connections

Connection Test

Subjections

Relationship View

Latest Topics

Connect ▾

Connected To

Role (To)

Description

A Datum Corporation

Sales Professional

ppp

Adventure Works

MMC

AD Work

Alex Simmons

Sales Professional

Allison Brown

Sales Professional

Open

Create Connection

Role

Sales Professional ▾

Select Entity *

Select an entity ▾

Selection Type

☐ Lookup

☒ Relationships View

Selected Record

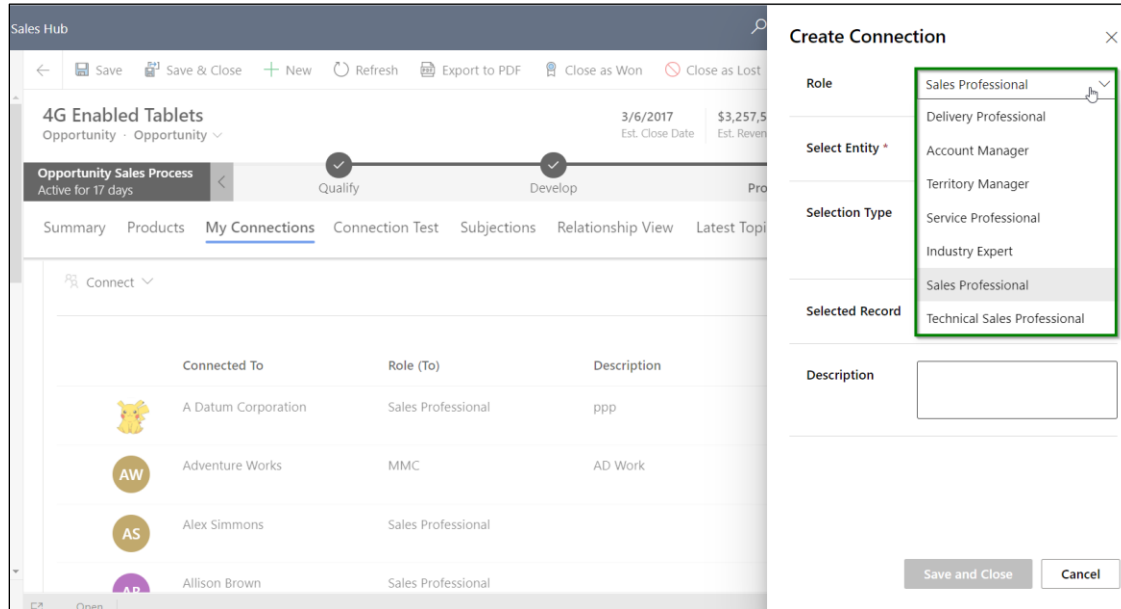
Select a record 🔍

Description

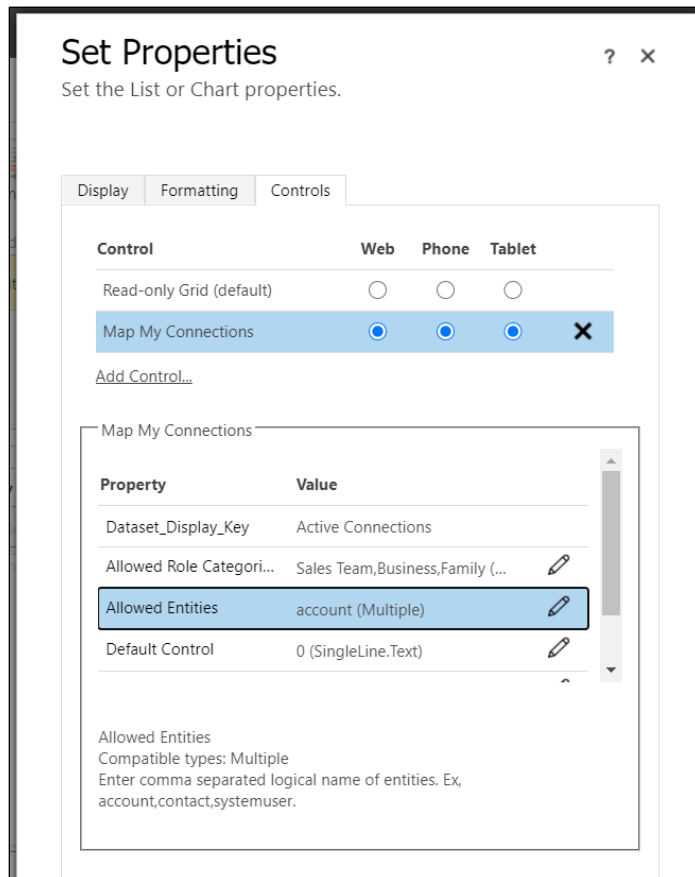
Save and Close

Cancel

3) You can also change the connection role from here if required.



4) Let's keep 'Sales Professional' for now and select the entity. All those entities that are entered in the connection control configuration will be listed here. We currently have only 'account'.



Map My Relationships – User Manual

The screenshot shows the Sales Hub interface with the 'My Connections' tab selected. The 'Create Connection' dialog is open on the right. The 'Role' is set to 'Sales Professional'. The 'Select Entity' dropdown is open, showing 'Account' selected. The 'Selection Type' has two options: 'Lookup' (selected) and 'Relationships View'. The 'Selected Record' field is empty. The 'Description' field is empty. The 'Save and Close' and 'Cancel' buttons are at the bottom.

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

- 5) As we have set '0' for 'Allow to connect using Relationships Map', user will be shown both 'Lookup' and 'Relationships View' options under 'Selection Type'. Setting the value as '1' will show only 'Lookup' option in here.

The 'Set Properties' dialog is shown with the 'Controls' tab selected. The 'Map My Connections' control is highlighted. The 'Add Control...' button is visible. The 'Map My Connections' control has the following properties:

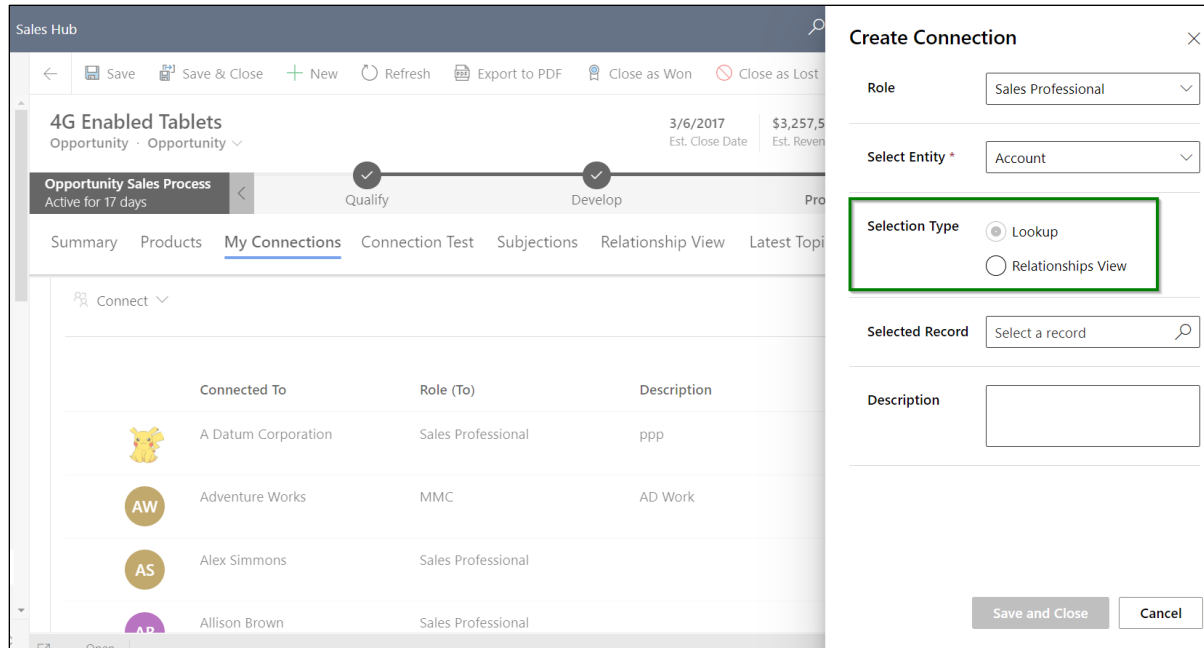
| Control | Web | Phone | Tablet |
|--------------------------|----------------------------------|----------------------------------|----------------------------------|
| Read-only Grid (default) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Map My Connections | <input checked=""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

Add Control...

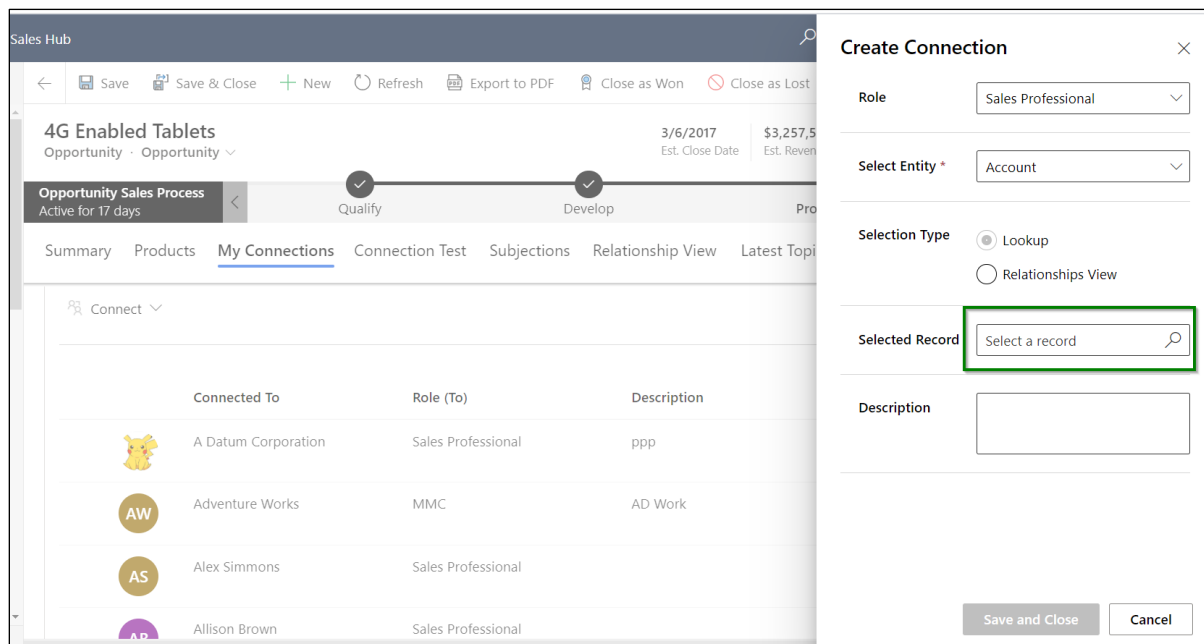
| Property | Value | Edit |
|--------------------------|----------------------------------|------|
| Dataset_Display_Key | Active Connections | |
| Allowed Role Categori... | Sales Team,Business,Family (...) | |
| Allowed Entities | account (Multiple) | |
| Default Control | 0 (SingleLine.Text) | |
|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

Allow to connect using Relationships Map?
Compatible types: SingleLine.Text
Enter either 0 or 1. 0 = Yes and 1 = No.

Map My Relationships – User Manual



- 6) We have selected '**Lookup**' here as we want to search for a record through lookup field. Click on '**Select a record**'.



- 7) Search for a record that you want to make a connection with and click on '**Add**'.

Map My Relationships – User Manual

The screenshot shows the Sales Hub interface with the 'My Connections' tab selected. A 'Lookup Records' dialog box is open on the right, displaying a list of recent accounts. The 'Best o' Sales' record is highlighted in the 'Select record' field. The 'Add' button at the bottom right of the dialog is highlighted with a green box.

Lookup Records

Select record

Best o' Sales

Look for Account

Recent Accounts

- Alpine Ski House
- SHU Ltd
- Baker's Treat
- Zara Sales
- Claunks LTD
- Blue Yonder Airlines
- Adventure Works

+ New Account

Add Cancel

8) This will set the record to the field.

The screenshot shows the Sales Hub interface with the 'My Connections' tab selected. A 'Create Connection' dialog box is open on the right. The 'Role' is set to 'Sales Professional', 'Select Entity' is 'Account', and 'Selection Type' is 'Lookup'. The 'Selected Record' field is highlighted with a green box and contains the text 'Best o' Sales'. The 'Description' field is empty. The 'Save and Close' button is highlighted with a green box.

Create Connection

Role: Sales Professional

Select Entity: Account

Selection Type: ☒ Lookup ☐ Relationships View

Selected Record: Best o' Sales

Description:

Save and Close Cancel

9) You can add description if required.

Map My Relationships – User Manual

Create Connection

Role: Sales Professional

Select Entity *: Account

Selection Type: ☒ Lookup ☐ Relationships View

Selected Record: Best o' Sales

Description: Account Connection

Save and Close Cancel

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

10) Click on 'Save and Close'.

Create Connection

Role: Sales Professional

Select Entity *: Account

Selection Type: ☒ Lookup ☐ Relationships View

Selected Record: Best o' Sales

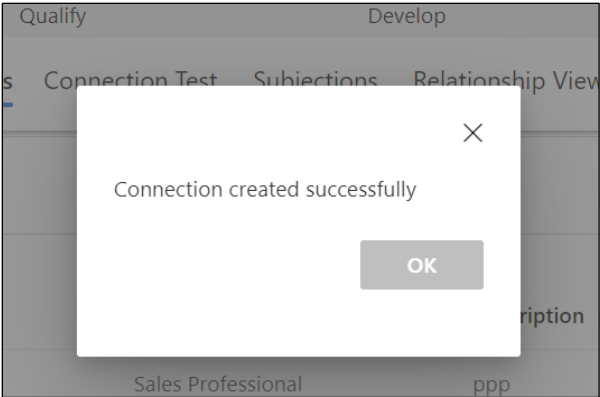
Description: Account Connection

Save and Close Cancel

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

11) You will see the below success pop-up once the connection is added.

Map My Relationships – User Manual



12) Click 'OK' and the newly added connection will start showing up in both grid and the relationship view.

4G Enabled Tablets

Opportunity · Opportunity ▾

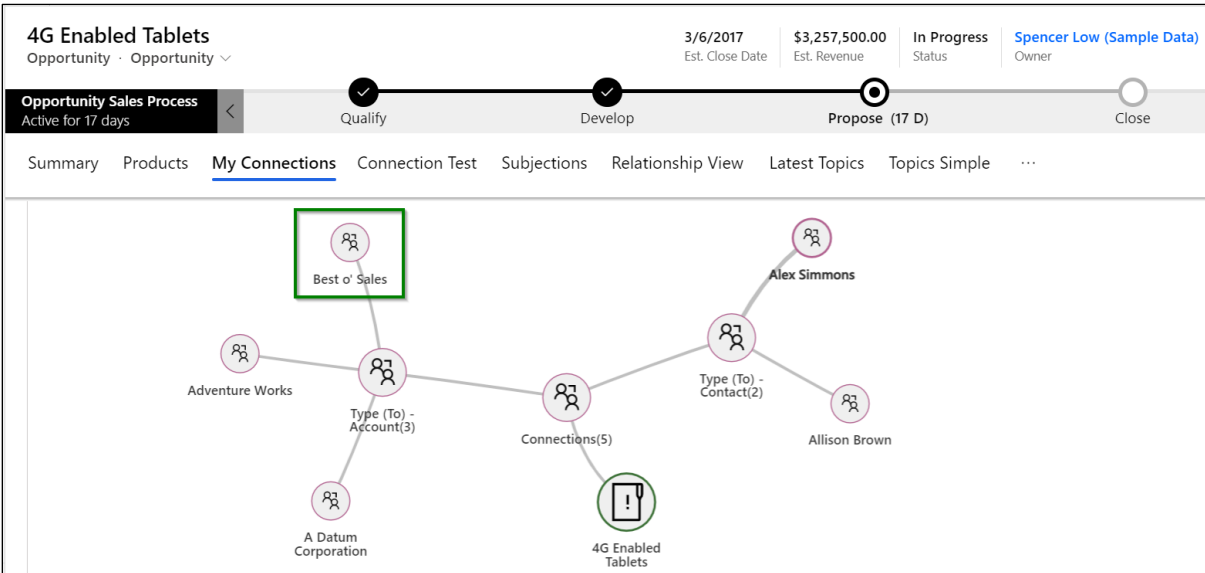
3/6/2017 Est. Close Date \$3,257,500.00 Est. Revenue In Progress Status Spencer Low (Sample Data) Owner

Opportunity Sales Process Active for 17 days

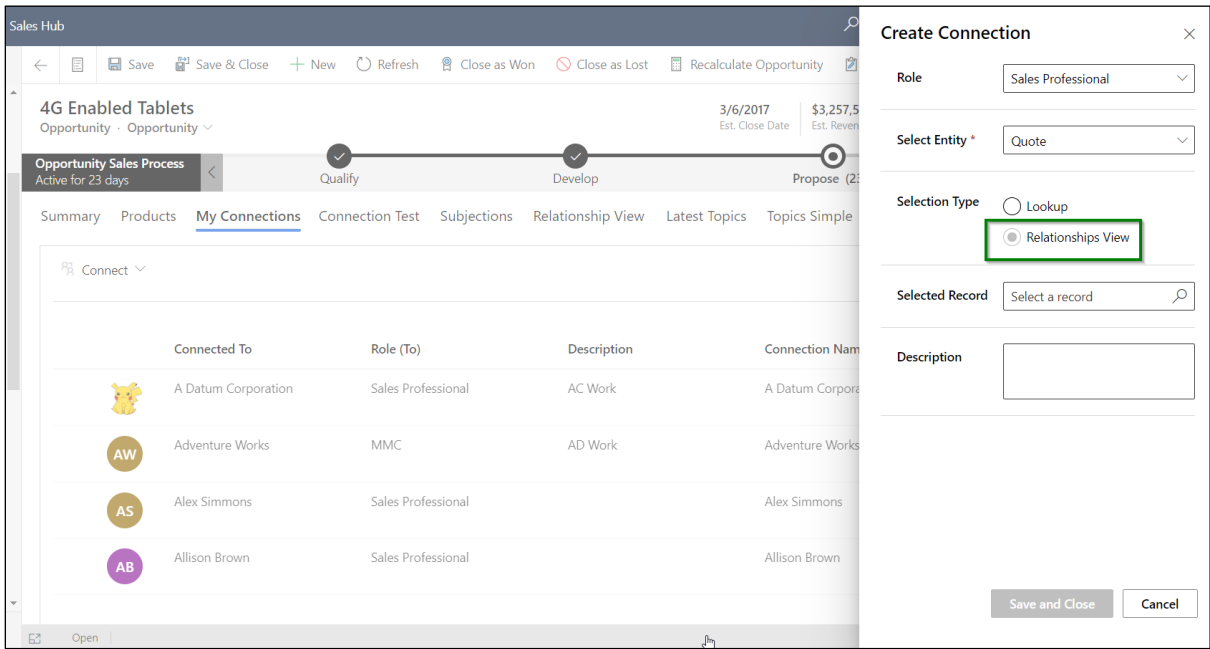
Qualify Develop Propose (17 D) Close

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

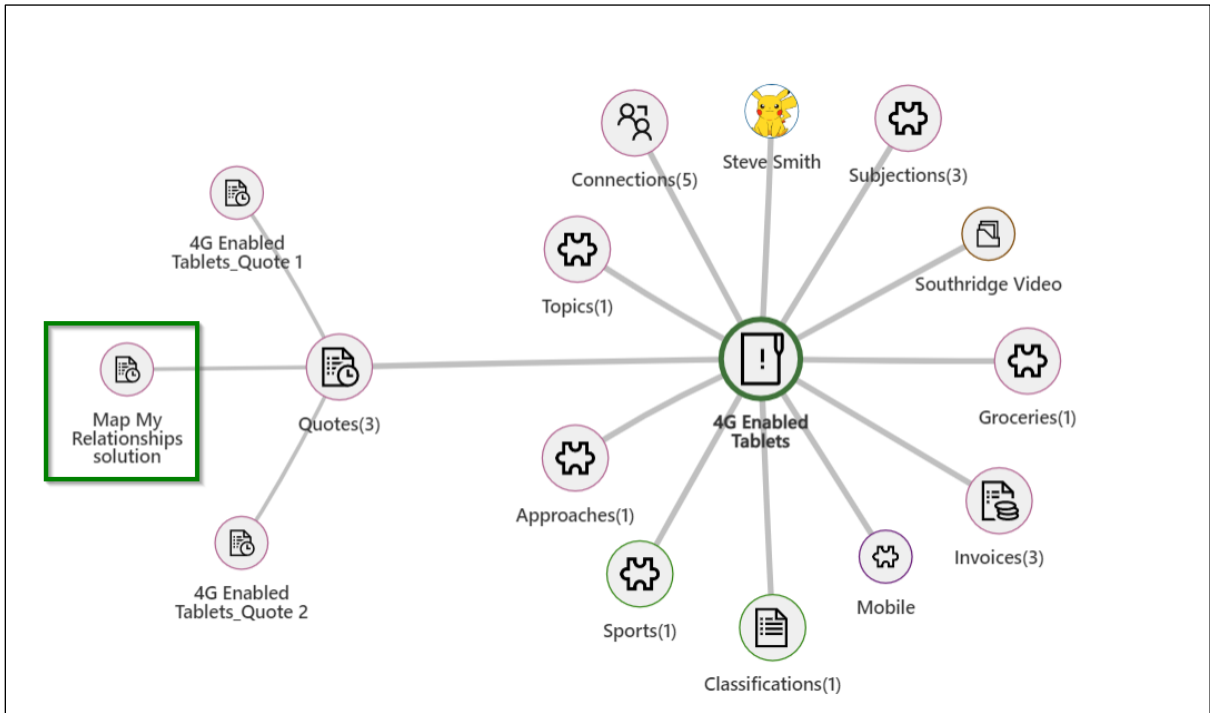
| Connected To | Role (To) | Description | Connection Name |
|---------------------|--------------------|--------------------|---------------------|
| A Datum Corporation | Sales Professional | ppp | A Datum Corporation |
| Adventure Works | MMC | AD Work | Adventure Works |
| Alex Simmons | Sales Professional | | Alex Simmons |
| Allison Brown | Sales Professional | | Allison Brown |
| Best o' Sales | Sales Professional | Account Connection | Best o' Sales |



How to add a connection using relationship view?



a) Select a quote record through the relationship view.



b) Proceed to 'Save and Close'.

Sales Hub

4G Enabled Tablets

Opportunity · Opportunity

3/6/2017

\$3,257.5

Est. Close Date

Est. Revenue

Opportunity Sales Process

Active for 23 days

Qualify

Develop

Propose (2)

Summary

Products

My Connections

Connection Test

Subjections

Relationship View

Latest Topics

Topics Simple

Connect

| | Connected To | Role (To) | Description | Connection Name |
|----|---------------------|--------------------|-------------|---------------------|
| | A Datum Corporation | Sales Professional | AC Work | A Datum Corporation |
| AW | Adventure Works | MMC | AD Work | Adventure Works |
| AS | Alex Simmons | Sales Professional | | Alex Simmons |
| AB | Allison Brown | Sales Professional | | Allison Brown |

Create Connection

RoleSales Professional

Select EntityQuote

Selection Type

Lookup

Relationships View

Selected RecordMap My Relationships sol...

Description

Save and CloseCancel

4G Enabled Tablets

Opportunity · Opportunity

3/6/2017

\$3,257.5

Est. Close Date

Est. Revenue

Opportunity Sales Process

Active for 23 days

Qualify

Develop

Propose (2)

Summary

Products

My Connections

Connection Test

Subjections

Relationship View

Latest Topics

Topics Simple

Connect

| | Connected To | Role | Description | Connection Name |
|----|---------------------|--------------------|-------------|---------------------|
| | A Datum Corporation | Sales Professional | AC Work | A Datum Corporation |
| AW | Adventure Works | MMC | AD Work | Adventure Works |
| AS | Alex Simmons | Sales Professional | | Alex Simmons |
| AB | Allison Brown | Sales Professional | | Allison Brown |

Connection created successfully

OK

Map My Relationships – User Manual

c) Check for the newly created connection, it will appear in the grid.

4G Enabled Tablets
Opportunity · Opportunity ▾

3/6/2017
Est. Close Date

\$3,257,500.00
Est. Revenue

In Progress
Status

Spencer Low (Sample Data)
Owner

Opportunity Sales Process
Active for 23 days

Qualify

Develop

Propose (23 D)

Close

Summary

Products

My Connections

Connection Test

Subjections

Relationship View







Latest Topics

Topics Simple

Simple MMR View

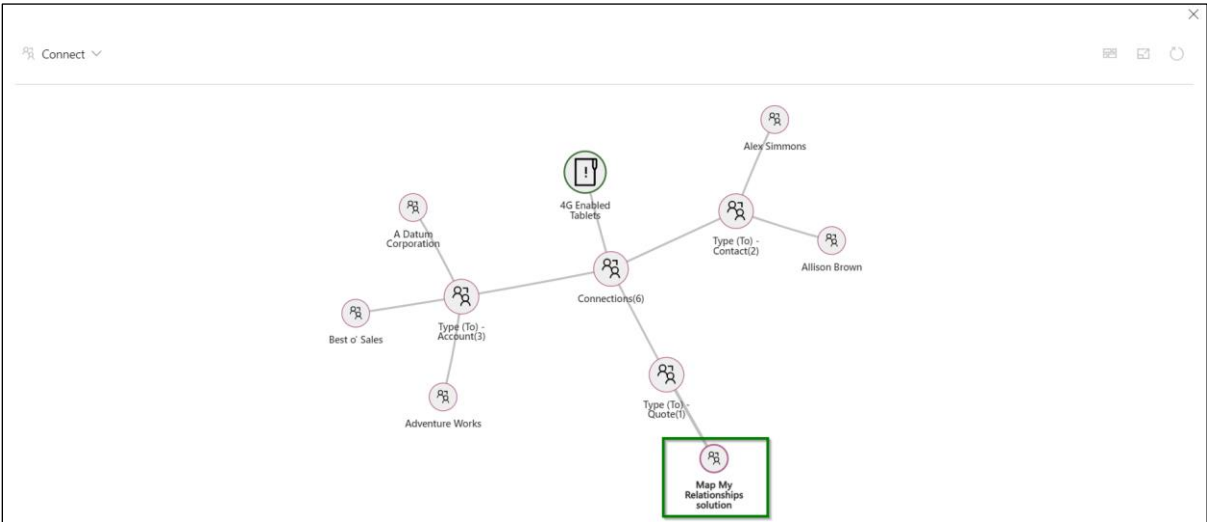
Invoices

...

| | | | | |
|---|-------------------------------|--------------------|--------------------|-------------------------------|
|  | A Datum Corporation | Sales Professional | AC Work | A Datum Corporation |
|  | Adventure Works | MMC | AD Work | Adventure Works |
|  | Alex Simmons | Sales Professional | | Alex Simmons |
|  | Allison Brown | Sales Professional | | Allison Brown |
|  | Best o' Sales | Sales Professional | Account Connection | Best o' Sales |
|  | Map My Relationships solution | Sales Professional | | Map My Relationships solution |

Load More →

As well as in the relationship view of connections:



- 13) This is not where it ends, user is also given a provision to update the connection record. Double click on the connection record that you would like to update.

Audio Equipment
Opportunity · Opportunity ▾

4/20/2017 Est. Close Date | \$8,710,785.00 Est. Revenue | In Progress Status | Anne Weiler (Sample Data) Owner

Opportunity Sales Process
Active for 31 days

Qualify | Develop | **Propose (31 D)** | Close

Summary | Products | **My Connections** | Connection San | STD | Connection Test | Connection Tiny View | Subjections | Relationship View | ...

| | | | |
|----|------------------|-----------------|------------------|
| AS | Alex Simmons | Former Employer | Alex Simmons |
| AH | Alpine Ski House | MMC | Alpine Ski House |
| BT | Baker's Treat | Former Employer | Treats |
| DF | Derby FC | MMC | Football Club |

- 14) Here, we will update the description from blank to something relevant (user can update any of the fields based on the requirement). Click on **'Save and Close'**.

Sales Hub

← Save Save & Close + New Refresh Export to PDF Close as Won Close as Lost

Audio Equipment
Opportunity · Opportunity ▾

4/20/2017 Est. Close Date | \$8,710,785.00 Est. Revenue

Opportunity Sales Process
Active for 31 days

Qualify | Develop | **Propose (31 D)** | Close

Summary | Products | **My Connections** | Connection San | STD | Connection Test | Connection Tiny View

Update Connection

Role: Former Employer ▾

Select Entity *: Contact ▾

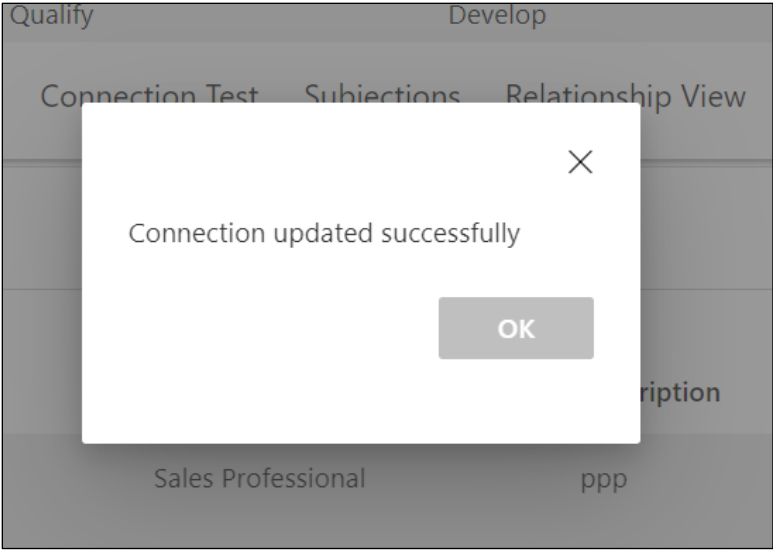
Selection Type: ☐ Lookup ☒ Relationships View

Selected Record: Alex Simmons

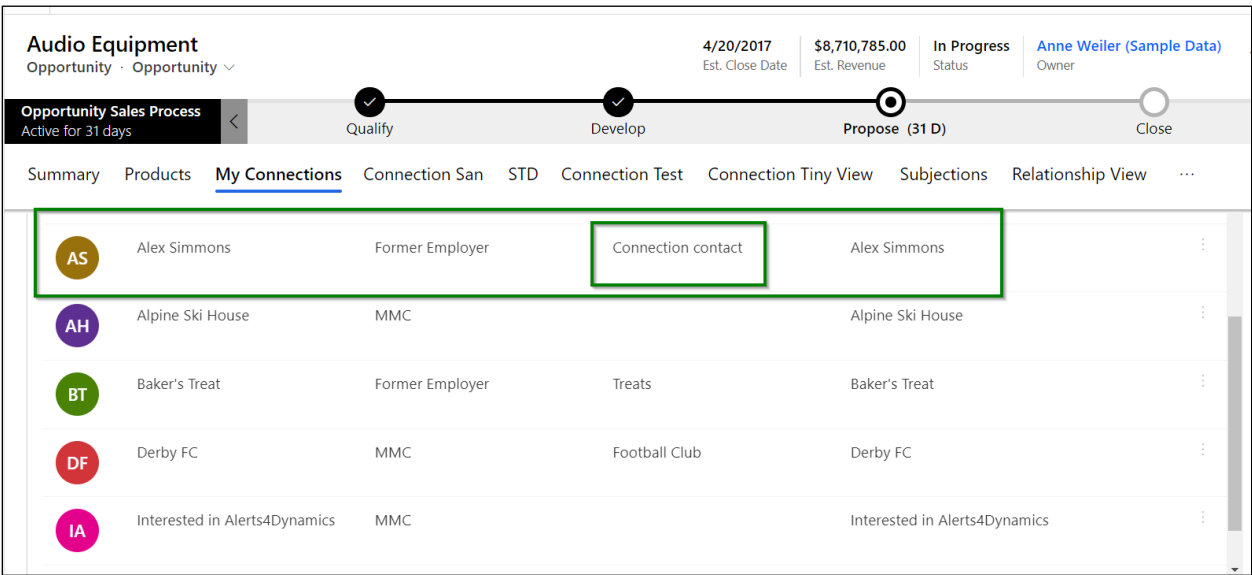
Description: Connection contact

Save and Close Cancel

- 15) You will see the below message pop-up. Click **'OK'**.



16) Updates will reflect into the record.



Along with create and update, user can also delete the connection record.

Deleting from **larger** connection control –

Map My Relationships – User Manual

4G Enabled Tablets

Opportunity · Opportunity

3/6/2017
Est. Close Date

\$3,257,500.00
Est. Revenue

In Progress
Status

Spencer Low (Sample Data)
Owner

Opportunity Sales Process

Active for 31 days

Qualify

Develop

Propose (31 D)

Close

Summary

Products

My Connections

Connection San

STD

Connection Test





Connection Tiny View

Subjections

Relationship View

...

Connect To

| Connected To ↑ | Role (To) | Description | Connection Name | |
|---|--------------------|------------------|-----------------------------|-------------------|
|  A Datum Corporation | Sales Professional | Datum connection | A Datum Corporation | <div>Delete</div> |
|  Adventure Works Electronics | Sales Professional | | Adventure Works Electronics | ⋮ |
|  City Power & Light | Sales Professional | | City Power & Light | ⋮ |
|  Derby FC | Sales Professional | | Derby FC | ⋮ |

Connection record is deleted successfully.

Connection San

STD

Connection Test

Connection Tiny View

Connection deleted successfully

OK

Deleting from **smaller card view** –

4G Enabled Tablets

Opportunity · Opportunity

Opportunity Sales Process

Active for 31 days

Qualify

Develop

Summary

Products

My Connections


Connection San


STD


Connection Test


Connect To

...

 Adventure Works Electronics
Sales Professional

 City Power & Light
Sales Professional

 Derby FC
Sales Professional

 Map My Relationships solution
Account Manager

⋮

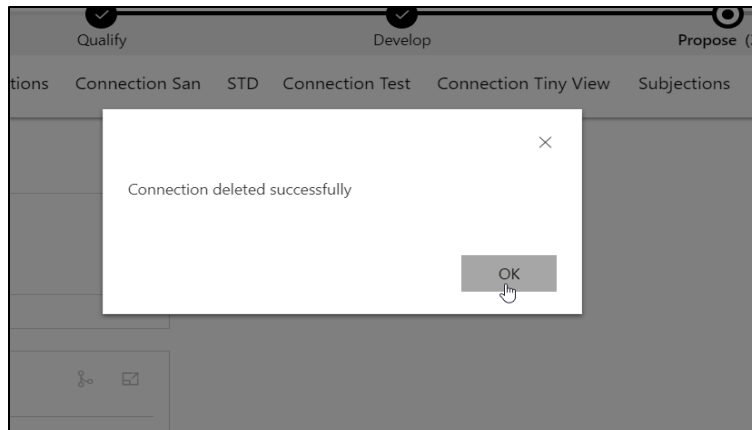
⋮

⋮

⋮

Delete

Connection record is deleted successfully.



This is how the connection control works and allows users to manage the connection records systematically.

Create Connections within Relationship View

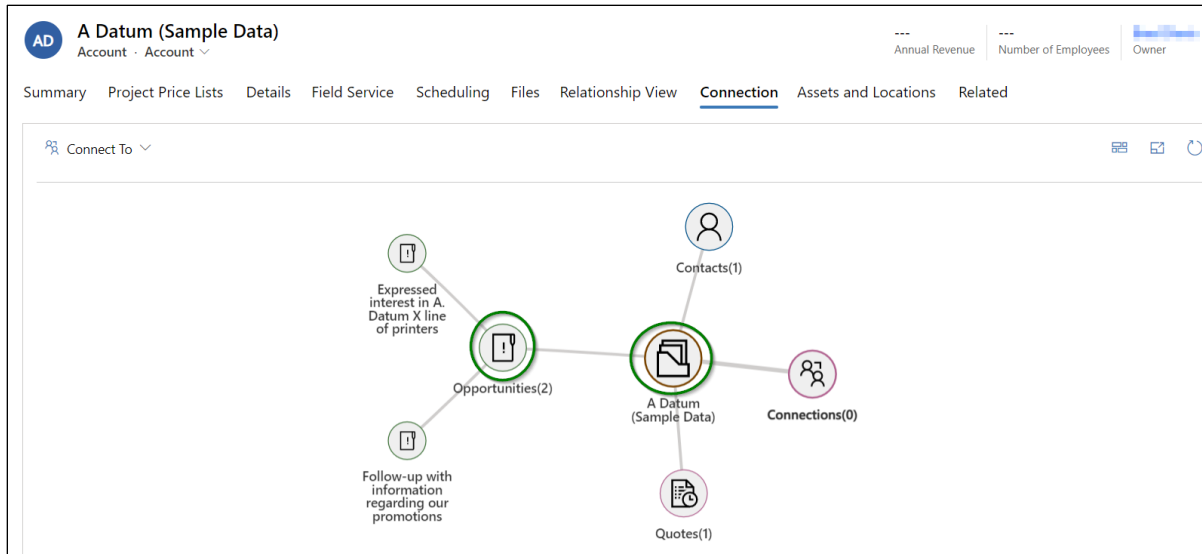
Once the connection control is established, users can further drill N-level down through the records within the connection relationship view and connect any record to the main primary record as a connection.

This is explained in detail in the below scenario.

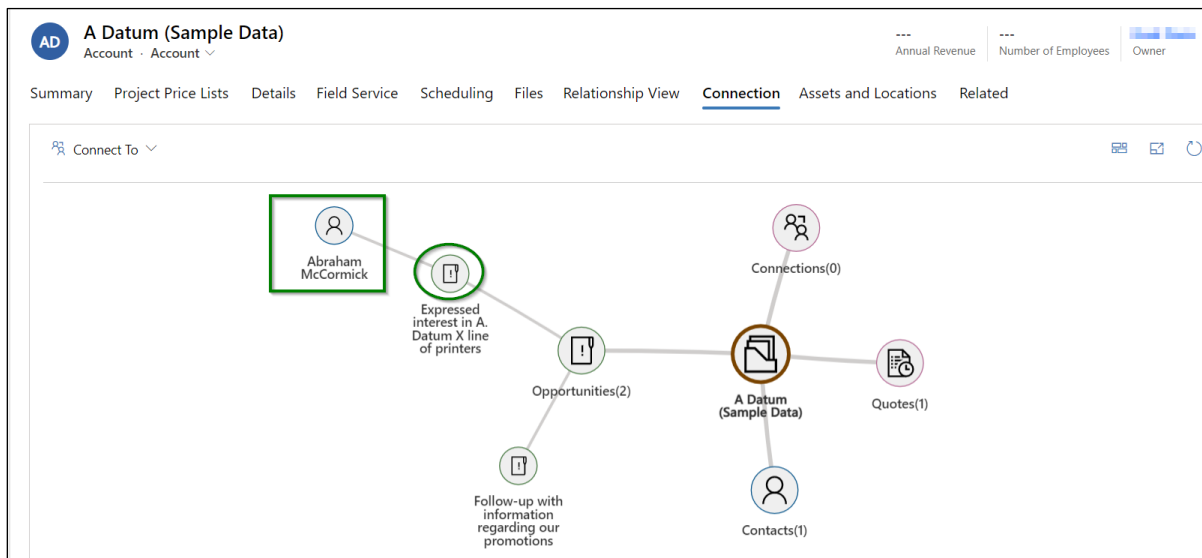
Consider that a user wants to drill through the records within the connection relationship view and connect a specific record to the main primary record (to create a connection).

In this connection relationship view, account '**A Datum (Sample Data)**' is the main record and it has 2 associated opportunities, and user can further drill through '**Expressed interest in A. Datum X line of printers**' opportunity record to see its contact.

Map My Relationships – User Manual



By double clicking on **'Expressed interest in A. Datum X line of printers'**, it will further expand and display its contact as shown below. (Here, we are drilling down through the opportunity record to reach its contact to connect to the main account record **'A Datum (Sample Data)'**).

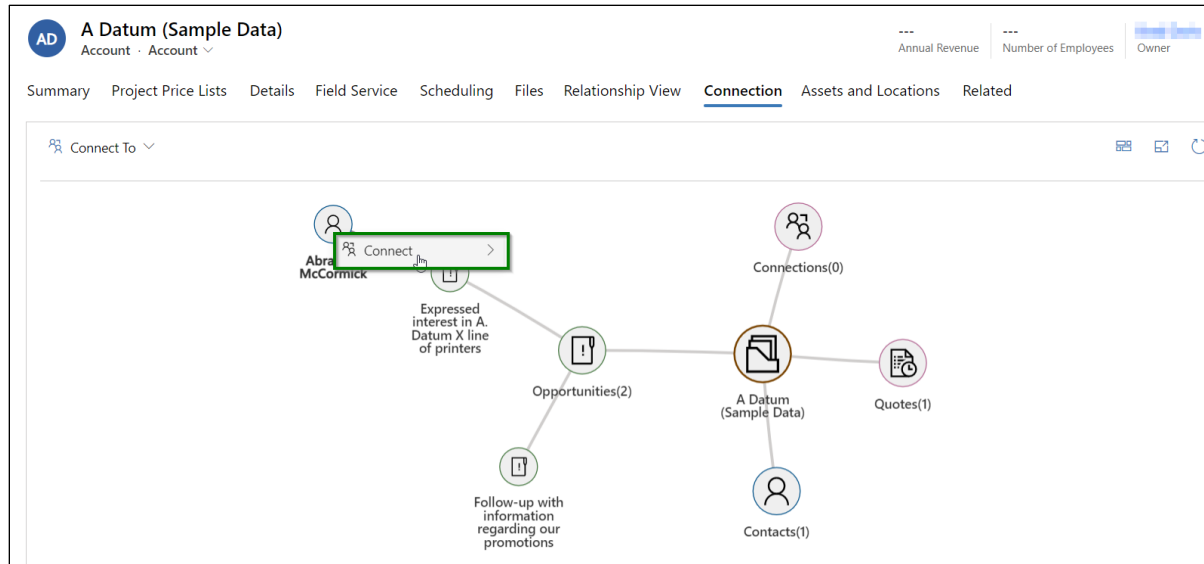


Suppose the user wants to connect this **'Abraham McCormick'** contact to **'A Datum (Sample Data)'** main account record.

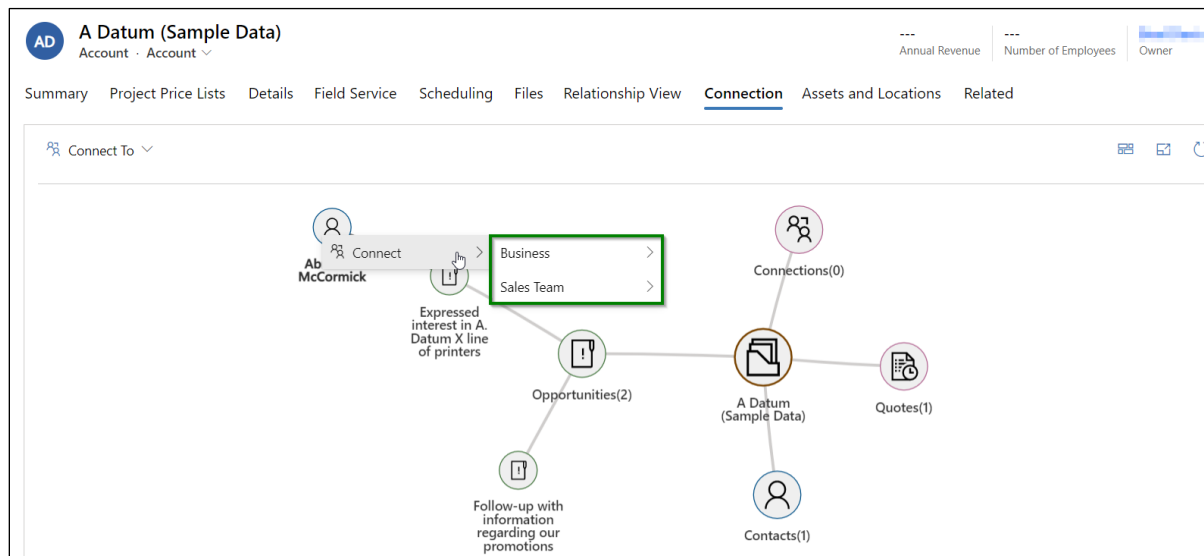
For this, follow the steps given below:

- 1) First, right click on **'Abraham McCormick'** and click on **'Connect'** option.

Map My Relationships – User Manual

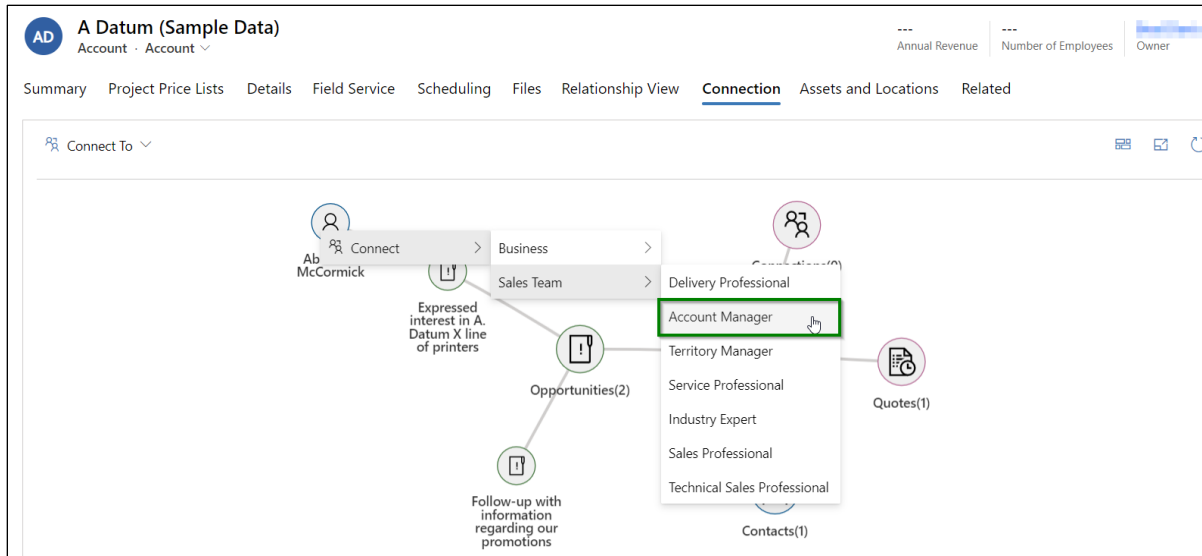


- 2) Select the role category that you would like to create a connection with to account. (Here, it will populate the list of all those role categories that are enabled on the connection control for creating connections).



- 3) Pick a category and choose one of the roles under it.

Map My Relationships – User Manual

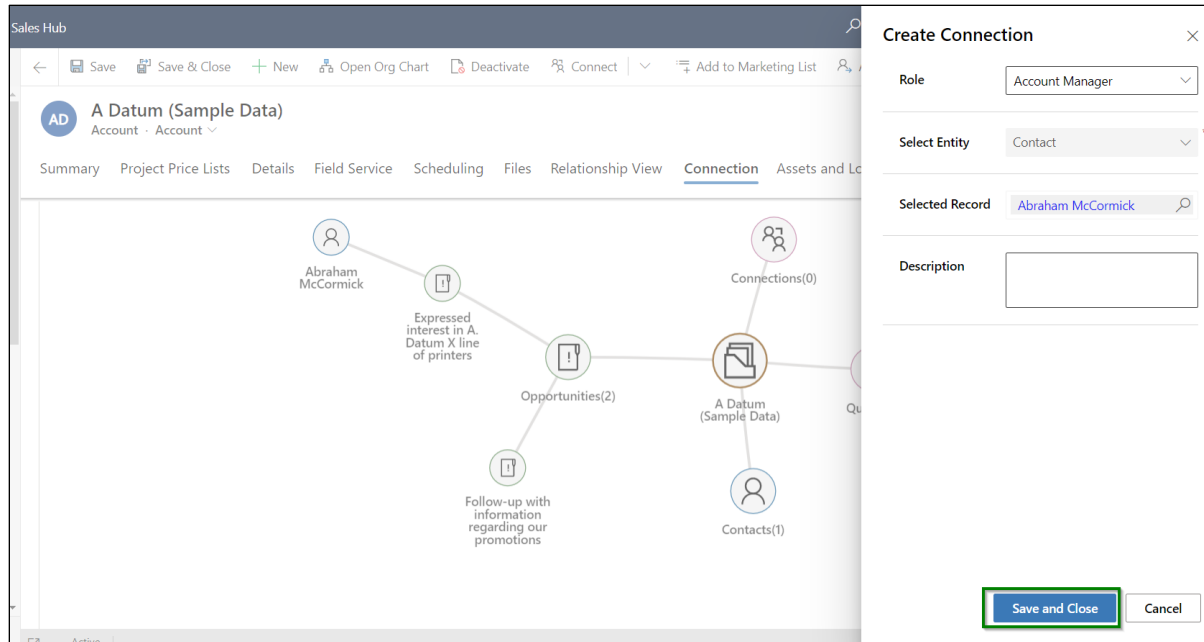


- 4) Once connection role is selected, **'Create Connection'** form will open up with contact record set to the field **'Selected Record'**.

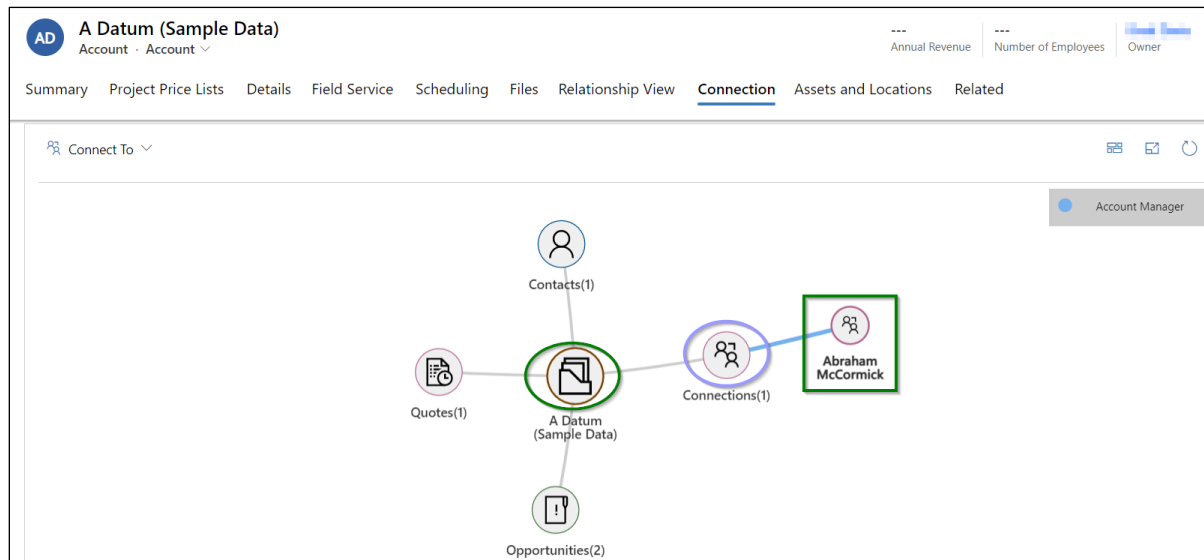
The screenshot shows the 'Create Connection' form. The 'Role' is set to 'Account Manager'. The 'Select Entity' is 'Contact'. The 'Selected Record' is 'Abraham McCormick' (highlighted with a green box). The 'Description' field is empty. The background shows the same relationship map as the previous screenshot.

- 5) Click on **'Save and Close'**.

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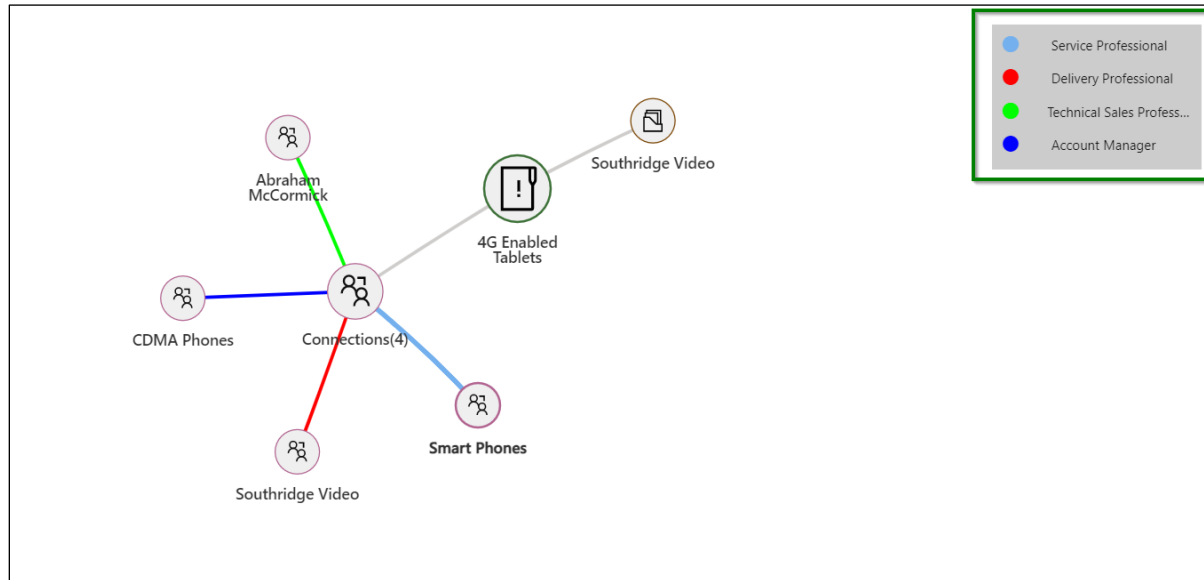
- 6) The connection is now successfully created and it will start appearing under 'Connections' of 'A Datum (Sample Data)' account record.



With the help of the above steps, we have successfully managed to connect a record to the main primary record from the connection relationship view itself. This has speeded up the process of creating a connection where user did not have to navigate anywhere else outside the connection relationship view and separately search the record through any lookups.

Colour legends in connection relationship view

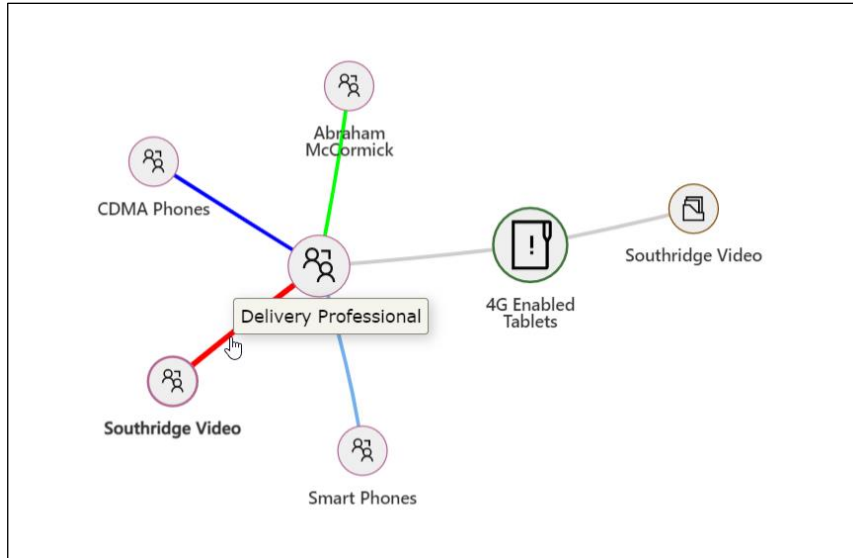
Colour legends are now shown inside connection relationship view based on the connection roles using which the records are connected to the main/primary entity record. This will help the users to easily identify the connection roles as illustrated in the below example:



- A contact record '**Abraham McCormick**' is connected to '**4G Enabled Tablets**' opportunity through '**Technical Sales Professional**' connection role
- An opportunity record '**CDMA Phones**' is connected to '**4G Enabled Tablets**' opportunity through '**Account Manager**' connection role
- An account record '**Southridge Video**' is connected to '**4G Enabled Tablets**' opportunity through '**Delivery Professional**' connection role
- An opportunity record '**Smart Phones**' is connected to '**4G Enabled Tablets**' opportunity through '**Service Professional**' connection role

This connection role is also visible to user by hovering over the edges as shown below;

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In addition to all of the above, user has also been given a provision to navigate to the actual connection record (may it be of any entity) by clicking on the record hyperlink

Suppose the user is standing on the connection grid and wants to quickly navigate to the actual connection record, then -

- 1) The user has to click on the record hyperlink.

4G Enabled Tablets
Opportunity · Opportunity ▾

3/6/2017 Est. Close Date | Est. Revenue | In Progress Status | Owner

Opportunity Sales Process
Active for 50 days

Qualify | Develop | **Propose (50 D)** | Close


Summary | Connections Smaller View | Products | Quotes | Invoices | Relationship View | **Connections** | Tab | Field Service | Files | Related

Connect To ▾

| Connected To ↑ | Role (To) | Type (To) | Description | Created By |
|-----------------------------------|------------------------------|-------------|-------------|------------|
| Abraham McCormick | Technical Sales Professional | Contact | | |
| CDMA Phones | Account Manager | Opportunity | | |
| Smart Phones | Service Professional | Opportunity | | |
| Southridge Video | Delivery Professional | Account | AS | |

- 2) Once clicked, the user will be redirected to the actual contact record.

←
Save
Save & Close
+ New
Deactivate
Connect
▼
Add to Marketing List


Abraham McCormick
 Contact · Contact ▼

Summary
Details
Scheduling
Files
Relationship View
Related

CONTACT INFORMATION

First Name + **Abraham**

Last Name * **McCormick**

Job Title ---

Timeline

Search timeline

Enter a note...

Note: Not only the connection record but also all the lookup type fields/columns are supported too for this navigation.

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