Relationships

User Manual

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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.
- Addition of the "View As Table" feature, allowing users to see bulk records in a tabular view on the map.
- Support to show the activity parties entities/relationships on the map.

• Support to auto expand the map up to 1 level of the hierarchical relationships on loading of the map.

Salient Features - Map My Connection control

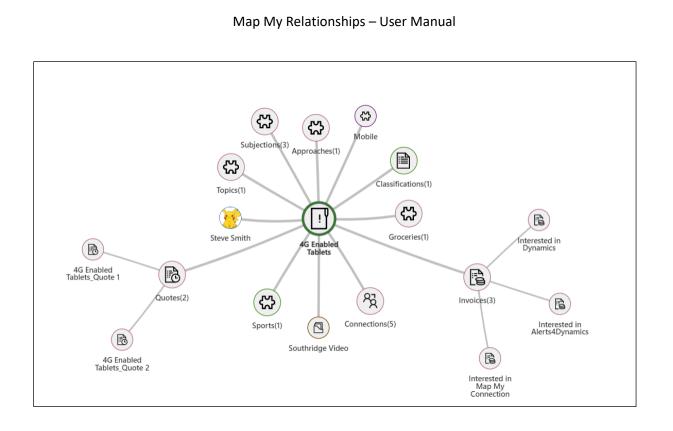
- Capability to configure the connection control to create, update, view and delete the connection records more efficiently to improve an overall connection management
- Ability to add filters on connection role categories and entities that user wishes to create a connection with. Connection role category 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

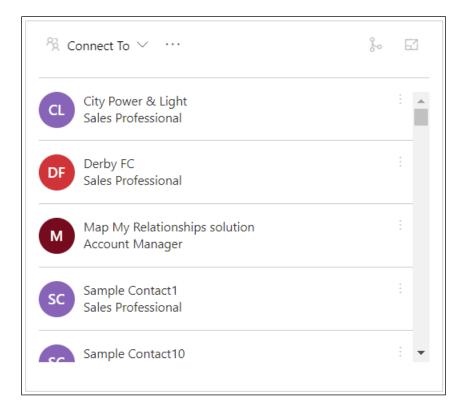
Map My Relationships:



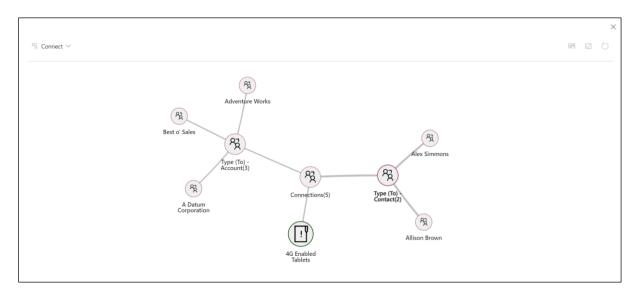
Map My Connections – Larger Grid:

	ed Tablets · Opportunity ~			3/6/2017 \$3,257,500.00 In Progression Est. Close Date Est. Revenue Status	Signature Spencer Low (Sample Data Owner
portunity tive for 31 d	Sales Process <	Qualify	Develop	Propose (31 D)	Close
ummary	Products My Connections	Connection San ST	D Connection Test Connection	Tiny View Subjections Relationship View	
⁶ 켰 Conn	ect To $$				% E1 (
	Connected To ↑	Role (To)	Description	Connection Name	
AE	Adventure Works Electronics	Sales Professional		Adventure Works Electronics	
CL	City Power & Light	Sales Professional		City Power & Light	
DF	Derby FC	Sales Professional		Derby FC	
м	Map My Relationships solution	Account Manager		Map My Relationships solution	

Map My Connections – Smaller cards:



Map My Connections – Relationship view:



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

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roject Service - Opport < Qualify	A Propose		A Contract (29 D)	⊖ Close	
iummary Map My Connections Products Connect		Field Service	Files Related		
Customer Stakeholders	Sales Team		Connected Accounts		
[®] Connect To ∨ ···	$^{ m R}$ Connect To $ \checkmark \cdots$	% ⊑1	$^{\it R}$ Connect To $ \smallsetminus \cdots$	ઝ	E
BK Benno Kurmann : Stakeholder info@fineartschool.net	BJ Barry John Industry Expert Barry@DecDevCorp	: .onmicrosoft.c	Alpine Ski House Employer Cathan@alpi	neskihouse.com	
RP Rok Palčič : Stakeholder Rok@northwindtraders.com	GC Gaurav Chatterjee Delivery Professional Gaurav@DecD	: evCorp.onmic	BA Blue Yonder Airlines Employer brian@bluey	onderairlines.com	
	Larry Lane Territory Manager Larry@DecDevCo	: prp.onmicrosof	CL City Power & Light Employer walter@cpan	dl.com	
			Northwind Traders Partner alexw@northw	indtraders.com	

Security Roles

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

- 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.

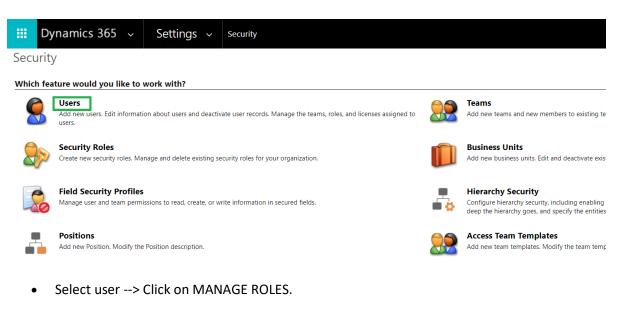
Note: System Administrator has all the rights that Map My Relationships administrator has.

Here are the steps to assign security role to users.

• Go to Advanced Settings --> Settings --> Security.

ettings ~ Business	s Management System		
tomization	System		
tomization	System		
Customizations	Administration	Em	ail Configuration
Solutions	Security	Act	tivity Feeds Confi
Microsoft AppSource	Data Management	Act	tivity Feeds Rules
Plug-In Trace Log	System Jobs	Dy	namics 365 App f
Solutions History	Document Manage	🔗 Sal	les Insights
	i Auditing		
	Plug-In Trace Log	Plug-In Trace Log System Jobs Solutions History Document Manage.	Plug-In Trace Log System Jobs Dy

• Select Users.



Dyr	namics 365 🗸 Set	tings ~ s	ecurity			
NEW	🖋 EDIT 🛛 R APPROVE EMAIL	₩ REJECT EMAIL	Å↑ PROMOTE TO ADMIN	MANAGE ROLES	CHANGE BUSINESS U	NIT 🔍 CHAN
₽E	nabled Users 👻					
	Full Name 🛧		Site	Business Unit	Title	Position
	Harry Buttler			classicpublication	15	
	James Grey			<u>classicpublication</u>	15	
	Microsoft Forms Pro			classicpublication	15	
	Oliver Sands			classicpublication	15	
	Power Apps Checker Applica	ation		classicpublicatior	15	
	Power Platform Dataflows C	ommon Data Serv	ice	classicpublication	IS	

• Click on any one of the security roles --> Click Ok.

Manage User Role What roles would you like to ap	S oply to the 1 User you have selected?	×				
Role Name	Business Unit		*			
Lead Assignment Administrator	classicpublications					
Lead Assignment User	classicpublications					
🔲 Map My Relationships Administrate	or classicpublications					
Map My Relationships User	classic publications	1				
Marketing Manager	classic publications					
Marketing Professional	classicpublications					
Omnichannel administrator	classic publications	,				
As you assign security roles to your users, you will enable access and the ability to extract your data. Access is enabled through multiple clients (i.e. Dynamics 365 for Outlook, Dynamics 365 for tablets web-user). You may administer these access privileges by						
	OK Cancel					

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	Yes	Yes
Call and Task)		
Configure tooltips to see more information of	No	Yes
related records		
Configure which actions to allow for related	No	Yes
records		
Configure which images to display to identify	No	Yes
related records		
Configure grouping and aggregation for related	No	Yes
records		
Set Default Views	Yes	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.

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

	Map My Relationship	os – User Manual
🗰 Dynamics 365 🗸 S	ettings ~ Customizations	
Customization	Solution: Default Solution - M	icrosoft Dynamics 365 - Google Chrome
Which feature would you like to work	with?	nics.com/tools/solution/edit.aspx?id=%7bfd140aaf-4
Create, modify, or delete componen processes, and others.	ts in your organ 🏭 PowerApps	
Solutions Create, modify, export, or import a r	nanaged or unr File 🛃 뼈을 Show Depen	dencies 🚆 Solution Layers 🟠 Publish 🚰 Manag
Themes Adjust your organization's colors. Cr		
	Solution Default Solution	General Primary Field Controls
	Components	Entity Definition
	▲ Lage Entities	
	Account	Display Name * Account
	Action Card Action	Plural Name * Accounts

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

Account				
Solution Default Solution	System Forms Active Forms 🗸			
Components	🔲 New 🗸 🗙 Delete 🛛 🚳 Enable	Security Roles 📑 Form	n Order 🔻 瀫 Activa	ate 🛛 🦓 Deactivate
Account	Name	Form State	Form Type 🛧	State
Views	Account Card form	Active	Card	Managed
Fields	Account for Interactive exp	perie Active	Main	Managed
ara 1:N Relationships P⊐ N:1 Relationships	Account - Mobile	Active	Main	Managed
N:N Relationshi	Sales Insights	Active	Main	Managed
Business Rules	Account	Active	Main	Managed
Dashboards	Account Quick Create	Active	Quick Create	Managed
 Action Card Action Action Card Regard 	Account Summary Card	Active	Quick View F	Managed

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.

Here PowerApps			
FILE HOME INSERT			Q
Save As Save As Save and Close D publish Save As Change Remove → Re	edo Body Footer Business Form Preview	able Security Roles now Dependencies Merge anaged Properties Forms	
Save Edit	Select Form	Upgrade	
Form headers now default to high density to display	y more data. Use the new form designer to edit header density. Learn	more	
Sormary Sormary Map My Relationships Project Prive Lists Details Preid Service Prive Common Com	tion: Default Solution		Field Explorer > Fitter Custom Fields Only show unued fields External ID New Field MapMyRelationships Fireferred Resource (Deprecated) Presence Travel Charge (Base)
Audit History Actuals Finitement Applica Resource Preferences		K	
Opportunity Lines Project Price Quotes	Lists		

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.

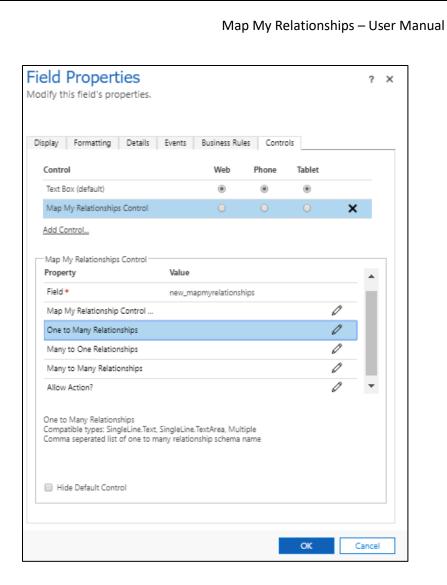
Field Properties Modify this field's properties				?	×
Display Formatting Details	Events Business Ru	ules Contr	ols		
Control	Web	Phone	Tablet		
Text Box (default)	۲	۲	۲		
Add Control					
Select or add	l a custom control to	see its con	figuration.		
		_			
			OK	Cancel	_

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

	Properties this field's properties.	?
Display	Formatting Details Events Business Rules Controls	
	Add Control Select a custom control from the field.	×
	Entity Picker Control	
	Input Mask Map My Relationships Control	
	Map My Relationships Control	•
	Modes: Types: SingleLine.Text, SingleLine.TextArea, Multiple	
	Use this control to visualize the related records in a single view Agreementation records in a single view Additional Additiona Additional Ad	

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)



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 \rightarrow Customizations \rightarrow Customize the Entity.
- 2. Select the entity from Entities component.

Account		
Solution Default Solution	General Primary Field	Controls
Components	Entity Definition	
Account	Display Name *	Account
🖼 Forms 📅 Views	Plural Name *	Accounts
Charts	Name *	account
Fields 🖷 Keys	Primary Image	Default Image
Carl 1:N Relationships	Color	#794300
N:1 Relationships	Description	Business that represents a customer
Business Rules	Areas that display this ent	lity
Dashboards	Sales	×.

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

Account 🛃 🛃 🖓 Account	25				
olution Default Solution	Type: All			•	
Components	😋 New 1-to-Many Relationship 🛛 🗙	More Actions 👻			
Account	Schema Name 🛧	Primary Entity	Related Entity	Type of Behavior	Field Name
🖃 Forms 🔛 Views 😭 Charts	account_actioncard	Account	Action Card	System	Regarding
Fields	account_activity_parties	Account	Activity Party	System	Party
a 1:N Relationships	Account_ActivityPointers	Account	Activity	System	Regarding
N:N Relationshi Messages	Account_Annotation	Account	Note	Parental	Regarding
Business Rules	Account_Appointments	Account	Appointment	Parental	Regarding
Dashboards Account Project Pri	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				Working o	on solution: Defau	It Solution
Account to Appointm	General					
la Common ■ Information	Relationship Definition					*
a	Primary Entity *	Account 🔻	Related	I Entity*	Appointment	T
+	Name*	Account_Appointments			, pp site in a lite	_
	Searchable	Yes				T
t	Hierarchical	No				T
5						
	Lookup Field					- 1
	Display Name *	Regarding	Name '	ŧ.	regardingobjecti	id
p	Field Requirement *	Optional T				_
5	Description	Choose the record that	the appoin	tment relates to.		
-						
Power Apps						
File 🚽 😹 Save and Close	Show Dependencies	Solution Laye	ers 🛛 😭	Managed Properties	5	🕜 <u>H</u> elp 🔹
Relationship				Working on s	solution: Defaul	t Solution
Contact to Account						
4 Common	General					
🕞 Information	Relationship Definition					
	Primary Entity *	Contact 🗸	Relat	ed Entity *	Account	~
	Name *	account_prima	ry_contact			
	Searchable	Yes				~
	Hierarchical	No				~
		No				~
	Lookup Field		+ N/	- *		
	Lookup Field Display Name *	Primary Contac		e *	primarycor	
	Lookup Field Display Name * Field Requirement *	Primary Contac Optional 🗸				ntacti
	Lookup Field Display Name *	Primary Contac Optional 🗸	mary conta	e* ict for the account to		ntacti

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.

Contact to Invoi	ice				Working on solution: D	efault Solution
Common	General					
😋 Information	Current Entity					
	Entity Name *	Contact				\sim
	Display Option *	Do not Display	\sim	Custom Label *		
	Display Area *	Details	\checkmark	Display Order *	10,000	
	Other Entity					
	Entity Name *	Invoice				\sim
	Display Option *	Do not Display	\sim	Custom Label *		
	Display Area *	Details	\sim	Display Order *	10,000	
	Relationship Definition			_		
	Name *	contactinvoices_as	sociation			
	Relationship Entity Name *	contactinvoices				
	Searchable	Yes				~

5. Copy this name in comma separated format in properties of the **Map My Relationships** control.

Set parameters to bind Relationships

After acquiring 'Relationship Schema Names', you are now ready to set parameters to bind Relationships.

Here are the steps for the same:

• Click on 'Map My Relationships' text field --> Go to Controls --> Select Map My Relationships control.

Display	Formatting	Details	Events	Business F	Rules Con	trols		
Contr	ol			Web	Phone	Tablet		
Text E	Box (default)			۲	۲			
Мар	My Relationship	s Control		0	\bigcirc	0	×	
Prope	erty		Value					•
Field	*			apmyrelation	ships			•
Field Map	* My Relationship			apmyrelation	ships		Ø	•
Field Map One	*	nships		apmyrelation	ships		0 0	•
Field	*	Control		apmyrelation	ships		ß	•

• Go to **One to Many Relationships** --> Click on **edit** button.

Display	Formatting	Details	Events	Business Rul	es Contro	bls			
Contro	ol			Web	Phone	Tablet			
Text B	ox (default)			۲	۲	۲			
Map N	/ly Relationship	s Control					×		
Add Co Map N Proper	ly Relationships	s Control —	Value					•	
Map N Proper Field *	ty Relationship: •			apmyrelationsl	hips		0	•	
Map M Proper Field * Map M	ly Relationship: r ty	o Control		apmyrelationsl	hips		0	•	
Map M Proper Field * Map M One to	fy Relationships r ty My Relationship	o Control nships		apmyrelationsl	hips		0	•	
Map M Proper Field * Map M One to Many	ly Relationships r ty My Relationship o Many Relation	o Control nships nships		apmyrelationsl	hips		0	•	

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

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Configure P	roperty "One	e to Many	/	×
Bind to a static	c value			
SingleLine.Text	✓ Accord	ount_Appointments	, Account_Phonec	
	C 11			
 Bind to a value 	e on a field		~	
Comma seperated I	list of one to many re	ationship schei	ma name	
		OK	Reset	

7. Repeate the above step for the other properties and fill the details.

Control Web Text Box (default) O Map My Relationships Control Image: Control Contro Control Control Contro Control Contro Control Contro Contr	Phone O	Tablet	×	
Map My Relationships Control Add Control Map My Relationships Control		•	×	
Add Control Map My Relationships Control	۲	۲	×	
[–] Map My Relationships Control				
Property Value				
Field * new_mapmyrelation	ships			
Map My Relationship Control			Ø	
One to Many Relationships Account_Appointme	ents, Account_	Phone	Ø	
Many to One Relationships account_originating	_lead, accoun	t_prim	Ø	
Many to Many Relationships			Ø	-

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.

SingleLine.Te				
	(t	✔ 0		
Enter 0 for Yes	alue on a fie		es (0)	~

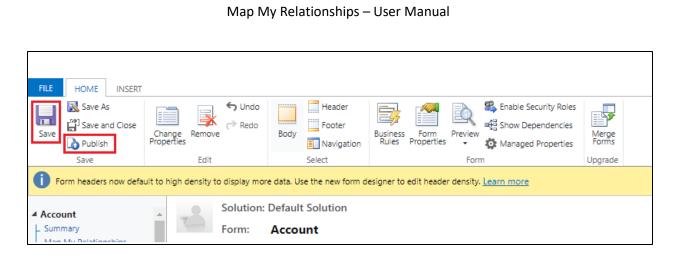
8. Select the device where the control should be displayed. Click 'OK' to save changes.

splay Formatting	Details Events	Business Rule	es Contro	ols		
Control		Web	Phone	Tablet		
Text Box (default)		\bigcirc	\bigcirc	0		
Map My Relationships C	Control	۲		۲	×	
Add Control						
Man My Polationshirs C	ontrol					
Map My Relationships C	ontroi					
Property	Value					. [
Field *	new_m	napmyrelationsł	nips			. [
Map My Relationship Co	ontrol				Ø	
One to Many Relationsh	nips Accou	nt_Appointmen	ts, Account_f	hone	0	
Many to One Relationsh	nips accour	nt_originating_l	ead, account <u></u>	_prim	Ø	
Many to Many Relations	ships				Ø	
One to Many Relationshi Compatible types: Single Comma seperated list of	Line.Text, SingleLine					

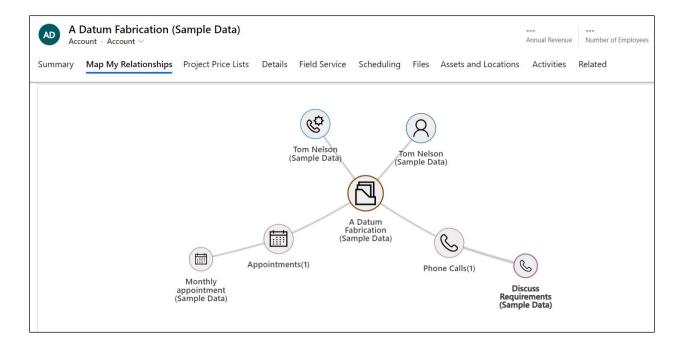
9. Go to 'Display' field properties and uncheck 'Display label on the form'.

Field Properties 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	

10. Save form and publish customizations.



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



12. 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.

Dynamics 365 \checkmark Settings	> Му Аррз		
▲ You are using apps designed for the	e legacy web client. For best results, u	pdate your apps to Unified Interface.	
✓ Search my apps			
▼ Published Apps (12)			
\triangleright	(d		V
 Dynamics 365 — custom Provides access to the full suite of capabilities, including administration	 Connected Field Service Use Connected Field Service to monitor connected devices to make	 Customer Service Empower agents to manage cases and allow service managers to set	 Customer Service Hub A focused, interactive experience for managing your customer service.
Microsoft Dynamics 365 11/25/2019 WEB	Dynamics 365	Dynamics 365 WEB	Default Publisher for crmworks48 10/13/2019 UNIFIED INTERFACE
\bigcirc	÷.	₽	品
 Field Service	 Map My Relationships	 Project Resource Hub	 Project Service
Field Service allows organizations to deliver intelligent, world class field	Visualize Entity relationships in a single view. Navigate easily from	Project Resource Hub Module	Project Service Automation Application.
Dynamics 365 UNIFIED INTERFACE	Default Publisher for crmworks48 11/15/2019 UNIFIED INTERFACE	Dynamics 365 UNIFIED INTERFACE	Dynamics 365 UNIFIED INTERFACE

Image: Second Secon			
=		\leftarrow 🖬 Save 🔛 Save & Close + New 🔊 Flow \vee	
命 Home		New Entity Configuration	
C Recent	\sim		
🖈 Pinned	\sim	General	
Settings			
@ Entity Confi	igurations	Name *	Entity Relationships
License Reg	gistration	Entity •Select •	
		Set As Default No	
		Entity Node Setting	
			<i>b</i> ₃
		Auto Expand Map No	

- **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.
- Auto Expand Map: Select 'Yes' to automatically expand nodes on Mind Map view.
- Entity Relationships: The subgrid of 'Entity Relationships'

	Map My Relationships – User Manual	
Dynamics 365	Aap My Relationships	Try the new look $igodot$ $igodot$
=	$\leftarrow \ \square' \ \blacksquare \ {\sf Save} \ \textcircled{B} \ {\sf Save} \ \& {\sf Close} \ + {\sf New} \ \boxtimes \ {\sf Flow} \ \lor$	
 G Home (¹) Recent ✓ 	New Entity Configuration - Unsaved	
A Home A Home A Recent Pinned Beneral Settings I License Registration Entity* Account (Account) Set As Default No		
Settings		Futite Delationships
Entity Configurations	Name * Account-Pre Sales Process	Entity Relationships
	Entity • Account (Account) *	
	Set As Default No	
	Dynamics 365 Map My Relationships Try the new look C Home Home Recent Pinned General Intity Configurations License Registration Entity • Account (Account) x* Intity Relationships	
	Entity Node Image Entity Image	
	Allowed Actions × Appointment (Appointment) ×	
	Na	
	Yes	

2. 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.

count - Pre Sale ity Configuration neral Related	s Process					
Name	* Account - Pre Sales Process		Entity Relationships			:
Entity	• Account (Account)	×	✓ Relationship Type ∨ Name ↑ ∨	+ 0]
Set As Default	No		E No data avai	×.	Export Entity Relationships	< < : 1
itity Node Setting				毘	See associated records	
Entity Node Image	Entity Image					
Allowed Actions	× Appointment (Appointment)	x *				

lew Entity Relations	hip			
ieneral				
Relationship Type *	One-to-many		Entity Configuration	* 🖾 Account - Pre Sales Process
Relationship	Select	T	Child Configuration	
Node Settings			Cluster Settings	
Node Settings Relationship Node Image	Entity Image		Cluster Settings Group By	Select
Relationship Node	Entity Image			Select *

- **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.
- **Default View Filter:** Choose the default view for the relationship map.

Node Settings		
Relationship Node Image	Entity Image	
Default View Filter	All Contacts	×
Allowed Actions	Select	*

- **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:

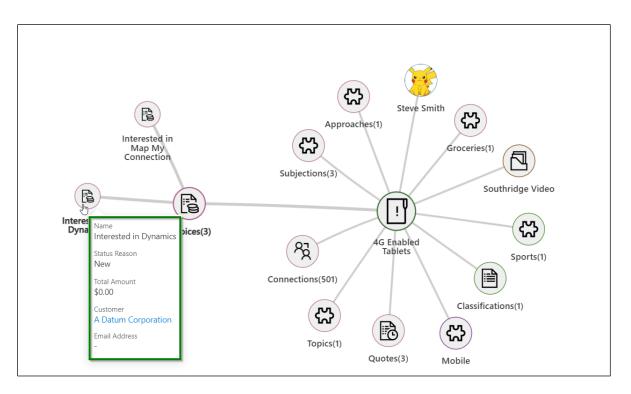
View selected in the relationship configuration -

neral Related	
lode Settings	
Relationship Node Image	Entity Image
Allowed Actions	× Appointment (Appointment) ×
View to show fields on Tooltip	Active Invoices

Columns present under 'Active Invoices' view -

Active Invoices 🗸				Search this
/ Name \uparrow \checkmark	Status Reason \smallsetminus	Total Amount \smallsetminus	Customer \lor	Email Address \checkmark
Interested in Alerts4Dynamics	New		\$0.00 Adventure Works Electroni	ics
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 -

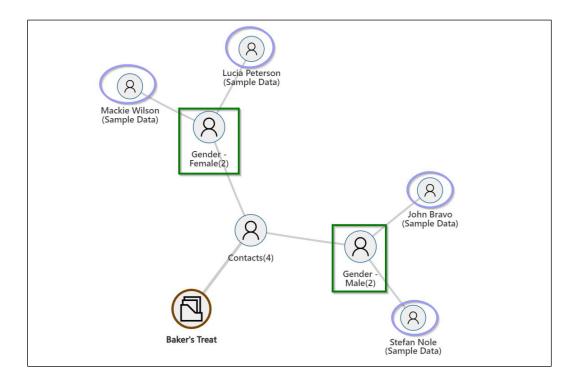


- **Child Configuration**: A list of Entity Configurations will be available. Select one such configuration to further drill down through the relationship and see associated entity records.

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_ac Entity Relationship	counts			Owner 12/28/2020 5:28 PM Greated On
General Related				
Node Settings			Cluster Settings	
Relationship Node Image	Entity Image		Group By	Gender (gendercode) ×
Allowed Actions	Select	*	Measure	Credit Limit (creditlimit)
View to show fields on Tooltip	Select	·	Aggregate Type	SUM
			Aggregate lype	SUM

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



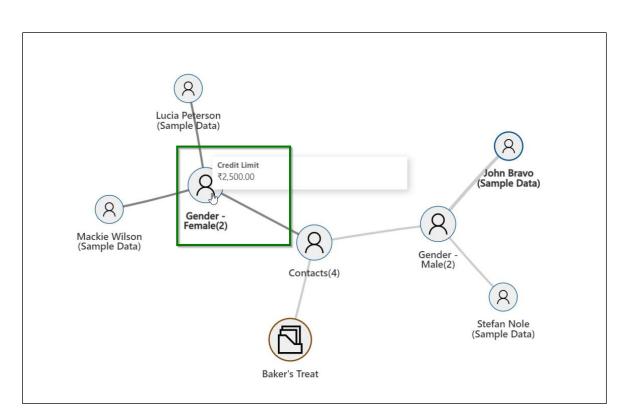
Measure and Aggregate Type: A list of fields of the related entity. Select a field, the selected field will be displayed as a tooltip of the grouped node with aggregation. This will measure the selected

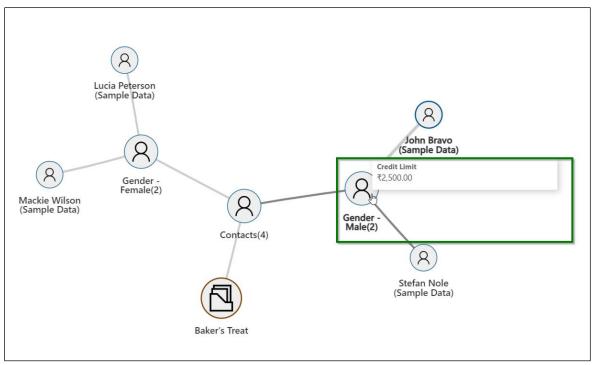
field in the relationship configuration and calculate the value based on the option chosen as an aggregate type Let's consider, there are total 4 contacts with the credit limit values as below: Contact 1 (Female) – Rs. 1,000 Contact 2 (Female) – Rs. 1,500 Contact 3 (Male) – Rs. 500 Contact 4 (Male) – Rs. 2,000

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

contact_customer_ac Entity Relationship	counts				Owner	12/28/2020 5:28 PM Created On
General Related						
Relationship	contact_customer_accounts(contact) ×	•	Child Configuration			
Node Settings			Cluster Settings			
Relationship Node Image	Entity Image		Group By	Gender (gendercode)		× [*]
Allowed Actions	Select	*				
			Measure	Credit Limit (creditlimit)	× *
View to show fields on Tooltip	Select	v				
i conte			Aggregate Type	SUM		

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





After filling all the respective fields, click on **Save**.

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portunity_custon	ner_accounts - Saved	Jack M 2/23/2022 5:54 PM Owner Created On	
eneral Related			
Relationship Type Relationship *	* One-to-many opportunity_customer_accou × *	Drill Down Settings	
🗄 Node Label	Opportunities		
Use Custom Label	No	Cluster Settings Group By Status (statecode) × *	
Relationship Node Image Default View	Entity Image	A Node Label Status-{value}	-
Node Settings Relationship Node		Group By Status (statecode) *	
Image Default View Filter	Entity Image My Open Opportunities x *	A Node Label Status-{value} Use Custom Label No	
Allowed Actions	× Appointment (Appointment) v	Measure Est. Revenue (estimatedvalue) ×	
View to show fields on Tooltip	Opportunities I Follow x *	Aggregate Type SUM	
toorup		Use Custom Label No	

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.

	Web O	Phone O	Tablet O O	×	
		•	۲	×	
				~	
Value					^
new_mapmyrelationships					
Account	t - Pre Sales Pr	ocess (Single	Line	Ø	I
Account	t_Emails, Acco	unt_PhoneCa	lls (Si	Ø	
account	t_originating_le	ead, account_	prim	0	1
				Ø	+
onfigurat	ion or fill in th	e details. If sp		n control	
u n	new_ma Account Account account uration gleLine. nfigurat	new_mapmyrelationsh Account - Pre Sales Pr Account_Emails, Accou account_originating_le account_originating_le uration gleLine.TextArea, Multi nfiguration or fill in the	new_mapmyrelationships Account - Pre Sales Process (Single Account_Emails, Account_PhoneCa account_originating_lead, account_ uration gleLine.TextArea, Multiple nfiguration or fill in the details. If sp	new_mapmyrelationships Account - Pre Sales Process (SingleLine Account_Emails, Account_PhoneCalls (Si account_originating_lead, account_prim aration gleLine.TextArea, Multiple	new_mapmyrelationships Account - Pre Sales Process (SingleLine Account_Emails, Account_PhoneCalls (Si account_originating_lead, account_prim aration gleLine.TextArea, Multiple nfiguration or fill in the details. If specified then control

		Map M	y Relationships -	– User Manual		
Power Ap	ps					
FILE HOME INSERT						
Save As Save and Close	Change Propertie		Body Header Body Navigation	Business Form Preview Rules Properties	Enable Security Roles Show Dependencies Managed Properties	Merge Forms
Save		Edit	Select	Form		Upgrade
Form headers now defa	ult to high	n density to display mo	re data. Use the new form d	lesigner to edit header density. <u>Lear</u>	<u>n more</u>	
 Account Summary Project Price Lists Map My Relationships 		Solution: Form:	Default Solution Account			Field Explorer Filter All Fields Only show unused fields
Details Field Service		·				Account Number
Scheduling	•	Map My Relation	ships			Account Rating
Common A Playbooks		Section			<u>'</u>	📒 Address 1: Address Type
Activities		Map My Rel			-	Address 1: City
Social Profiles			Publishin	g customizations		Address 1: Country/Region
Sontacts						Address 1: County
🛃 Connections		Details				📒 Address 1: Fax
Documents		COMPANY P				Address 1: Name
Documents		Industry Indust	try Contact Method	Preferred Me Currency Cur	rrency	Address 1: Post Office Box

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 <u>here.</u>

- 1) Firstly, navigate to **Map My Relationship** \rightarrow **Entity Configuration** \rightarrow **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.

eral Related	
Name	* Account Child Connection
Entity	* Account (Account) × *
Set As Default	Νο
ntity Node Setting	
Entity Node Image	Entity Image

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).

ccount_connecti ntity Relationship ieneral Related	ons1			Owner Owner
Relationship Type	* One-to-many		A Entity Configuration	* 🖾 Account Child Connection
Relationship	account_connections1(connection)	×	Use Default Configuration	Yes
Node Settings			Cluster Settings	
Relationship Node Image	Entity Image		Group By	Select
Allowed Actions View to show fields		x × ×	Measure	Select
count Child Conne	ction			Owner 12/4/2020 10:31 AM Created On
Name *	Account Child Connection	Entity Rela	tionships	
Entity *	Account (Account)	✓ Relations One-to	nip Type ~ Name ↑ ~ -many account_connections1	Entity Configuration V Created On Account Child Connection 12/4/2020
Set As Default	No	4		
ntity Node Setting Entity Node Image	Entity Image			
Allowed Actions	× Appointment (Appointment) × *			

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.

eral Related		
Name	* Associated account records of conta	act connection
Entity	* Contact (Contact)	×
Set As Default	Yes	
tity Node Setting		
Entity Node Image	Entity Image	

Relationship configuration:

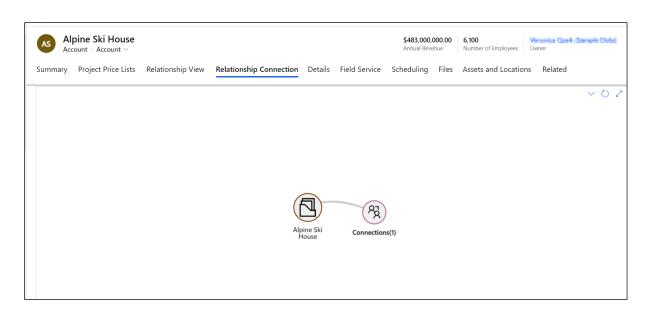
- **Relationship Type:** One to Many.
- **Relationship Type:** account_primary_contact(account).
- **Relationship Node Image:** As required.
- Allowed Actions: As required.
- View to show fields on Tooltip: My Active Accounts.
- **Child Configuration:** Leave this blank since we don't want to see any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

		Owner Created On
General Related		
Relationship Type	* One-to-many	A Entity Configuration * 🗃 Associated account records of contact connection
Relationship	account_primary_contact(account) ×	Child Configuration
Node Settings		Cluster Settings
Relationship Node Image	Entity Image	Group BySelect
Allowed Actions	× Appointment (Appointment) ×	
		MeasureSelect •
View to show fields on Tooltip	My Active Accounts x *	Assessed Trans
		Aggregate Type
ssociated account r ntity Configuration Related	ecords of contact connection	Originations 12/4/2020 12:25 PM Owner Created On Entity Relationships
Name	Associated account records of contact connection	
Entity	Contact (Contact) ×	✓ Relationship Type ∨ Name ↑ Entity Configuration ∨ Created On ∨ One-to-many account_primary_contact Associated account records c 12/5/2020
Set As Default	Yes	

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

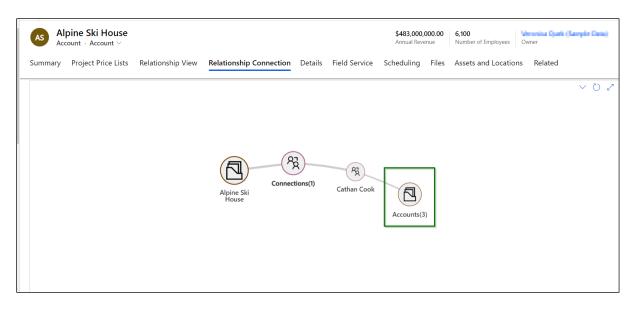


5) Double click on **'Connections'** to expand it and it will show a connection record.

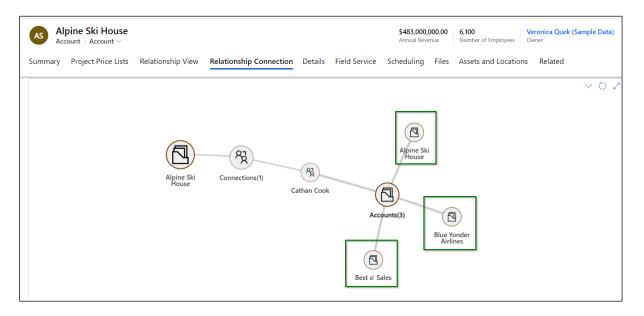
AS	Alpine Ski House					\$483,000 , Annual Reve			wner	Sample	Deno
Summa	ary Project Price Lists	Relationship View	Relationship Connection	Details	Field Service	Scheduling	Files	Assets and Locations	Related		
										\sim	02
						තී an Cook					
				(82						
				Conn	ections(1)						
			(Ē	I							
			Alpir Ho	ne Ski ouse							

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



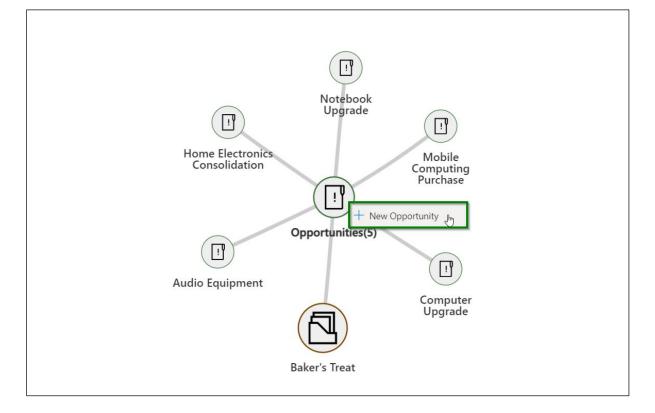
7) Again double click on 'Accounts' to expand it and it will show the associated account records of the contact connection record 'Cathan Cook'.



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

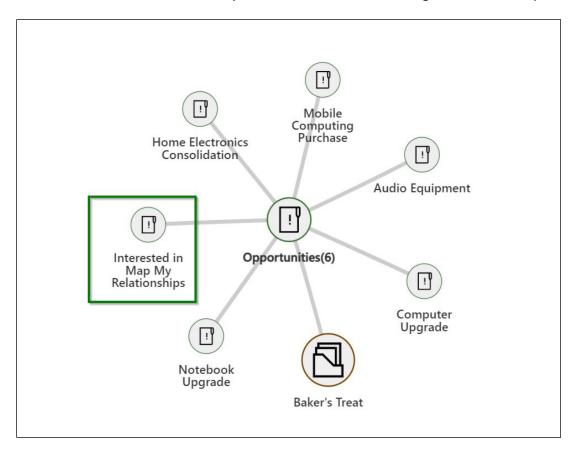
User is now provisioned to be able to quickly create a new entity record through the relationship view.



It will open up a quick create form.

sales Hub	Quick Create: Opportunity	×
← 🔋 🖶 Save & Close + New 🖧 Open Org Chart 🗅 Deactivate 😤 Connect ∨ ቹ Add to Baker's Treat Account - Account -	Details Topic * Interested in Map My Relationships	*
Summary Project Price Lists Relationship View Relationship Connection Trial View Details Field Servi	Order Type ⁺ Item based	
	Contact	
	Account	
Home Electronics Mobile Consolidation	Contracting Unit *	-
Consolidation Computing Purchase	Budget Amount	ł
(IT) Opportunities(5)	Est. Revenue	
Audio Equipment	Est. Close Date	l.
Baker's Treat	Customer Need	*
	Save and Close V Cance	el

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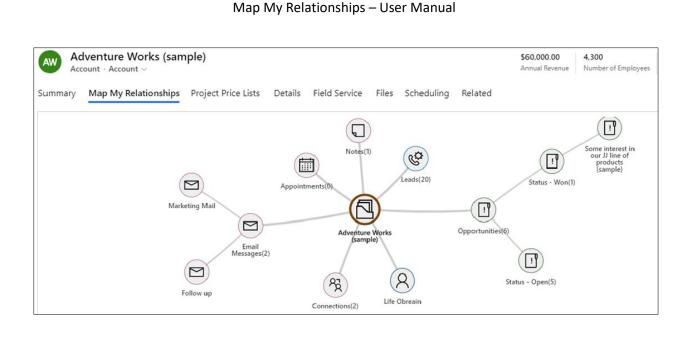


After the record is created, the newly added record will start showing in the relationship view.

Features

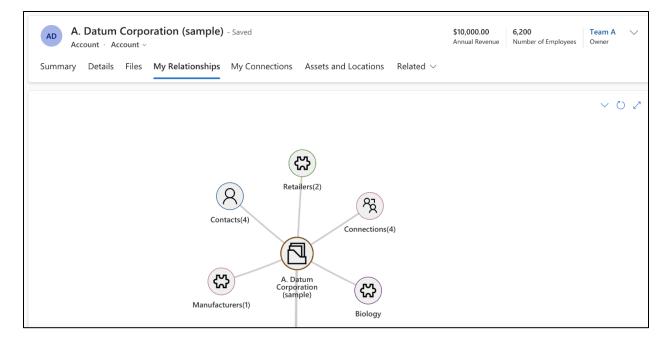
360 Degree view

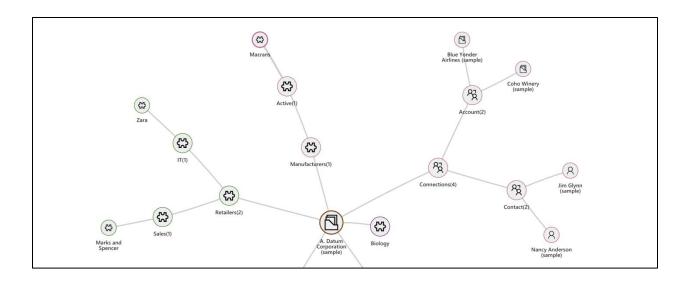
Map My Relationships provides you with 360 degree view of all important data of the record. Getting this summary of data in a single view further helps to interpret and analyze information quickly.



Auto Expand Nodes

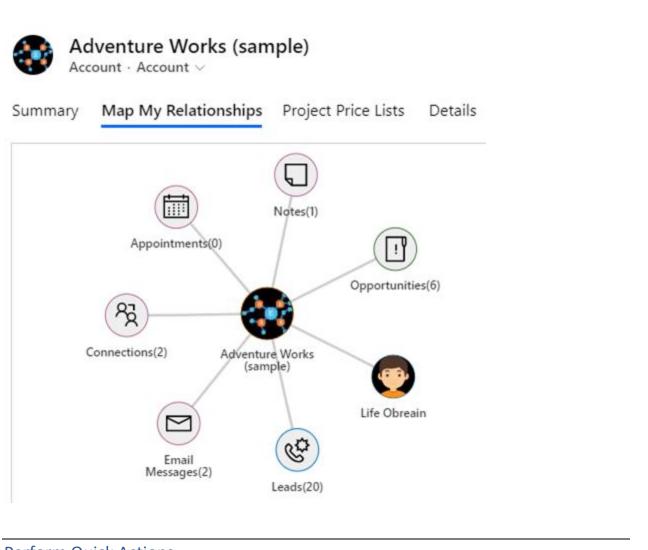
Map My Relationships app lets you auto-expand the map up to 1 level of the hierarchical record relationships on loading of the map.





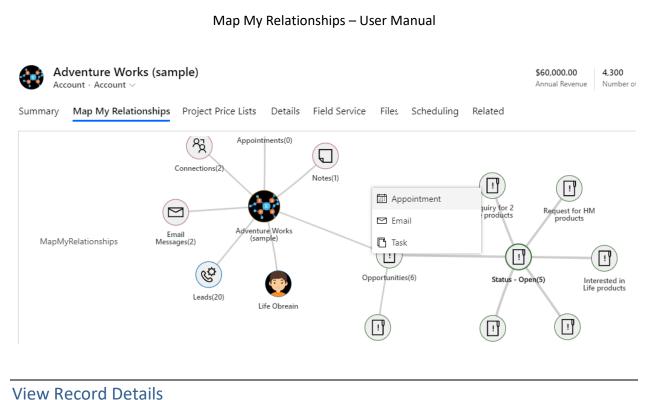
Display Images

Map My Relationships lets you to use images to identify your Dynamics 365 CRM records easily. You can set an image of your choice for respective records thus, making it easy for you to identify them quickly.



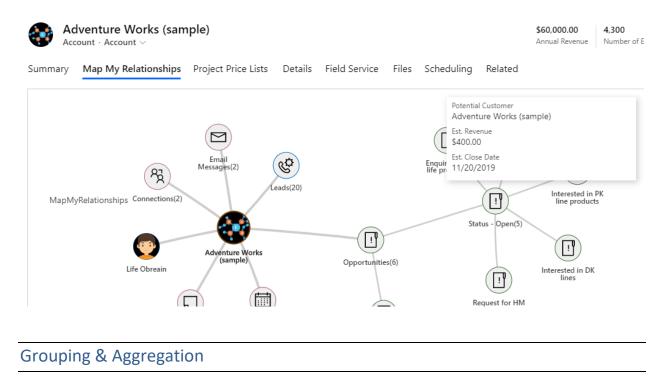
Perform Quick Actions

With Map My Relationships you can quickly create activity records like Email, Tasks, Phone calls, Appointments, etc. without navigating to respective records. You can configured any system or custom activities to allow the user to quickly create them from this view.

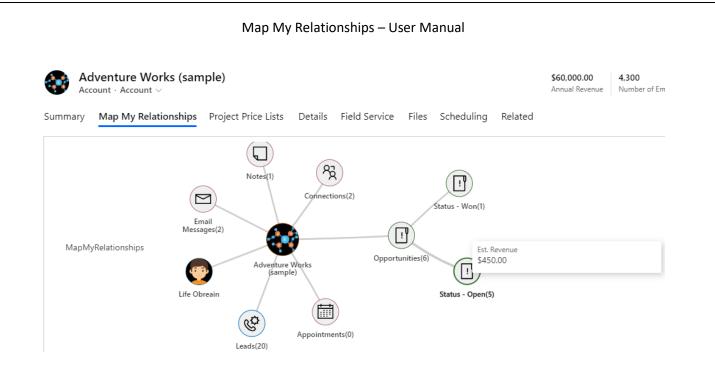


View Record Details

Map My Relationships enables users to view details of records just by hovering the cursor on the respective record.

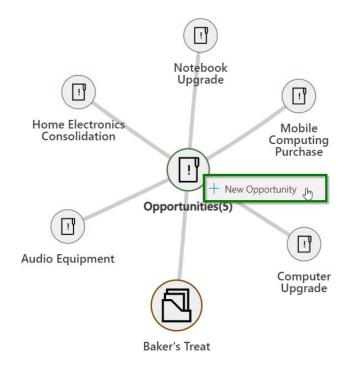


Map My Relationships provides support for viewing **aggregate values** of Dynamics 365 CRM records without the need for creating **rollup fields**.

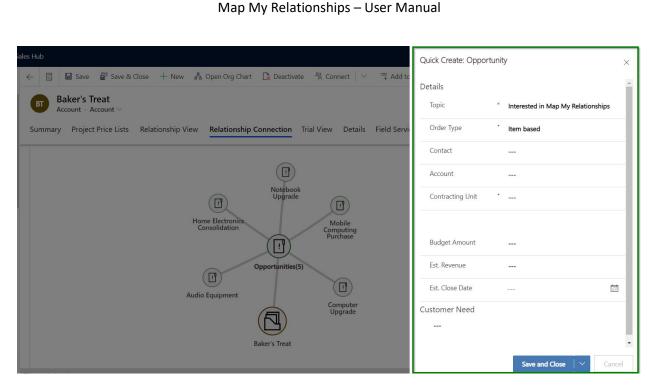


Create Associate Records

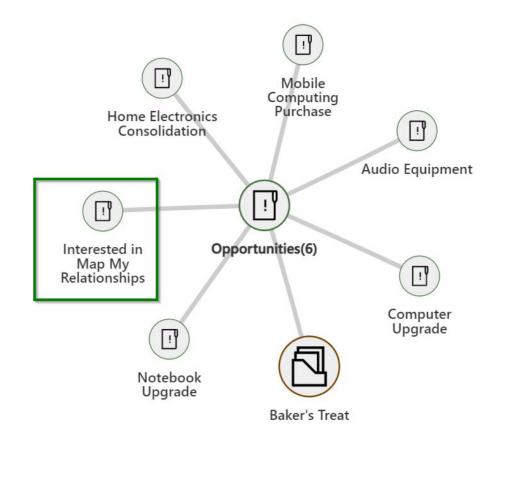
Map My Relationships gives user a provision to quickly create a new entity record which will be associated to its main record through the relationship view.



The user has to click on the entity node and it will open up a quick create form.

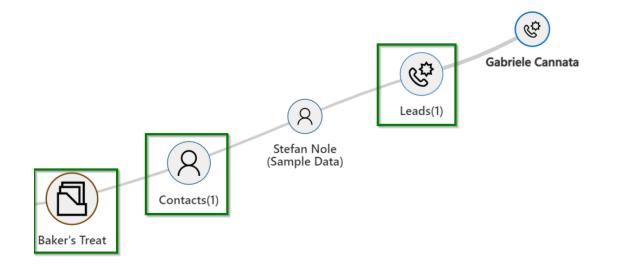


After the record is created, the newly added record will start showing in the relationship view.

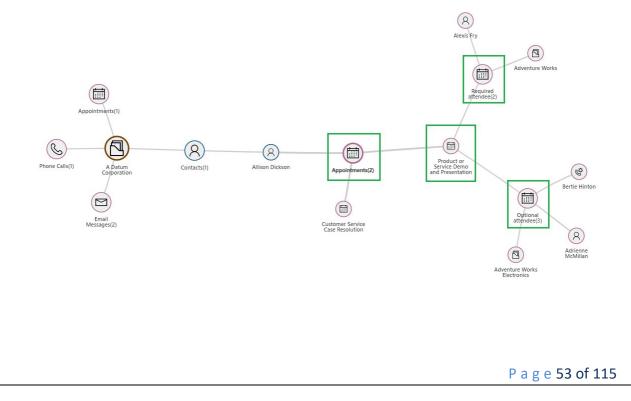


N-level relationships

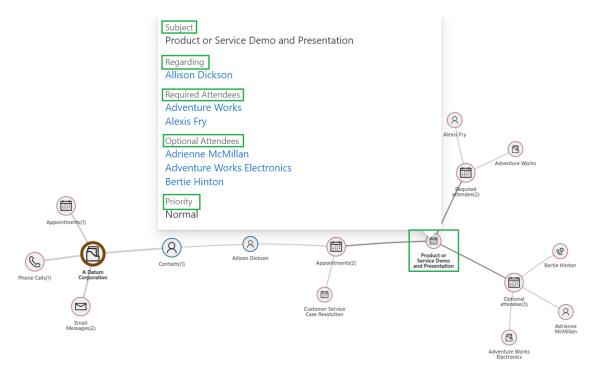
Map My Relationships enables users to drill down further through N-level relationships of a particular entity to see associated entity records.



Users can visualize attendees (Required or Optional) of an Appointment Activity in Mind Map View.



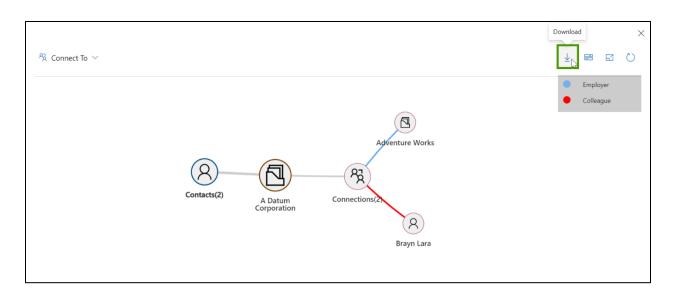
Users can also view details of the **Appointment** by simply hovering over **Appointment Activity Node** within **Mind Map View**.



Similarly, users can also visualize the **Audience** of an **"Email activity record"** in **Mind Map View** like To, Cc, etc.

Download View as an Image

You can download the image view of your relationship map with the help of Download button, as shown below.



Note: This will work smoothly when you have created an entity configuration for your map with "Entity Node Image" set as either "Entity Image" or "Record Image".

Custom Label

Map My Relationships gives provision to customize the label name in both Relationship and Connection control. User can customize the label at relationship level, group level and measure level.

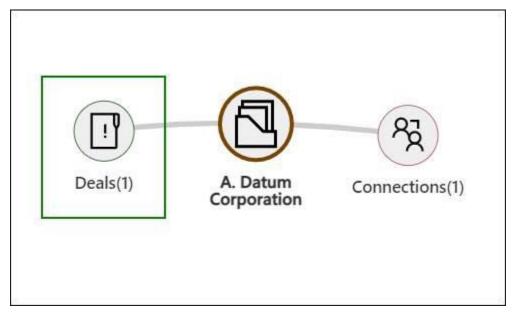
Relationship Level

'Node Label' field will auto-populate the value based on which relationship user selects. This value is the default Relationship node label.

User can customize this label by setting the **'Use Custom Label'** field to **Yes**, which shows the Custom Label field where one can add the label.

		Map My Relationships – User Manual
Relationship Type	*	One-to-many
Relationship	*	opportunity_customer_accou × *
0		0
□ Node Label		Opportunities
4 Node Label Use Custom Label		Yes

Configuration

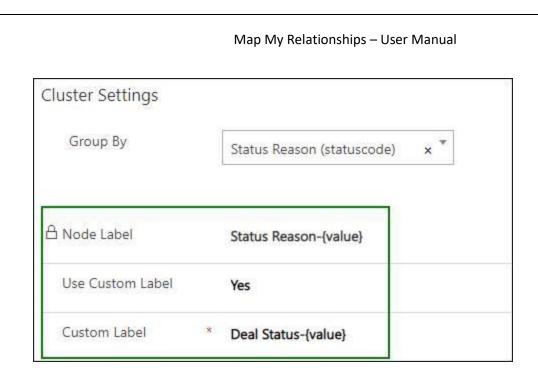


Outcome

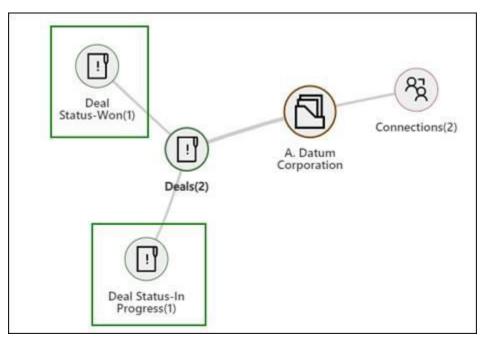
Group Level (Cluster Nodes)

Similarly, user can change the label of group / cluster nodes. After selecting a Group By field, a preview of the same is shown in the Node Label field. To add the custom label, first change the value of Use Custom Label from No to Yes. Custom Label field will appear in which user can input the value to be displayed as a label on the Group node.

Here, {value} is the value on which the grouping has been done.



Configuration



Outcome

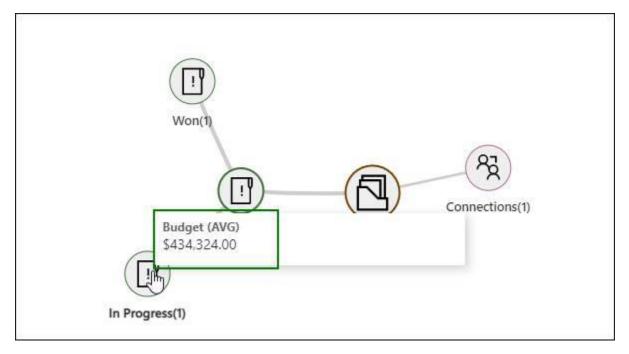
Note: Adding {value} in Custom Label is mandatory, otherwise the option name will not appear on the group node.

Measure Level (title)

In a similar manner as above, Measure title can also be customized. When user selects the field value in the Measure field, its display name (default preview label) is shown in Node Label field. User can add the custom label as shown below.

Measure		Budget Amount (budgetamo	0 × *
Aggregate Type	×	AVG	
Node Label		Budget Amount	
Use Custom Label		Yes	
Custom Label	*	Budget	

Configuration



Outcome

Filter Records

Map My Relationships gives provision to set filter on entity node views. Users can select the desired view from the dropdown and view the relationships or connections between the records. Users can set a default view while configuring the relationship map just as shown below:

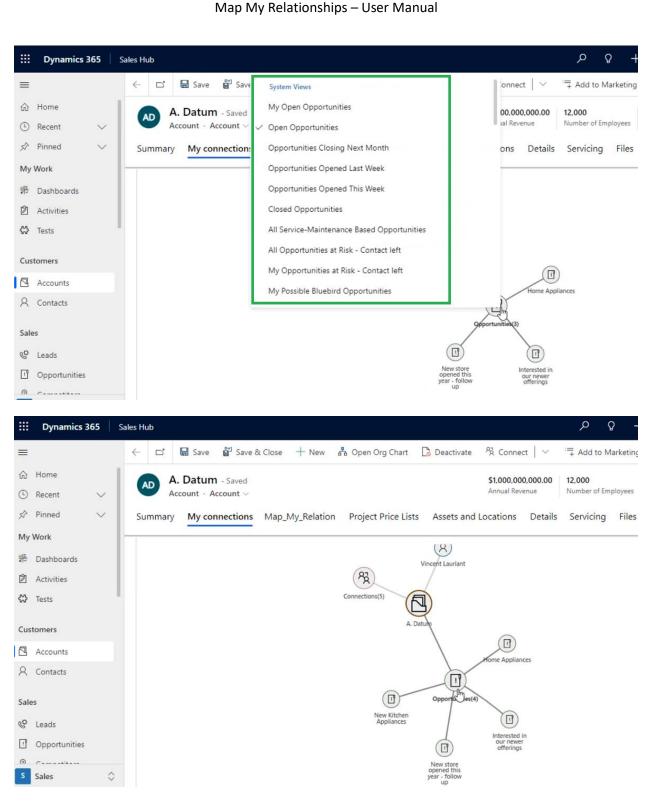
account_connections1 - Saved

Entity Relationship

General Related

Relationship Node Image	Entity Image	
Default View Filter	Select	^
	All Sales Team Members	
	Related Solutions	
	All Stakeholders	
	Associated Products	
	Active Connections	
	Related Territories	-
Allowed Actions	Select	*
View to show fields on Tooltip	Select	•

Apart from this, users can also select the desired view for any entity node within the relationship map.



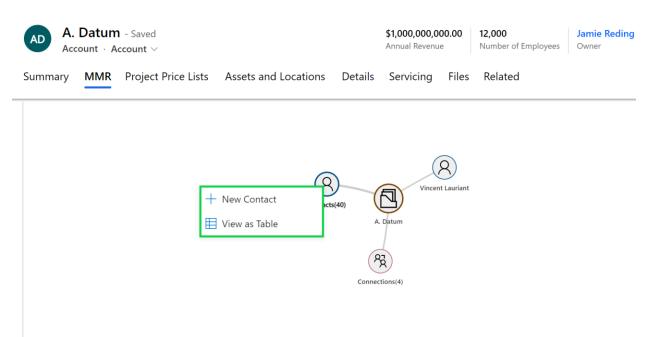
Note: This field is available only for One-to-Many and Many-to-Many relationships.

Read-Only Grid

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Map My Relationships lets users view the records in any entity node in the grid format as well. After the user has selected the desired view for the entity, they can view the same records in a read-only tabular format if needed.

The user needs to left-click on the entity node and then select the option 'View as Table' as shown below:



All the records in the selected entity node will then appear in the read-only grid format as shown in the below image.

Contacts(40)		Search thi	s view	Q	×
Full Name	Company Name	Status	Created On	Created By	
Vincent Lauriant	A. Datum	Active	8/26/2022 11:52	Alexa A	
Cathan Cook	A. Datum	Active	8/26/2022 11:53	Alexa A	
Brian LaMee	A. Datum	Active	8/26/2022 11:53	Alexa A	
Forrest Chand	A. Datum	Active	8/26/2022 11:53	Alexa A	
Andrew Dixon	A. Datum	Active	8/26/2022 11:53	Alexa A	
Eva Corets	A. Datum	Active	8/26/2022 11:53	Alexa A	
Adrian Dumitrascu	A. Datum	Active	8/26/2022 11:53	Alexa A	

Note: This is available only for One-to-Many and Many-to-Many relationships

Spider View

The Spider View in Map My Relationships lets users see a clear, visual representation of how entities are connected. It groups multiple relationships pointing to the same record (single node), reducing clutter and making the map easier to understand. This feature is especially useful when a common node appears in several relationships, providing users with a clearer view of complex connections.

Key Functionality of Spider View is as follows:

Shared Node Representation:

In Spider View, a single node can represent an entity shared across multiple relationships. For instance, a contact like "Rene Valdes" can be linked to two separate accounts, such as "A. Datum Corporation." The shared node is displayed at the center, visually showing how it connects multiple records.

Tooltip, Drill-Down, and Quick Actions:

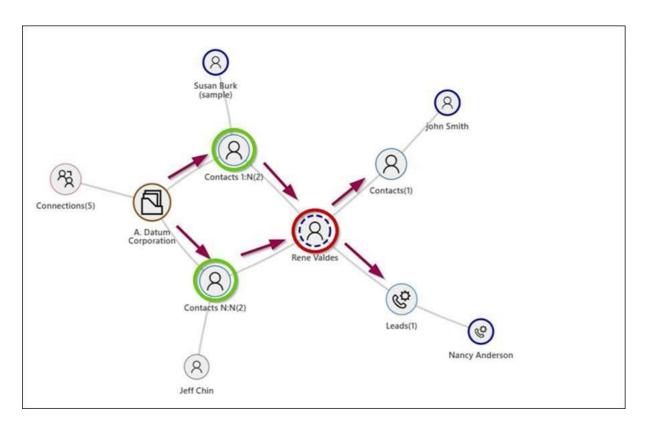
When interacting with a shared node, such as "**Rene Valdes**", the drill-down, tooltip, and quick actions will reflect the configuration of the relationship from which the node was initially expanded. For example, expanding "**Rene Valdes**" from "**A. Datum Corporation**" will show relationship details and actions specific to that account, providing a tailored and efficient user experience.

Drill-Down Behavior:

The drill-down function operates as expected when expanding a shared node (e.g., "Rene Valdes").

To collapse the child nodes, users can double-click on the root parent entity node (e.g., **"A. Datum Corporation"**) or the group node, if available, to return the expanded nodes to the central node.

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Navigating the Spider View Feature Flow:

1. Creating a Relationship:

Users can create a relationship from a root entity (e.g., "A. Datum Corporation") to a shared node (e.g., "Rene Valdes"). The shared node will appear once the relationship is established.

2. Viewing the Spider Layout:

In Spider View, relationships are displayed in a radial layout, showcasing the parent nodes and their child connections for a clear visual representation.

3. Interacting with the Node:

Upon selecting a shared node, users can interact with tooltips and quick actions, which are configured based on the relationship from which the node was expanded, offering tailored functionality.

4. Collapsing Child Nodes:

To collapse the child nodes, users can double-click the root parent entity node (e.g., "A. Datum Corporation") or the group node, if present, to restore the layout to its central node view.

Color Coded Connection Roles

Users can configure colors for connection roles. Once a color is set, the corresponding connection node edges will display using the selected color, providing a clear visual distinction based on the configuration.

Here are the steps to configure connection role colors:

↓ 5 8 8 Connect To Ö Technical Sales Profess t Pho ce Profess rv Professio CDMA Phone $\mathcal{P}_{\mathcal{Q}}$ 1 4G Enabled Southridge Video Southridge Video Abraham McCormick

1. Click on the **Settings** Icon in the Map My Connections map interface.

Note: The Settings Icon is visible only to users with the **System Administrator** or **MapMyRelationship Administrator** role. Only users with these roles can configure connection role colors.

2. After clicking the Settings icon, the configuration interface will appear.

Map My Relationships – User Manual

Connect To		Dies Colour Configuration ction roles to view it on the Map My Connect			×		3 語 () () Technical Sales Profess Account Manager
	Category	Connection Role	Colour	Actio	ons	•	Service Professional
	Business	Employee		Ø	۱.	•	Delivery Professional
	Sales Team	Account Manager		Ø	<u>ا</u>		
	Sales Team	Delivery Professional		0	١		
	Sales Team	Service Professional		Ø	١		
	Sales Team	Technical Sales Professional		Ø	1		

3. To create a new connection role color configuration, click on the **New** button.

+ New Add a	ection roles to view it on the Map My Connec new colour configuration.			Technical Sales Profes Account Manager
Category Business	Connection Role	Colour	Actions	Service Professional Delivery Professional
Sales Team	Account Manager		2 🖻	
Sales Team	Delivery Professional		Ø 🛍	
Sales Team	Service Professional		Ø 🛍	
Sales Team	Technical Sales Professional		0 🖻	

4. Clicking the New button will add a new row to the configuration list. In the new row, select the desired Connection Role Category from the dropdown menu. Based on the selected category, choose the appropriate Connection Role from the dropdown, which will display only the roles available under the selected category.

				_		
Connect To		les Colour Configuration tion roles to view it on the Map My Connec		×	7	
	+ New					 Technical Sales Profess Account Manager
	Category	Connection Role	Colour	Actions		Service Professional
	Business	Employee Champion 🖑	. •	Ø		Delivery Professional
	Sales Team	Decision Maker		Ø 🗓		
	Sales Team	End User Economic Buyer		0 Ē		
	Sales Team	Stakeholder		0		
	Sales Team	Influencer Technical Buyer	•	Ø 🗓		
	Stakeholder	 ✓ Select Connection Role 		E ×		

5. Click on the **Color Box** to open the color picker.

Category Connection Role Colour Actions Business Employee Image: I		Roles Colour Configuration onnection roles to view it on the Map My Connec			×		⊻	Technical Sales Pro
Business Employee Image: Sales Team Account Manager Image: Sales Team Delivery Professional Image: Sales Team Service Professional Image: Sales Team Technical Sales Professional Image:	Category	Connection Role	Colour	Act	ons		•	Service Profession
Sales Team Delivery Professional Image: Comparison of the second of	Business	Employee		Ø	1		•	Delivery Professio
Sales Team Service Professional Sales Team Technical Sales Professional Comparison Com	Sales Team	Account Manager		Ø	Ŵ			
Sales Team Technical Sales Professional #000000	Sales Team	Delivery Professional		Ø				
	Sales Team	Service Professional		Ø	Ŵ			
Stakeholder V Champion V 🔲 🖶 🗙	Sales Team	Technical Sales Professional	#000000	Ø				
	Stakeholder	✓ Champion ✓		Ę	×			

6. Once the color picker appears, select your desired color and click **Select**. **Note:** You cannot choose a color that has already been assigned in another configuration.

程 Connect To	Connection Roles Construction Set colour to your connection roles			× .	
	+ New				Technical Sales Profes Account Manager
	Category	Ο	Colour	Actions	Service Professional
	Business			0	Delivery Professional
	Sales Team			0	
	Sales Team			1	
	Sales Team			1	
	Sales Team	Red Green Blue		0	
	Stakeholder	Select Close			

7. After configuring the connection role and its color, click the **Save** button to apply the changes.

Connection Roles Co Set colour to your connection roles + New	DIOUR Configuration to view it on the Map My Connectio	ns control.		×	•	Technical Sales Profe Account Manager
Category	Connection Role	Colour	Action	ns	•	Service Professional
Business	Employee		0	Ū	•	Delivery Profession
Sales Team	Account Manager		0	<u>ا</u>		
Sales Team	Delivery Professional		0 [۱.		
Sales Team	Service Professional		0 [Ē		
Sales Team	Technical Sales Professional	•	Save	۱.		
Stakeholder \checkmark	Champion \checkmark			×		
			0			

8. To edit an existing configuration, click on the **Edit** button, make the necessary changes, and click **Save**.

Map My Relationships – User Manual

覺 Connect To		Dles Colour Configuration ection roles to view it on the Map My Connect		×	El El C C
	Category	Connection Role	Colour	Actions	Service Professional
	Business	Employee		D 🗓	 Delivery Professional
	Sales Team	Account Manager		Ø 🛍	
	Sales Team	Delivery Professional		Ø 🗓	
	Sales Team	Service Professional		Ø 🛍	
	Sales Team	Technical Sales Professional		Edit	
	Stakeholder	Champion		0	
				0	

onnect To		Dies Colour Configuration ction roles to view it on the Map My Connect		×	El El El C Technical Sales Profe Account Manager
	Category	Connection Role	Colour	Actions	Service Professional Delivery Professional
	Business	Employee			• Denicity Holestone
	Sales Team	Account Manager			
	Sales Team	Delivery Professional			
	Sales Team	Service Professional		Ø 🗎	
	Sales Team	Technical Sales Professional		Save	
	Stakeholder	 ✓ Champion ✓]		

9. To delete a configuration, click on the **Delete** button.

	Map M	ly Relationships – Use	r Manı	lal	
					×
考 Connect To		oles Colour Configuration ection roles to view it on the Map My Connect	ions control.	×	El El C (2) Technical Sales Profess Account Manager
	Category	Connection Role	Colour	Actions	Service Professional
	Business	Employee		0	Delivery Professional
	Sales Team	Account Manager		0	
	Sales Team	Delivery Professional		0 1	
	Sales Team	Service Professional		Ø 🗓	
	Sales Team	Technical Sales Professional		1	
	Stakeholder	Champion		Ø 🗓	
				_	

By following these steps, users can easily set colors for connection roles and enhance their Map My Connections visualization.

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

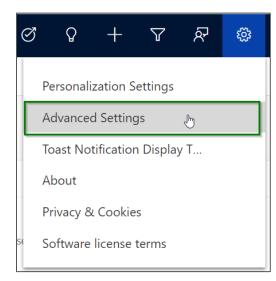
- 1. Grid/Relationships View: To allow user to see the data in grid as well as in relationship view.
- 2. Expand relationship view: To view the connection control in enlarged screen mode.
- 3. Grid Refresh: To refresh the connection control
- 4. New connection creation: These are the necessary fields 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.



\rm Dyna	mics 365 🗸	Se	ettings 🗸 Busines	ss Mana	gement		
Settings	Q						
Business		Cust	omization	Syste	em		
J Busin	ness Manageme	++	Customizations	20	Administration	∑₀	Email Configuration
Temp	plates	÷	Solutions	£	Security	ø	Activity Feeds Confi
Produ	uct Catalog	\triangleright	Microsoft AppSource	5	Data Management		Activity Feeds Rules
Ya Servi	ce Management	€∎	Plug-In Trace Log	.	System Jobs		Dynamics 365 App f
🚫 Mobi	ile Offline	\bigcirc	Solutions History	Ľ,	Document Manage	Ŷ	Sales Insights
ç¦ó Sync	Error				Auditing		
🔢 Dyna	mics 365 🗸	Se	ttings ~ Customiz	zations			
	mics 365 🗸		ttings v Customiz		Dynamics 365 for Outlook, whi	ch is retired	d as of Oct. 1, 2020 and is no lo
Dynamics 365	5 for Outlook Deprecate				Dynamics 365 for Outlook, whi	ch is retirec	d as of Oct. 1, 2020 and is no lo
Dynamics 365	5 for Outlook Deprecate	ed Ther	e are users in your organization		Dynamics 365 for Outlook, whi	ch is retirec	d as of Oct. 1, 2020 and is no lo
Dynamics 365 Customiza Which feature	5 for Outlook Deprecat Ition 2 would you like to stomize the Syster	ed Ther work v m mponents	e are users in your organization vith? in your organization. Compone	still using		ch is retirec	d as of Oct. 1, 2020 and is no lo Publishers Create, modify or delete a sc
Dynamics 365 Customiza Which feature	5 for Outlook Deprecat ation would you like to <u>stomize the Syster</u> ate, modify, or dele conships, forms, reports, lutions	ed Ther work v <u>m</u> mponents , processe	e are users in your organization vith? in your organization. Compone	still using		ch is retired	Publishers

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

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lution Default Solution	System Forms	Active Forms 🗸					
 Omnichannel Sync Config Ongoing conversation 	🔲 New 🕶 🗙 De	elete 🛛 🍕 Enable Securi	ty Roles 🛛 📑 For	rm Order 🔹 <i>浸</i> Activa	ite 🛛 🙀 Deacti	vate More Act	ions 👻
Operating Hour	Name		Form State	Form Type 🛧	State	Customizab	ole Vers 🤇
Forms	Field Se	rvice Information	Active	Main	Managed	True	8.8.0.0
Charts	Al for Sa	ales	Active	Main	Managed	True	1.0
🕎 Keys 😋 1:N Relationships	D Opportu	inity Deportuni	Active	Main	Managed	True	8.8.0.0
N:1 Relationships	Project	nformation	Active	Main	Managed	True	1.0.0.1
Messages	Opportu	unity	Active	Quick Create	Managed	True	6.0.0.0
Hierarchy Settings	Quick O	pportunity View Form	Active	Quick View F	Managed	True	9.0.0.0
 Deportunity Close Opportunity Line Opportunity Line Detail (D Opportunity Line Resource 	< 1 - 6 of 6 (0	selected)					

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

FILE HOME INSERT			
Save As Save As Save and Close Publish Save	Change Remove Redo Edit Select Form Preview Chanaged Properties		
Form headers now default	to high density to display more data. Use the new form designer to edit header density. Learn more		
▲ Opportunity	Solution: Default Solution		Field Explorer
 Summary Products My Connections 	Form: Opportunity	•	Filter All Fields Only show unused fields
 Connection Test Subjections 	My Connections		Account Manager
Relationshin View Gommon	A Section		Actual Close Date
Documents	Connections (Connected From)		Actual Revenue
Playbooks	Connections (Connected From)		Actual Revenue (Base)
Products			📒 Budget
Activities			Budget Amount (Base)
Documents			Complete Internal Review
Sonnections			Confirm Interest
Audit History			Contracting Unit
Opportunity Project			Created By
Subjections		•	New Field

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

Set Pro		2S properties.	? >	×	
Name	Formatting	Controls e name. Connections		A	
	olay label on	Connections (Connected From) the Form #F3F3F3			
Data S Specif Records Entity Default	y the prim	ary data source for this list or o Only Related Records Connections (Connected From) Active Connections	hart.		
	onal Optio Display Searc Display Index lector	:h Box	Cancel	•	

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

Set Properties	?	×
Set the List or Chart properties.		
Display Formatting Controls		
Control Controls Phone Tablet		
Read-only Grid (default)		

Add Control	:
Select a custom control from the field	d.
Kanban	
Map My Connections	
New Schedule Board	
Omnichannel Grid Control	
Map My Connections	
Modes:	Stakeholders 🔯 Connect 🗸 🗖
Types: Grid	Adrian Dumitrascu : Stakeholder vincent@adventure.com
Use this component to experience	Amie Gonzales : Stakeholder amie@test.com
enhanced capabilities of the Connections.	Stakeholder calvin@test.com
	Vincent Lauriant E Stakeholder vincent@test.com
	Add
	Add

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

5.			?	×
Web	Phone	Tablet		
\bigcirc	\bigcirc	\bigcirc		
	_		×	

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.

🗰 Dy	vnamics 365 🗸	Settings ~	Business Management					م	Q	+	∇
1 Dynami	cs 365 for Outlook Deprecated	There are users in you	ir organization still using Dynamics :	365 for Outlook, which is retire	ed as of Oct. 1, 20)20 and is no longer supported	Learn More				
L	s Management										
Which fea	ture would you like to v	work with?									
	Fiscal Year Settings Set the start date, template, ar	nd display options for the	fiscal year and fiscal period used fo	or tracking sales goals.		Goal Metrics Define and manage the kinds of	of goals that you	r organization tra	icks.		
×	Business Closures Create a list of holidays and of	ther times when the busi	ness is closed.			Facilities/Equipment Add facilities and equipment for	or service schedu	ling. Change info	ormation a	oout resou	rces or dele
	Queues Create and manage service qu record creation and updates.	ieues, and manage the m	embership of private queues. Establ	lish criteria for automatic		Resource Groups Add new groups and new men groups or group members.	nbers to existing	groups for servic	e scheduli	ng. Update	group info
<u>I</u>	Sales Territories Create new sales territories an delete territories.	ıd assign territory managı	ers. Add and remove members, mod	lify territory information, and		Services Add new services for service so	heduling. Chang	e service informa	ition and d	eactivate e	existing serv
	Sites Create new sites or office loca information, or delete sites.	tions where service opera	ations take place. Add and remove re	esources, change site		Subjects Manage the subject hierarchy t	for your organiza	tion's products,	iterature, a	ind articles	
2	Currencies Add new currencies or change	e the exchange rates for e	xisting currencies.			Connection Roles Create, edit, and detue the sta	ndard labels use	d o define conn	ections bet	ween recor	rds.

You can further sort it by category.

\Rightarrow All Active Connection Roles \checkmark								
Start Dialog More Actions 🗸 🎼 🖓 Run Workflow 🕞 Start Dialog More Actions								
Name •	Connection Role	ç						
Delivery Professional	Sales Team	Sort by Connection Role Category ACLIVE						
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).

	Bind to a static valu		ales Team,B	usiness,Far	mily	
0	Bind to a value on a	ı field				
	ter comma separated (skeholder,Sales Team,S		le catego	ories. Ex,		
				OK	F	Reset
	the List or Chart prop	perties.			ŕ	? >
Set	the List or Chart prop	oerties. ontrols Web	Phone	Tablet	1	? >
Set	the List or Chart prop	ontrols	Phone	Tablet	1	? >
Set	the List or Chart prop isplay Formatting Co Control	ontrols Web	-	-	×	? >
Set	the List or Chart prop Isplay Formatting Co Control Read-only Grid (default)	ontrols Web	0	0		? >
Set	the List or Chart prop isplay Formatting Co Control Read-only Grid (default) Map My Connections	ontrols Web	0	0		~ >
Set	the List or Chart prop isplay Formatting Co Control Read-only Grid (default) Map My Connections Add Control	web	•	0		~ >
Set	the List or Chart prop isplay Formatting Co Control Read-only Grid (default) Map My Connections Add Control Map My Connections Property	Value	 ions 	•		? >
Set	the List or Chart prop splay Formatting Co Control Read-only Grid (default) Map My Connections Add Control Map My Connections Property Dataset_Display_Key	Value Active Connect	 Intersection 	•	×	? >
Set	the List or Chart prop isplay Formatting Co Control Read-only Grid (default) Map My Connections Add Control Map My Connections Property Dataset_Display_Key Allowed Role Categori	Value Value Sales Team,Bus	ions iness,Family	•	×	*
Set	the List or Chart prop isplay Formatting Co Control Read-only Grid (default) Map My Connections Add Control Map My Connections Property Dataset_Display_Key Allowed Role Categori Allowed Entities Default Control	Value Active Connect Sales Team,Bus account (Multip	ions iness,Family ble)	· · · · · · · · · · · · · · · · · · ·	×	? >

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 -

File Publish All Customizations					0
Opportunity Forms					
Solution Default Solution	General Primary Field	Controls			
Entities Geprecated] Data Analyti	Entity Definition				
Deprecated] Dynamics Cu	Display Name *	Account	Virtual Entity		
Account Project Price List	Plural Name *	Accounts	Data Source	[None]	\sim
Action Card Action Card	Name *	account	Ownership *	User or Team	\sim
Action Card Regarding	Primary Image	Default Image 🗸 🗸	Define as an activi	ty entity.	
 Action Card Role Setting Action Input Parameter 	Color	#794300	Display in Acti	vity Menus	
Action Input Parameter	Description	Business that represents a customer or potential of	ustomer. The company that is l	nilled in husiness transactions	
Action Output Parameter		business that represents a customer or potential t	customer. The company that is i	siled in business transactions.	
Action Output Parameter					
Activity					
Activity monitor	Areas that display this ent	ity			
 Actual Actual Data Export (Depre 	Sales Settings	Service	Marketing	Training	
 Adaptive Card Configurati Address 	Process				

Here, we will enter 'account' entity.

Multiple 🗸 account	
Bind to a value on a field	
	~
nter comma separated logical name of entities. Ex, ccount,contact,systemuser.	
OK	eset

isplay Formatting Co		Web	Phone	Tablet		
Read-only Grid (default)		0	0			
Map My Connections		\bigcirc	\bigcirc	\bigcirc	×	:
Add Control						
Map My Connections	Value					
Dataset_Display_Key	Active (Connecti	ons			i.
Allowed Role Categori	Sales Te	eam,Busii	ness,Famil	y (Ø	
Allowed Entities	accoun	t (Multip	le)		Ø	
Default Control	0 (Sing	leLine.Te	kt)		Ø	
Map My Relationship	Opport	unity (Sir	ngleLine.Te	ext)	Ø	•
Allowed Entities Compatible types: Multiple Enter comma separated log account,contact,systemuse	gical nan	ne of enti	ities. Ex,			

If no specific Allowed Role Categories or Entities are defined in the Map My Connections control.

Power App	S				
FILE HOME INSERT	Chang Proper	De Remove Edit Select	Set Properties ? × Set the List or Chart properties. Display Formatting Controls		0
Form headers now defaul	lt to hi	gh density to display more data. Use the new	Control Web Phone Tablet		
Account	_	Solution: Default Solution	Read-only Grid (default)		Field Explorer
 Summary MapMyRelationship MapMyConnections 		Form: Account	Map My Connections		Filter All Fields ✓
Details Files	-		Map My Connections		Account Number
Assets and Locations Common		MapMyConnections	Property Value		Account Rating
Playbooks		ммс	Dataset_Display_Key Active Connections		Address 1: Address Type
Activities		Connections (Connected From)	Allowed Role Categor		Address 1: City
Social Profiles			Allowed Entities		Address 1: Country/Region
Contacts			Default Control 1 (SingleLine.Text)		Address 1: County
Documents					Address 1: Fax
Sonnections					Address 1: Latitude
Documents					Address 1: Longitude
Audit History					📒 Address 1: Name
Dnique indentifier f					Address 1: Post Office Box
Customer Assets					Address 1: Primary Contact Name
Conversation Partic					Address 1: State/Province
a dailyaccountkpiitems					Address 1: Street 2
Swarms		d Details	OK Cancel		Address 1: Street 3
loT Devices	Ŧ	COMPANY PROFILE	MARKETING BILLING	-	New Field

The system will display all roles and entities by default when creating a connection. As shown in the screenshots below:

Entities:

iales Hub	<u>م</u>	Create Connec	ction	×
+ cl 🖬 ten + + ten 🕆 the area 🕤 descenter. 🗇 modules 46 metropies	< 9. checkscone - E	Select Entity	Select an entity	~ *
4G Enabled Tablets - Saved Opportunity - Opportunity -	Account Est. close date	Role	Account Case Contact	
Sales Process Cualify (25 Hrs) Develop	Propose	Selection Type	Email	
Summary MapMyRelationship MapMyConnections Products Quotes Files Related \checkmark	_	Selected Record	Invoice Lead Opportunity	*
段 Connect To	+ New Cor	Description	Order Quote	
Carla Yates Garla Yates 46 Enabled 46 Enabled Tablets(5)			Task Save and Close Cane	cel

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Roles:

les Hub			ଦୁ ବ୍	Create Connec	tion
6 11 12 tare - + terr	🕈 Constantino 🚫 Chine as both	E noozen di vorterane	< Ry checksone :	Select Entity	Select an entity ~
4G Enabled Tablets - Saved Opportunity · Opportunity ·			Account Est. close date	Role	Select a role
Sales Process Active for 25 hours	Qualify (25 Hrs)	O Develop	Propose	Selection Type	Account Manager Client Success Specialist
Summary MapMyRelationship I	MapMyConnections Products	Quotes Files Related ~	+ New Cor	Selected Record	Delivery Professional Operations Manager
월 Connect To				Description	Sales Manager Sales Professional
	Aley B. Carla Yates Generation 4G Enabled 4G Enabled 4B	aker Jabez Parker			Save and Close 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**.

SingleLine.Text Bind to a value on a field	•	
Bind to a value on a field		
		~
Enter either 0 or 1.0 = Grid view	and 1 = Relationship	view.

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Display	Formatting	Controls				
Contro	ol		Web	Phone	Tablet	
Read-	only Grid (defau	lt)	\bigcirc	\bigcirc	\bigcirc	
Map I	My Connections		igodol	$oldsymbol{O}$	igodol	×
Add Co	ontrol					
Prope	/ly Connections r ty et_Display_Key	Value Active	Connecti	ons		
Allow	ed Role Categor	i Sales T	eam,Busi	ness,Famil		Ø
Allow	ed Entities	accour	t (Multip	le)		Ø
Defau	ılt Control	0 (Sing	leLine.Te:	xt)		Ø
Мар	My Relationship	Oppor	tunity (Si	ngleLine.Te	ext)	Ø
	t Control atible types: Sing either 0 or 1.0 =		nd 1 = Re	ationship	view.	

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.

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< 디 🖬 Save 🛱 Save & Close + New 🏚 Open org chart 🗋 Deac	tivate 🎕 Connect 🛛 🗢 🛱 Add to Marketing List 📑 😥 Share 🗸				
4G Enabled Tablets - Saved Account · Account · Summary MapMyRelationship MapMyConnections Details Files Astronomic	\$123.00 Annual Revenue 34 Number of Employees Image: Constraint of Employees ssets and Locations Related				
⊗ No active entity configuration found to load the map.	┿ New Connection ひ Refresh :				

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:-

Opportunity Entity Configuration General Related	Owner 12/1/2020 9:26 PM Created On
Name * Opportunity	Entity Relationships
Entity Opportunity (Opportunity) ×	✓ Relationship Type ✓ Name ↑ ✓ Entity Configuration ✓ Önd-13-ming majorportering insulgroup Deportuning
Set As Default No	One-to-many mm_opportunity_mm_bidge Opportunity One-to-many opportunity_connections1 Opportunity
Entity Node Setting Entity Node Image Entity Image	 S - 8 of 12 (0 selected) I ← ← Page 2 →

Relationship configuration:-

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opportunity_connections1	Owner Created On
General Related	
Relationship Type * One-to-many	A Entity Configuration * 🐼 Opportunity
Relationship • opportunity_connections1(con × •	Use Default Configuration Yes
Node Settings	Cluster Settings
Allowed Actions	Group By Type (To) (record2objecttypec ×
View to show fields on Active Connections *	MeasureSelect

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

Сс	onfigure Property "Map My Relati	×
٢	Bind to a static value SingleLine.Text	
0	Bind to a value on a field	
En	ter name of the Map My Relationships Configuration entity record.	
	OK Reset	

splay Formatting	Controls					
Control		Web	Phone	Tablet		
Read-only Grid (default))	0	0	0		
Map My Connections		0	0	0	×	
Add Control						
Map My Connections Dataset_Display_Key Allowed Role Categori Allowed Entities	- Sales Te	Connecti eam,Busi t (Multip	ness,Famil	y (0	
Default Control	0 (Sing	leLine.Te	ct)		Ø	I
Map My Relationship	Opport	tunity (Sir	ngleLine.Te	ext)	Ø	I
Allow to connect usin	0 (Sing	leLine.Te	(t)		Ø	
Map My Relationship Co Compatible types: Single Enter name of the Map N	eLine.Text	-		n entity r	ecord.	

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 General Related		Owner 12/1/2020 9:26 PM Created On
Name	* Opportunity	Entity Relationships
Entity	Opportunity (Opportunity) ×	Relationship Type Name ↑ Entity Configuration Many-to-many new_new_classification_oppo Opportunity Many-to-one new_new_electronic_opportu Opportunity
Set As Default	No	Many-to-many new_new_sport_opportunity. Opportunity
		One-to-many new_opportunity_new_appro Opportunity
Entity Node Setting		1 - 4 of 12 (0 selected) K \leftarrow Page 1 \rightarrow
Entity Node Image	Entity Image	

Few more relationships:-

Ent	ty Relationships			
				÷
	\checkmark Relationship Type \smallsetminus	Name ↑ ∨	Entity Configuration \smallsetminus	
	One-to-many	new_opportunity_new_groce	ı Opportunity	
	One-to-many	new_opportunity_new_subject	Opportunity	
	One-to-many	new_opportunity_new_topic_	Opportunity	
	One-to-many	opportunity_connections1	Opportunity	
•				•
5 -	8 of 12 (0 selected)		← ← Page 2	\rightarrow

Further few relationships:-

Ent	tity Relationships			
				:
	\checkmark Relationship Type \smallsetminus	Name ↑ ∨	Entity Configuration \vee	
	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)		← ← Page 3	\rightarrow

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	

t the List or Chart prop						
Display Formatting C	ontrols	Phone	Tablet			
Read-only Grid (default)	0	0	0			
Map My Connections	۲			×		
Add Control						
Map My Connections						1
Dataset_Display_Key Allowed Role Categori	Active Connecti Sales Team, Busi		h	Ø	•	
Allowed Entities	account (Multip		IY (0	11	
Default Control	0 (SingleLine.Te			0		
Map My Relationship	Opportunity (Si		ext)	0		
Allow to connect usin	0 (SingleLine.Te	ext)		0	•	
Allow to connect using Re Compatible types: SingleL Enter either 0 or 1. 0 = Ye:	ine.Text					

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

Display Formatting Co	ontrols					
Control		Web	Phone	Tablet		
Read-only Grid (default)		0	\bigcirc	0		
Map My Connections		•		$oldsymbol{O}$	×	
Allowed Role Categori Allowed Entities Default Control May My Debtership	account 0 (Singl	t (Multipl eLine.Tex	e) t)		0 0 0	l
Map My Relationship Allow to connect usin		eLine.Tex	igleLine.Te	ext)	0	Ŧ
Dataset_Display_Key						

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Power Ap	ps								
FILE HOME INSERT									0
Save As Seve and Close	Change Propertie	Remove Edit		Business Rules Properties Preview	💽 Managed Pro	lencies	Merge		
Save as Draft		ensity to display m	ore data. Use the new form d	esigner to edit header densit	y. Learn more		12		
Save this form.			n: Default Solution						
Opportunity	^						Field Exp	olorer	>
_ Summary		Form:	Opportunity						
_ Products							Filter	All Fields	~
My Connections Connection Test							Only s	how unused fields	
_ Subjections		Suggestions					Account	t Manager	
Relationship View	-						Actual C	Close Date	
▲ Common	^						Actual F	Revenue	
Documents							_		
💩 Playbooks							Actual H	Revenue (Base)	
Products		My Connections)		,		📒 Budget		
📝 Activities		Section					📒 Budget	Amount (Base)	
Documents		Connections (Con					Comple	te Internal Review	
Sonnections							Confirm	Interest	
Audit History							Contrac	ting Unit	
🌛 Opportunity Project							Created	Ву	
Subjections							Created	By (Delegate)	
💩 Groceries							Created		
🌛 Approaches							_		
opics							New Fi	or Dain Dainte	
javascript:;	••••					•	New FI	eiu	

Power App	S	
FILE HOME INSERT		Ø
Save As Save and Close	Change Remove Redo Edit Select Form Form Form Form Form Form Form Form	Merge Forms Upgrade
Fo Publish	lisplay more data. Use the new form designer to edit header density. Learn more	
A Oppo A oppo A oppo A ssociated forms, vi	e. This includes all olution: Default Solution	Field Explorer >
Sumn fields. Products My Connections	orm: Opportunity	Filter All Fields ✓ ✓ Only show unused fields
 Connection Test Subjections 	Suggestions	Account Manager
Relationship View	•	Actual Close Date
Common Documents		Actual Revenue
Playbooks		Actual Revenue (Base)
Products	My Connections	📒 Budget
Activities	Section	📒 Budget Amount (Base)
Documents	Connections (Connected From)	Complete Internal Review
🛃 Connections		Confirm Interest
Audit History		Contracting Unit
Opportunity Project		Created By
Subjections		Created By (Delegate)
Groceries		Created On
Approaches		Customar Dain Dainte
👌 Topics		New Field

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

IG Enabled Tablets			3/6/2017 Est. Close Da	\$3,257,500. Est. Revenue	00 In Progress Status
pportunity Sales Process ctive for 17 days	Qualify	De	evelop	Propos	9 se (17 D)
Summary Products My Connections	Connection Te	est Subjections	Relationship View	Latest Topics	Topics Simple
Topic*	Time	line	+ 7	Ţ≣ :	Assistant
4G Enabled Tablets	Q	Search timeline			
Contact	Enter	a note		0	No noti
Steve Smith	CL	🖄 Task modified	d by Chris Leon		Check back later
Account		Dynamics Invoice		1:07 PM 🗸	
🔁 Southridge Video		, cure			
Purchase Timeframe	SL	Send Email	ed by Spencer Low (Sam	ple Data)	Stakeholders
This Quarter		Follow up with re	•	0.40 ANA N.C	
Currency*		Closed	11/23/2020	8:49 AM ∨	

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 Connection	s Connection Test	Subjections	Relationship View	Latest Topics	Topics Simple	Simple MM
Show Chart ℜ Connect ∨ Active Connection Associate ✓ Connected To ↑ ∨		n Report 🗸 🦷	Excel Templates 🗸	🕼 Export Con	nections 🗸 🗸	tion V
A Datum Corporation		Sales Professi	onal			
Adventure Works		MMC			10.00	ala internet
Alex Simmons		Sales Professi	onal			
Allison Brown		Sales Professi	onal			

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

G Enabled	I Tablets - Saved Opportunity ~			Account Est. close date Est. revenue	
ales Process tive for 20 hours	<	Qualify (20 Hrs)	O Develop	Propose	O Close
iummary N	MapMyRelationship Ma	apMyConnections Products Q	uotes Files Related $\!$		
				+ New Connection () Refresh ∞ª Flow ∨ :
😚 Connect To					S
	Connected To 1	Role (To)	Description		
0	Alex Baker	Former Employer	fields define the nature and co	ontext of each connection within your network	
O (AS	Alex Simmon	Employer	helps users categorize and ma	anage relationships more effectively, making it e	asier to understand each entity's r.
•	Carla Yates	Sales Professional	helps clarify the purpose and	context of the connection within your network	

11) You can also switch this to relationship view.

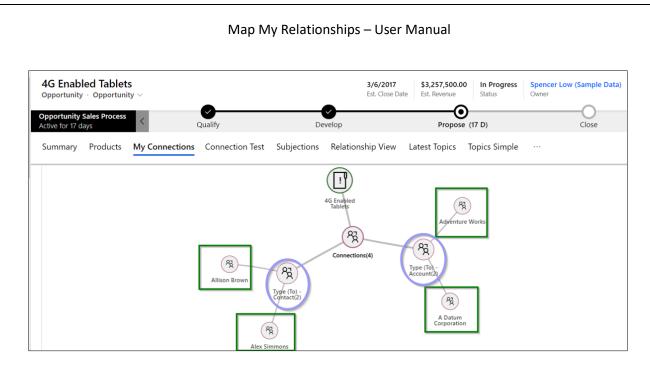
	led Table				3/6/2017 Est. Close Da	\$3,257,500.0 te Est. Revenue	0 In Progress Status	Spencer Low (Sample Data) Owner
pportunity ctive for 17 d	Sales Proces lays		Qualify	De	evelop	Propose	e (17 D)	Close
Summary	Products	My Connections	Connection Test	Subjections	Relationship View	Latest Topics	Topics Simple	 Relationships View
ියි Conr	nect 🗸							% •
	(Connected To	Role (To)		Description		Connection Nam	e
		A Datum Corporation	Sales Profe	essional	qqq		A Datum Corpora	ition
	AW	Adventure Works	MMC		AD Work		Adventure Works	
	AS	Alex Simmons	Sales Profe	essional			Alex Simmons	
		Allison Brown	Sales Profe				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.

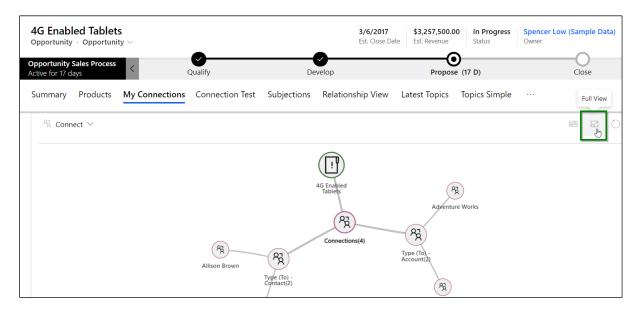
← 🗉 🖬 Save 🛱 S	ave & Close + New	Deactivate	🗊 Delete	🖔 Refresh	Export to PDF	워, Assign	🖻 Share	🖾 Email a Link	÷	
Opportunity Entity Configuration General Related							Owner			\sim
Entity Set As Default	Opportunity (Opportun	nity) × *			Relationship Type ~ One-to-many One-to-many	new, opports	nių pauju nių pauju	Entity Configurat	ion ~	
Entity Node Setting Entity Node Image Allowed Actions	Entity Image	x î intment) v		5 - 8	of 12 (0 selected)		-	K ← Pa		Þ

opportunity_connect Entity Relationship General Related	ions1		Owner 12/1/2020 9:26 PM Created On
Relationship Type	One-to-many opportunity_connections1(connection) x *	Entity Configuration	B Opportunity Yes
Node Settings Relationship Node Image	Entity Image	Cluster Settings Group By	Type (To) (record2objecttypecode) × *
Allowed Actions View to show fields on Tooltip	× Appointment (Appointment) × Active Connections ×	Measure	Select
юнир		Aggregate Type	

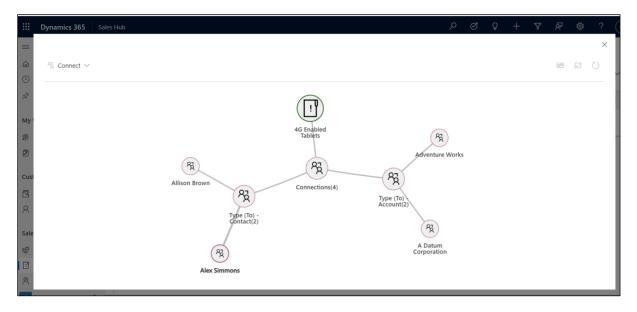
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13) Click on **'Full View'** button on the right top corner of the control to see the data in expanded screen.



Expanded mode:-



User can also refresh the control if required.

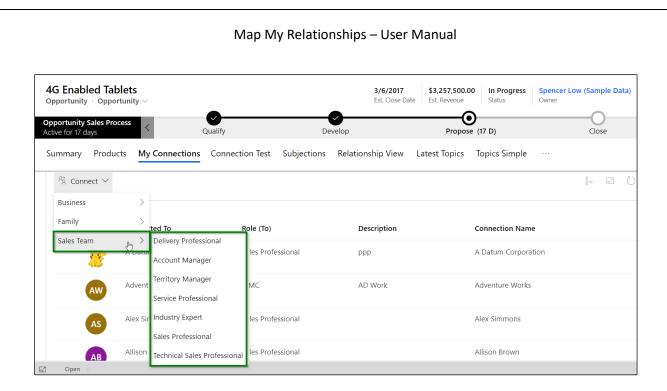
4G Enable Opportunity					3/6/2017 Est. Close Da	\$3,257,500.00 te Est. Revenue	In Progress Status	Spencer Low (Sample Data)
Opportunity S Active for 17 da		< (Qualify	De	evelop	Propose	•	Close
Summary	Products	My Connections	Connection Test	Subjections	Relationship View	Latest Topics	Topics Simple	
ିର୍ବ Conne	ect ∨							
			Allison Brown		4G Enabled Tablets	pa	AR venture Works	
				Pg Type (To) - Contact(2)	Connections(4)	And Type (To),-		
			R Alex Simmo	/		Account(2)		

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 Properti					?	×					
Display Formatting	Controls						e				
Control	Controis	Web	Phone	Tablet			c				
Read-only Grid (def	fault)	\bigcirc	0	0							
Map My Connection	ns	0			×						
Add Control											
Map My Connection	ns					_					
wap wy connection	15										
Property	Value				- 1						
Dataset_Display_Ke	y Active	Connectio	ons		-						
Allowed Role Cate		Team, Busii			0						
Allowed Entities	accou	nt (Multip	Sales Tea	m,Business	s,Family (N	Multiple)					
Default Control	0 (Sing	gleLine.Te>	tt)	6	-						
					^						
							_				
G Enabled Tablets							3/6/2017	\$3,257,500.00		Spencer Low (Sample D	Data)
oportunity · Opportunity	~	0				•	Est. Close Date	-	Status	Owner	
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ranny	ted To	Role (To)	Description	Connection Name
Sales Team	A Datum Corporation	Sales Professional	qqq	A Datum Corporation
AW	Adventure Works	ММС	AD Work	Adventure Works
AS	Alex Simmons	Sales Professional		Alex Simmons
AB	Allison Brown	Sales Professional		Allison Brown

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



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					م	Create Conne	ction	×
<	- 🔚 Save 😭	Save & Close + Nev	/ 🖒 Refresh Exp	oort to PDF 🔋 Clos	e as Won 🚫 🤇	Close as Lost	Role	Sales Professional	~
0	4G Enabled Ta Opportunity · Oppo	ortunity \sim	0	O	3/6/2017 Est. Close Date	\$3,257,5 e Est. Reven	Select Entity *	Select an entity	~
A	ctive for 17 days Summary Produ		Qualify s Connection Test	Develop Subjections Relat	ionship View	Pro Latest Topi	Selection Type	LookupRelationships View	
	$\%$ Connect \smallsetminus						Selected Record	Select a record	Q
		Connected To	Role (To)		Description		Description		
	1	A Datum Corporation	Sales Profess	ional	ррр				
	AW	Adventure Works	MMC		AD Work				
	AS	Alex Simmons	Sales Profess	ional					
•	Open	Allison Brown	Sales Profess	ional		_		Save and Close	Cancel

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

es Hub				م	Create Connec	tion
← 🔚 Save 💕	Save & Close 🕂 New 🕻) Refresh 🛛 🖻 Export to PDF	🔋 Close as Won 🛛 🚫 C	lose as Lost	Role	Sales Professional
4G Enabled Tal Opportunity · Oppo	rtunity \sim		3/6/2017 Est. Close Date	\$3,257,5 Est. Reven	Select Entity *	Delivery Professional
Opportunity Sales Pro Active for 17 days Summary Produ	Qua	lify D onnection Test Subjections	evelop Relationship View	Pro Latest Topi	Selection Type	Territory Manager Service Professional Industry Expert
発 Connect 〜					Selected Record	Sales Professional Technical Sales Professional
	Connected To	Role (To)	Description		Description	
3	A Datum Corporation	Sales Professional	ppp			
AW	Adventure Works	MMC	AD Work			
AS	Alex Simmons	Sales Professional				

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'**.

isplay Formatting	Controls				
Control		Web	Phone	Tablet	
Read-only Grid (defa	ult)	\bigcirc	\bigcirc	\bigcirc	
Map My Connection	s	$oldsymbol{O}$	igodol	•	×
Map My Connection					
Property	Value				
Property Dataset_Display_Key	Value Active	Connecti			ß
Property	Value Active pri Sales 1		ness,Famil	у (Ø

				Map M ⁱ	y Relationsl	nips – Use	r Manu	al		
Sale	es Hub						م	Create Connec	tion	×
^	\leftarrow	Save 🔛	Save & Close + New	🕐 Refresh 🛛 💀 Exp	ort to PDF 🔋 Clos	se as Won 🛛 🚫 Cl	lose as Lost	Role	Sales Professional	~
	Opportu	abled Tal	ortunity ~			3/6/2017 Est. Close Date	\$3,257,5 Est. Reven	Select Entity *	Select an entity	~
ľ	Opportur Active for Summa			Qualify Connection Test	Develop Subjections Rela	tionship View	Pro Latest Topi	Selection Type	Account Lookup Relationships View	Account
	^A ₹ c	Connect ∨						Selected Record	Select a record	Q
			Connected To	Role (To)		Description		Description		
			A Datum Corporation	Sales Profess	ional	ppp				
		AW	Adventure Works	ММС		AD Work				
		AS	Alex Simmons	Sales Profess	ional					
*	E3 Op	en	Allison Brown	Sales Profess	ional			l	Save and Close	Cancel

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.

	Controls				
Control		Web	Phone	Tablet	
Read-only Grid (default)		\bigcirc	\bigcirc	\bigcirc	
Map My Connections		$oldsymbol{O}$	$oldsymbol{O}$	$oldsymbol{O}$	×
Add Control					
Map My Connections — Dataset_Display_Key Allowed Role Categori		Connecti Team Busi	ons ness,Famil	V (D
Allowed Entities		nt (Multip		,	D
Default Control	0 (Sing	leLine.Te:	xt)		Ø
Map My Relationship	Oppor	tunity (Sii	ngleLine.To	ext)	Ø
map my teladonimp m					

Sales	Hub						م	Create Conne	ction	×
<	Save	e 💕 Save	& Close + New	🖔 Refresh 🛛 🖻 I	Export to PDF	🔋 Close as Won 🚫	Close as Lost	Role	Sales Professional	~
	4G Enabl Opportunity	· Opportun	ity \vee			3/6/2017 Est. Close Dat	\$3,257,5 te Est. Reven	Select Entity *	Account	~
P	Dpportunity S Active for 17 da Summary	ays		Qualify Connection Test		evelop Relationship View	Pro Latest Topi	Selection Type	 Lookup Relationships View 	N
	R Conn	ect 🗸						Selected Record	Select a record	P.
		Co	onnected To	Role (To)		Description		Description		
		A	Datum Corporation	Sales Prof	essional	qqq				
	(AW	dventure Works	MMC		AD Work				
	(AS AI	lex Simmons	Sales Prof	essional					
-	Open	AD AI	llison Brown	Sales Prof	essional				Save and Close	Cancel

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

Sales H	lub							م	Create Connec	tion	×
÷	🔛 S	ave	😭 Save	e & Close + New	🖔 Refresh	Export to PDF	🔋 Close as Won 🤇	Close as Lost	Role	Sales Professional	\sim
0	G Ena	ty · C	pportun	ity ~	•		3/6/2017 Est. Close I		Select Entity *	Account	~
Ac	p portunit tive for 17 ummary	days	s Process oducts		Qualify Connection 1		evelop Relationship View	Pro Latest Topi	Selection Type	Lookup	
	°Ã Co	nnect	~						Selected Record	Select a record	Q
			C	onnected To	Role	(To)	Description		Description		
		······································	A	Datum Corporation	Sales	Professional	qqq				
		AW	A	dventure Works	MMC	-	AD Work				
		AS	A	lex Simmons	Sales	Professional					
T			A	llison Brown	Sales	Professional				Save and Close	Cancel

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

\times Lookup Records Select record 🗧 🖶 Save 👹 Save & Close 🕂 New 🕐 Refresh 📾 Export to PDF 🔋 Close as Won 🚫 Close as Lost 4G Enabled Tablets 🖪 Best o' Sales ~ imes~ 3/6/2017 \$3,257,5 Est. Close Date Est. Reven Opportunity · Opportunity Q Look for Account **Opportunity Sales Process** Active for 17 days Pr All records Recent Accounts Summary Products My Connections Connection Test Subjections Relationship View Latest Topi Alpine Ski House SHU Ltd $^{ m \%}$ Connect $^{ m \checkmark}$ 🔁 Baker's Treat 🛛 Zara Sales Connected To Role (To) Description Claunks LTD A Datum Corporation Sales Professional ppp Blue Yonder Airlines Adventure Works Adventure Works MMC AD Work + New Account Alex Simmons Sales Professional Sales Professional Allison Brown Add

Map My Relationships – User Manual

8) This will set the record to the field.

Sale	es Hub			م	Create Connec	ction ×
	← 🔚 Save 🖁 Save & Close	+ New 🖒 Refresh 🖻 E	Export to PDF 🛛 🔋 Close as Won	🚫 Close as Lost	Role	Sales Professional \checkmark
I.	4G Enabled Tablets Opportunity ← Opportunity ← Opportunity Sales Process	0	3/6/2 Est. Cic	017 \$3,257,5 Isse Date Est. Reven	Select Entity *	Account ~
ľ	Active for 17 days	Qualify Connection Test	Develop Subjections Relationship Vi	Pro ew Latest Topi	Selection Type	 Lookup Relationships View
	웎 Connect ~				Selected Record	Best o' Sales
	Connected To	Role (To)	Descriptio	n	Description	
	A Datum Corp	ooration Sales Profe	essional ppp			
	Adventure Wo	orks MMC	AD Work			
	Alex Simmons	Sales Profe	essional			
*	Allison Brown	Sales Profe	essional	_		Save and Close Cancel

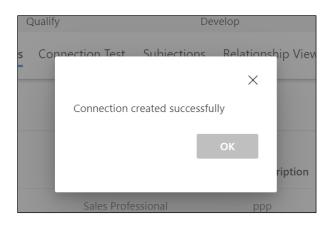
9) You can add description if required.

Sales H	lub						م	Create Connec	ction	×
\leftarrow	🔚 Save	🛱 Sa	ave & Close + New	🕐 Refresh 🛛 🖻 E	xport to PDF	🔋 Close as Won 🛛 🚫	Close as Lost	Role	Sales Professional	~
0	G Enable	Opport	unity \vee	0		3/6/2017 Est. Close D	\$3,257,5 ate Est. Reven	Select Entity *	Account	~
Ac	oportunity S tive for 17 da ummary			Qualify Connection Test		velop Relationship View	Pro Latest Topi	Selection Type	 Lookup Relationships View 	
	R Conne	ect 🗸						Selected Record	Best o' Sales	Q
			Connected To	Role (To)		Description		Description	Account Connection	
			A Datum Corporation	Sales Profe	essional	qqq				
		AW	Adventure Works	MMC		AD Work				
		AS	Alex Simmons	Sales Profe	essional					
-		AD	Allison Brown	Sales Profe	essional				Save and Close	Cancel

10) Click on 'Save and Close'.

Sa	les Hub						م	Create Connee	ction	×
	\leftarrow	Save 🛱 S	Gave & Close + New	🖒 Refresh 📾 E	xport to PDF	🔋 Close as Won 🛛 🚫	Close as Lost	Role	Sales Professional	\sim
^	Opportu	abled Tab nity · Oppor nity Sales Proc	tunity \sim	O		3/6/2017 Est. Close Da	\$3,257,5 ite Est. Reven	Select Entity *	Account	~
	Active for Summa	17 days		Qualify Connection Test		Relationship View	Pro Latest Topi	Selection Type	 Lookup Relationships View 	
	⁸ 2 C	ionnect 🗸						Selected Record	Best o' Sales	Q
			Connected To	Role (To)		Description		Description	Account Connection	
		1	A Datum Corporation	Sales Profe	essional	qqq				
		AW	Adventure Works	MMC		AD Work				
		AS	Alex Simmons	Sales Profe	essional			_		
*	F2 0n		Allison Brown	Sales Profe	essional			l	Save and Close	Cancel

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



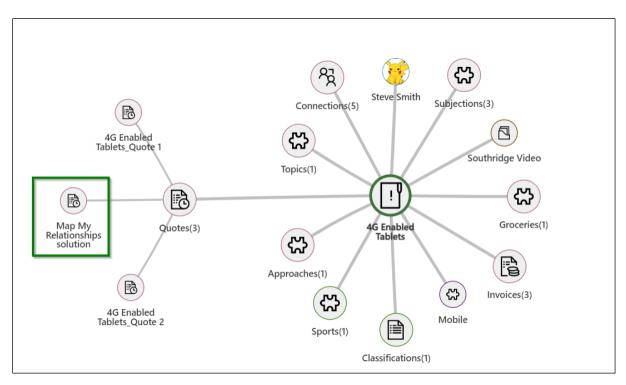
12) Click **'OK'** and the newly added connection will start showing up in both grid and the relationship view.

	led Table		_		3/6/2017 Est. Close Dat	\$3,257,500.00 te Est. Revenue	In Progress Status	Spencer Low (Sample Data Owner
Opportunity Active for 17 d	Sales Proces		Qualify	De	velop	Propose		Close
Summary	Products	My Connections	Connection Test	Subjections	Relationship View	Latest Topics	Topics Simple	
	c	Connected To	Role (To)		Description		Connection Name	9
	A	Datum Corporation	Sales Profe	essional	qqq		A Datum Corporat	tion
	AW A	dventure Works	MMC		AD Work		Adventure Works	
(AS A	lex Simmons	Sales Profe	essional			Alex Simmons	
(AB A	llison Brown	Sales Profe	essional			Allison Brown	
IG Enab	BS B	est o' Sales	Sales Profe	essional	Account Connec	\$3,257,500.	Best o' Sales	Spencer Low (Sample D
)pportunity pportunity	led Table	ts hity ∨ s	Sales Profe			\$3,257,500. Est. Revenue		Spencer Low (Sample D Owner
Opportunity pportunity ctive for 17 d	led Table	ts hity ∨ s	•		3/6/2017 Est. Close D evelop	\$3,257,500. Est. Revenue	00 In Progress Status	Owner Close
Opportunity	led Table r · Opportur Sales Proces lays Products	ts sity ~ s < My Connections	Qualify	D	3/6/2017 Est. Close D evelop Relationship View	Sa,257,500. Est. Revenue Propos Latest Topics	00 In Progress Status See (17 D) Topics Simple	Owner Close

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Hub				م	Create Connec	ction
🗧 🗐 Si		w 🖒 Refresh 🔋 Close as	Won 🚫 Close as Lost	Recalculate Opportunity 🖄	Role	Sales Professional
4G Enabled Opportunity · O	pportunity \vee	Ø		3/6/2017 \$3,257,5 Est. Close Date Est. Reven	Select Entity *	Quote
Active for 23 days Summary Pro		Qualify	Develop Relationship View	Propose (2: Latest Topics Topics Simple	Selection Type	 Lookup Relationships View
월 Connect `	~				Selected Record	Select a record
	Connected To	Role (To)	Description	Connection Nam	Description	
				A Datum Corpora		
	A Datum Corporation	Sales Professional	AC Work	A Datum Corpora		
AW	Advantura Warks	Sales Professional	AC Work	A dventure Works		

a) Select a quote record through the relationship view.



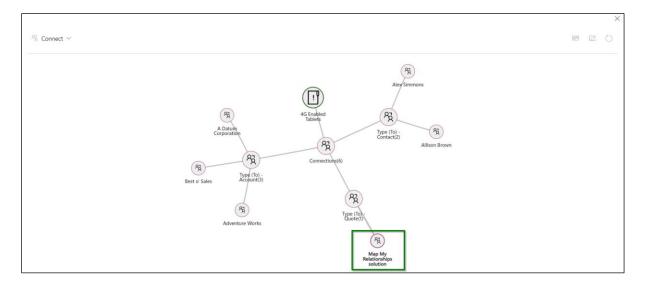
b) Proceed to 'Save and Close'.

es Hub					í.	Create Conne	ction
← 🖫 Save 🛱	Save & Close + New	🖔 Refresh 🛛 🖻 Expo	ort to PDF 🔋 Close as Wo	on 🚫 Close as Lost	🖩 Recalculate Opp	Role	Sales Professional
4G Enabled Tal Opportunity · Opportunity Sales Pro	ortunity ~	0	O		/2017 \$3,257,5 Close Date Est. Reven	Select Entity *	Quote
Active for 23 days Summary Produ		Qualify Connection Test S	Develop ubjections Relationship	o View Latest Topie	Propose (2: cs Topics Simple	Selection Type	 Lookup Relationships View
$^{\rm PR}$ Connect $\scriptstyle \checkmark$						Selected Record	Map My Relationships sol
	Connected To	Role (To)	Descri	ption	Connection Nam	Description	
1	A Datum Corporation	Sales Professio	onal AC Wo	rk	A Datum Corpora		
AW	Adventure Works	MMC	AD Wo	ork	Adventure Works		
AS	Alex Simmons	Sales Professio	onal		Alex Simmons		
АВ	Allison Brown	Sales Professio	onal		Allison Brown		
						Г	Save and Close Cance
IG Enabled							
G Enabled Opportunity · C	Dpportunity \vee	Qu	Julify		Develop		Est. Close Date Est
IG Enabled Opportunity · C Opportunity Sale tive for 23 days	Dpportunity ~			Subjections	Develop Relationship V	'iew Latest	Est. Close Date Est.
IG Enabled Opportunity · C Opportunity Sale tive for 23 days	Dpportunity ~ is Process < roducts My Co			Subjections		'iew Latest	Est. Close Date Est.
IG Enabled Opportunity - C pportunity Sale tive for 23 days Summary Pr	Dpportunity ~ is Process < roducts My Co		onnection Test	Subjections	Relationship V		Est. Close Date Est.
IG Enabled Opportunity - C pportunity Sale tive for 23 days Summary Pr	Dpportunity ~ is Process < roducts My Co	nnections Co	onnection Test		Relationship V		Est. Close Date Est.
IG Enabled Opportunity - C pportunity Sale tive for 23 days Summary Pr	Dpportunity ~ IS Process < roducts My Co ~	nnections Co	Con		Relationship V		Est. Close Date Est.
IG Enabled Opportunity - C pportunity Sale tive for 23 days Summary Pr	Dpportunity ~ s Process < roducts My Co ~ Connected	nnections Co To	Connection Test		Relationship V		Est. Close Date Est. Propo Topics Topics Sin Connection A Datum Co
IG Enabled Opportunity - C pportunity Sale tive for 23 days Summary Pr	Deportunity ~ Is Process < roducts My Co Connected A Datum Co Adventure N Alex Simmo	To Vorks	Connection Test	nnection created	Relationship V successfully OK		Est. Close Date Est. Propos Topics Topics Sin

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

portunity tive for 23 o	Sales Proce	*** <	Qualify		Develop		Propose (23	D)	Close	
ummary	Products	s My Connections		Subjections R	elationship View	Latest Topics	Topics Simple	Simple MMR View	Invoices	
	1	A Datum Corporation	Sales Profes	sional	AC Work		A Datum Corpora	tion		
	AW	Adventure Works	MMC		AD Work		Adventure Works			
	AS	Alex Simmons	Sales Profes	sional			Alex Simmons			
	AB	Allison Brown	Sales Profes	sional			Allison Brown			
	BS	Best o' Sales	Sales Profes	sional	Account Connec	tion	Best o' Sales			
	M	Map My Relationships so	lution Sales Profes	sional			Map My Relations	hips solution		

As well as in the relationship view of connections:



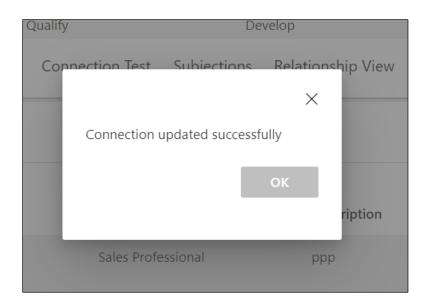
13) This is not where it ends, user is also given a provision to update the connection record. Double click on the connection record that you would like to update.

	✓ Opportunity ∨	0			Est. Close Date Est. Revenue	a		
pportunity ctive for 31 d	Sales Process	Qualify		Develop	Propo	se (31 D)	Clos	e
Summary	Products My Connectio	ns Connection San	STD	Connection Test	Connection Tiny View	Subjections	Relationship View	
As	Alex Simmons	Former Employer			Alex	Simmons		
АН	Alpine Ski House	MMC			Alpin	e Ski House		
BT	Baker's Treat	Former Employer		Treats	Bake	r's Treat		
DF	Derby FC	MMC		Football Clu	b Derb	y FC		

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				, の Update Conr	nection ×
← 🗟 Save 🛱 Save & Close + New	🖒 Refresh 🛛 🖻 Export to PE	DF 🔋 Close as \	Von 🚫 Close as Lo	Role	Former Employer V
Audio Equipment Opportunity · Opportunity ·			4/20/2017 \$8,7 Est. Close Date Est. F		Contact ~
Opportunity Sales Process Active for 31 days	Qualify	Develop		Pro	
Summary Products My Connections	Connection San STD C	Connection Test	Connection Tiny \	Selection Type	 Lookup Relationships View
Alex Simmons	Former Employer			Al- Selected Record	d Alex Simmons $ ho$
Alpine Ski House	ММС			Al	Connection contact
Baker's Treat	Former Employer	Treats		Ва	
Derby FC	ММС	Football Clui)	De	
Interested in Alerts4Dvnamics	ММС			Int	
• •					Save and Close Cancel

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



16) Updates will reflect into the record.

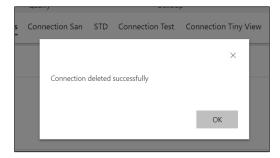
	uipment Opportuni	ty \sim				4/20/2017 Est. Close Date	\$8,710,785 Est. Revenue		SS Anne Weiler (Sar Owner	nple Data
portunity tive for 31 d	Sales Process ays		Qualify		Develop		Propos	D se (31 D)	Cl	ose
ummary	Products	My Connections	Connection San	STD	Connection Test	Connection	Tiny View	Subjections	Relationship View	
AS	Alex Simm	ons	Former Employer		Connection	contact	Alex S	Simmons		:
АН	Alpine Ski	House	ММС				Alpin	e Ski House		
BT	Baker's Tre	at	Former Employer		Treats		Baker	's Treat		
DF	Derby FC		MMC		Football Clu	0	Derby	/ FC		
IA	Interested	in Alerts4Dynamics	MMC				Intere	sted in Alerts4Dy	namics	

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

Deleting from larger connection control –

• 1	1 1	Save	t choe as won 🙆 close as lost	E realizion dei tenditenden	e - Sudebacke El teleb	译 Sh
		Tablets - Saved			Account Est. close date Est. revenue	Contraction Andreador
Sales P	ocess		Ο	0	0	0
Active fo	r 25 hours	×	Qualify (25 Hrs)	Develop	Propose	Close
Sumn	nary M	apMyRelationship Map	MyConnections Products Q	uotes Files Related $^{\smallsetminus}$		
					+ New Connection	\circlearrowright Refrest Delete Flow \checkmark
₿ Co	nnect To					2 🗊 🖾 🗞
[₽] ≹ Co	onnect To	Connected To \uparrow	Role (To)	Description		1 🗊 🖾 🗞
⁸ ≹ Co	onnect To	Connected To ↑ Alex Baker	Role (To) Former Employer		ontext of each connection within your network	
_				fields define the nature and co	ontext of each connection within your network anage relationships more effectively, making it a	
_	0	Alex Baker	Former Employer	fields define the nature and co		easier to understand each entity's
_	(a) (A5)	Alex Baker Alex Simmon	Former Employer Client Success Specialist	fields define the nature and co	anage relationships more effectively, making it (easier to understand each entity's

Connection record is deleted successfully.



Deleting from smaller card view -

Map My Relationships – User Manual
4G Enabled Tablets - Saved Opportunity · Opportunity ·
Account Est. close date Est. revenue
Sales Process O O Active for 27 hours Qualify (27 Hrs) Develop
Summary MapMyRelationship MapMyConnections Products
8 Connect To ···
Alex Baker Former Employer
O As Alex Simmon Client Success Specialist helps users categorize and manage relationships more effective
Carla Yates Sales Professional helps clarify the purpose and context of the connection within your ne
O D Jabez Parker Sales Director

Connection record is deleted successfully.

	Qualify	Develo	qu	Propose (3
tions	Connection San	STD Connection Test	Connection Tiny View	Subjections I
	Connection	deleted successfully	OK V	

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

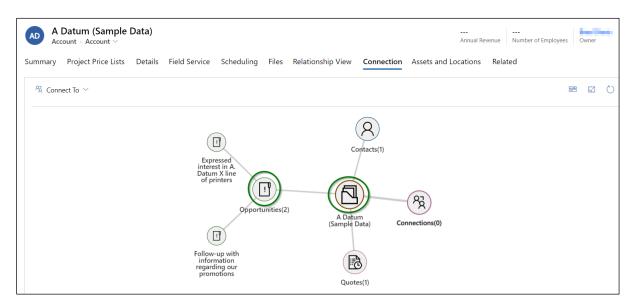
Create Connections within Relationship View

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.

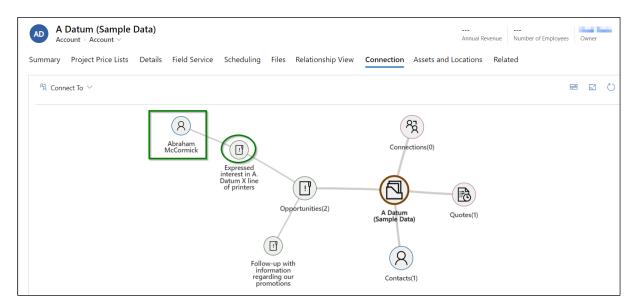
This is explained in detail in the below scenario.

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.



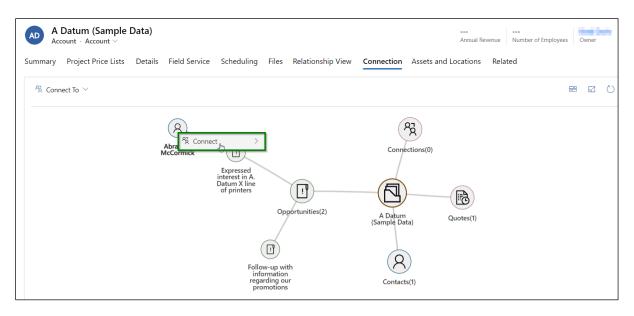
By double clicking on **'Expressed interest in A. Datum X line of printers'**, it will further expand and display its contact as shown below. (Here, we are drilling down through the opportunity record to reach its contact to connect to the main account record **'A Datum (Sample Data)'**).



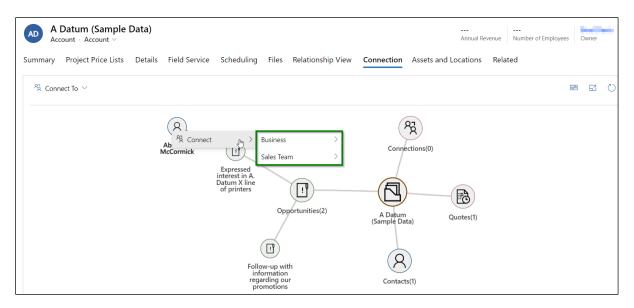
Suppose the user wants to connect this 'Abraham McCormick' contact to 'A Datum (Sample Data)' main account record.

For this, follow the steps given below:

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



 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.

A Datum (Sample Data Account · Account ·)			Annual Revenue	 Number of Employees	Owner
Summary Project Price Lists Det	ails Field Service	Scheduling Files Relationship \	/iew Connection Assets	and Locations Rela	ated	
発 Connect To 〜						9 63 (
	C	Business Business Sales Team Sales Team Copportunities(2) Follow-up with information regarding our promotions	Delivery Professional Account Manager Perritory Manager Service Professional Industry Expert Sales Professional Technical Sales Professional	Quotes(1)		

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

Sales Hub A	Create Connection	×
E Save & Close + New & Open Org Chart Deactivate & Connect V = Add to Marketing List 8, 1	Role Account Manager	~
A Datum (Sample Data) Account · Account ~	Select Entity Contact	~ *
Summary Project Price Lists Details Field Service Scheduling Files Relationship View Connection Assets and Lc	Selected Record Abraham McCormick	D
Abraham McCormick	Description	
Expressed interest in A. Datum X line of printers		
Opportunities(2) A Datum (Sample Data) Qu		
Follow-up with information regarding our promotions Contacts(1)		
	Save and Close Cancel	

5) Click on 'Save and Close'.

ales Hub			
	Create Connec	tion	×
← 🖬 Save & Close + New 🖧 Open Org Chart 🕼 Deactivate 🖏 Connect ∨ ≒ Add to Marketing List 🛝	Role	Account Manager	\sim
A Datum (Sample Data) Account · Account · Summary Project Price Lists Details Field Service Scheduling Files Relationship View Connection Assets and Lc	Select Entity	Contact	~ *
	Selected Record	Abraham McCormick	Q
Abraham McCormick	Description		
Expressed interest in A. Datum X line of printers Opportunities(2) A Datum (Sample Data) Qu			
Follow-up with information regarding our promotions Contacts(1)			
P2 Artise	[Save and Close	ancel

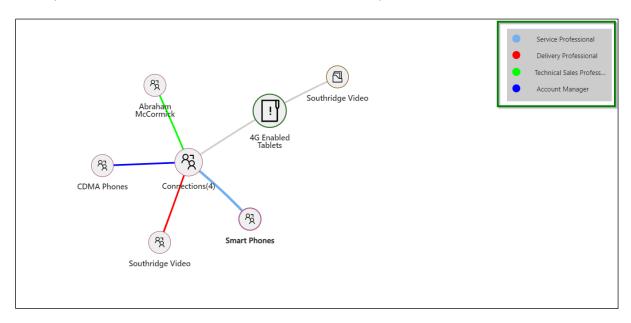
 The connection is now successfully created and it will start appearing under 'Connections' of 'A Datum (Sample Data)' account record.

AD A	Datum (Sample	Data)						Annual Revenue Number	r of Employees Owner
Summary	Project Price Lists	Details	Field Service	Scheduling	Files	Relationship View	Connection	Assets and Locations Related	
웒 Con	nect To $$								88 EJ 🖒
						\frown			Account Manager
				Quotes(1)	(5	A Datum ample Data)	Connections(1)	Abraham McCormick	

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.

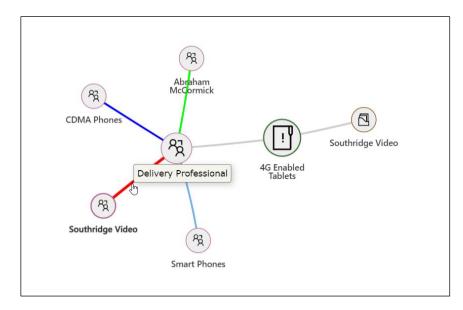
Colour legends in connection relationship view

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;



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.

pportunity	· Opportunity \vee			Est. Close Date Est. Reve	nue Status	Owner
portunity tive for 50 d	Sales Process Alays	Qualify	Develop	Propose (50 E))	Close
ummary	Connections Smaller View	Products Quotes Invoices	Relationship View	Connections Tab Field Service	Files Related	
^{ମ୍} ୟୁ Conn	ect To $ \smallsetminus $					\$• E1
	Connected To ↑	Role (To)	Туре (То)	Description	Created By	
	Abraham McCော့mick	Technical Sales Professional	Contact		No. Cash	
СР	CDMA Phones	Account Manager	Opportunity		Section 4	
SP	Smart Phones	Service Professional	Opportunity		Section 4	
	Southridge Video	Delivery Professional	Account	AS	No. Contact	

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

Map My Relationships – User Ma	nual		
← 🖬 Save 🛱 Save & Close + New 🕞 Deactivate 🗞 Con	nect \vee : Add to Marketing List		
Summary Details Scheduling Files Relationship View Re CONTACT INFORMATION	elated		
First Name ⁺ Abraham	ho Search timeline		
Last Name * McCormick	Enter a note		
Job Title			

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

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