Map My Relationships

Inogic

User Manual

Content

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

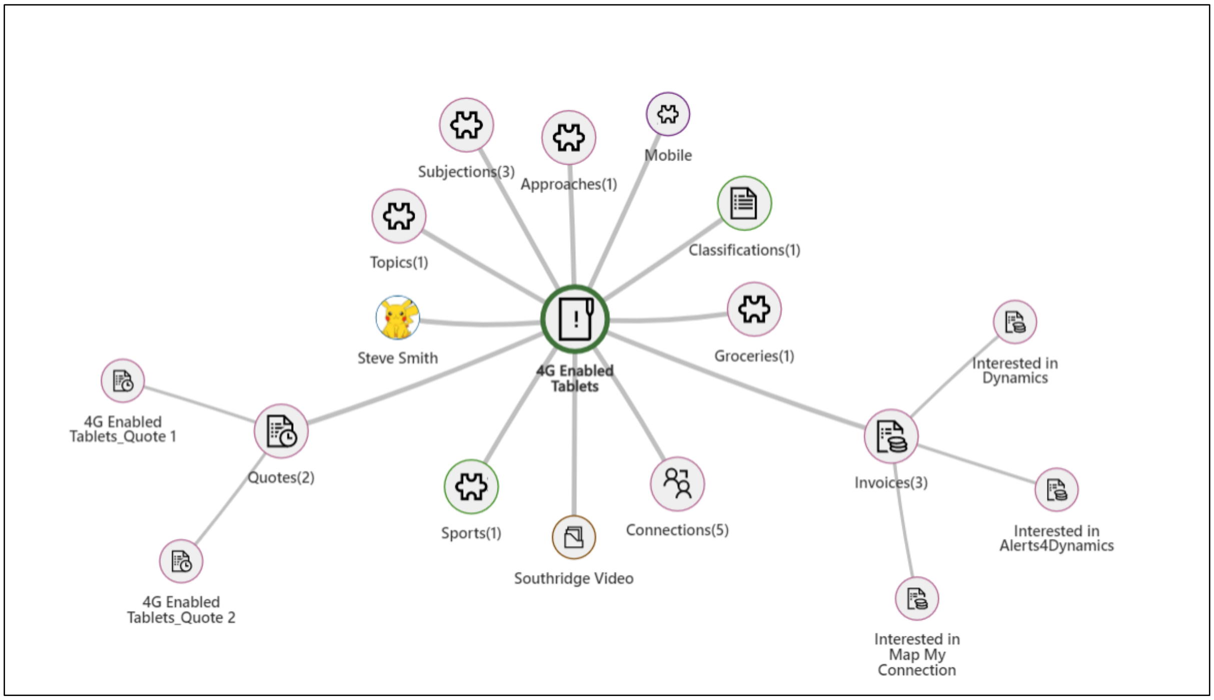
- Capability to configure the connection control to create, update, view and delete the connection records more efficiently to improve an overall connection management
- Ability to add filters on connection role categories and entities that user wishes to create a connection with. Connection role category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

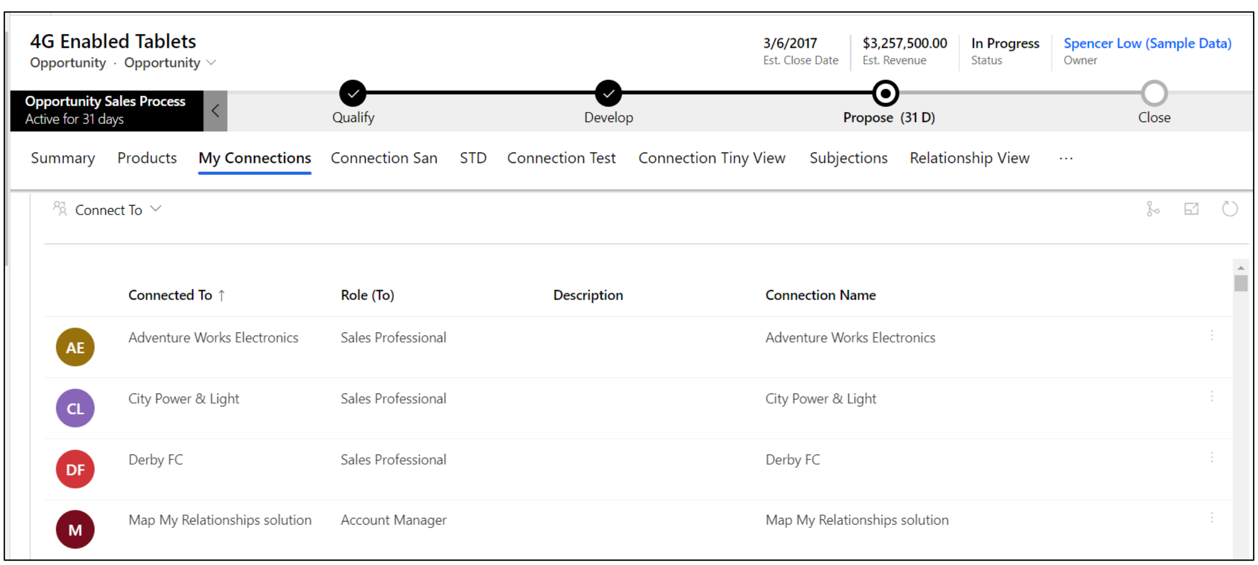
Deployment: Online

Relationship and Connection Controls

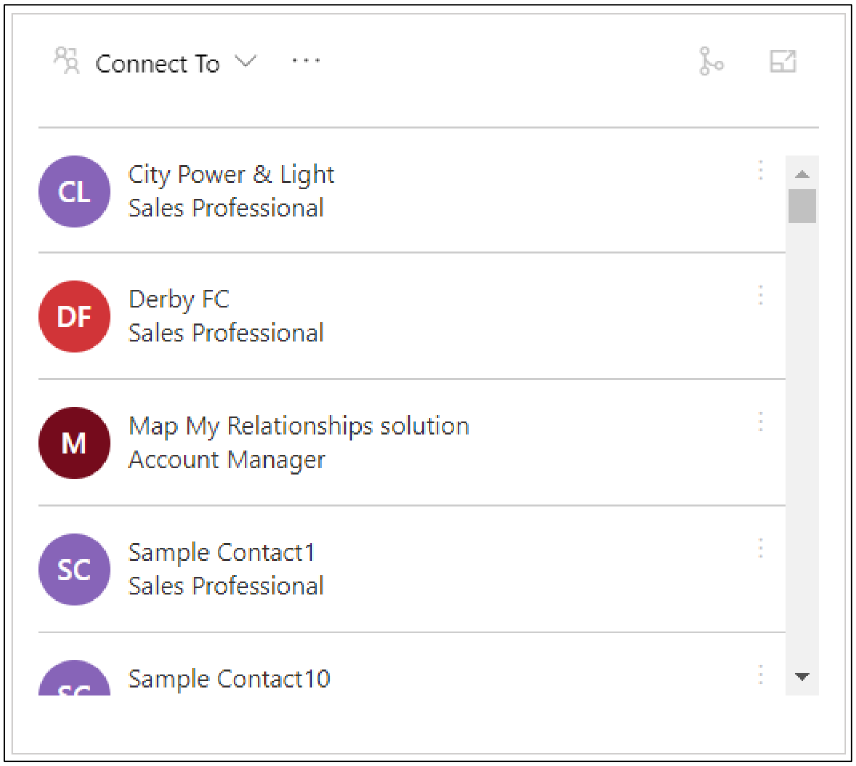
Map My Relationships:



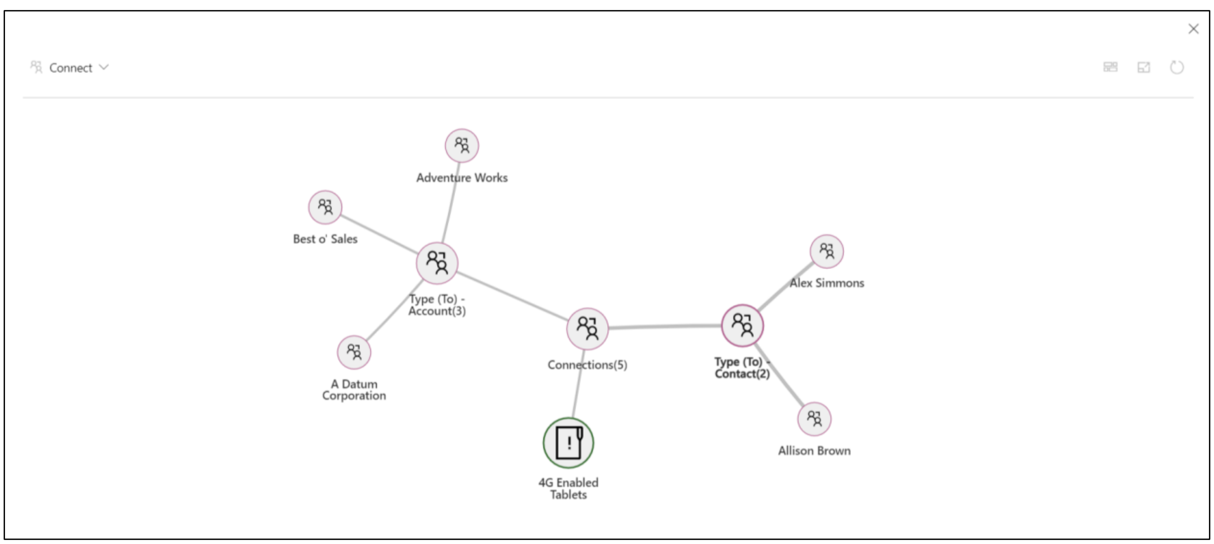
Map My Connections – Larger Grid:



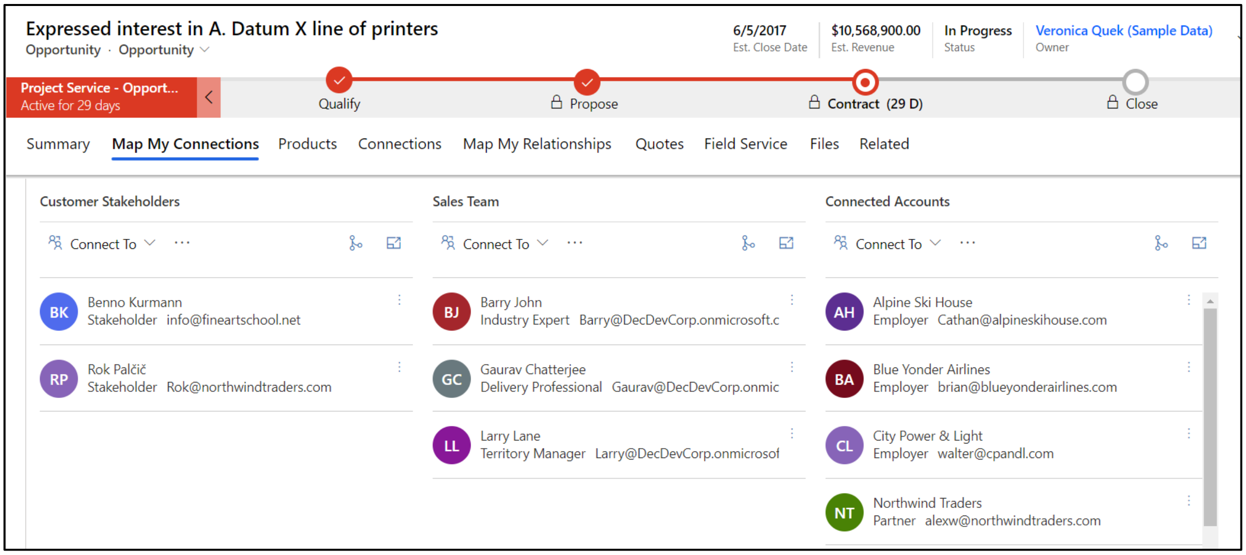
Map My Connections – Smaller cards:



Map My Connections – Relationship view:



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



Security Roles

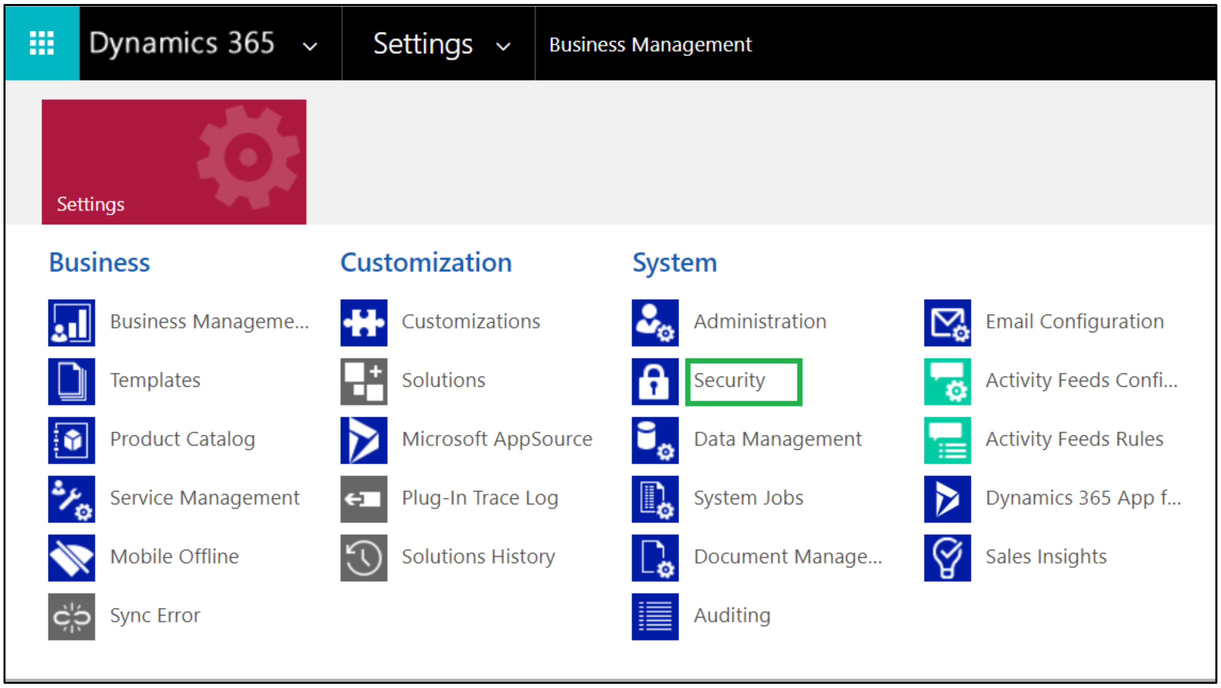
Two security roles, particularly for **Map My Relationships**, come along with the solution.

1. **Map My Relationships Administrator** – The Administrator has given the privilege for License Registration and has organization-level access of all entities of Map My Relationships i.e. Entity Configuration and Entity Relationships. The user with having this role would be able to set up the Map My Relationships view using advanced configuration i.e. would be able to define settings in Entity Configuration and Entity Relationships records.
2. **Map My Relationships User** – The users with having this role would be able to see the Map My Relationships view in Dynamics 365 forms.

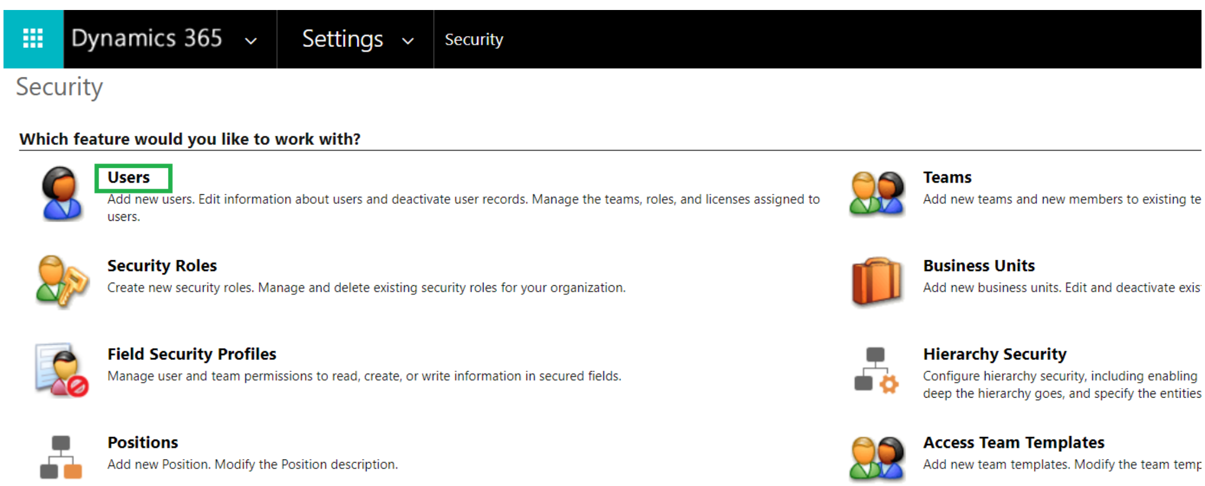
Note: System Administrator has all the rights that Map My Relationships administrator has.

Here are the steps to assign security role to users.

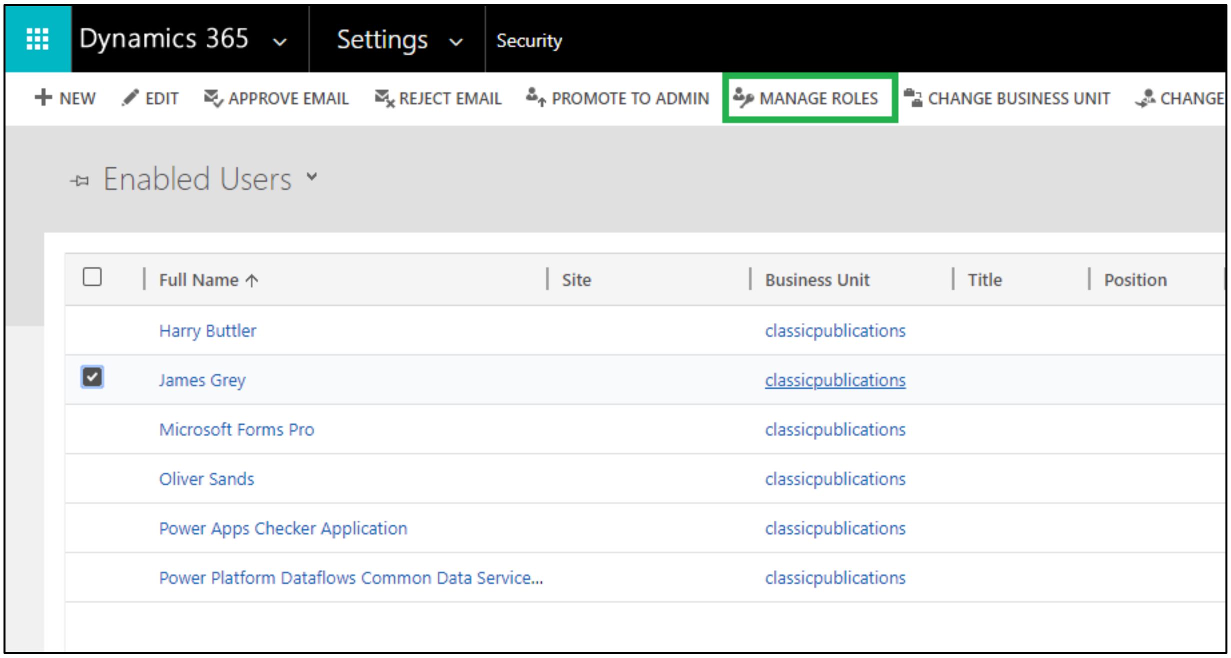
- Go to Advanced Settings --> Settings --> Security.



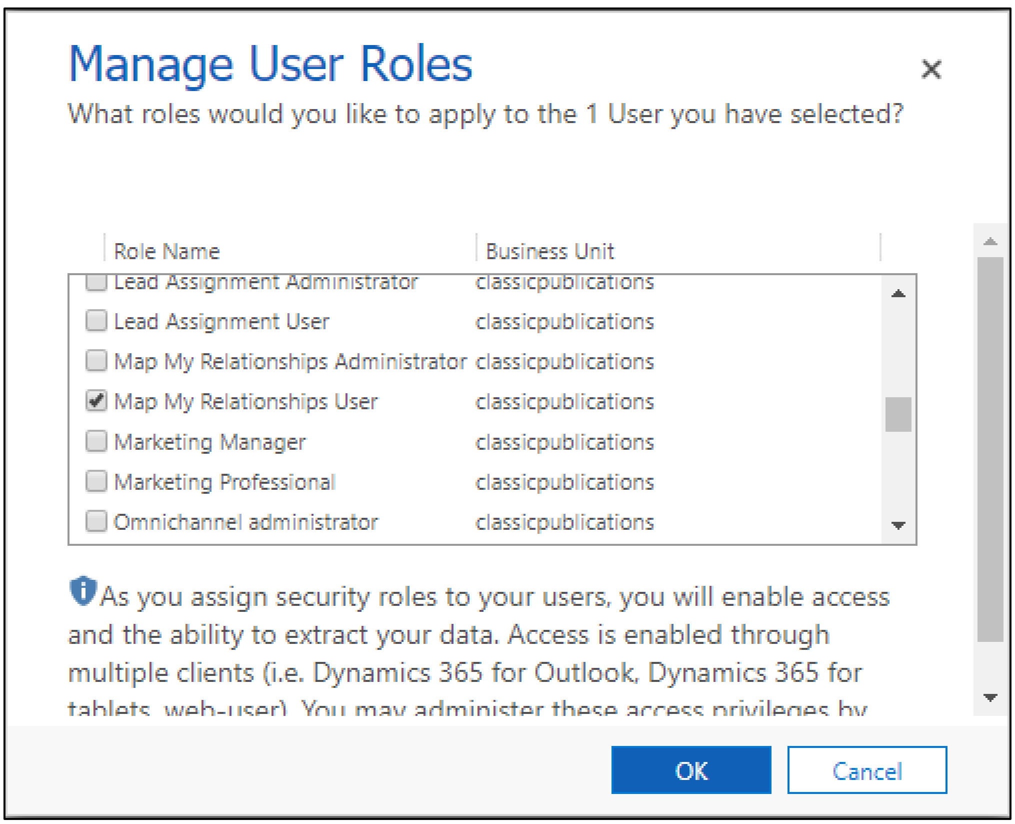
- Select Users.



- Select user --> Click on MANAGE ROLES.



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



Map My Relationships Control

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

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

Map My Relationships – Basic Configuration

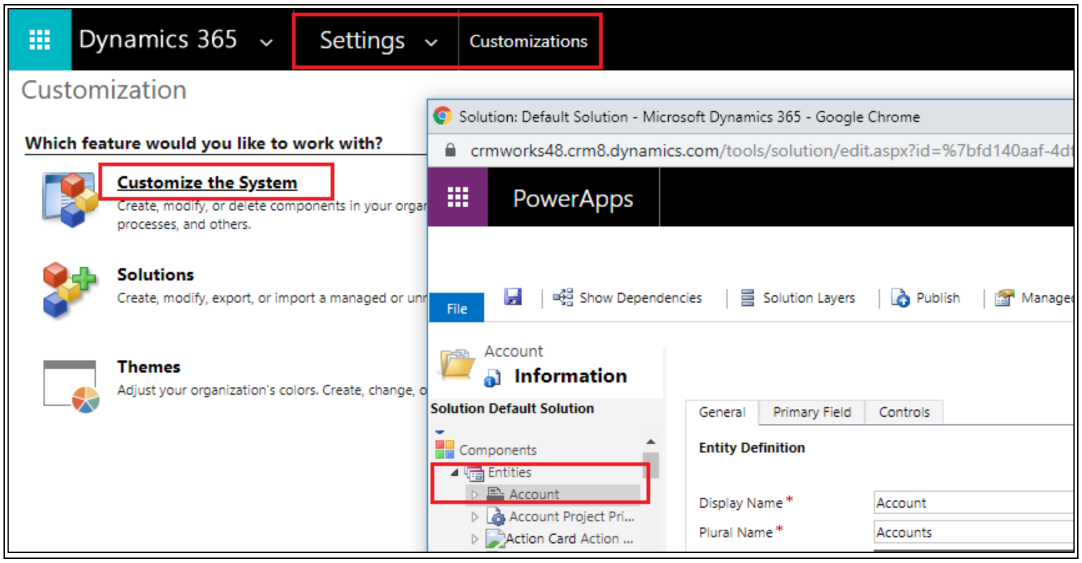
Prerequisites: The user should have the System Administrator or System Customizer role.

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.

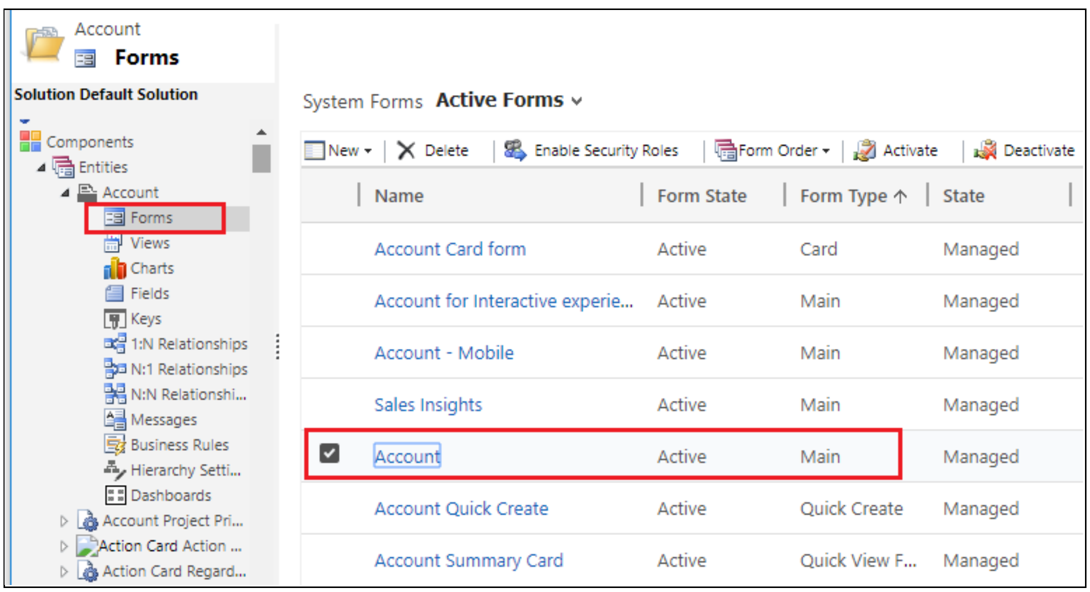
Note: The Administrator can configure the Map My Relationships control for any number of entities in the system.

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

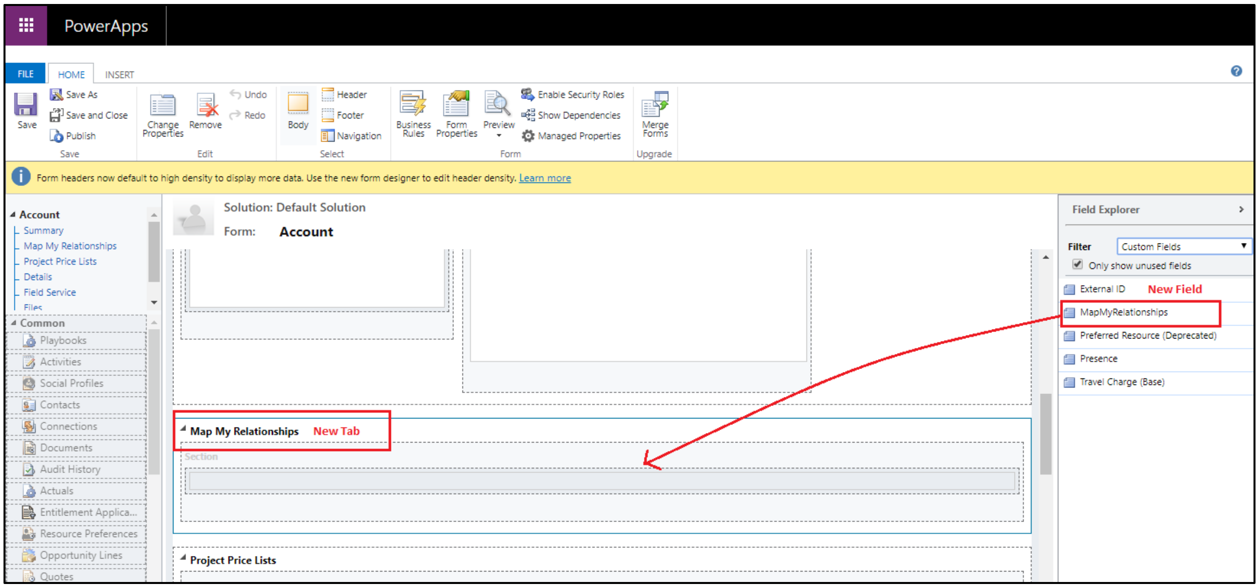
1. Navigate to **Default Solution** Settings → **Customizations** → **Customize the System** → Expand Entities and select the entity.



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

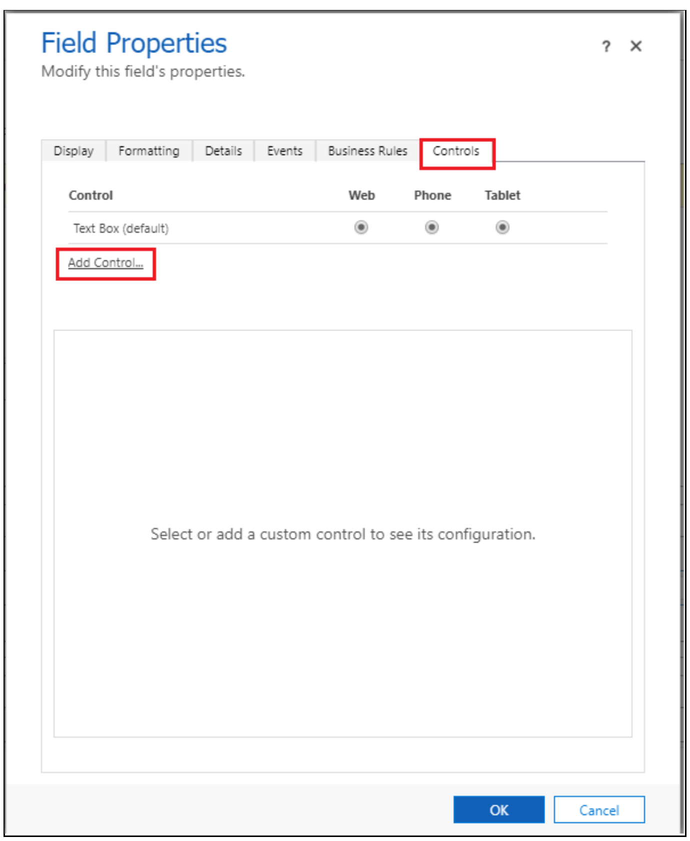


3. The next step is to bind a Map My Relationships control to any text field. The Best approach is to create a new text type of custom field. Add a custom text field on the form wherever the users/administrator likes to see it. There is no limitation on where to add the Map My Relationships view on the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

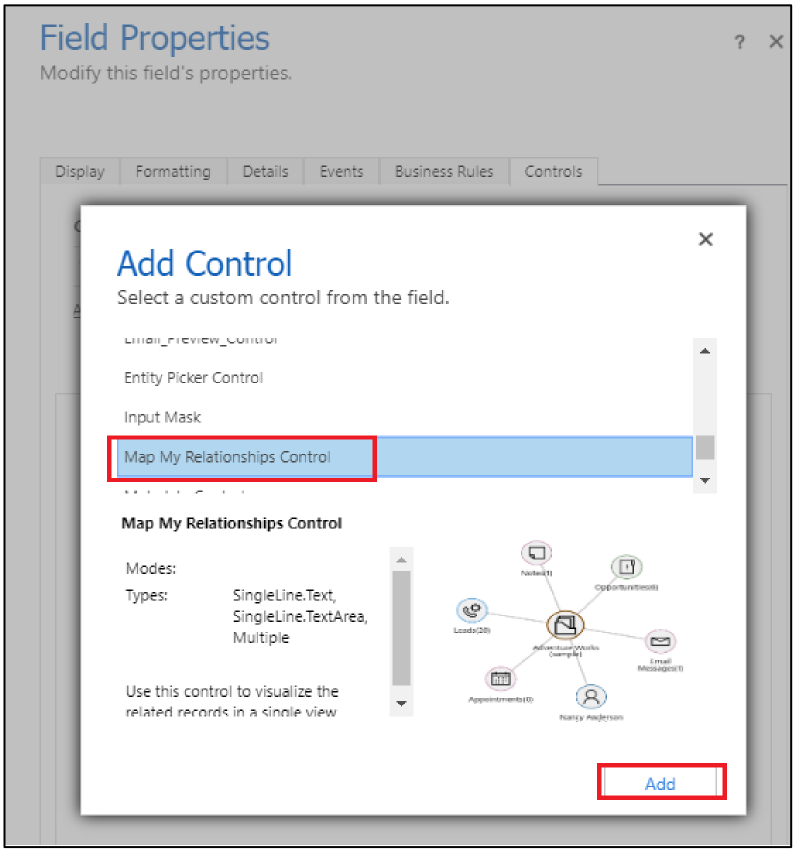


Note: New field of type text is required to bind Map My Relationships control. The field does not hold any data.

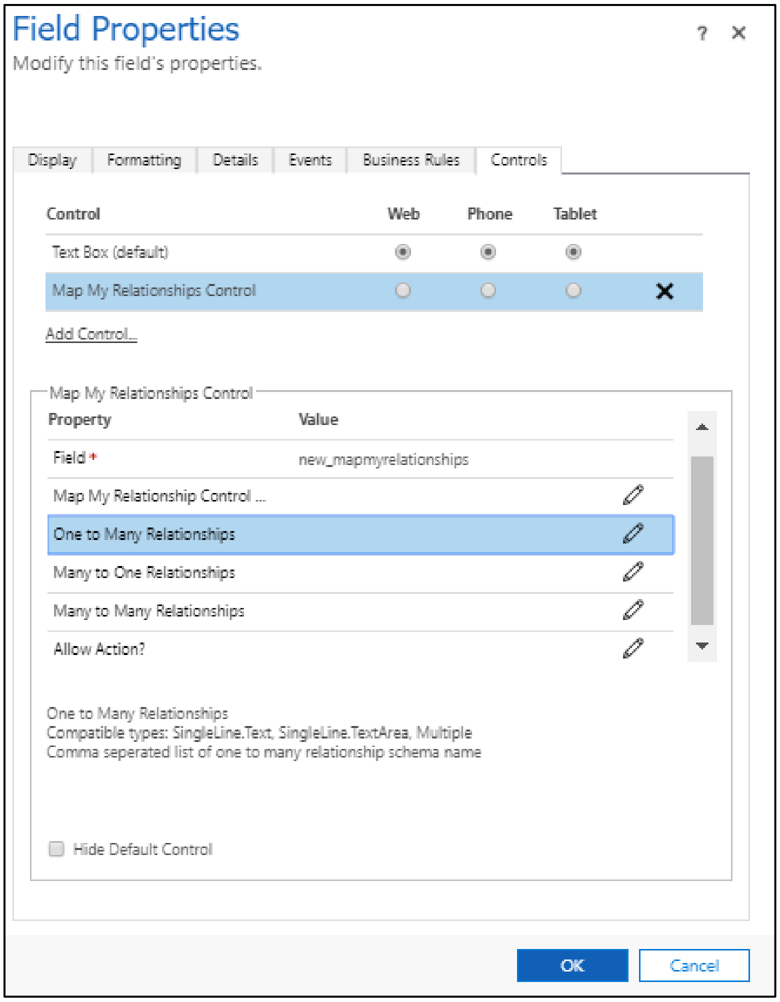
4. Edit the properties of the field and bind control. In field properties, go to Controls and then click on Add Controls button.



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



5. Fill in the values for following properties, **'One to Many Relationships'**, **'Many to One Relationships'**, **'Many to Many Relationships'** and **'Allow Actions?'**
   The first property **'Map My Relationships Control Configuration'** is for advanced configuration. (see section)



One to Many Relationships: Enter the comma separated one to many relationship schema names.
Ex: Account_Emails, Account_PhoneCalls
Here Account is the primary entity where control is being added and Email and Phone calls are related to account as 1:N relationship. This will show emails and phone call of the account record.
Follow 'How to get relationships schema name?' section to know how to find relationships schema name.

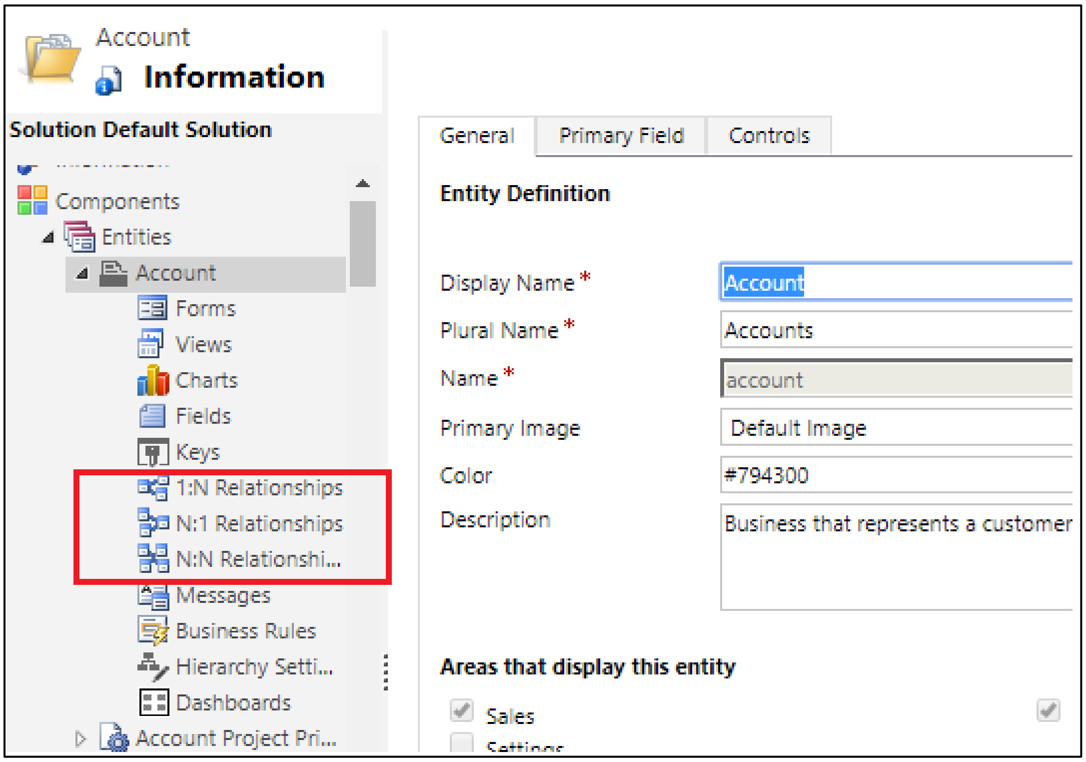
Many to One Relationships: Enter the comma separated many to one relationship schema names.
Ex: account_primary_contact, account_originating_lead
Here Account is the primary entity and contact (Primary Contact) and lead(Originating Lead) are the related entity with N:1 relationship.
Follow 'How to get relationships schema name?' section to know how to find relationships schema name.

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

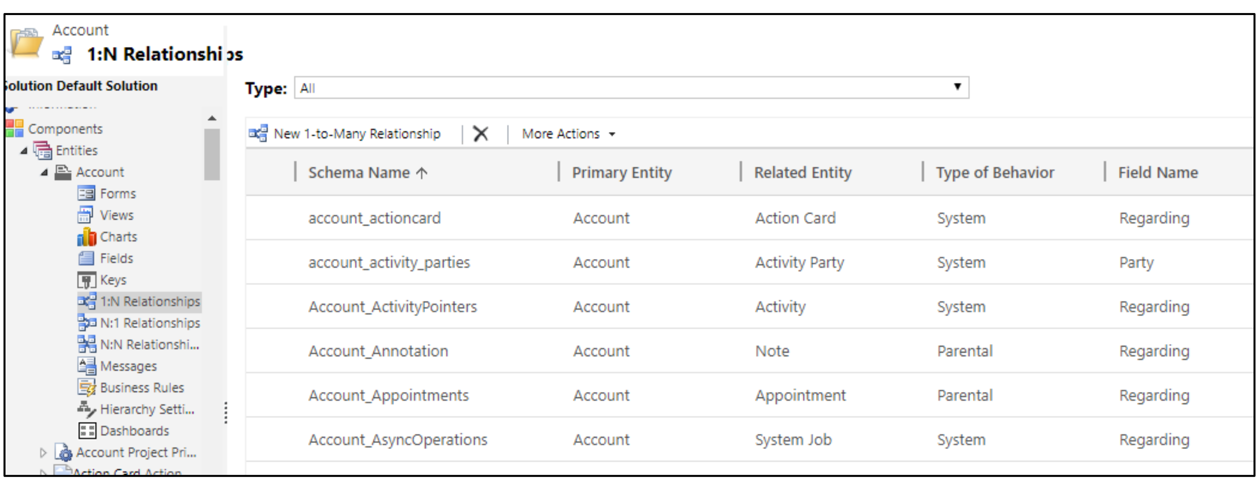
How to get relationship schema name?

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

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

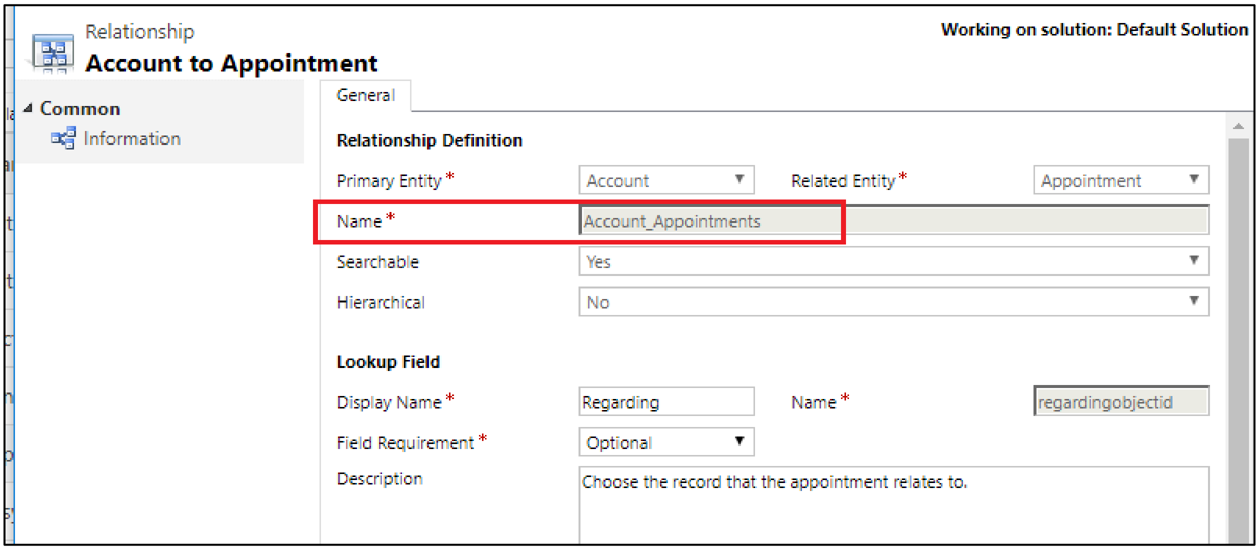


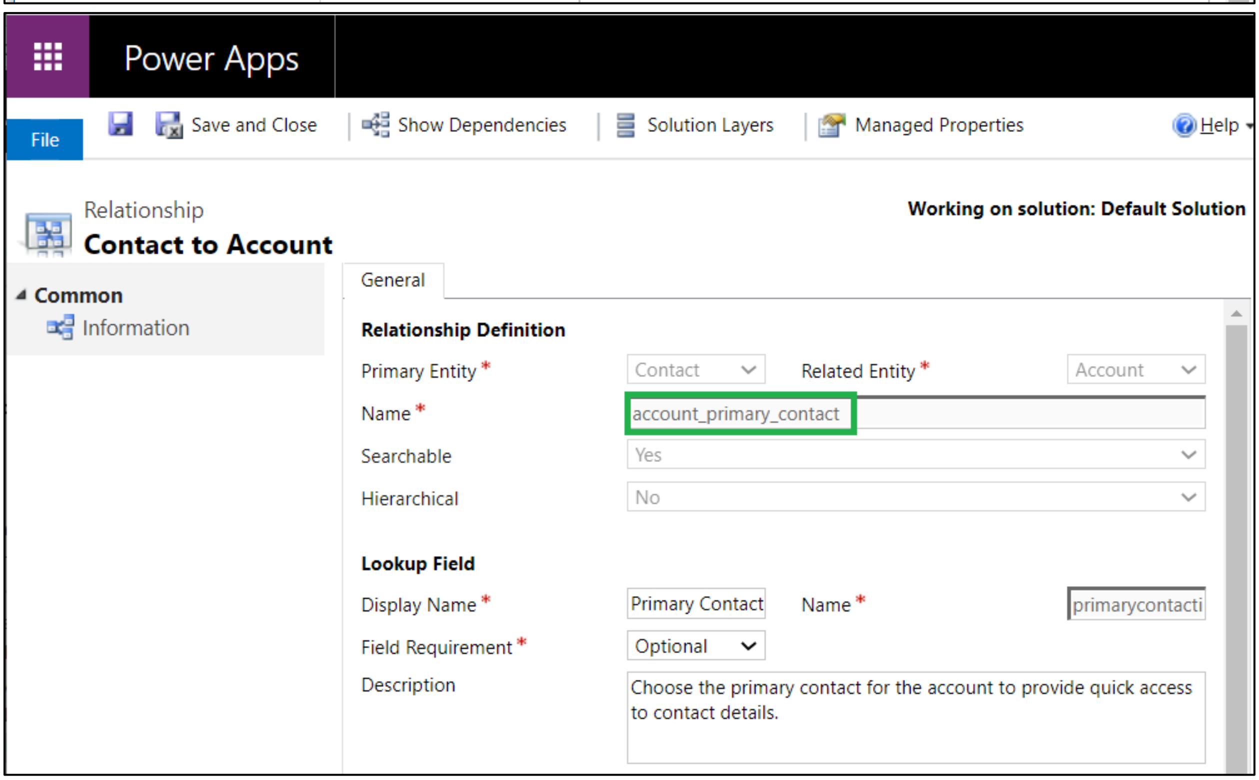
3. Click on **1:N Relationships**, **N:1 Relationships** and **N:N Relationships** to get the list of relationships available in the system.



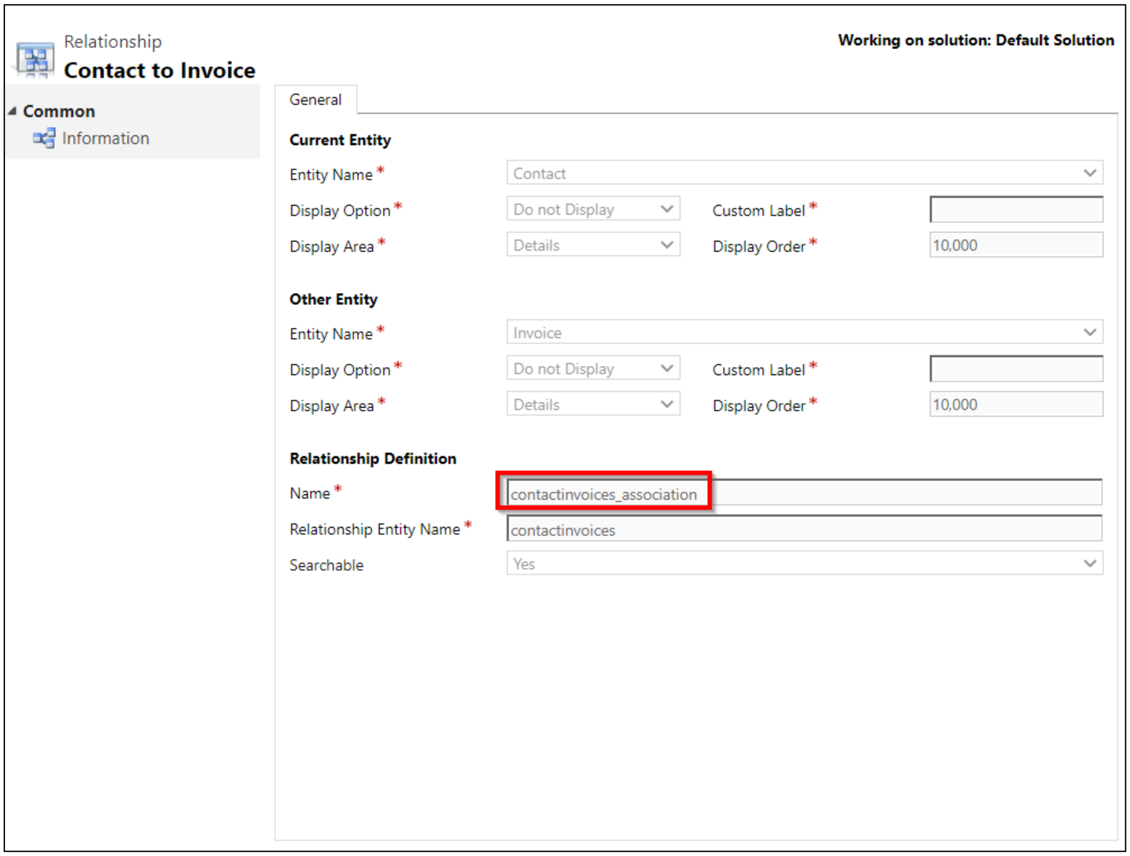
4. Open the relationship from the list and copy the **Schema name**.

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





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.

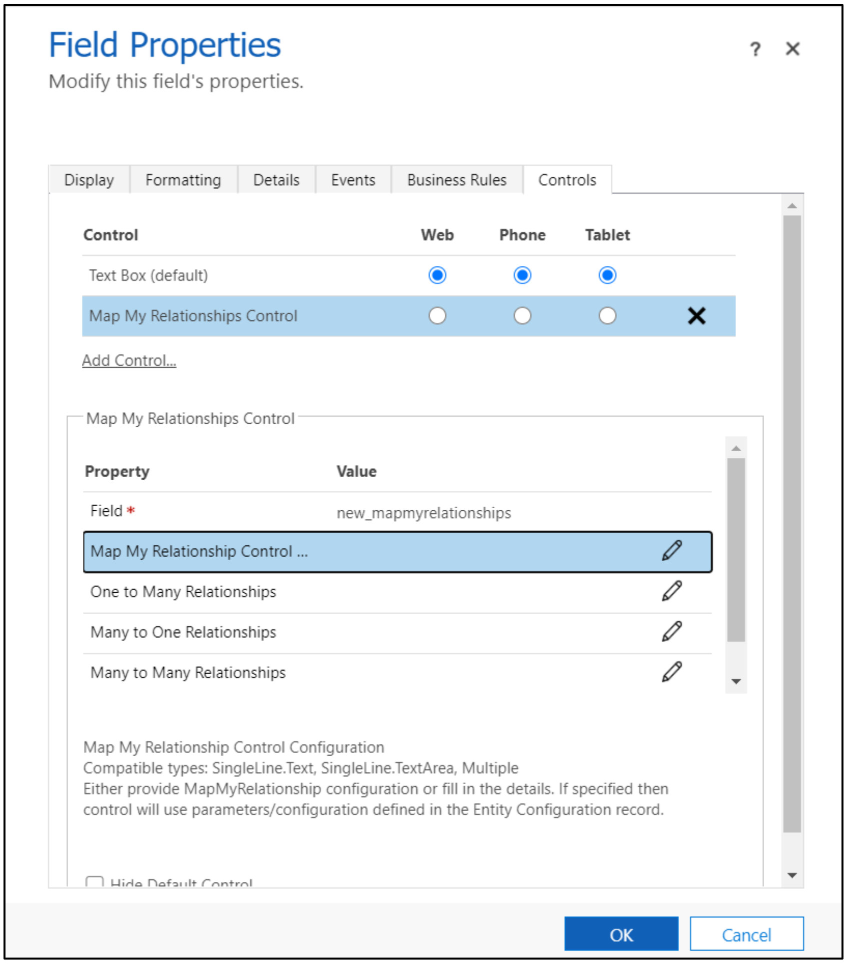


5. Copy this name in comma separated format in properties of the **Map My Relationships** control.

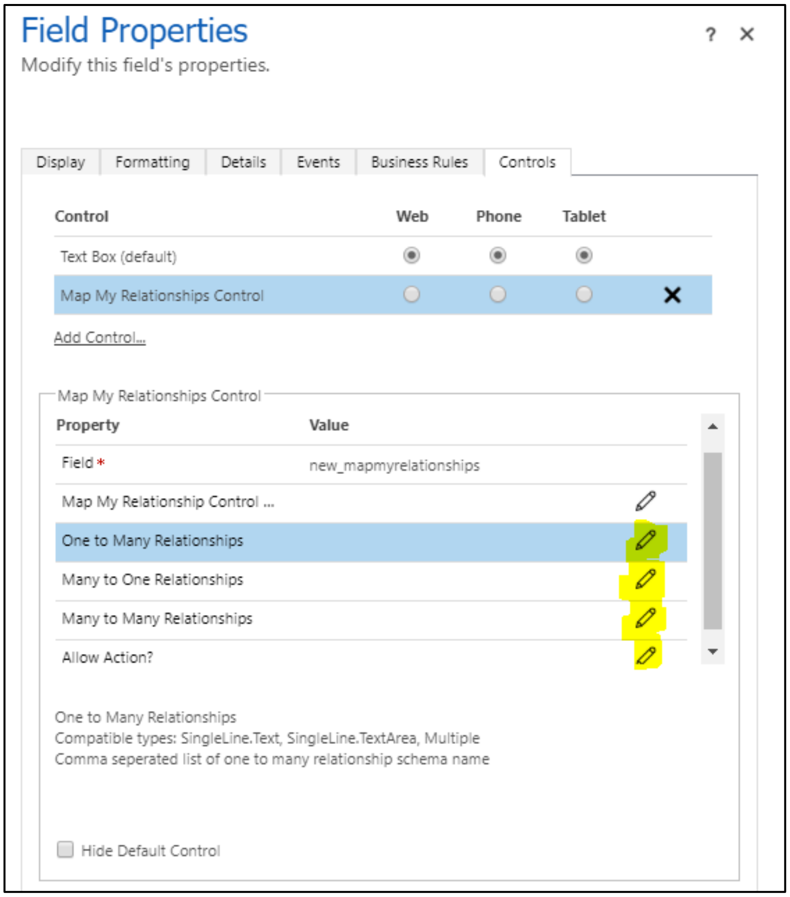
Set parameters to bind Relationships

After acquiring 'Relationship Schema Names', you are now ready to set parameters to bind Relationships.
Here are the steps for the same:

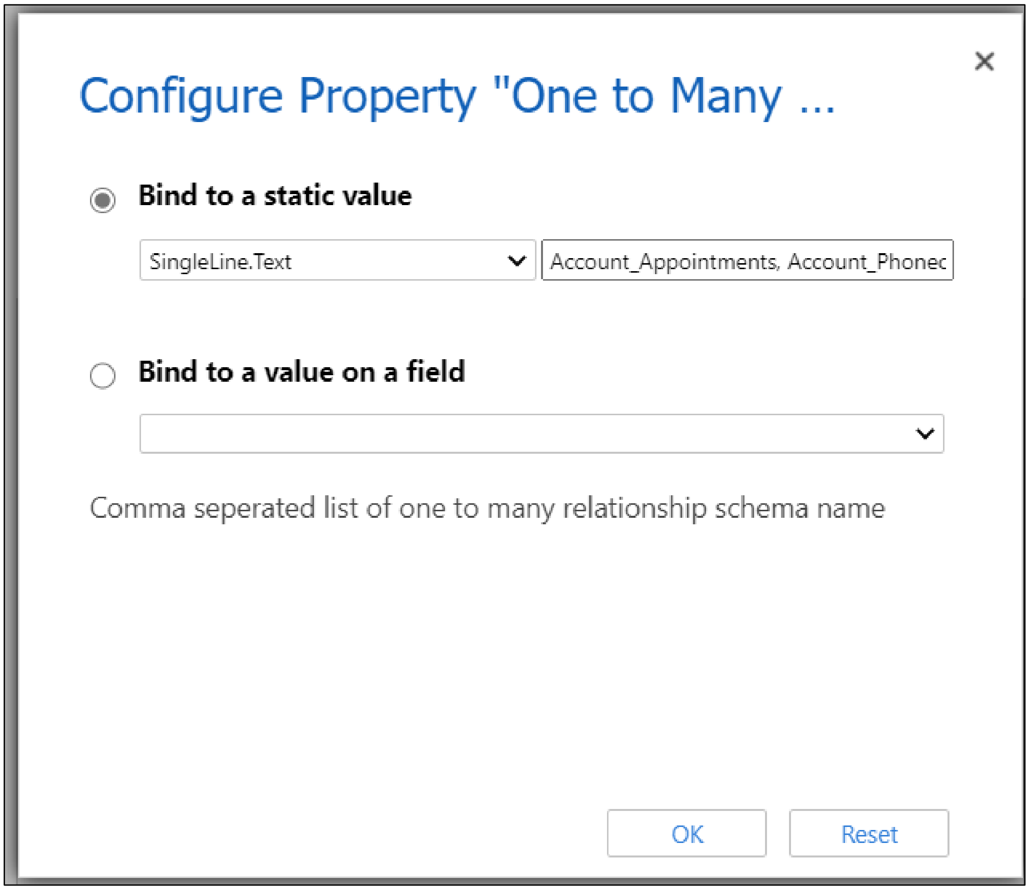
- Click on 'Map My Relationships' text field --> Go to Controls --> Select Map My Relationships control.



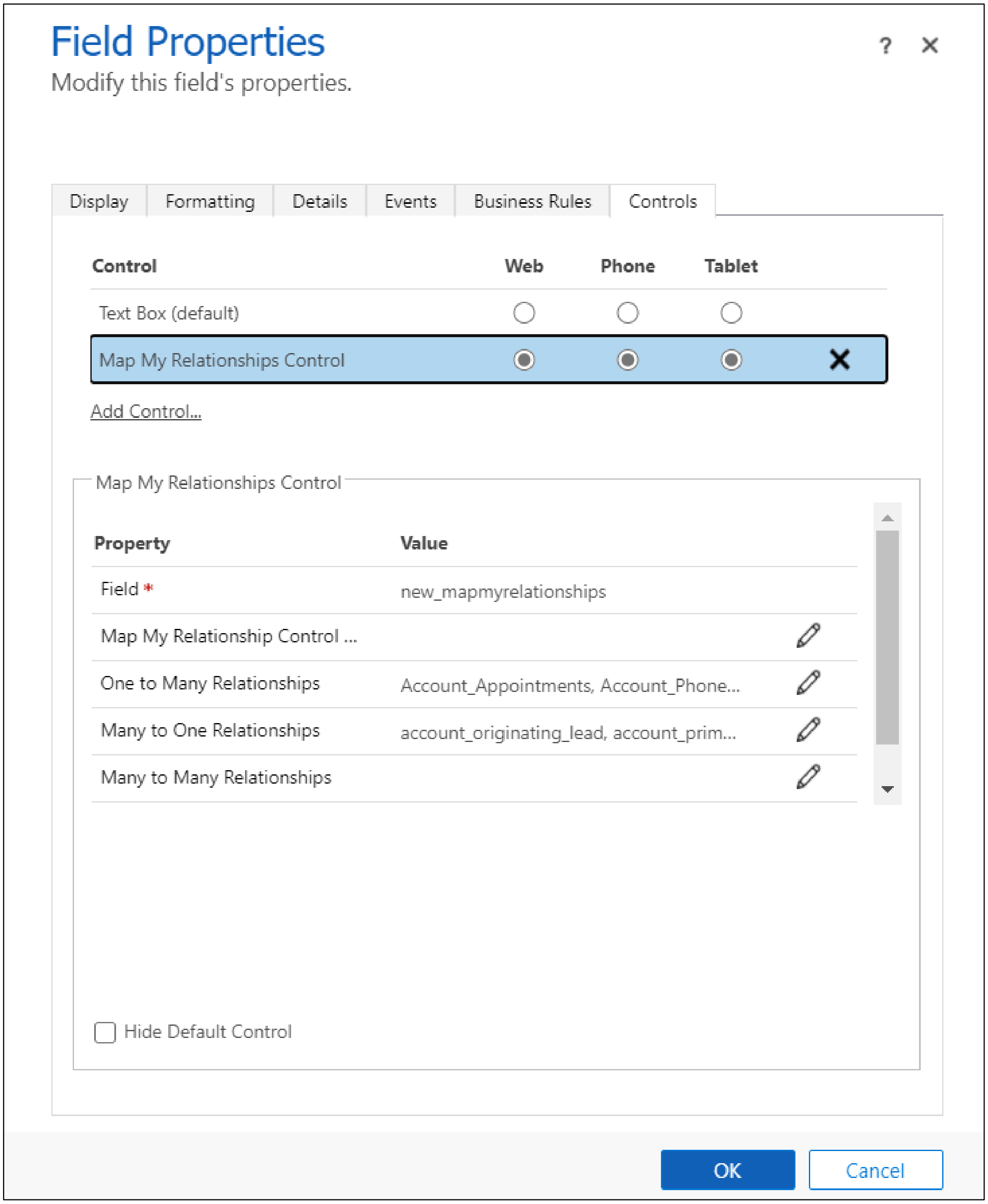
- Go to **One to Many Relationships** --> Click on **edit** button.



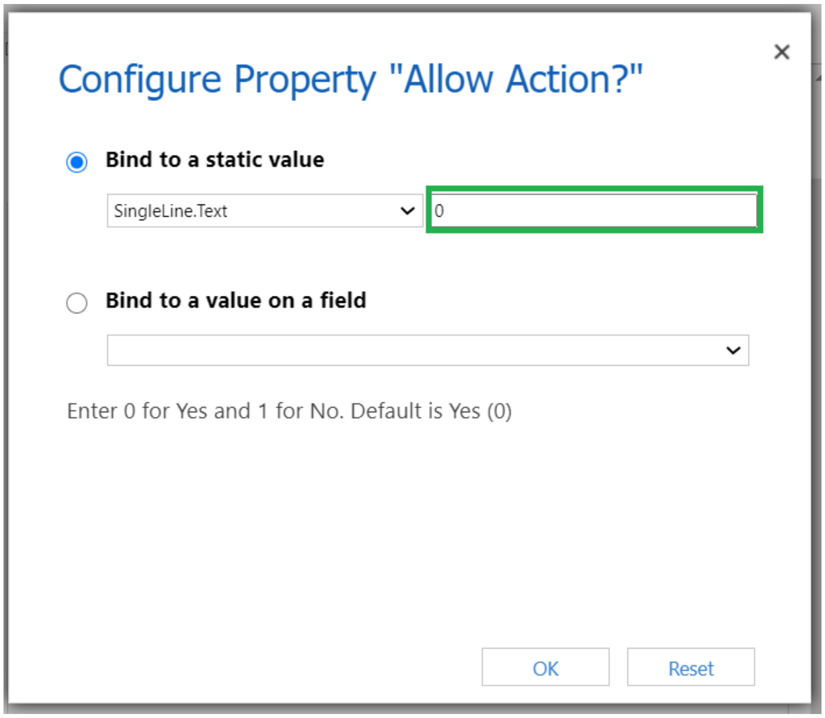
6. Select **'Bind to a static value'** and enter the comma separated relationship schema name.



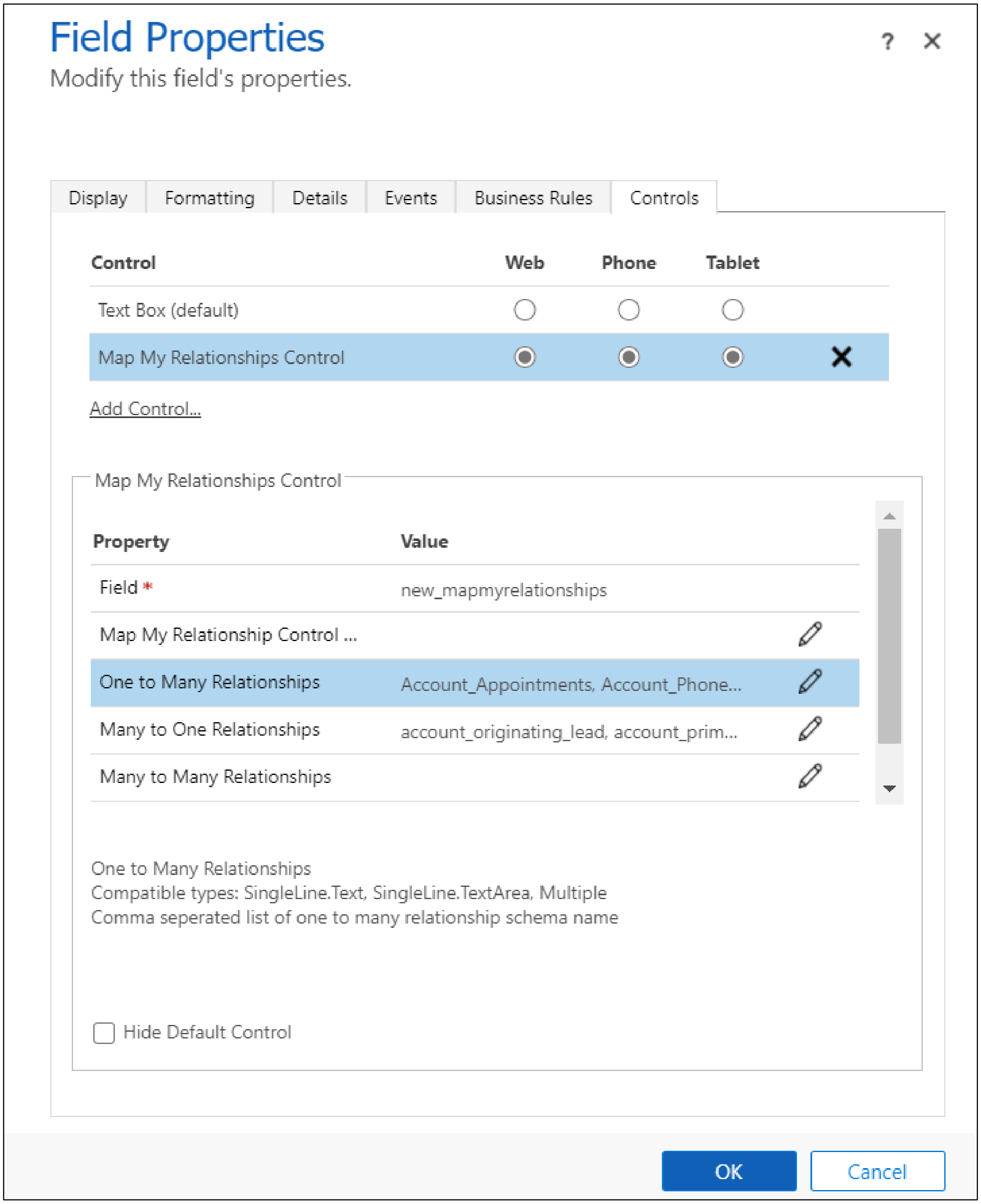
7. Repeate the above step for the other properties and fill the details.



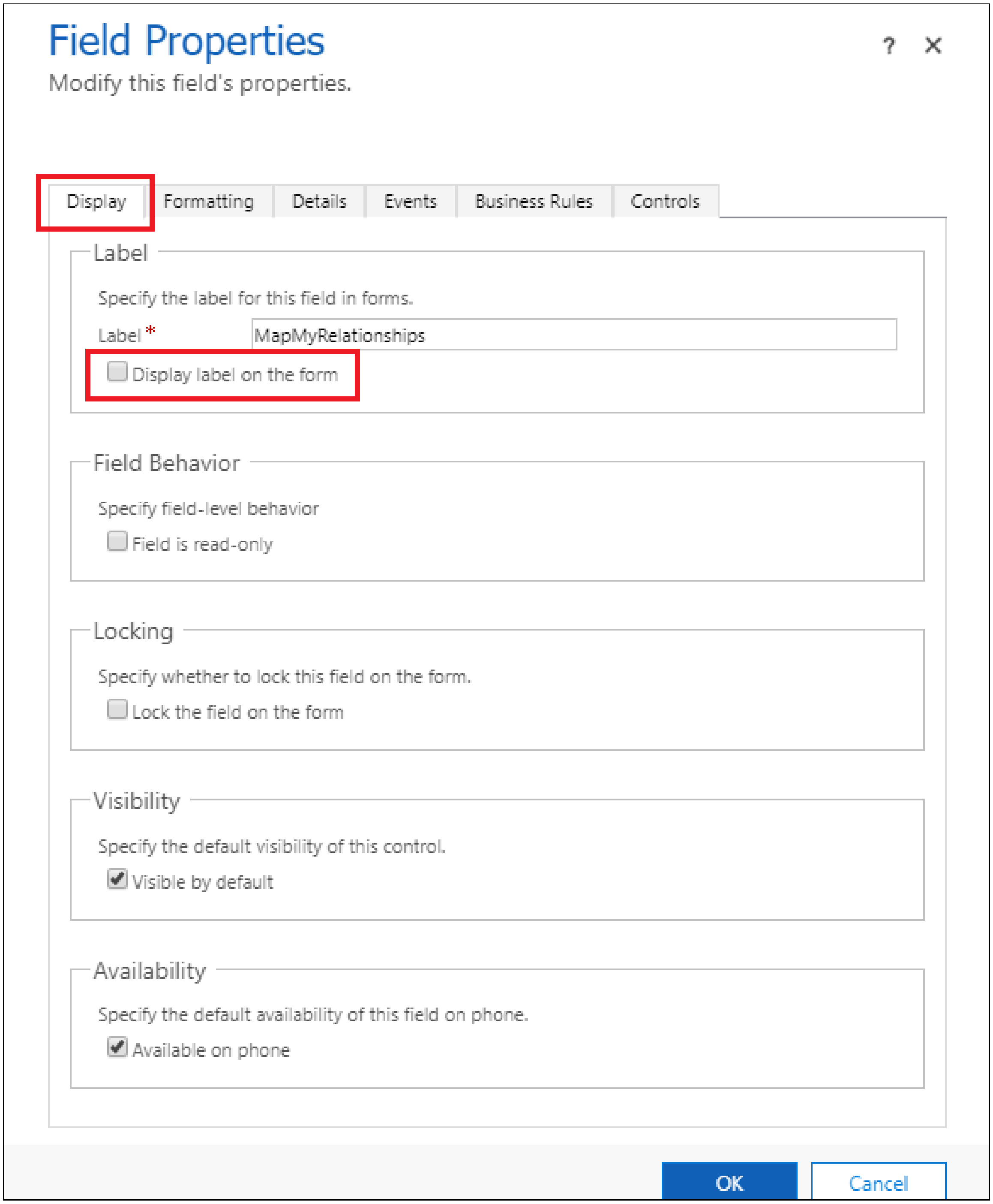
Allow Actions?: Specify whether the user should be able to perform actions such as Create Email, Create Phone Call or Create Task. Enter 0 for Yes and 1 for No. Default is Yes i.e. 0.



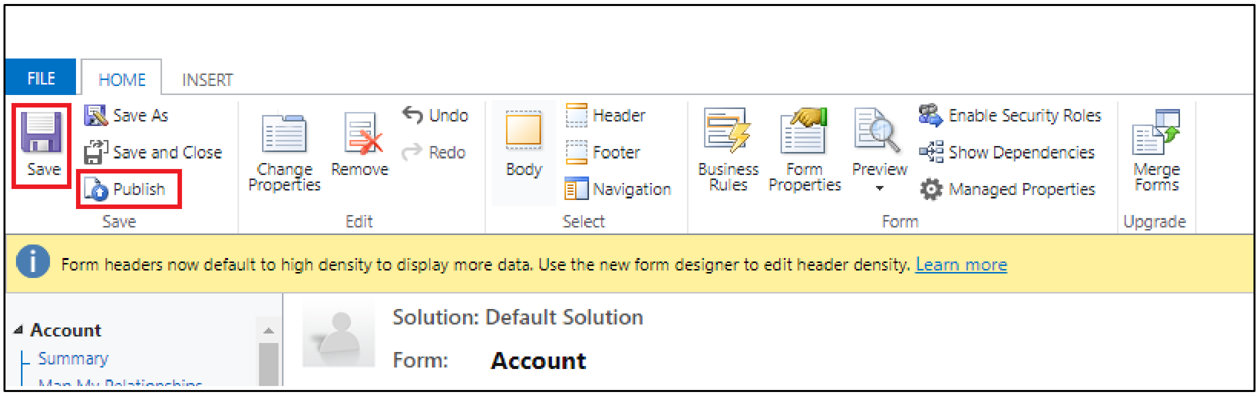
8. Select the device where the control should be displayed. Click ‘OK’ to save changes.



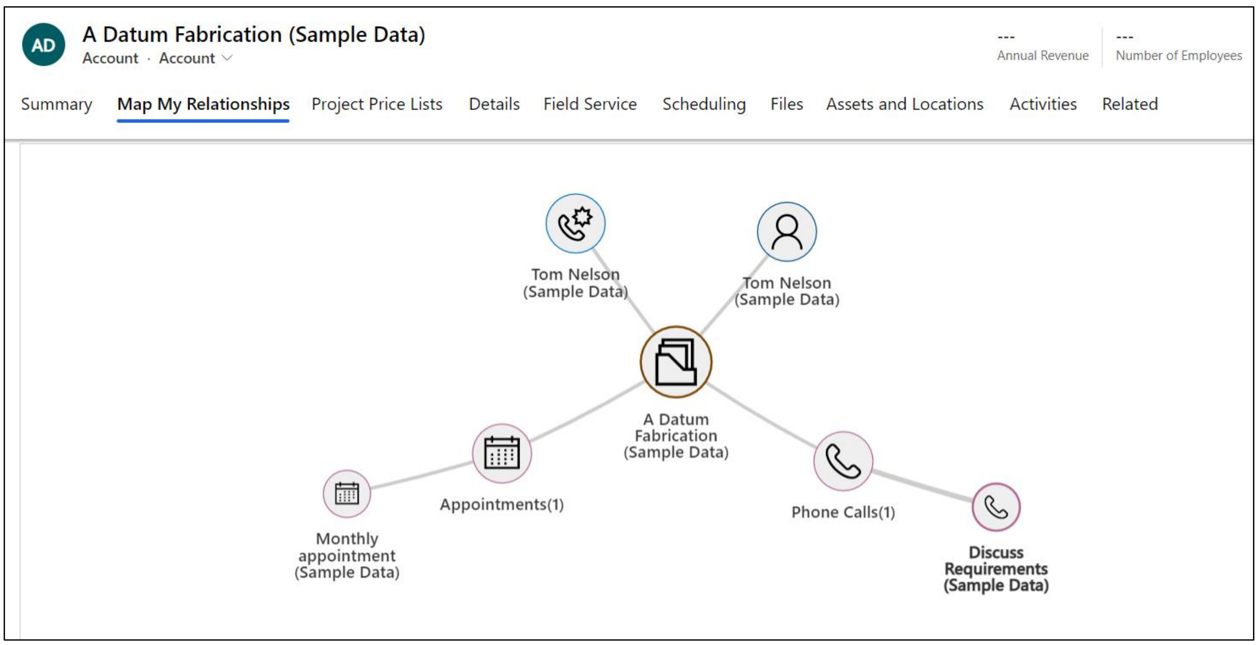
9. Go to 'Display' field properties and uncheck 'Display label on the form'.



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.

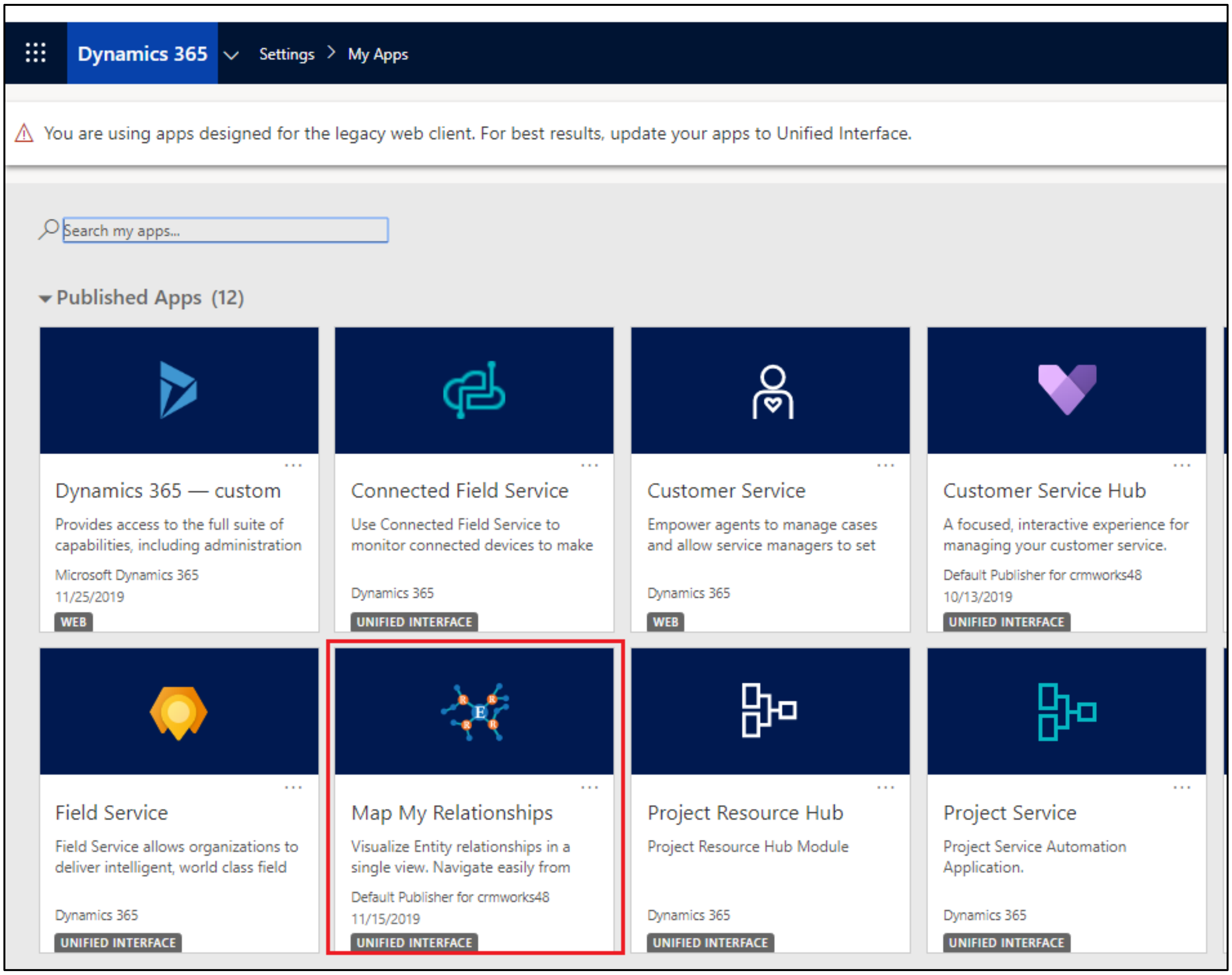
Map My Relationships – Advance Configuration

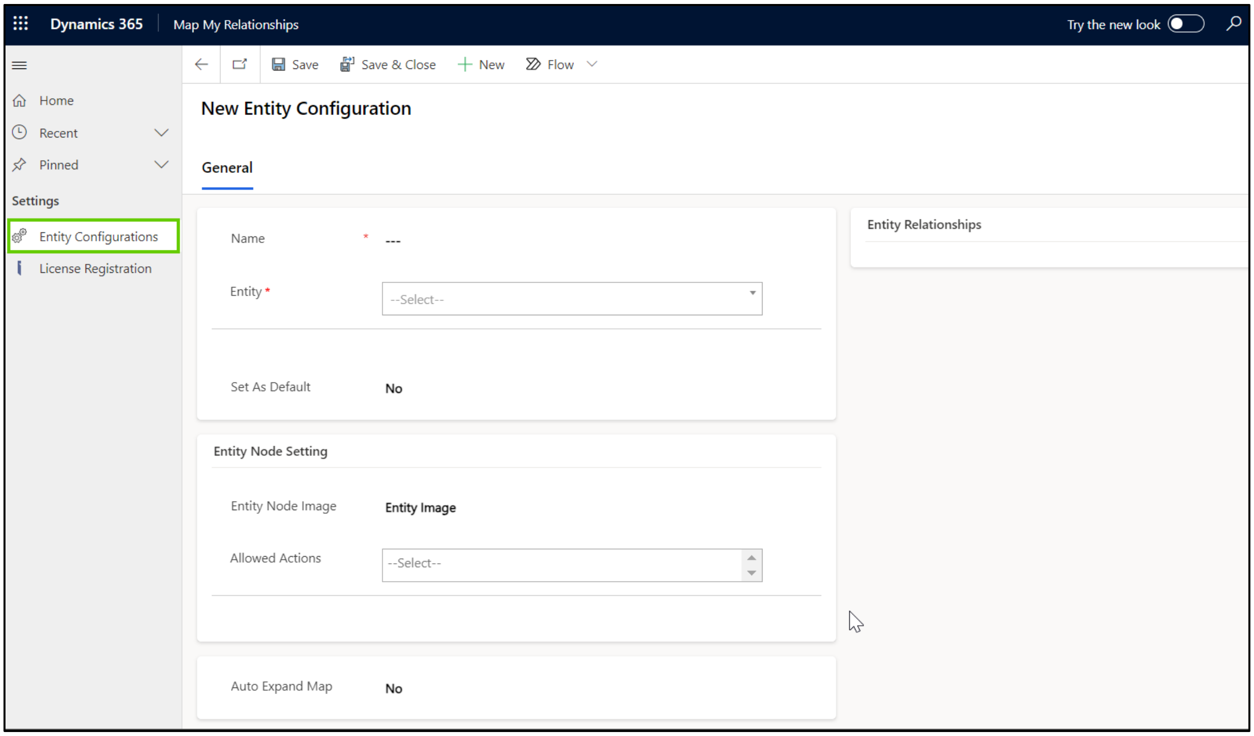
General configuration details:

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.

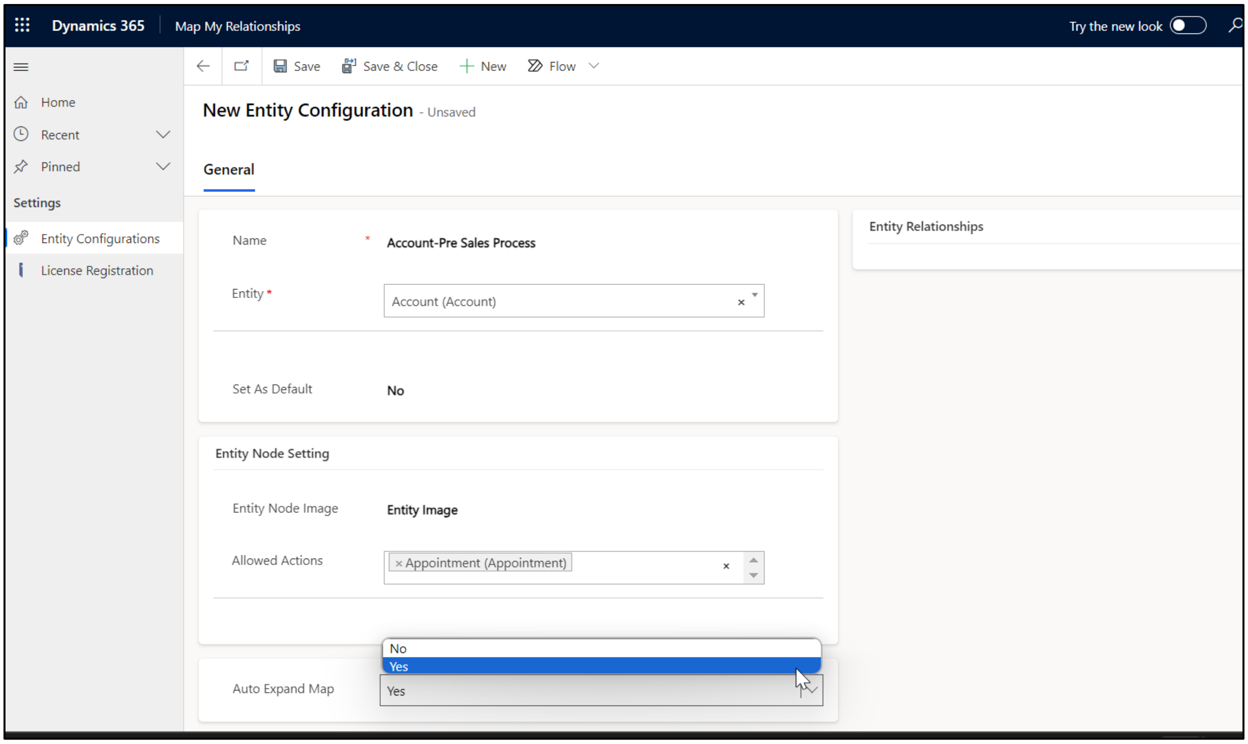
1. **Entity Configuration:** This entity enables the system administrator to define for which entity the Map My Relationships view should be displayed.

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

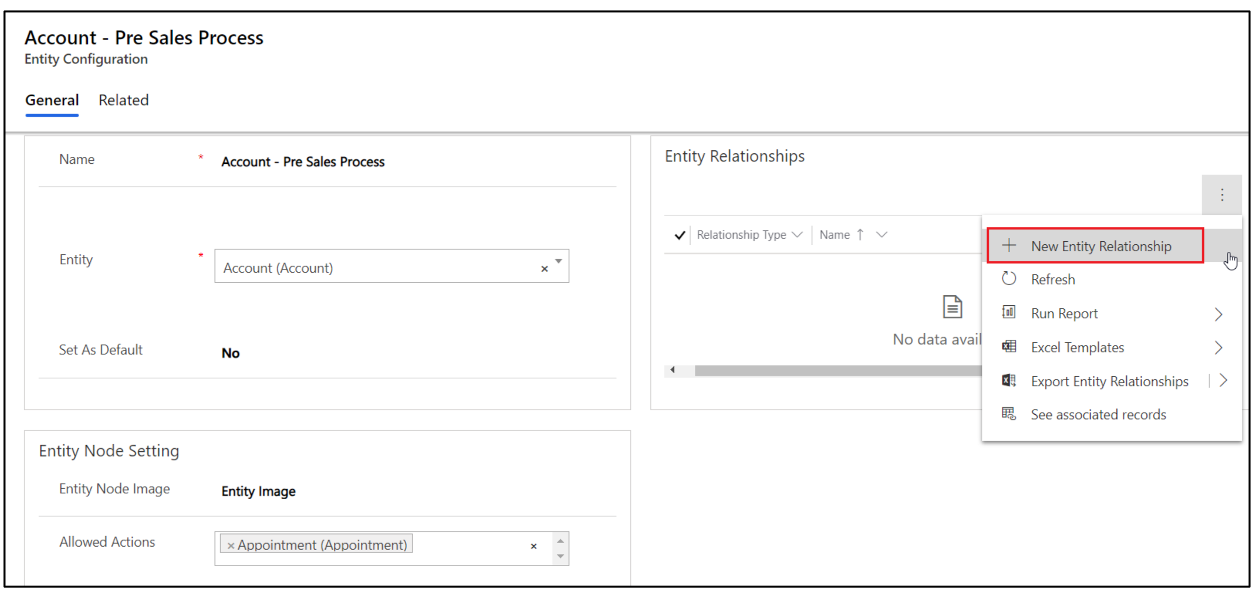


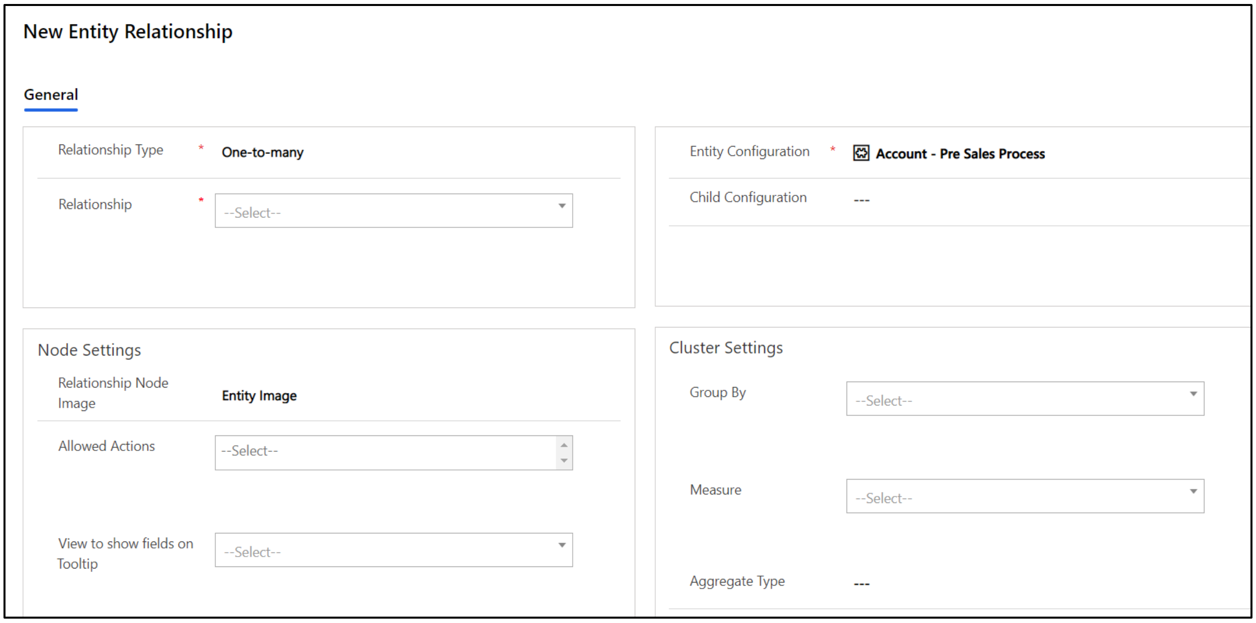


- **Name**: Enter user friendly name for the record. This name will be used in the value for 'Map My Relationships Control Configuration' field property.
- **Entity**: Select the entity from the list of entity. This tells the control that the configuration is for the selected entity.
- **Set As Default**: 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'

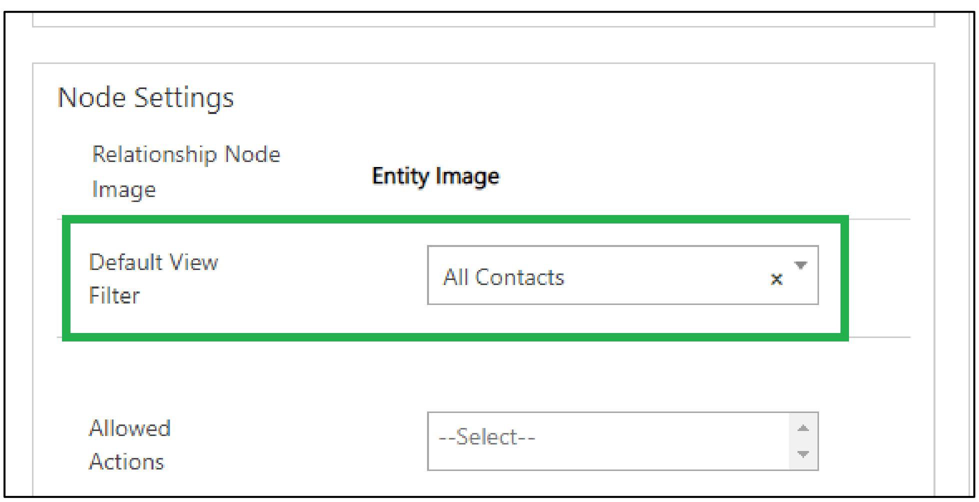


2. **Entity Relationships:** This allows the administrator to define which related records needs to be displayed on the Map My Relationships control/View. Create and Add Entity Relationships records from the subgrid of Entity Configuration record.

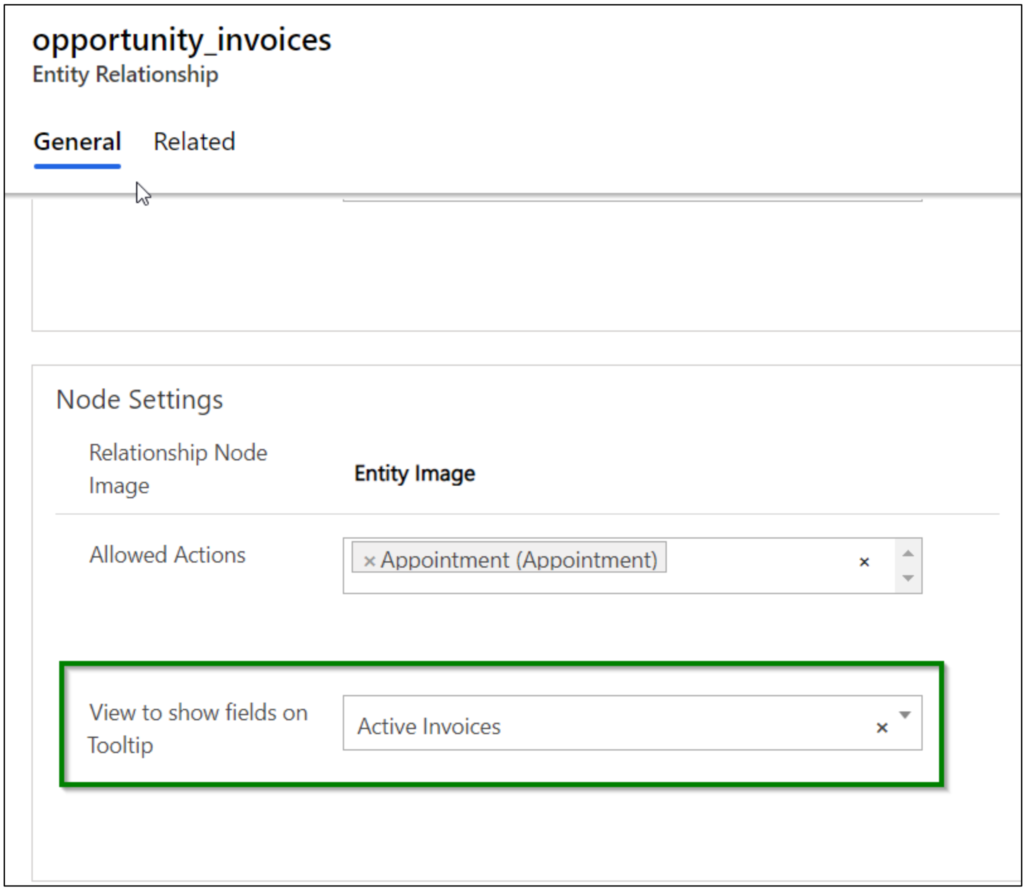




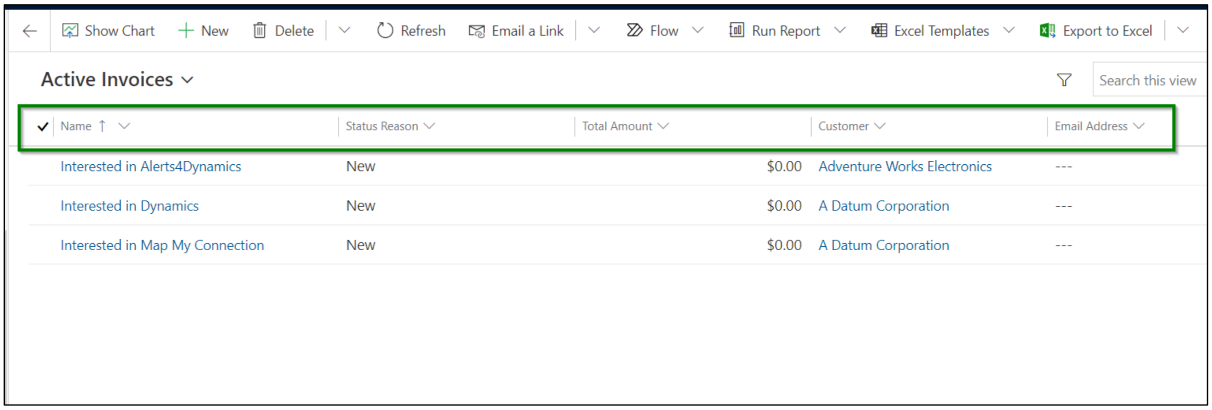
- **Relationship Type**: Choose which type of relationship you want to add. Options are 'One-to-Many', 'Many-to-One' and 'Many-to-Many'.
- **Relationship**: Select the relationship from the list of relationship. This get filtered based on the option selected in the 'Relationship Type' field.
- **Relationship 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.



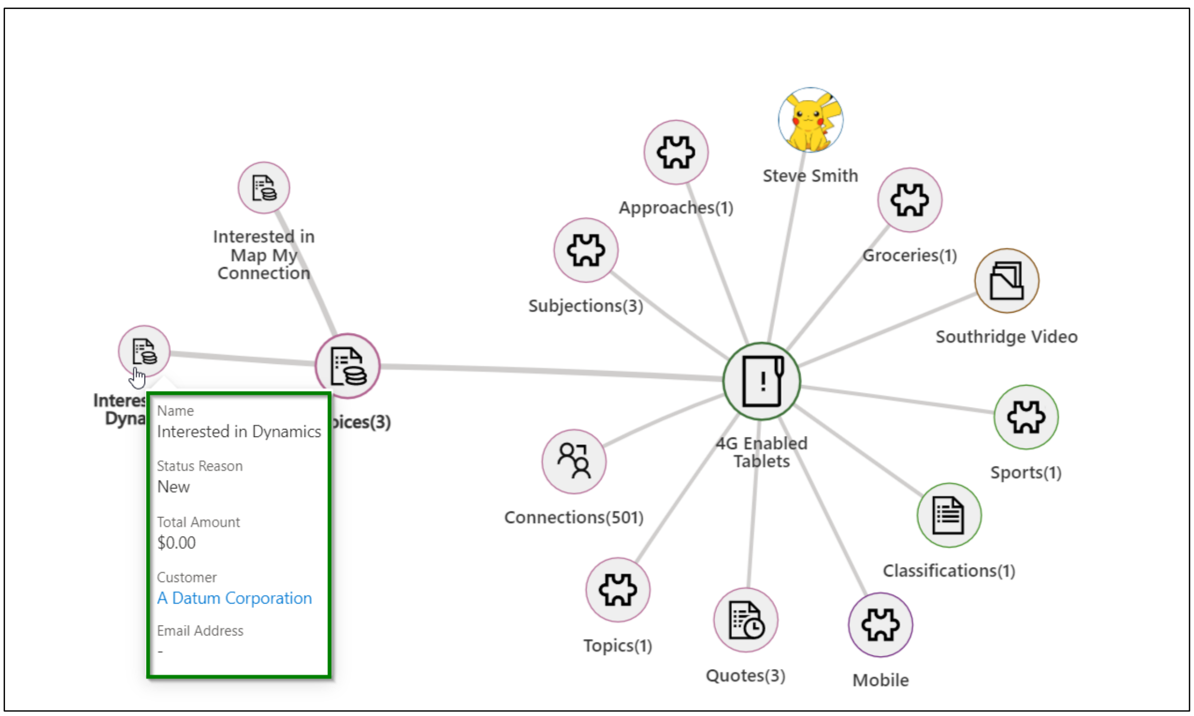
- **Allowed Actions**: A list of activities present in the system. Select multiple activities from the list. The selected activities will be available for the user to create activities against the related record.
- **View to show fields on Tooltip**: A list of fields of the related entity selected as 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 -



Columns present under **'Active Invoices'** view –

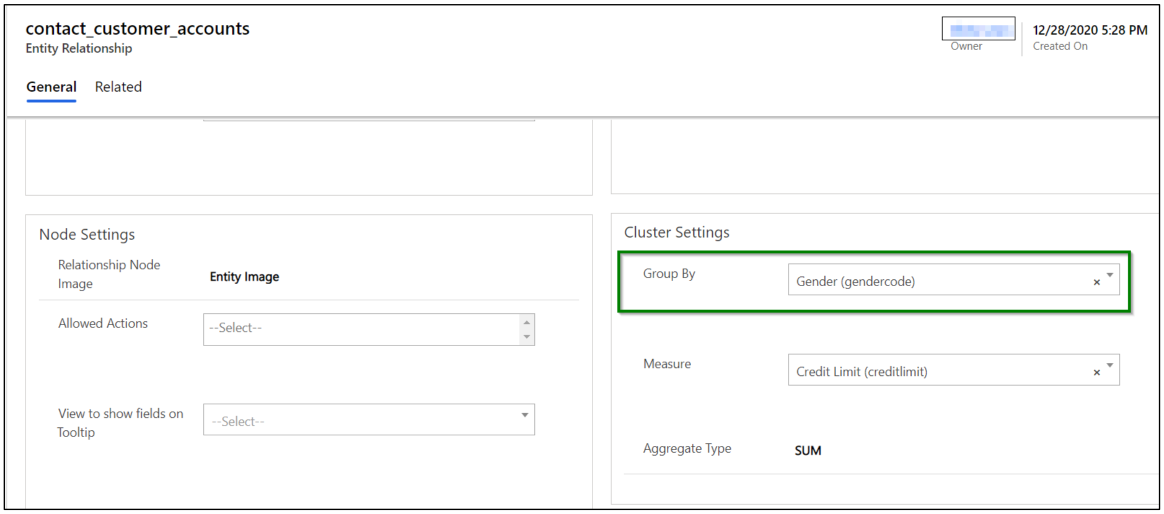


Information shown on hovering over the respective entity record –

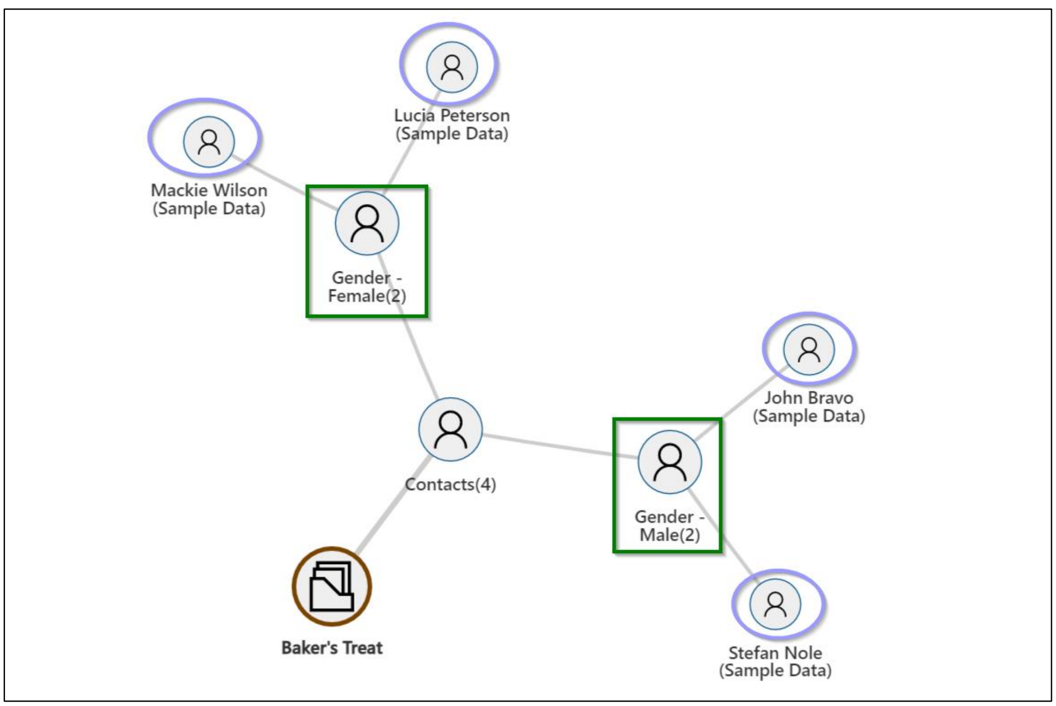


- **Child Configuration**: A list of Entity Configurations will be available. Select one such configuration to further drill down through the relationship and see associated entity records.

- **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:



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:

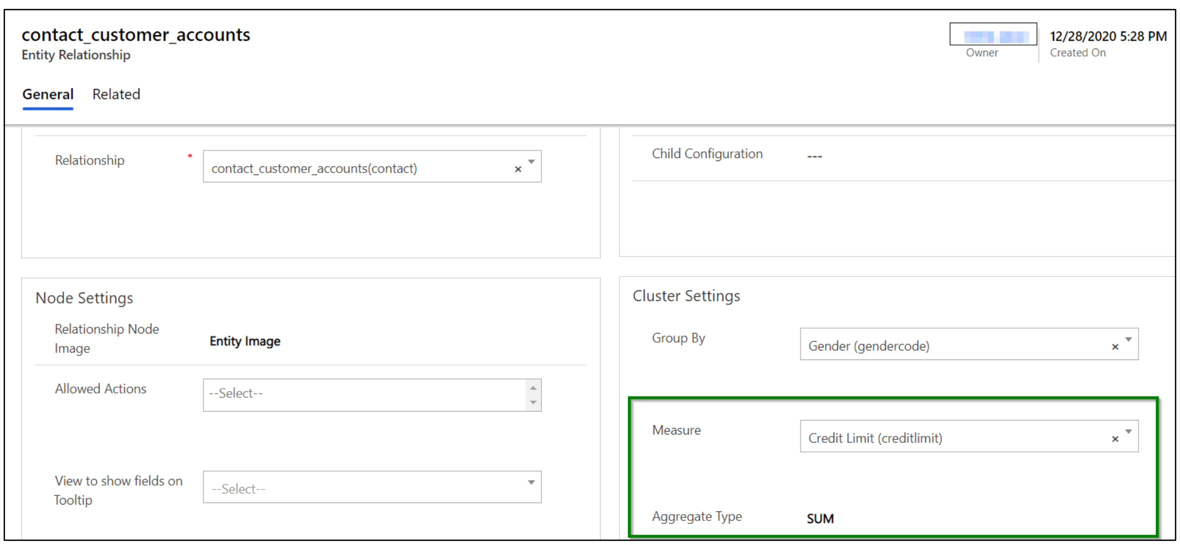
Contact 1 (Female) – Rs. 1,000

Contact 2 (Female) – Rs. 1,500

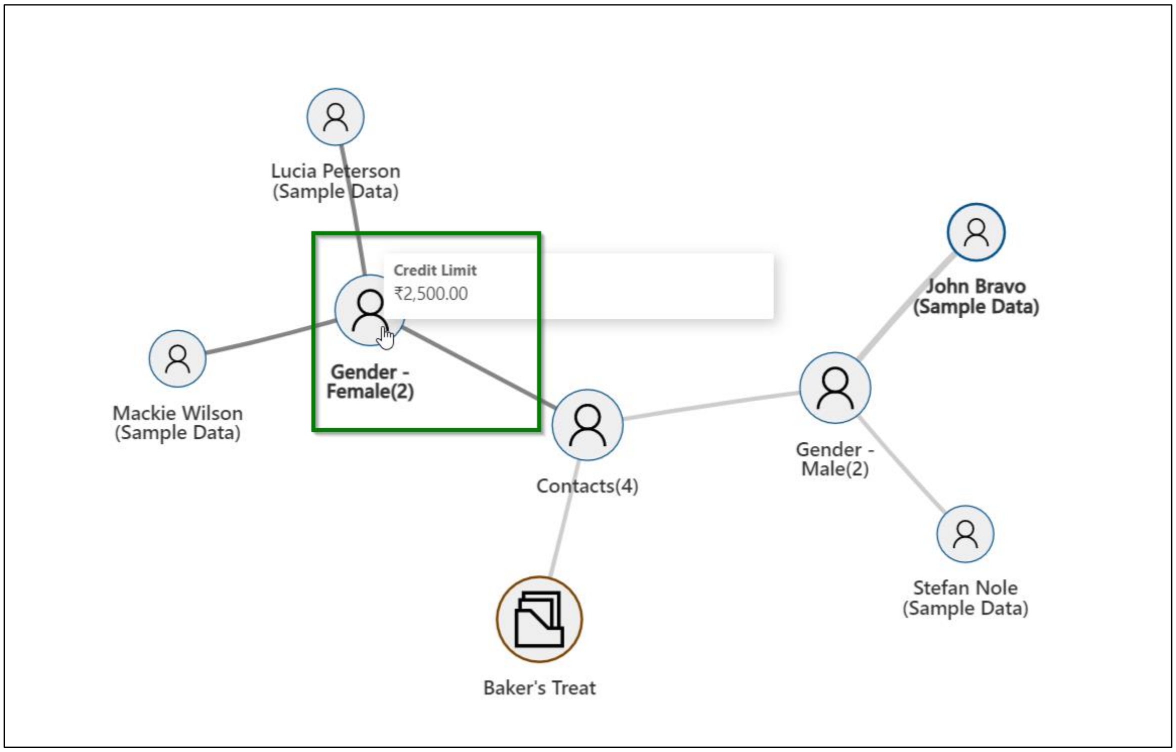
Contact 3 (Male) – Rs. 500

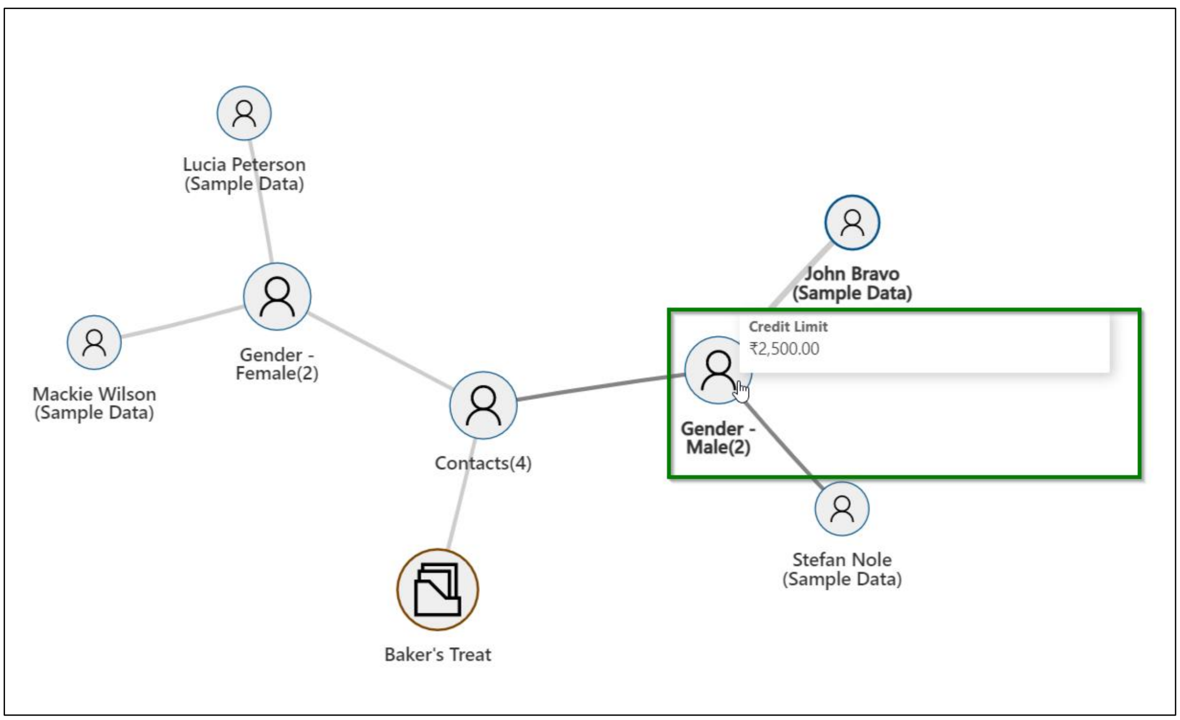
Contact 4 (Male) – Rs. 2,000

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

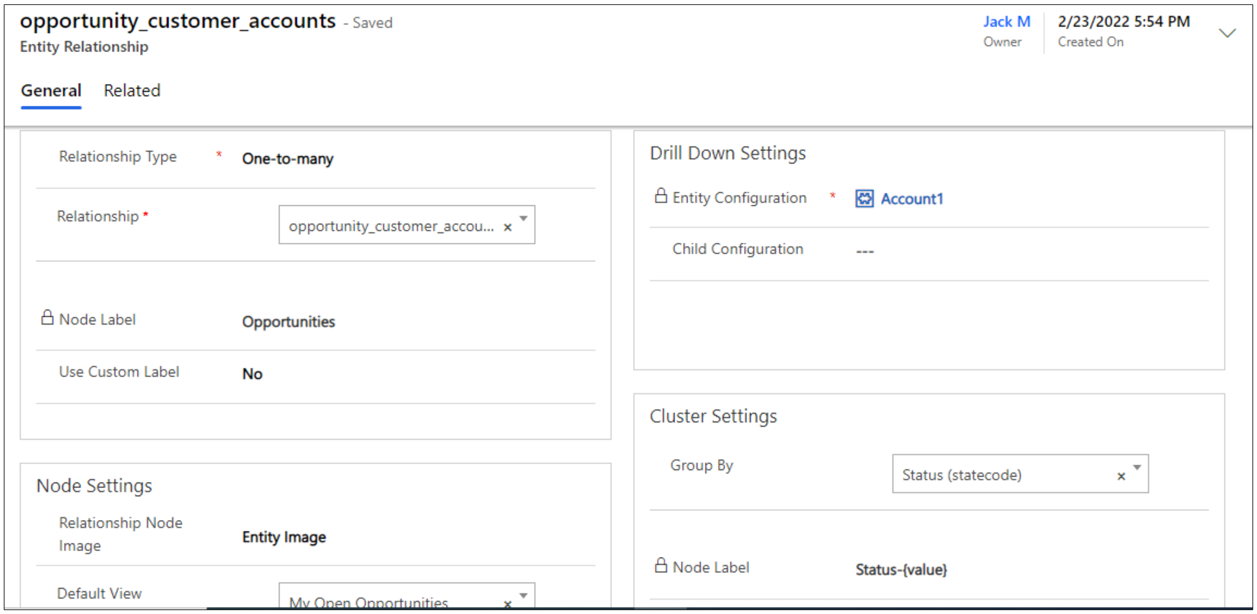


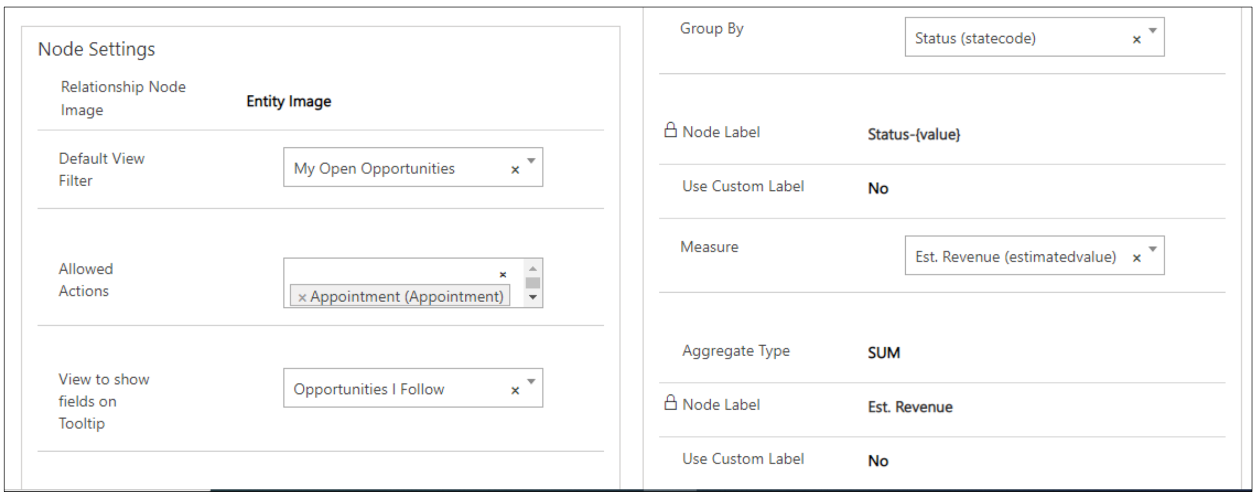
On hovering over the group node, it will show the calculated value of Credit limit as a sum.





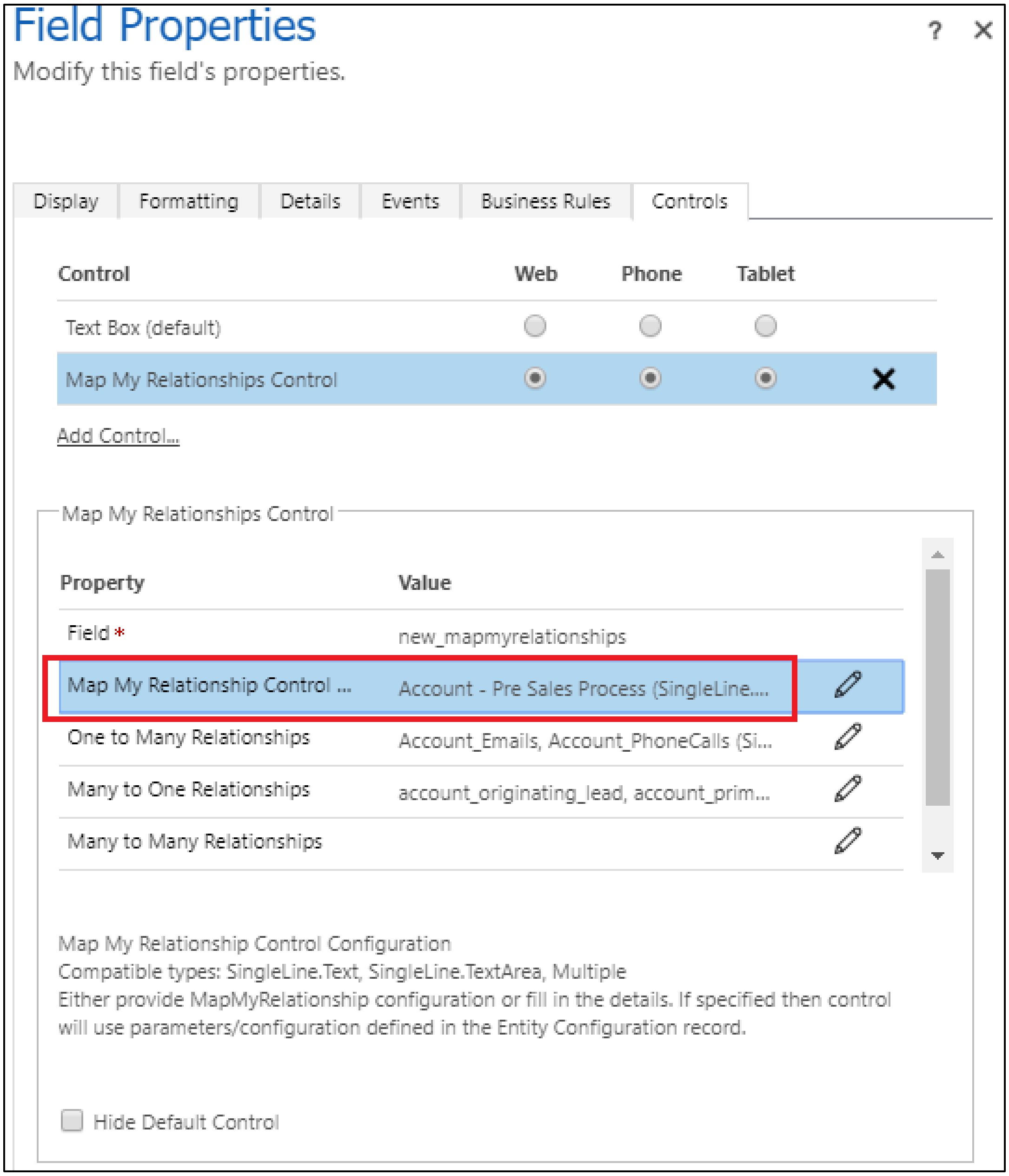
After filling all the respective fields, click on **Save**.

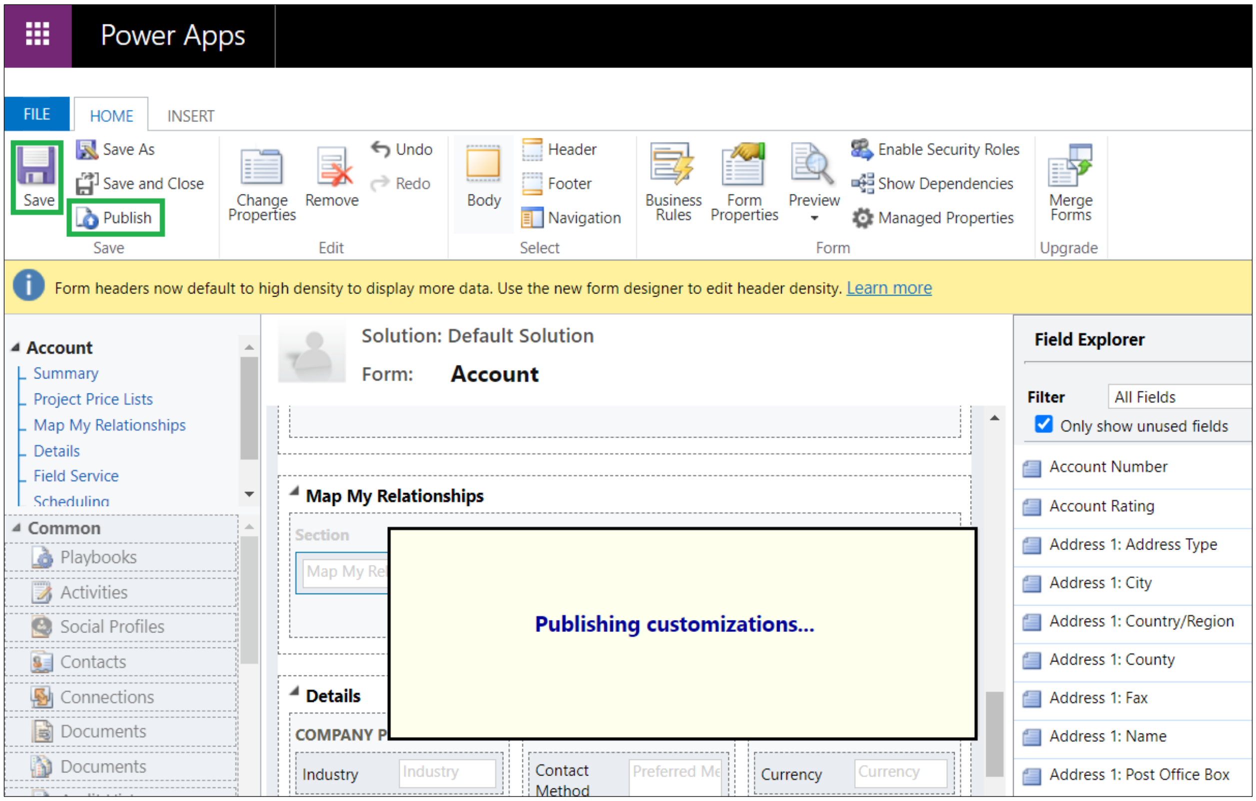




3. **Use advanced configuration:** Once the Entity Configuration and Entity Relationship entity records has been created, perform the steps to add Map My Relationships control on the form. **Steps from 'Map My Relationships Basic Configuration' section.**

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


Field Properties
Modify this field's properties.
Display
Formatting
Details
Events
Business Rules
Controls
Control
Web
Phone
Tablet
Text Box (default)
Map My Relationships Control
Add Control...
Map My Relationships Control
Property
Value
Field *
new_mapmyrelationships
Map My Relationship Control ...
Account - Pre Sales Process (SingleLine....
One to Many Relationships
Account_Emails, Account_PhoneCalls (Si...
Many to One Relationships
account_originating_lead, account_prim...
Many to Many Relationships
Map My Relationship Control Configuration
Compatible types: SingleLine.Text, SingleLine.TextArea, Multiple
Either provide MapMyRelationship configuration or fill in the details. If specified then control will use parameters/configuration defined in the Entity Configuration record.
Hide Default Control



Drill down through relationships:

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

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

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

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

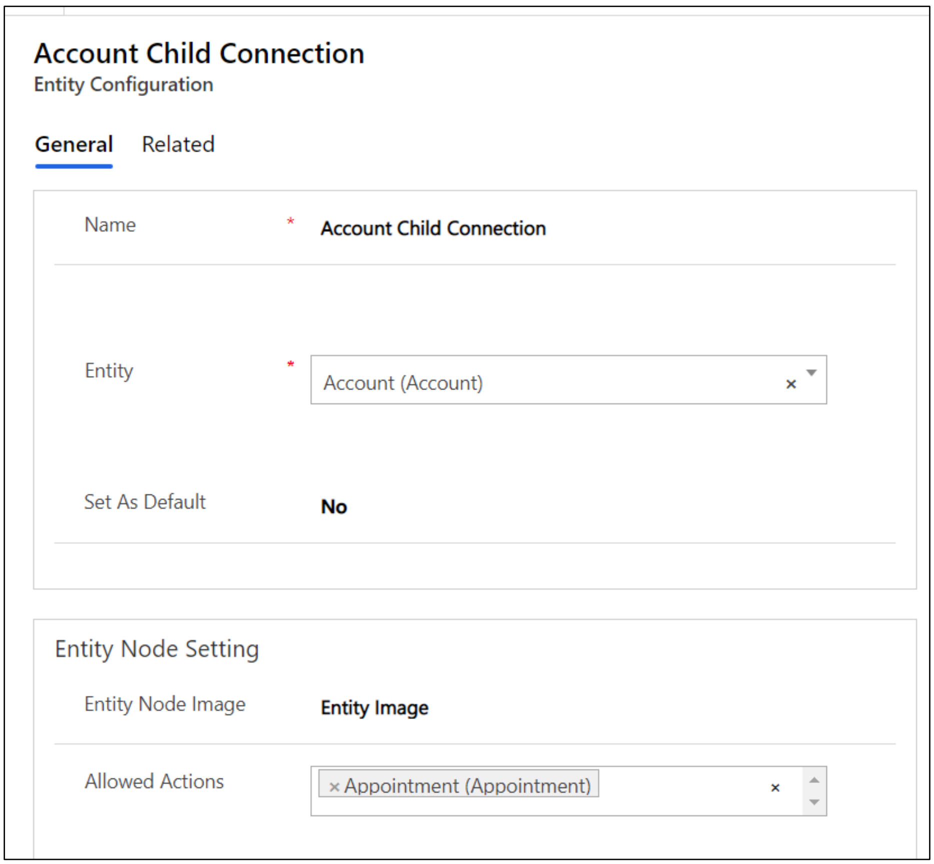
Before we begin, we will have to keep these pre-requisites in mind:

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

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

Entity configuration:

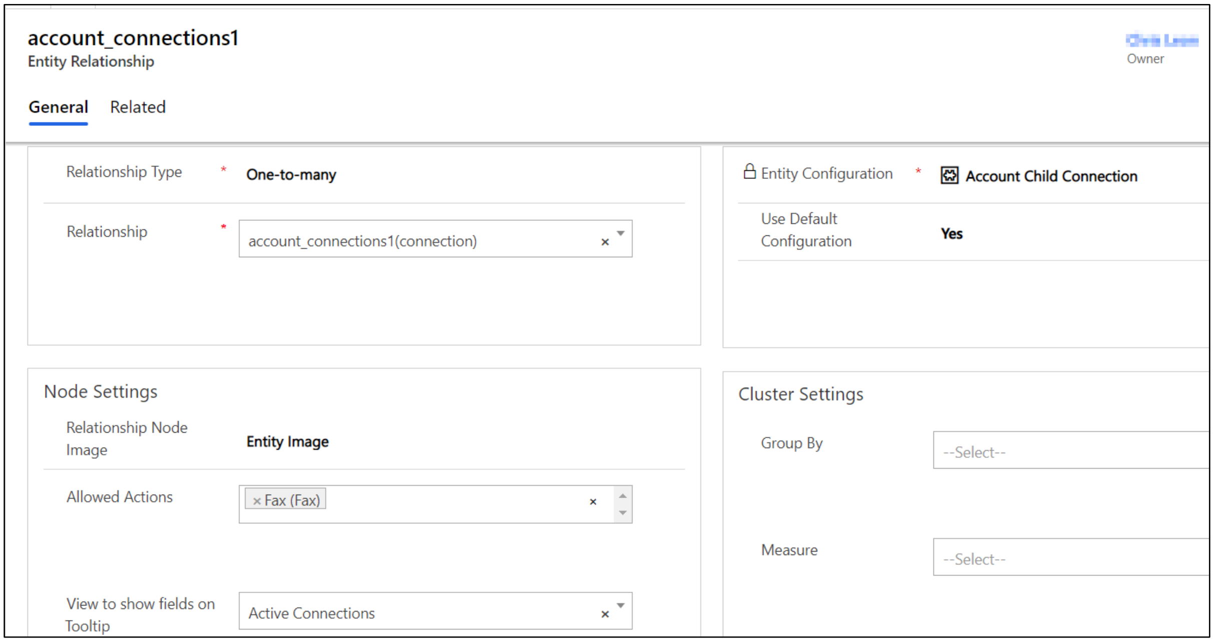
- **Name:** Give a valid name for configuration.
- **Entity:** Account (as we want to see the connection record of an account).
- **Set As Default:** Can be ignored for this occasion since this field won't play any role here in this scenario because this is not going to be used as a child configuration.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

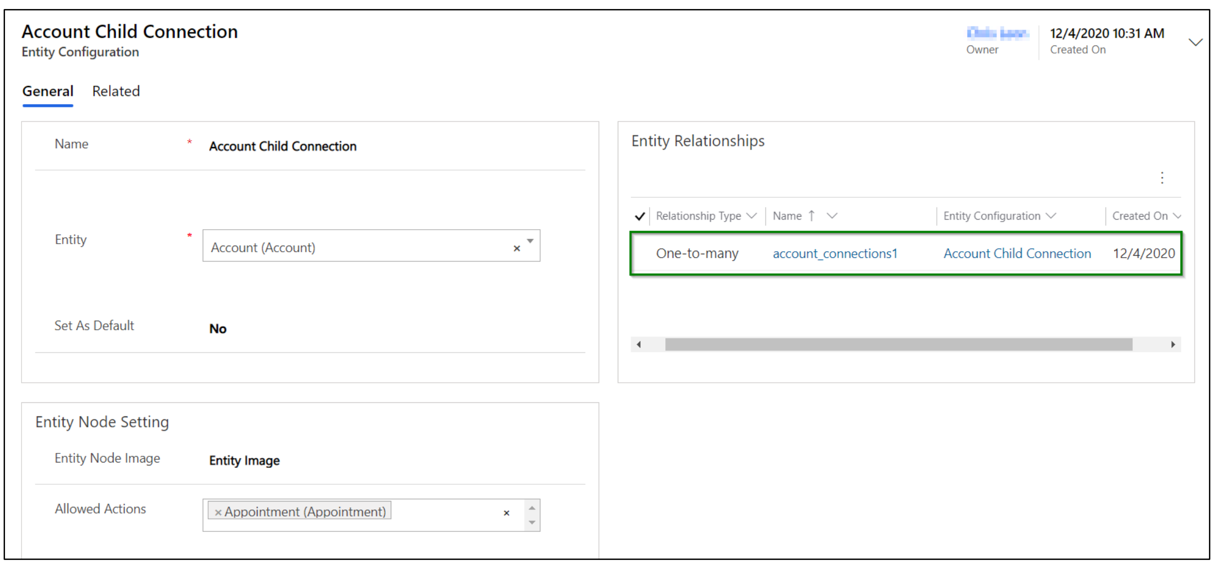


Relationship configuration:

- **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).



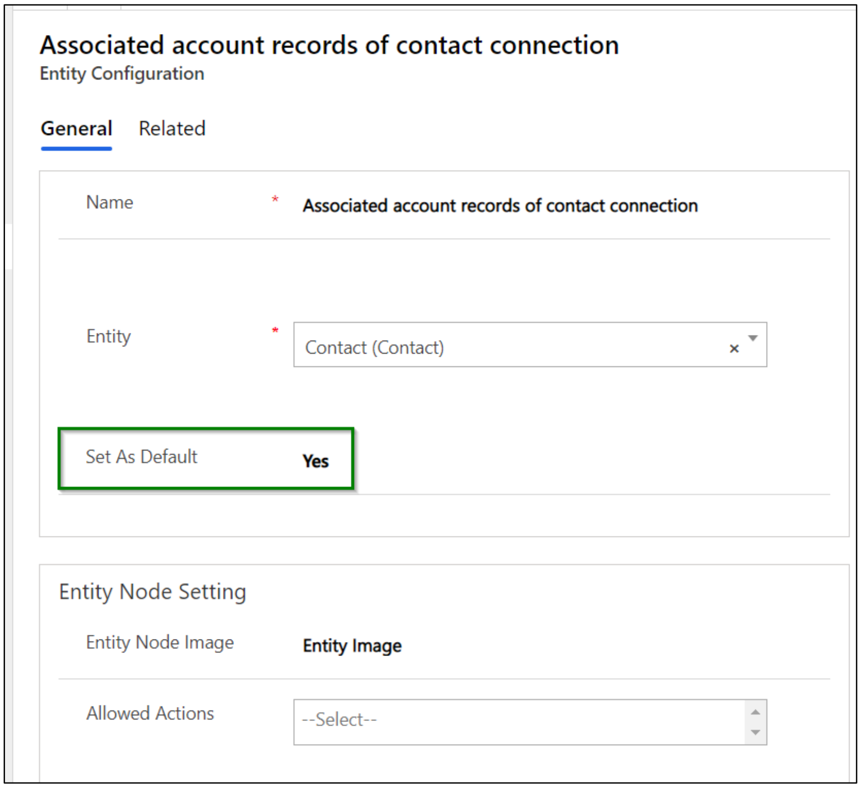


3) Next, let's create another entity configuration for **'Contact'** to see further associated account records of the contact connection, and set it to default as **'Yes'** as shown below:

Entity configuration:

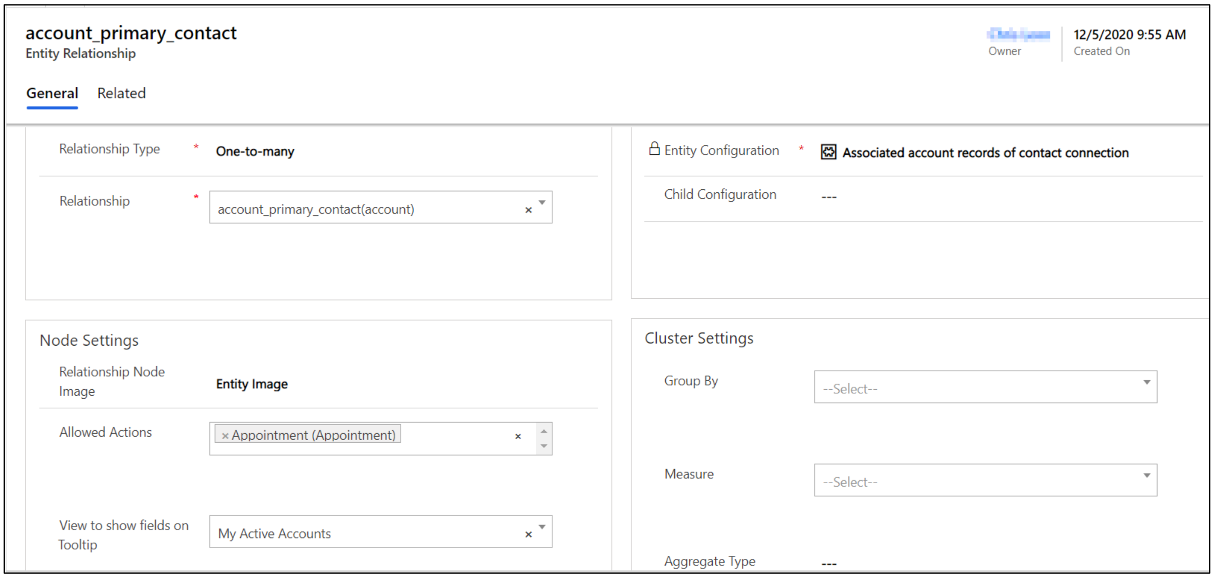
- **Name:** Give a valid name for configuration.
- **Entity:** Contact

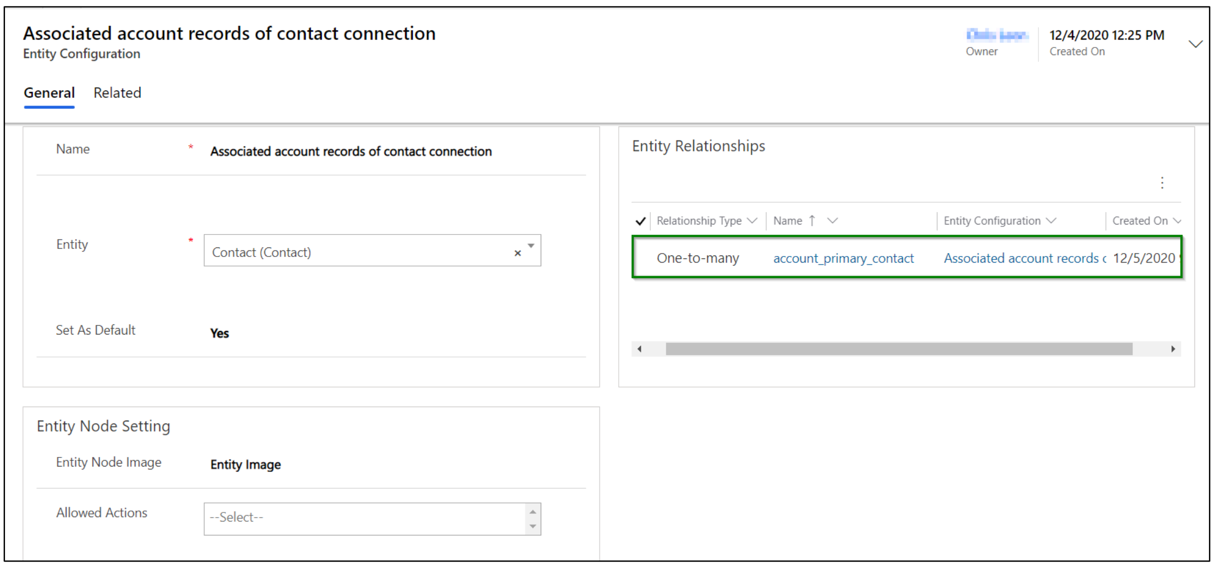
- **Set As Default:** Yes (Here, we need to set this as 'Yes' which is already enabled in the connection relationship configuration that we have configured earlier above).
- **Entity Node Image:** As required.
- **Allowed Actions:** As required.



Relationship configuration:

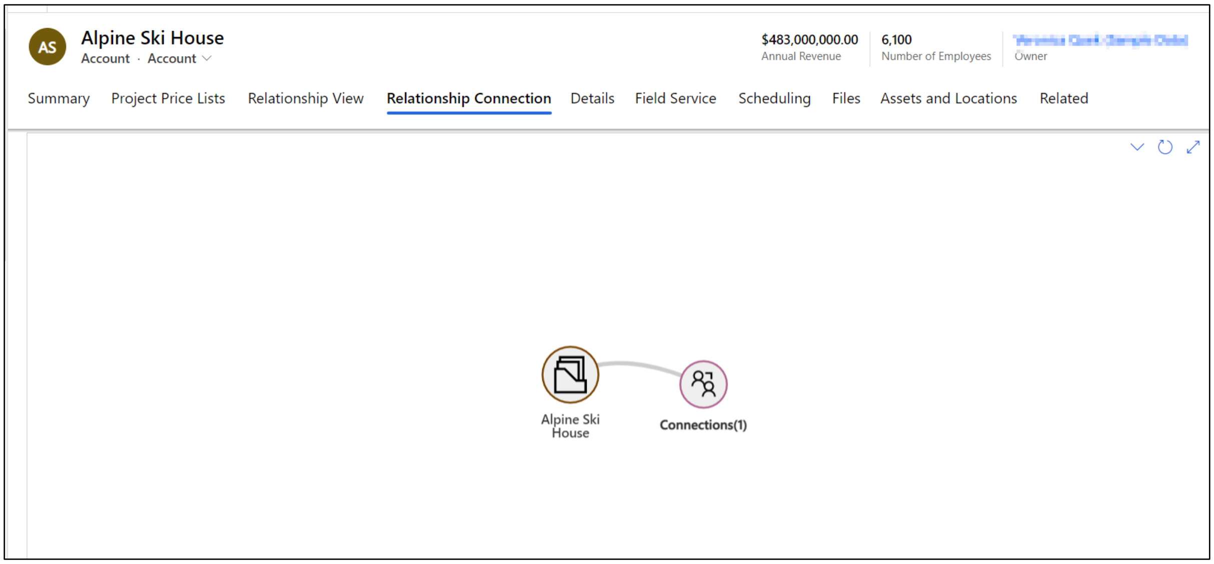
- **Relationship Type:** One to Many.
- **Relationship Type:** account_primary_contact(account).
- **Relationship Node Image:** As required.
- **Allowed Actions:** As required.
- **View to show fields on Tooltip:** My Active Accounts.
- **Child Configuration:** Leave this blank since we don't want to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



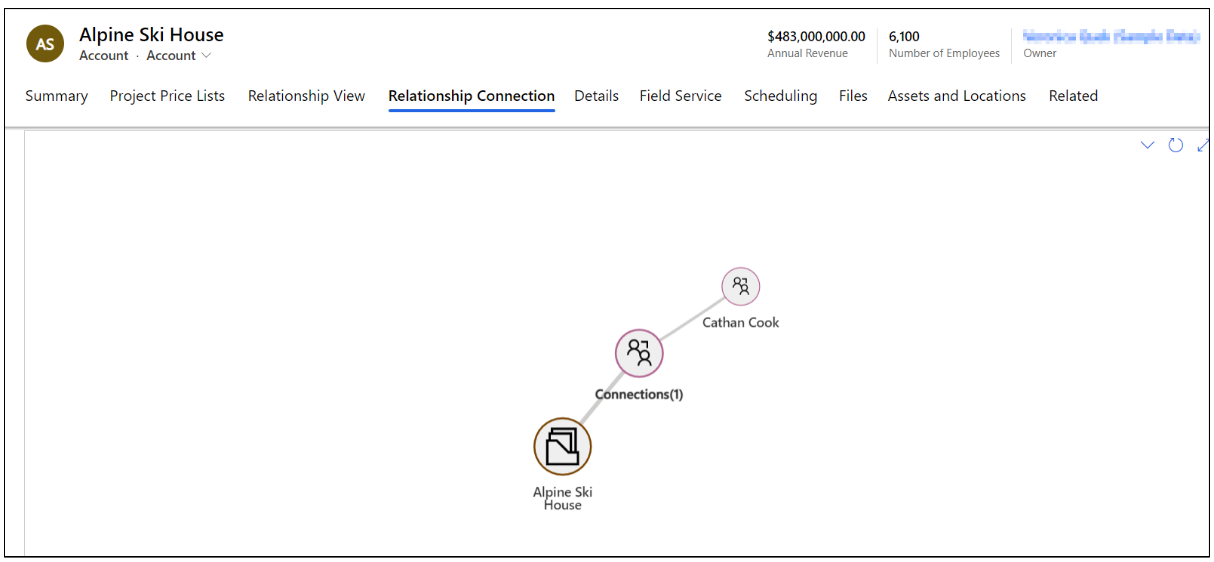


Note - At a time, application will accept only one entity configuration set as default to be used as a child configuration to see the associated entity records of the connection (associated account records of contact connection in this instance).

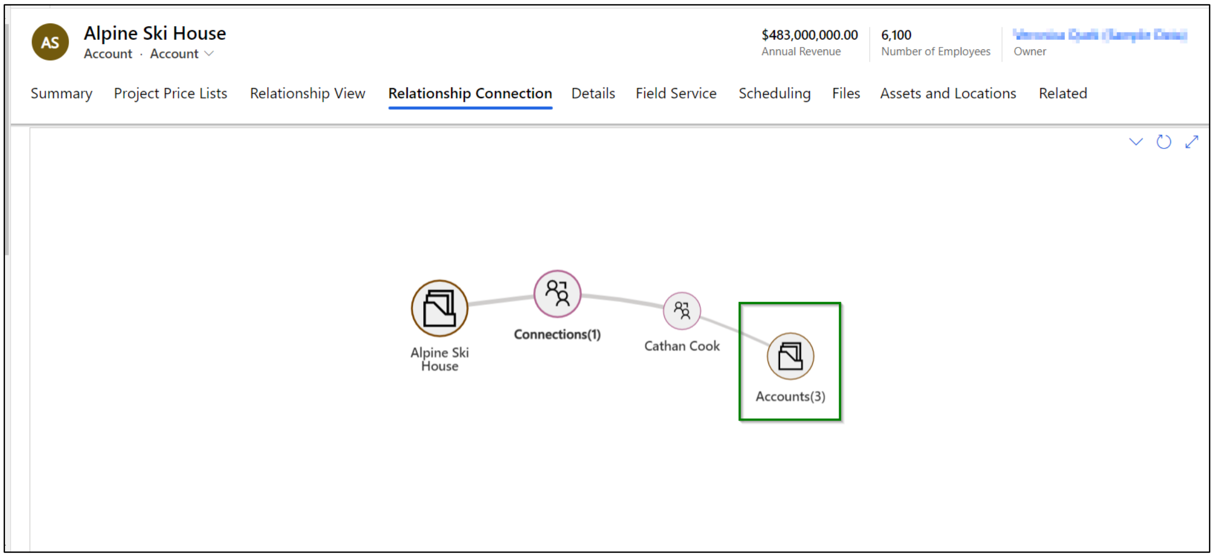
4) Now, navigate to **Account entity → Open a record → Click on 'Relationship Connection'**.



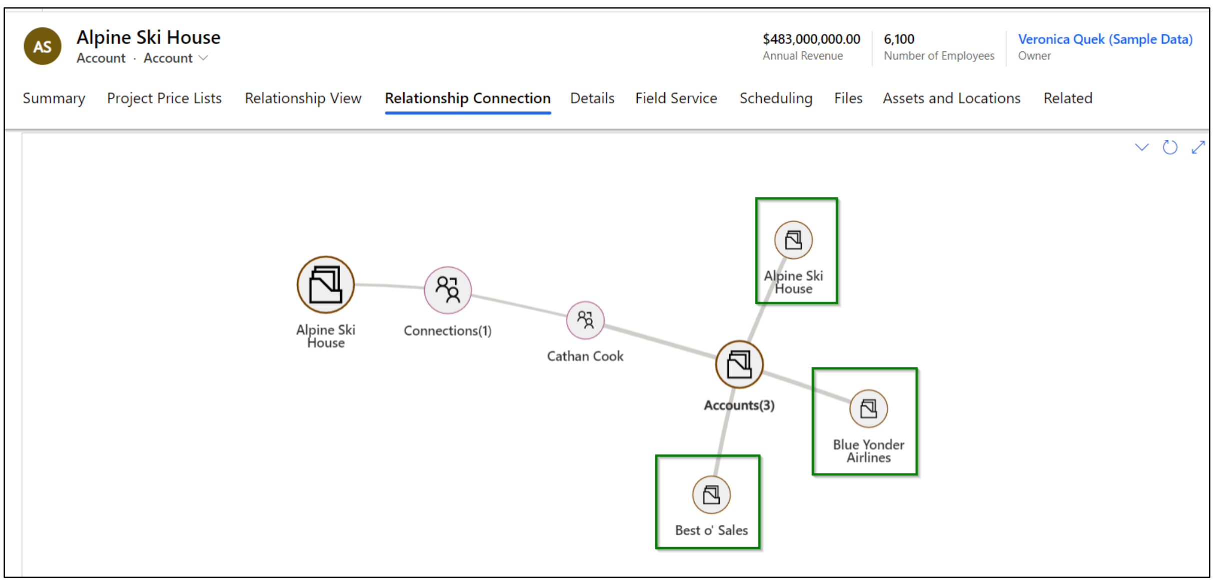
5) Double click on **'Connections'** to expand it and it will show a connection record.



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



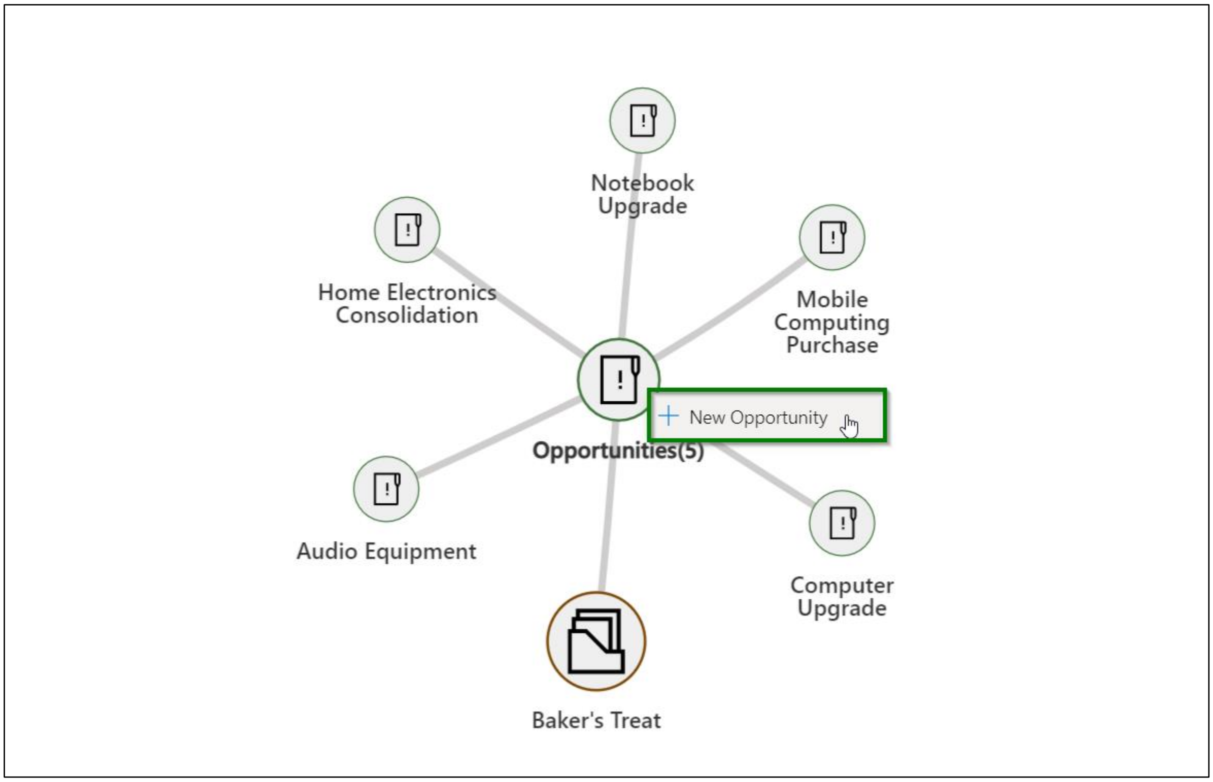
7) Again double click on **'Accounts'** to expand it and it will show the associated account records of the contact connection record '**Cathan Cook**'.



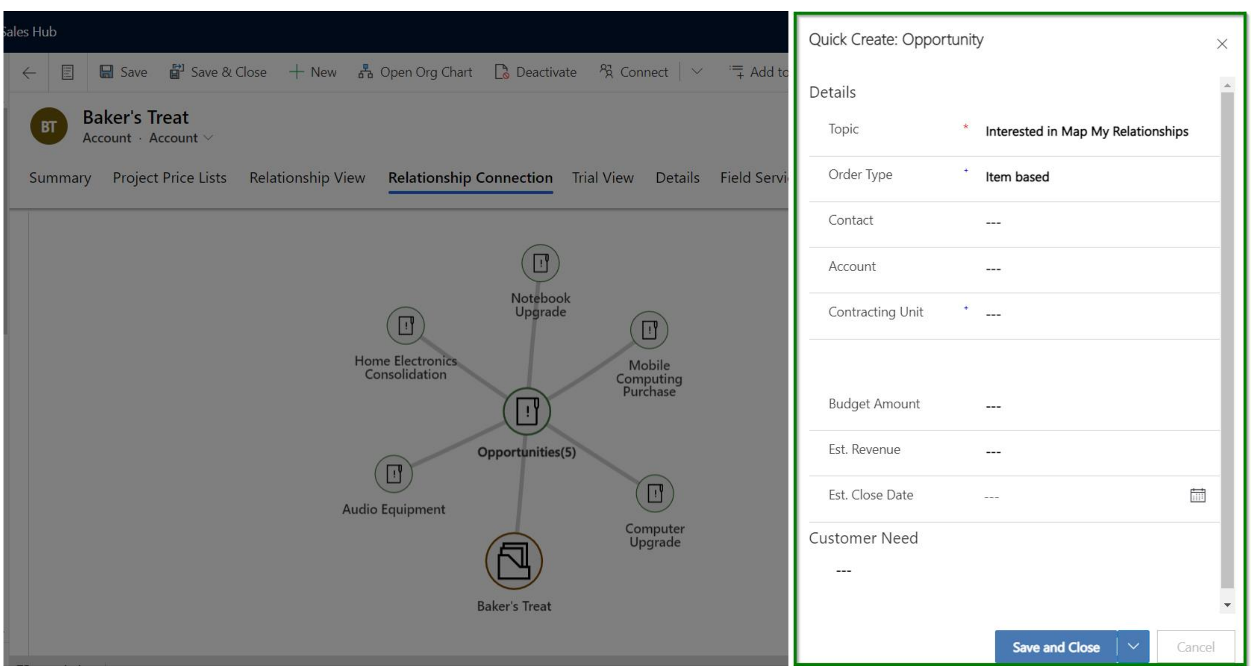
Using this approach, you will be able to drill down through the connection relationship to see its related entity records i. e. accounts in this illustration.

New entity record creation through relationship view

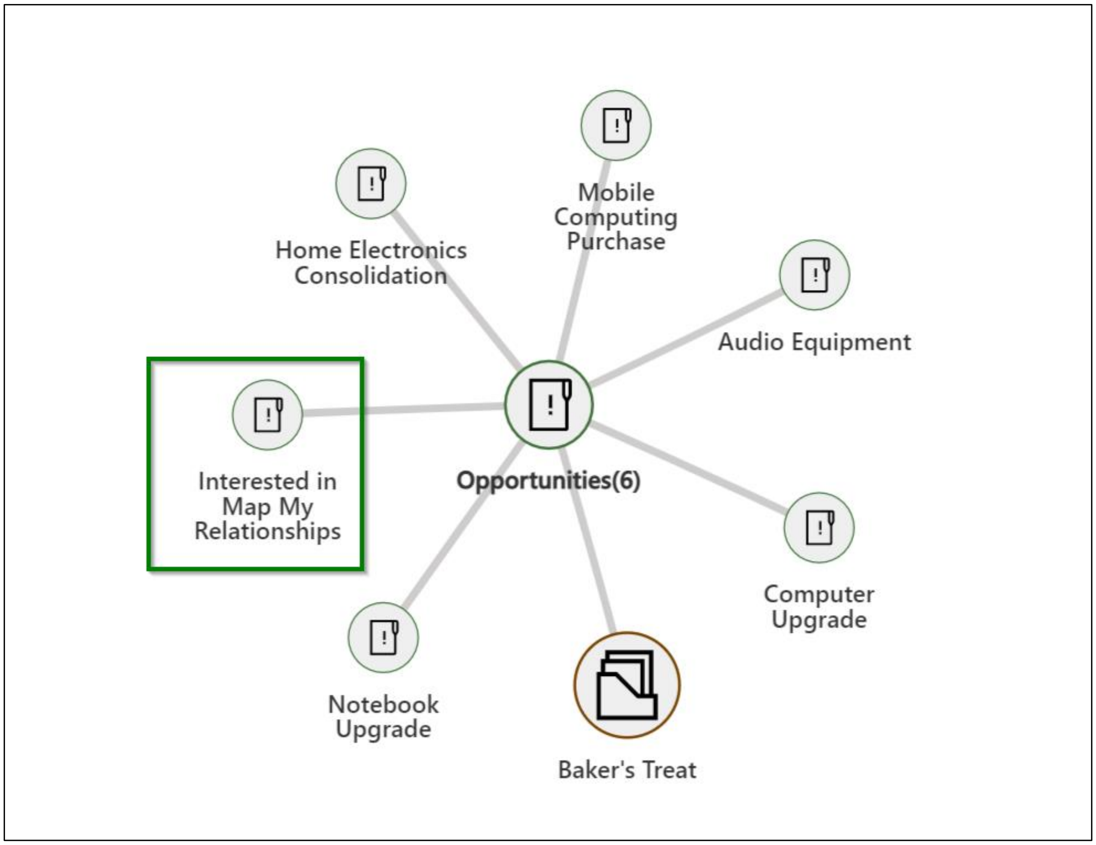
User is now provisioned to be able to quickly create a new entity record through the relationship view.



It will open up a quick create form.



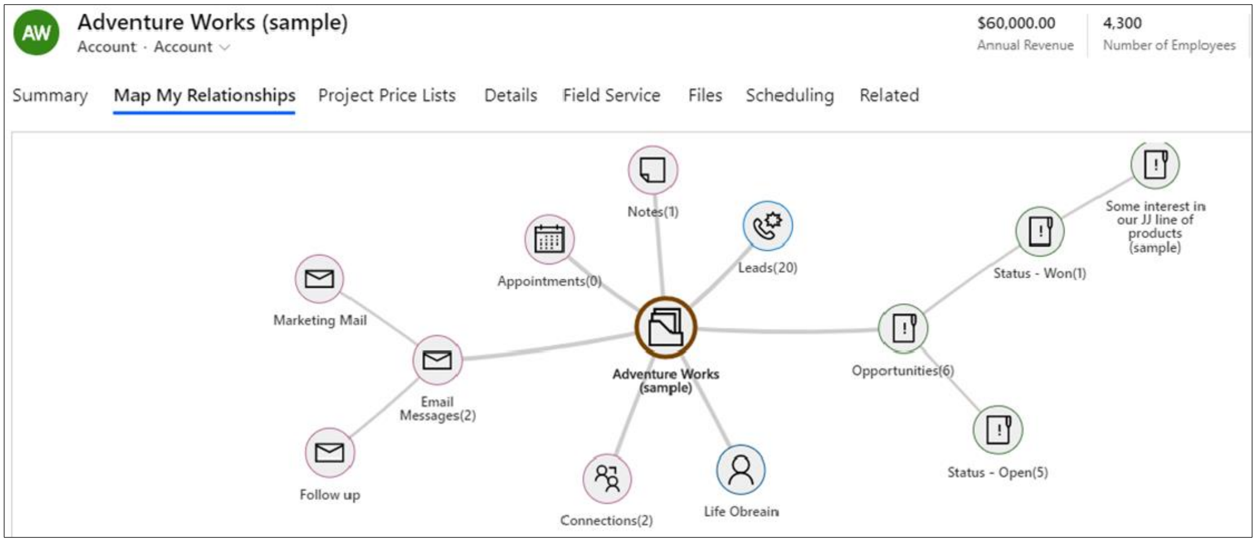
After the record is created, the newly added record will start showing in the relationship view.



Features

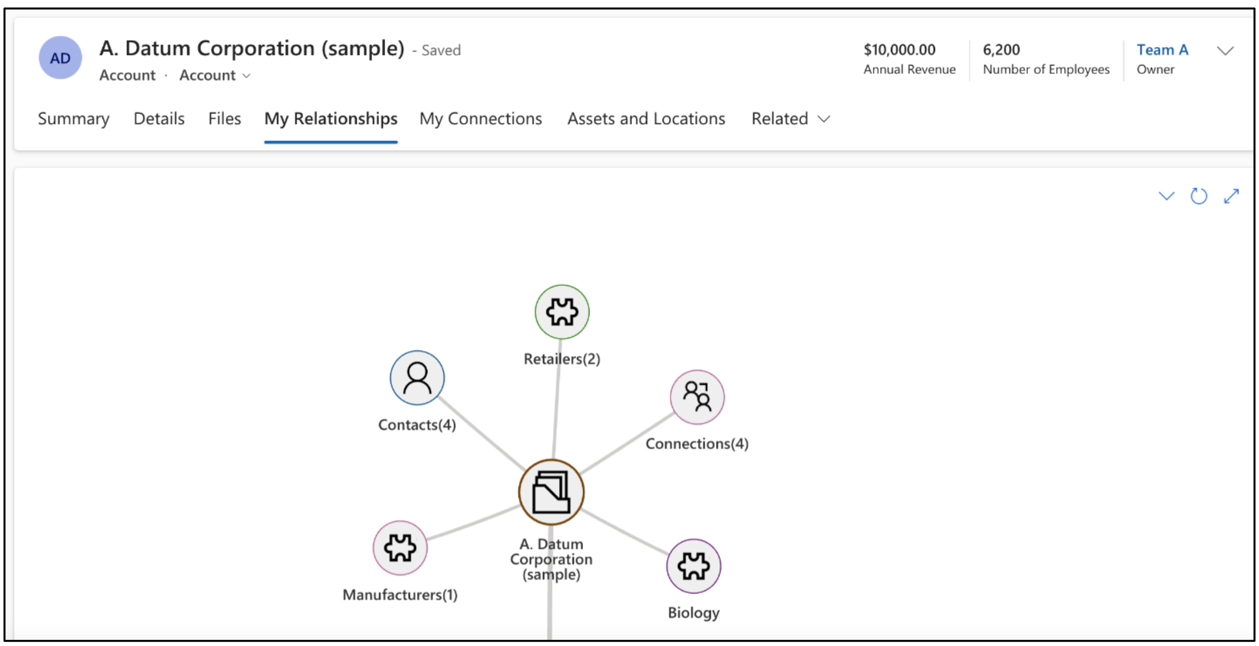
360 Degree view

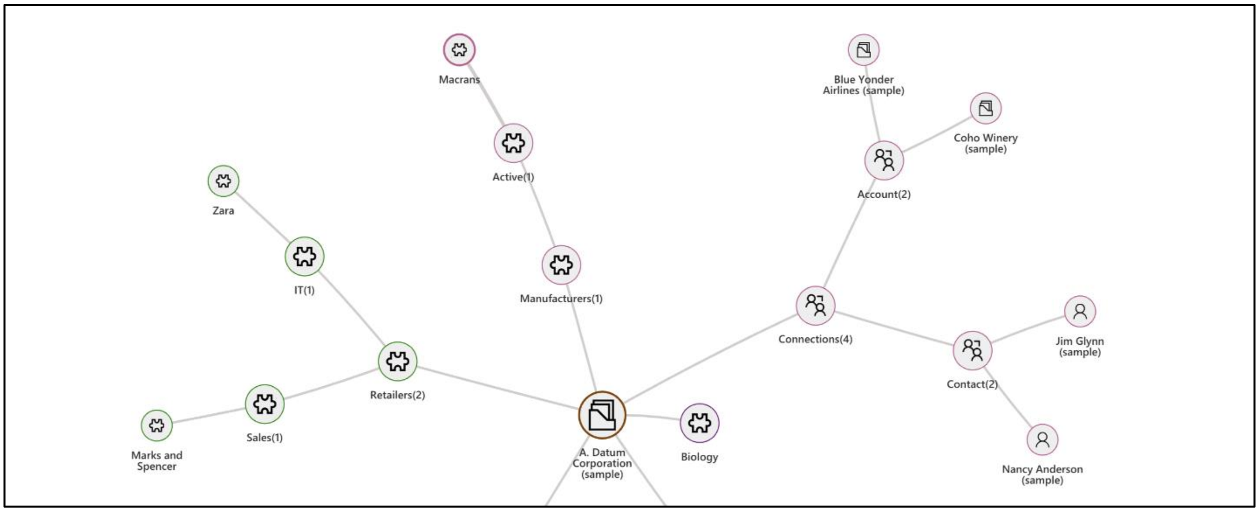
Map My Relationships provides you with 360 degree view of all important data of the record. Getting this summary of data in a single view further helps to interpret and analyze information quickly.



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.



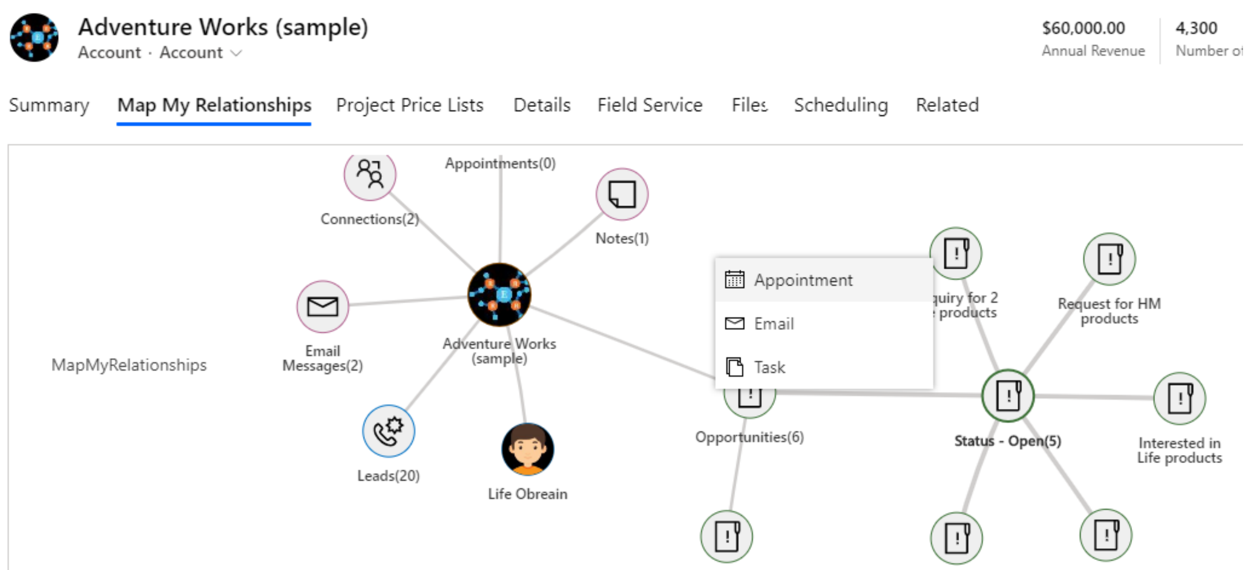


Display Images

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.

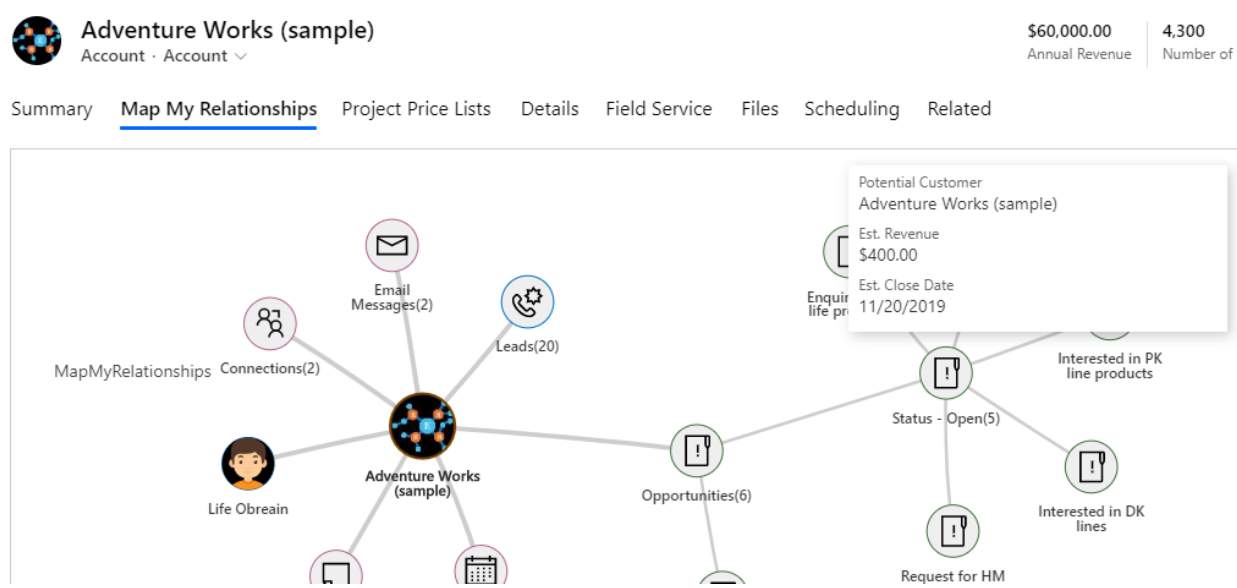
Perform Quick Actions

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.



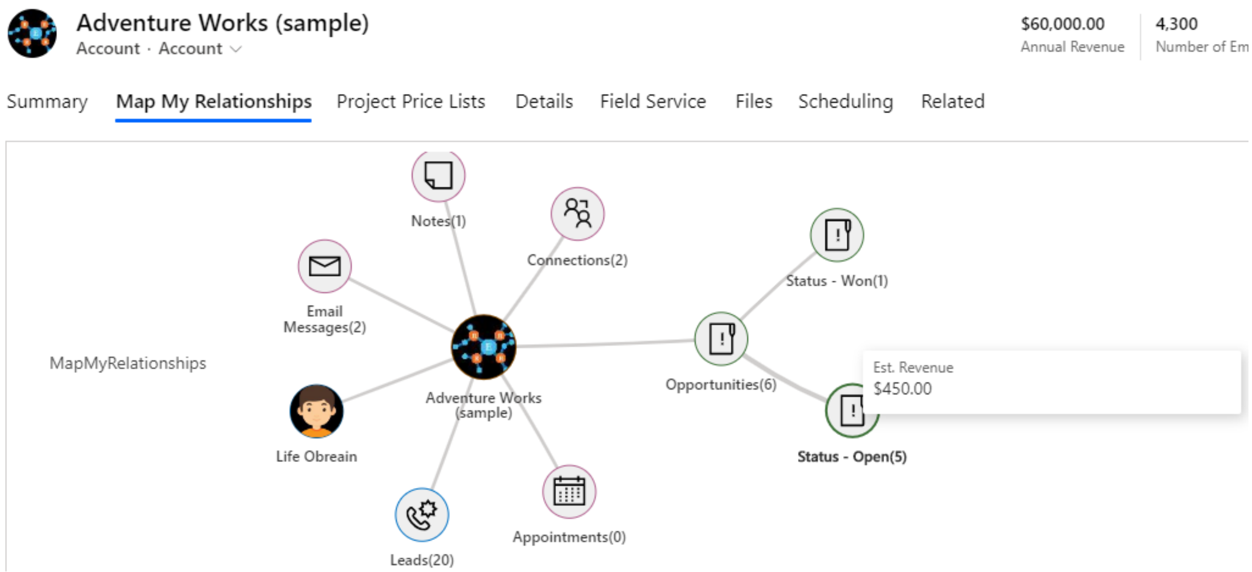
View Record Details

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



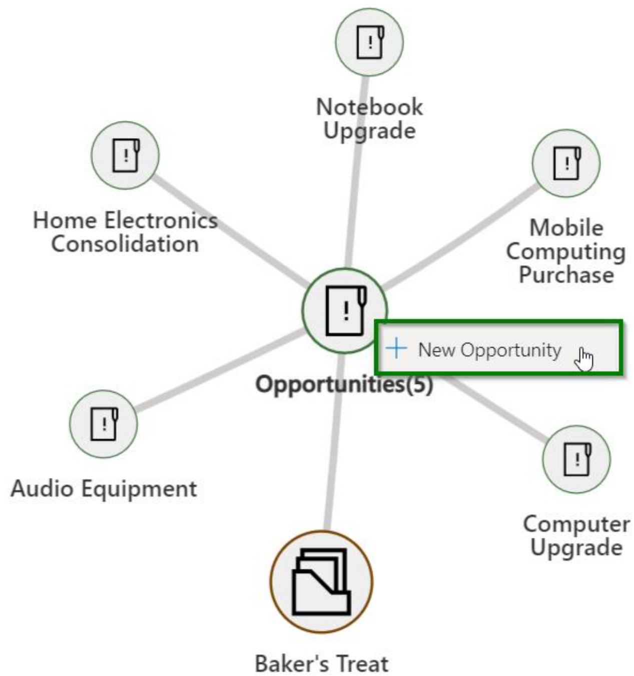
Grouping & Aggregation

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

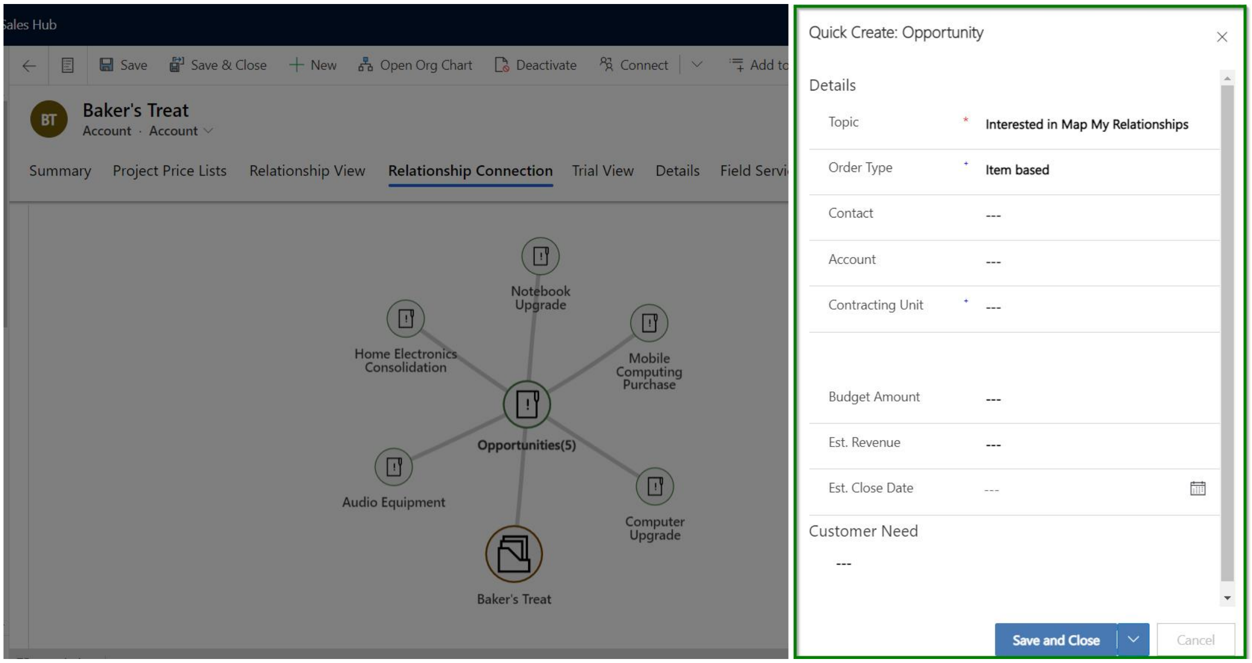

Adventure Works (sample)
Account · Account
$60,000.00
Annual Revenue
4,300
Number of Em
Summary
Map My Relationships
Project Price Lists
Details
Field Service
Files
Scheduling
Related
MapMyRelationships
Notes(1)
Connections(2)
Email Messages(2)
Status - Won(1)
Adventure Works (sample)
Opportunities(6)
Est. Revenue
$450.00
Life Obreain
Status - Open(5)
Appointments(0)
Leads(20)

Create Associate Records

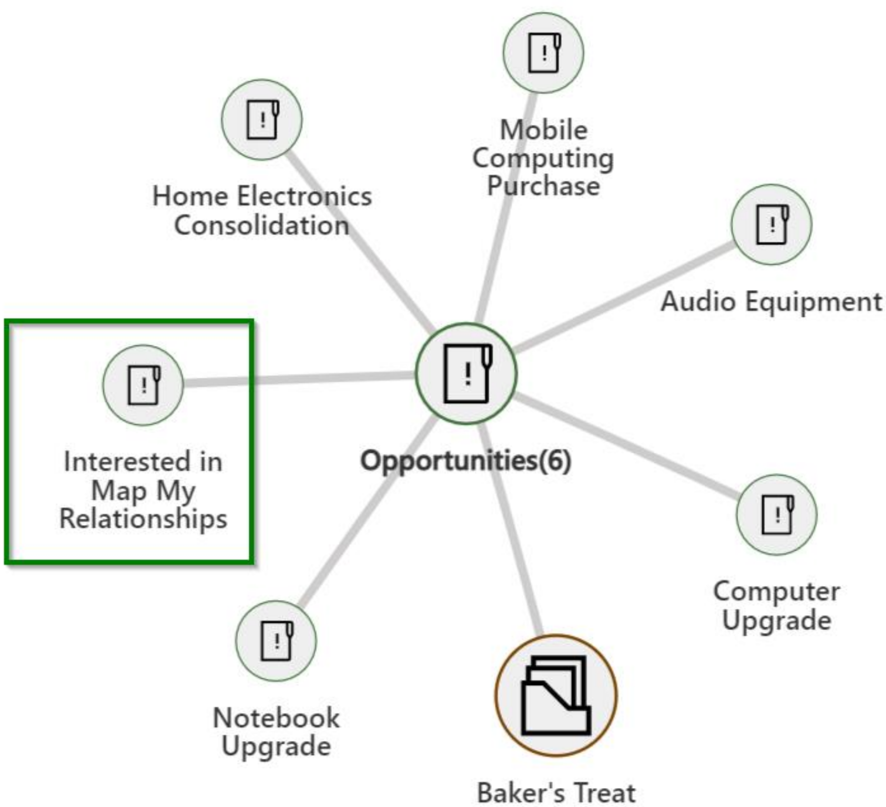
Map My Relationships gives user a provision to quickly create a new entity record which will be associated to its main record through the relationship view.



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

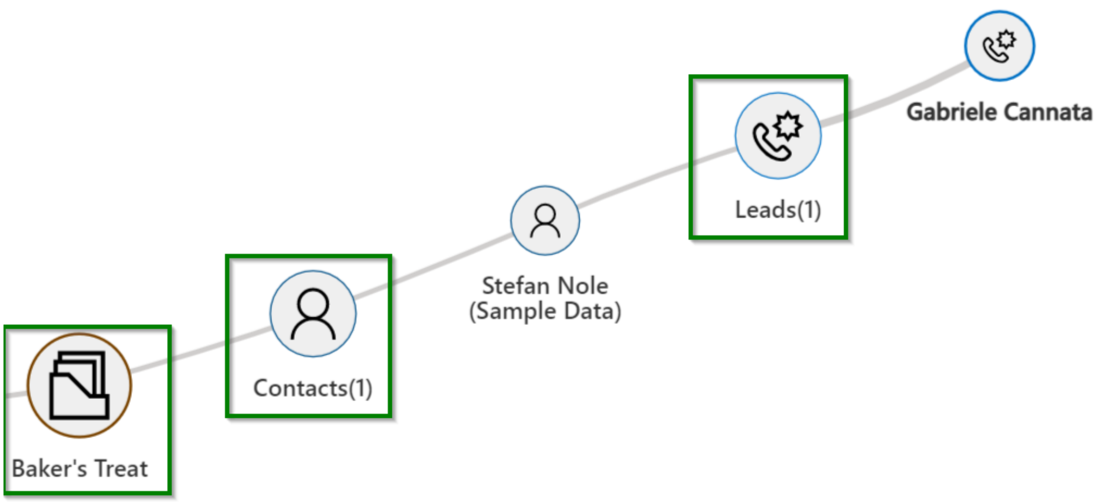


After the record is created, the newly added record will start showing in the relationship view.

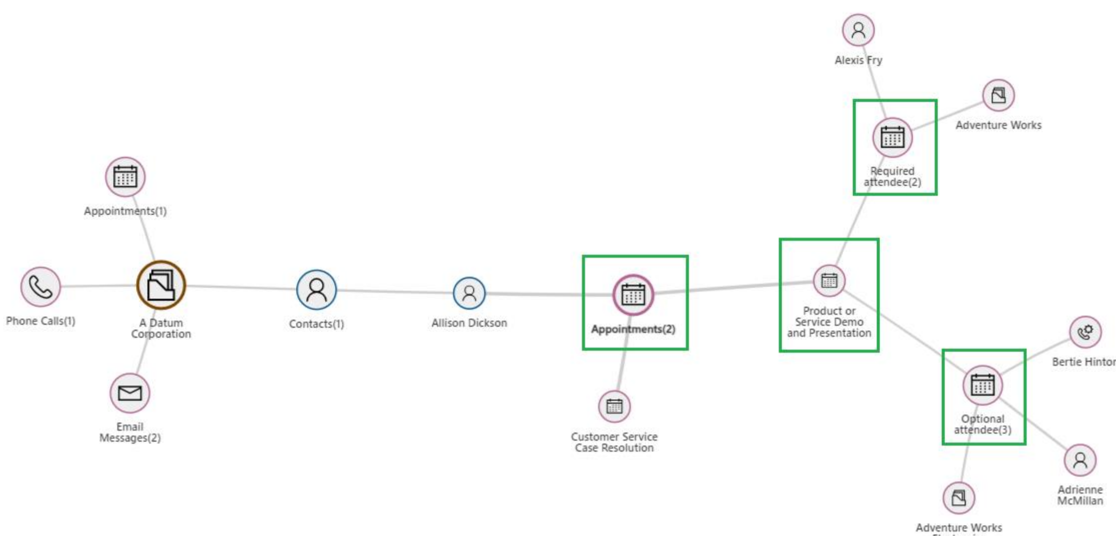


N-level relationships

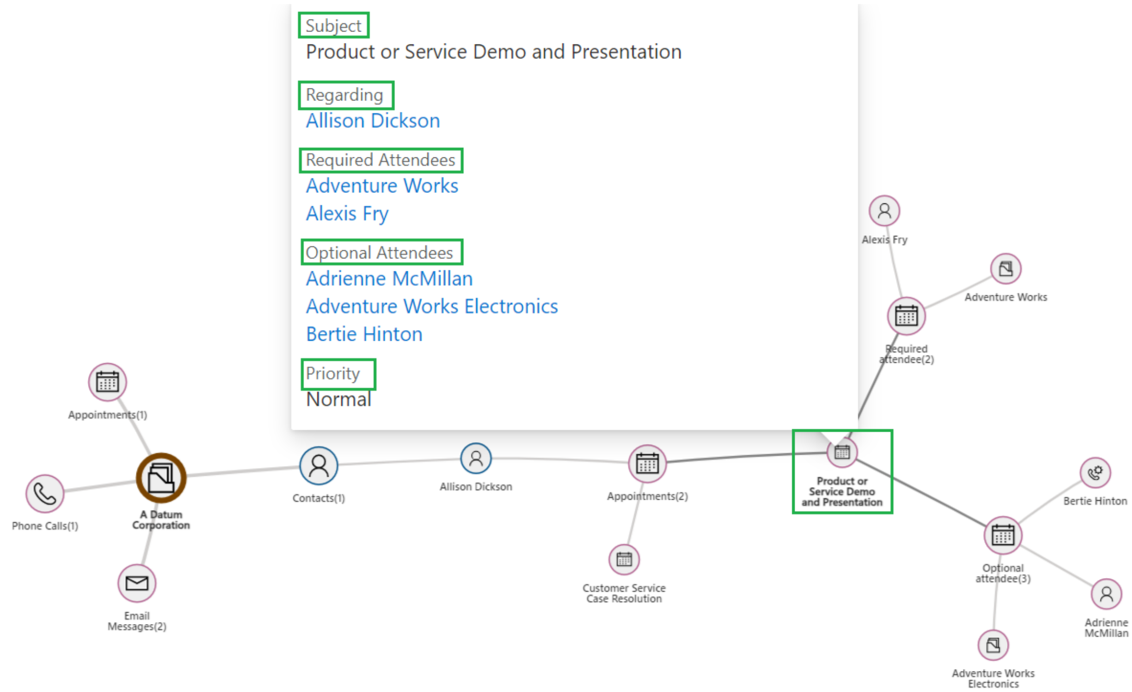
Map My Relationships enables users to drill down further through N-level relationships of a particular entity to see associated entity records.



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



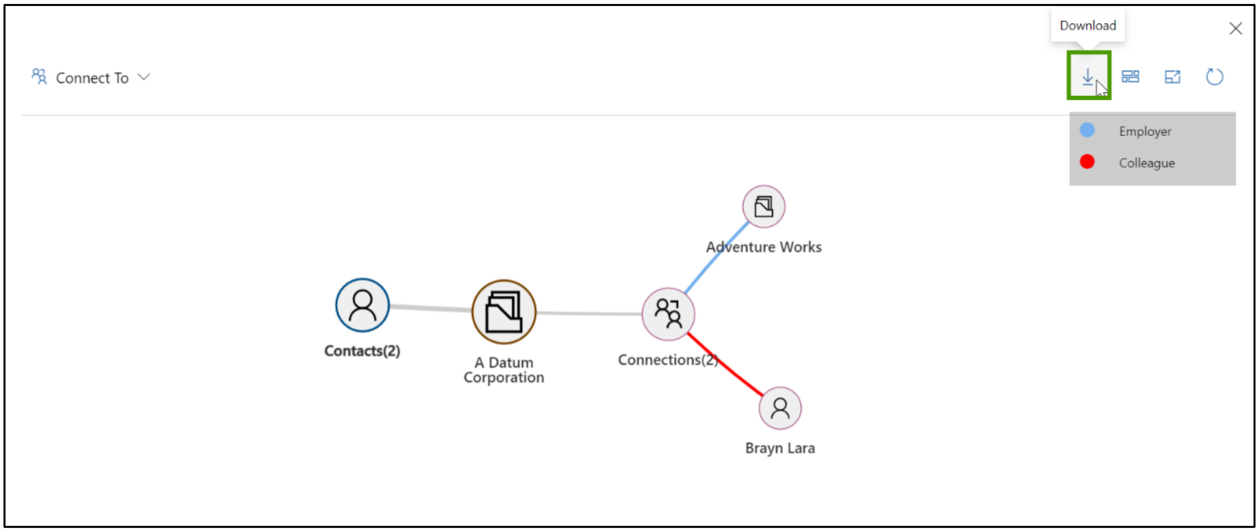
Users can also view details of the **Appointment** by simply hovering over **Appointment Activity Node** within **Mind Map View**.



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".

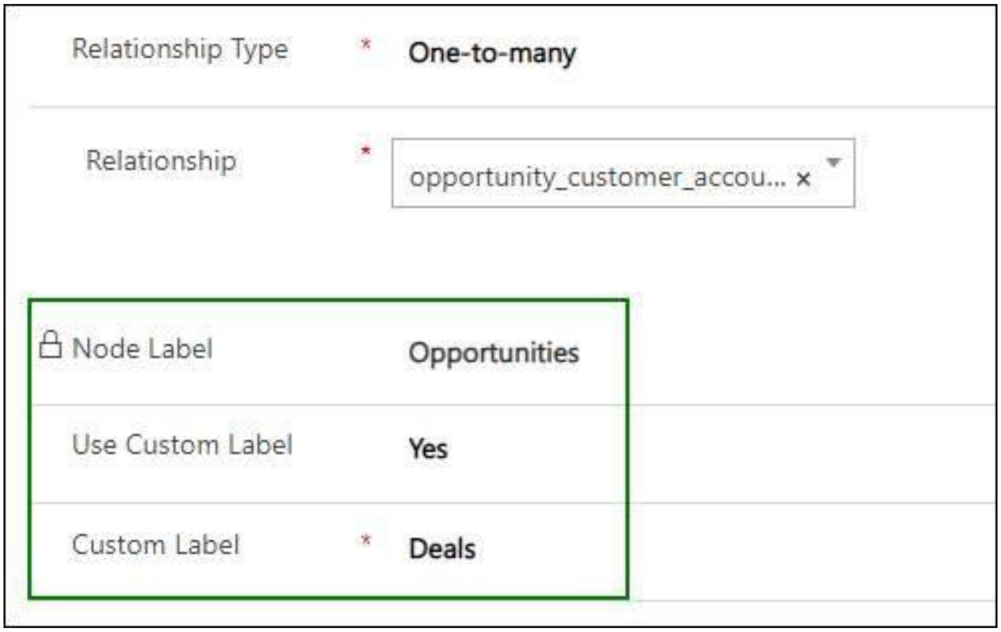
Custom Label

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.

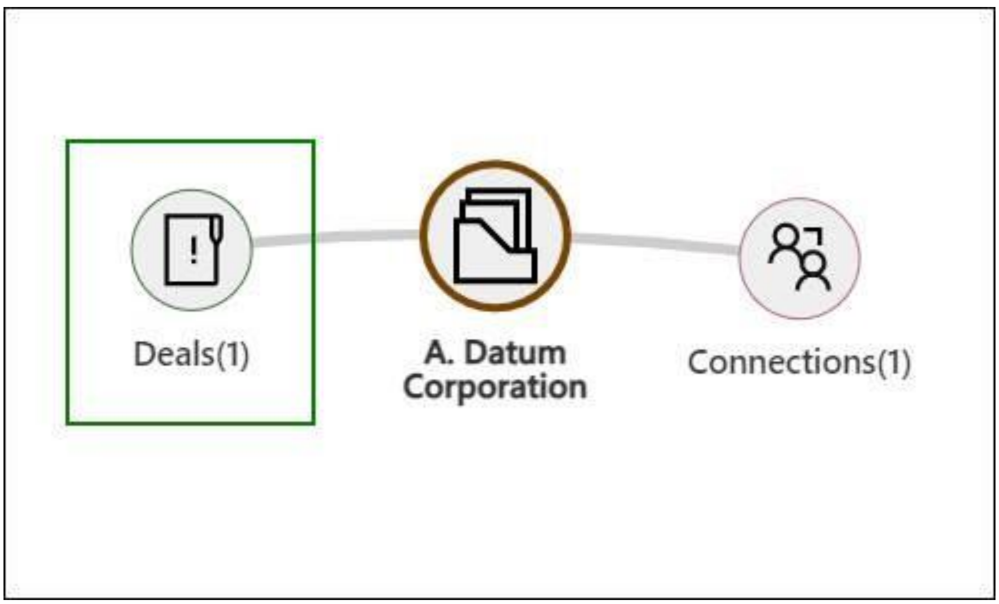
Relationship Level

'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.



Configuration



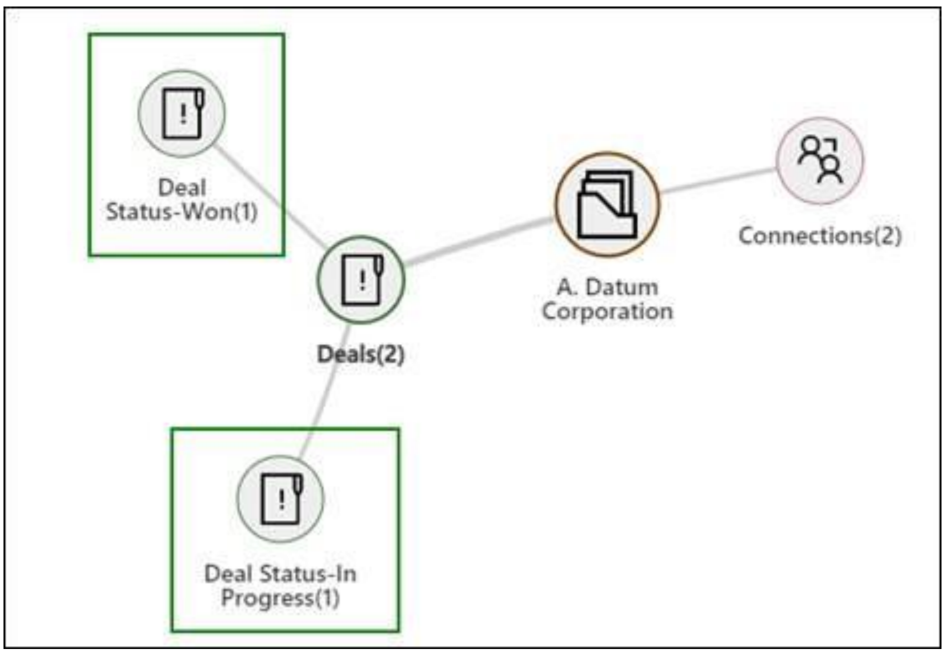
Outcome

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

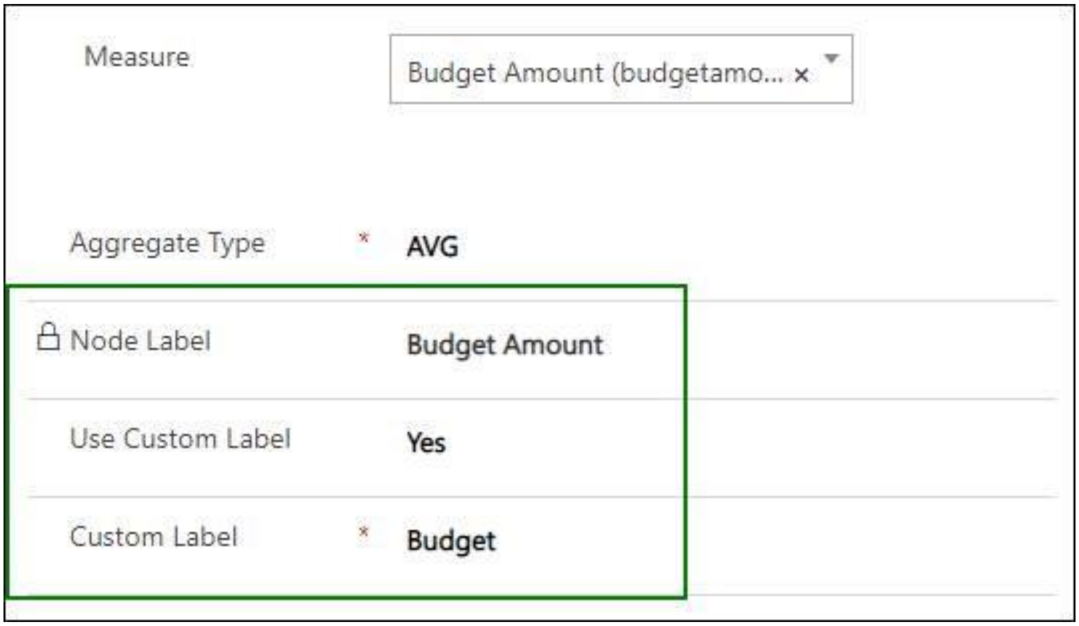


Outcome

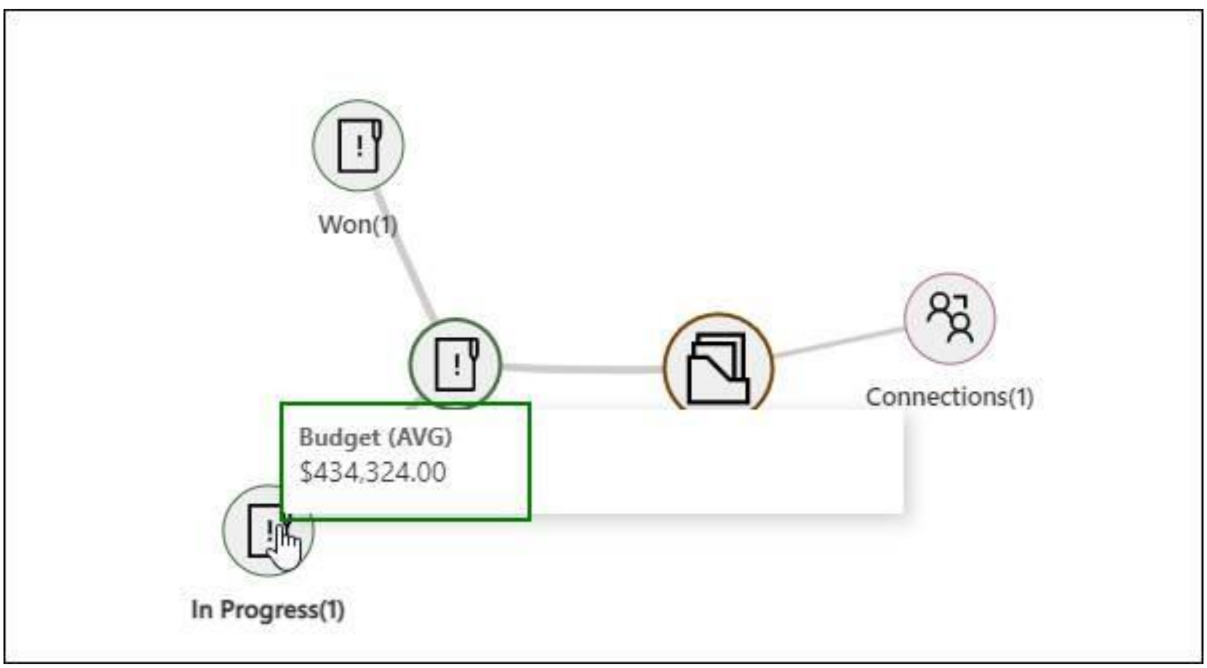
Note: Adding {value} in Custom Label is mandatory, otherwise the option name will not appear on the group node.

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.



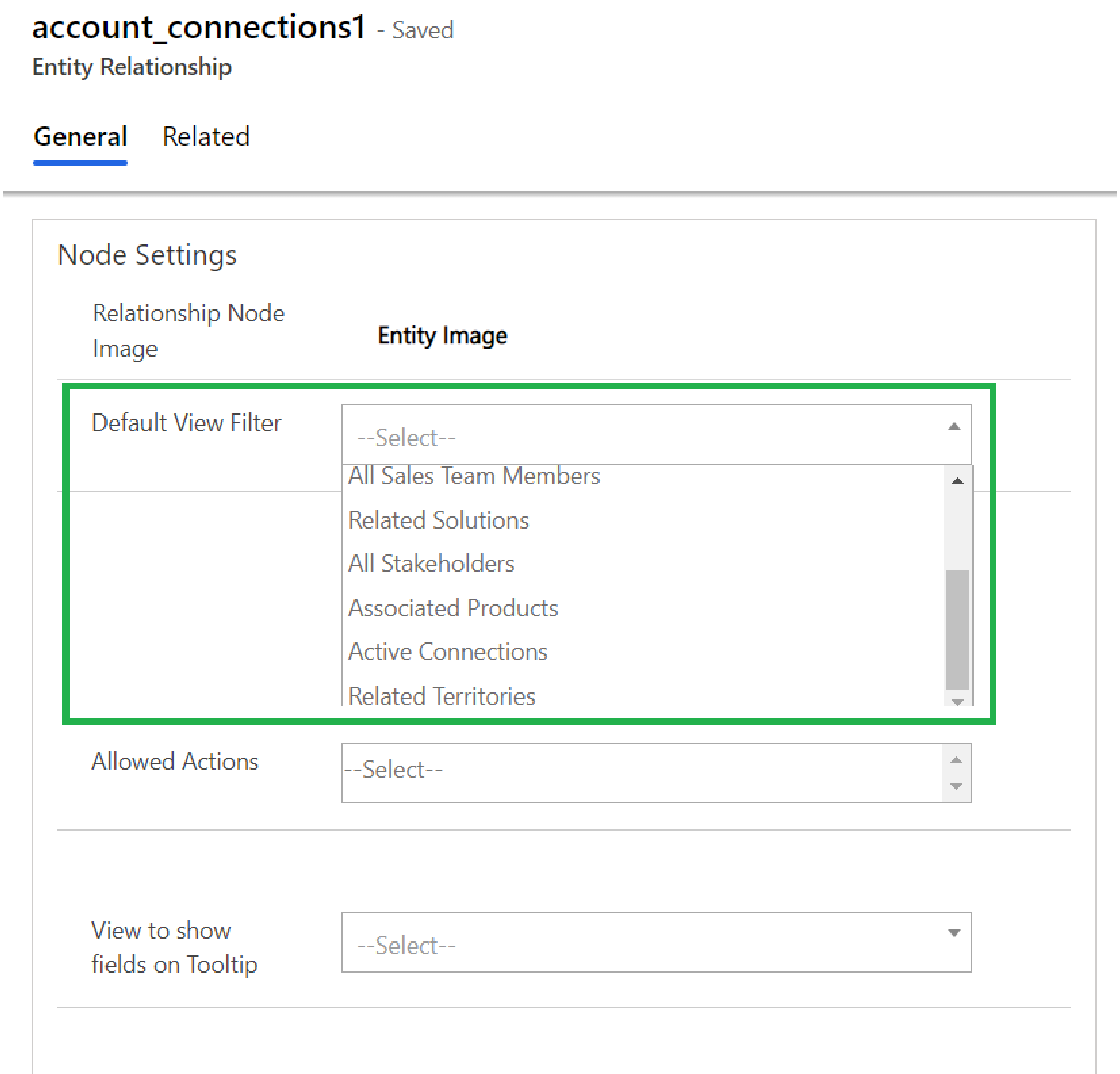
Configuration



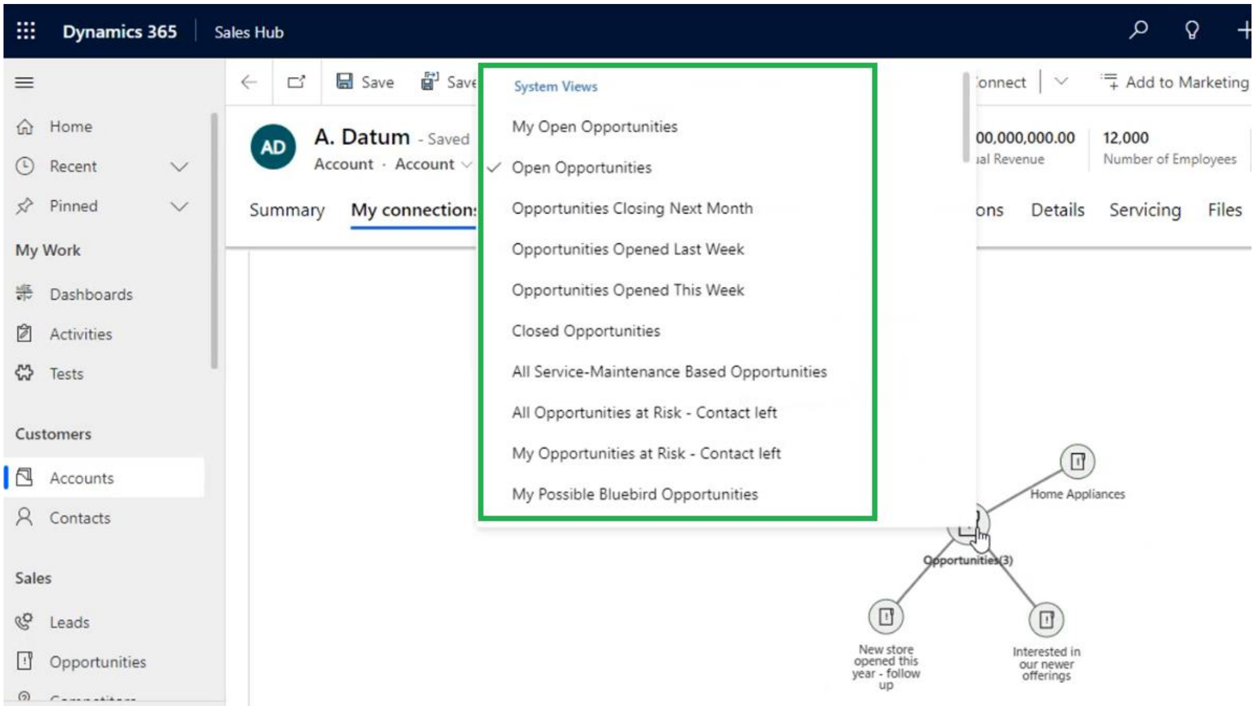
Outcome

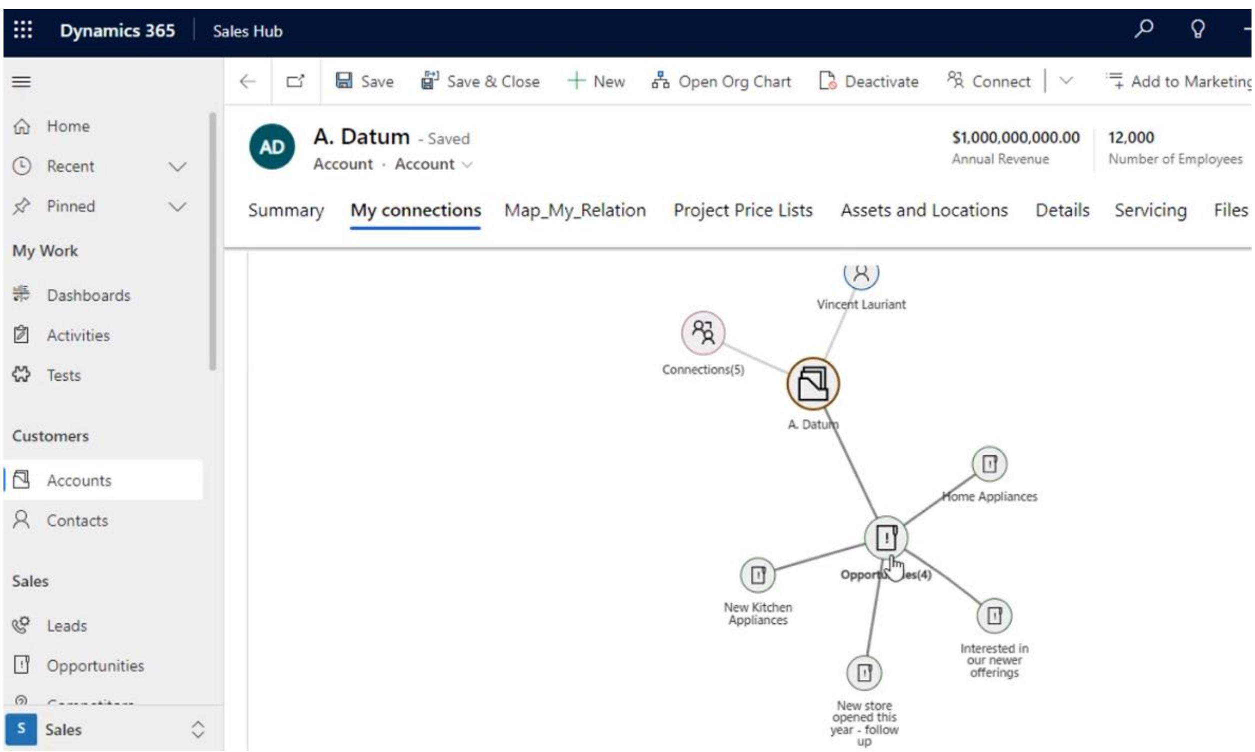
Filter Records

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:



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



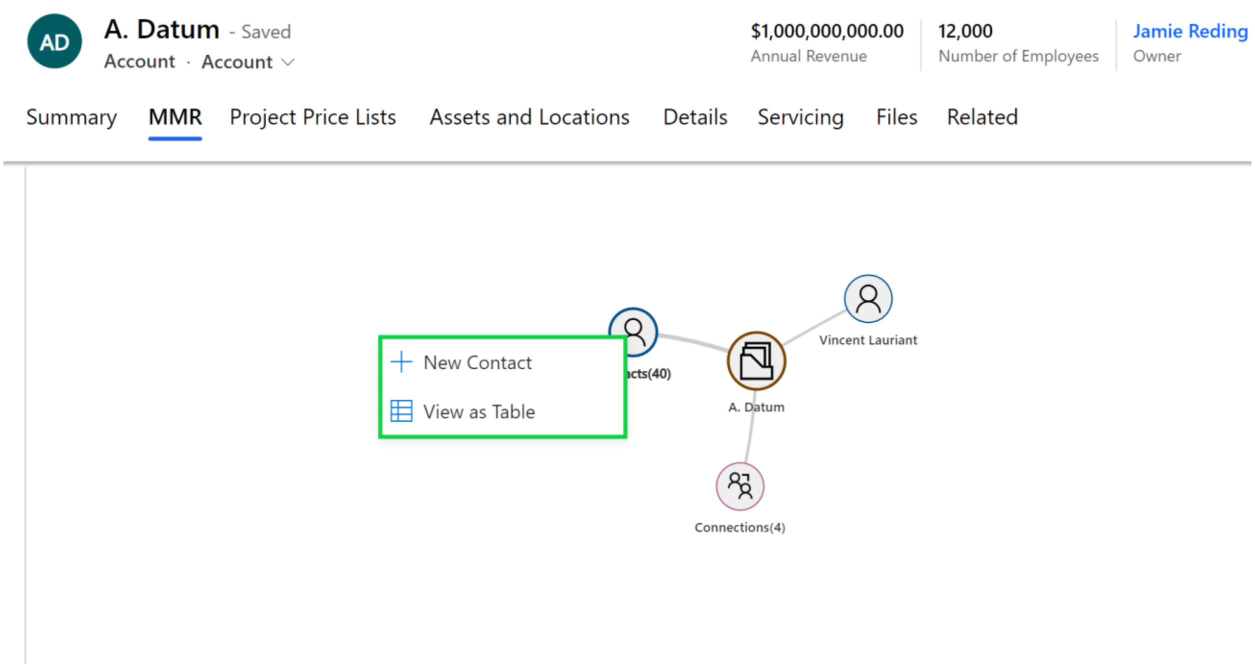


Note: This field is available only for One-to-Many and Many-to-Many relationships.

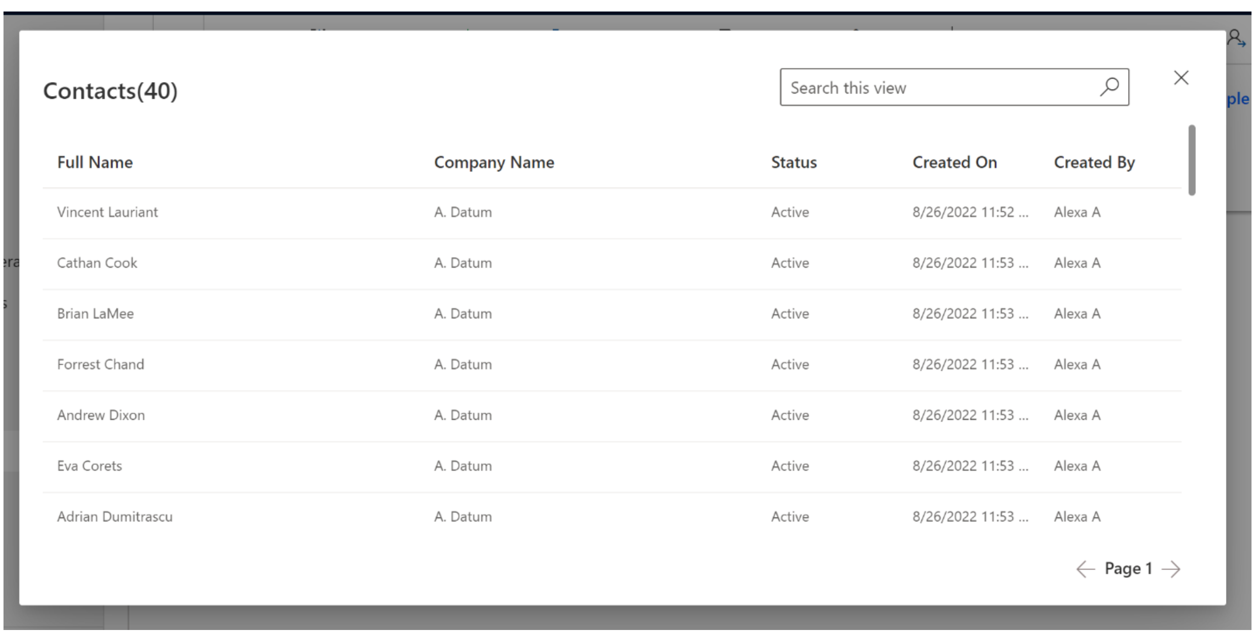
Read-Only Grid

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.



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.

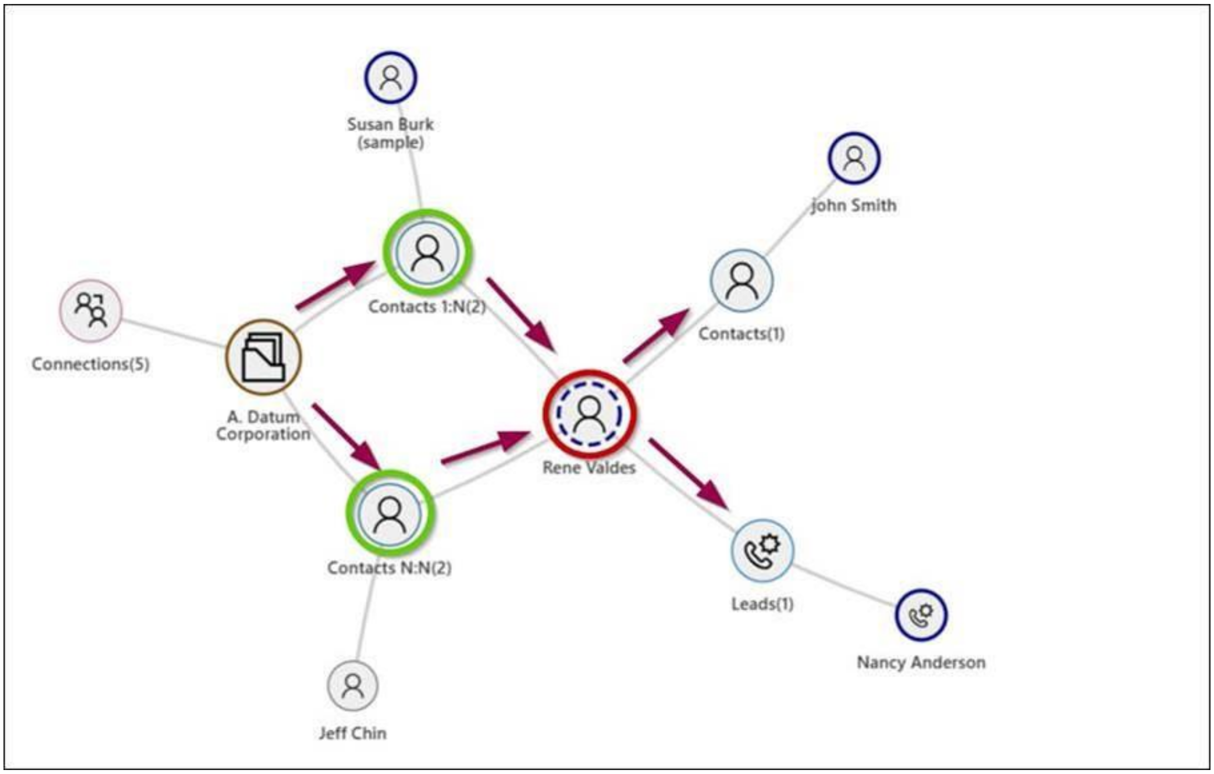
Tooltip, Drill-Down, and Quick Actions:

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.



- **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.

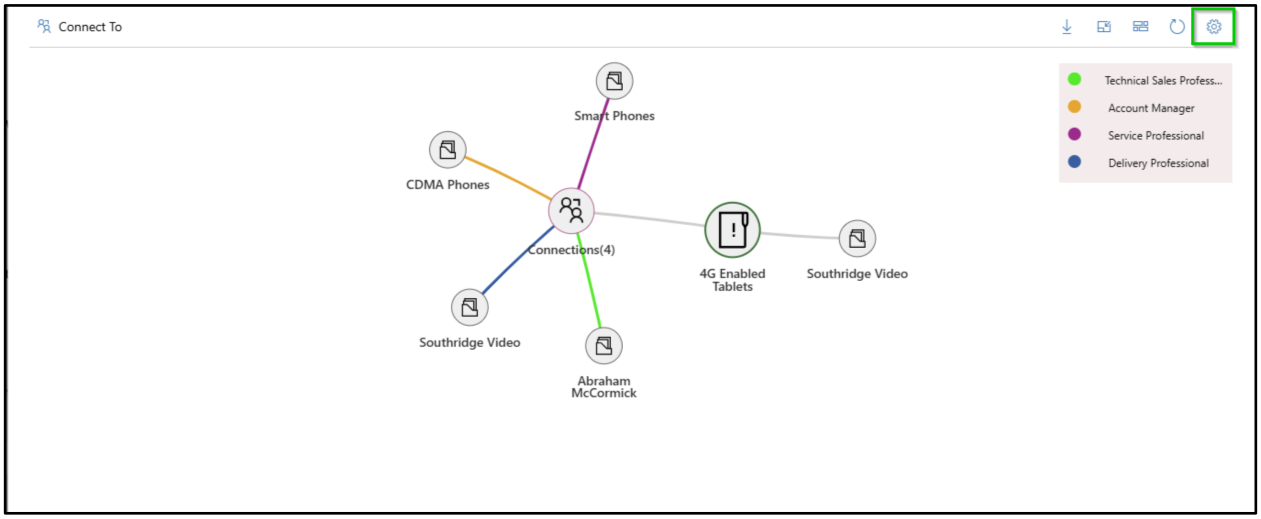
4. **Collapsing Child Nodes:**
   To collapse the child nodes, users can double-click the root parent entity node (e.g., "A. Datum Corporation") or the group node, if present, to restore the layout to its central node view.

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.

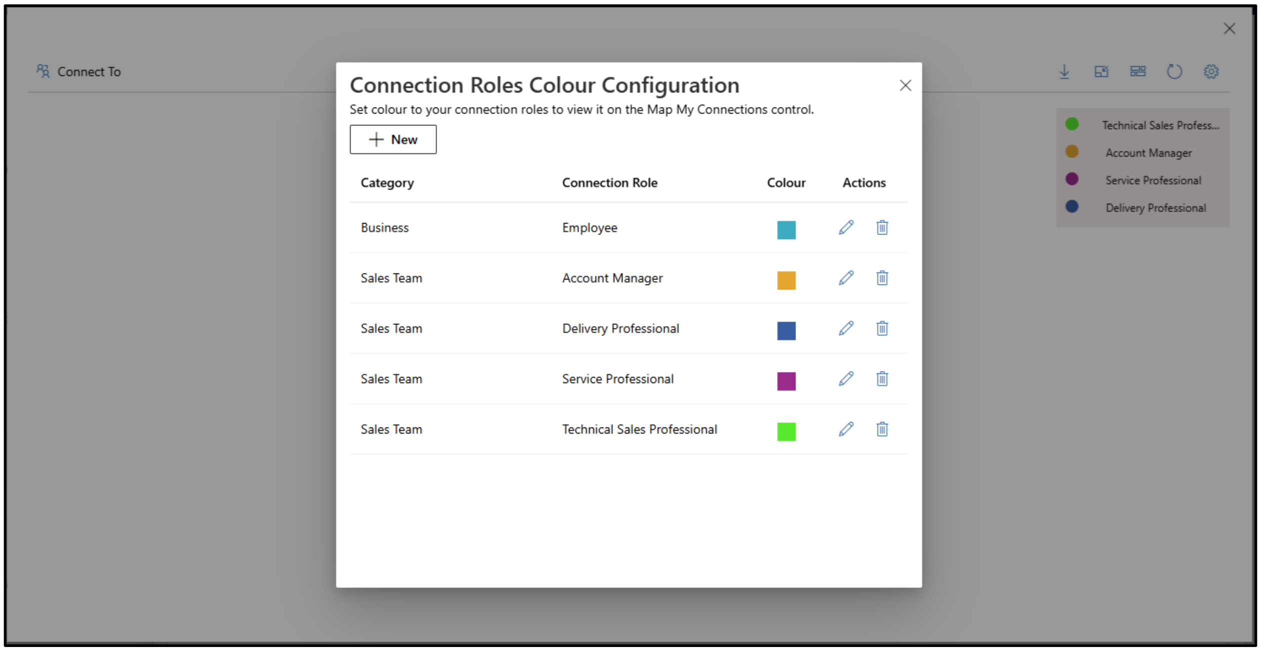
Here are the steps to configure connection role colors:

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

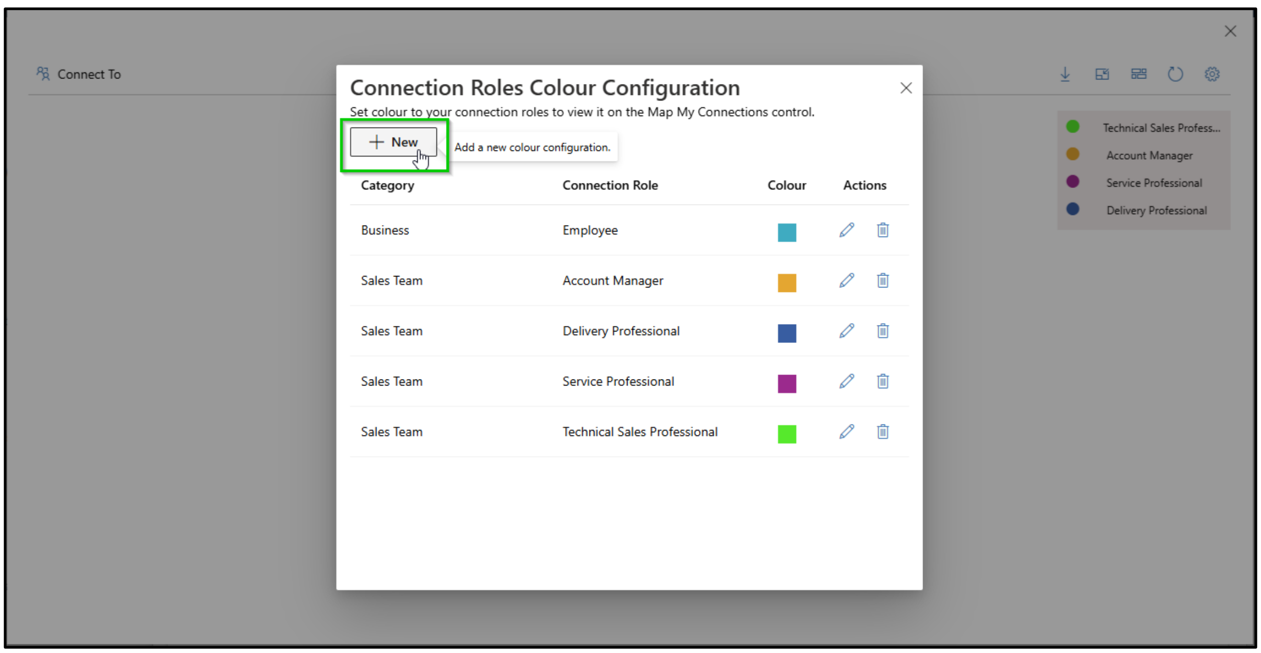


Note: The Settings Icon is visible only to users with the **System Administrator** or **MapMyRelationship Administrator** role. Only users with these roles can configure connection role colors.

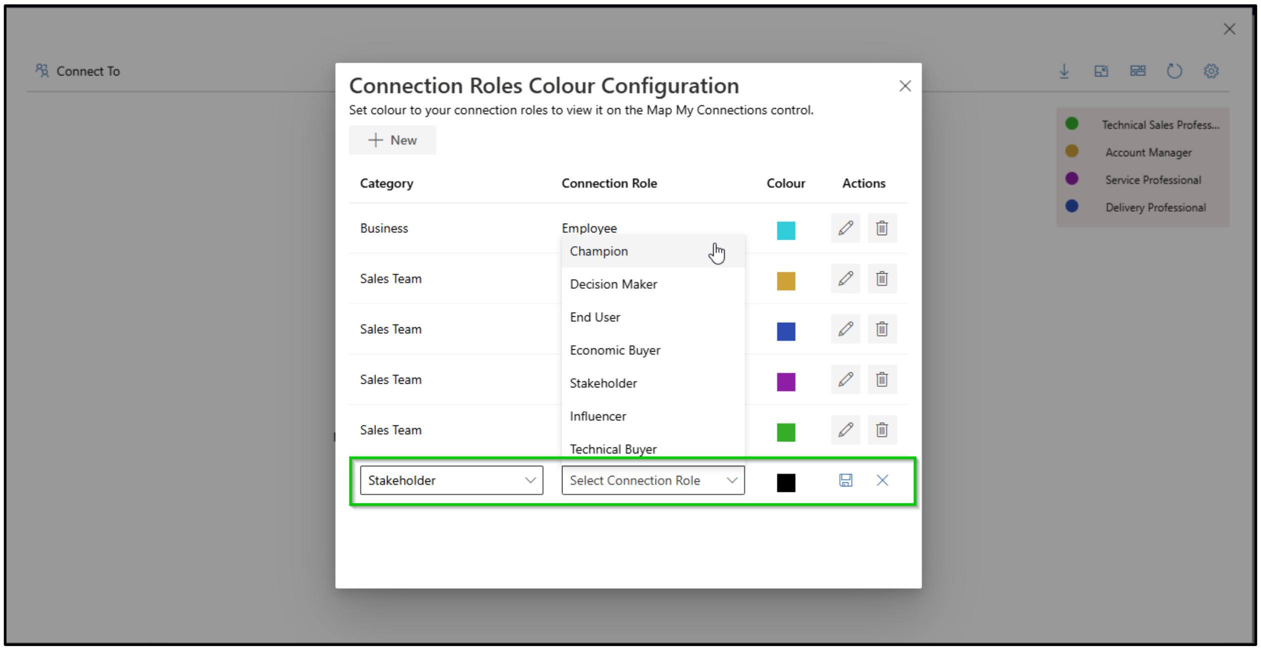
2. After clicking the Settings icon, the configuration interface will appear.



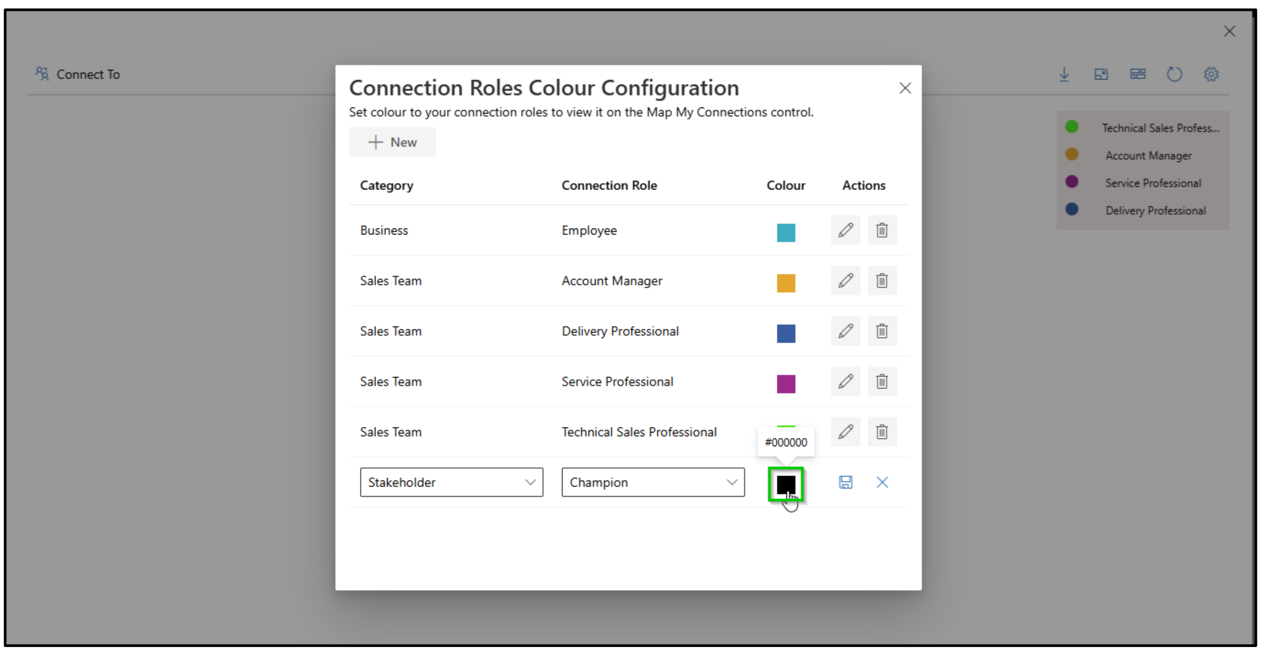
3. To create a new connection role color configuration, click on the **New** button.



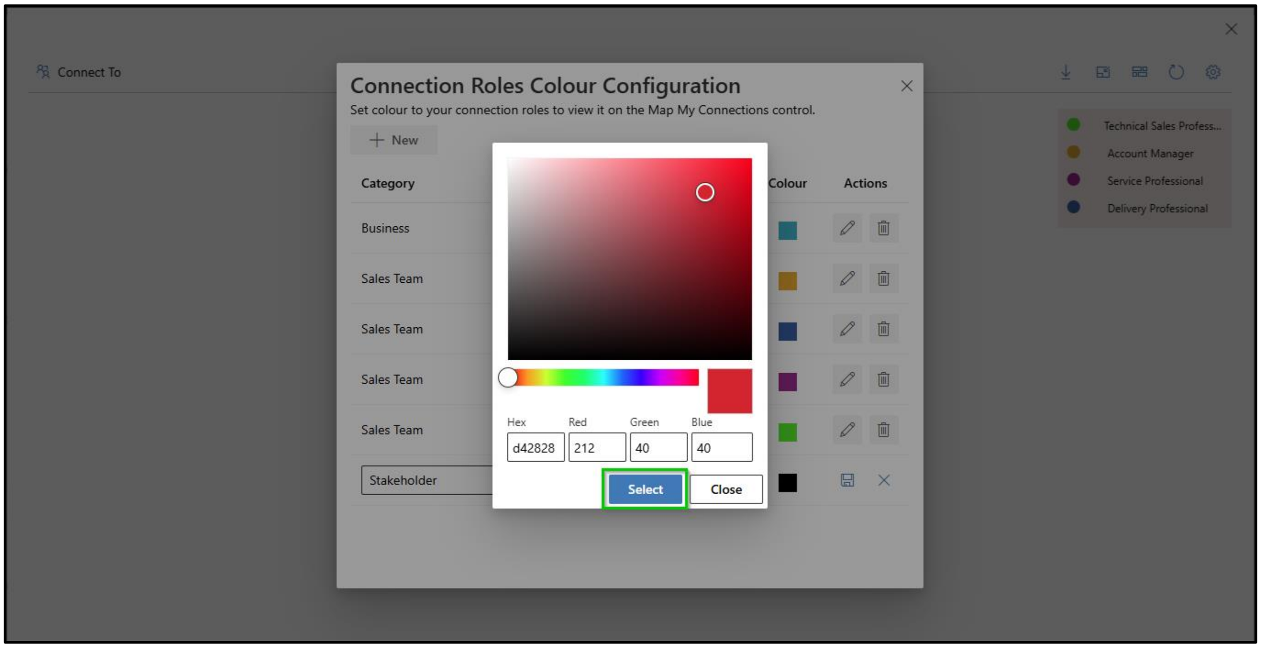
4. Clicking the **New** button will add a new row to the configuration list. In the new row, select the desired **Connection Role Category** from the dropdown menu. Based on the selected category, choose the appropriate **Connection Role** from the dropdown, which will display only the roles available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



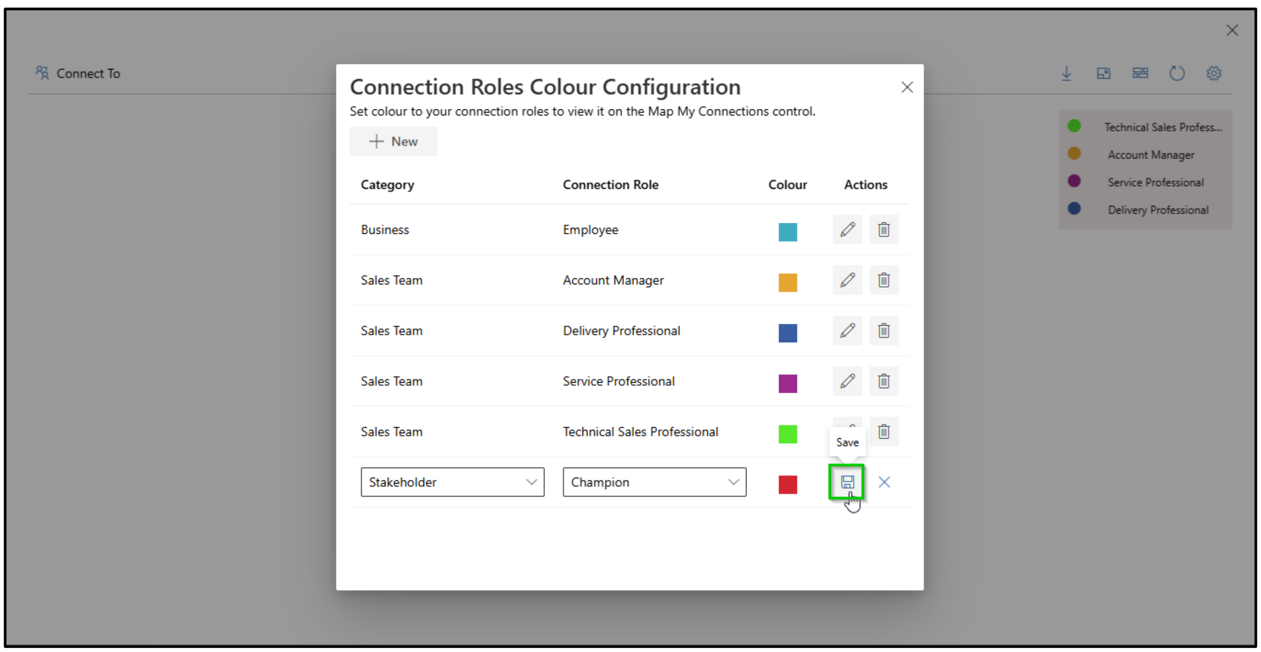
5. Click on the **Color Box** to open the color picker.



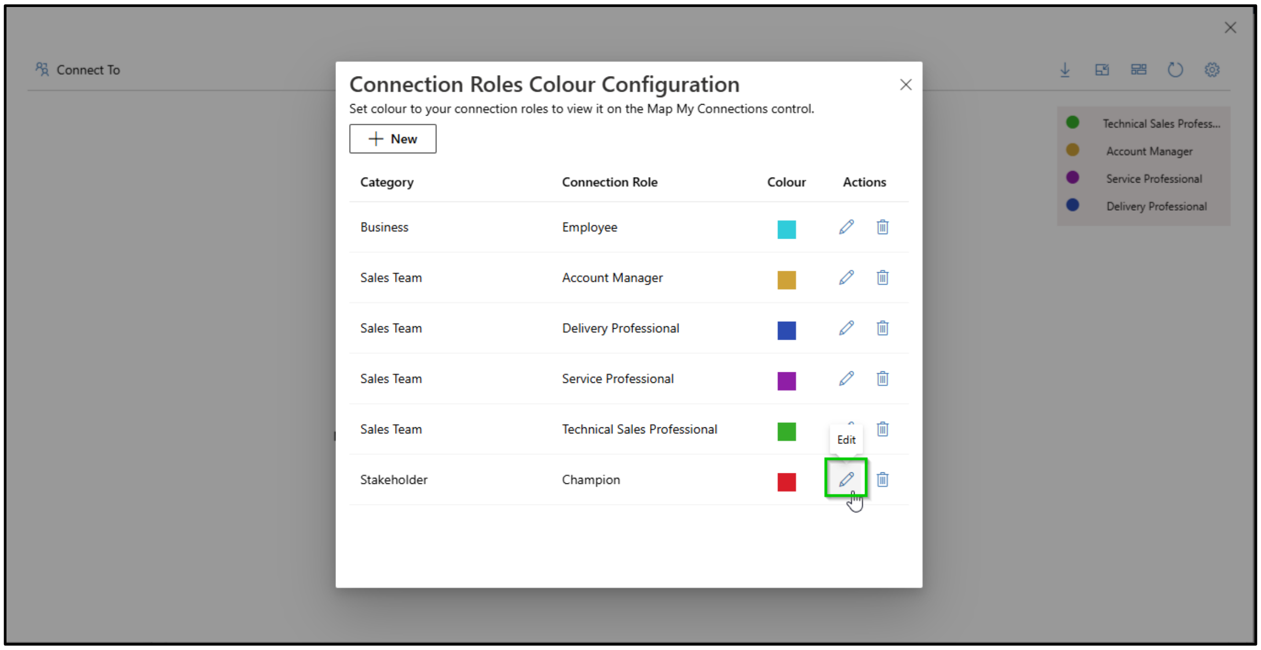
6. Once the color picker appears, select your desired color and click **Select**. **Note:** You cannot choose a color that has already been assigned in another configuration.

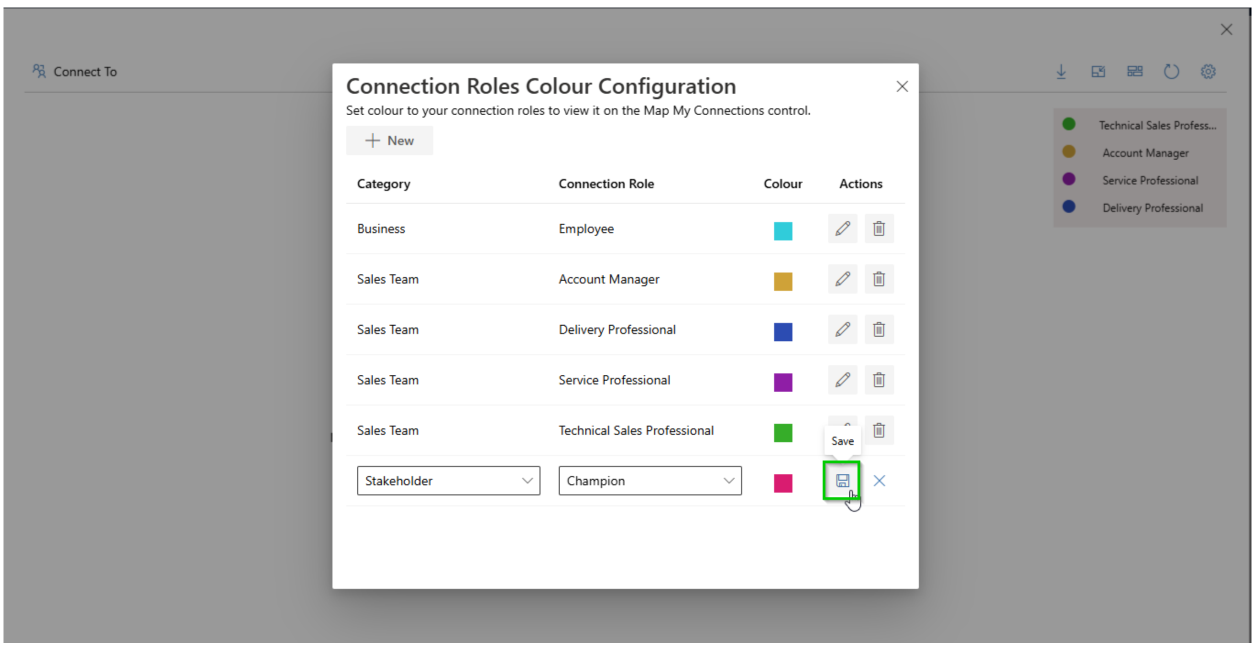


7. After configuring the connection role and its color, click the **Save** button to apply the changes.

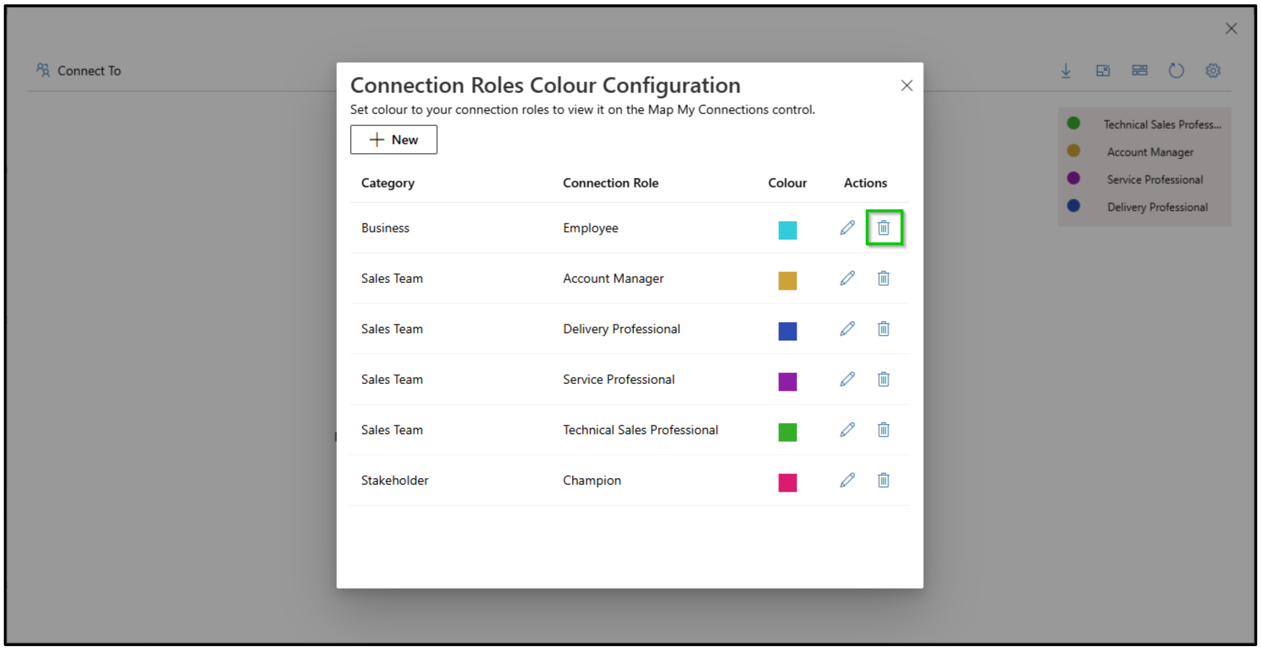


8. To edit an existing configuration, click on the **Edit** button, make the necessary changes, and click **Save**.





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



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

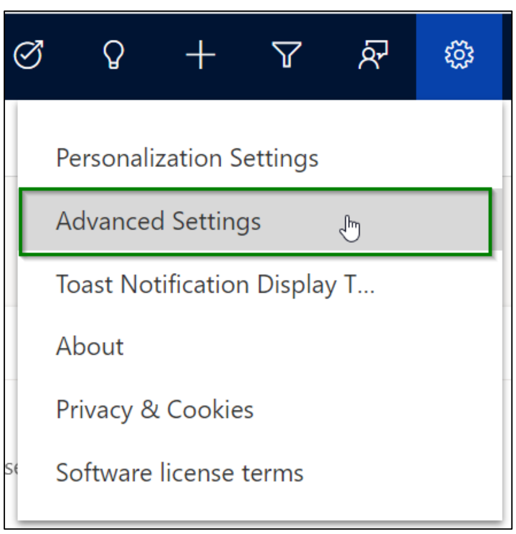
1. **Grid/Relationships View:** To allow user to see the data in grid as well as in relationship view.
2. **Expand relationship view:** To view the connection control in enlarged screen mode.
3. **Grid Refresh:** To refresh the connection control
4. **New connection creation:** These are the necessary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

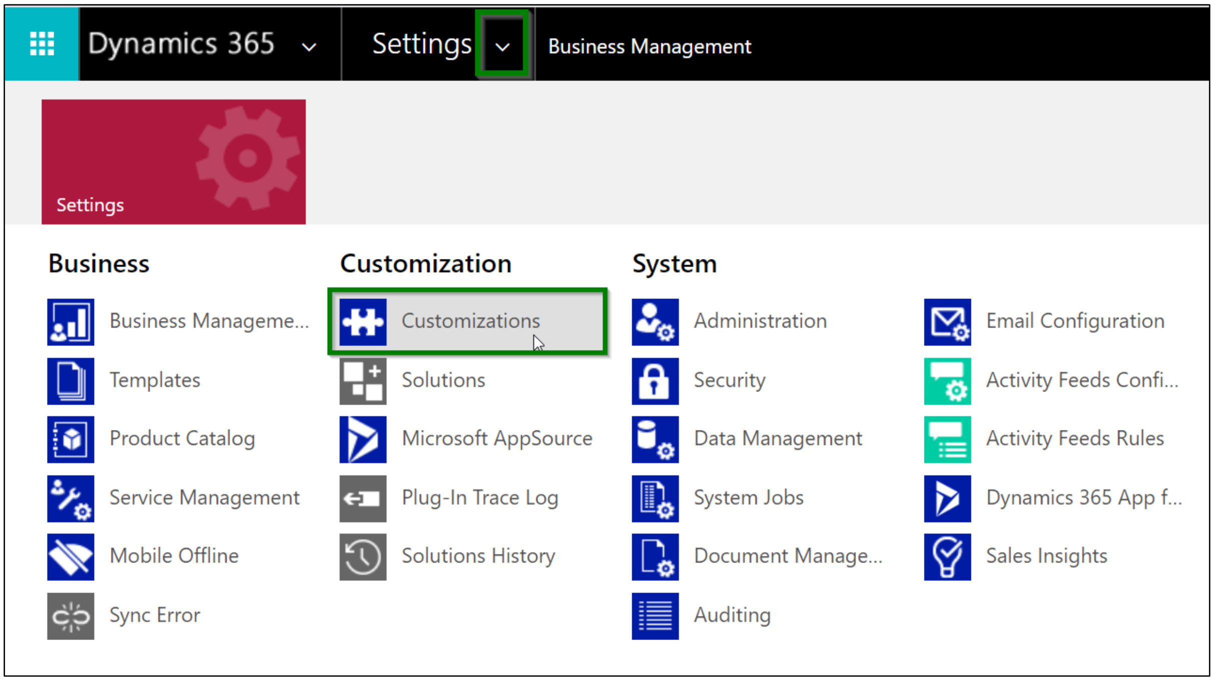
Steps to configure the connection control

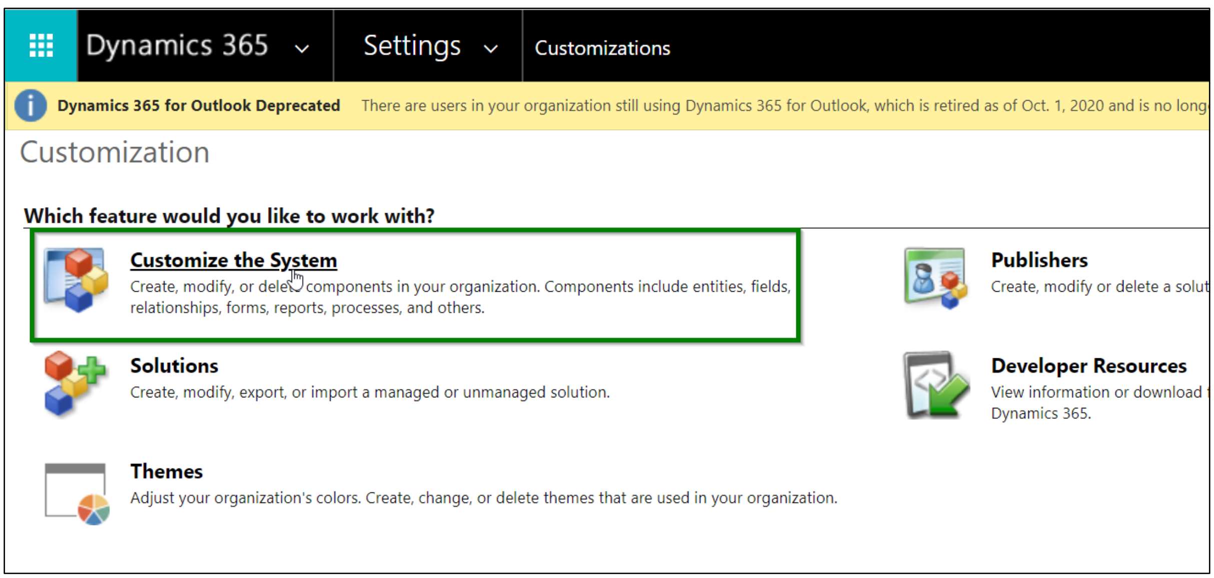
Consider a scenario where user wants to connect a few records to the Opportunity entity record.

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

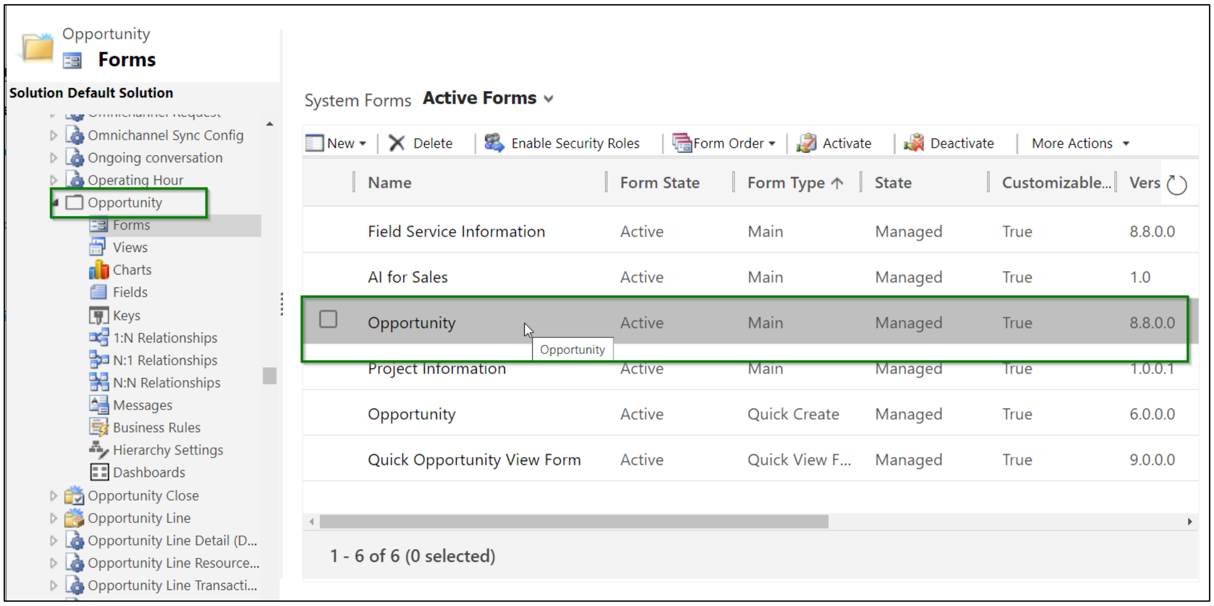
1) Go to **Advanced Settings → Settings → Customizations → Customize the System.**



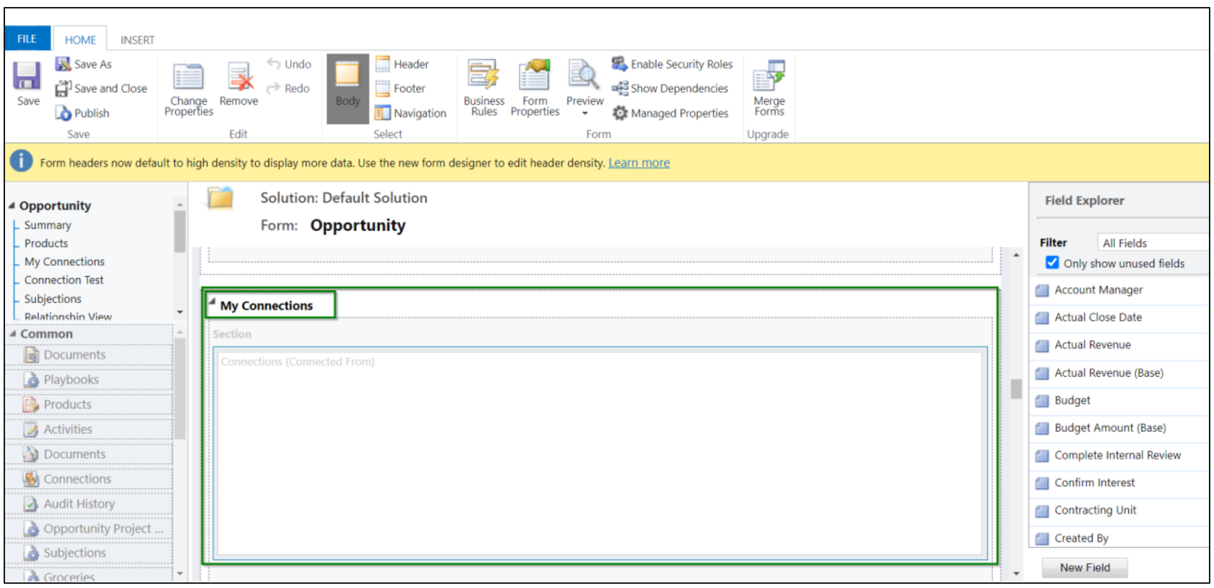




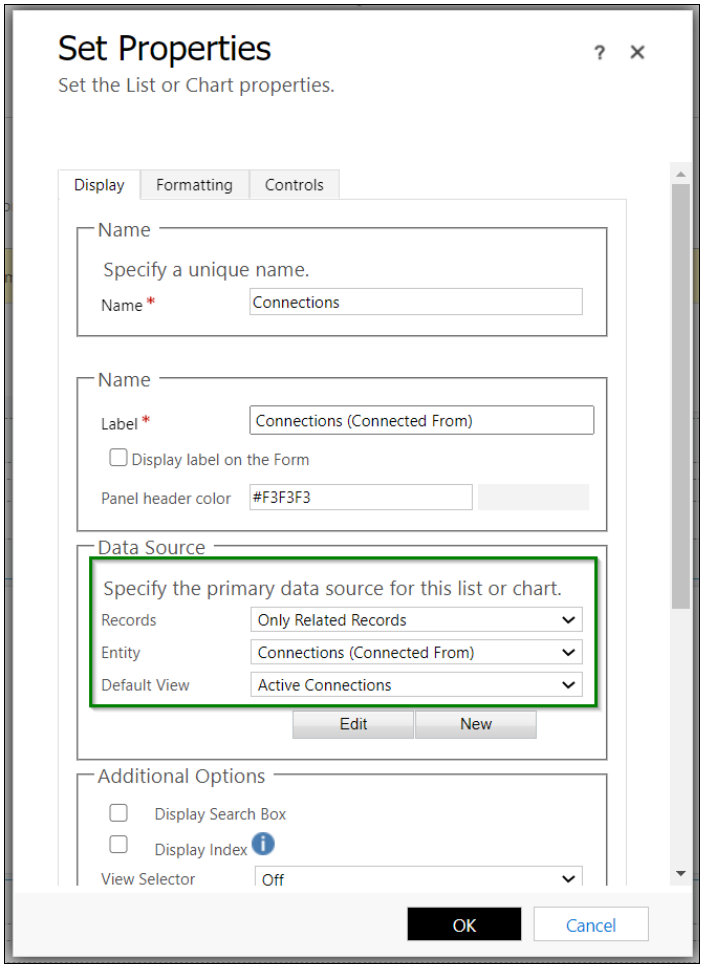
2) Next, under **'Default Solution'** select **Opportunity → Forms → Main Form.**



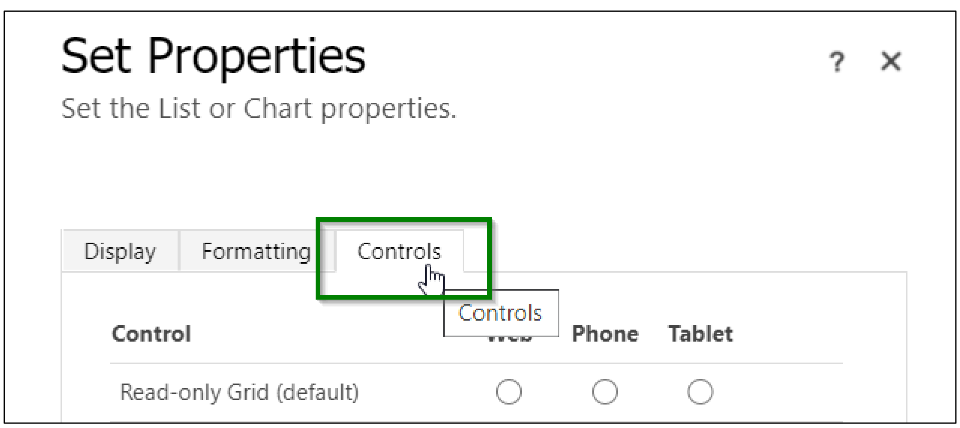
3) Now add a **sub-grid** on the form (You can add a sub-grid with one column for a better view).

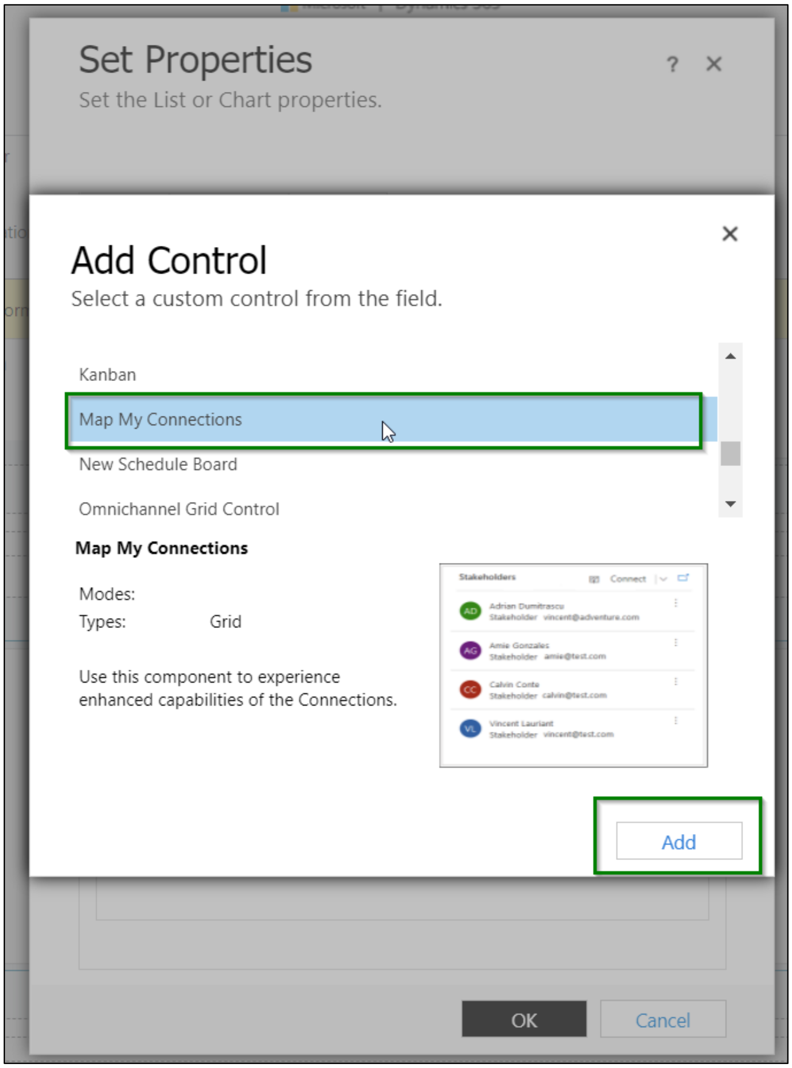


4) Set the properties of sub-grid as shown below:

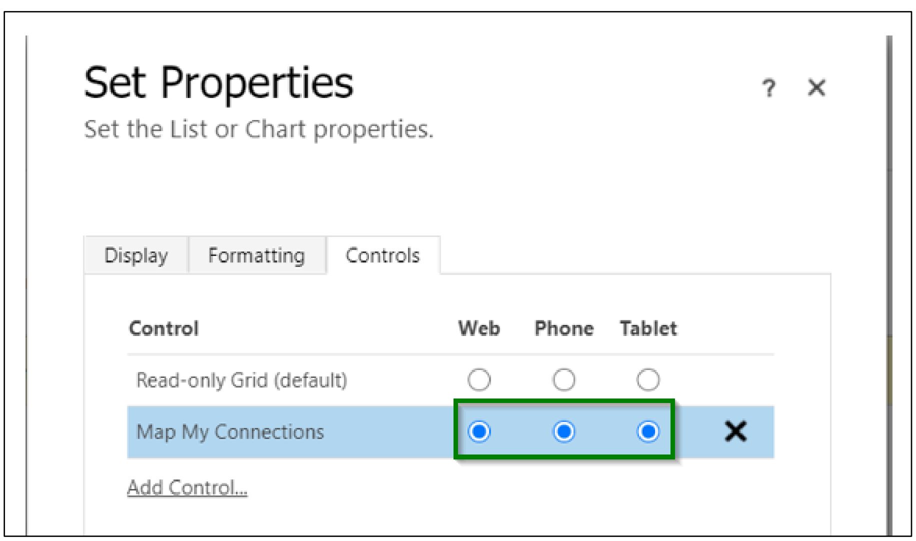


5) Now go to **'Controls'** and add **'Map My Connections'** control.





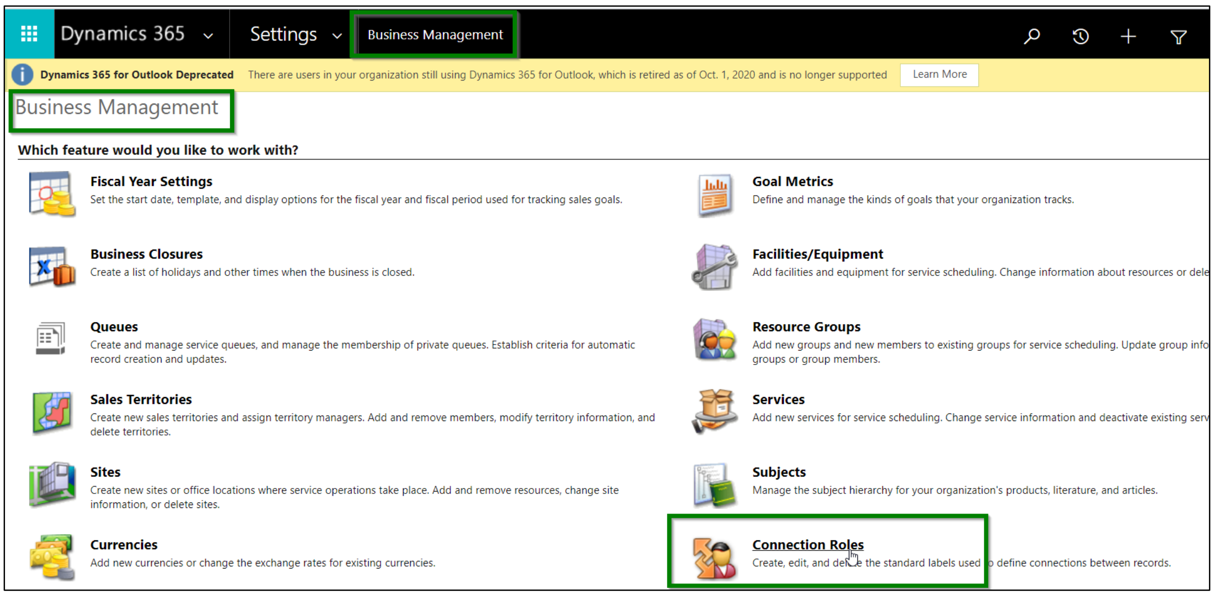
6) Enable the control so that you can see it on all three: **Web, Phone and Tablet.**



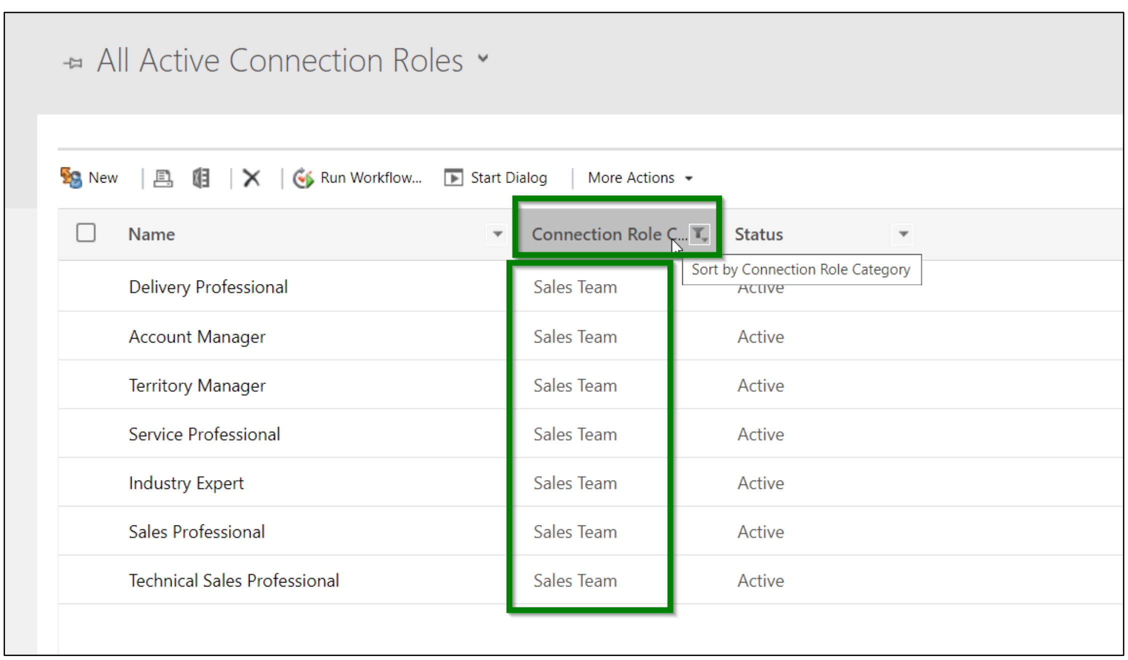
7) Next, let’s set the parameters for the control.

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

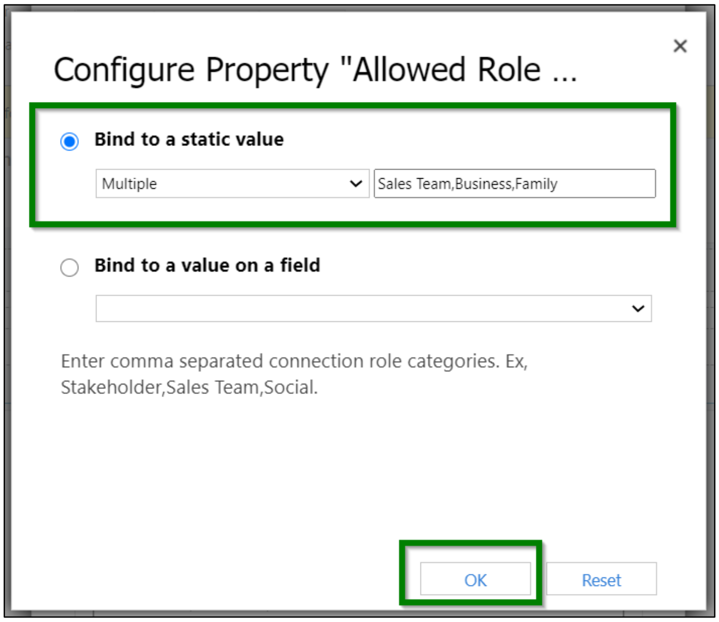
Note – These are the categories that you could find through the connection roles in business management.

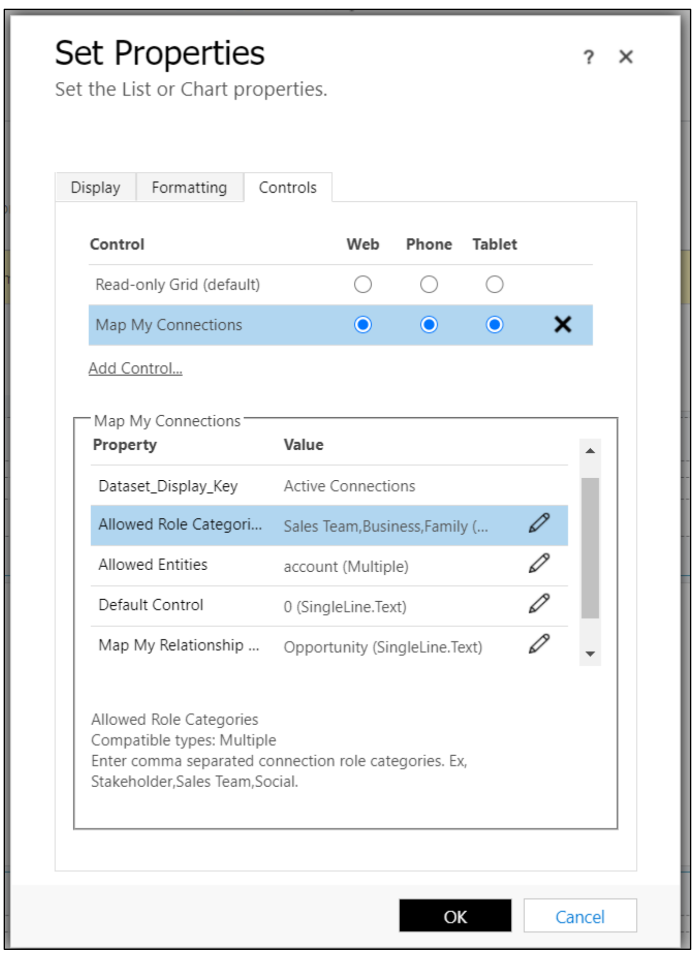


You can further sort it by category.



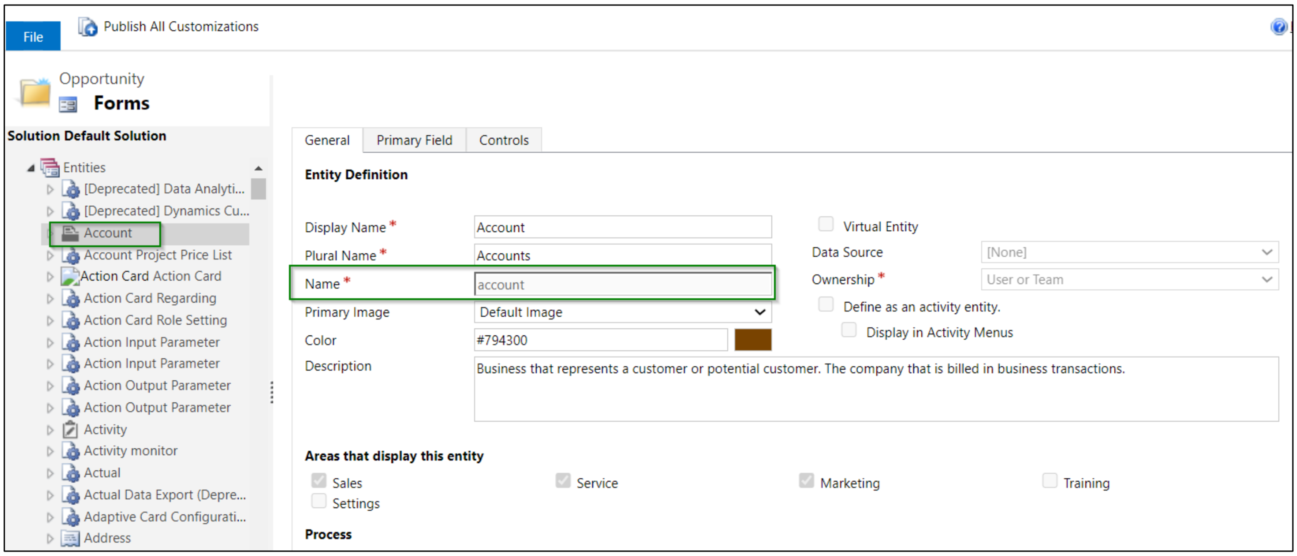
In this instance, we will put the categories as - **Sales Team,Business,Family** (**do not** add any space in between the commas **","** as the configuration is likely to crash because of that).



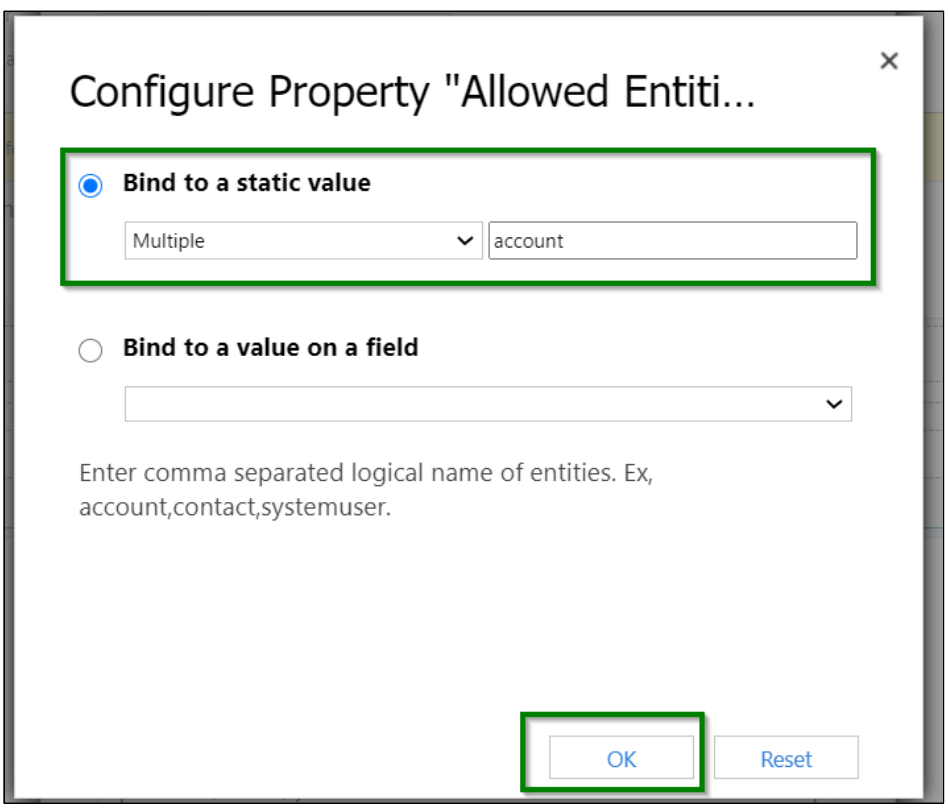


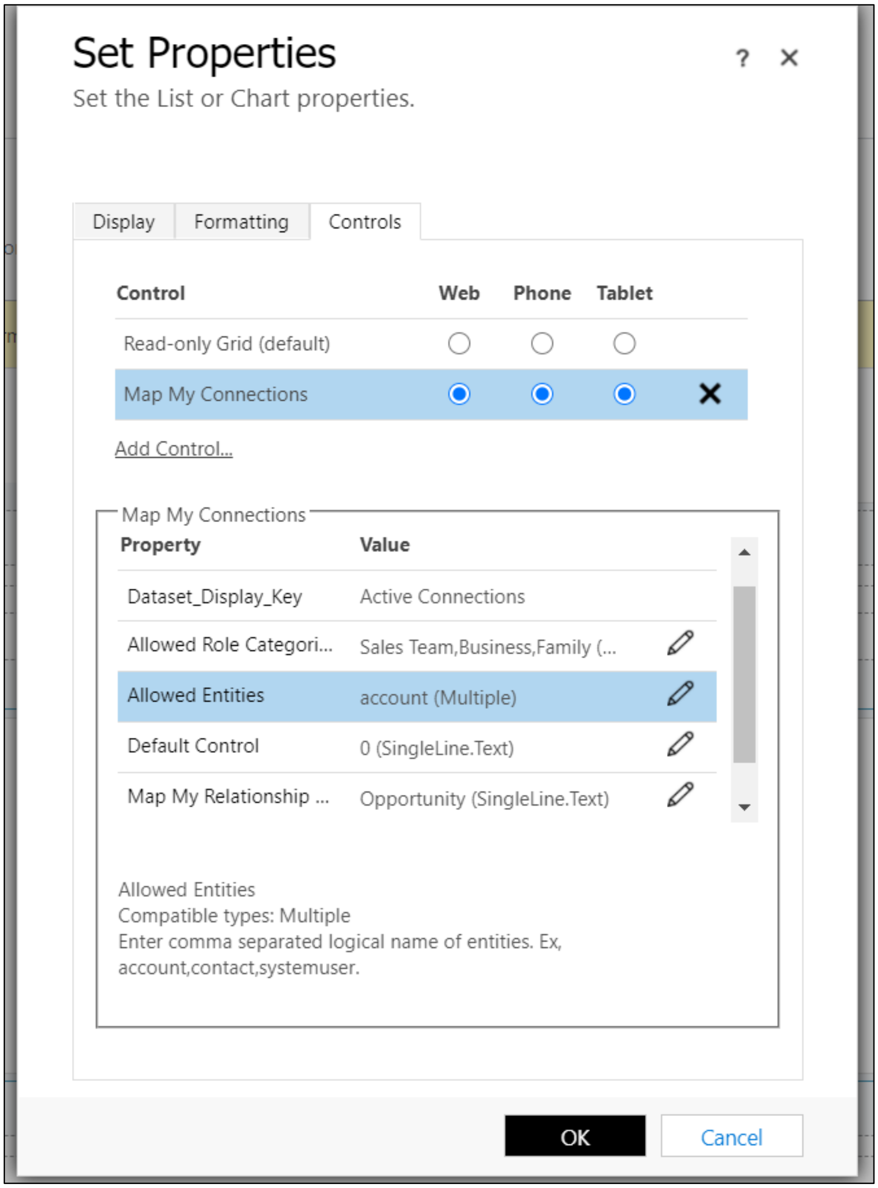
Allowed Entities: The entities that you put here will list out under **'Select Entity'** on the **'Create Connection'** form while adding a connection to the opportunity. This will allow user to connect the record of only these mentioned entities to the opportunity. You will need to make sure to enter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

You can see the logical name of an entity here -

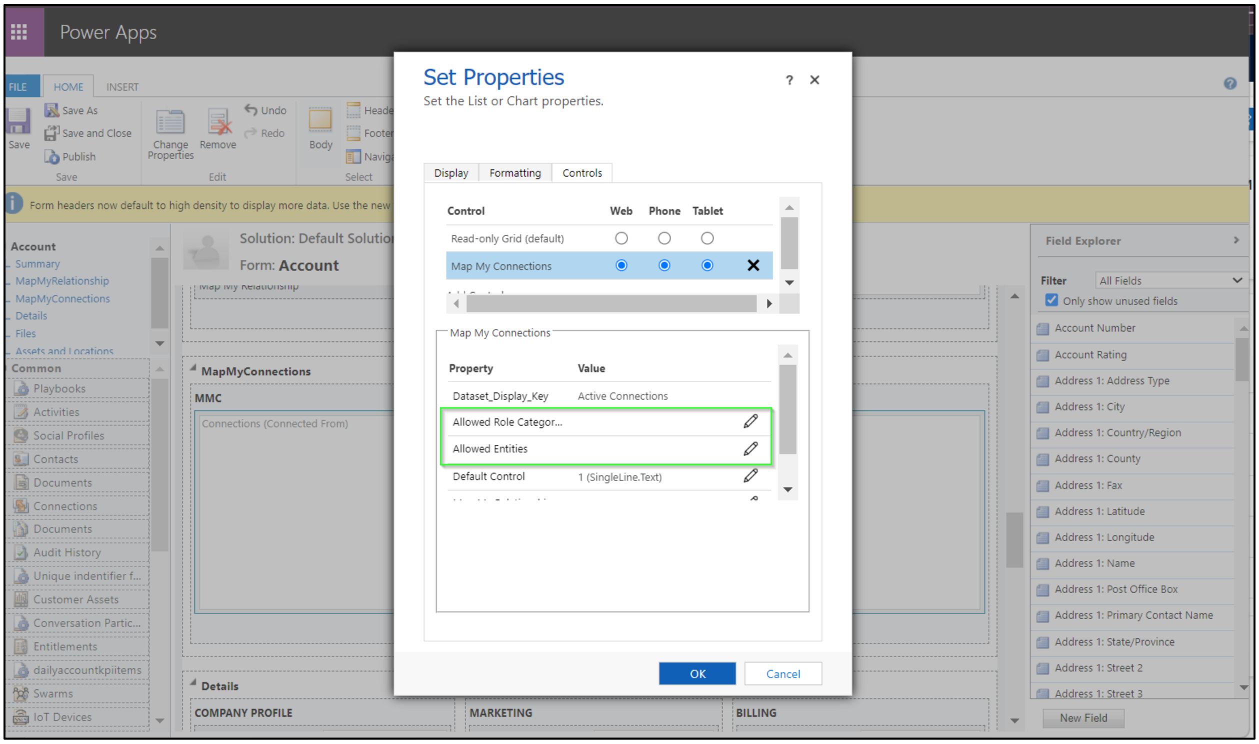


Here, we will enter **'account'** entity.



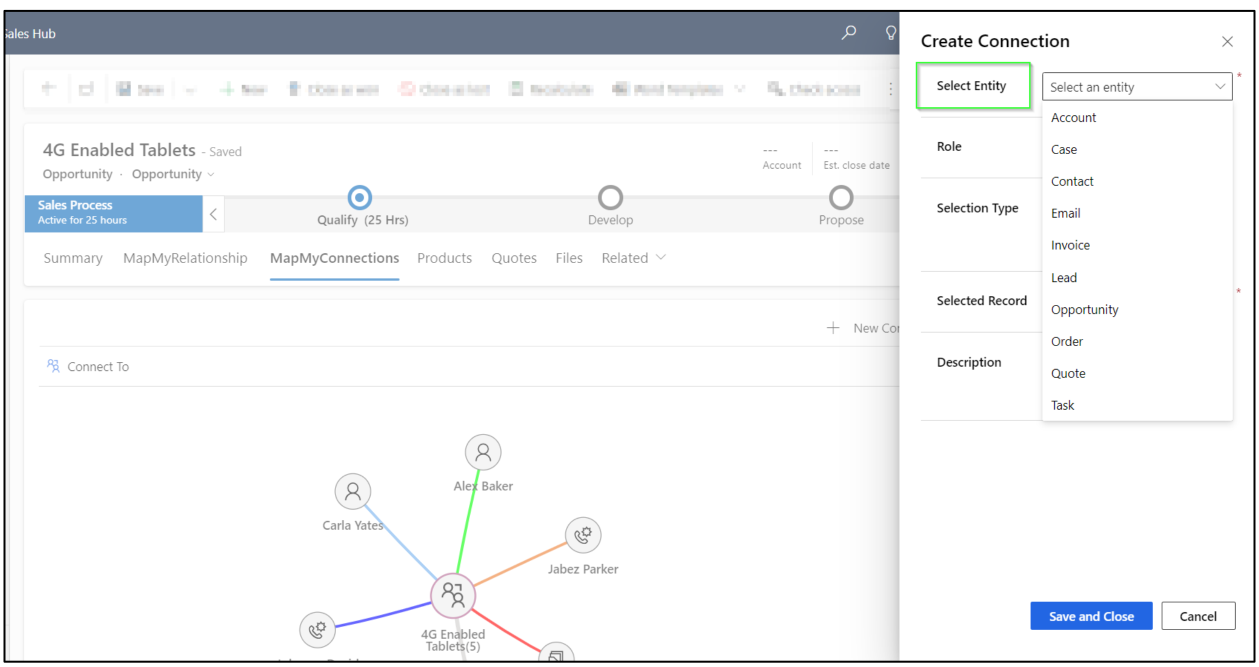


If no specific **Allowed Role Categories or Entities** are defined in the **Map My Connections control**.

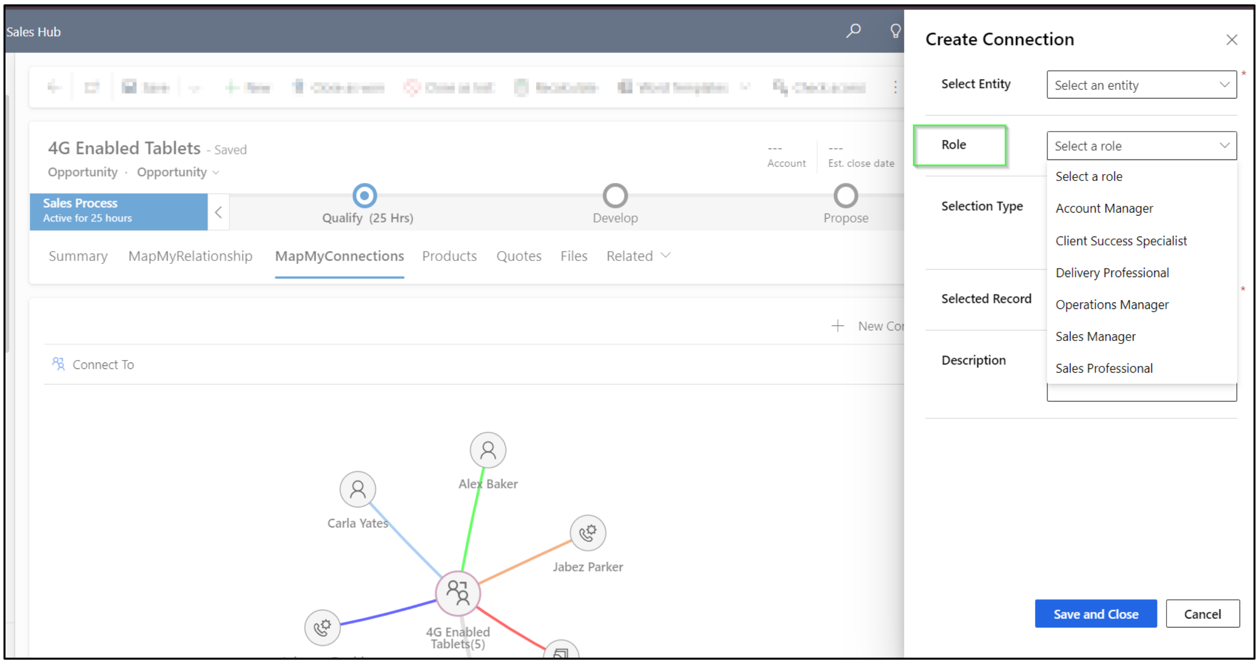


The system will display all roles and entities by default when creating a connection. As shown in the screenshots below:

Entities:



Roles:

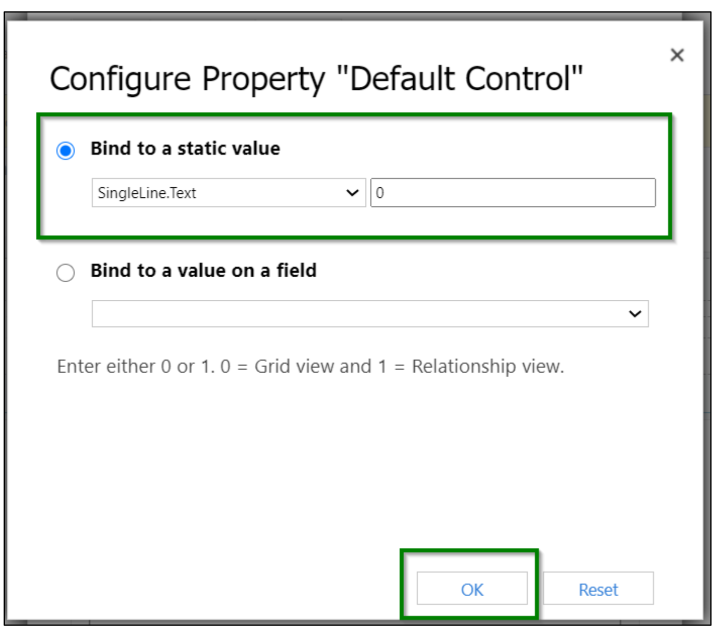


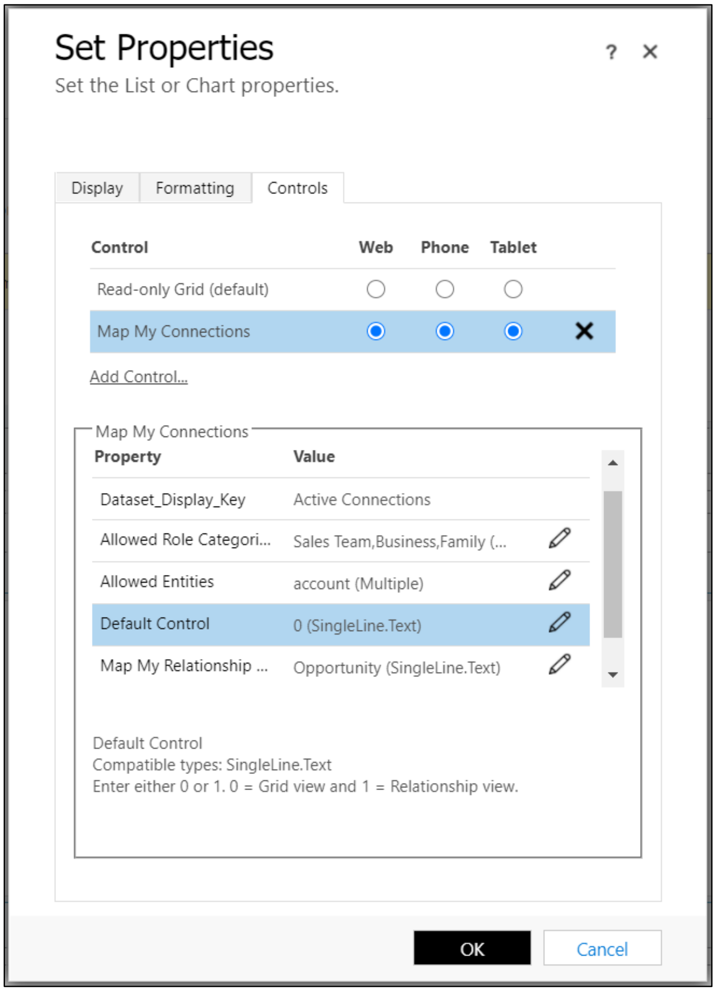
Default Control: You will need to set this field as either **0 or 1**.

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

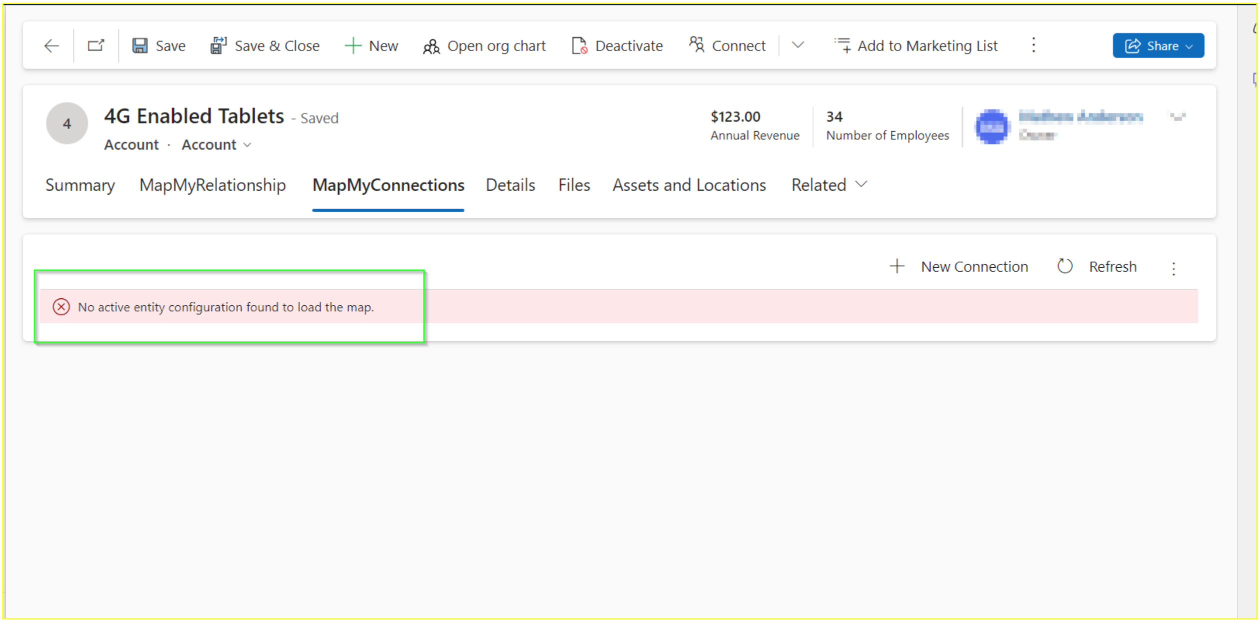
1 = Default view would be **'Relationship'** view.

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



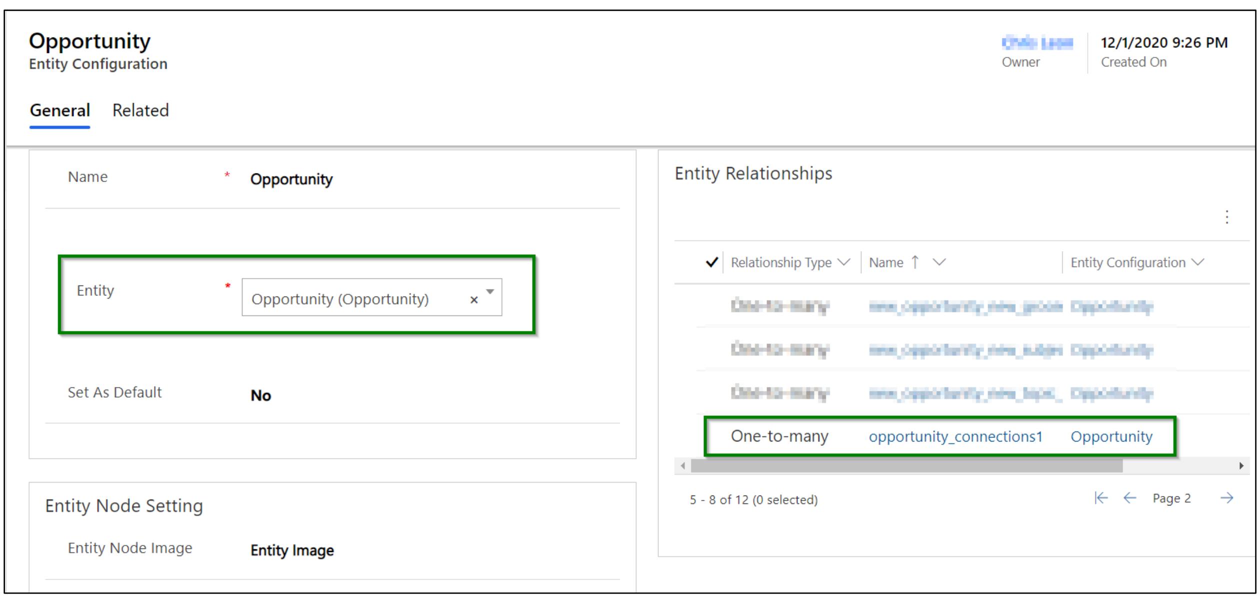


Map My Relationship Control Configuration: It is mandatory for user to enter the name of Map My Relationship configuration if the user wishes to see the connections in the **relationship view** through the connection control. So, despite having the Map My Relationship configuration in the system, it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

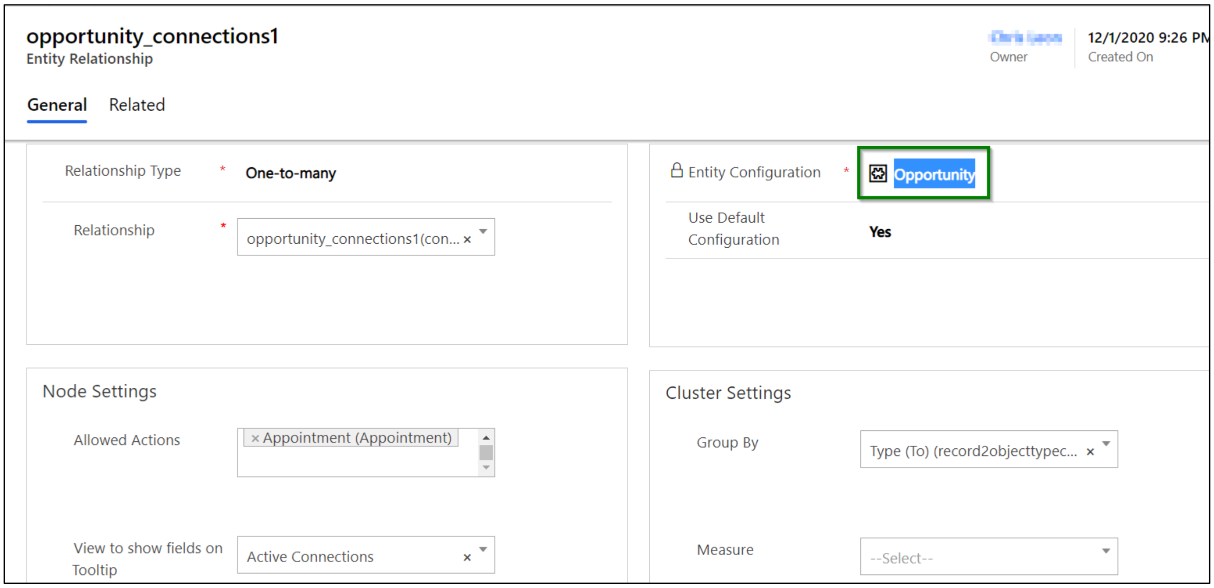


Considering that the below Map My Relationship configuration is present in the system, let's enter its name while configuring the connection control.

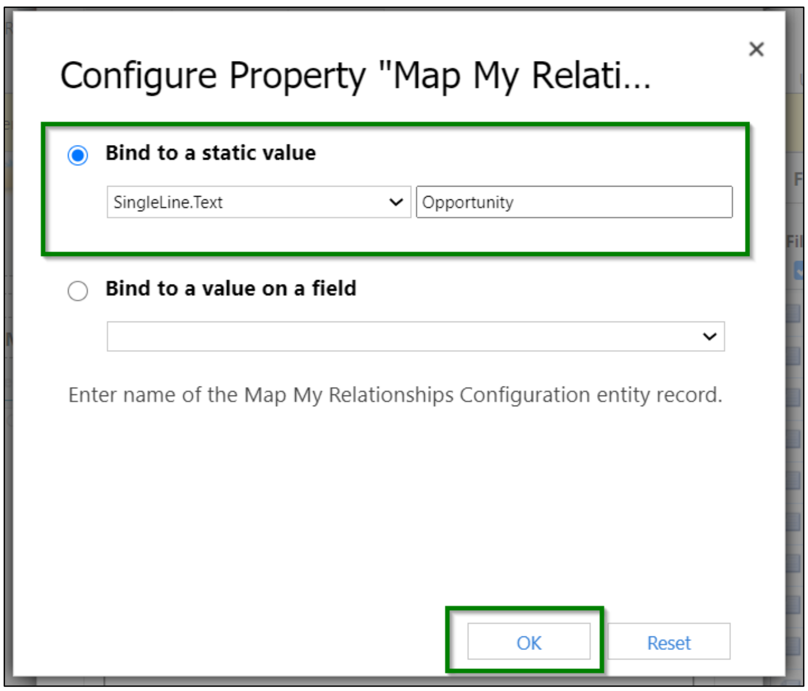
Entity configuration:–

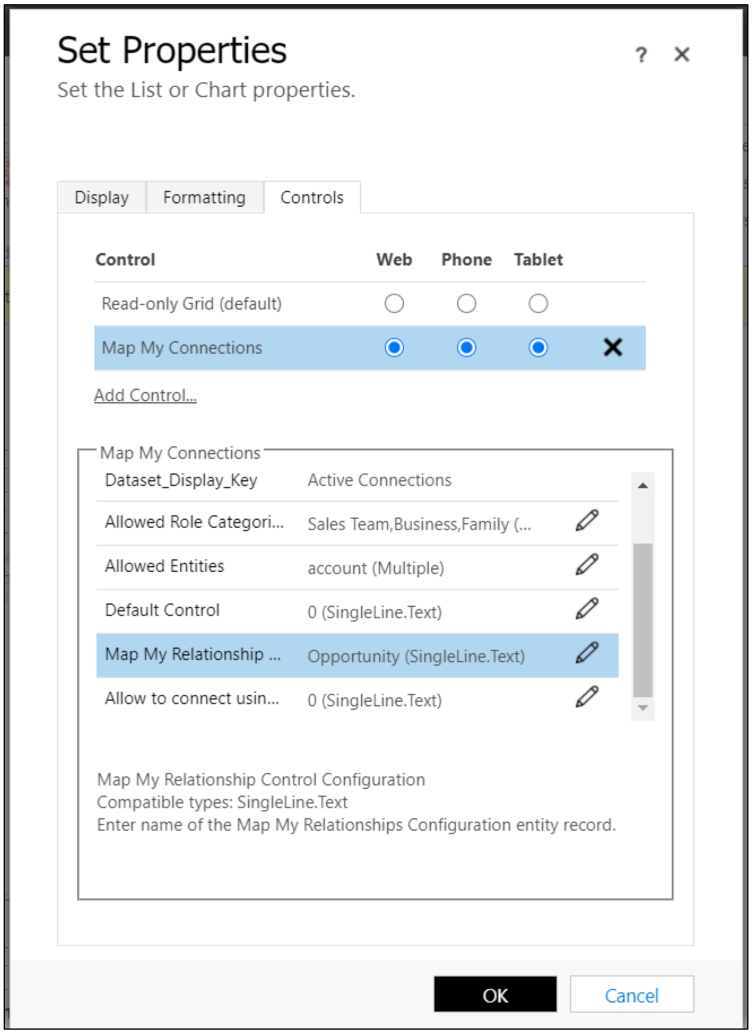


Relationship configuration:–



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





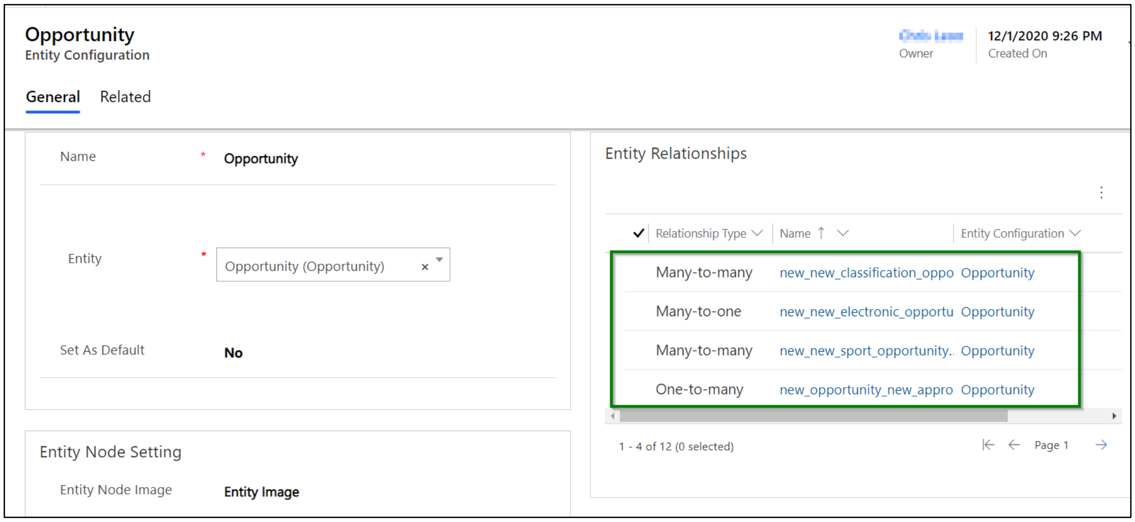
Allow to connect using Relationships Map: This parameter decides whether user can search for a record through the relationships view for adding a connection. You will have to set either **0 or 1** to this field.

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

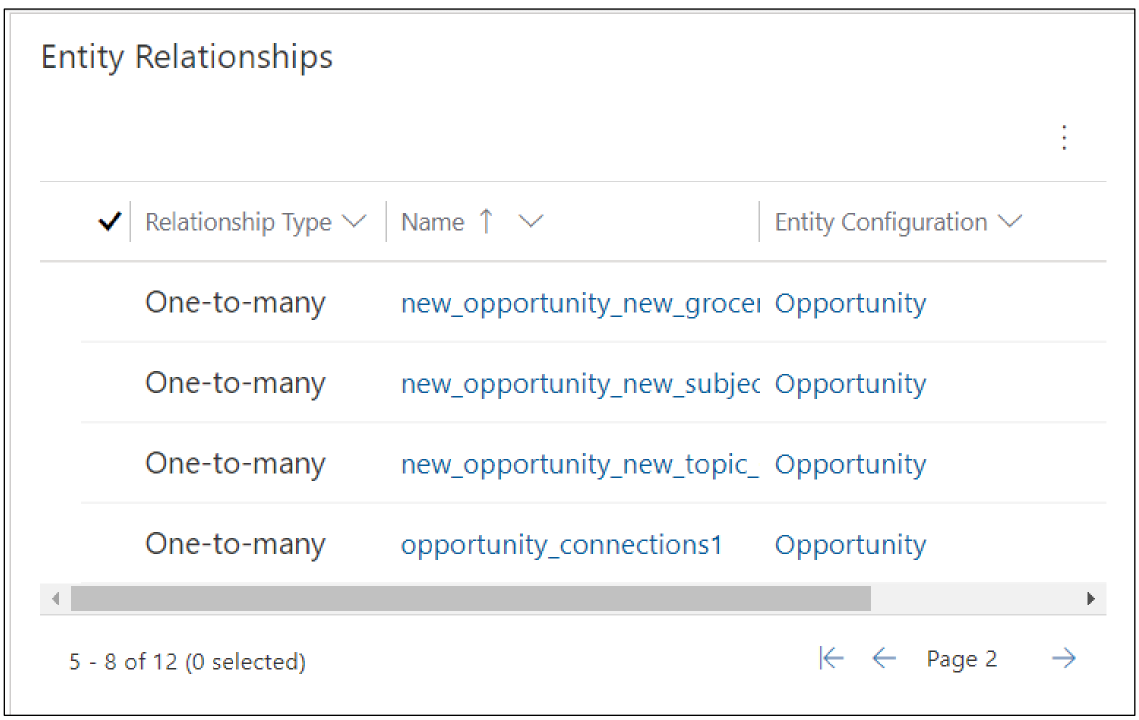
1 = **'Relationship View'** option will **not be** available under **'Selection Type'** (User won't be able to search for a record through the relationship view).

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

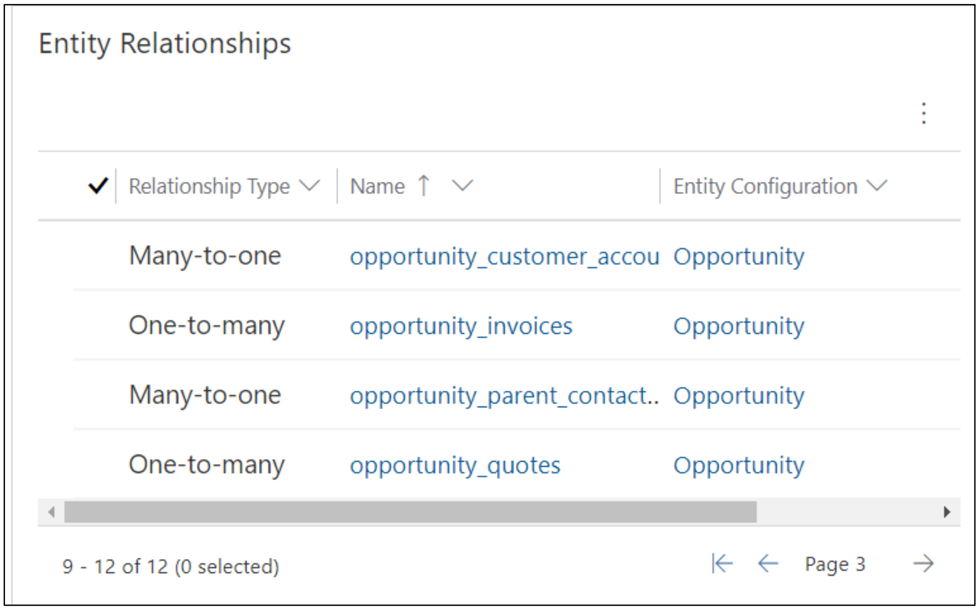
Entity configuration:-



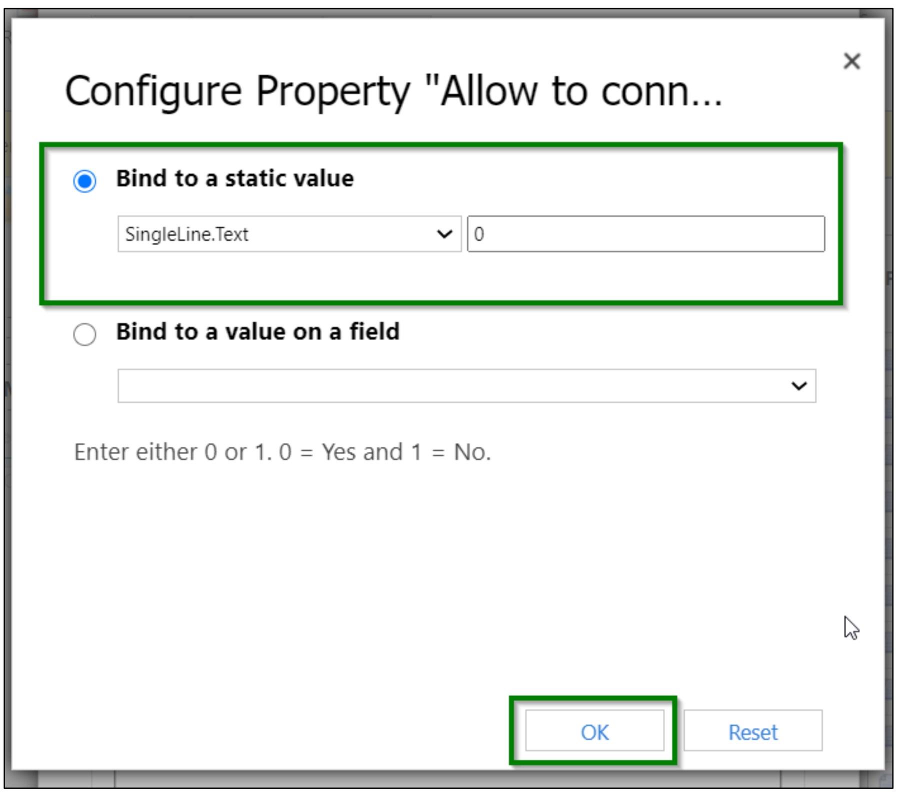
Few more relationships:-

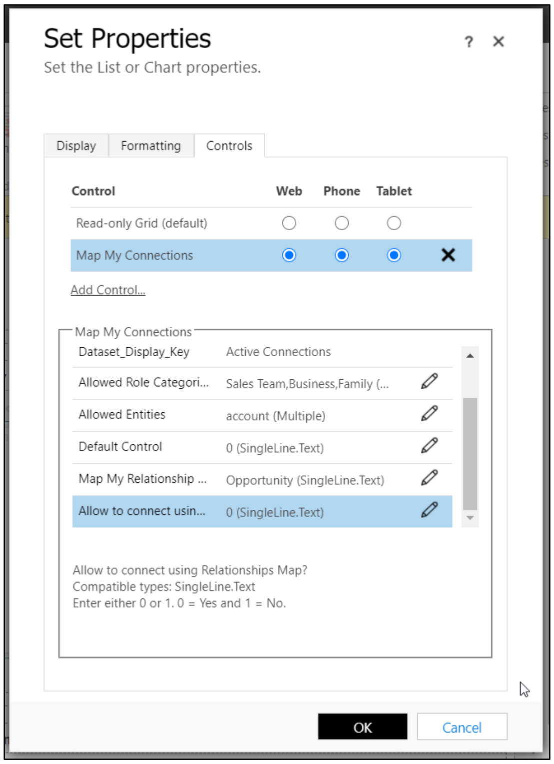


Further few relationships:-

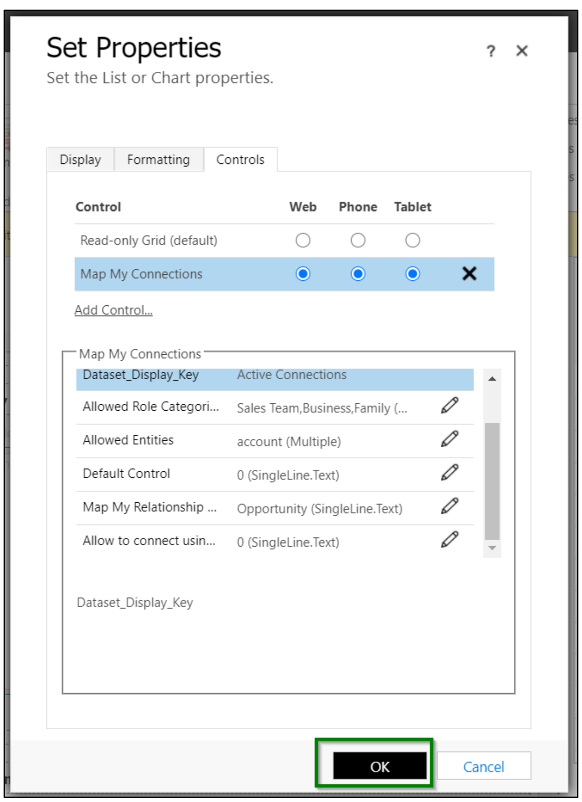


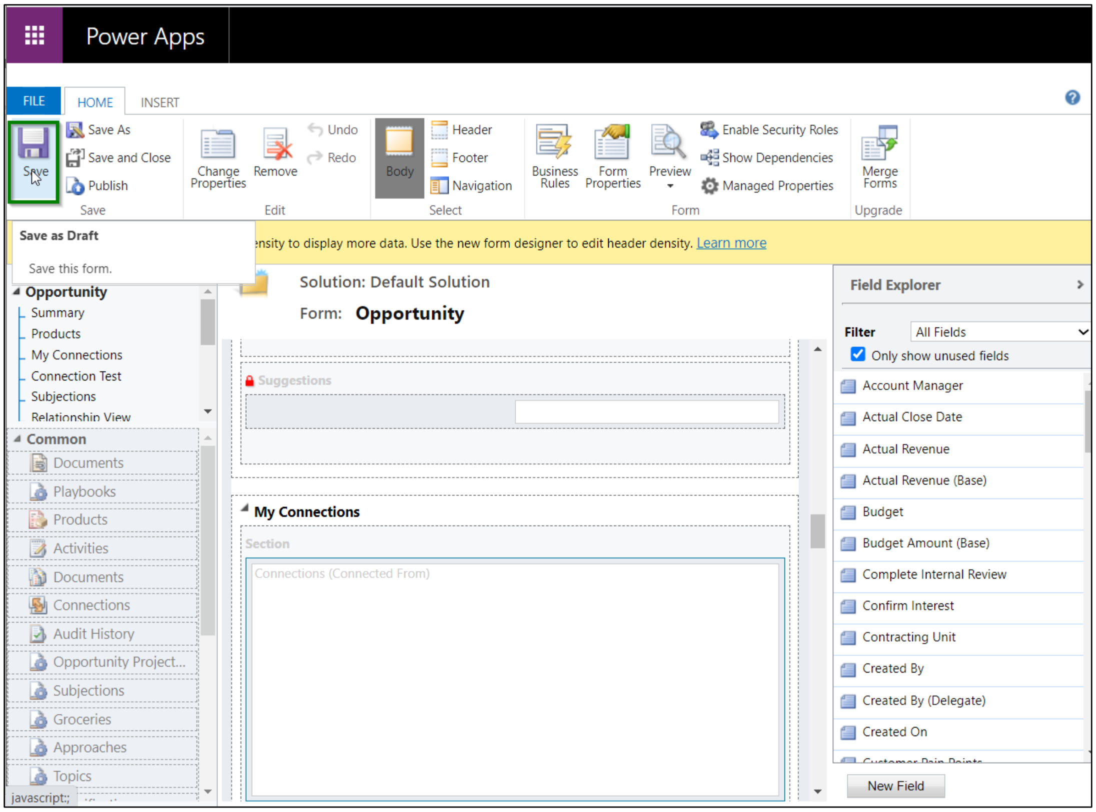
Let's set the value as **'0'** for **'Allow to connect using Relationships Map'**.

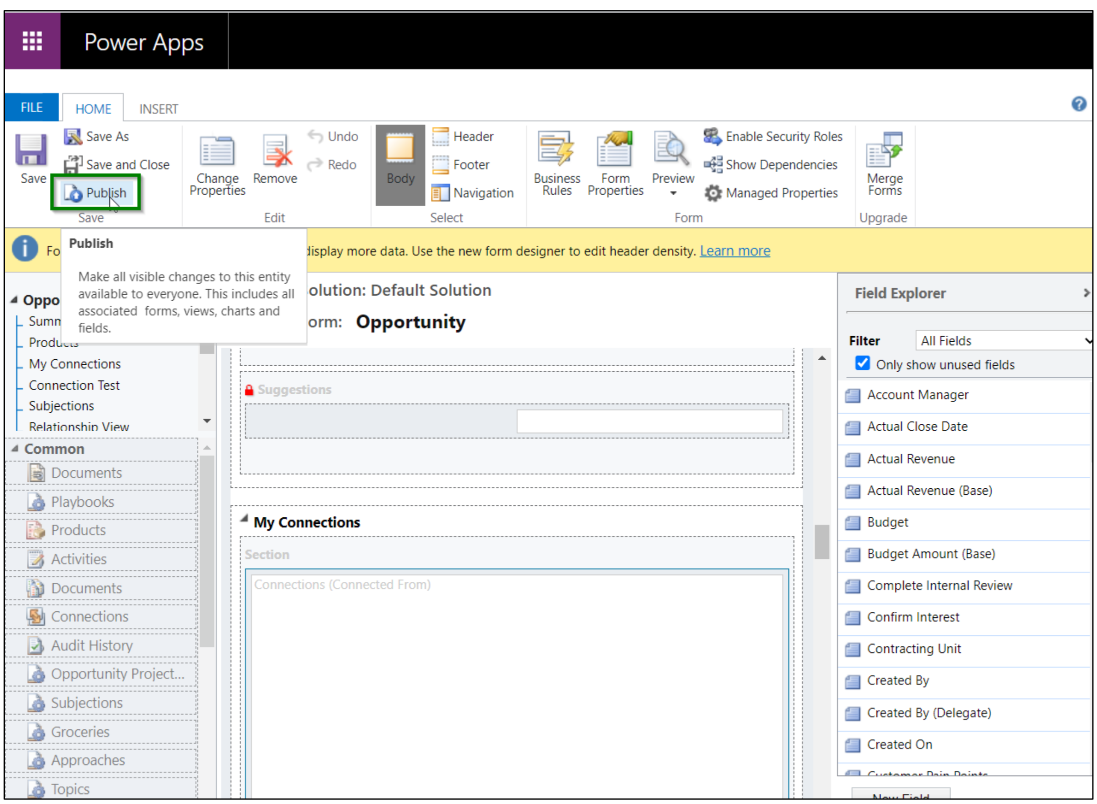




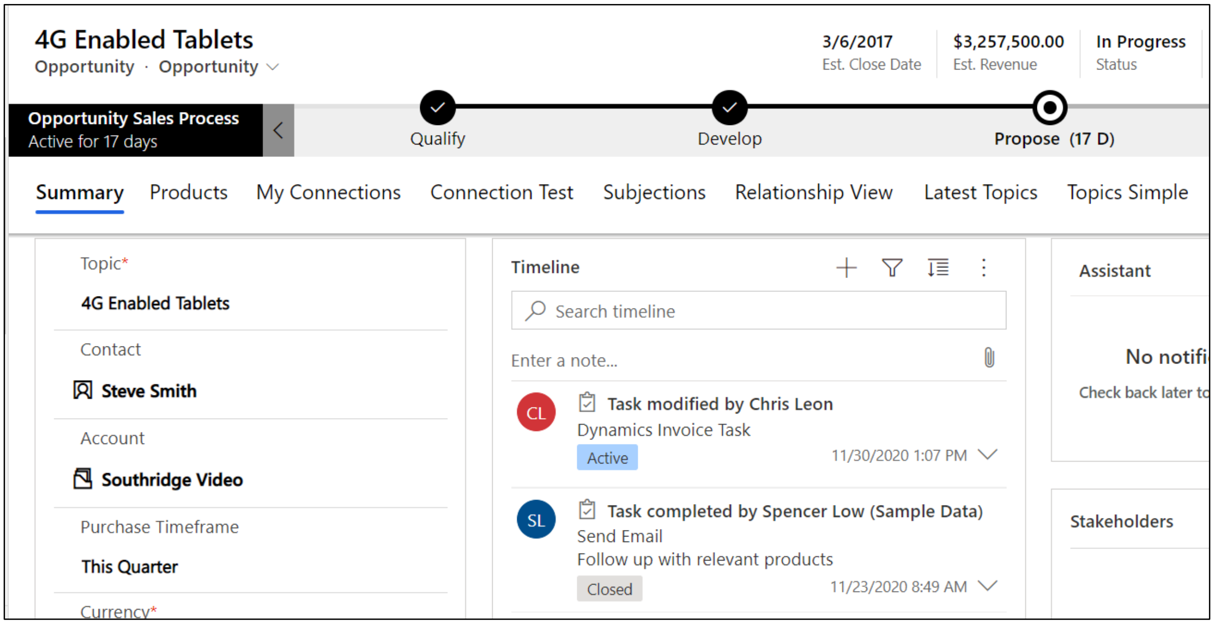
8) Once done with setting up all the required parameters for the connection control, let's **save and publish** these customizations.



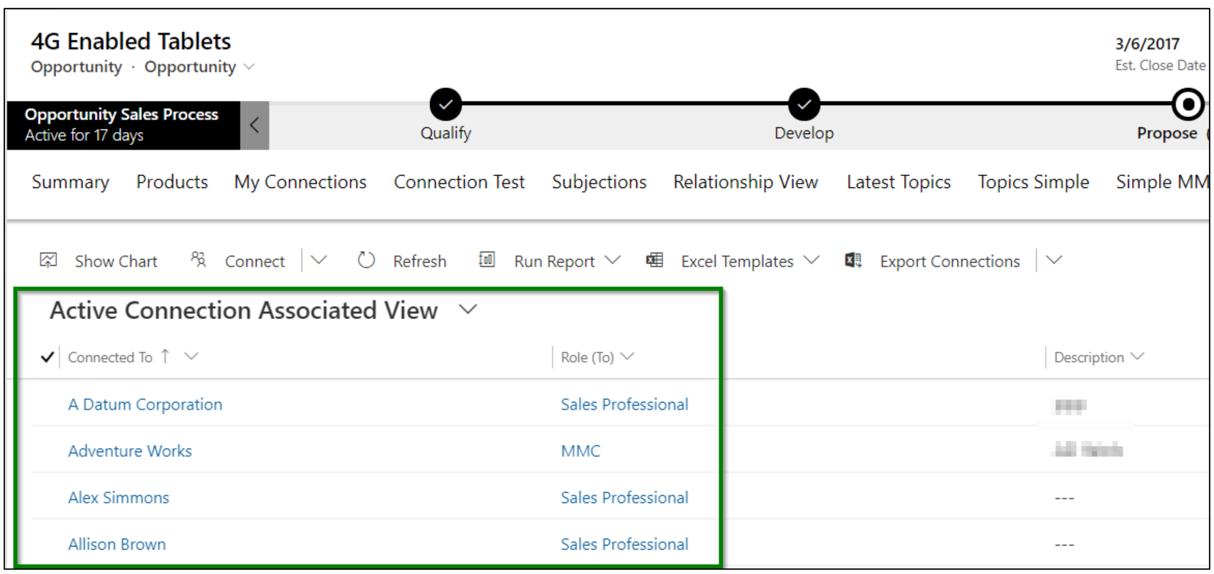

Power Apps
FILE
HOME
INSERT
Save
Save As
Save and Close
Publish
Change Properties
Remove
Undo
Redo
Edit
Body
Header
Footer
Navigation
Select
Business Rules
Form Properties
Preview
Enable Security Roles
Show Dependencies
Managed Properties
Form
Merge Forms
Upgrade
Save as Draft
Save this form.
nsity to display more data. Use the new form designer to edit header density. Learn more
Solution: Default Solution
Form: Opportunity
Opportunity
Summary
Products
My Connections
Connection Test
Subjections
Relationship View
Common
Documents
Playbooks
Products
Activities
Documents
Connections
Audit History
Opportunity Project...
Subjections
Groceries
Approaches
Topics
javascript:;
Suggestions
My Connections
Section
Connections (Connected From)
Field Explorer
Filter
All Fields
Only show unused fields
Account Manager
Actual Close Date
Actual Revenue
Actual Revenue (Base)
Budget
Budget Amount (Base)
Complete Internal Review
Confirm Interest
Contracting Unit
Created By
Created By (Delegate)
Created On
New Field


Power Apps
FILE
HOME
INSERT
Save
Save As
Save and Close
Publish
Change Properties
Remove
Undo
Redo
Edit
Body
Header
Footer
Navigation
Select
Business Rules
Form Properties
Preview
Enable Security Roles
Show Dependencies
Managed Properties
Form
Merge Forms
Upgrade
Publish
Make all visible changes to this entity available to everyone. This includes all associated forms, views, charts and fields.
display more data. Use the new form designer to edit header density. Learn more
olution: Default Solution
orm: Opportunity
My Connections
Connection Test
Subjections
Relationship View
Common
Documents
Playbooks
Products
Activities
Documents
Connections
Audit History
Opportunity Project...
Subjections
Groceries
Approaches
Topics
Suggestions
My Connections
Section
Connections (Connected From)
Field Explorer
Filter
All Fields
Only show unused fields
Account Manager
Actual Close Date
Actual Revenue
Actual Revenue (Base)
Budget
Budget Amount (Base)
Complete Internal Review
Confirm Interest
Contracting Unit
Created By
Created By (Delegate)
Created On

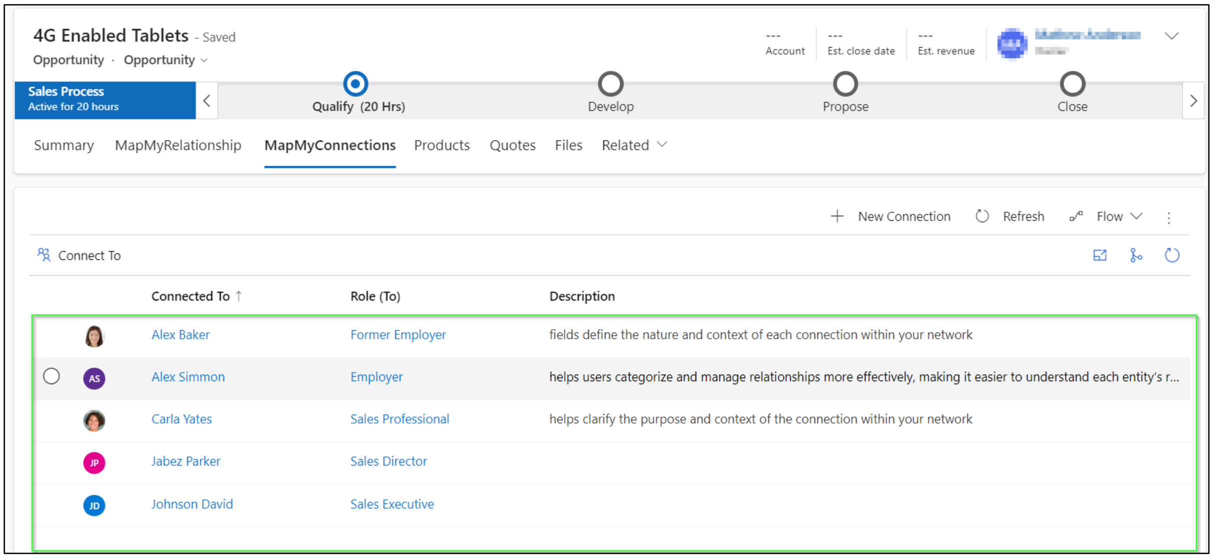
9) Now, go back to **Opportunity** record.



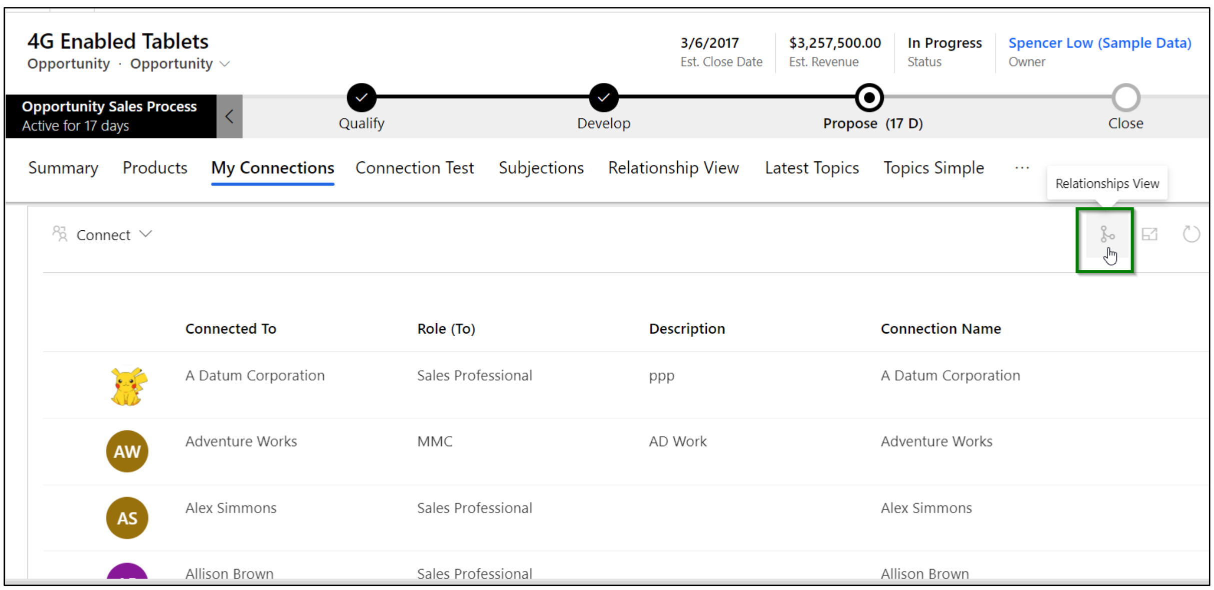
Let's say this opportunity has some connection records already.



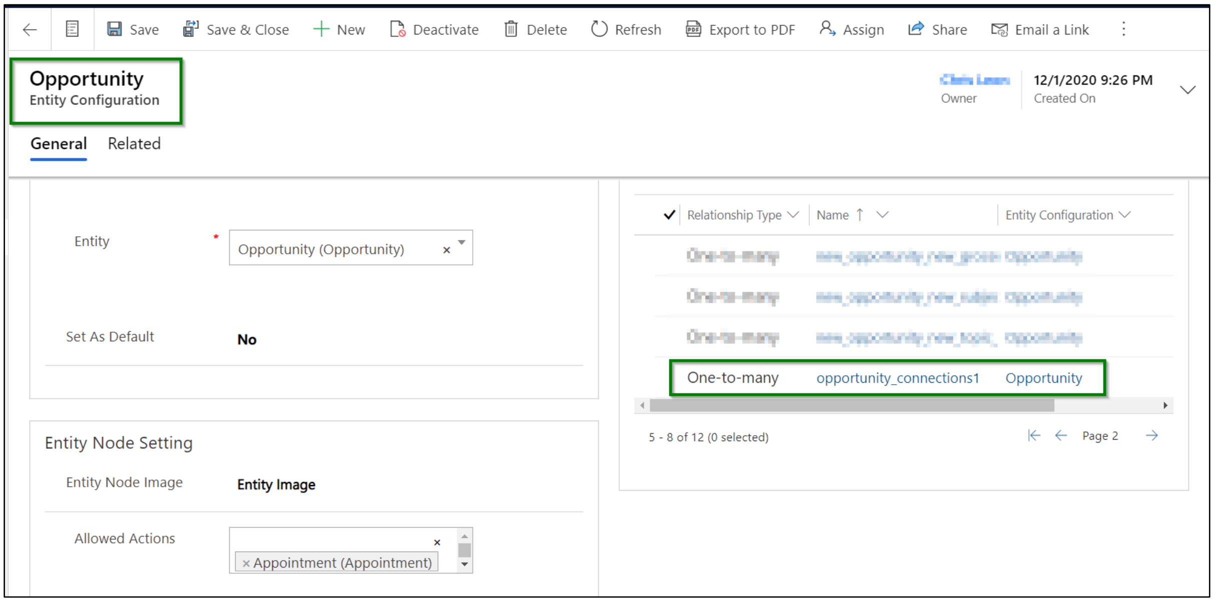
10) Now navigate to the connection control which we configured earlier above through the customizations. The connection records will show in the grid.



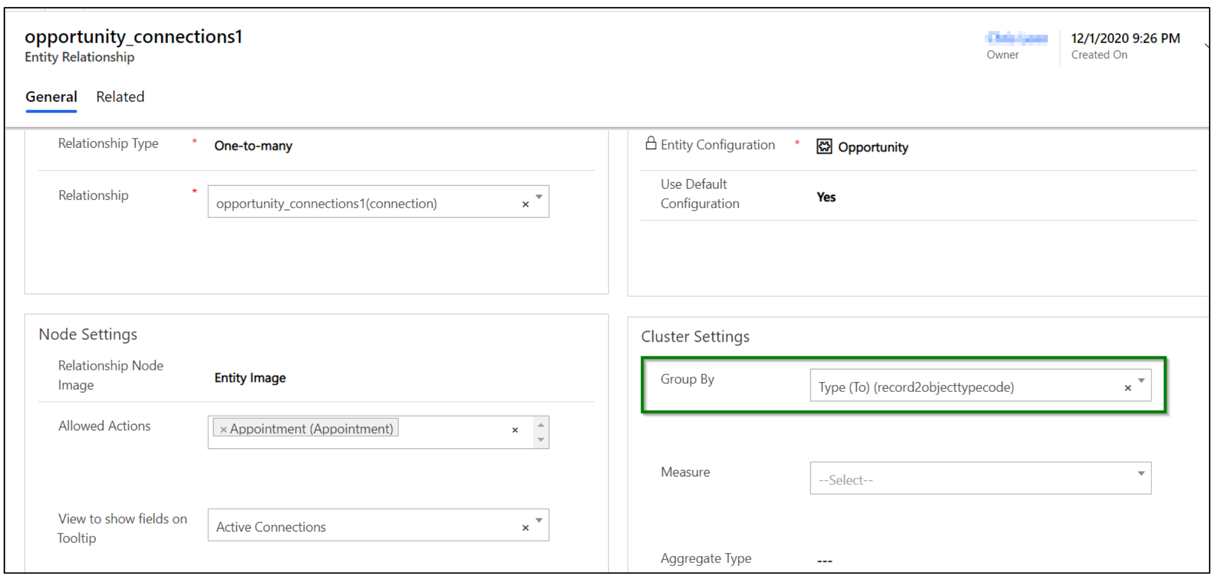
11) You can also switch this to relationship view.



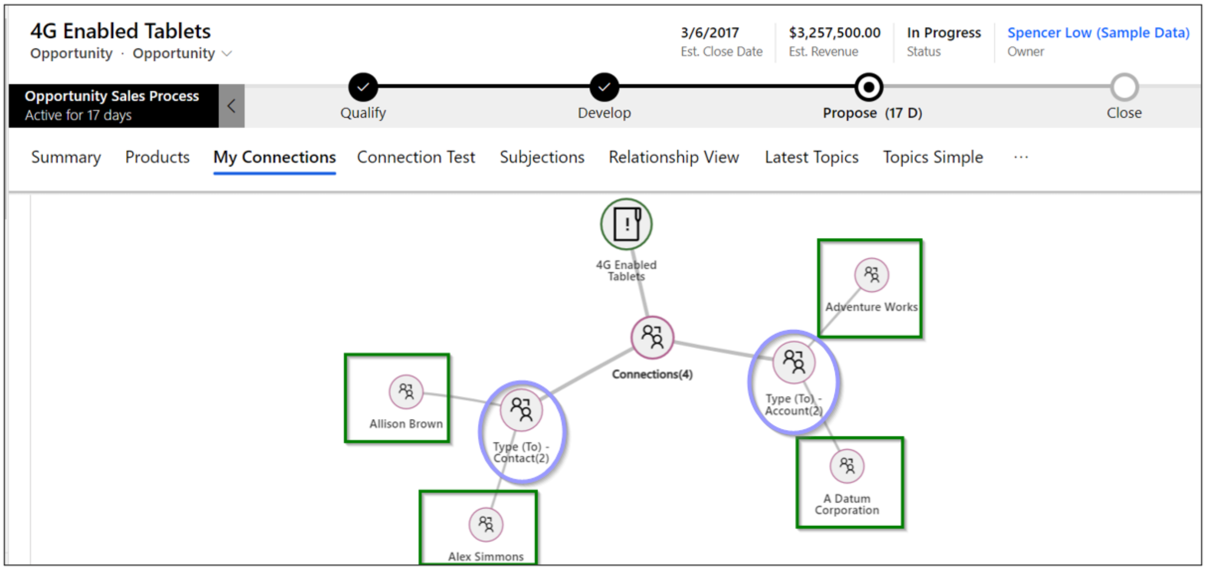
12) It will show you the connection records in relationship view format. Switching it back to grid view will show you these connection records in grid format, this is how user can change between these two views. Here, you are seeing the records are individually categorized in **'Account'** and **'Contact'**,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



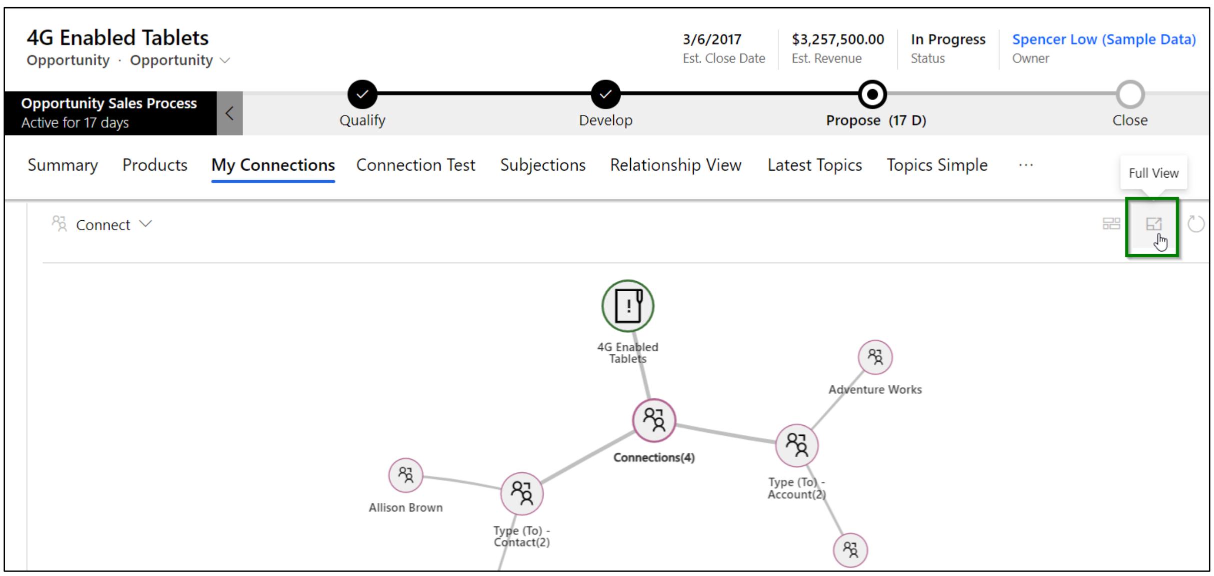
Save
Save & Close
New
Deactivate
Delete
Refresh
Export to PDF
Assign
Share
Email a Link
Opportunity
Entity Configuration
12/1/2020 9:26 PM
Owner
Created On
General
Related
Entity
Opportunity (Opportunity)
Set As Default
No
Entity Node Setting
Entity Node Image
Entity Image
Allowed Actions
Appointment (Appointment)
Relationship Type
Name
Entity Configuration
One-to-many
opportunity_connections1
Opportunity
5 - 8 of 12 (0 selected)
Page 2



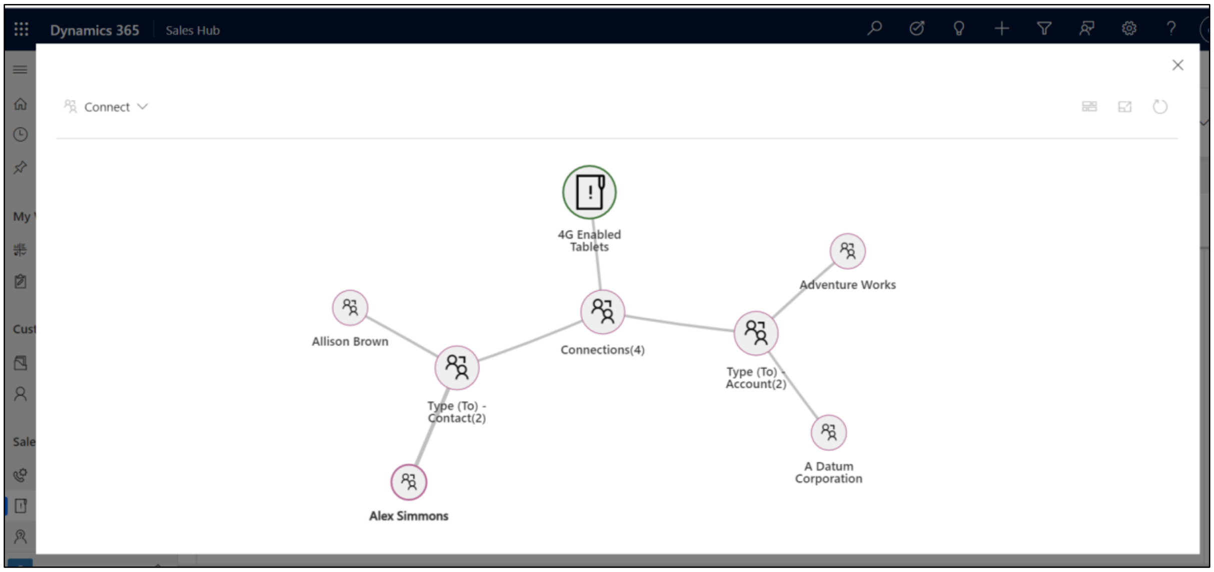
opportunity_connections1
Entity Relationship
12/1/2020 9:26 PM
Owner
Created On
General
Related
Relationship Type
One-to-many
Relationship
opportunity_connections1(connection)
Entity Configuration
Opportunity
Use Default Configuration
Yes
Node Settings
Relationship Node Image
Entity Image
Allowed Actions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



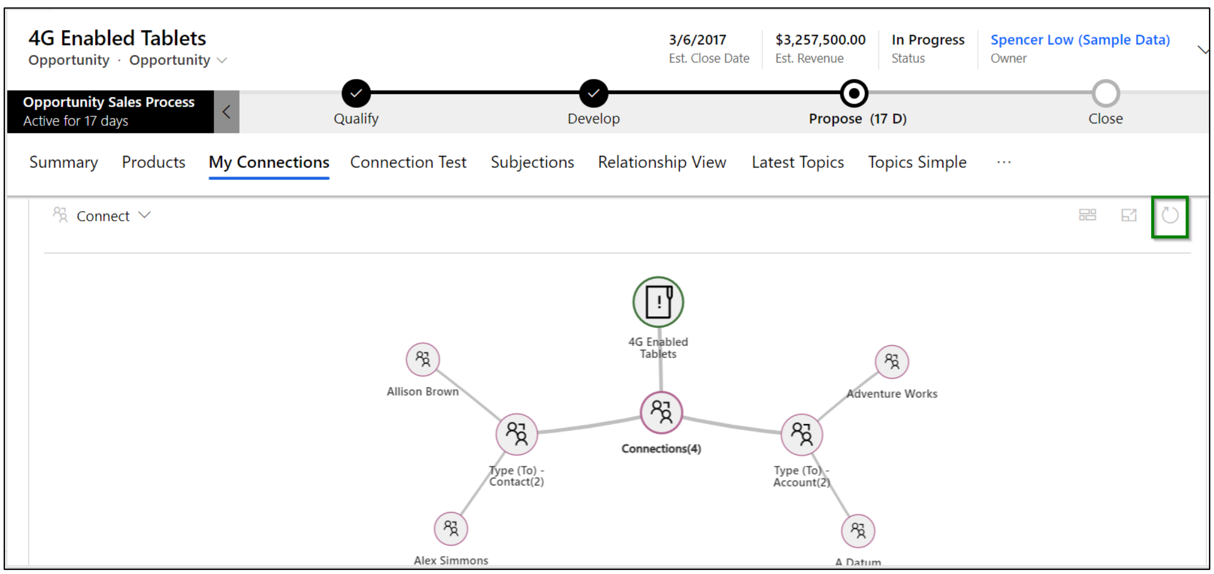
13) Click on **'Full View'** button on the right top corner of the control to see the data in expanded screen.



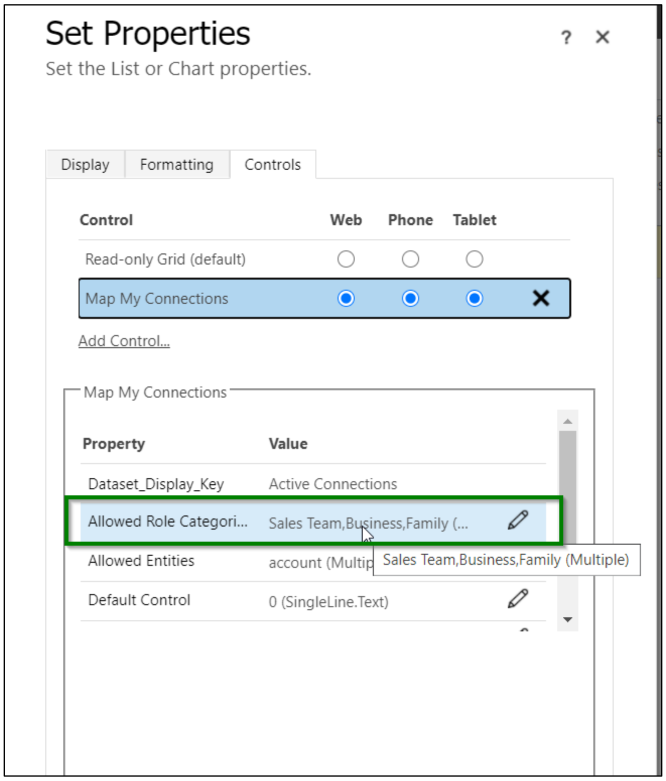
Expanded mode:-

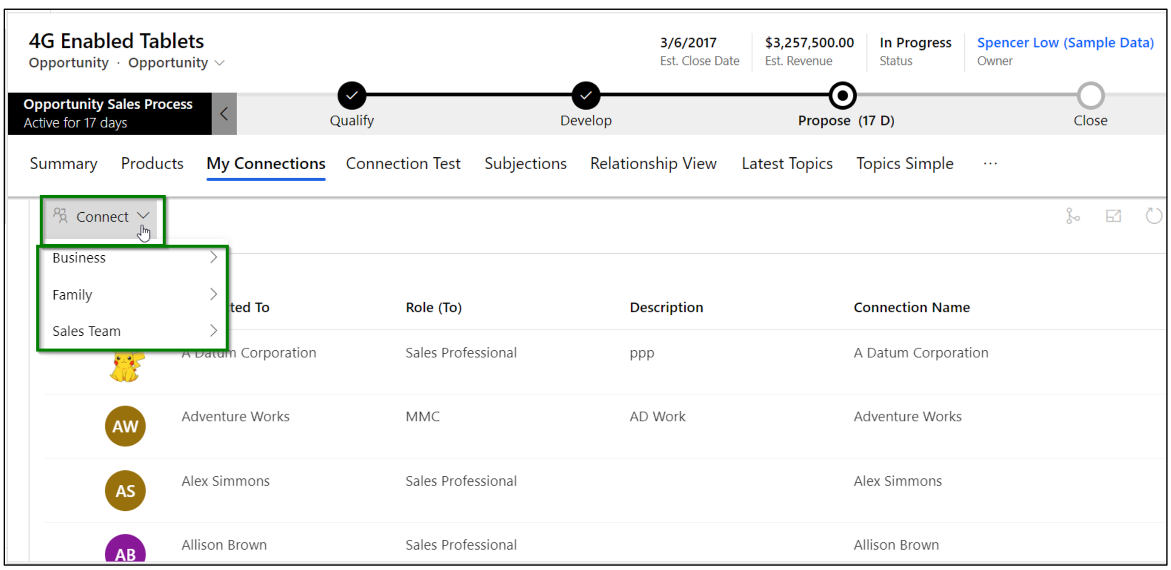


User can also refresh the control if required.

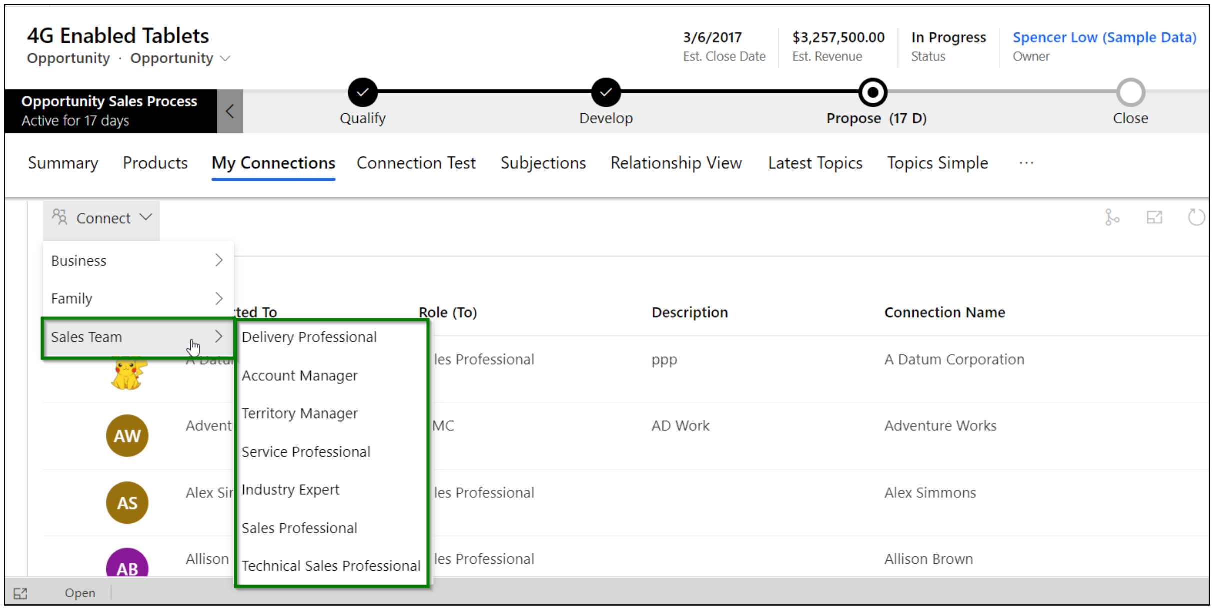


Now let's create a **new connection record** for **this opportunity**. It will display those categories which we configured earlier while binding the connection control.

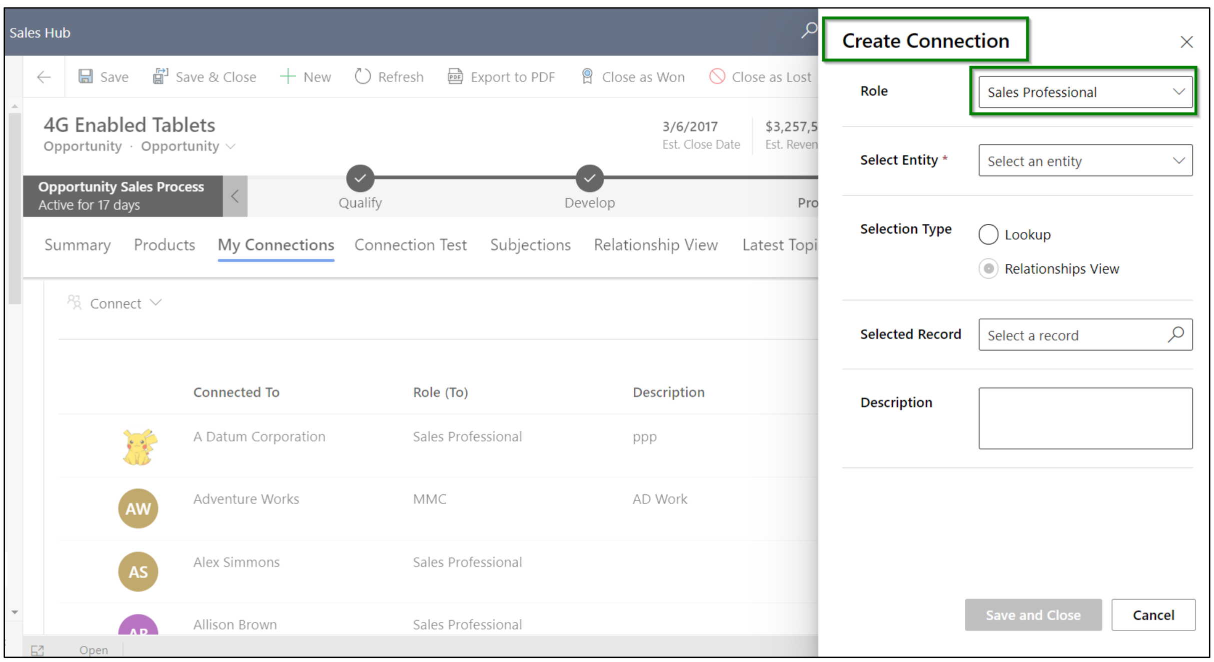




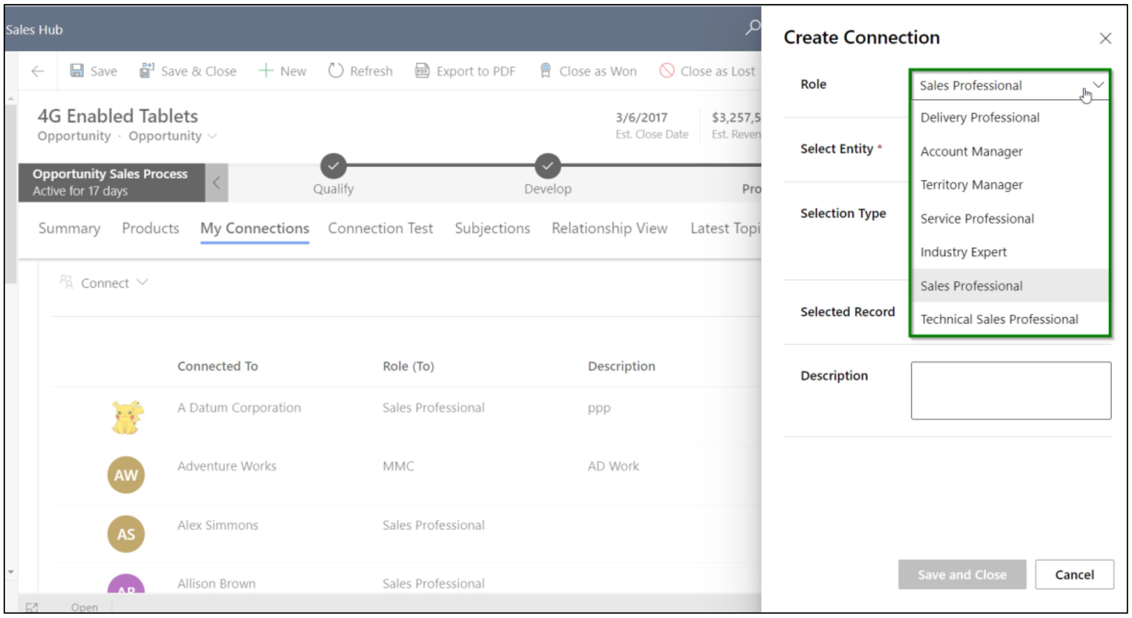
1) Let's pick **'Sales Team'** for now. It will list out all the connection roles that fall under this role category.



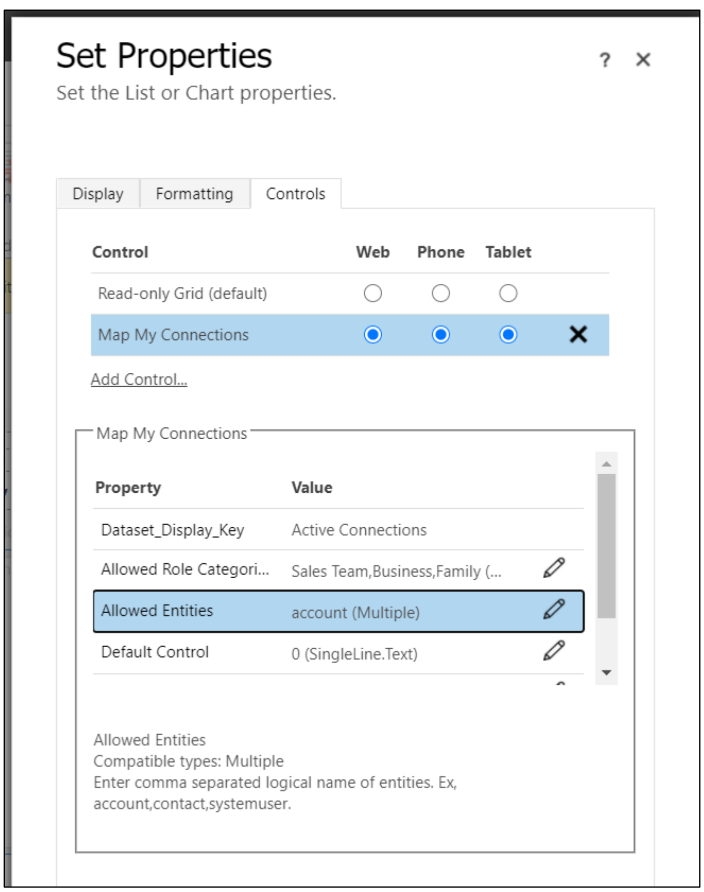
2) Select **'Sales Professional'**. This will open a quick create form where **'Role'** would come selected as by default since we have chosen **'Sales Professional'** earlier.

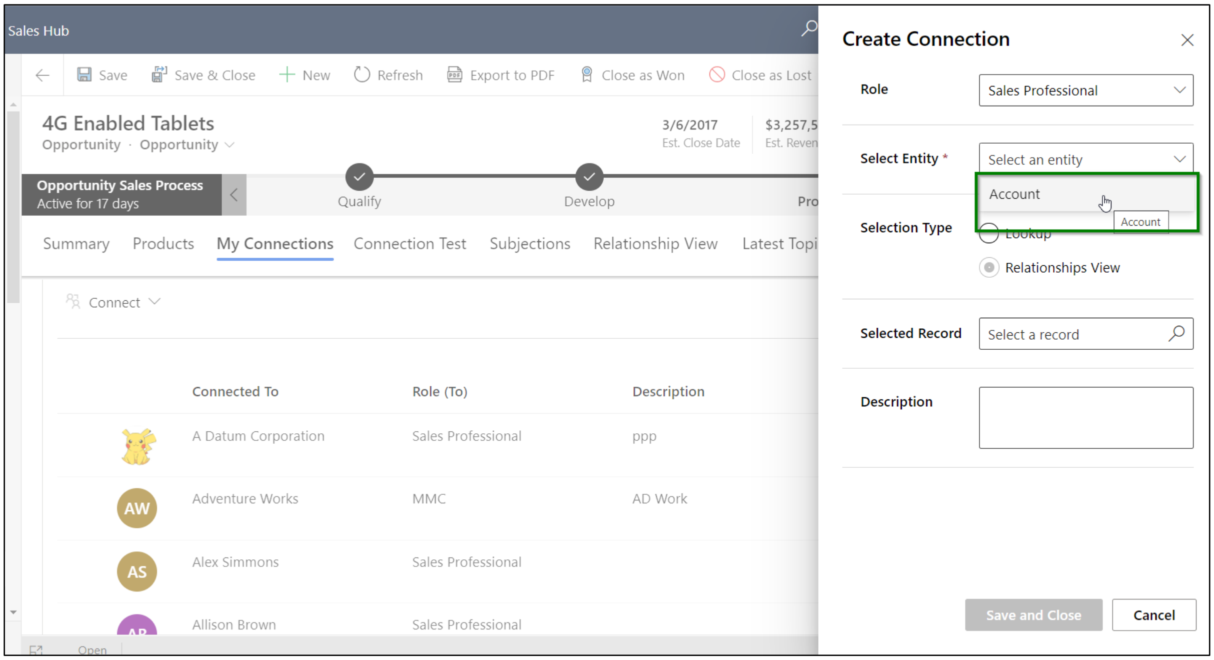


3) You can also change the connection role from here if required.

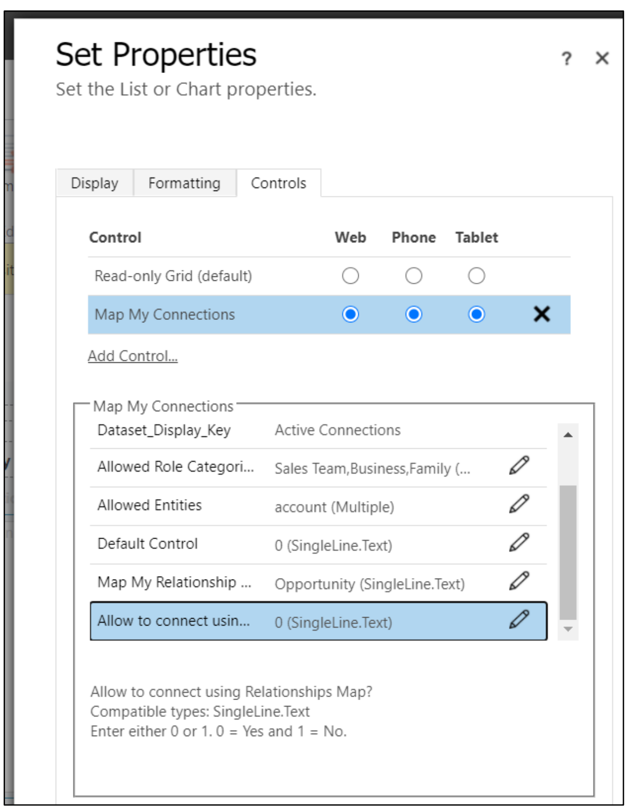


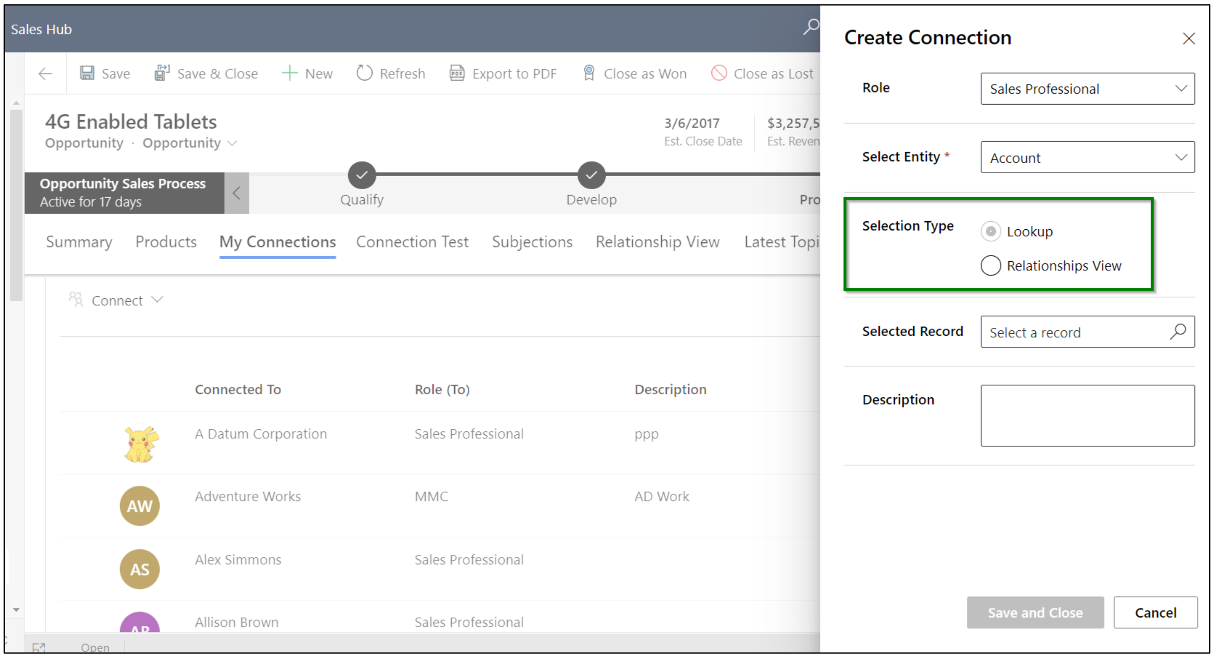
4) Let's keep **'Sales Professional'** for now and select the entity. All those entities that are entered in the connection control configuration will be listed here. We currently have only **'account'**.



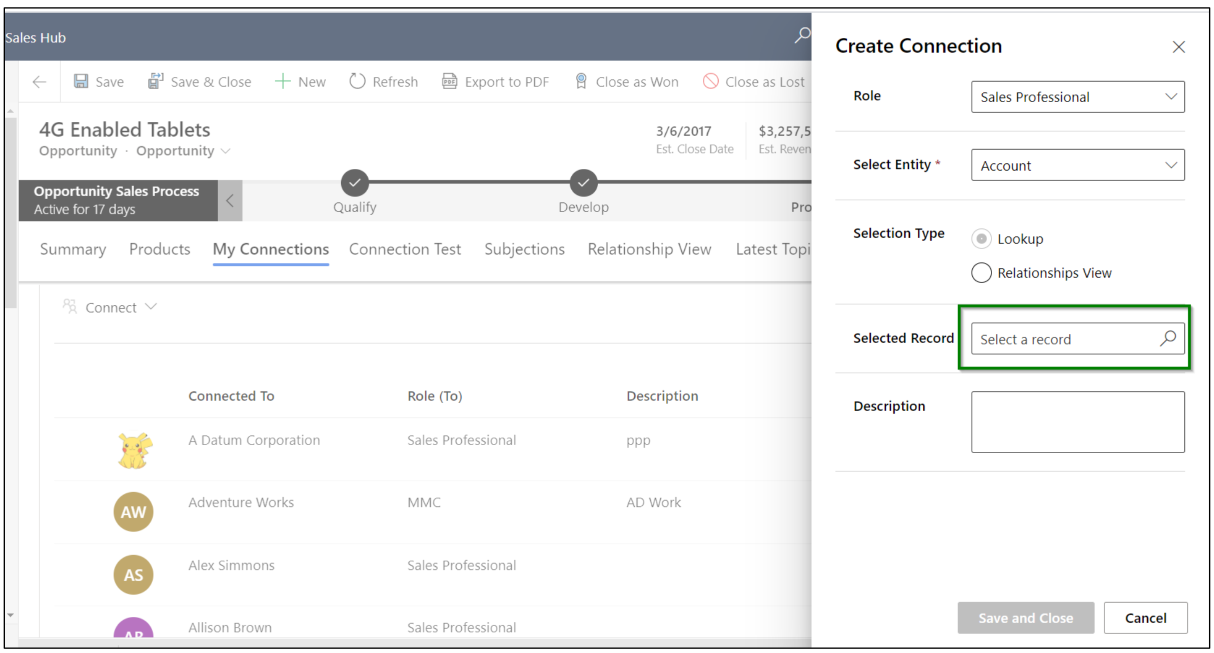


5) As we have set **'0'** for **'Allow to connect using Relationships Map'**, user will be shown both **'Lookup'** and **'Relationships View'** options under **'Selection Type'**. Setting the value as **'1'** will show only '**Lookup'** option in here.

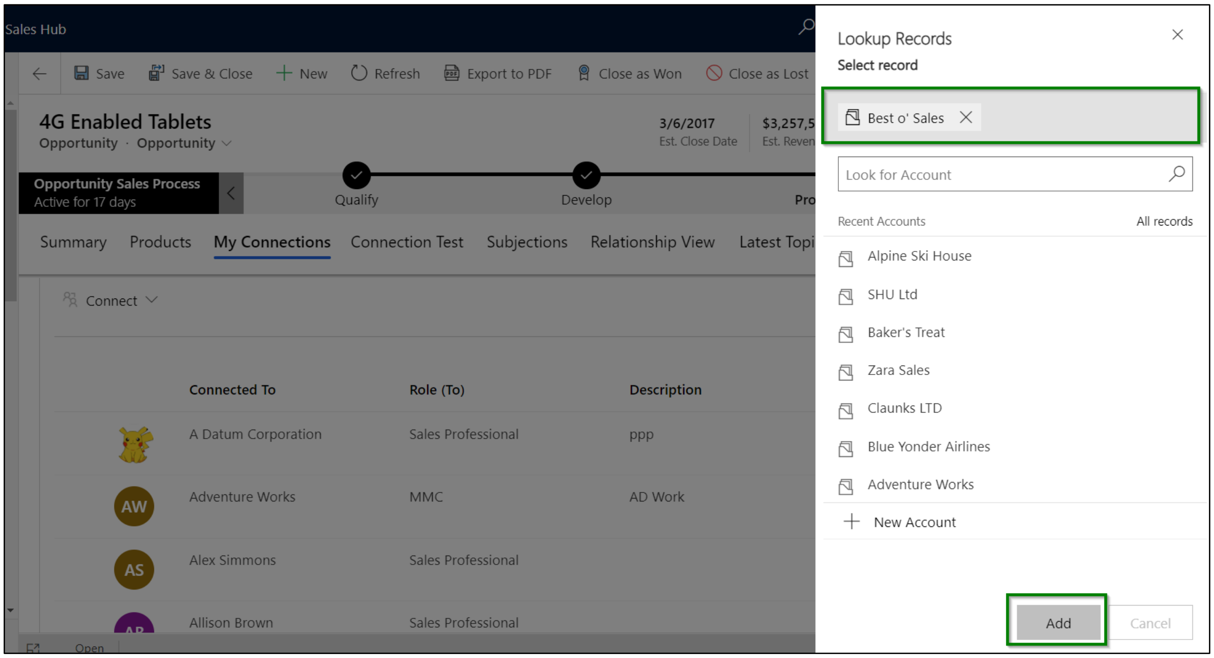




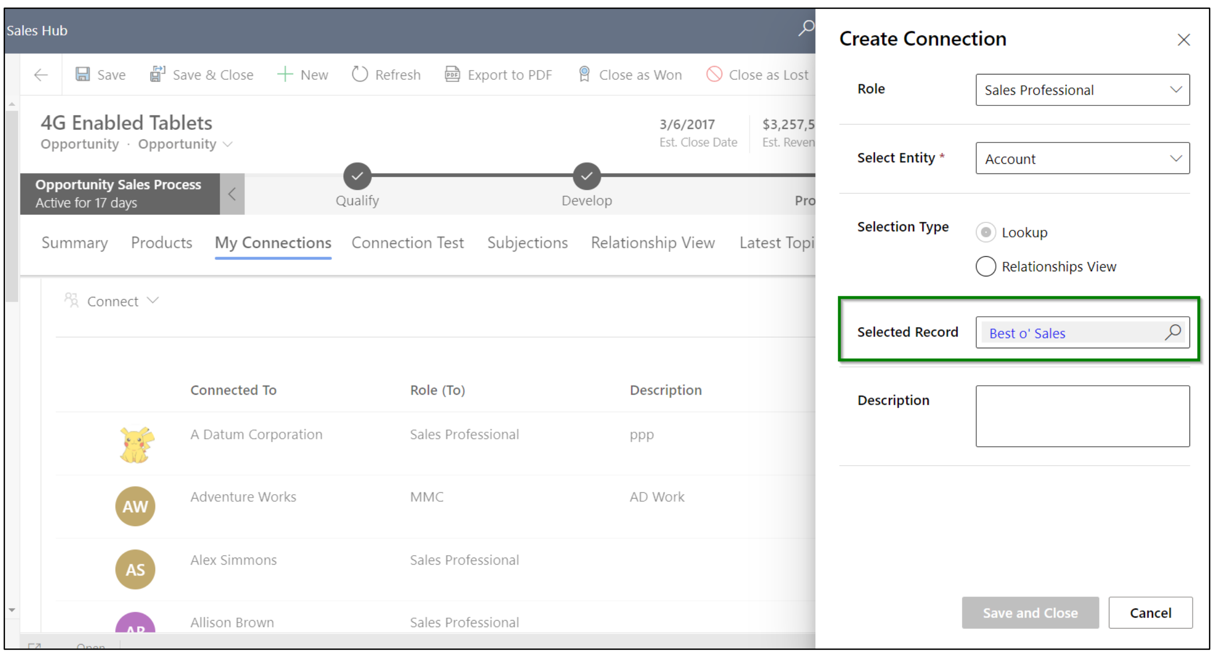
6) We have selected **'Lookup'** here as we want to search for a record through lookup field. Click on **'Select a record'**.



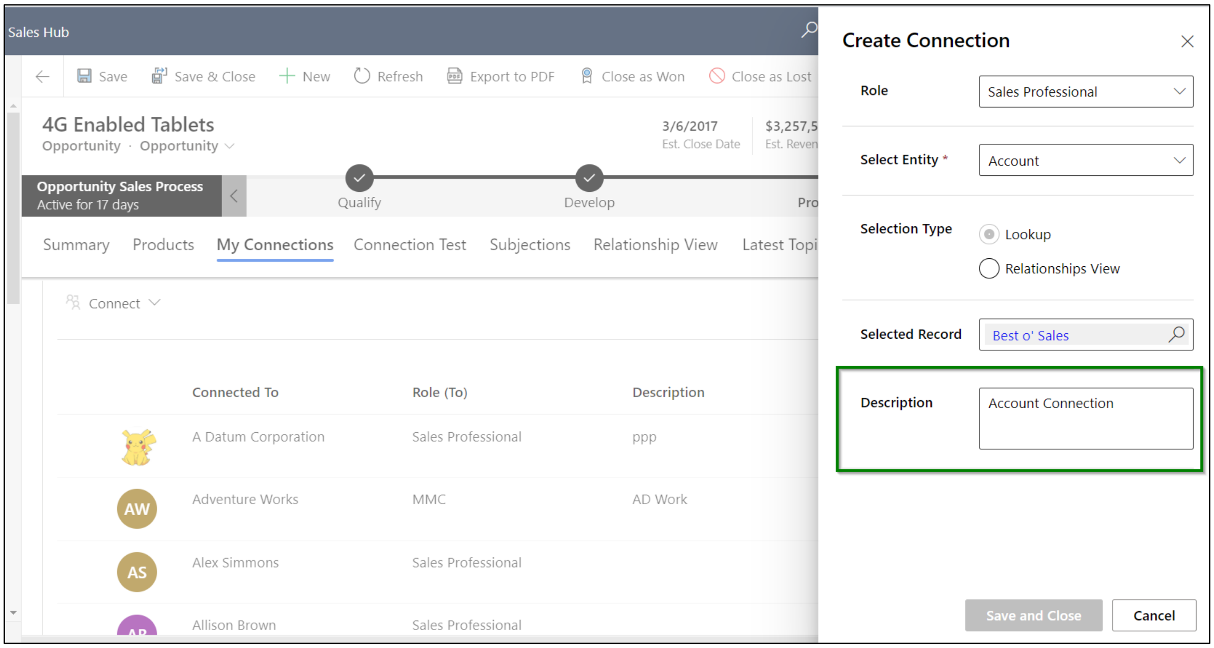
7) Search for a record that you want to make a connection with and click on **'Add'**.



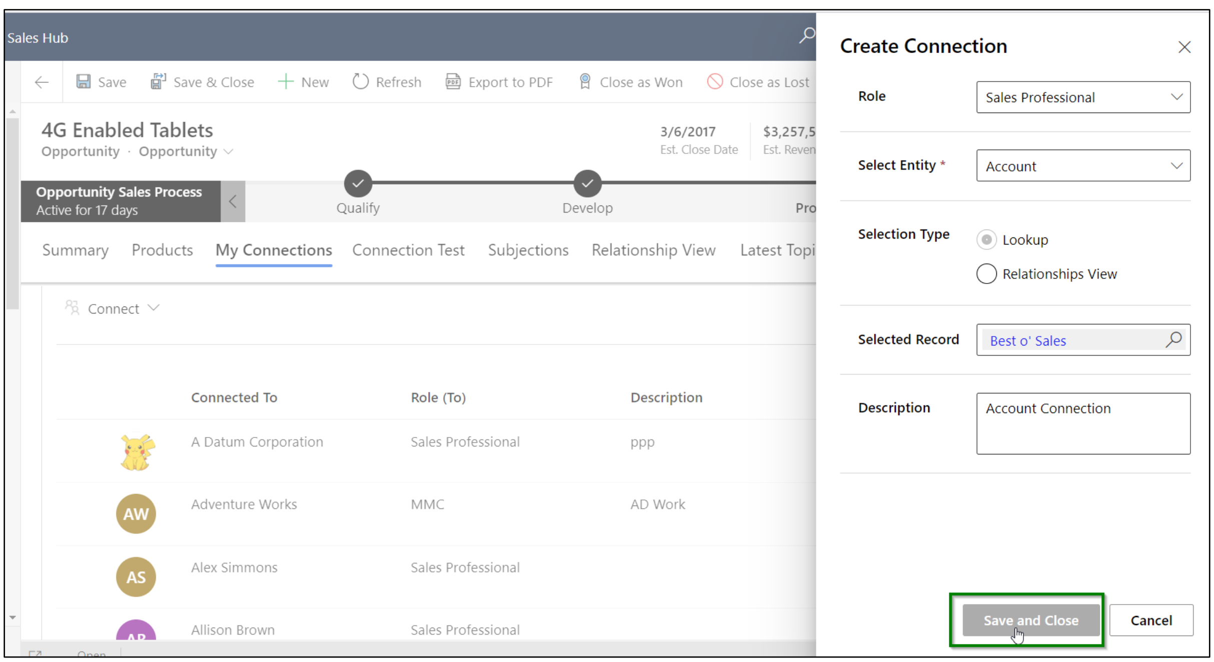
8) This will set the record to the field.



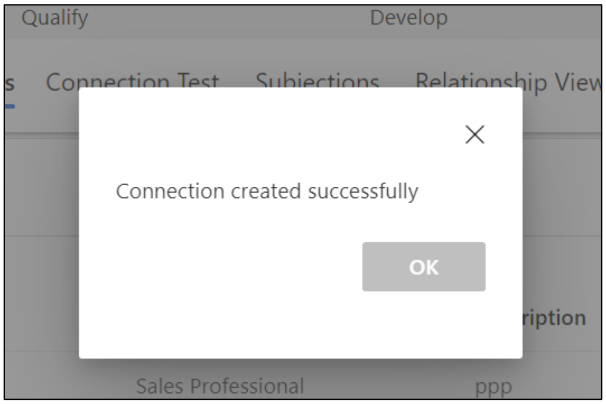
9) You can add description if required.



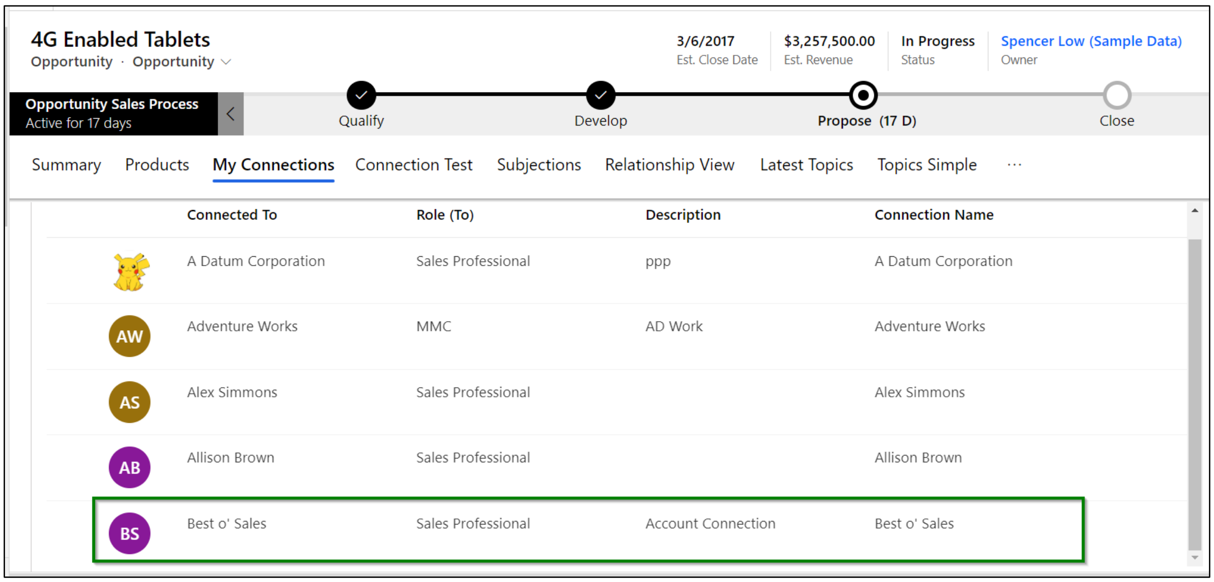
10) Click on **'Save and Close'**.

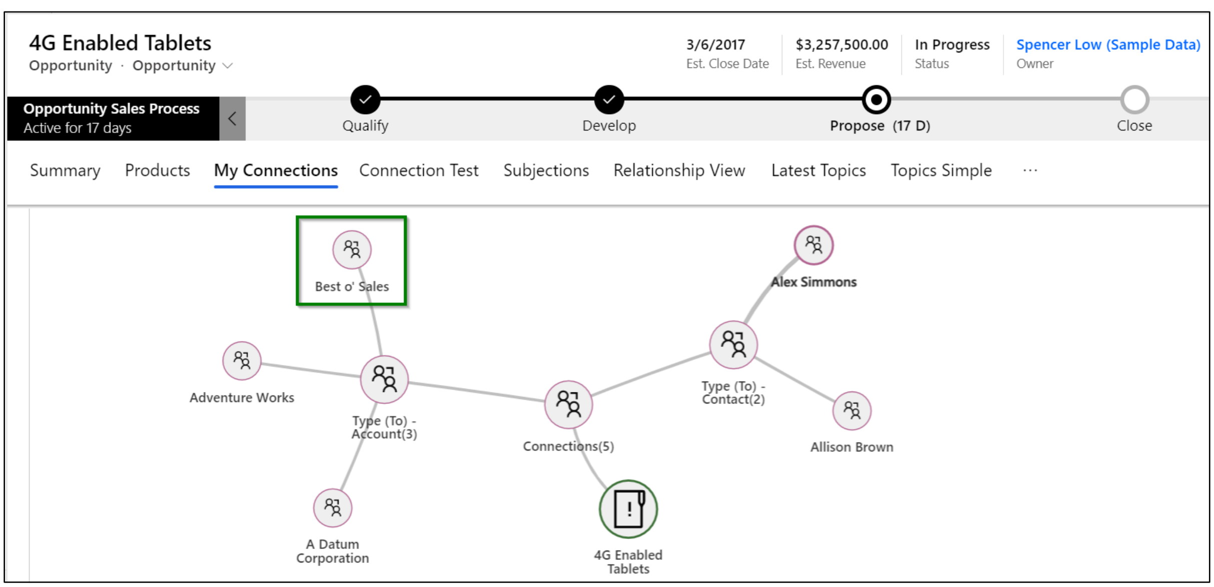


11) You will see the below success pop-up once the connection is added.

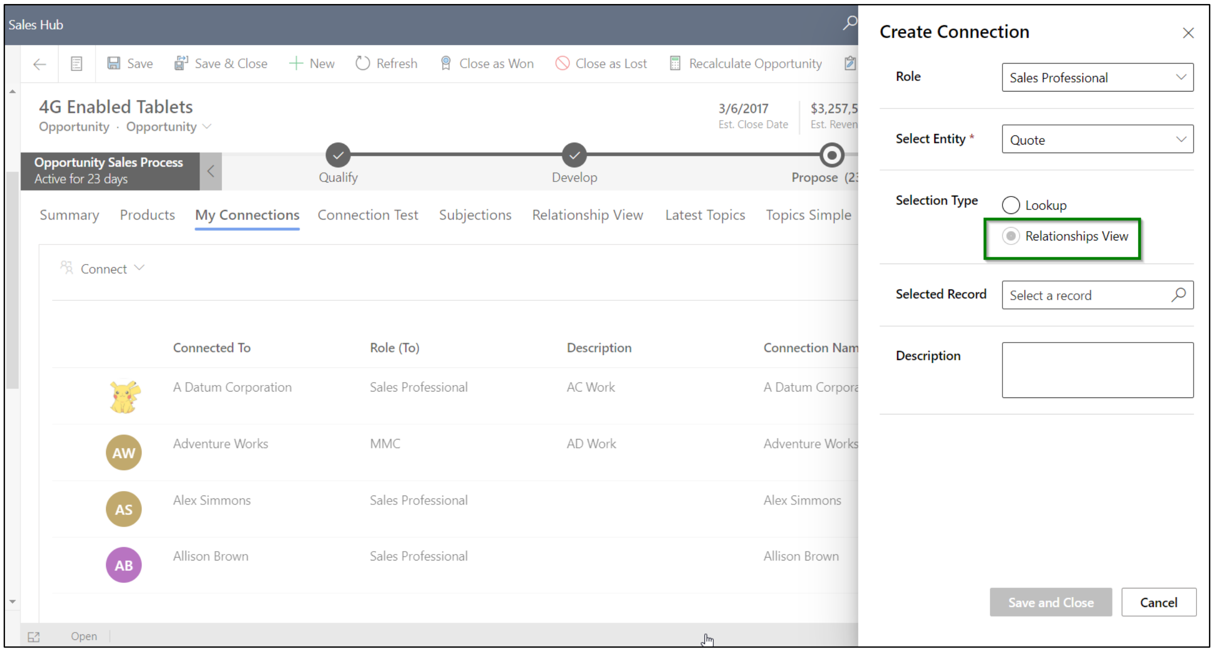


12) Click **'OK'** and the newly added connection will start showing up in both grid and the relationship view.

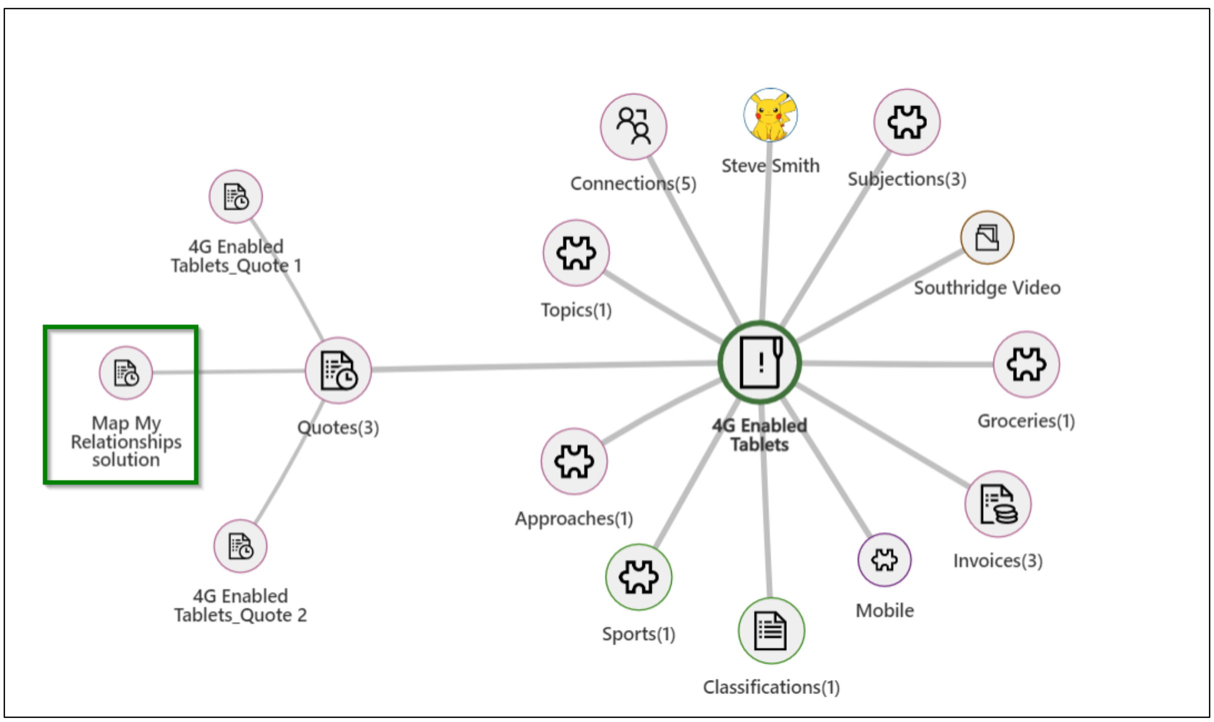




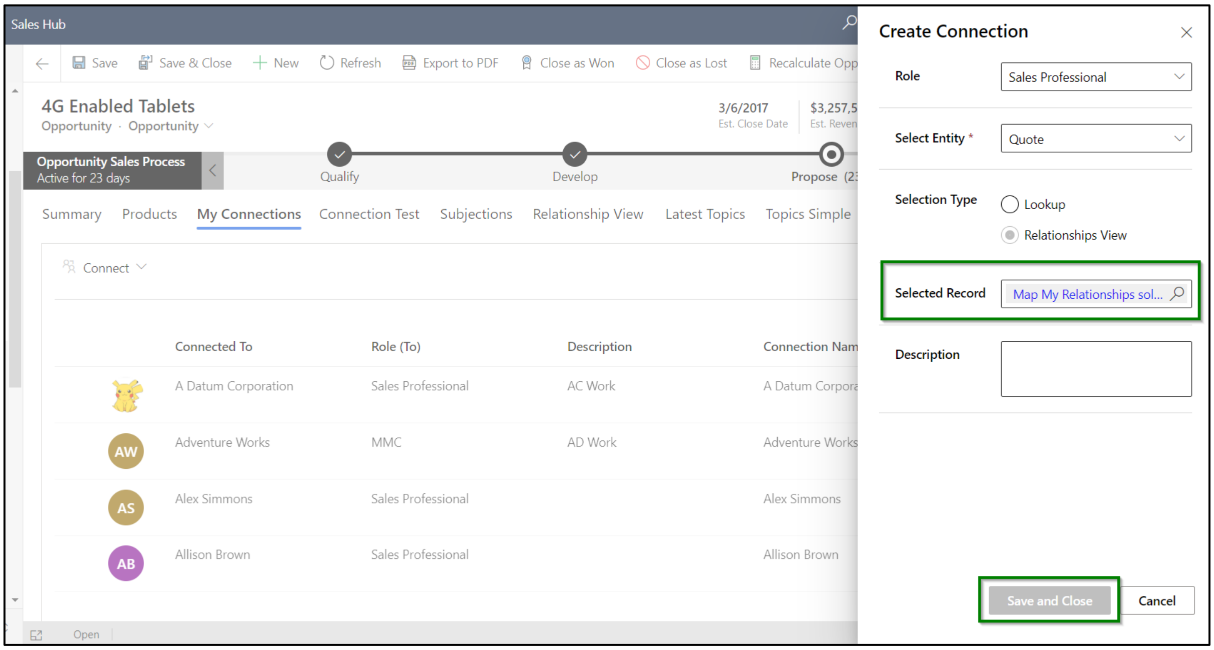
How to add a connection using relationship view?

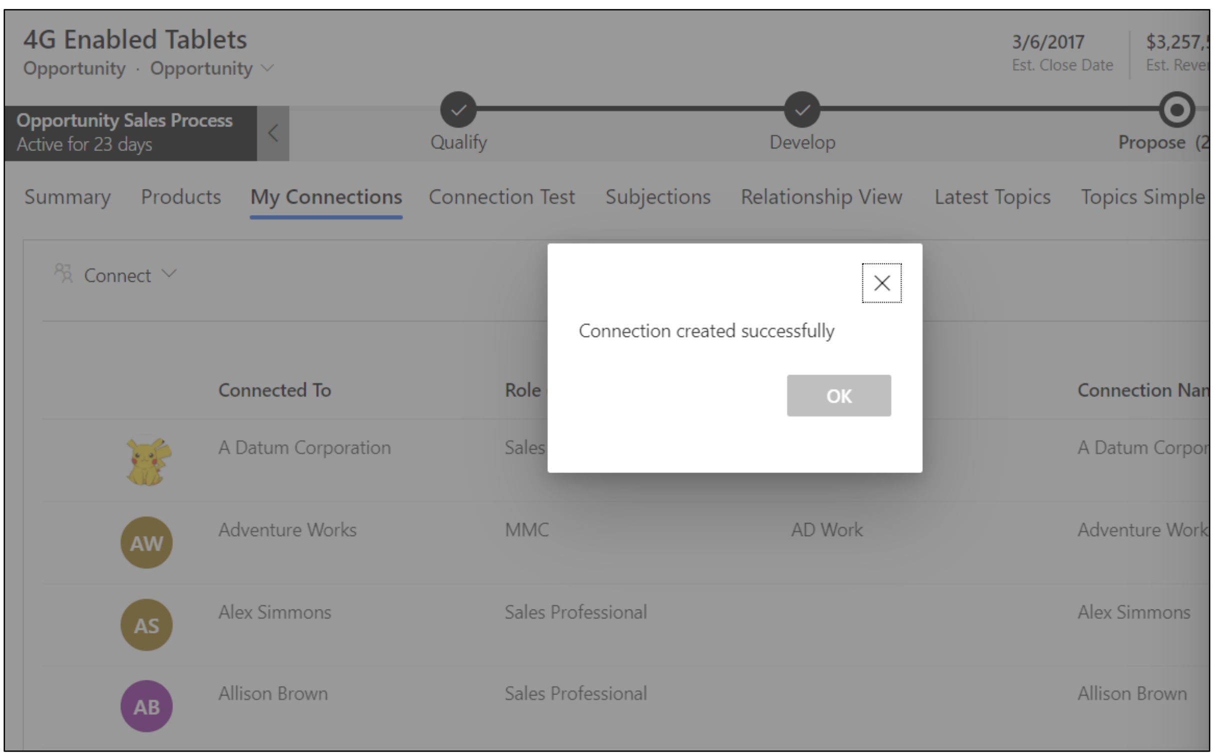


a) Select a quote record through the relationship view.

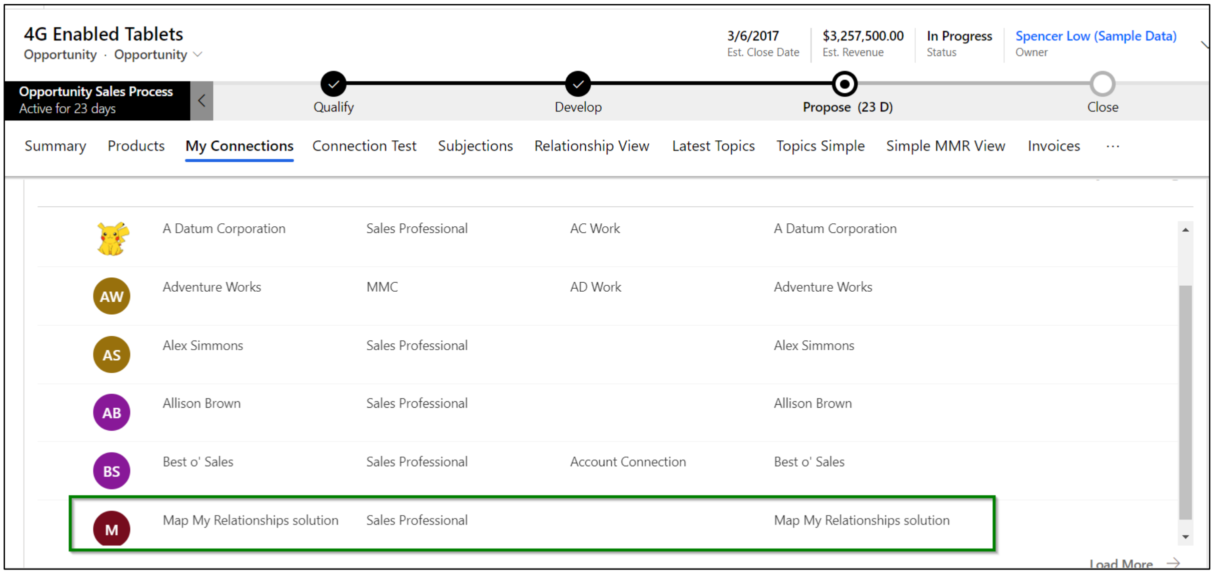


b) Proceed to **'Save and Close'**.

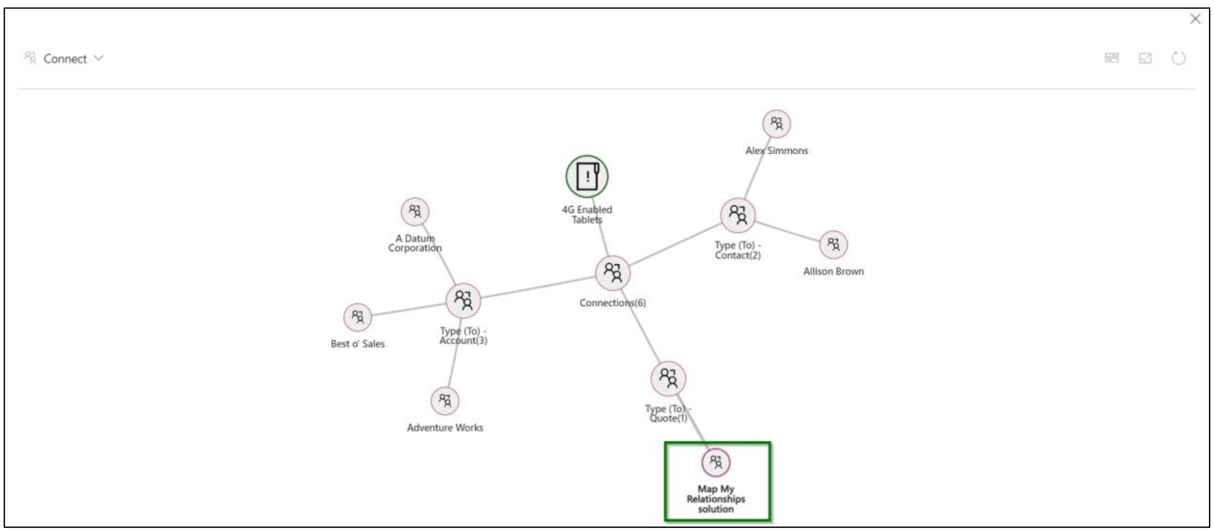




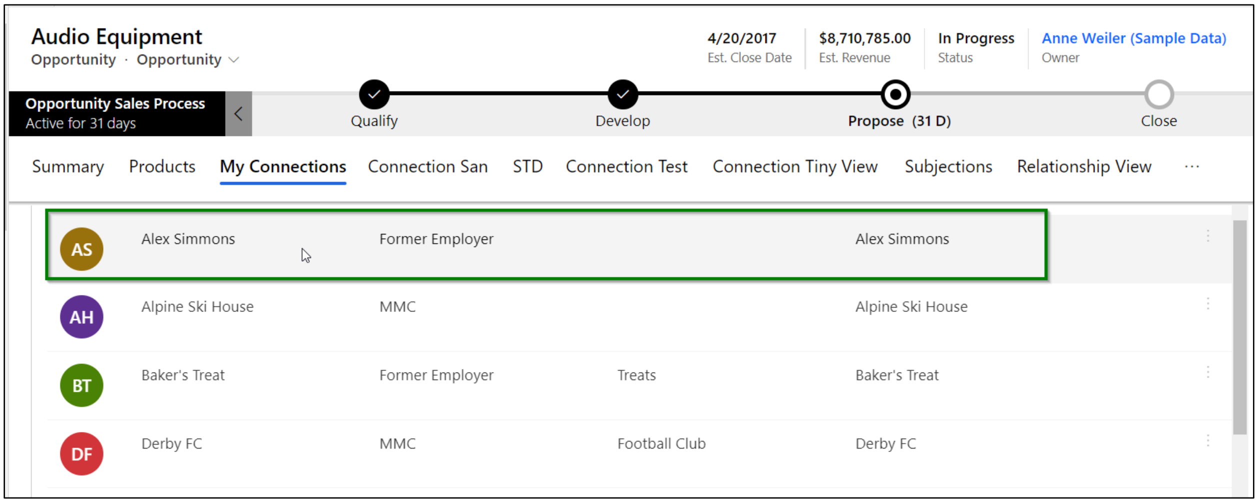
c) Check for the newly created connection, it will appear in the grid.



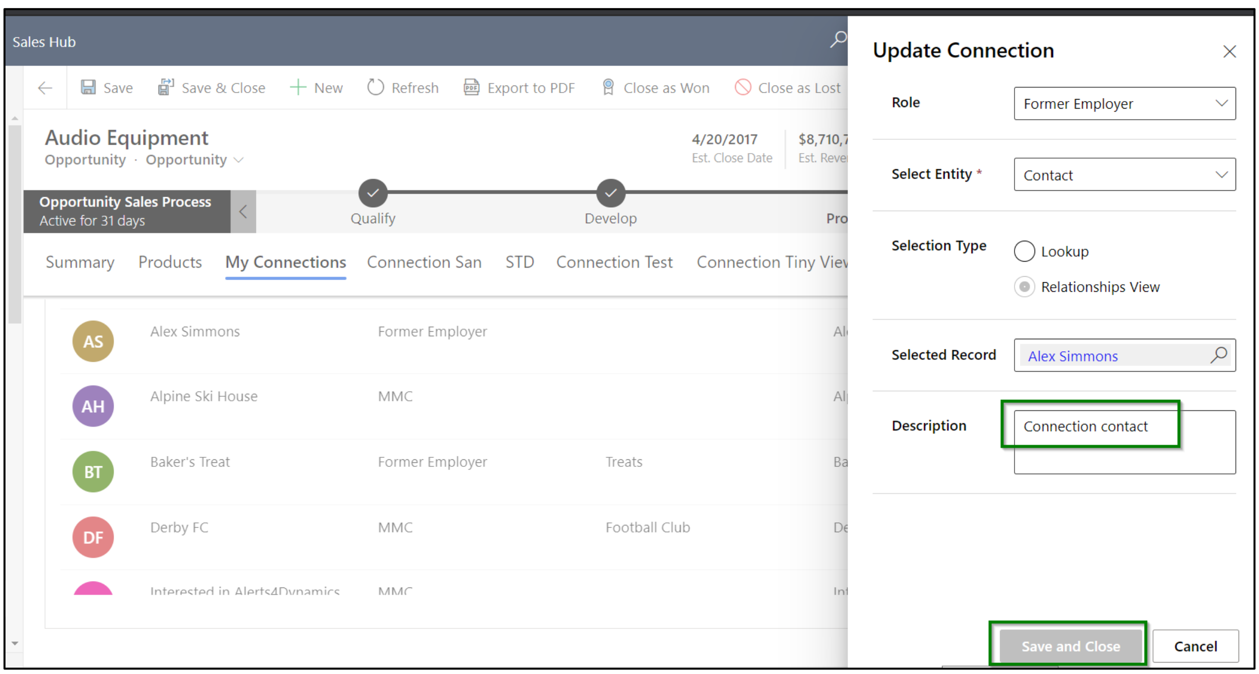
As well as in the relationship view of connections:



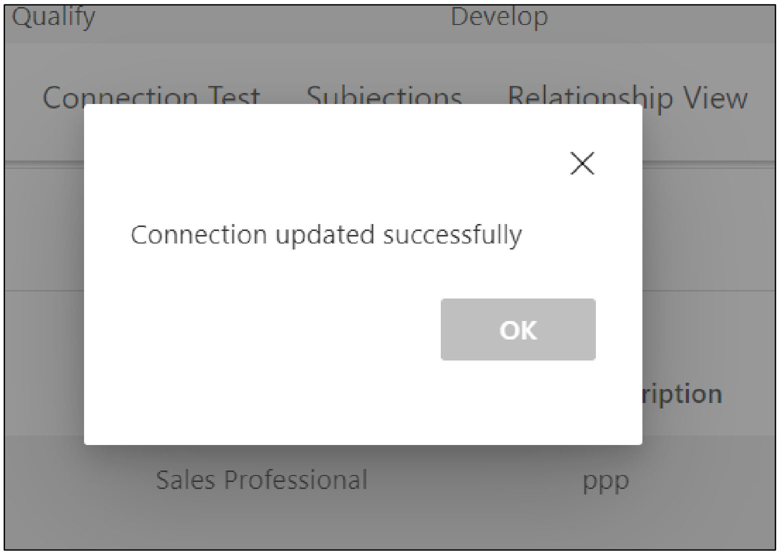
13) This is not where it ends, user is also given a provision to update the connection record. Double click on the connection record that you would like to update.



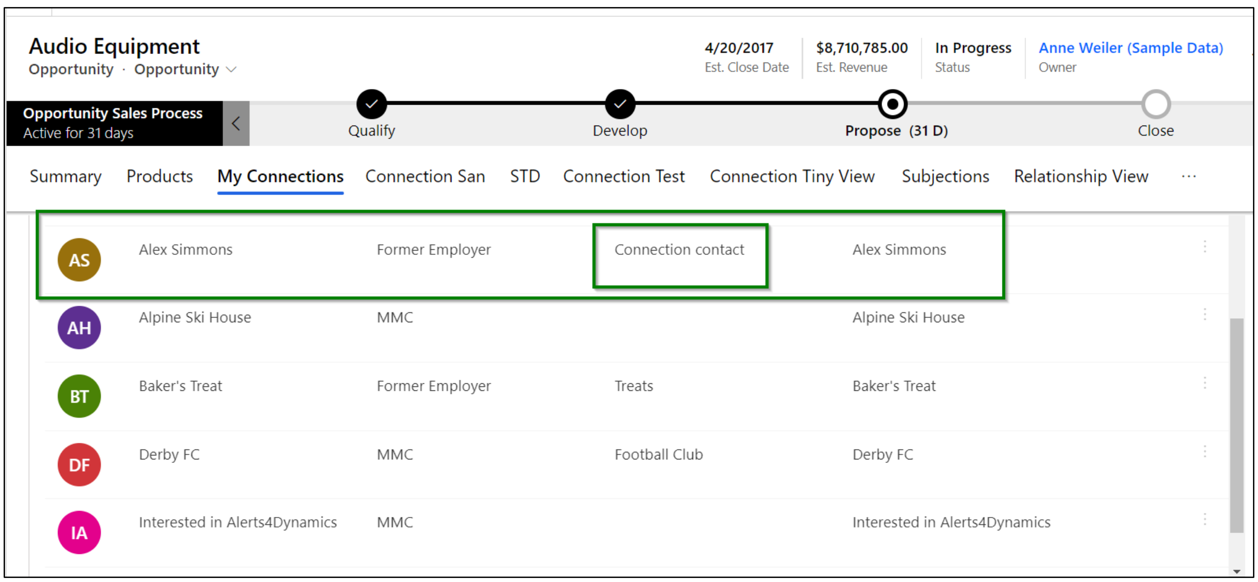
14) Here, we will update the description from blank to something relevant (user can update any of the fields based on the requirement). Click on **'Save and Close'**.



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

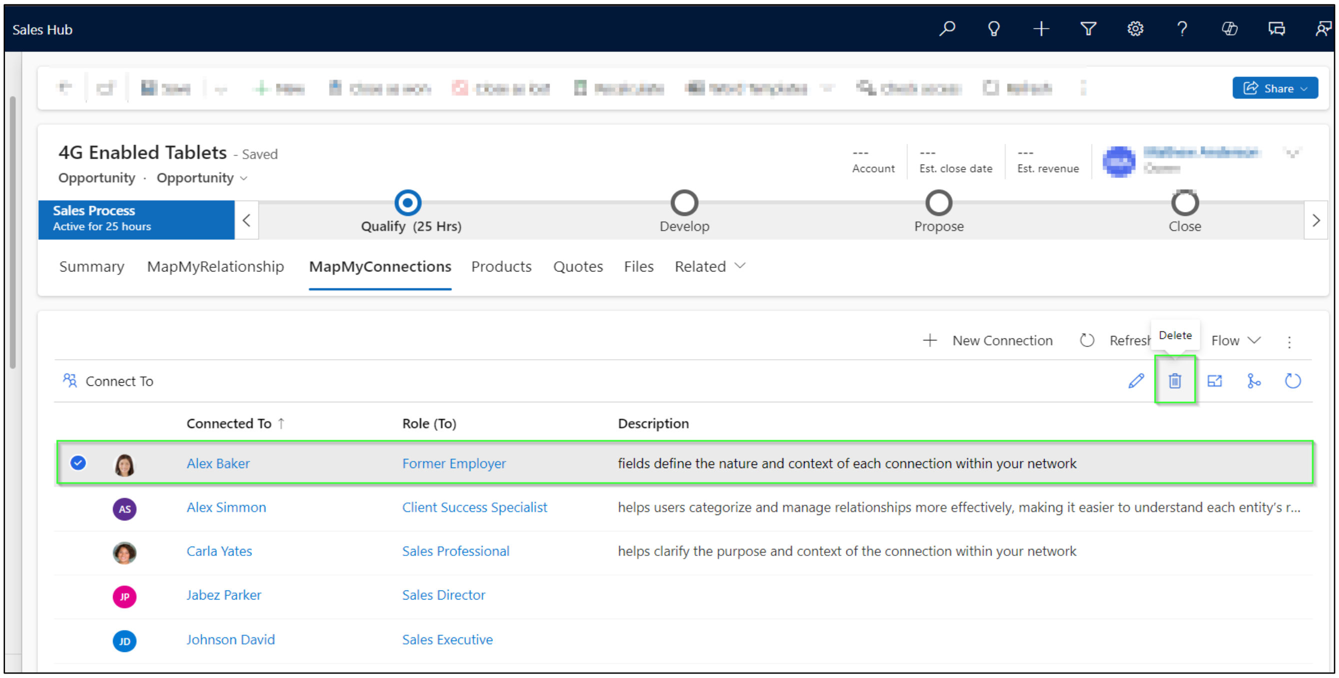


16) Updates will reflect into the record.

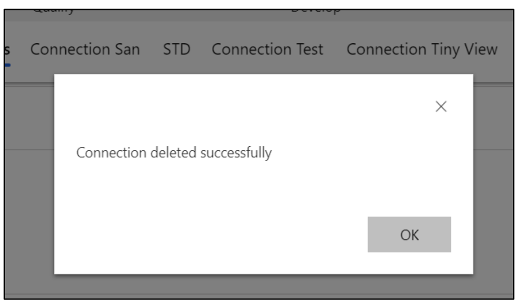


Along with create and update, user can also delete the connection record.

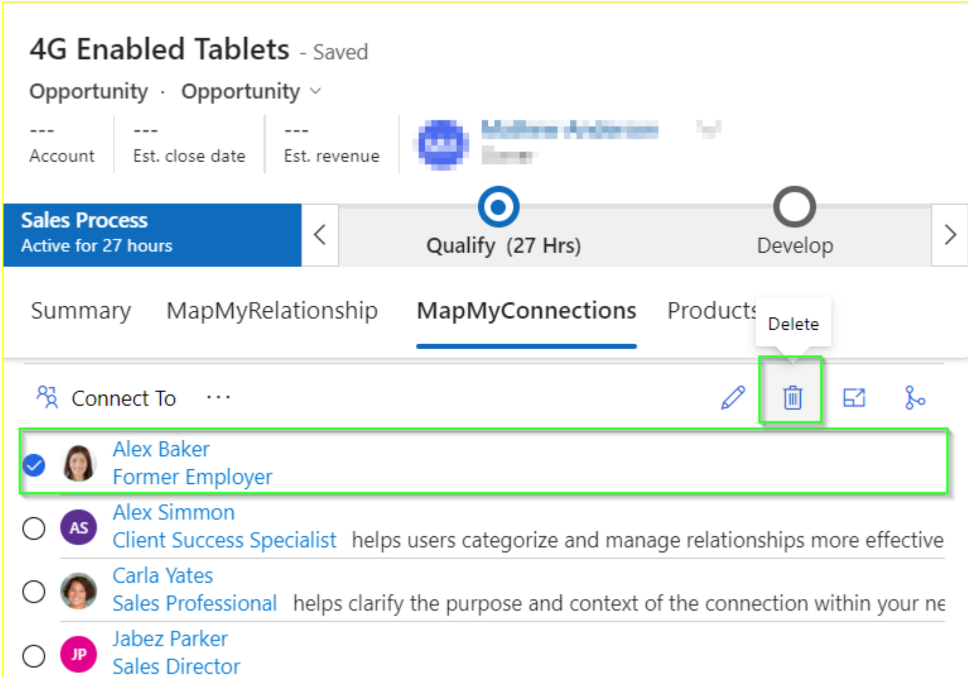
Deleting from **larger** connection control –



Connection record is deleted successfully.



Deleting from **smaller card** view –



Connection record is deleted successfully.

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

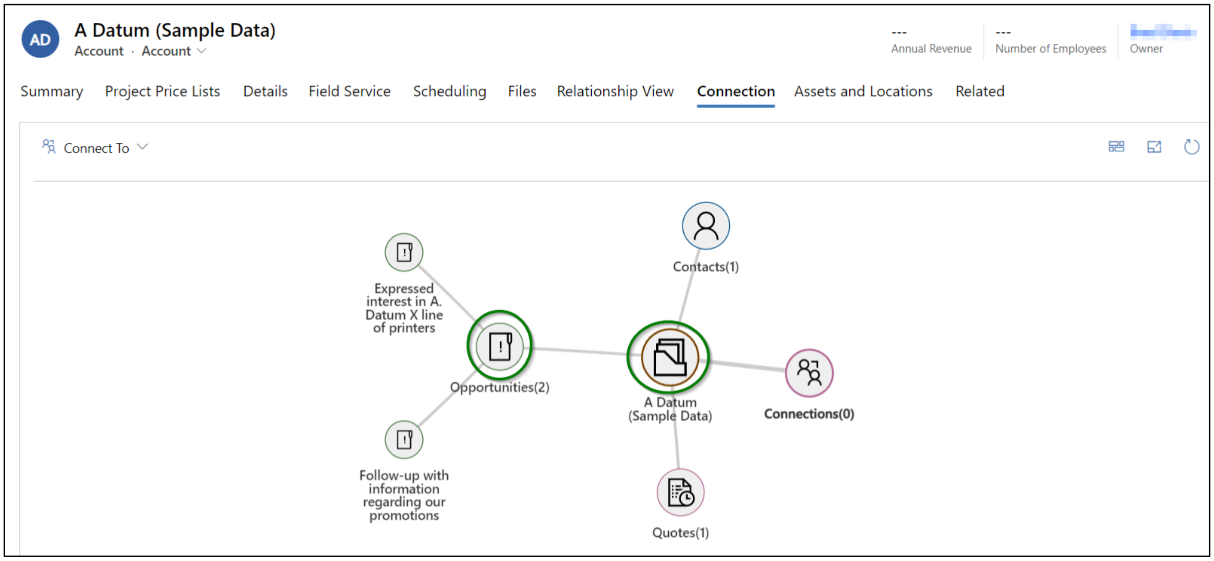
Create Connections within Relationship View

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

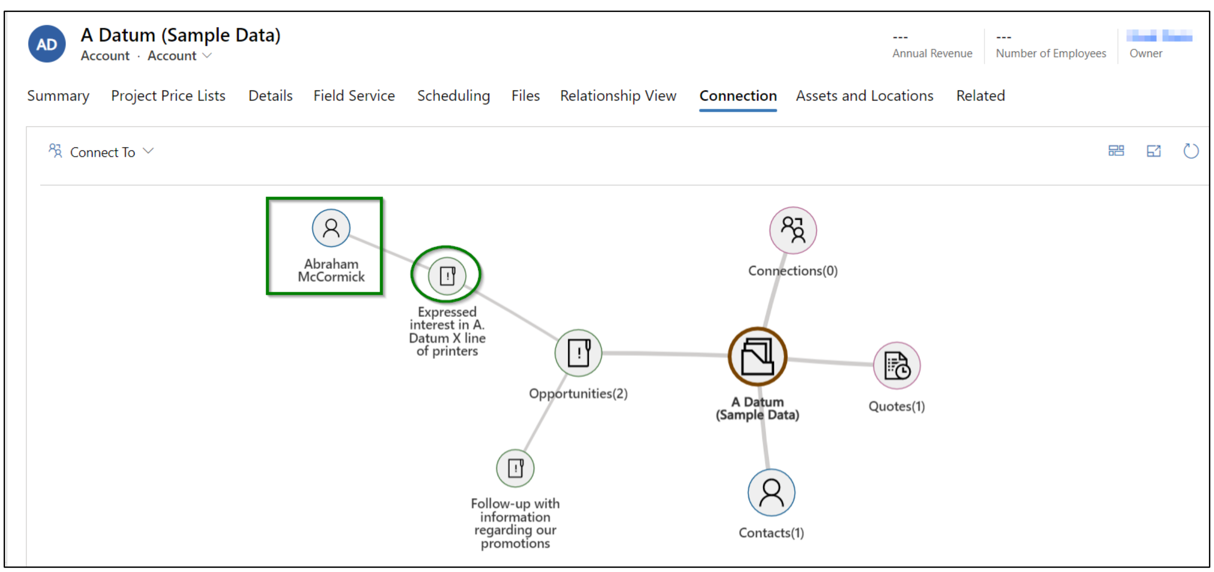
This is explained in detail in the below scenario.

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

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



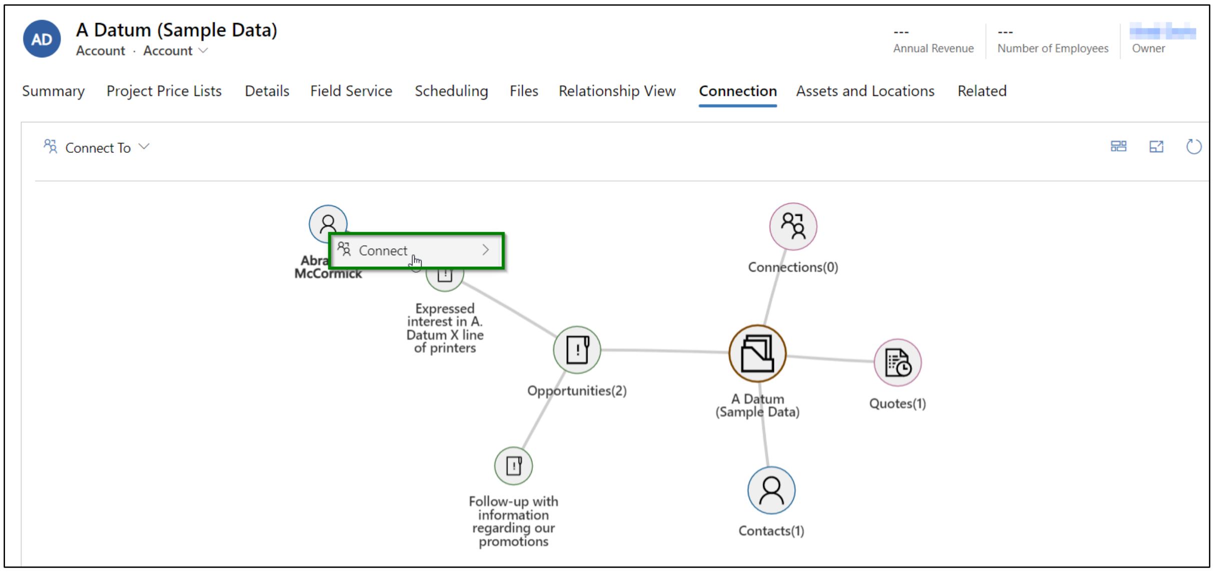
By double clicking on **'Expressed interest in A. Datum X line of printers'**, it will further expand and display its contact as shown below. (Here, we are drilling down through the opportunity record to reach its contact to connect to the main account record **'A Datum (Sample Data)'**).



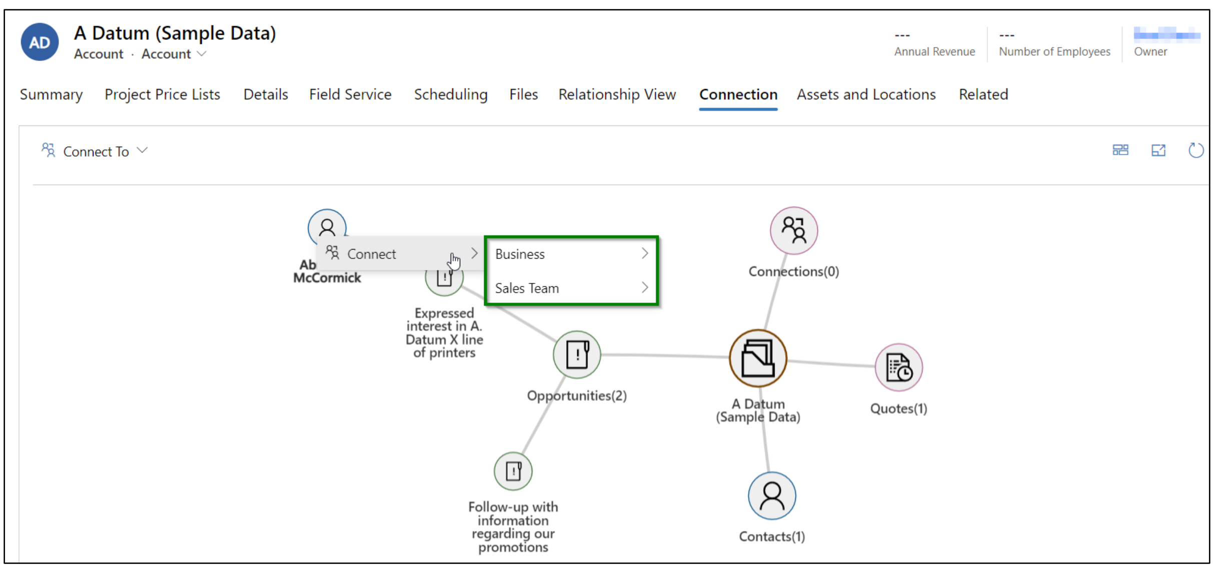
Suppose the user wants to connect this **'Abraham McCormick'** contact to **'A Datum (Sample Data)'** main account record.

For this, follow the steps given below:

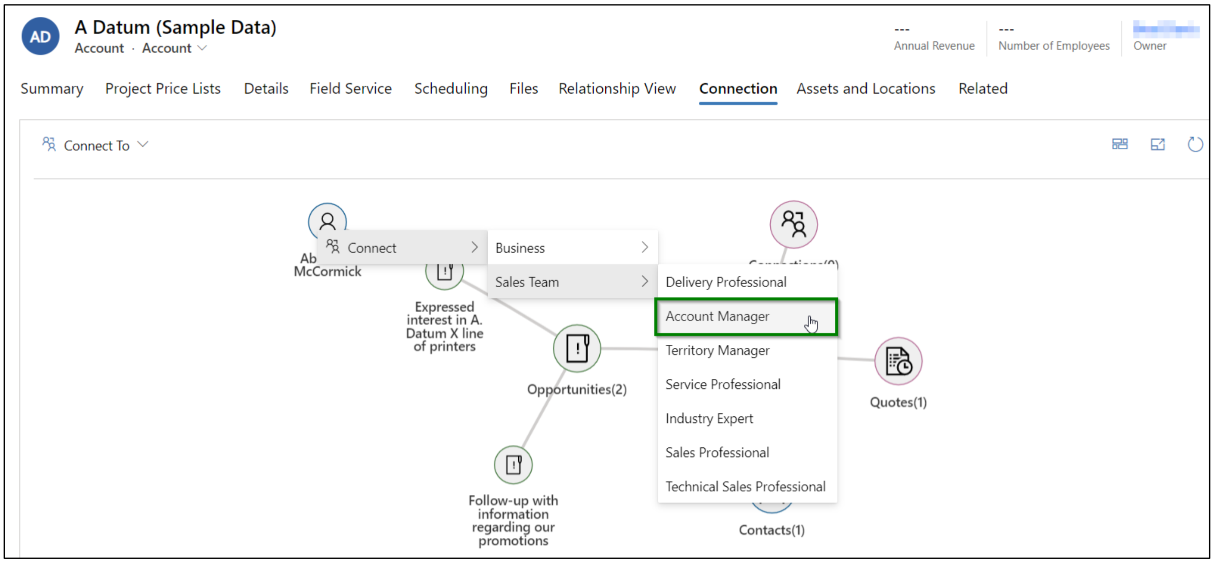
1) First, right click on **'Abraham McCormick'** and click on **'Connect'** option.



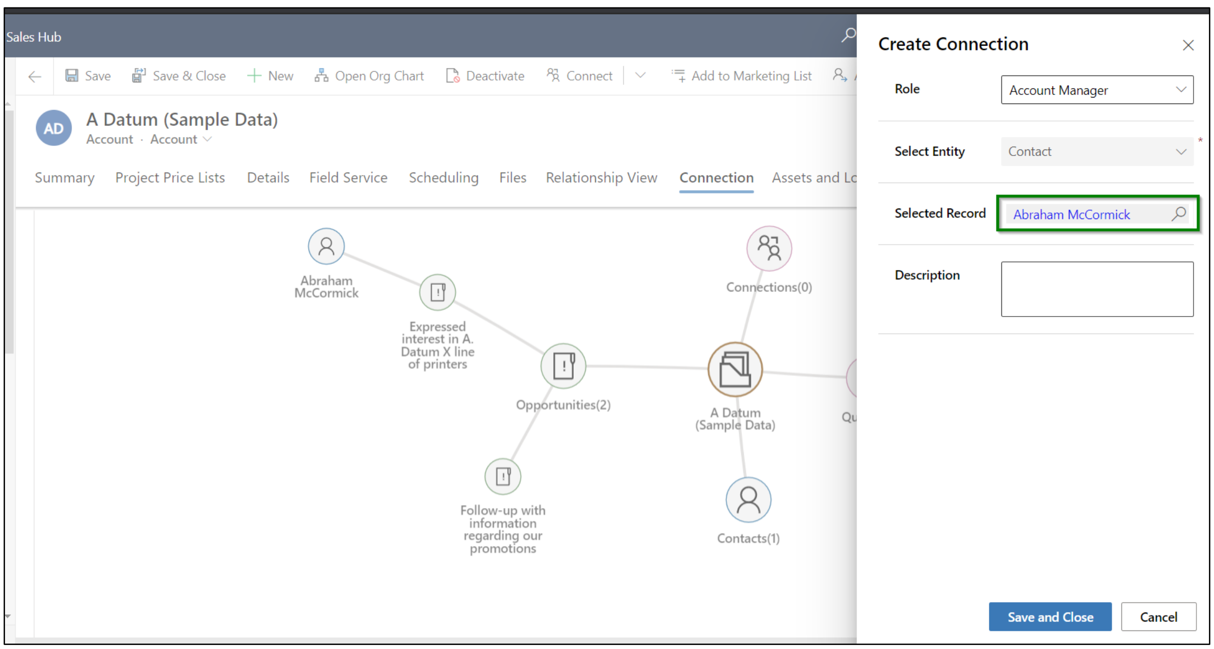
2) Select the role category that you would like to create a connection with to account. (Here, it will populate the list of all those role categories that are enabled on the connection control for creating connections).



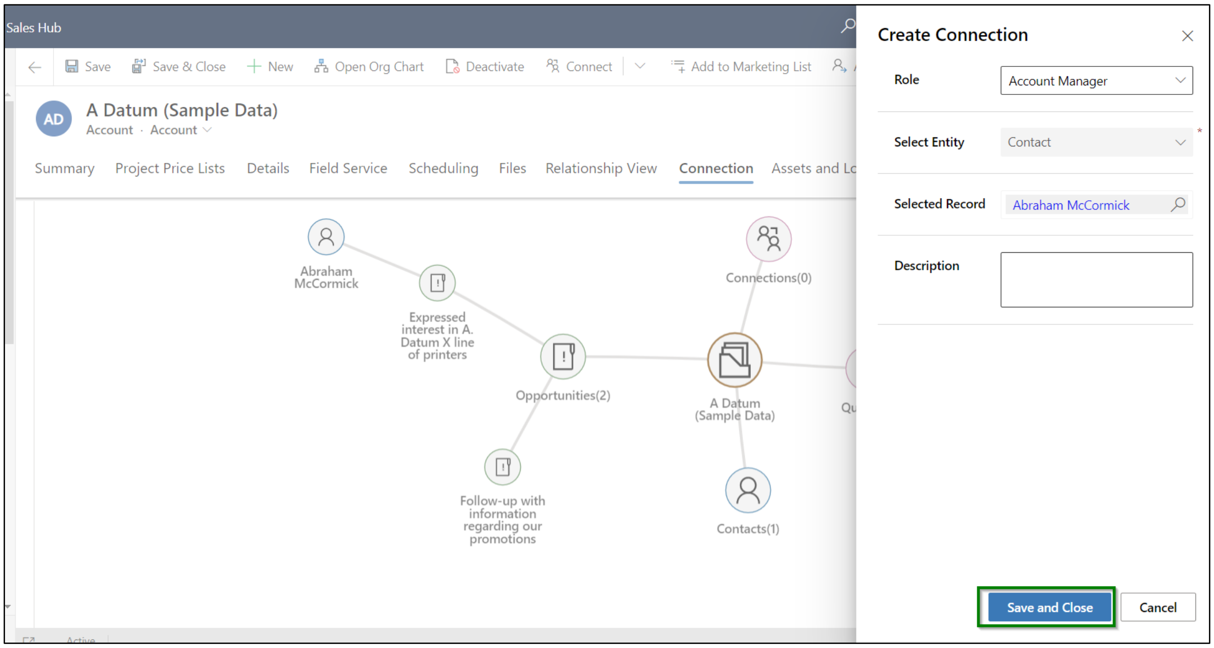
3) Pick a category and choose one of the roles under it.



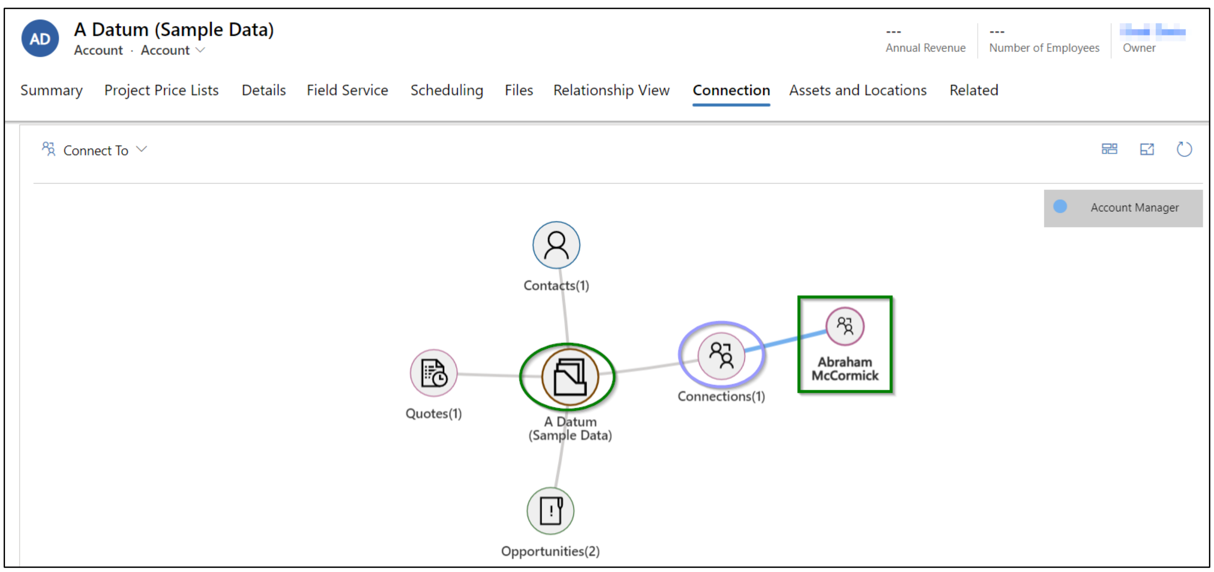
4) Once connection role is selected, **'Create Connection'** form will open up with contact record set to the field **'Selected Record'**.



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



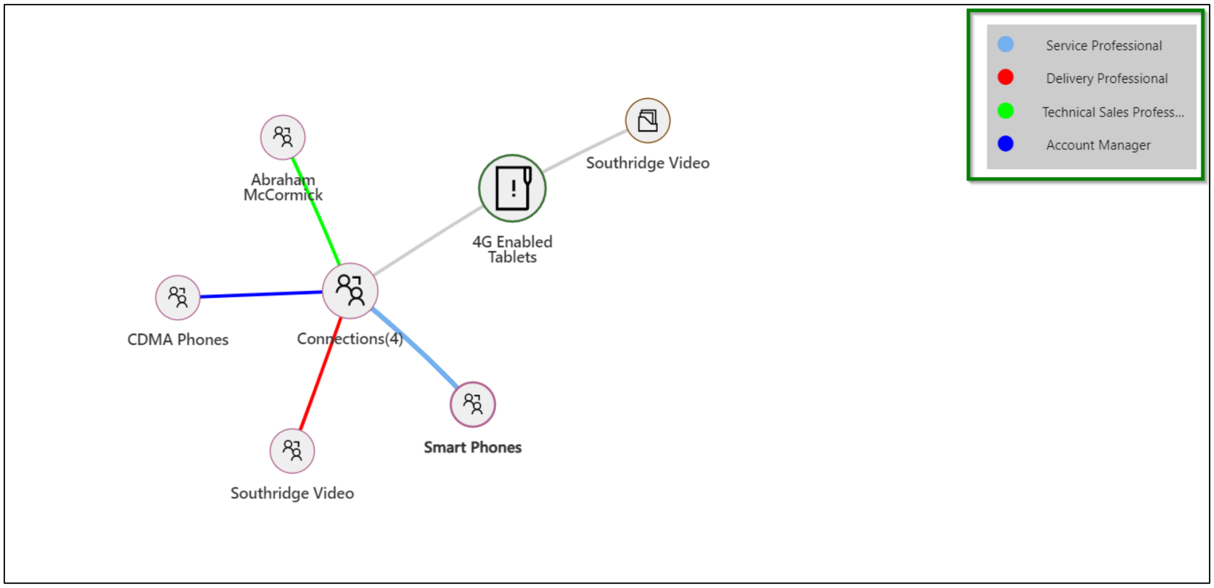
6) The connection is now successfully created and it will start appearing under **'Connections'** of **'A Datum (Sample Data)'** account record.



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

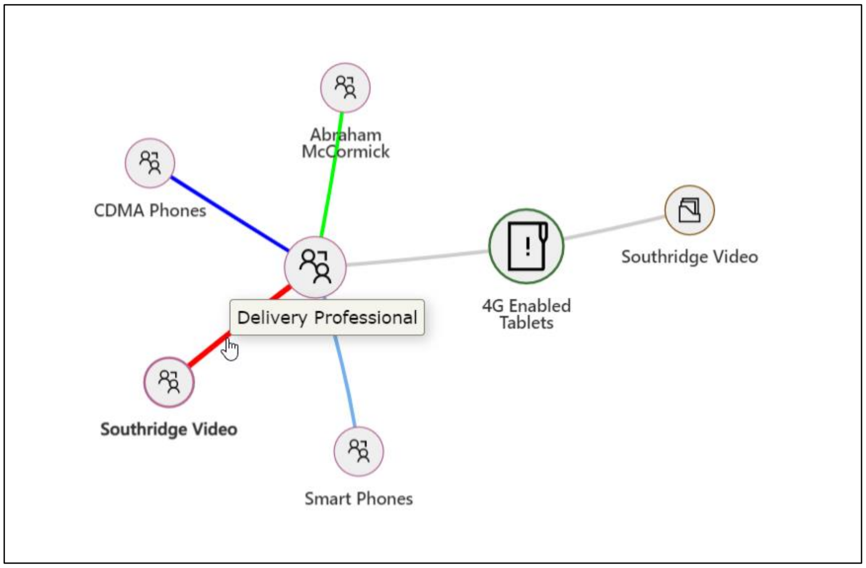
Colour legends in connection relationship view

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



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

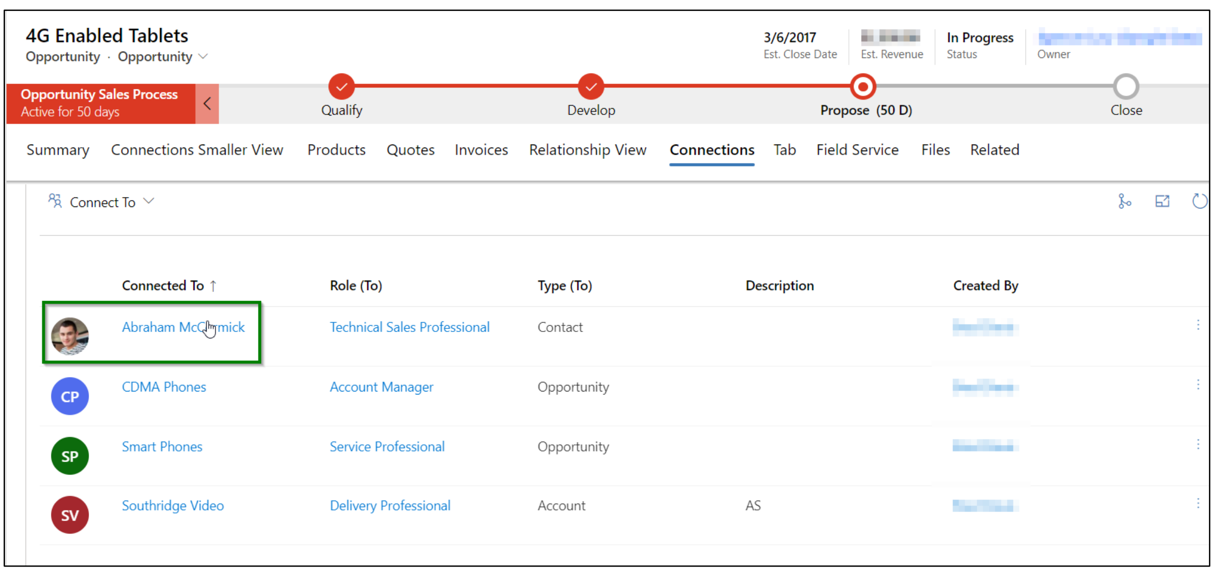
This connection role is also visible to user by hovering over the edges as shown below;



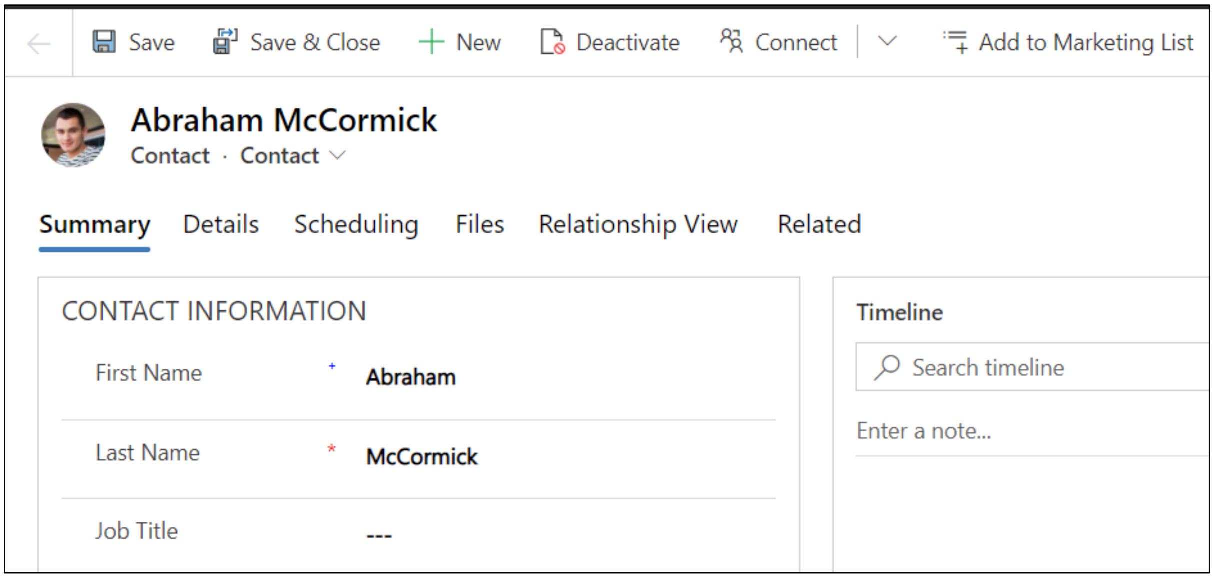
In addition to all of the above, user has also been given a provision to navigate to the actual connection record (may it be of any entity) by clicking on the record hyperlink

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.



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



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

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