

# Map My Relationships

# in@logic

User Manual

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## Introduction

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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.

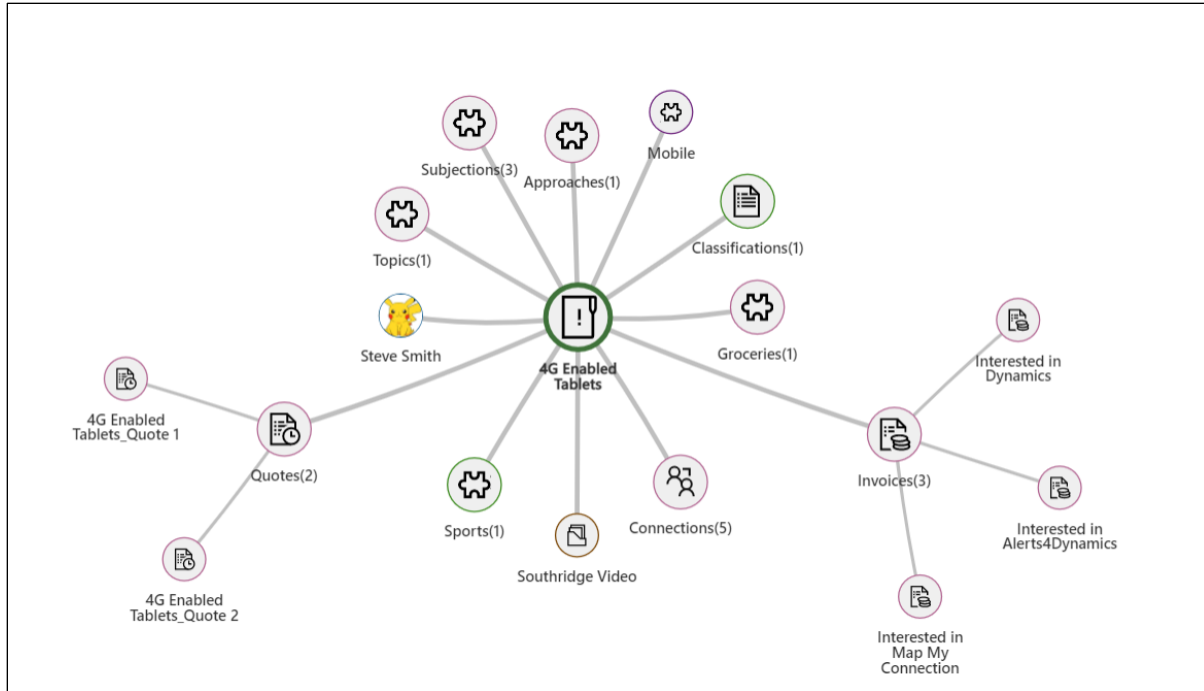
**Available for:** Microsoft Dynamics 365 CRM 9.1 & above, Dataverse (Power Apps)

**Deployment:** Online

## Relationship and Connection Controls

***Map My Relationships:***

## Map My Relationships – User Manual



### Map My Connections – Larger Grid:

**4G Enabled Tablets**  
Opportunity · Opportunity ▾

3/6/2017  
Est. Close Date

\$3,257,500.00  
Est. Revenue

In Progress  
Status

[Spencer Low \(Sample Data\)](#)  
Owner

**Opportunity Sales Process**  
Active for 31 days

Qualify

Develop

Propose (31 D)

Close

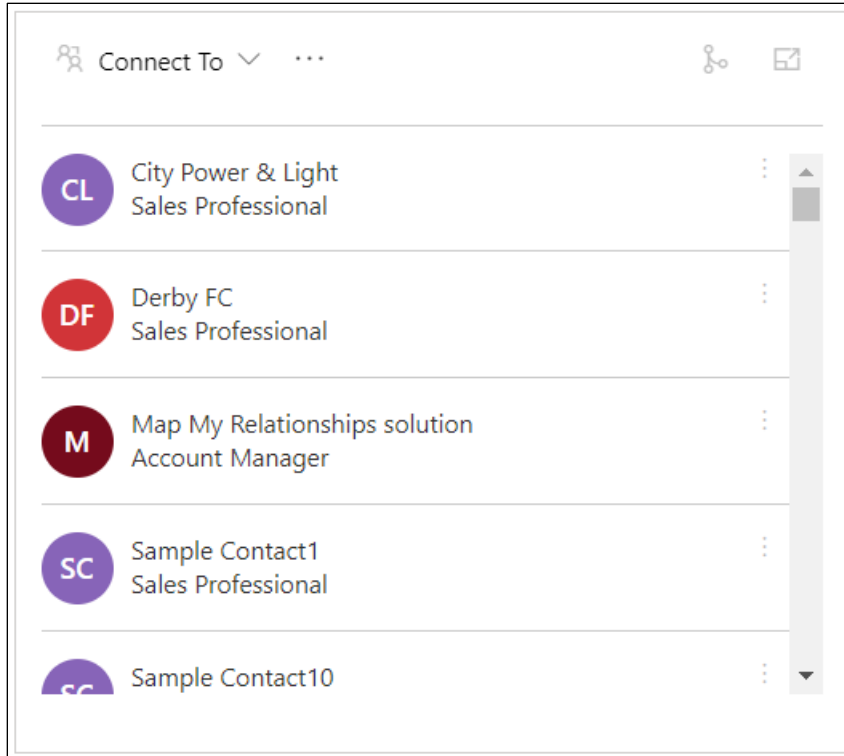
Summary Products My Connections Connection San STD Connection Test Connection Tiny View Subjections Relationship View ...

Connect To ▾

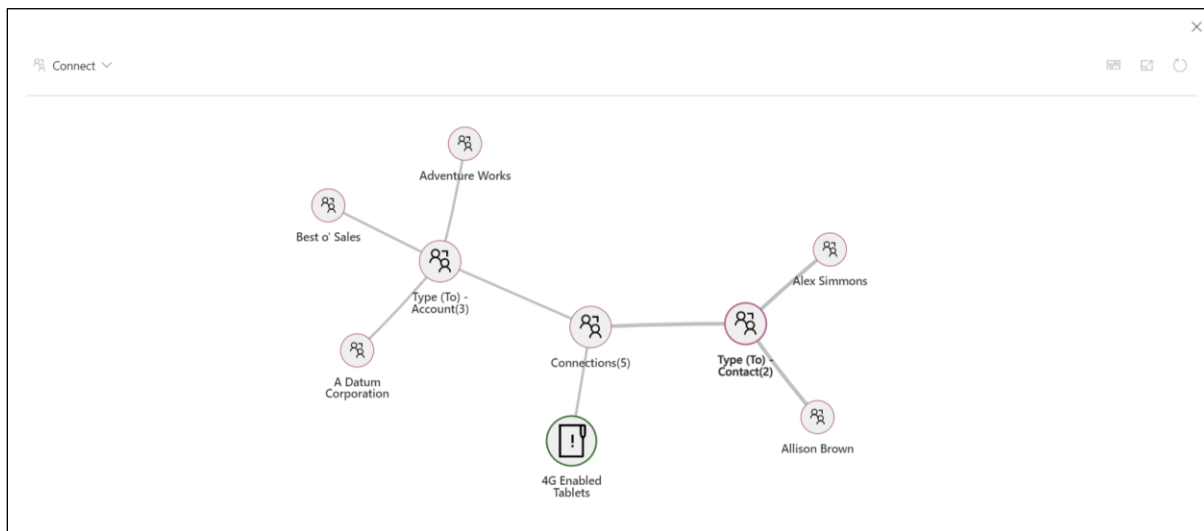
Connected To ↑	Role (To)	Description	Connection Name
<span style="background-color: #8e8e8e; border-radius: 50%; padding: 2px;">AE</span> Adventure Works Electronics	Sales Professional		Adventure Works Electronics
<span style="background-color: #8e8e8e; border-radius: 50%; padding: 2px;">CL</span> City Power & Light	Sales Professional		City Power & Light
<span style="background-color: #8e8e8e; border-radius: 50%; padding: 2px;">DF</span> Derby FC	Sales Professional		Derby FC
<span style="background-color: #8e8e8e; border-radius: 50%; padding: 2px;">M</span> Map My Relationships solution	Account Manager		Map My Relationships solution

### Map My Connections – Smaller cards:

## Map My Relationships – User Manual



### **Map My Connections – Relationship view:**



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

## Map My Relationships – User Manual

Customer Stakeholders	Sales Team	Connected Accounts
<b>BK</b> Benno Kurmann Stakeholder info@fineartschool.net	<b>BJ</b> Barry John Industry Expert Barry@DecDevCorp.onmicrosoft.c	<b>AH</b> Alpine Ski House Employer Cathan@alpineskihouse.com
<b>RP</b> Rok Palčič Stakeholder Rok@northwindtraders.com	<b>GC</b> Gaurav Chatterjee Delivery Professional Gaurav@DecDevCorp.onmic	<b>BA</b> Blue Yonder Airlines Employer brian@blueyonderairlines.com
	<b>LL</b> Larry Lane Territory Manager Larry@DecDevCorp.onmicrosof	<b>CL</b> City Power & Light Employer walter@cpandl.com
		<b>NT</b> Northwind Traders Partner alexw@northwindtraders.com

## Security Roles

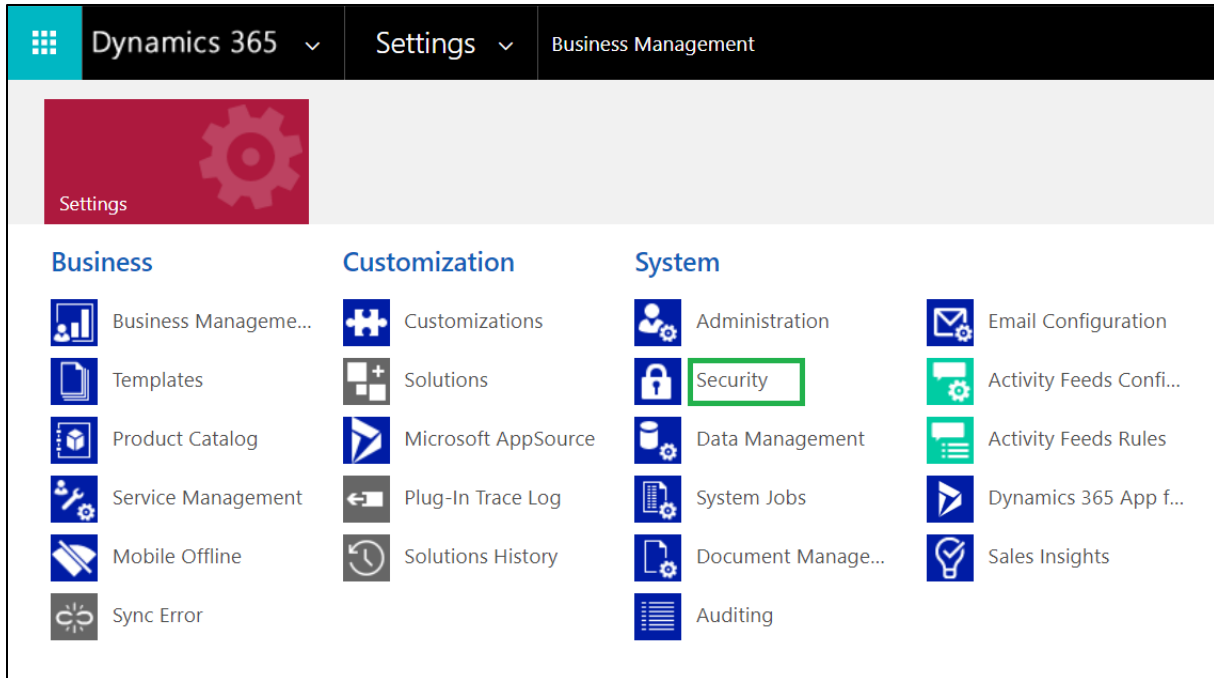
Two security roles, particularly for **Map My Relationships**, come along with the solution.

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

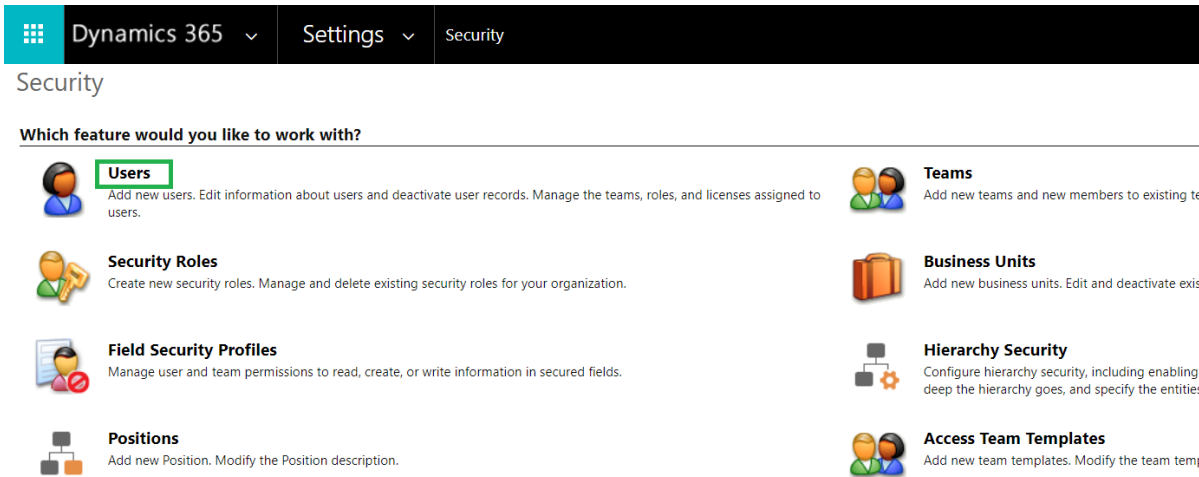
**Note: System Administrator has all the rights that Map My Relationships administrator has.**

Here are the steps to assign security role to users.

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



- Select Users.



- Select user --> Click on MANAGE ROLES.



## Map My Relationships – User Manual

The screenshot shows the Dynamics 365 interface. At the top, there is a navigation bar with 'Dynamics 365', 'Settings', and 'Security'. Below this is a secondary bar with various action buttons: '+ NEW', 'EDIT', 'APPROVE EMAIL', 'REJECT EMAIL', 'PROMOTE TO ADMIN', 'MANAGE ROLES' (highlighted with a green box), 'CHANGE BUSINESS UNIT', and 'CHANGE'. Below the navigation is a section titled 'Enabled Users' with a dropdown arrow. Underneath is a table of users with columns for checkboxes, Full Name, Site, Business Unit, Title, and Position.

<input type="checkbox"/>	Full Name ↑	Site	Business Unit	Title	Position
<input type="checkbox"/>	Harry Buttler		classicpublications		
<input checked="" type="checkbox"/>	James Grey		<a href="#">classicpublications</a>		
<input type="checkbox"/>	Microsoft Forms Pro		classicpublications		
<input type="checkbox"/>	Oliver Sands		classicpublications		
<input type="checkbox"/>	Power Apps Checker Application		classicpublications		
<input type="checkbox"/>	Power Platform Dataflows Common Data Service...		classicpublications		

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

The screenshot shows a dialog box titled 'Manage User Roles' with a close button (X) in the top right corner. The main text asks: 'What roles would you like to apply to the 1 User you have selected?'. Below this is a table with columns for 'Role Name' and 'Business Unit'. The 'Map My Relationships User' role is selected with a checked checkbox. At the bottom, there is an information icon and a paragraph of text, followed by 'OK' and 'Cancel' buttons.

Role Name	Business Unit
<input type="checkbox"/> Lead Assignment Administrator	classicpublications
<input type="checkbox"/> Lead Assignment User	classicpublications
<input type="checkbox"/> Map My Relationships Administrator	classicpublications
<input checked="" type="checkbox"/> Map My Relationships User	classicpublications
<input type="checkbox"/> Marketing Manager	classicpublications
<input type="checkbox"/> Marketing Professional	classicpublications
<input type="checkbox"/> Omnichannel administrator	classicpublications

**i** 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

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## Map My Relationships Control

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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.

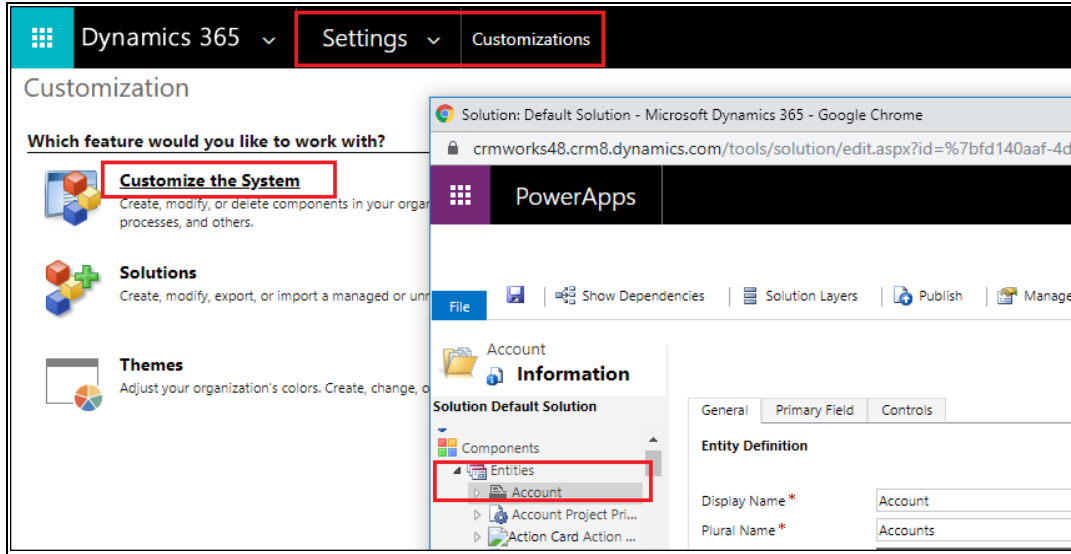
**Add Map My Relationships view on the form:** Decide the entity on which the users would be able to see the related records of that entity. The entity may be a common use entity.

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

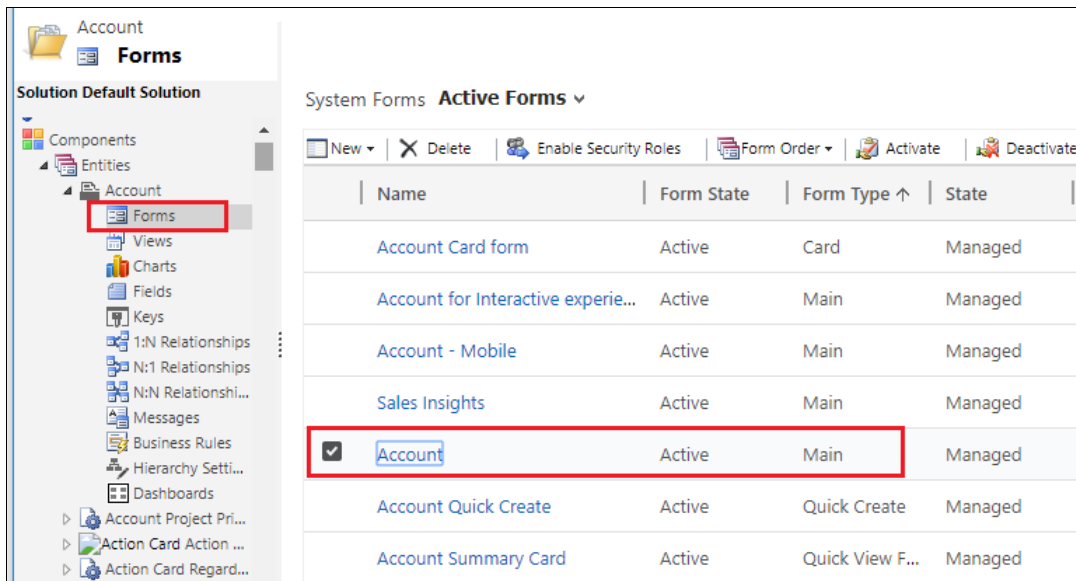
In this document, we will configure the Map My Relationships for the Account entity.

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

## Map My Relationships – User Manual



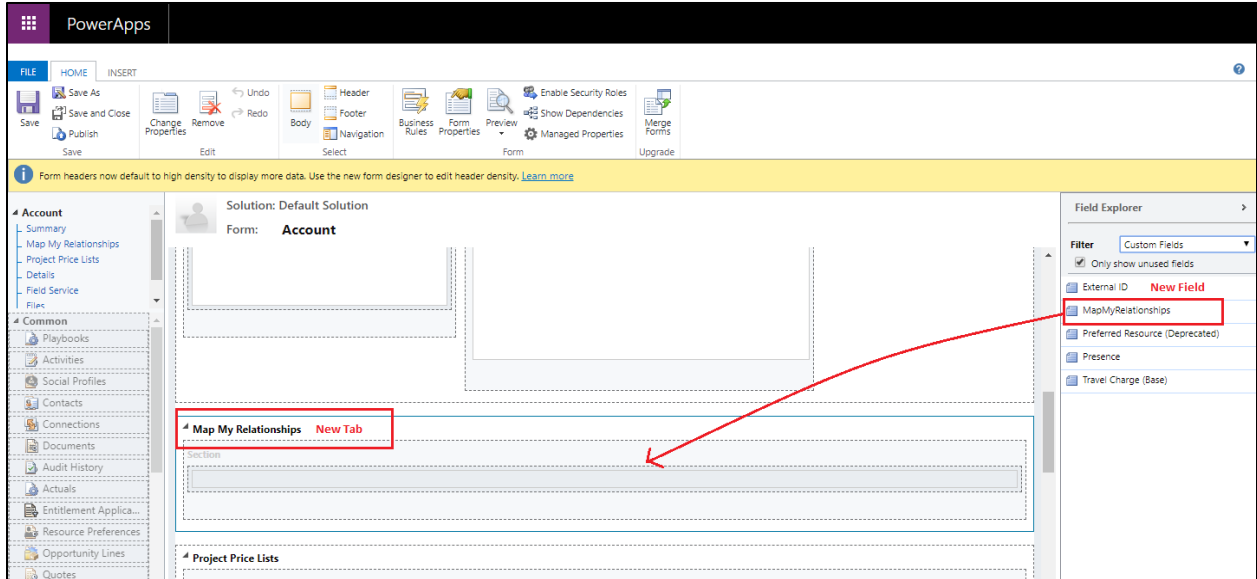
2. Expand the selected entity and open the form on which the Map My Relationships view needs to be added.



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

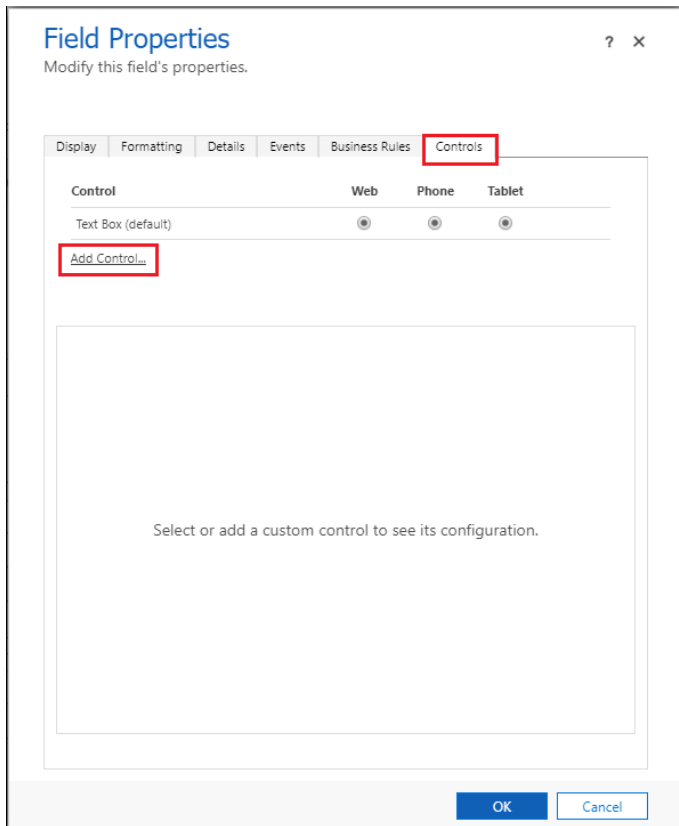
Go to existing tab or a new tab on the form and add newly created custom field in the section.

# Map My Relationships – User Manual

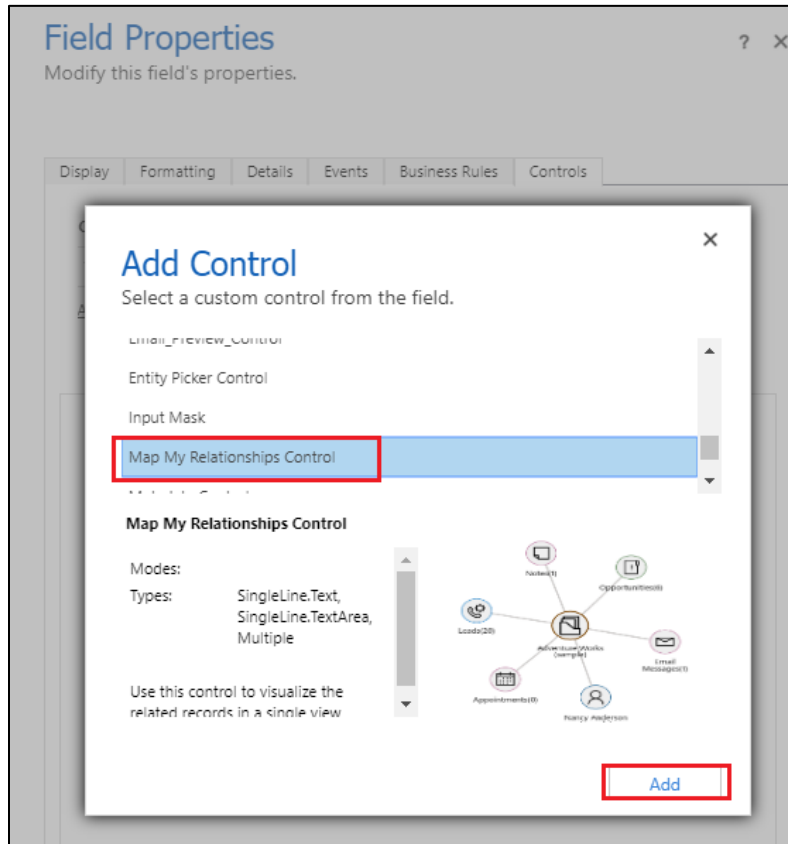


**Note: New field of type text is required to bind Map My Relationships control. The field does not hold any data.**

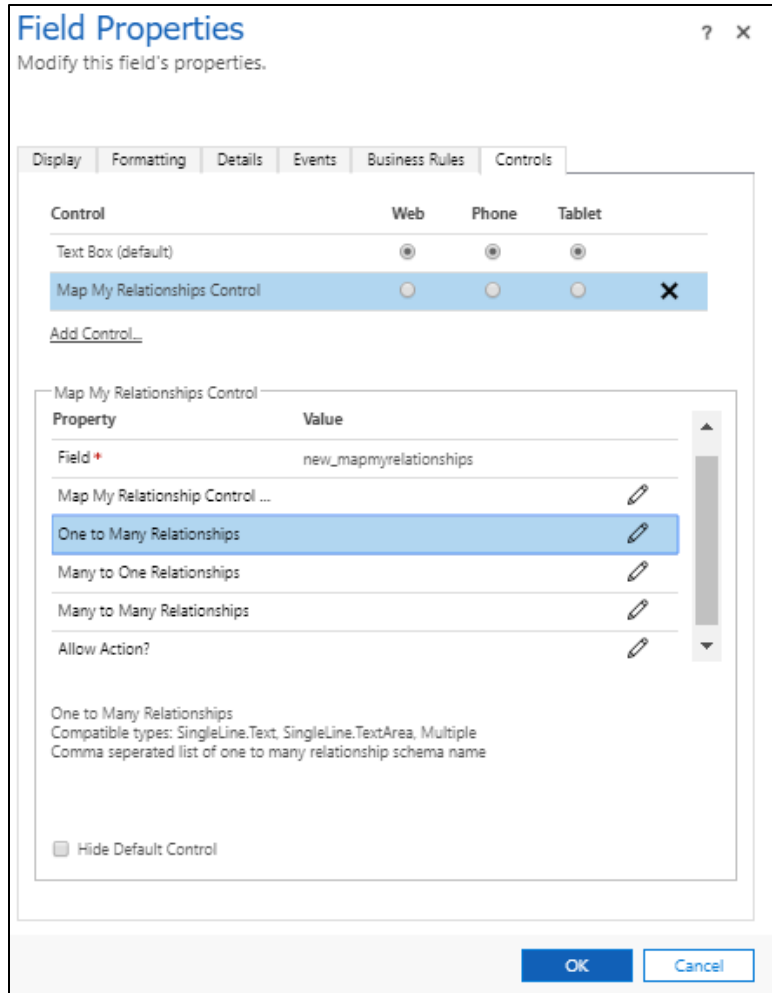
4. Edit the properties of the field and bind control. In field properties, go to Controls and then click on Add Controls button.



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



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



**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.

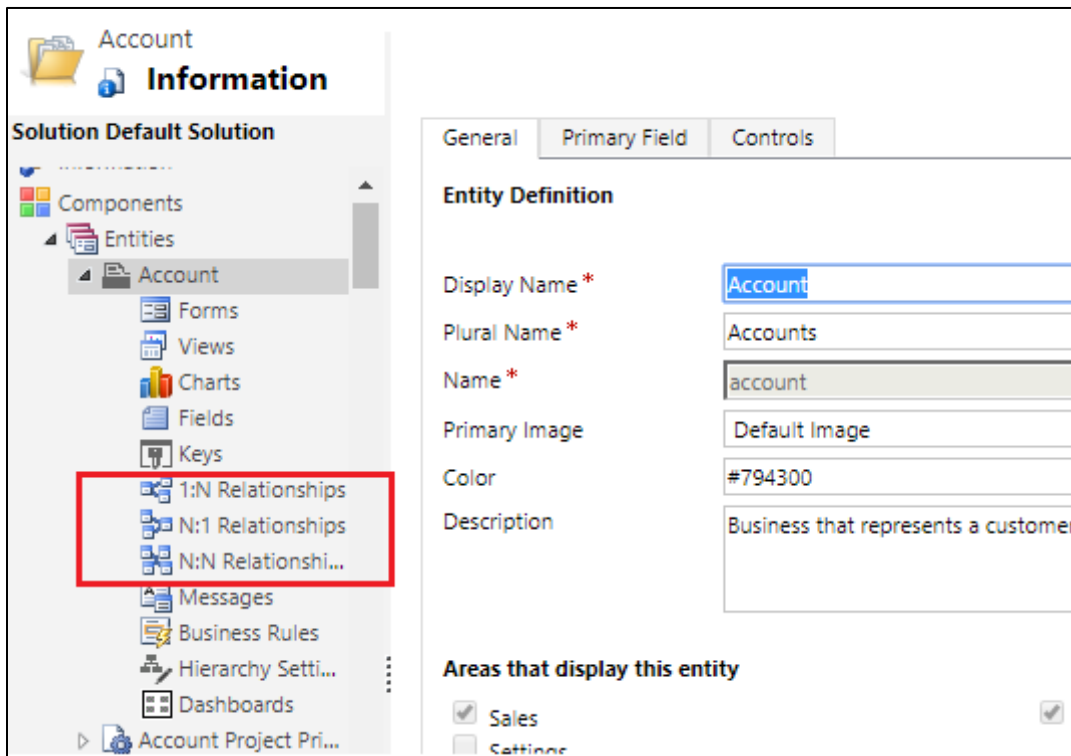
**Follow 'How to get relationships schema name?' section to know how to find relationships schema name.**

**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.

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

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

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

The screenshot shows the configuration for a relationship named 'Account to Appointment'. The 'Relationship Definition' section includes the following fields:

- Primary Entity\*: Account
- Related Entity\*: Appointment
- Name\*: Account\_Appointments (highlighted with a red box)
- Searchable: Yes
- Hierarchical: No
- Lookup Field:
  - Display Name\*: Regarding
  - Name\*: regardingobjectid
  - Field Requirement\*: Optional
  - Description: Choose the record that the appointment relates to.

The screenshot shows the configuration for a relationship named 'Contact to Account'. The 'Relationship Definition' section includes the following fields:

- Primary Entity\*: Contact
- Related Entity\*: Account
- Name\*: account\_primary\_contact (highlighted with a green box)
- Searchable: Yes
- Hierarchical: No
- Lookup Field:
  - Display Name\*: Primary Contact
  - Name\*: primarycontacti
  - Field Requirement\*: Optional
  - Description: Choose the primary contact for the account to provide quick access to contact details.

**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.



The screenshot shows a configuration window for a relationship named 'Contact to Invoice'. The window is titled 'Relationship' and 'Working on solution: Default Solution'. On the left, there is a sidebar with 'Common' and 'Information' options. The main area is divided into sections: 'General', 'Current Entity', 'Other Entity', and 'Relationship Definition'. The 'Current Entity' section has fields for 'Entity Name' (Contact), 'Display Option' (Do not Display), 'Display Area' (Details), 'Custom Label', and 'Display Order' (10,000). The 'Other Entity' section has similar fields for 'Invoice'. The 'Relationship Definition' section has fields for 'Name' (contactinvoices\_association, highlighted with a red box), 'Relationship Entity Name' (contactinvoices), and 'Searchable' (Yes).

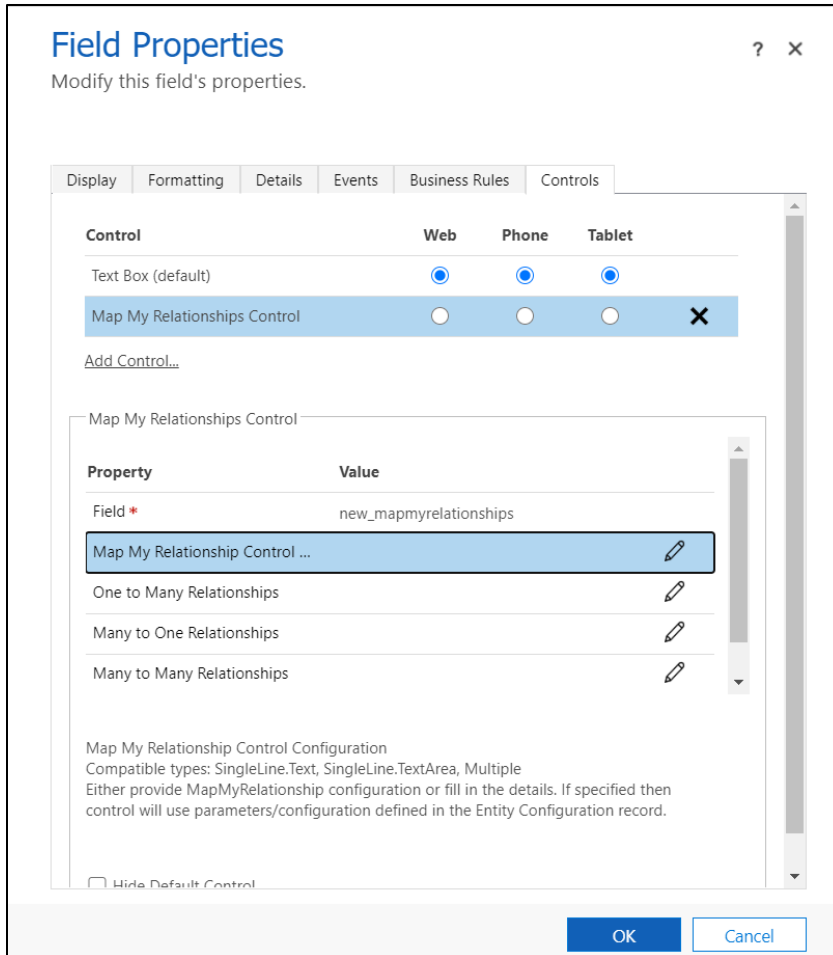
5. Copy this name in comma separated format in properties of the **Map My Relationships** control.

### Set parameters to bind Relationships

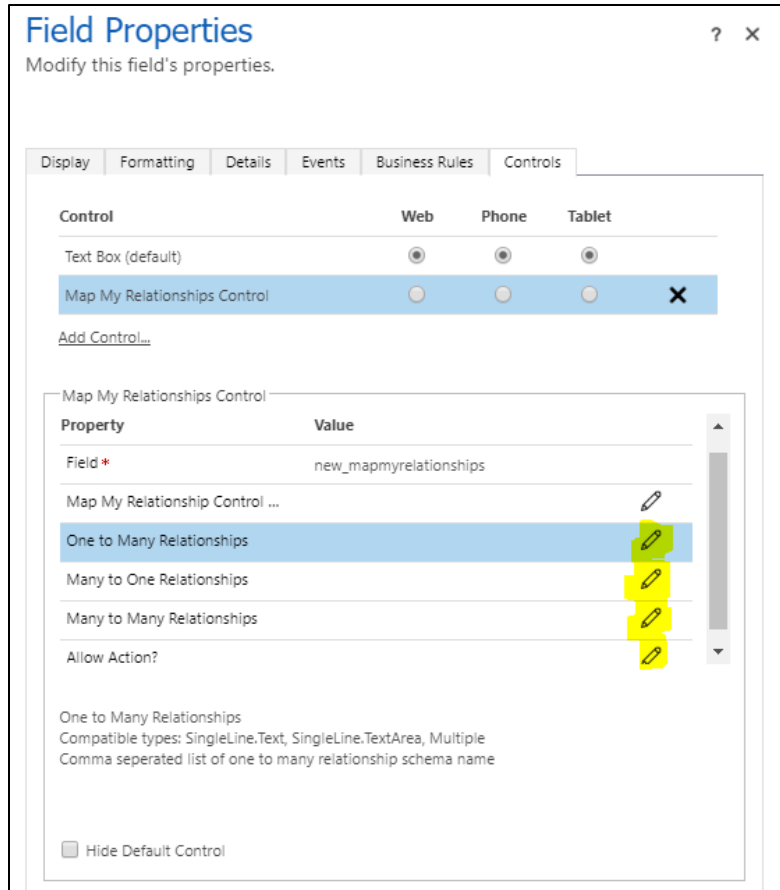
After acquiring 'Relationship Schema Names', you are now ready to set parameters to bind Relationships.

Here are the steps for the same:

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



- 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.

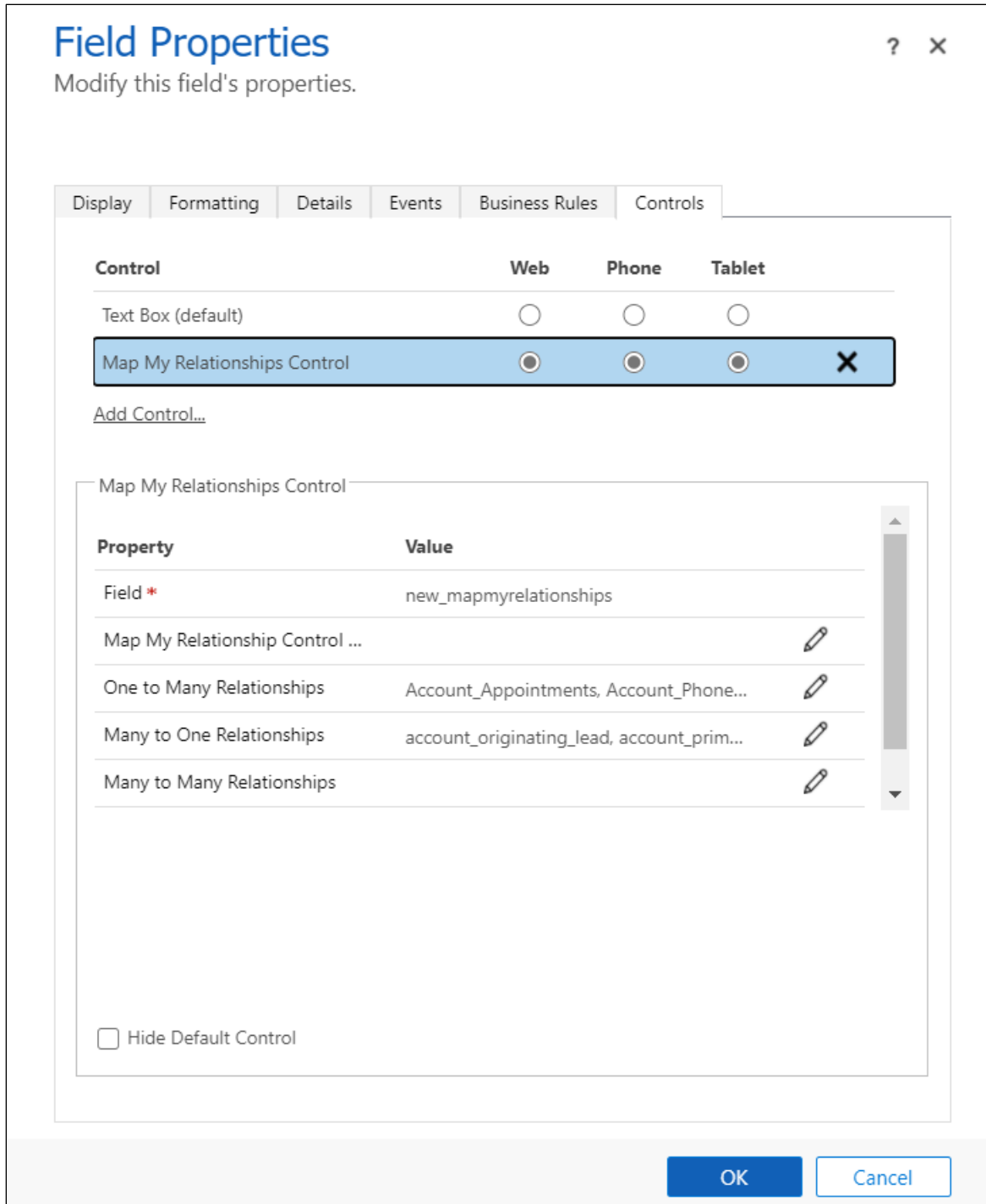
### Configure Property "One to Many ..." ✕

**Bind to a static value**

**Bind to a value on a field**

Comma seperated list of one to many relationship schema name

7. Repeat 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.

**Configure Property "Allow Action?"**

**Bind to a static value**

SingleLine.Text

**Bind to a value on a field**

Enter 0 for Yes and 1 for No. Default is Yes (0)

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

## Field Properties ? X

Modify this field's properties.

Display Formatting Details Events Business Rules Controls

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

[Add Control...](#)

Map My Relationships Control

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

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

Hide Default Control

OK
Cancel

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 \*

Display label on the form

**Field Behavior**

Specify field-level behavior

Field is read-only

**Locking**

Specify whether to lock this field on the form.

Lock the field on the form

**Visibility**

Specify the default visibility of this control.

Visible by default

**Availability**

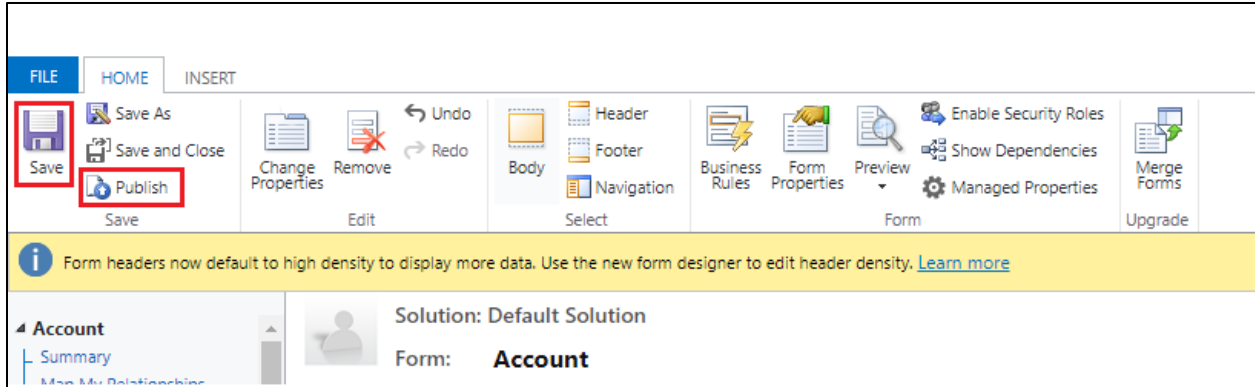
Specify the default availability of this field on phone.

Available on phone

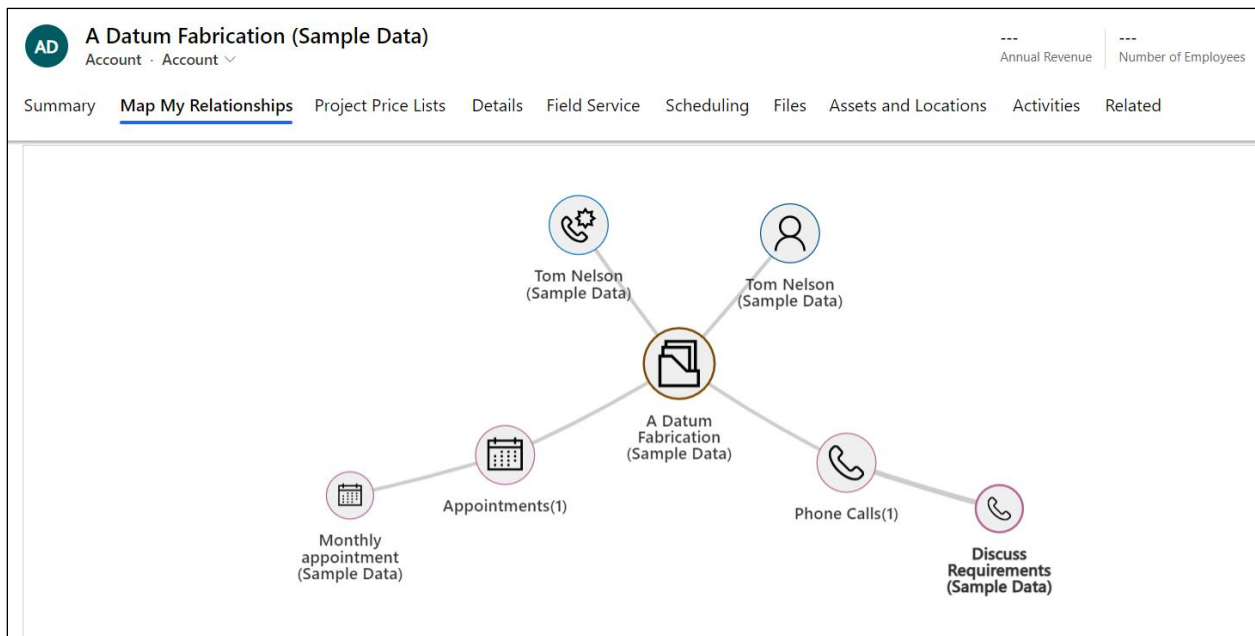
OK Cancel

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.

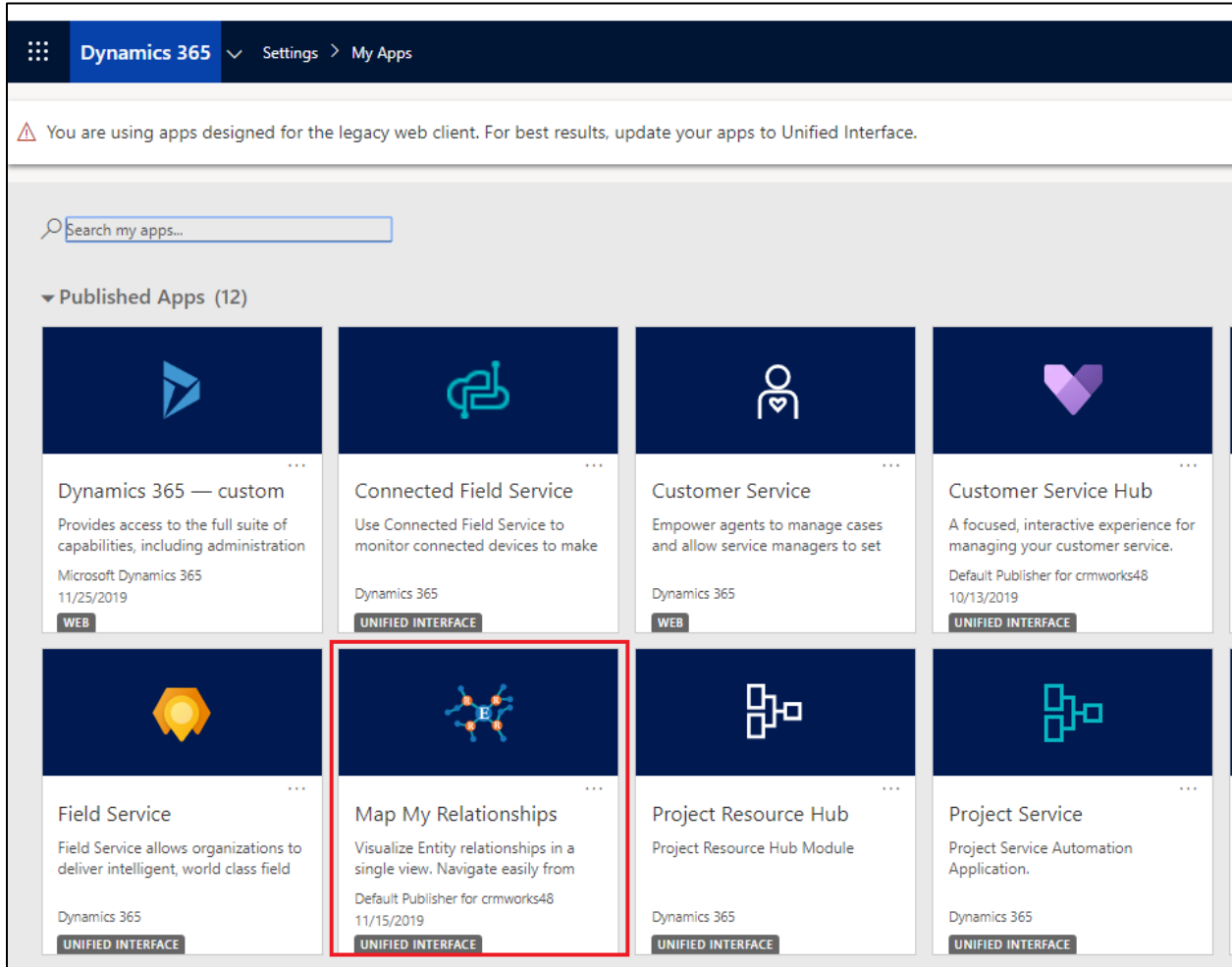
## Map My Relationships – Advance Configuration

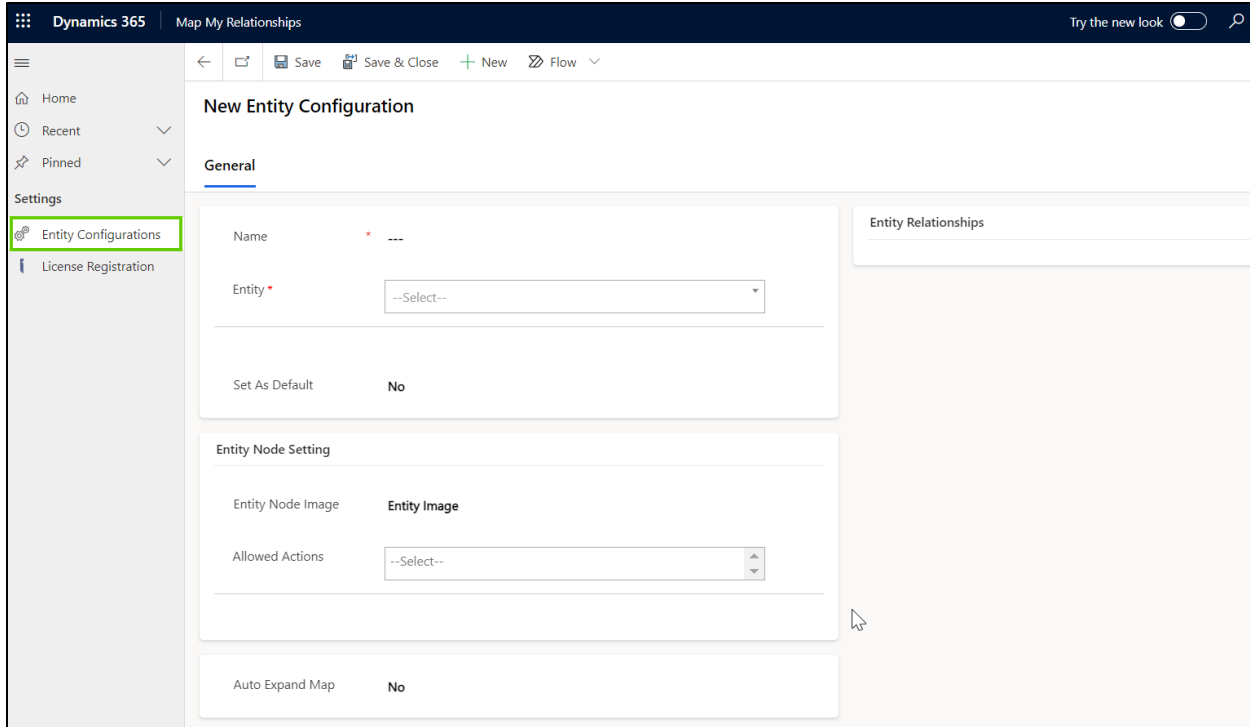
**General configuration details:**

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.

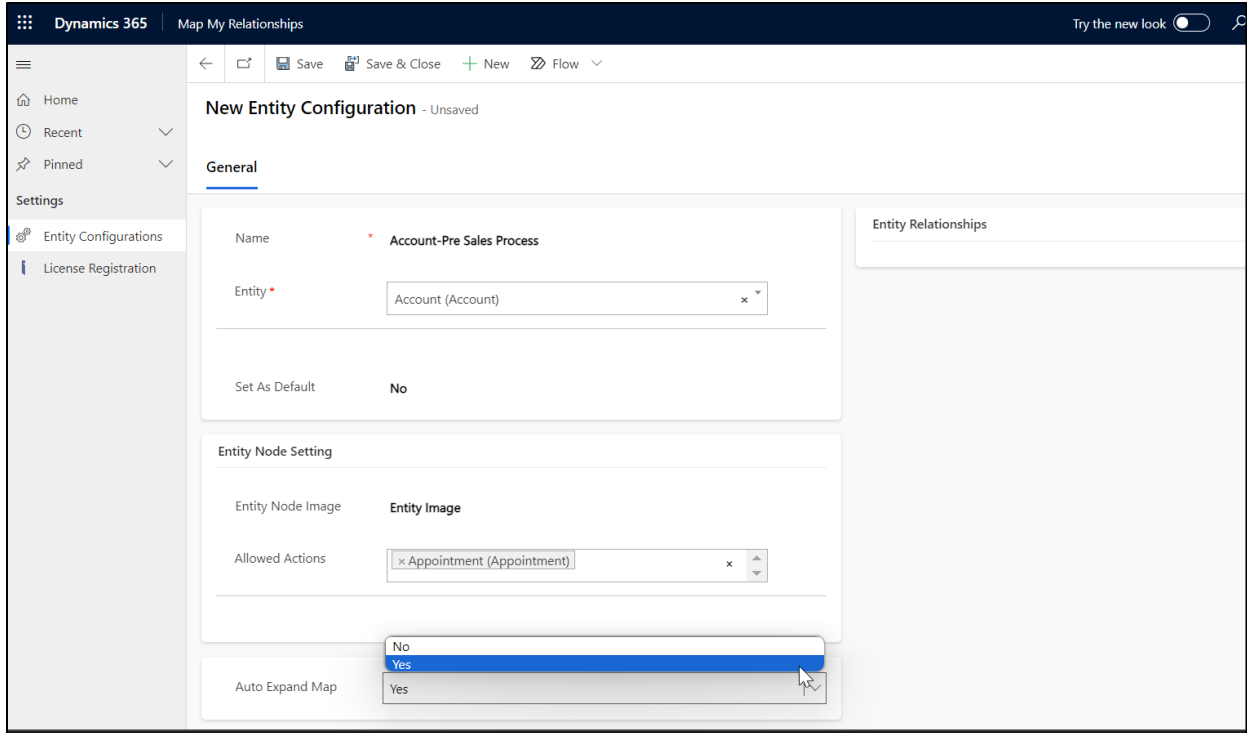
Go to 'Map My Relationships' app and create 'Entity Configuration' entity record.



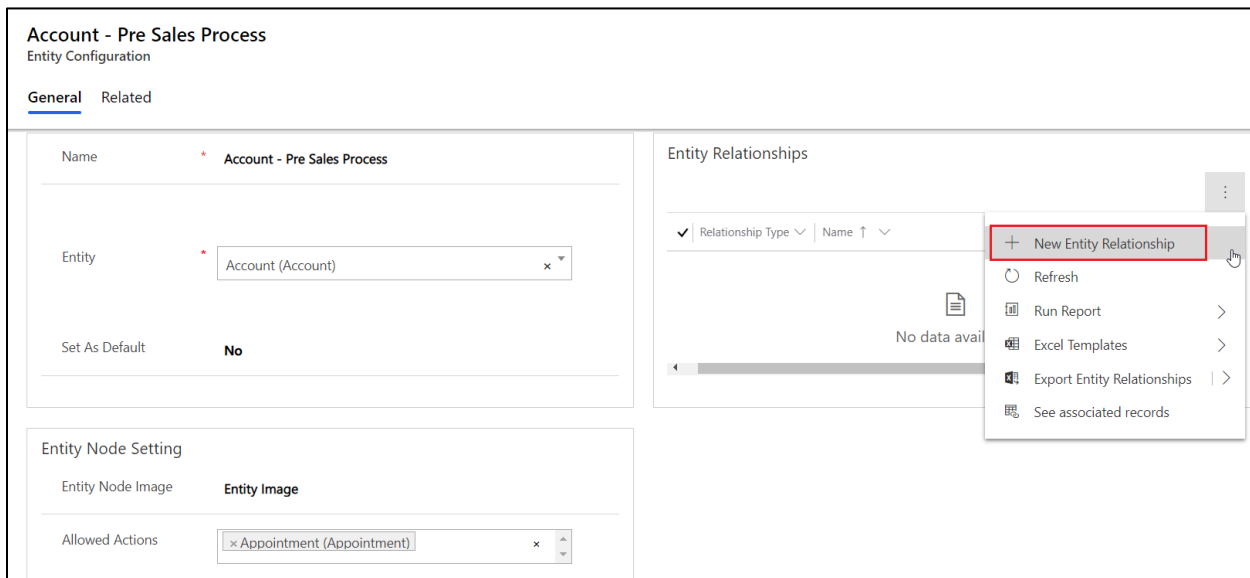


- **Name:** Enter user friendly name for the record. This name will be used in the value for 'Map My Relationships Control Configuration' field property.
- **Entity:** Select the entity from the list of entity. This tells the control that the configuration is for the selected entity.
- **Set As Default:**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

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- 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.




## Map My Relationships – User Manual

**New Entity Relationship**

**General**

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

Relationship \* --Select--

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

Child Configuration ---

**Node Settings**

Relationship Node Image **Entity Image**

Allowed Actions --Select--

View to show fields on Tooltip --Select--

**Cluster Settings**

Group By --Select--

Measure --Select--

Aggregate Type ---

- **Relationship Type:** Choose which type of relationship you want to add. Options are 'One-to-Many', 'Many-to-One' and 'Many-to-Many'.
- **Relationship:** Select the relationship from the list of relationship. This get filtered based on the option selected in the 'Relationship Type' field.
- **Relationship Node Image:** Choose image needs to displayed on the node of the primary entity record. Available options are, Entity Image, Record Image and Image URL.
  - ➔ Entity Image: The image of the entity that we see for the entity in the sitemap.
  - ➔ Record Image: The image of the record that we see on the record. If image is not present for record the Entity image will be displayed.
  - ➔ Image URL: A field will be visible upon selection of this option. Enter the external or internal image URL.
- **Default View Filter:** Choose the default view for the relationship map.

**Node Settings**

Relationship Node Image **Entity Image**

Default View Filter **All Contacts** x

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 -

**opportunity\_invoices**  
Entity Relationship

General Related

Node Settings

Relationship Node Image      **Entity Image**

Allowed Actions      × Appointment (Appointment) ×

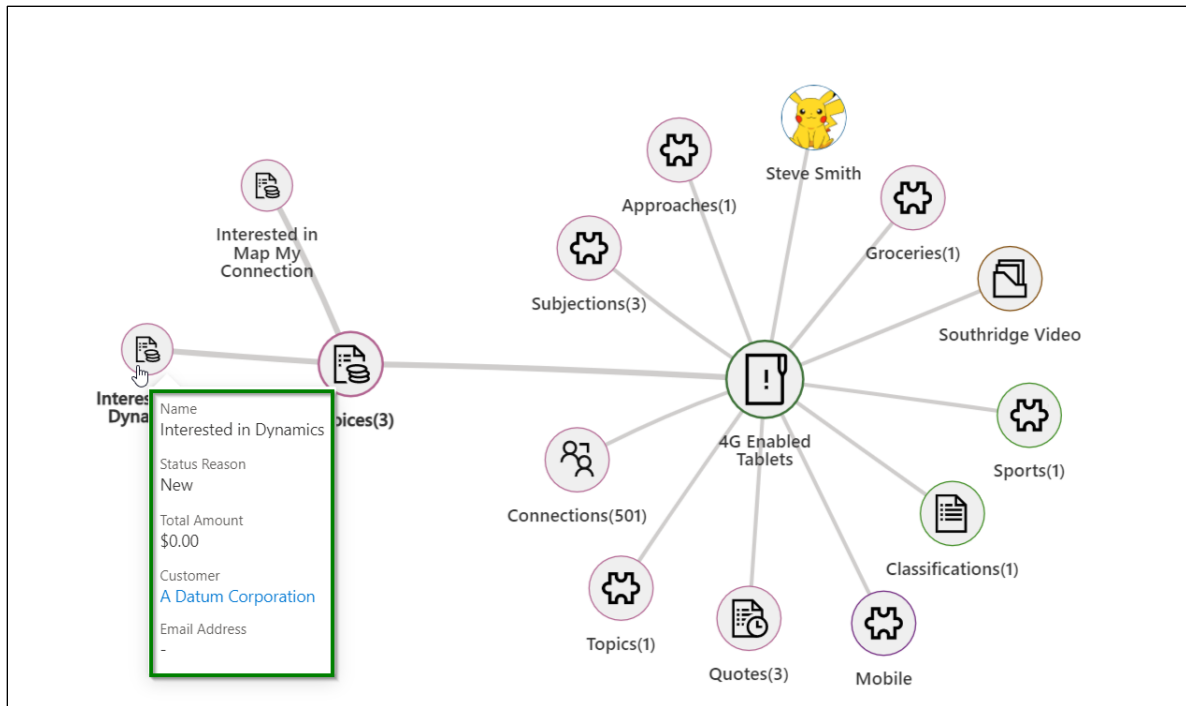
**View to show fields on Tooltip**      Active Invoices ×

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

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

Information shown on hovering over the respective entity record –



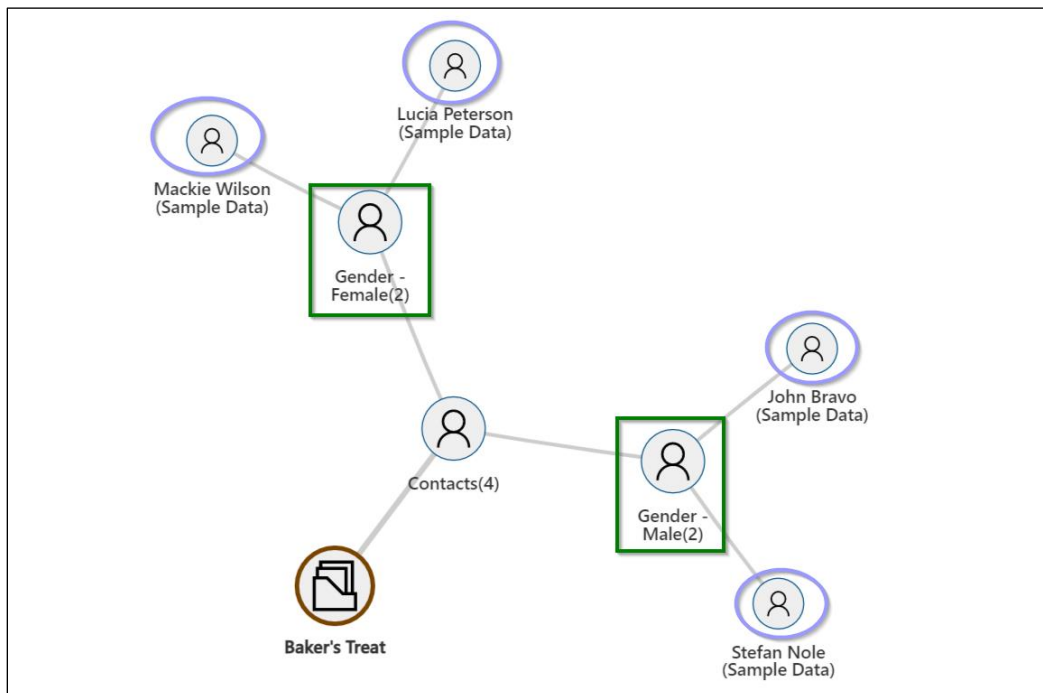
- **Child Configuration:** A list of Entity Configurations will be available. Select one such configuration to further drill down through the relationship and see associated entity records.

## Map My Relationships – User Manual

- **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:

The screenshot shows the configuration interface for the 'contact\_customer\_accounts' relationship. The 'Cluster Settings' section is highlighted with a green box, indicating the 'Group By' field is set to 'Gender (gendercode)'. Other settings include 'Measure' set to 'Credit Limit (creditlimit)' and 'Aggregate Type' set to 'SUM'. The 'Node Settings' section shows 'Relationship Node Image' set to 'Entity Image', 'Allowed Actions' set to '--Select--', and 'View to show fields on Tooltip' set to '--Select--'.

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



## Map My Relationships – User Manual

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

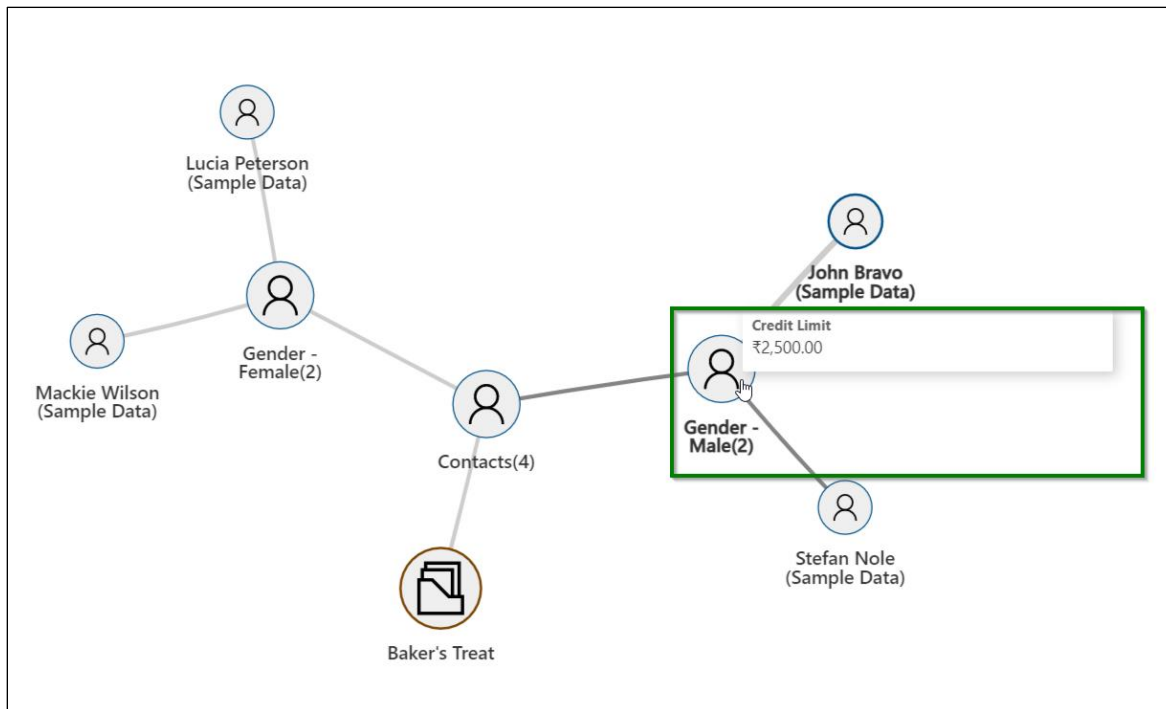
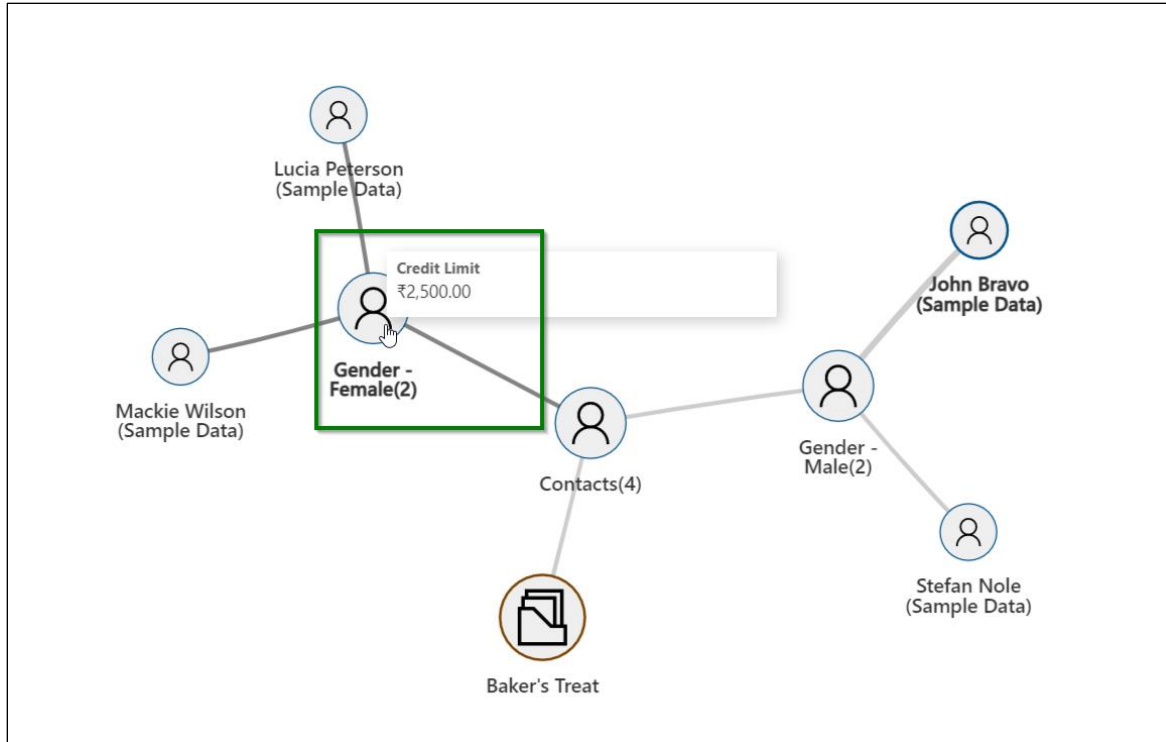
Contact 4 (Male) – Rs. 2,000

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

The screenshot shows the configuration page for the relationship 'contact\_customer\_accounts'. The 'General' tab is active. The 'Relationship' field is set to 'contact\_customer\_accounts(contact)'. The 'Child Configuration' is empty. Under 'Node Settings', 'Relationship Node Image' is 'Entity Image', 'Allowed Actions' is '--Select--', and 'View to show fields on Tooltip' is '--Select--'. Under 'Cluster Settings', 'Group By' is 'Gender (gendercode)'. The 'Measure' field is 'Credit Limit (creditlimit)' and the 'Aggregate Type' is 'SUM'. A green rectangular box highlights the 'Measure' and 'Aggregate Type' fields.

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

## Map My Relationships – User Manual



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

## Map My Relationships – User Manual

The screenshot displays the configuration interface for the 'opportunity\_customer\_accounts' Entity Relationship. The page is titled 'opportunity\_customer\_accounts - Saved' and shows the user 'Jack M' as the owner, with a creation date of '2/23/2022 5:54 PM'. The 'General' tab is selected, and the relationship is configured as 'One-to-many'.

**Relationship Type:** \* One-to-many

**Relationship:** opportunity\_customer\_accou... x

**Node Label:** Opportunities

**Use Custom Label:** No

**Node Settings:**

- Relationship Node Image:** Entity Image
- Default View:** My Open Opportunities x

**Drill Down Settings:**

- Entity Configuration:** \* Account1
- Child Configuration:** ---

**Cluster Settings:**

- Group By:** Status (statecode) x
- Node Label:** Status-{value}

**Node Settings (Detailed):**

- Relationship Node Image:** Entity Image
- Default View Filter:** My Open Opportunities x
- Allowed Actions:** x Appointment (Appointment)
- View to show fields on Tooltip:** Opportunities I Follow x

**Advanced Configuration (Right Panel):**

- Group By:** Status (statecode) x
- Node Label:** Status-{value}
- Use Custom Label:** No
- Measure:** Est. Revenue (estimatedvalue) x
- Aggregate Type:** SUM
- Node Label:** Est. Revenue
- 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.

## Field Properties

Modify this field's properties.

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

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

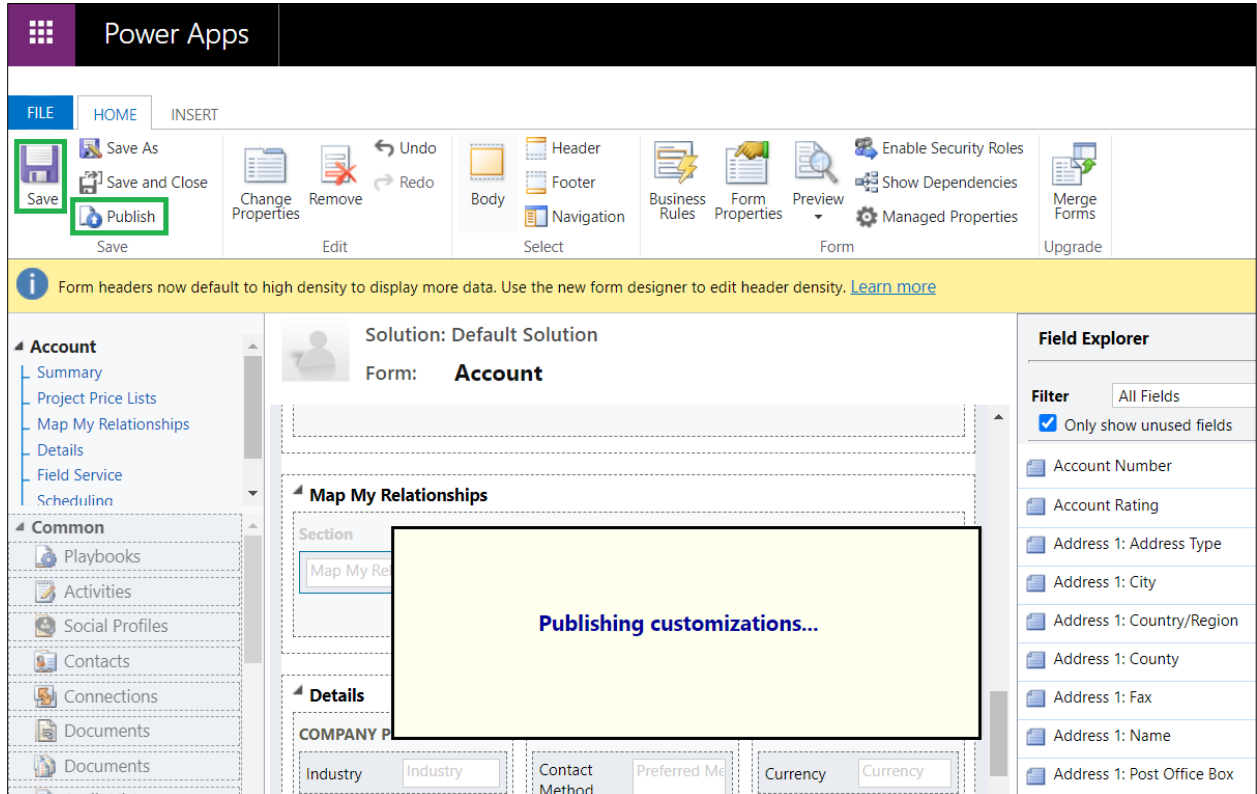
[Add Control...](#)

Map My Relationships Control

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

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

Hide Default Control



### Drill down through relationships:

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

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

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

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

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

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

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

**Entity configuration:**

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

**Account Child Connection**  
Entity Configuration

**General** Related

Name \* Account Child Connection

Entity \* Account (Account) x

Set As Default No

Entity Node Setting

Entity Node Image Entity Image

Allowed Actions x Appointment (Appointment) x

**Relationship configuration:**

- **Relationship Type:** One to Many (Account holding one to many relationship with connections).
- **Relationship:** account\_connections1(connection).
- **Relationship Node Image:** As required.
- **Allowed Actions:** As required.

## Map My Relationships – User Manual

- **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).

The screenshot shows the configuration for an Entity Relationship named 'account\_connections1'. The 'General' tab is active. The 'Relationship Type' is set to 'One-to-many'. The 'Relationship' dropdown is set to 'account\_connections1(connection)'. The 'Entity Configuration' is set to 'Account Child Connection'. The 'Use Default Configuration' checkbox is checked, and the value is 'Yes'. Under 'Node Settings', the 'Relationship Node Image' is 'Entity Image', 'Allowed Actions' includes 'Fax (Fax)', and 'View to show fields on Tooltip' is set to 'Active Connections'. Under 'Cluster Settings', both 'Group By' and 'Measure' are set to '--Select--'.

The screenshot shows the configuration for an Entity Configuration named 'Account Child Connection'. The 'General' tab is active. The 'Name' is 'Account Child Connection'. The 'Entity' dropdown is set to 'Account (Account)'. The 'Set As Default' checkbox is unchecked, and the value is 'No'. Under 'Entity Node Setting', the 'Entity Node Image' is 'Entity Image' and 'Allowed Actions' includes 'Appointment (Appointment)'. On the right, the 'Entity Relationships' table is visible, with the first row highlighted in green:

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

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

### Entity configuration:

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

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

### Associated account records of contact connection

Entity Configuration

**General** Related

Name \* Associated account records of contact connection

Entity \* Contact (Contact) x

Set As Default **Yes**

Entity Node Setting

Entity Node Image Entity Image

Allowed Actions --Select--

**Relationship configuration:**

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



## Map My Relationships – User Manual

**account\_primary\_contact**  
Entity Relationship 12/5/2020 9:55 AM  
Owner Created On

**General** Related

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

Relationship \*

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

Child Configuration ---

**Node Settings**

Relationship Node Image **Entity Image**

Allowed Actions

View to show fields on Tooltip

**Cluster Settings**

Group By

Measure

Aggregate Type ---

**Associated account records of contact connection**  
Entity Configuration 12/4/2020 12:25 PM  
Owner Created On

**General** Related

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

Entity \*

Set As Default **Yes**

**Entity Relationships**

Relationship Type	Name	Entity Configuration	Created On
One-to-many	account_primary_contact	Associated account records of contact connection	12/5/2020

**Entity Node Setting**

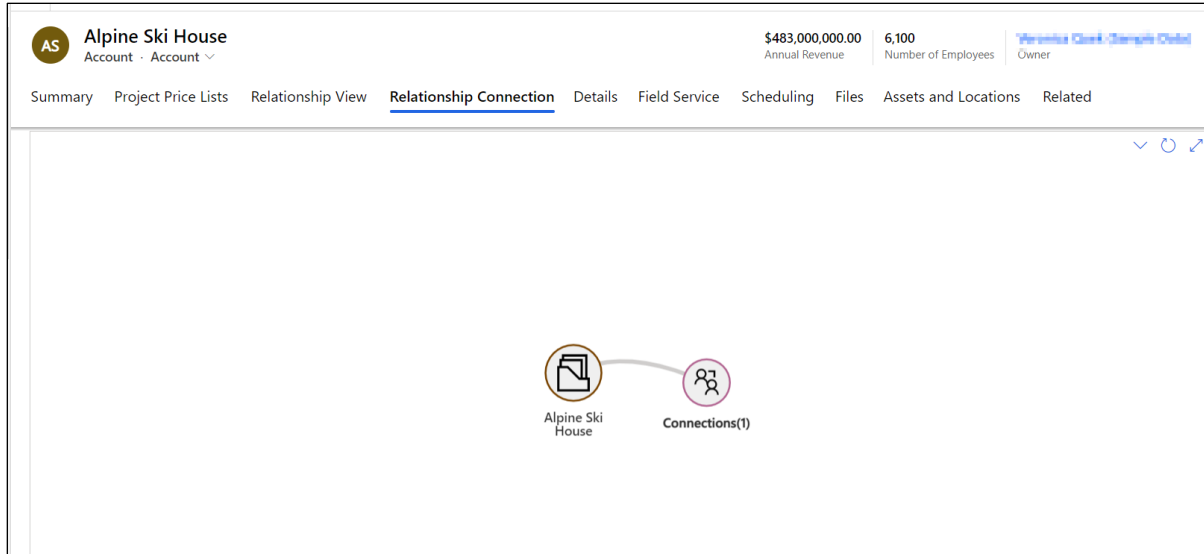
Entity Node Image **Entity Image**

Allowed Actions

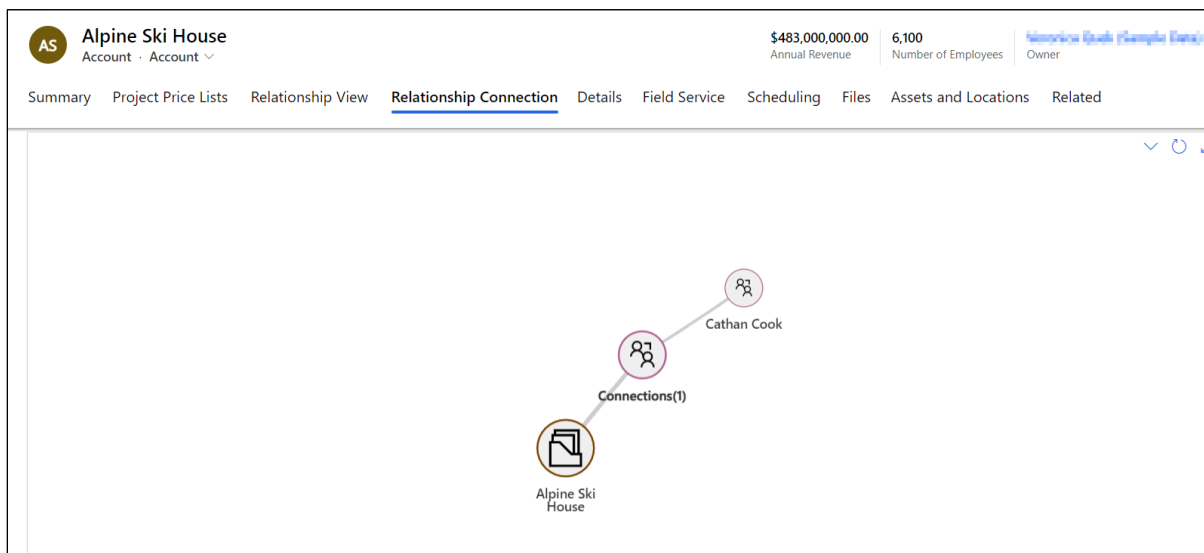
**Note - At a time, application will accept only one entity configuration set as default to be used as a child configuration to see the associated entity records of the connection (associated account records of contact connection in this instance).**

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

## Map My Relationships – User Manual

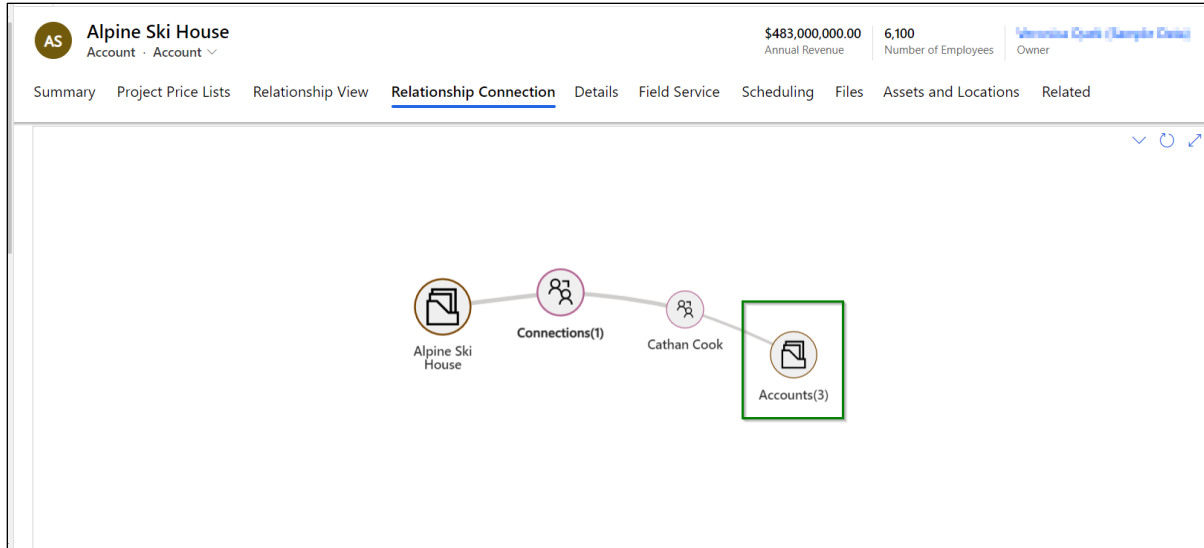


5) Double click on **'Connections'** to expand it and it will show a connection record.

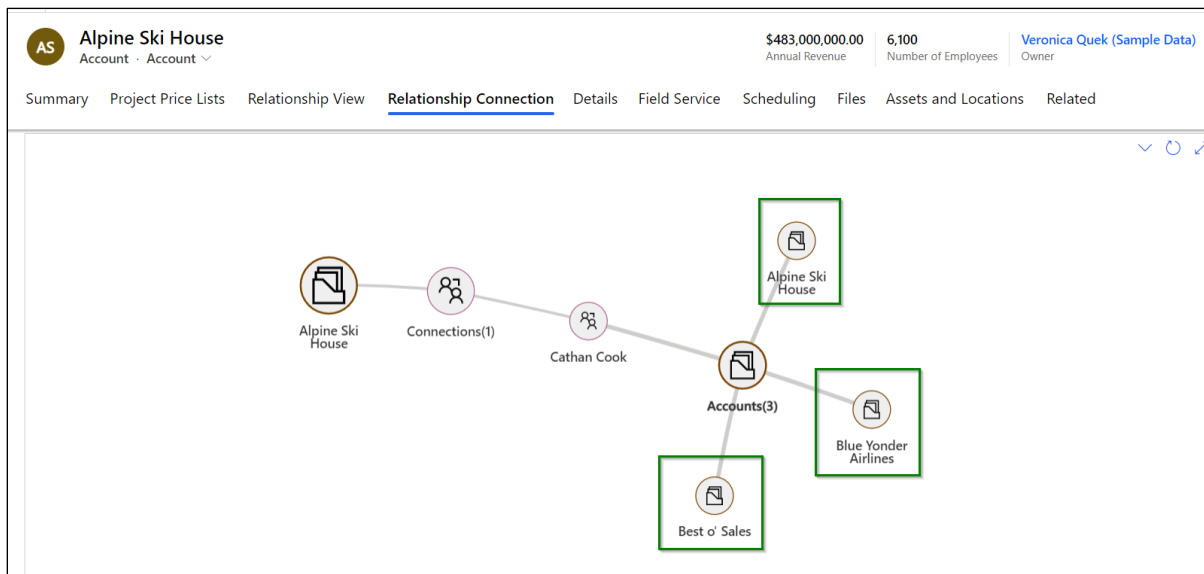


6) Now further expand (double click) contact record **'Cathan Cook'** and it will show you the association of accounts with the contact connection record.

## Map My Relationships – User Manual



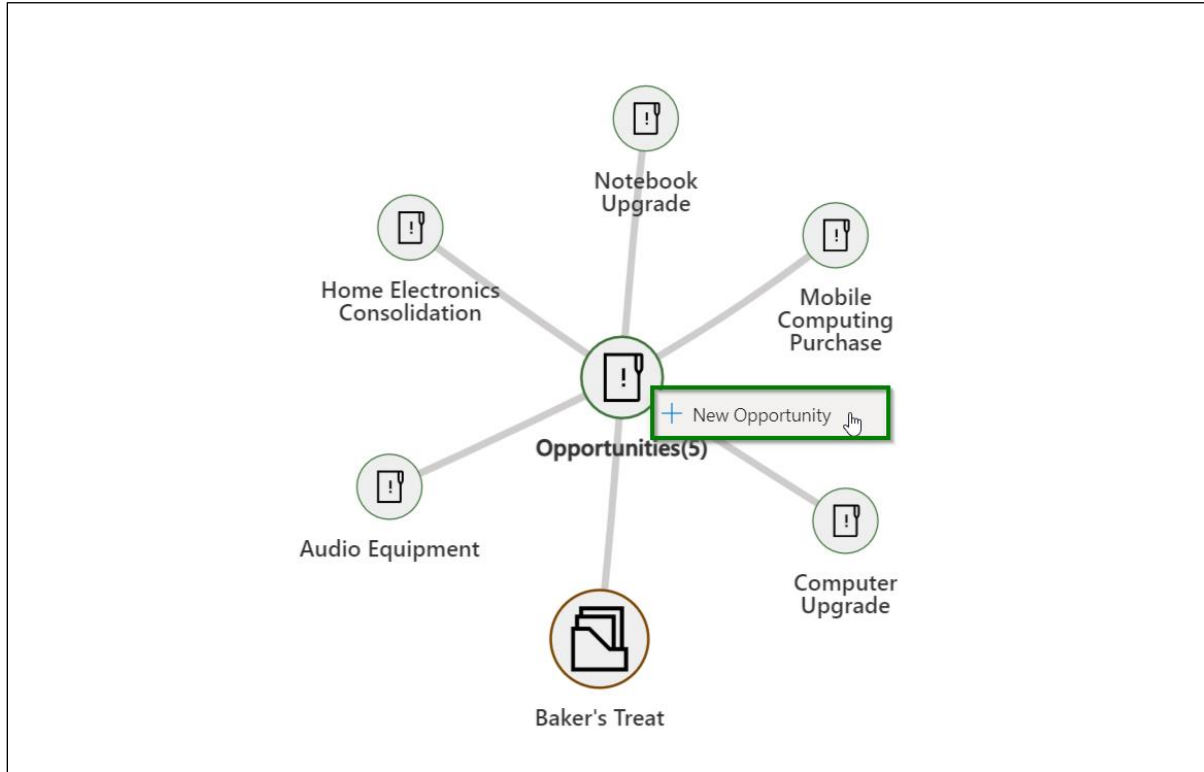
7) Again double click on **'Accounts'** to expand it and it will show the associated account records of the contact connection record **'Cathan Cook'**.



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

## New entity record creation through relationship view

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

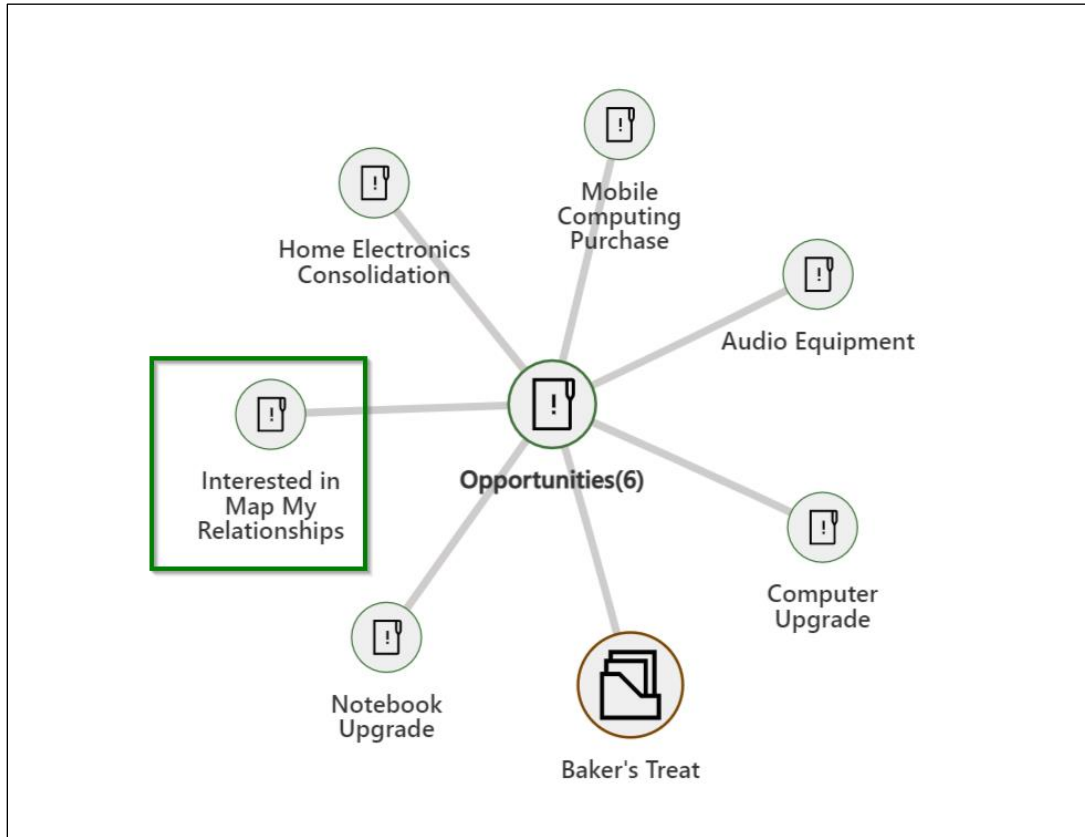


It will open up a quick create form.

The screenshot shows the "Quick Create: Opportunity" form. The form is open over the relationship diagram. The form fields include: Topic (Interested in Map My Relationships), Order Type (Item based), Contact (---), Account (---), Contracting Unit (---), Budget Amount (---), Est. Revenue (---), Est. Close Date (---), and Customer Need (---). The "Save and Close" button is highlighted.

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

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



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## Features

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### 360 Degree view

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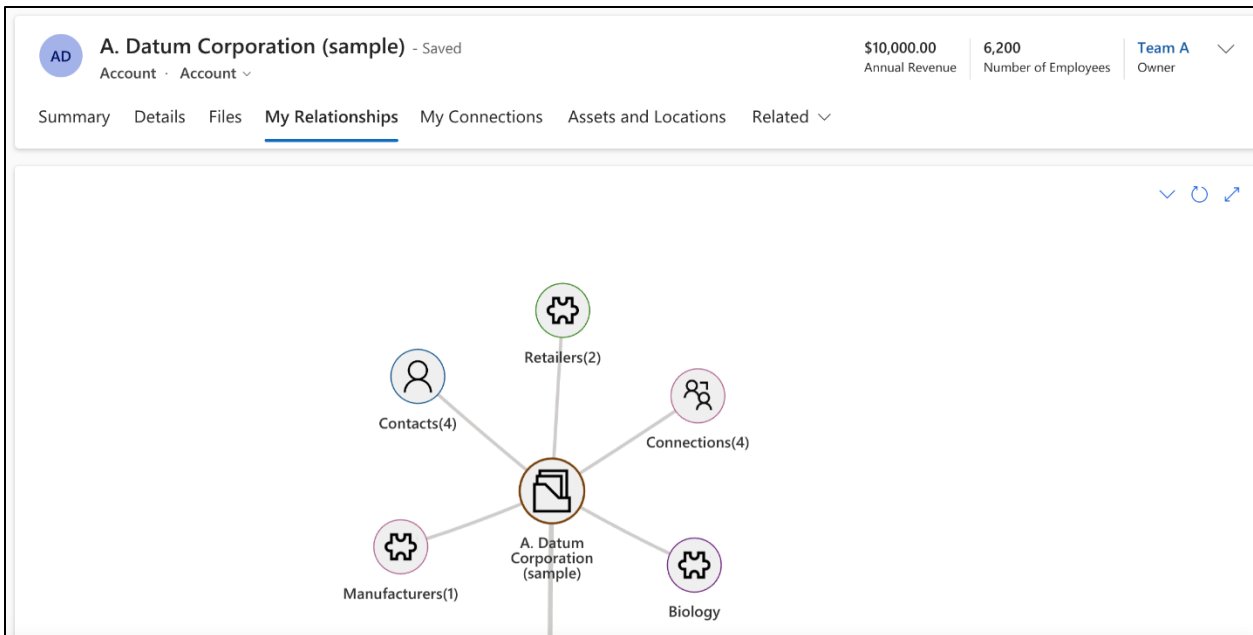
Map My Relationships provides you with 360 degree view of all important data of the record. Getting this summary of data in a single view further helps to interpret and analyze information quickly.

# Map My Relationships – User Manual

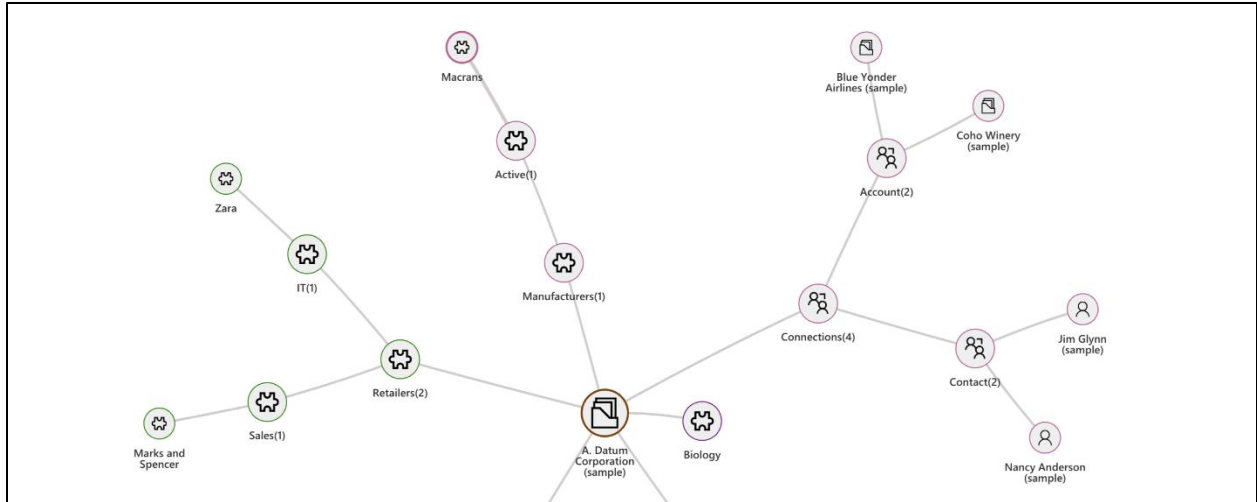


## Auto Expand Nodes

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



## Map My Relationships – User Manual



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### 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.



## Adventure Works (sample)

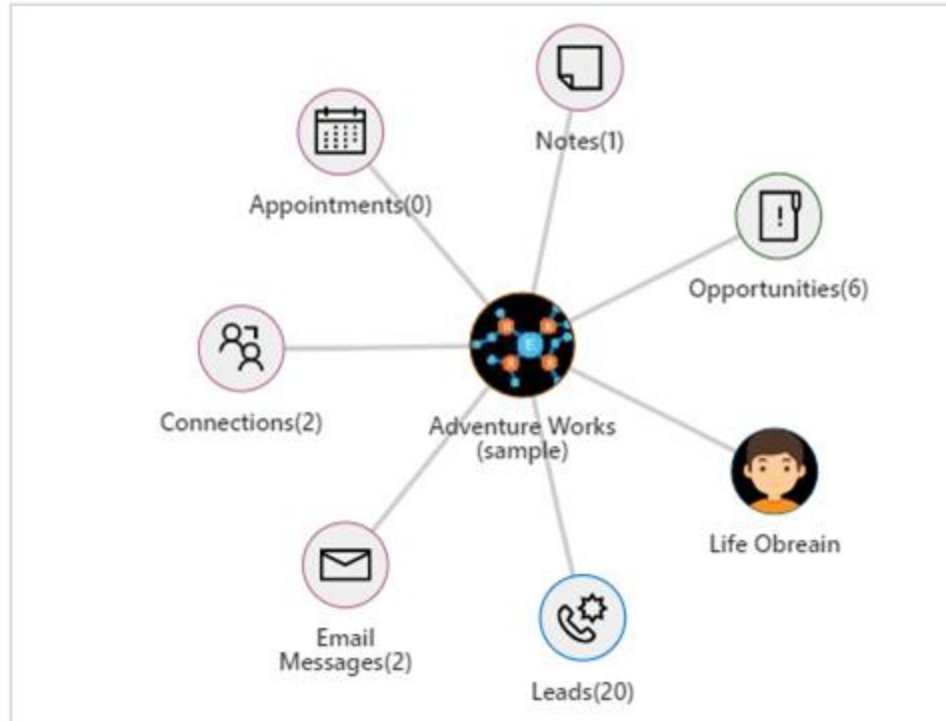
Account · Account ▾

Summary

Map My Relationships

Project Price Lists

Details



---

### Perform Quick Actions

---

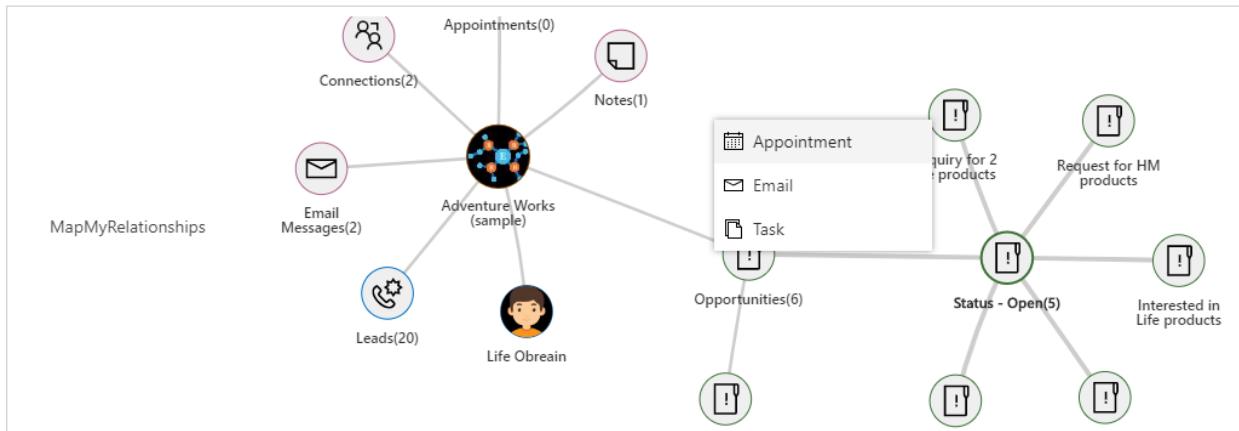
With Map My Relationships you can quickly create activity records like Email, Tasks, Phone calls, Appointments, etc. without navigating to respective records. You can configured any system or custom activities to allow the user to quickly create them from this view.



# Map My Relationships – User Manual

 **Adventure Works (sample)**  
Account · Account ▾ \$60,000.00 Annual Revenue | 4,300 Number of

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

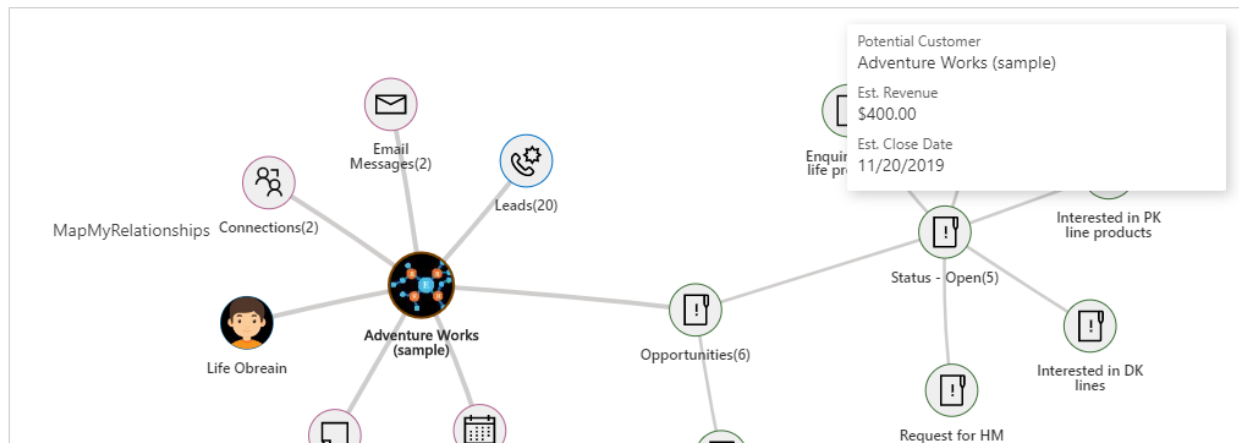


## View Record Details

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

 **Adventure Works (sample)**  
Account · Account ▾ \$60,000.00 Annual Revenue | 4,300 Number of E

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



## Grouping & Aggregation

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

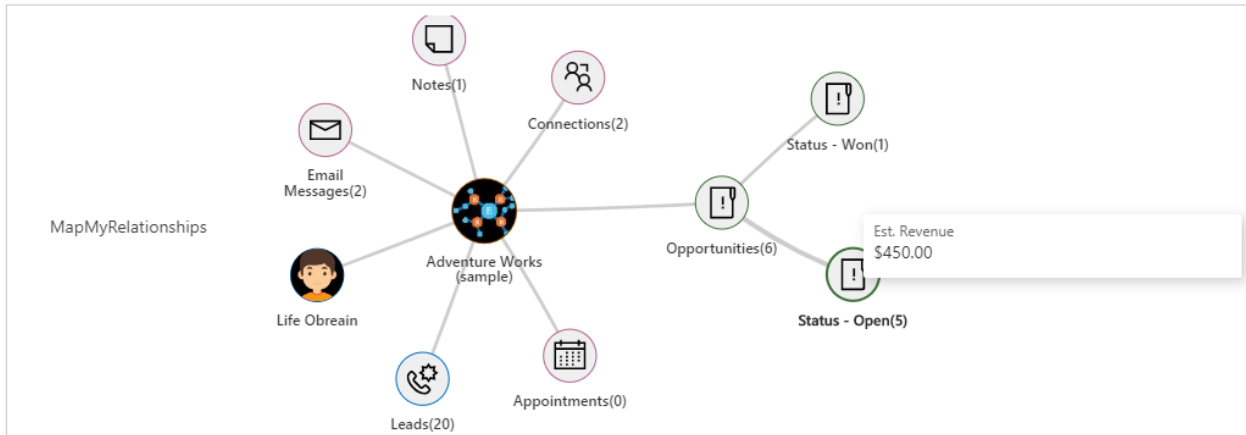
# Map My Relationships – User Manual



**Adventure Works (sample)**  
Account · Account ▾

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

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

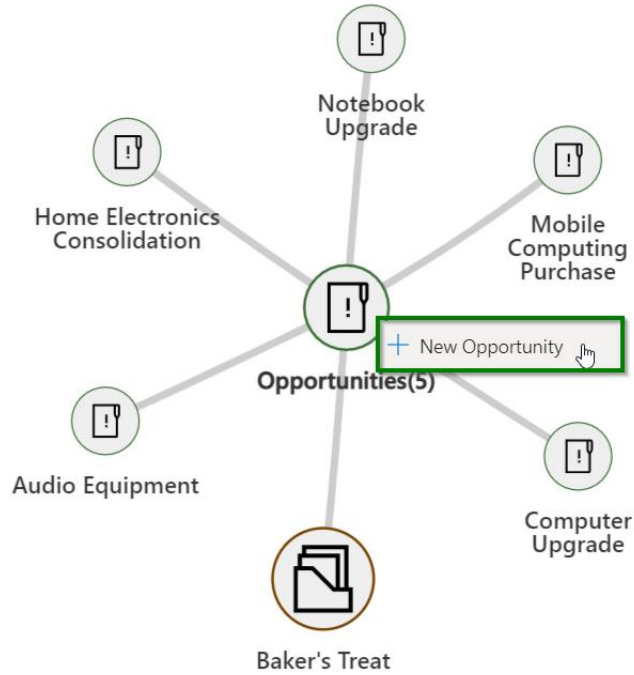


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## Create Associate Records

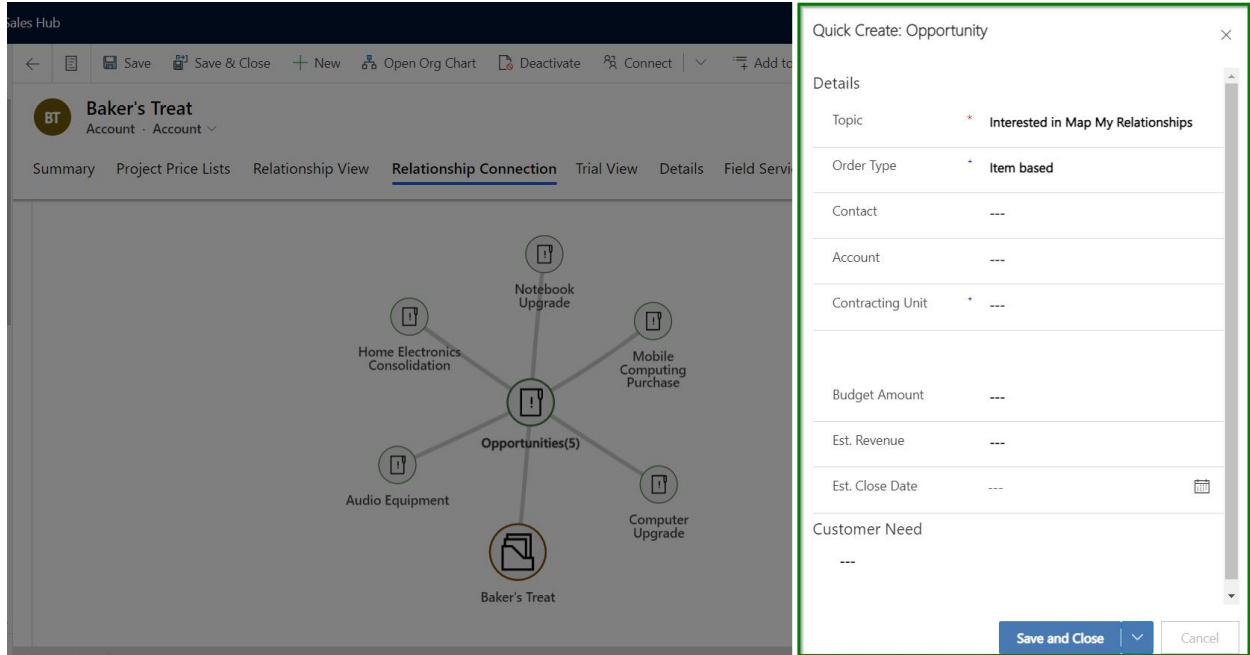
---

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.

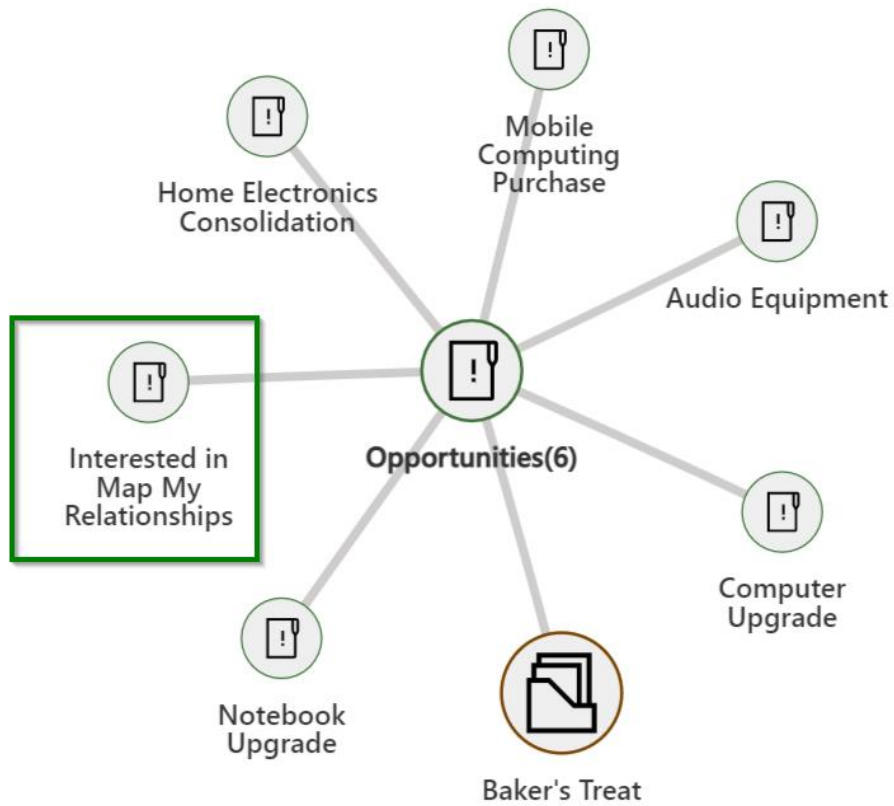


The user has to click on the entity node and it will open up a quick create form.

## Map My Relationships – User Manual

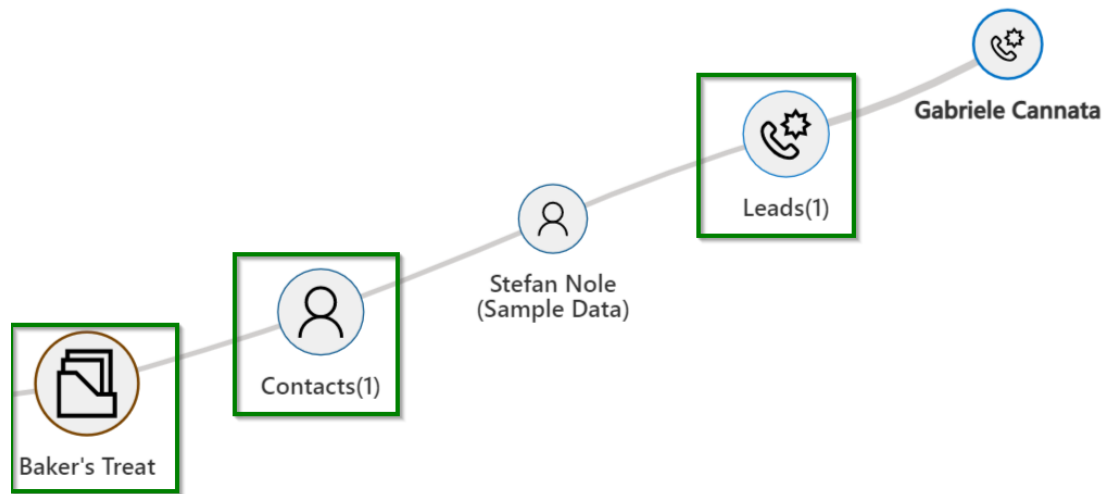


After the record is created, the newly added record will start showing in the relationship view.

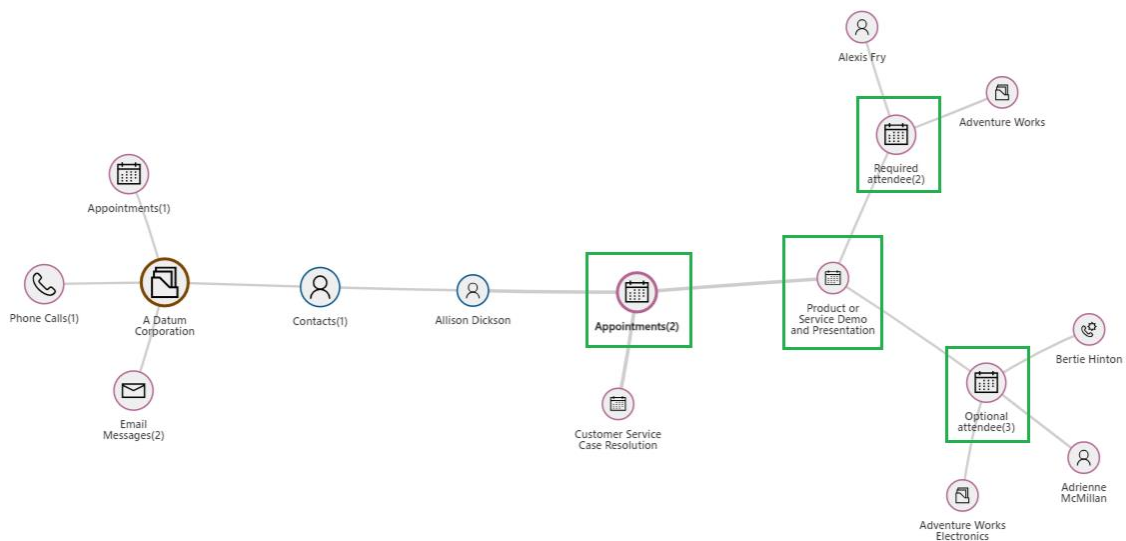


## N-level relationships

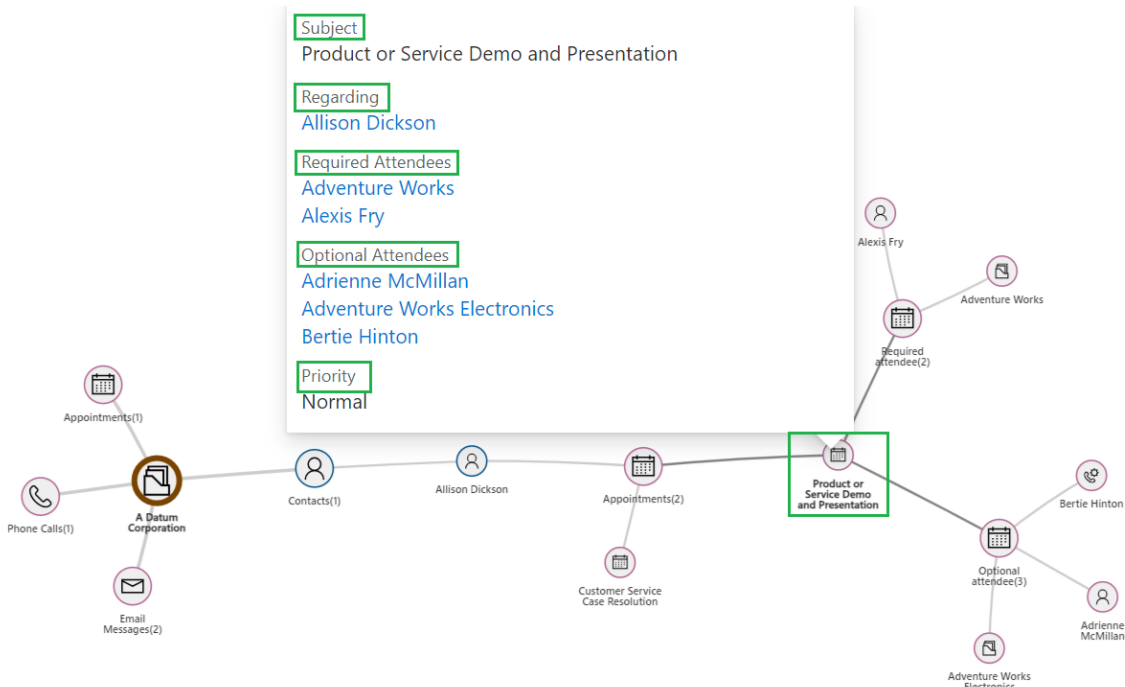
Map My Relationships enables users to drill down further through N-level relationships of a particular entity to see associated entity records.



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**.



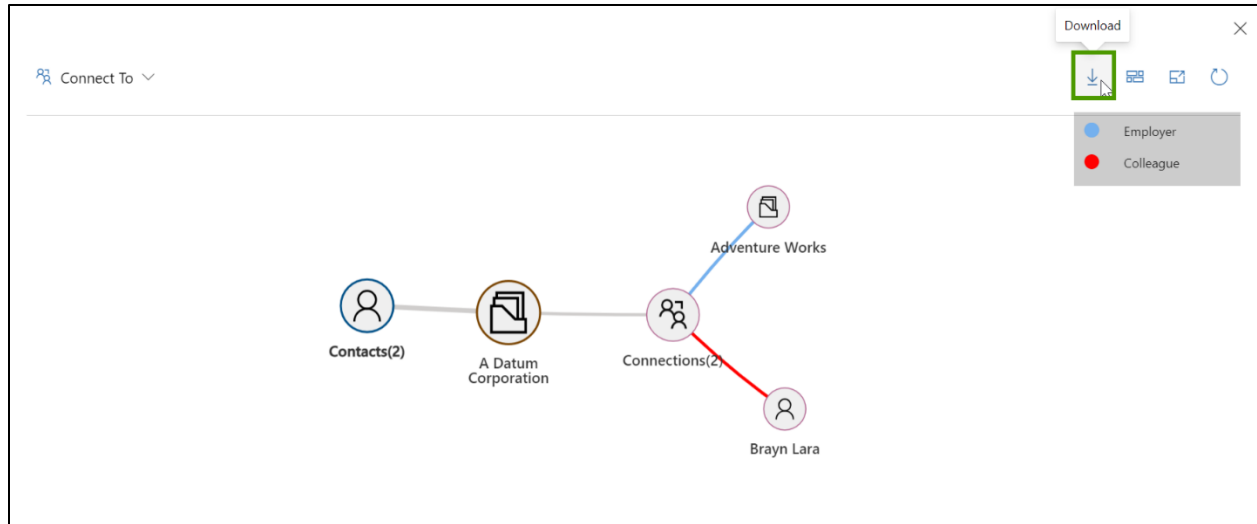
Similarly, users can also visualize the **Audience** of an “Email activity record” in **Mind Map View** like To, Cc, etc.

---

### 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.

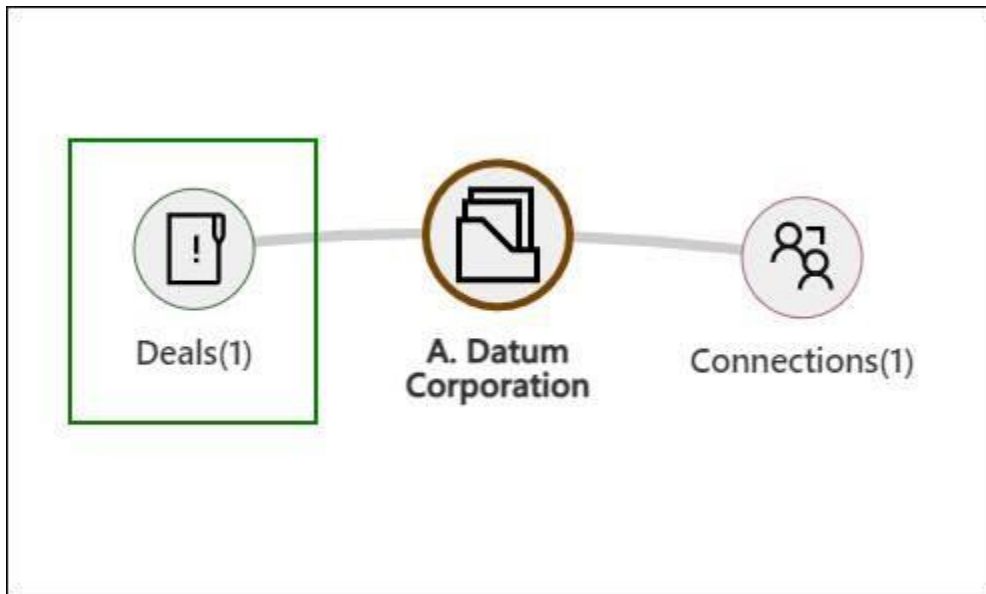
#### Relationship Level

'**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.

Relationship Type	* One-to-many
Relationship	* opportunity_customer_accou... x
Node Label	Opportunities
Use Custom Label	Yes
Custom Label	* Deals

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.

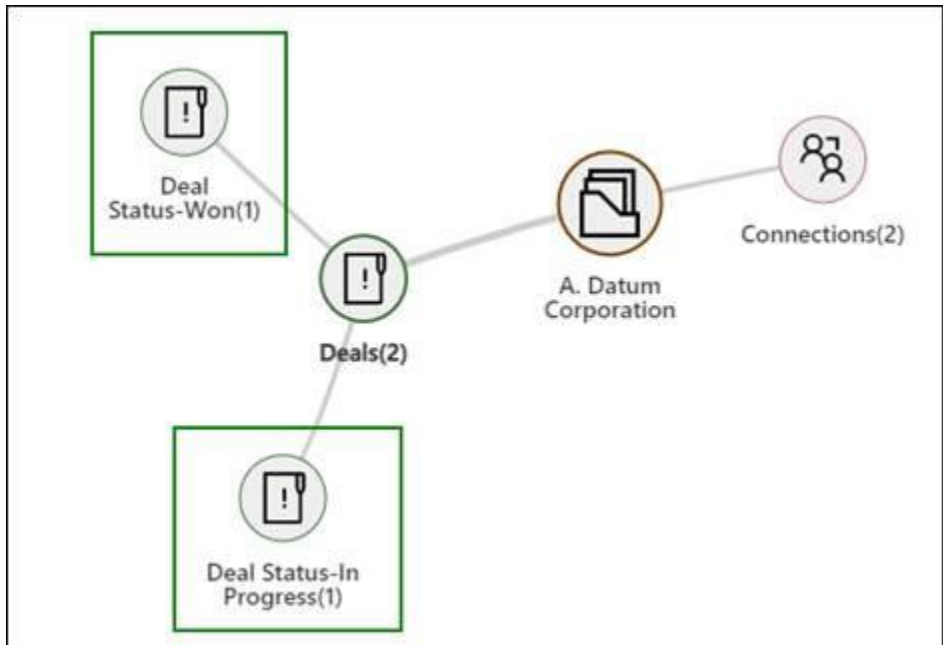


Cluster Settings

Group By Status Reason (statuscode) × ▾

 Node Label	Status Reason-{value}
Use Custom Label	Yes
Custom Label	* Deal Status-{value}

Configuration



Outcome

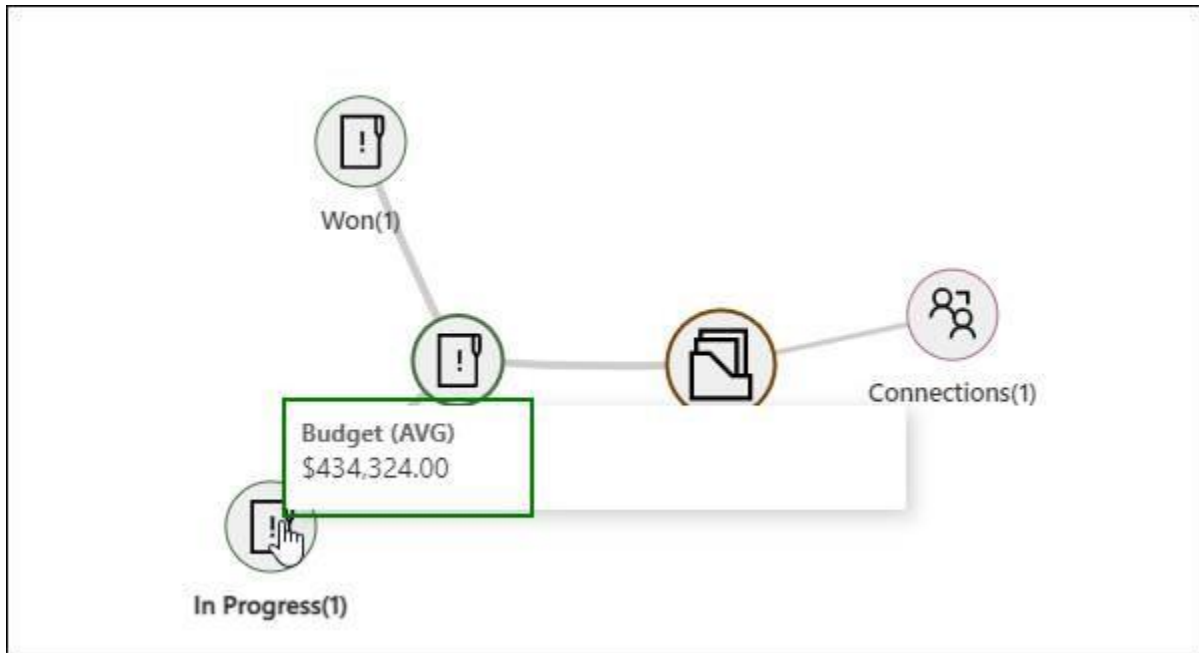
**Note: Adding {value} in Custom Label is mandatory, otherwise the option name will not appear on the group node.**

### 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... x
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

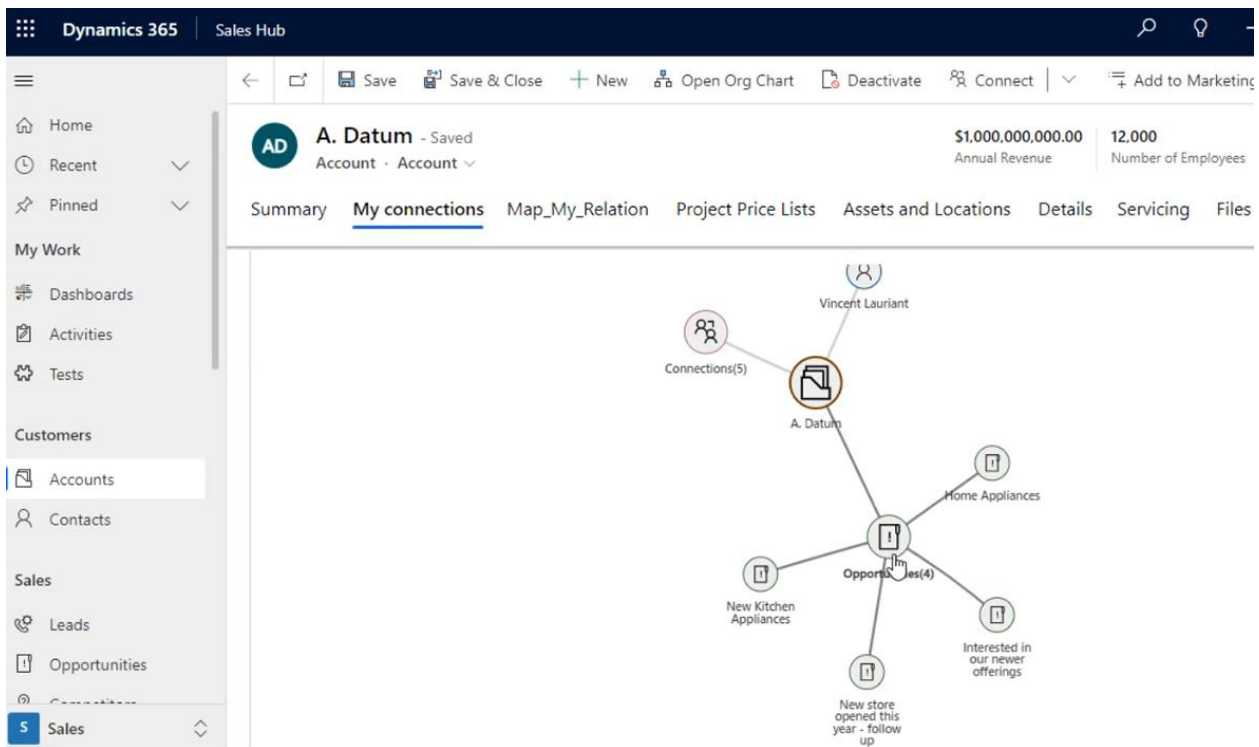
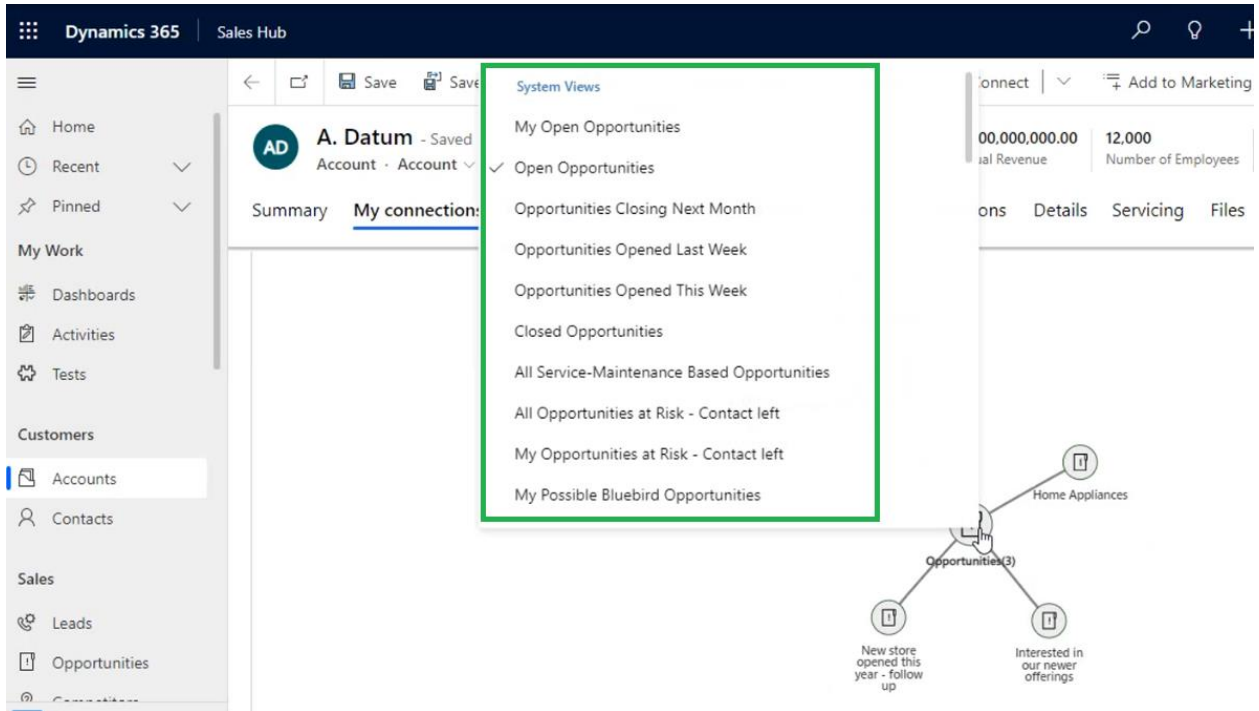
General Related

### Node Settings

Relationship Node Image	Entity Image
Default View Filter	<div style="border: 2px solid green; padding: 5px;"><p>--Select--</p><p>All Sales Team Members</p><p>Related Solutions</p><p>All Stakeholders</p><p>Associated Products</p><p>Active Connections</p><p>Related Territories</p></div>
Allowed Actions	<p>--Select--</p>
View to show fields on Tooltip	<p>--Select--</p>

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

# Map My Relationships – User Manual



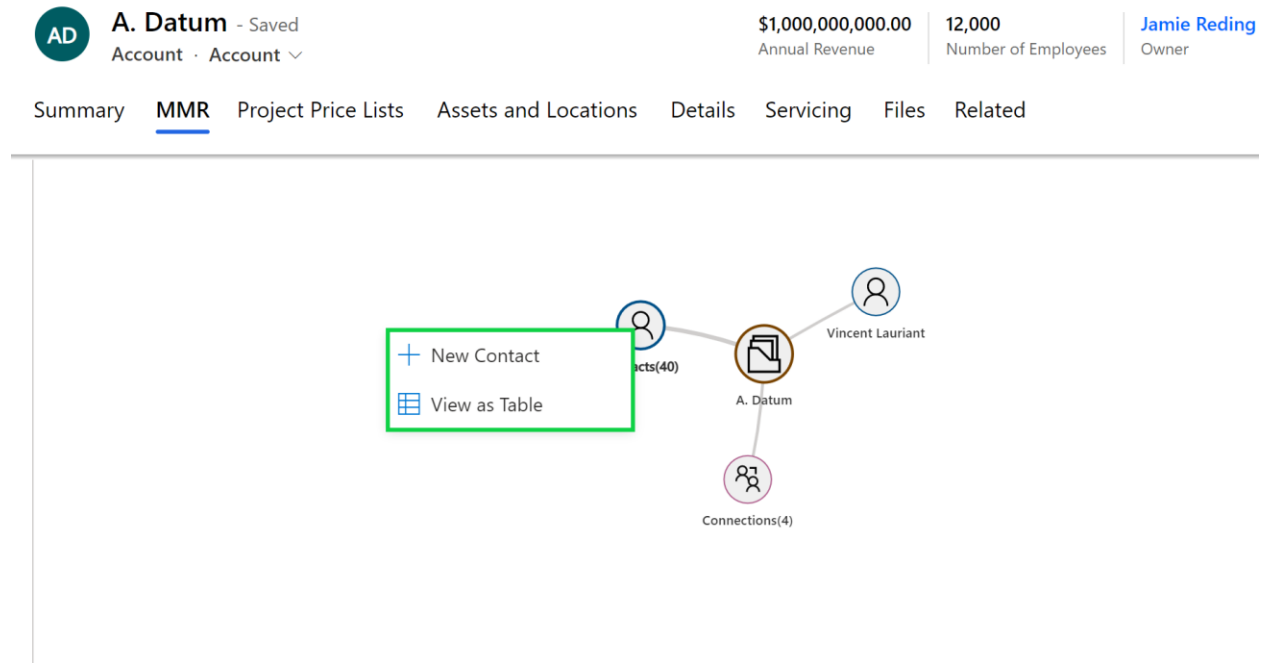
**Note:** This field is available only for One-to-Many and Many-to-Many relationships.

## Read-Only Grid

## Map My Relationships – User Manual

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.

The screenshot displays a grid view titled 'Contacts(40)'. At the top right of the grid is a search bar labeled 'Search this view'. The grid has five columns: 'Full Name', 'Company Name', 'Status', 'Created On', and 'Created By'. The data rows are as follows:

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

At the bottom right of the grid, there is a pagination control showing '← Page 1 →'.

**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.

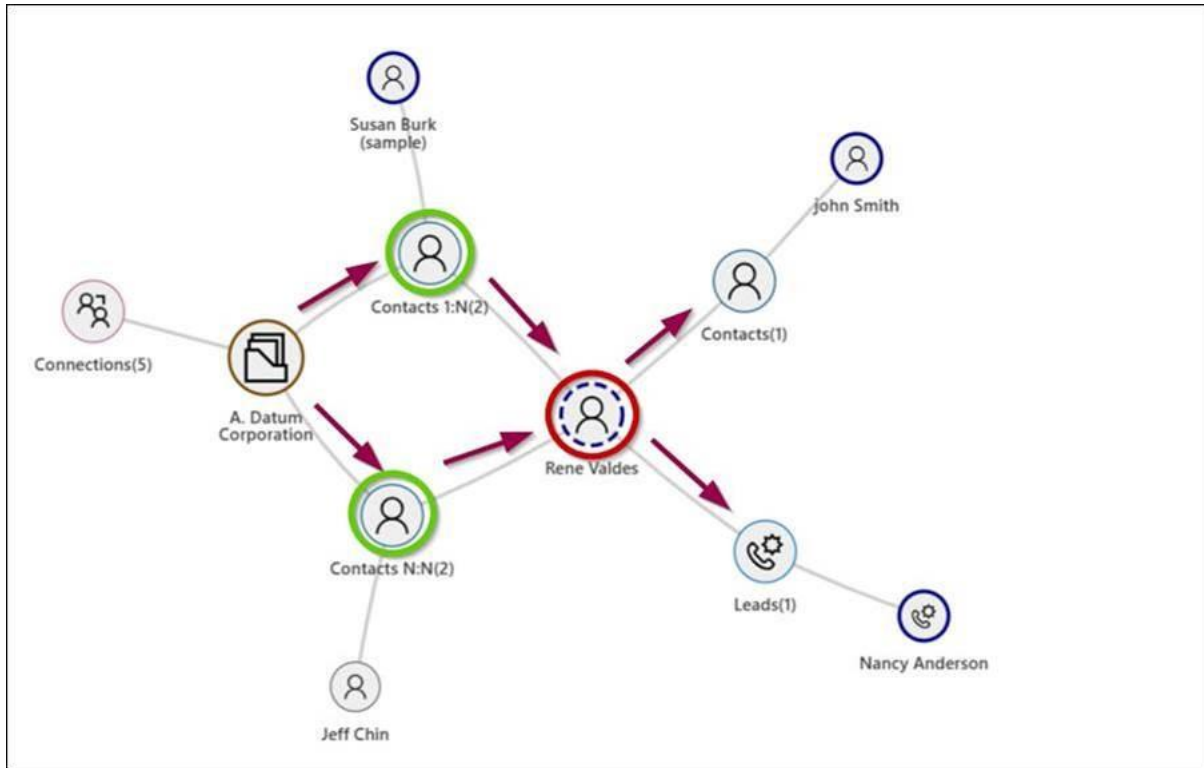
### Tooltip, Drill-Down, and Quick Actions:

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.

---

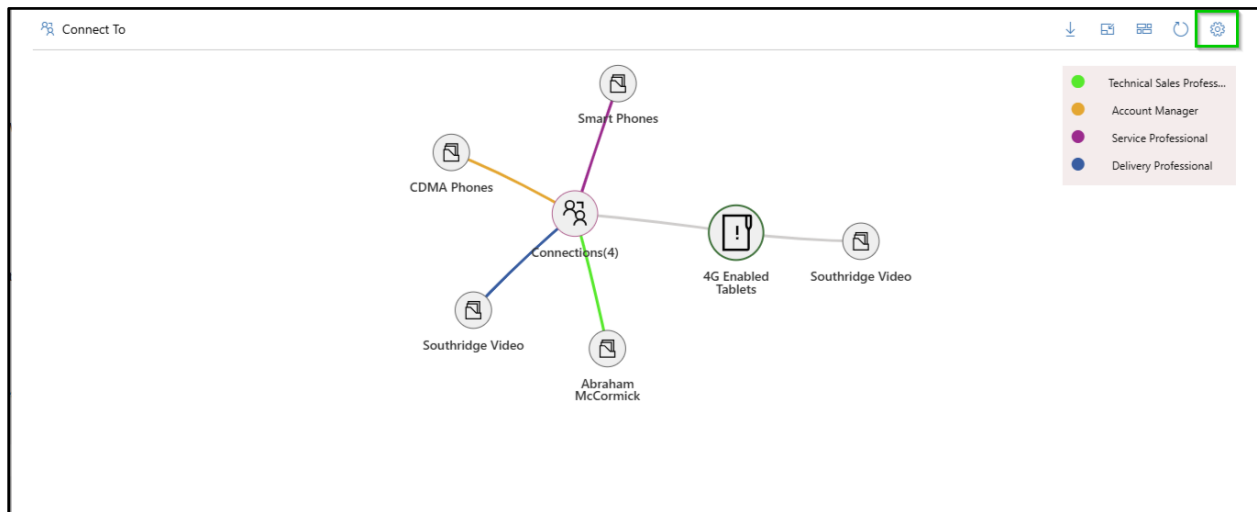
## Color Coded Connection Roles

---

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.

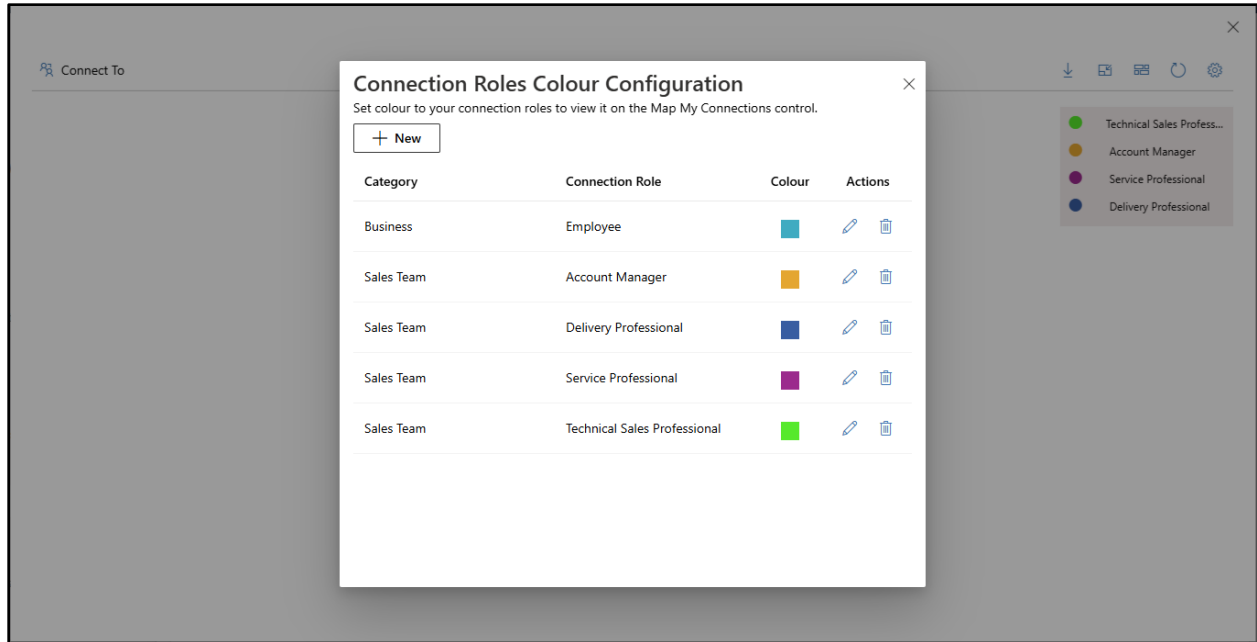


**Note:** The Settings Icon is visible only to users with the **System Administrator** or **MapMyRelationship Administrator** role. Only users with these roles can configure connection role colors.

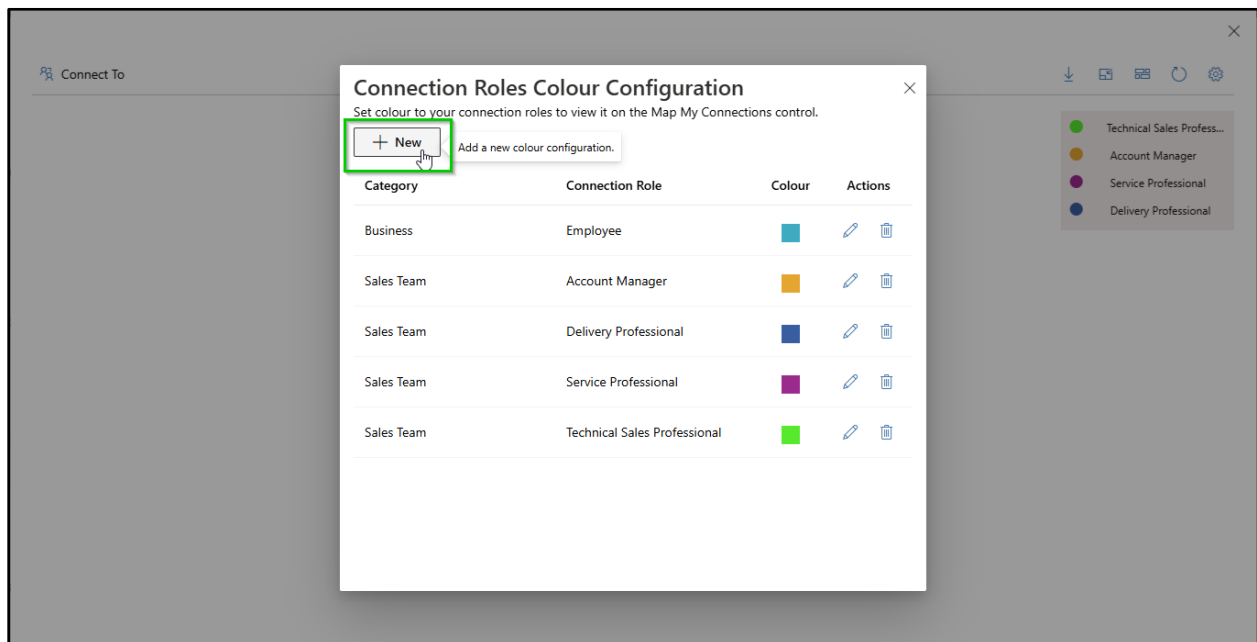
2. After clicking the Settings icon, the configuration interface will appear.



## Map My Relationships – User Manual

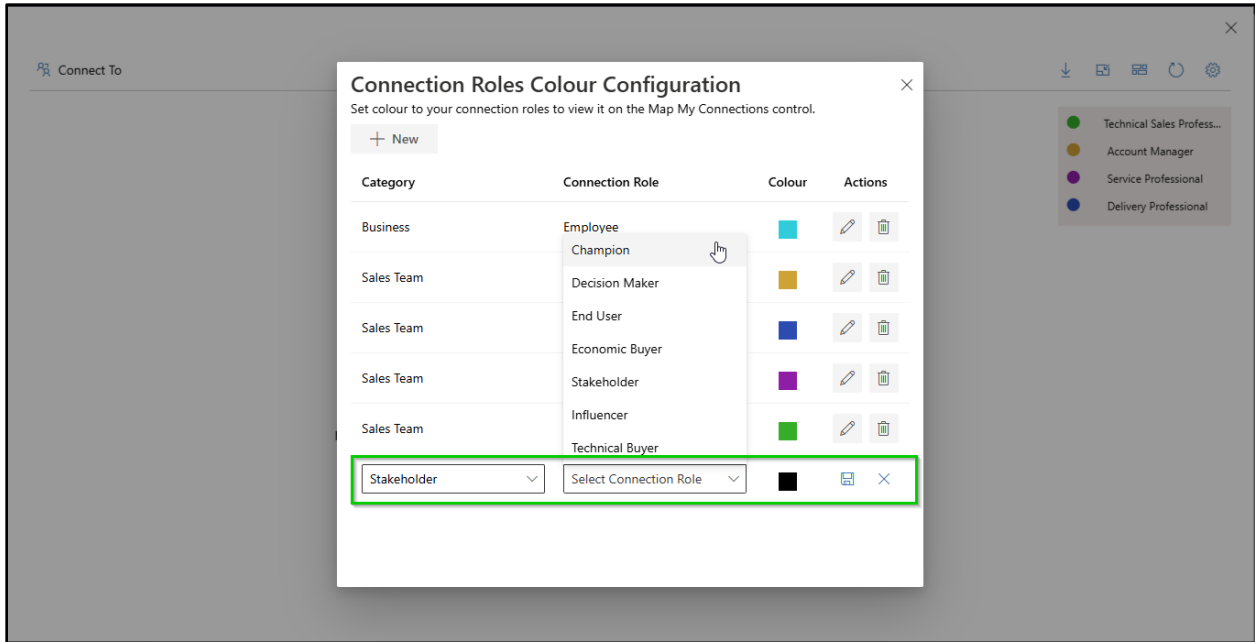


3. To create a new connection role color configuration, click on the **New** button.

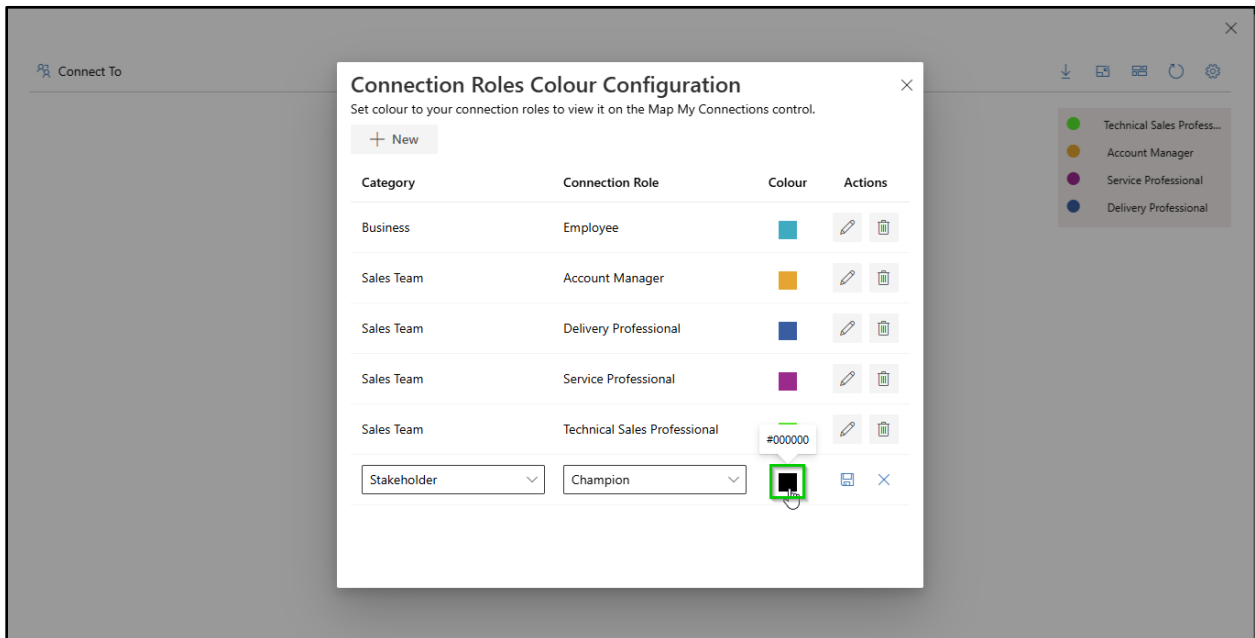


4. Clicking the **New** button will add a new row to the configuration list. In the new row, select the desired **Connection Role Category** from the dropdown menu. Based on the selected category, choose the appropriate **Connection Role** from the dropdown, which will display only the roles available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

## Map My Relationships – User Manual

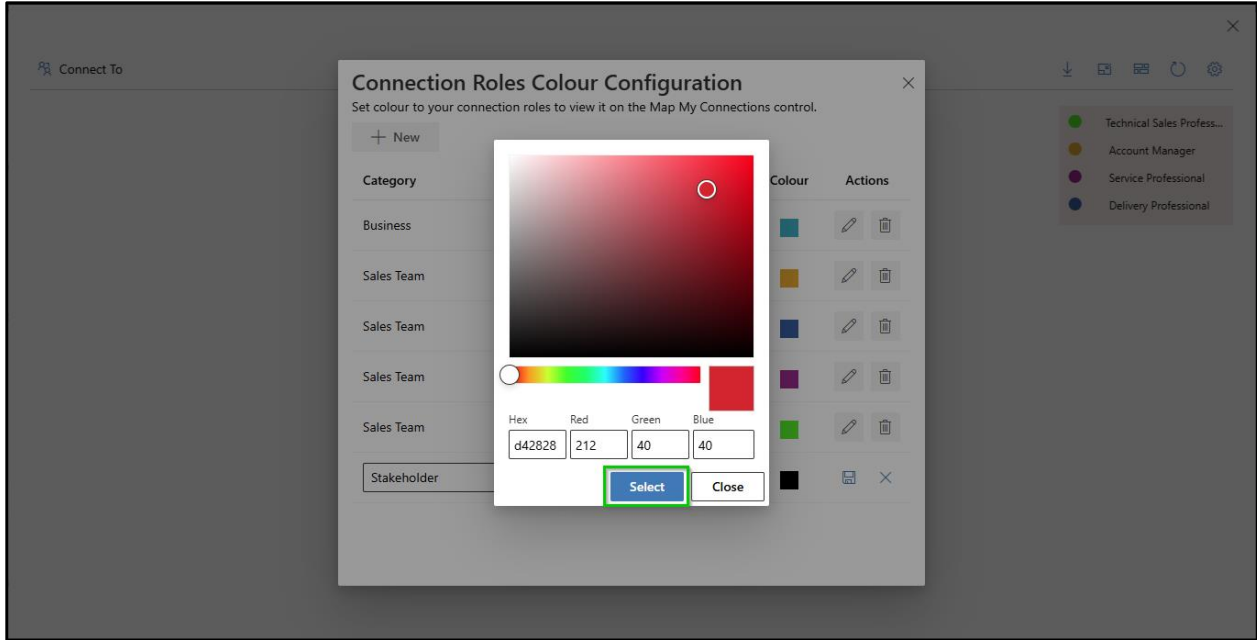


5. Click on the **Color Box** to open the color picker.

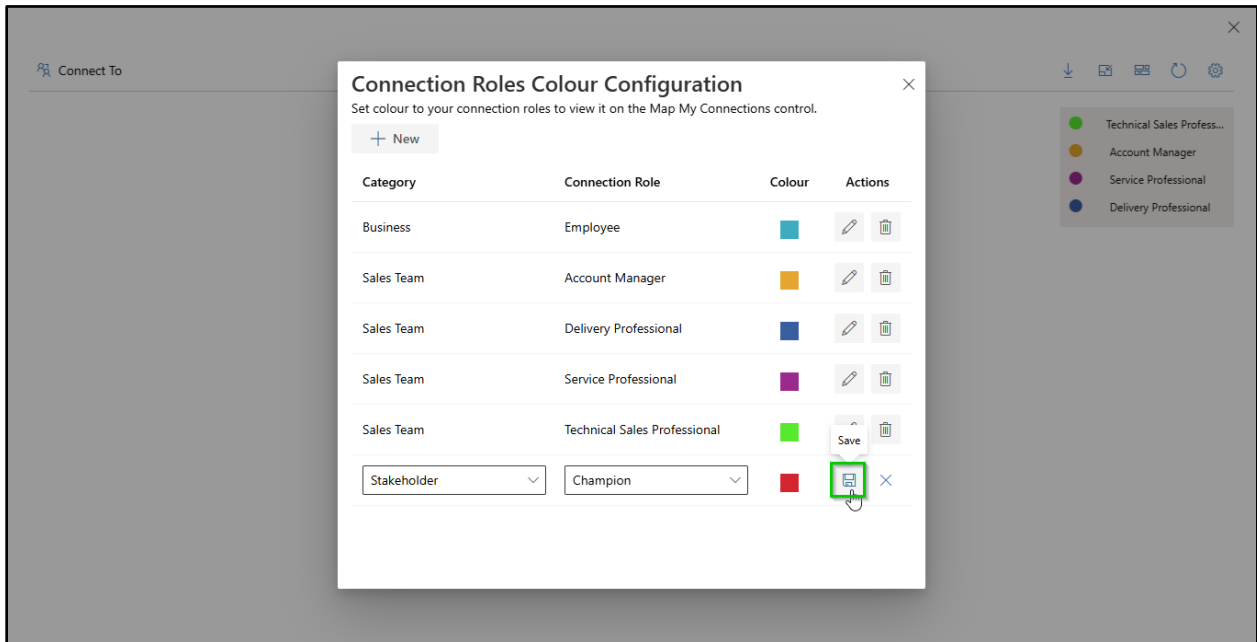


6. Once the color picker appears, select your desired color and click **Select**.  
**Note:** You cannot choose a color that has already been assigned in another configuration.

## Map My Relationships – User Manual

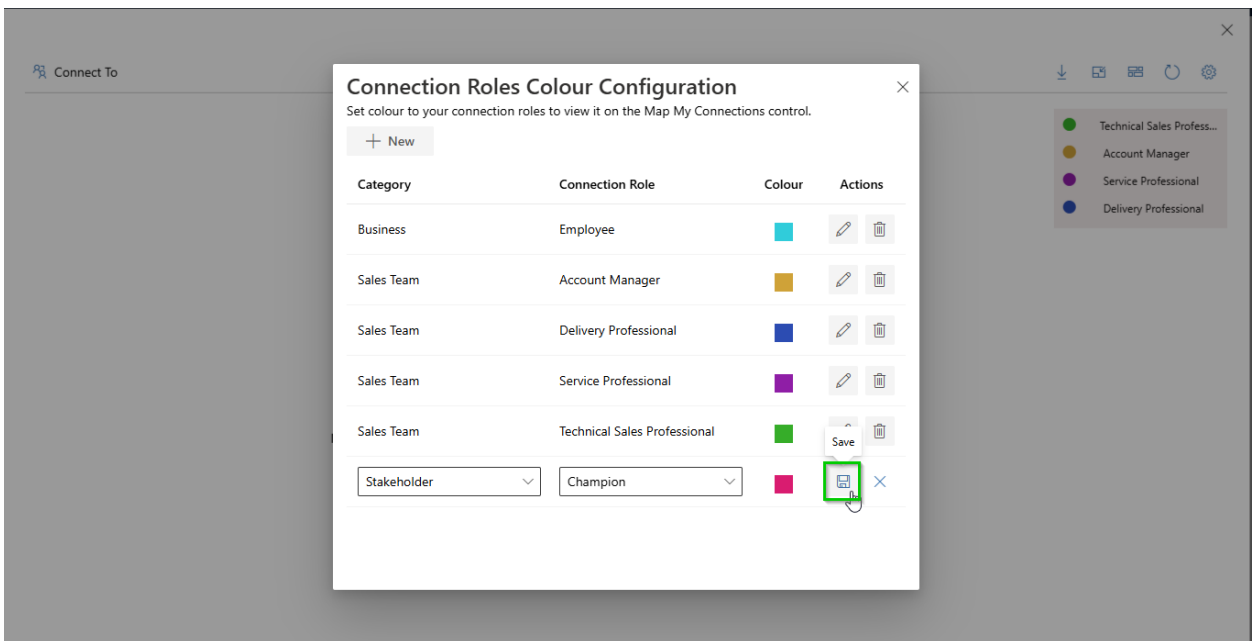
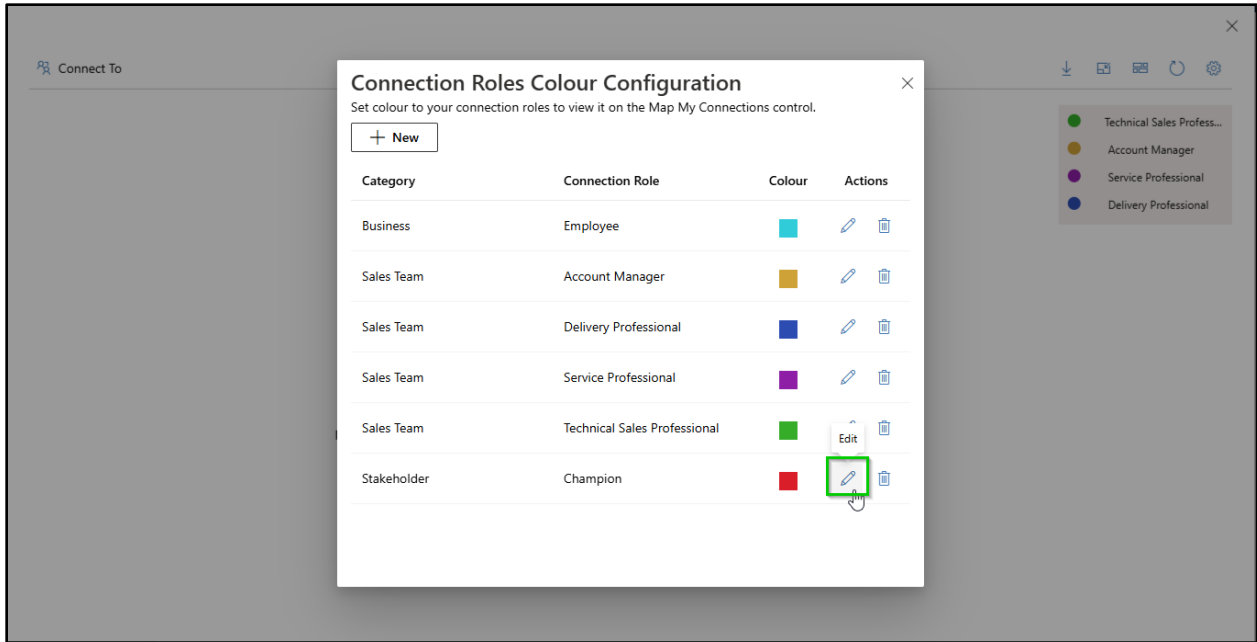


7. After configuring the connection role and its color, click the **Save** button to apply the changes.

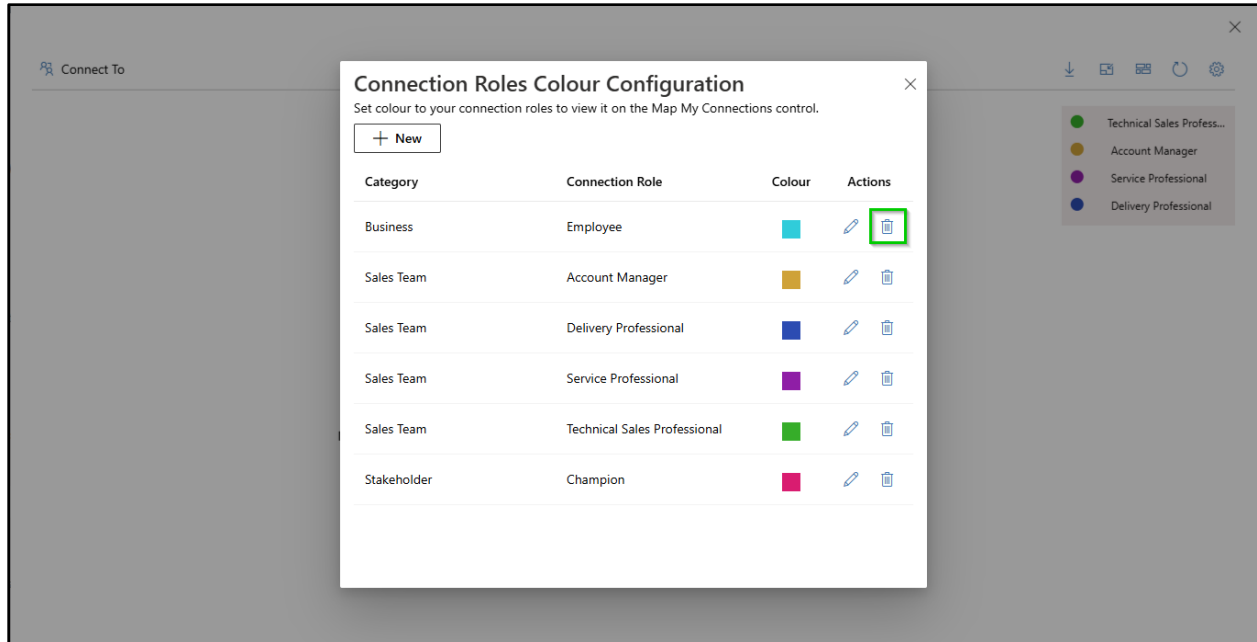


8. To edit an existing configuration, click on the **Edit** button, make the necessary changes, and click **Save**.

## Map My Relationships – User Manual



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

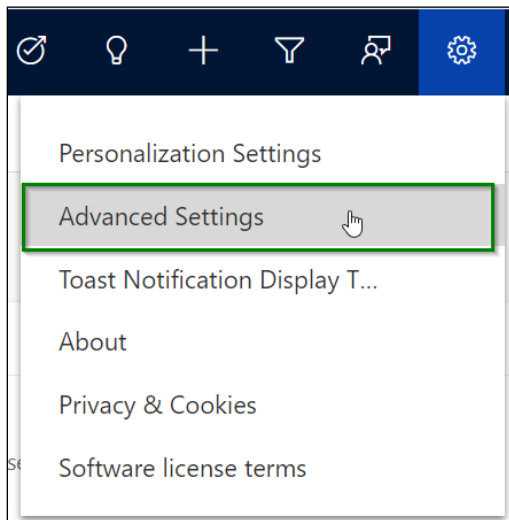
1. **Grid/Relationships View:** To allow user to see the data in grid as well as in relationship view.
2. **Expand relationship view:** To view the connection control in enlarged screen mode.
3. **Grid Refresh:** To refresh the connection control
4. **New connection creation:** These are the necessary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

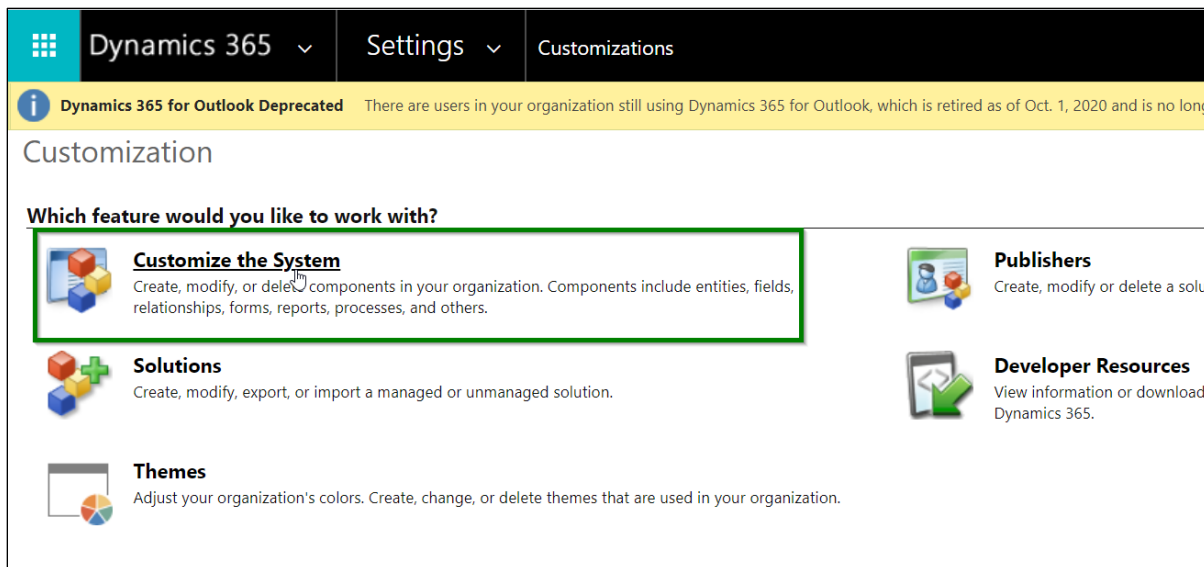
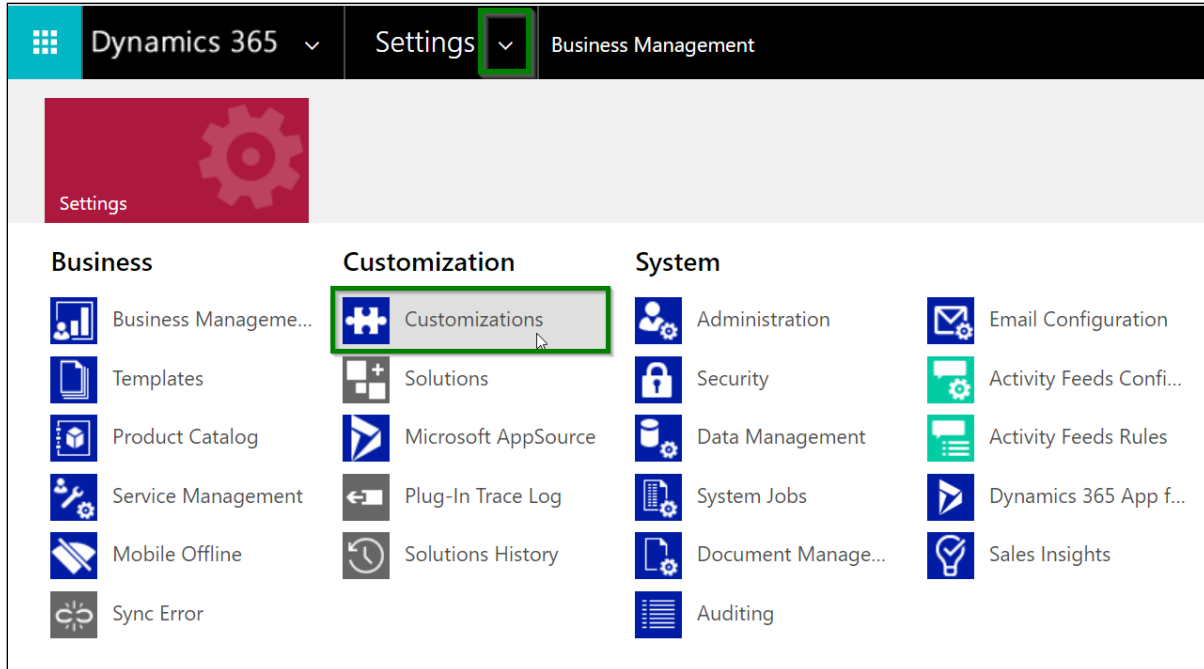
## Steps to configure the connection control

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.

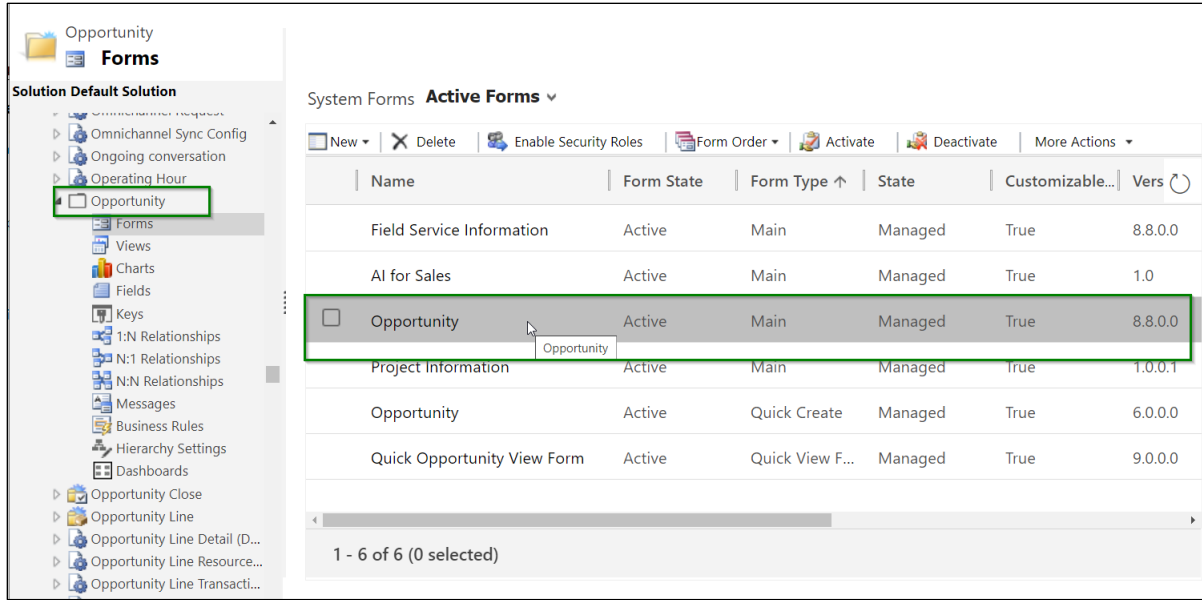
- 1) Go to **Advanced Settings** → **Settings** → **Customizations** → **Customize the System**.





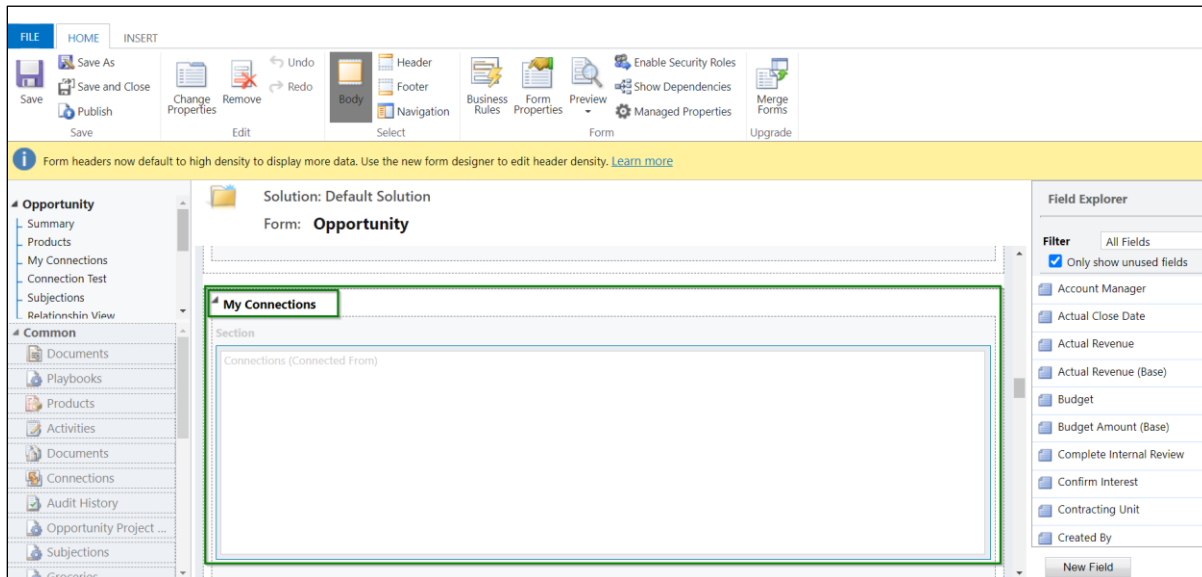
2) Next, under 'Default Solution' select **Opportunity** → **Forms** → **Main Form**.

## Map My Relationships – User Manual



Name	Form State	Form Type	State	Customizable...	Vers
Field Service Information	Active	Main	Managed	True	8.8.0.0
AI for Sales	Active	Main	Managed	True	1.0
<input type="checkbox"/> Opportunity	Active	Main	Managed	True	8.8.0.0
Project Information	Active	Main	Managed	True	1.0.0.1
Opportunity	Active	Quick Create	Managed	True	6.0.0.0
Quick Opportunity View Form	Active	Quick View F...	Managed	True	9.0.0.0

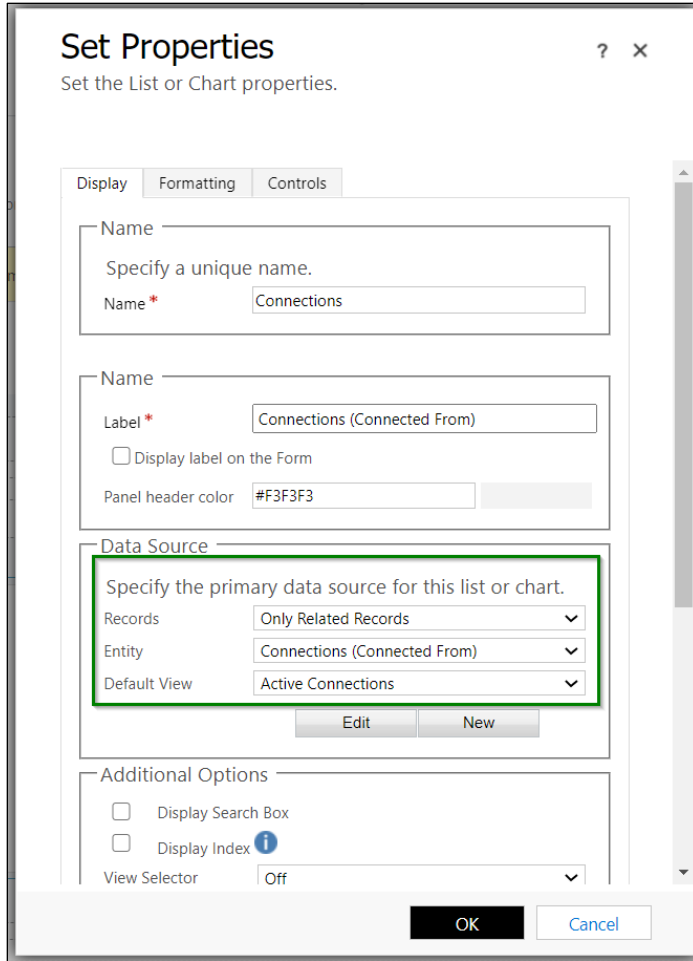
3) Now add a **sub-grid** on the form (You can add a sub-grid with one column for a better view).



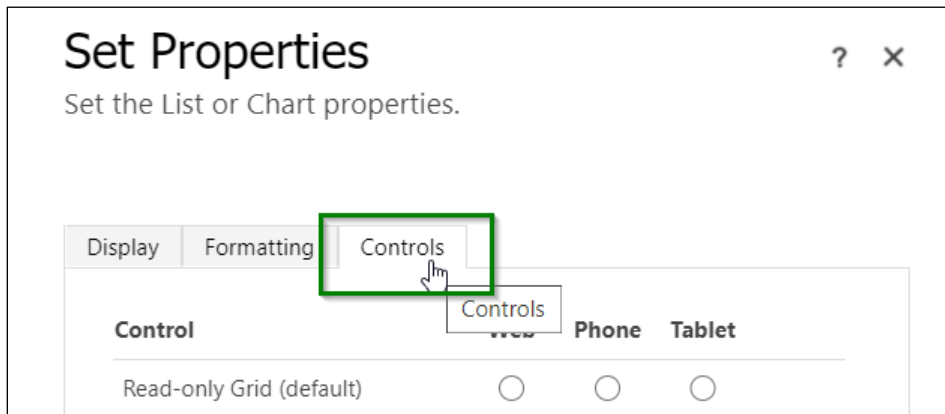
The screenshot shows the CRM form designer interface. The ribbon at the top includes options like Save, Undo, Redo, Header, Footer, Navigation, Business Rules, Form Properties, Preview, Show Dependencies, Managed Properties, Merge Forms, and Upgrade. The main workspace shows the 'Opportunity' form with a sub-grid titled 'My Connections' added. The sub-grid is currently empty and is highlighted with a green border. The field explorer on the right lists various fields such as Account Manager, Actual Close Date, Actual Revenue, Budget, and Created By.

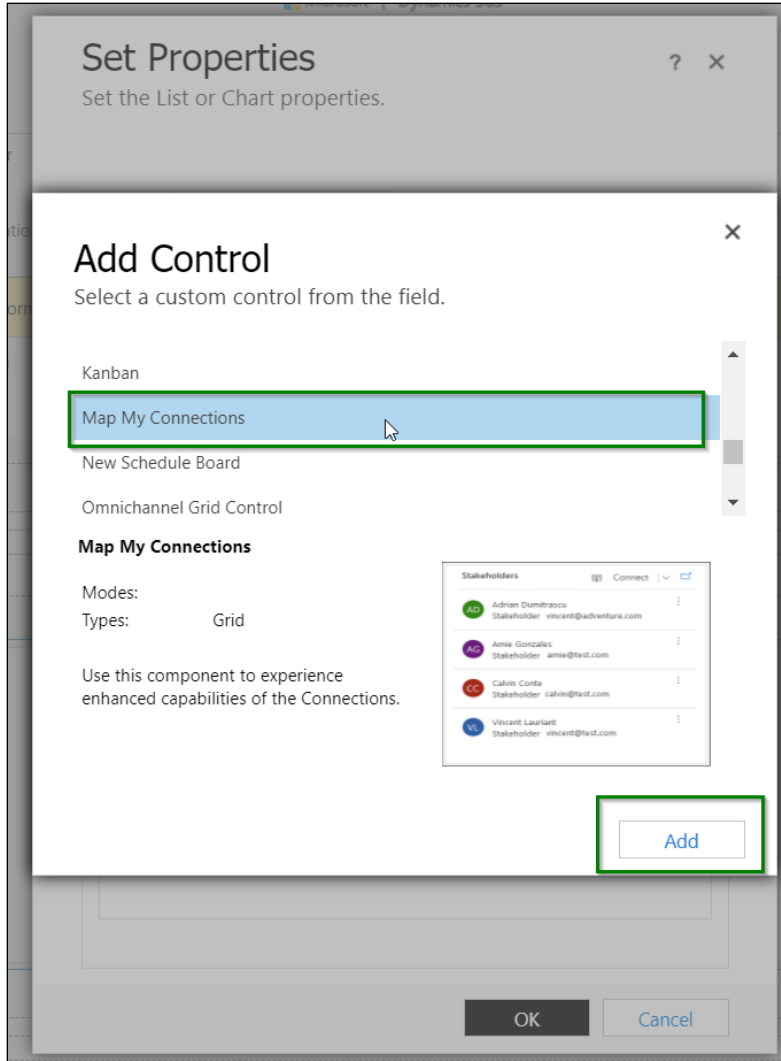
4) Set the properties of sub-grid as shown below:



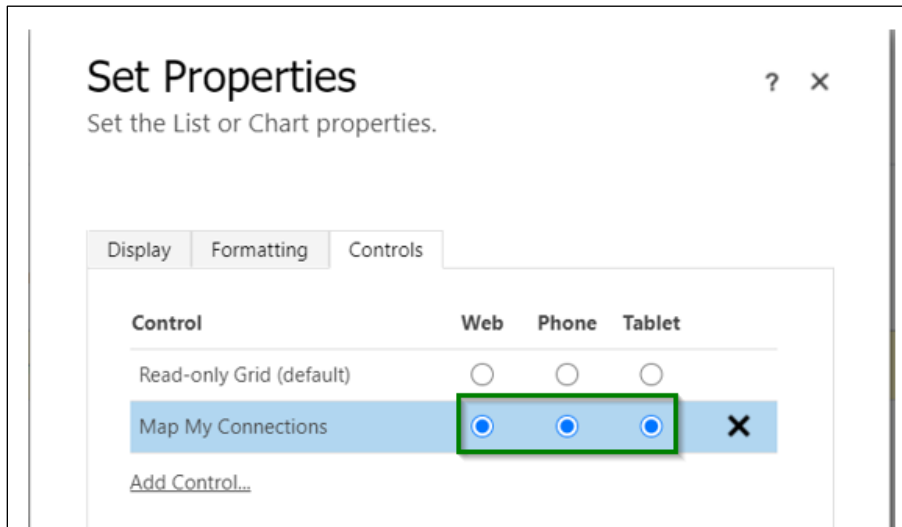


5) Now go to 'Controls' and add 'Map My Connections' control.





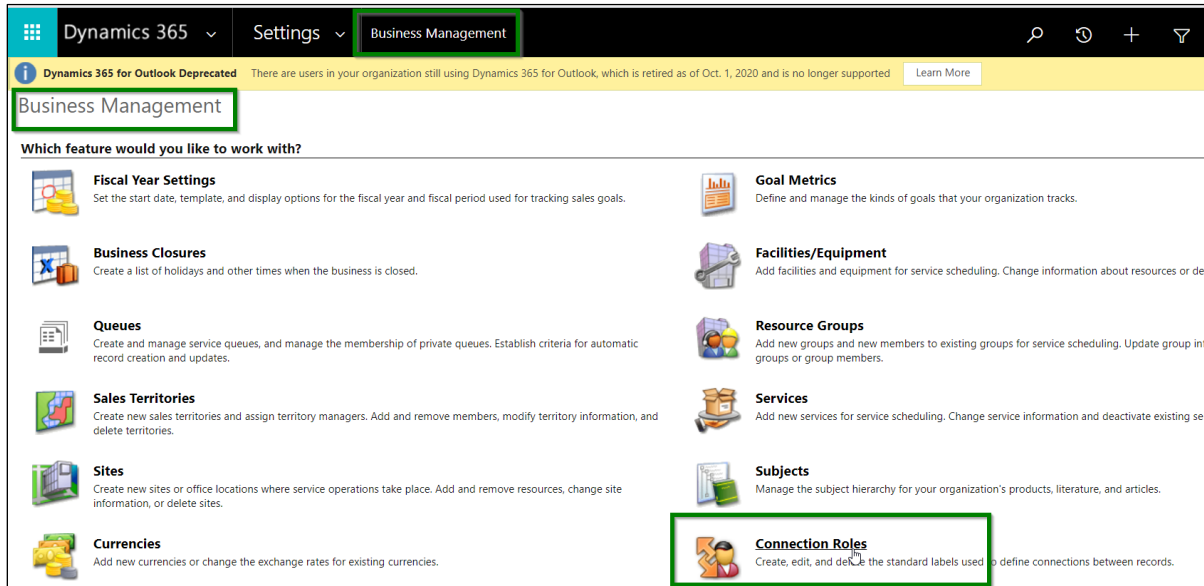
6) Enable the control so that you can see it on all three: **Web, Phone and Tablet**.



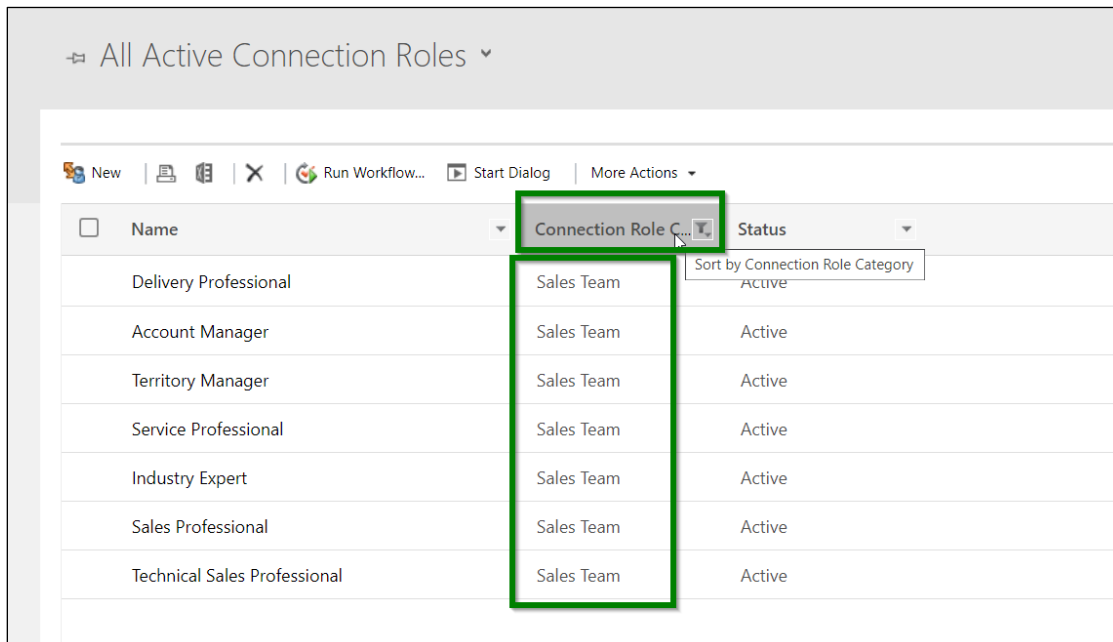
7) Next, let's set the parameters for the control.

**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).

**Configure Property "Allowed Role ..."**

**Bind to a static value**

Multiple Sales Team,Business,Family

**Bind to a value on a field**

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

OK Reset

**Set Properties**

Set the List or Chart properties.

Display Formatting Controls

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

Add Control...

Map My Connections

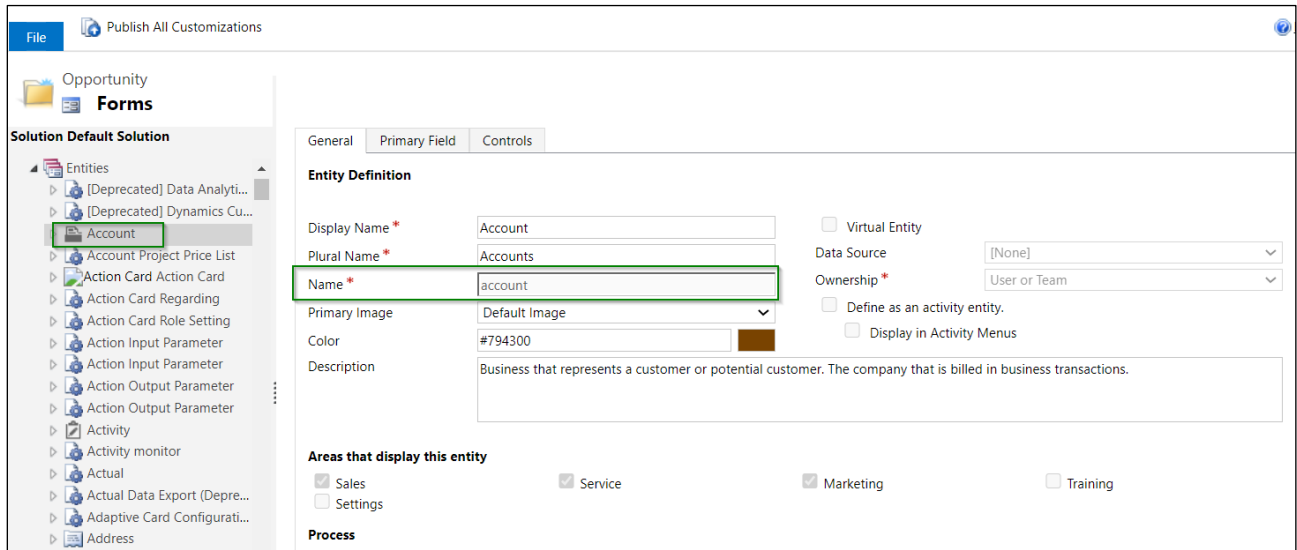
Property	Value
Dataset_Display_Key	Active Connections
Allowed Role Categories	Sales Team,Business,Family (...)
Allowed Entities	account (Multiple)
Default Control	0 (SingleLine.Text)
Map My Relationship ...	Opportunity (SingleLine.Text)

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

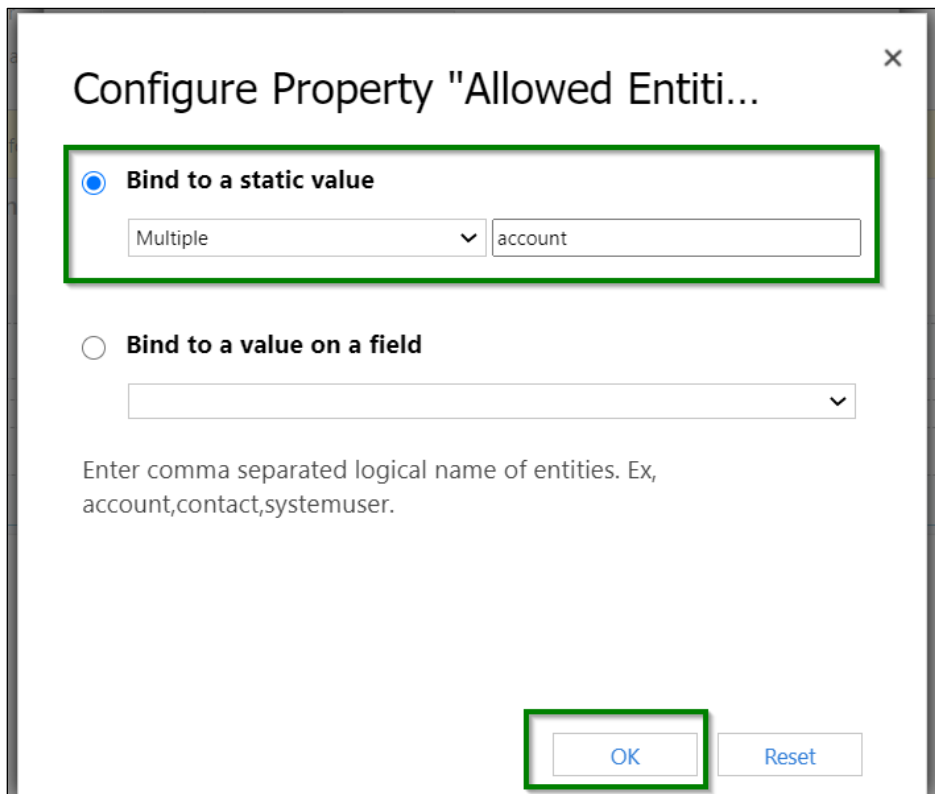
OK Cancel

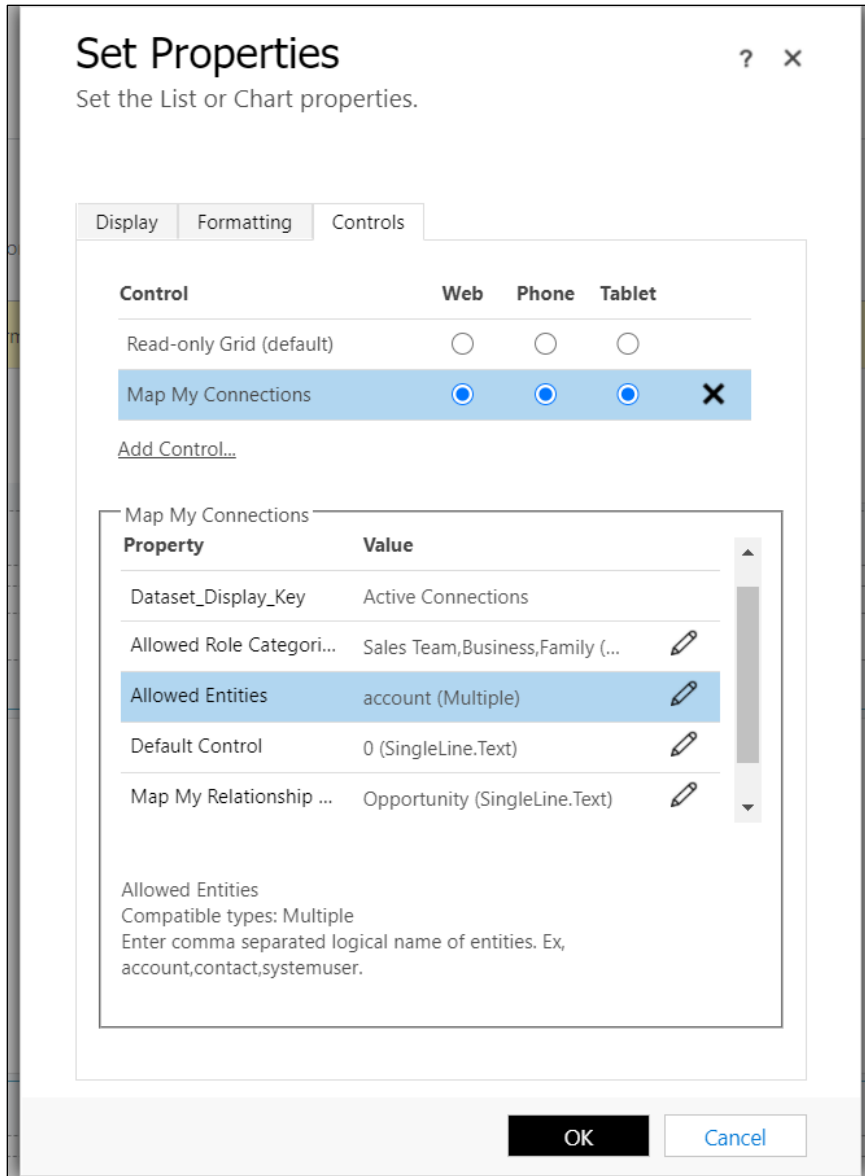
**Allowed Entities:** The entities that you put here will list out under **'Select Entity'** on the **'Create Connection'** form while adding a connection to the opportunity. This will allow user to connect the record of only these mentioned entities to the opportunity. You will need to make sure to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

You can see the logical name of an entity here -



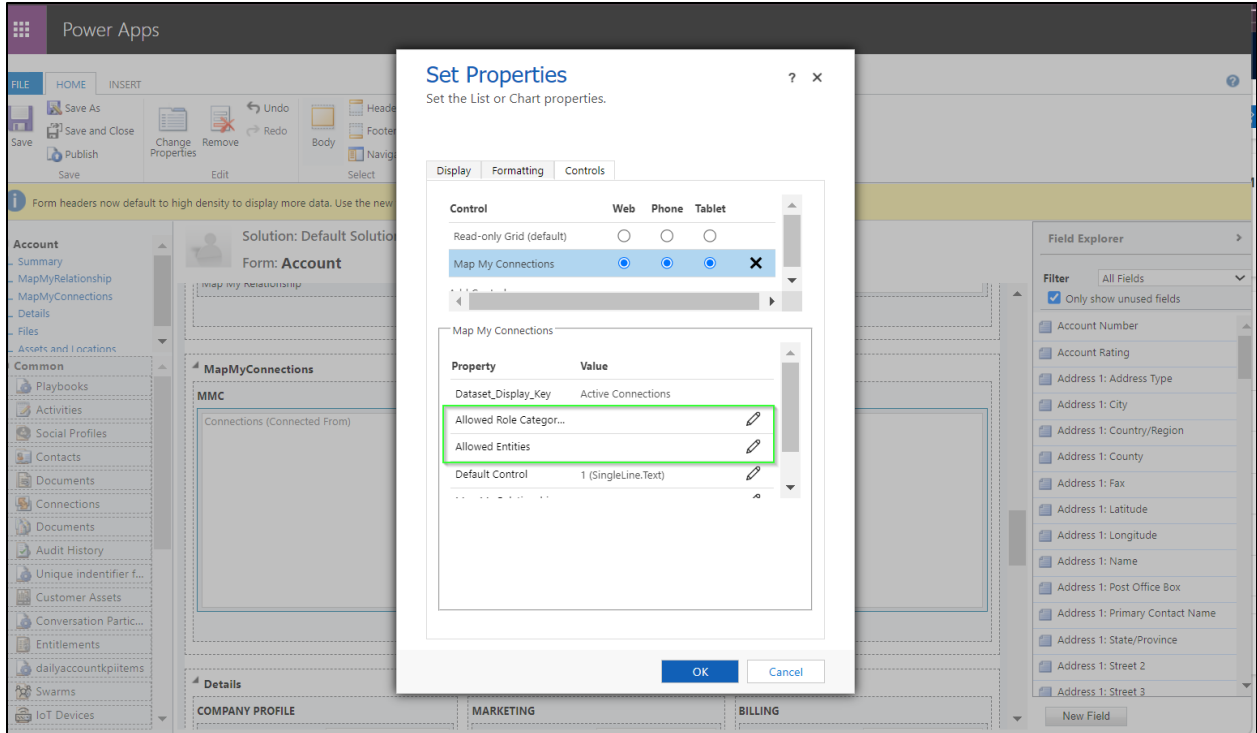
Here, we will enter **'account'** entity.





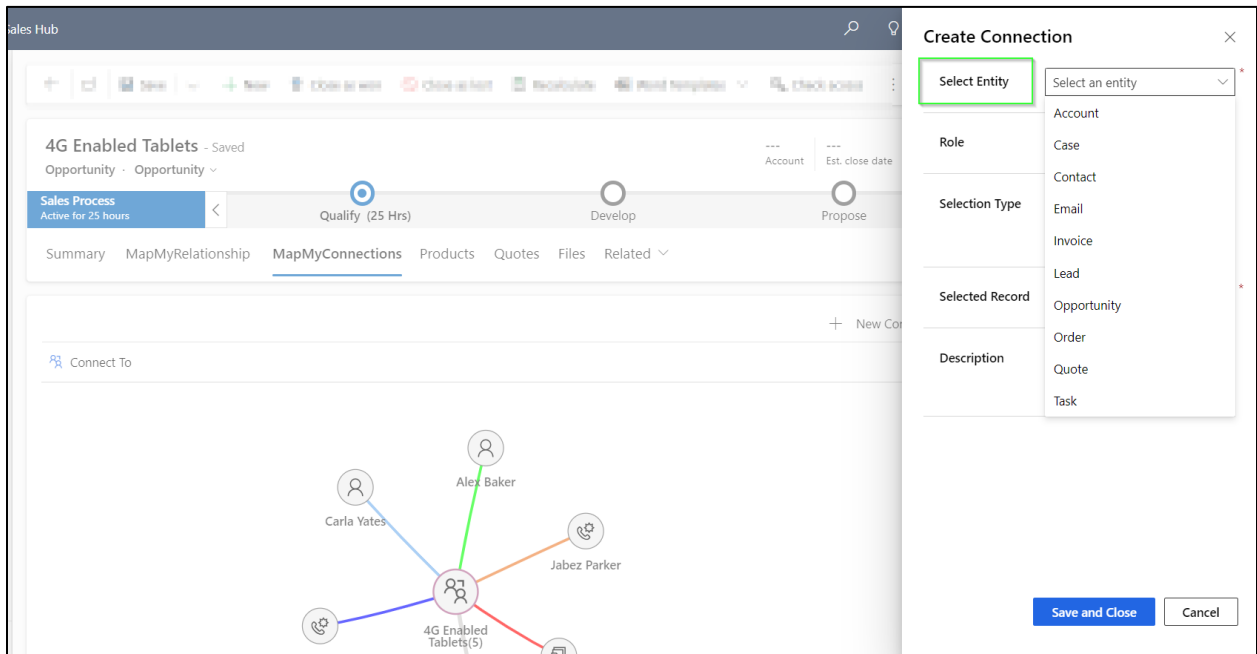
If no specific **Allowed Role Categories** or **Entities** are defined in the **Map My Connections** control.

# Map My Relationships – User Manual

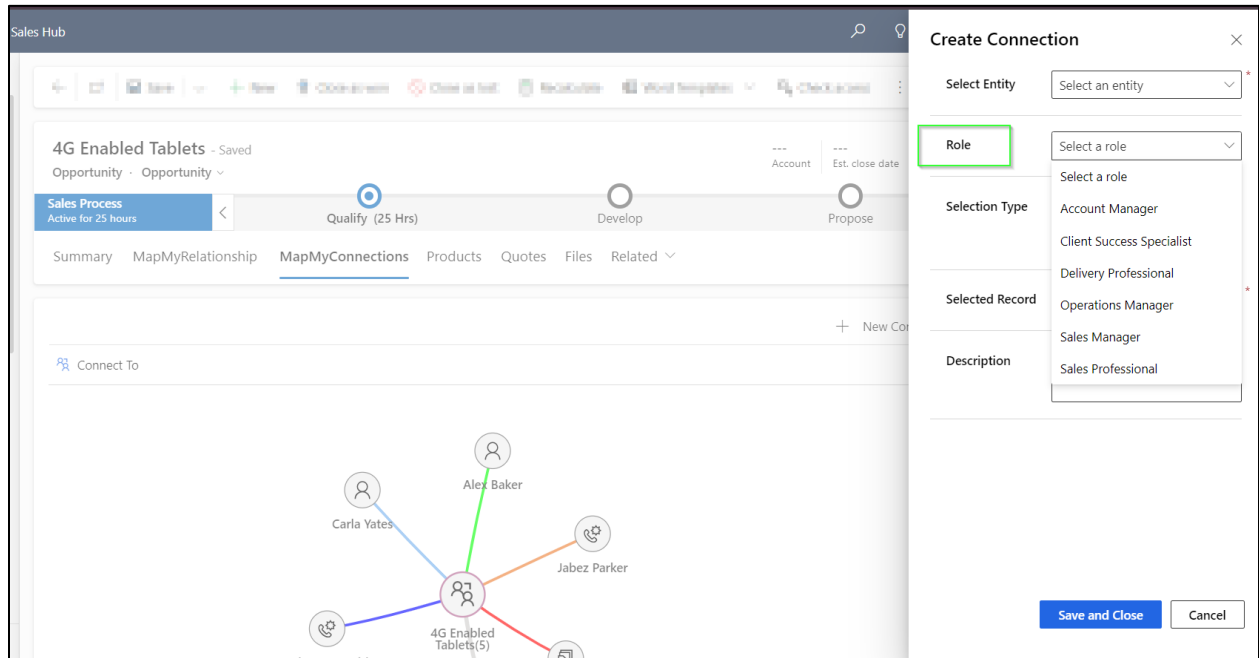


The system will display all roles and entities by default when creating a connection. As shown in the screenshots below:

## Entities:



**Roles:**

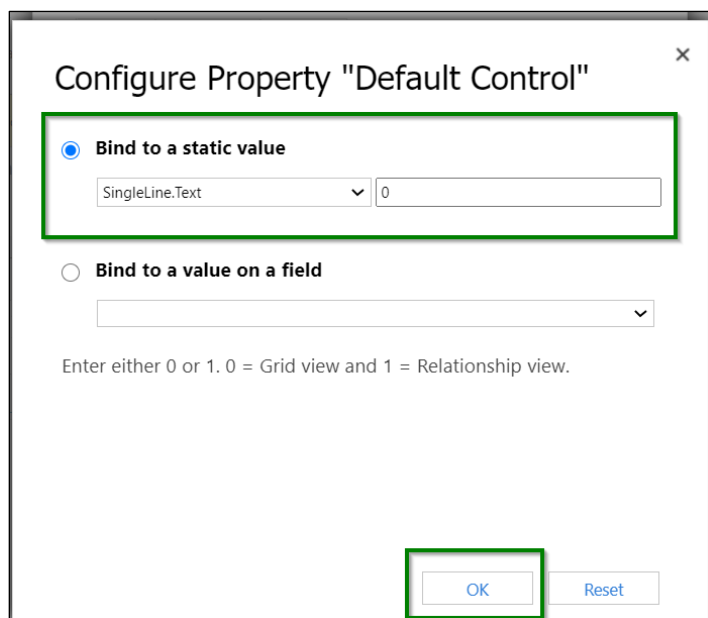


**Default Control:** You will need to set this field as either **0** or **1**.

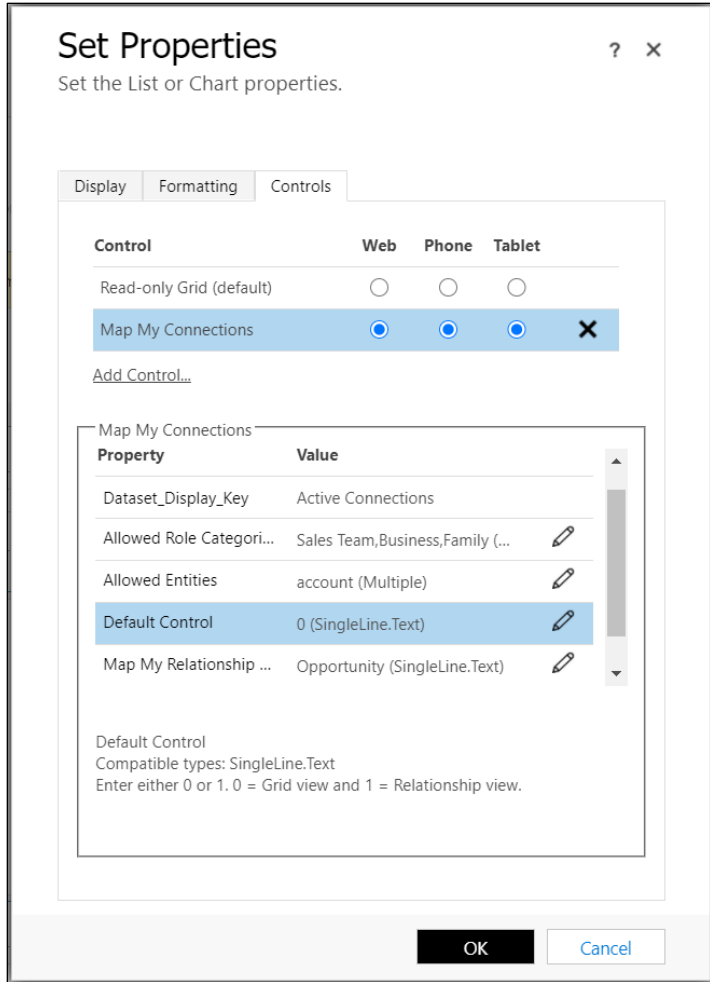
**0** = Default view would be **'Grid'** view.

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

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

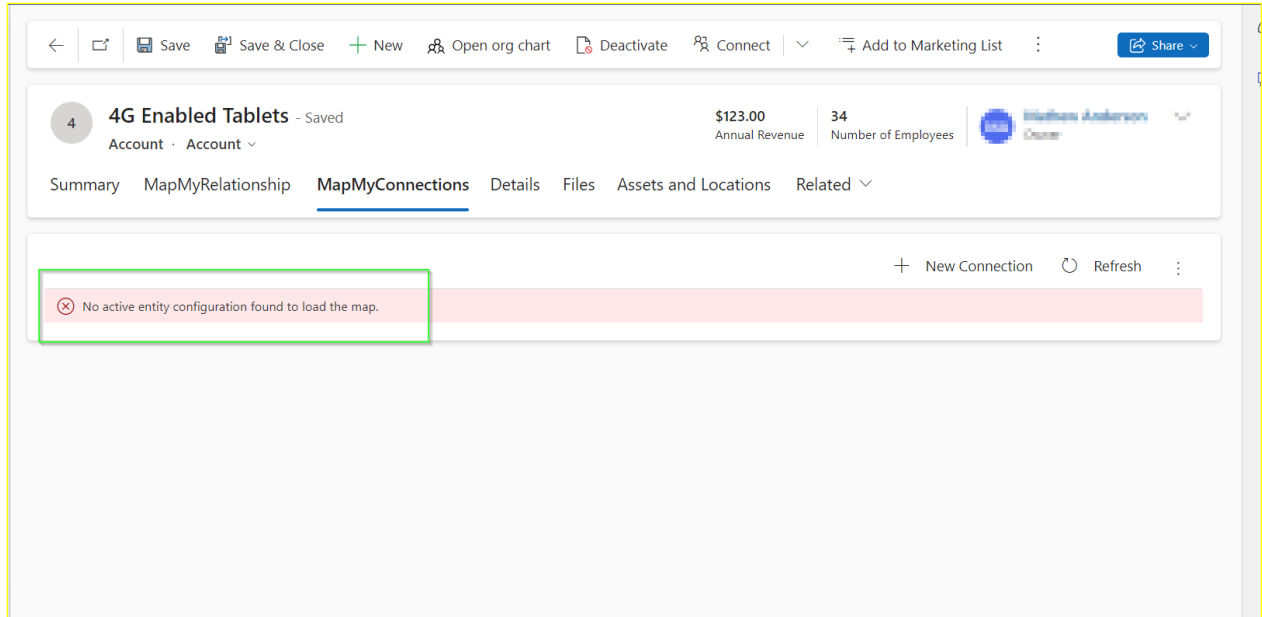






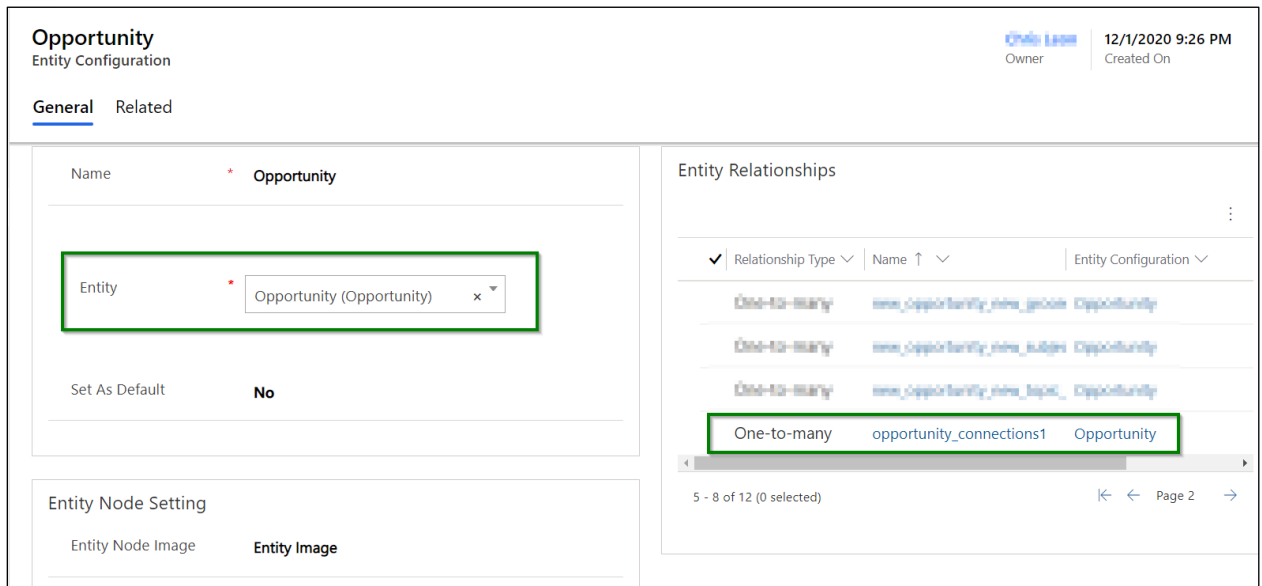
**Map My Relationship Control Configuration:** It is mandatory for user to enter the name of Map My Relationship configuration if the user wishes to see the connections in the **relationship view** through the connection control. So, despite having the Map My Relationship configuration in the system, 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.

## Map My Relationships – User Manual



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:–

## Map My Relationships – User Manual

**opportunity\_connections1**  
Entity Relationship

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

**General** | Related

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

Relationship \* opportunity\_connections1(con... x

Entity Configuration \* **Opportunity**

Use Default Configuration **Yes**

Node Settings

Allowed Actions: x Appointment (Appointment)

View to show fields on Tooltip: Active Connections x

Cluster Settings

Group By: Type (To) (record2objecttypec... x

Measure: --Select--

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

**Configure Property "Map My Relati..."**

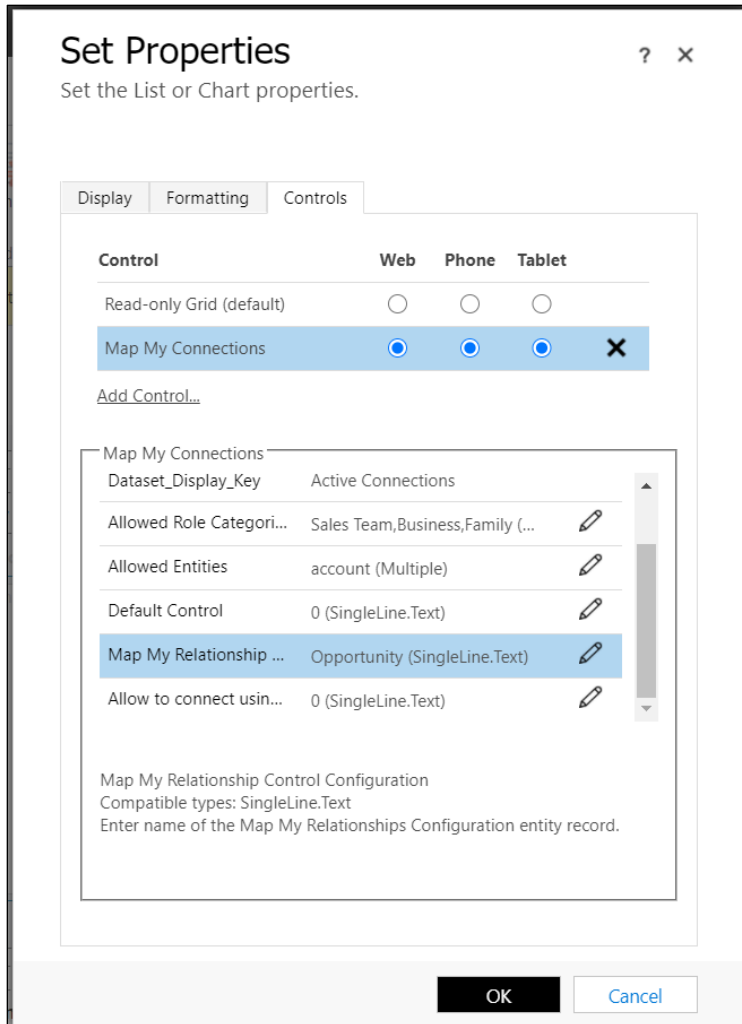
**Bind to a static value**

SingleLine.Text | Opportunity

**Bind to a value on a field**

Enter name of the Map My Relationships Configuration entity record.

**OK** | Reset



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

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

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

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

**Entity configuration:-**

**Opportunity**  
Entity Configuration

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

[Create Item](#)

**General** | Related

---

Name \* **Opportunity**

---

Entity \* Opportunity (Opportunity) x

---

Set As Default **No**

---

Entity Node Setting

Entity Node Image **Entity Image**

Entity Relationships

✓ Relationship Type ▾
Name ↑ ▾
Entity Configuration ▾

Many-to-many	new_new_classification_oppo	Opportunity
Many-to-one	new_new_electronic_oppo	Opportunity
Many-to-many	new_new_sport_opportunity.	Opportunity
One-to-many	new_opportunity_new_appro	Opportunity

1 - 4 of 12 (0 selected) | Page 1

**Few more relationships:-**

Entity Relationships

✓ Relationship Type ▾
Name ↑ ▾
Entity Configuration ▾

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

5 - 8 of 12 (0 selected) | Page 2

**Further few relationships:-**

Entity Relationships		
Relationship Type	Name	Entity Configuration
Many-to-one	opportunity_customer_accou	Opportunity
One-to-many	opportunity_invoices	Opportunity
Many-to-one	opportunity_parent_contact..	Opportunity
One-to-many	opportunity_quotes	Opportunity

9 - 12 of 12 (0 selected) Page 3

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

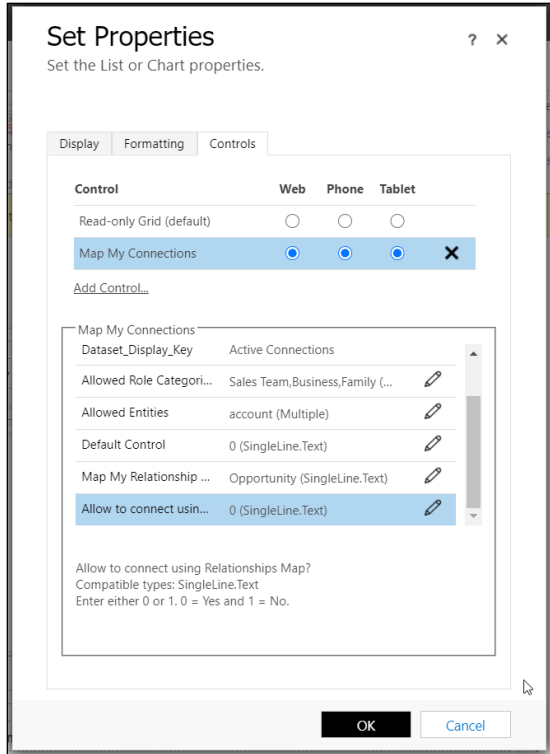
### Configure Property "Allow to conn..."

**Bind to a static value**

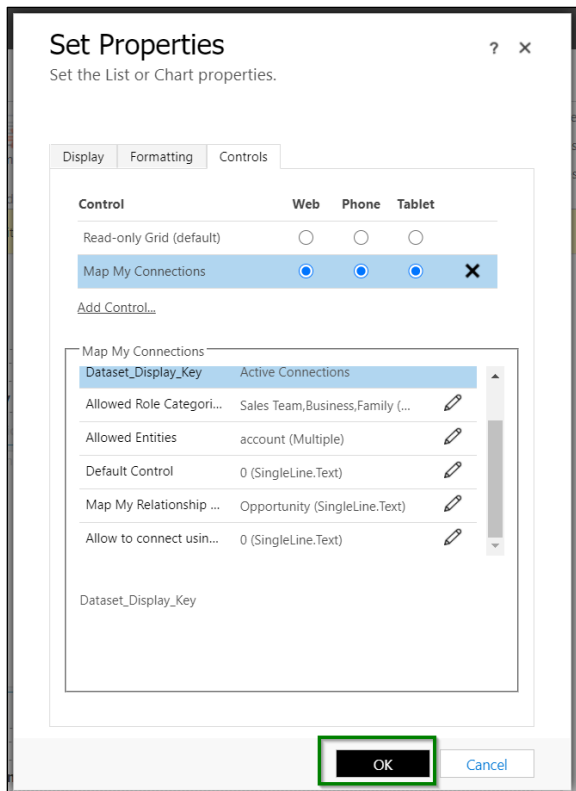
SingleLine.Text    0

**Bind to a value on a field**

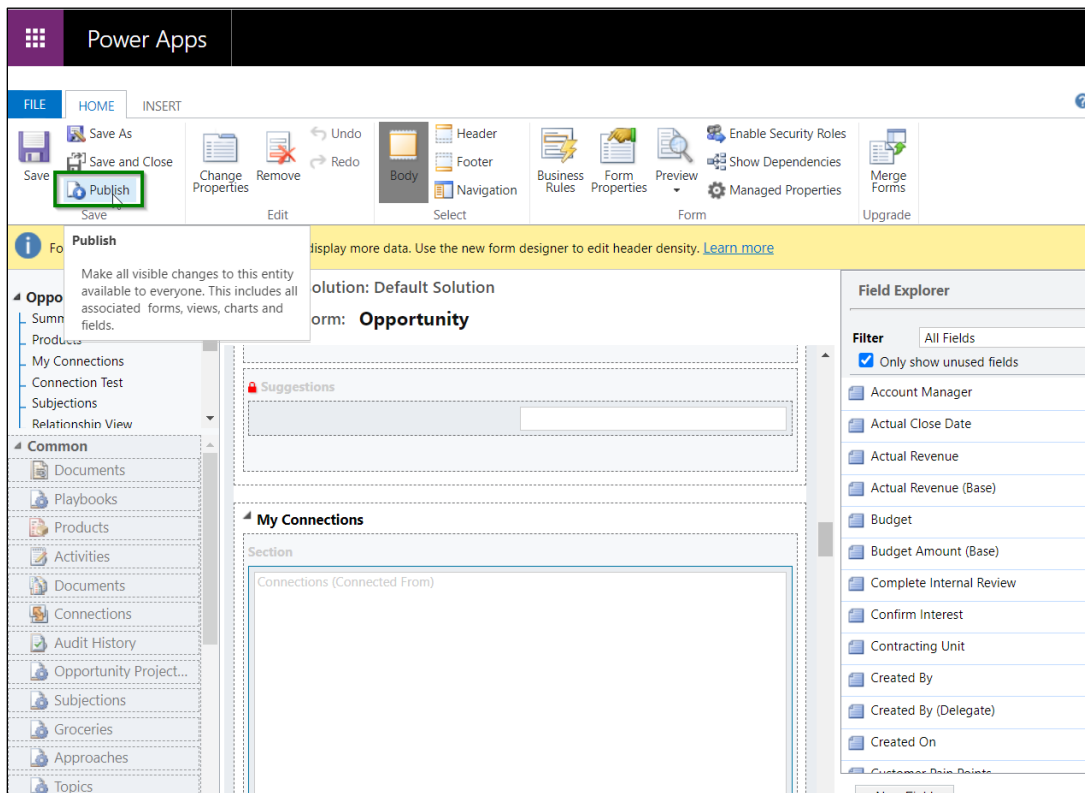
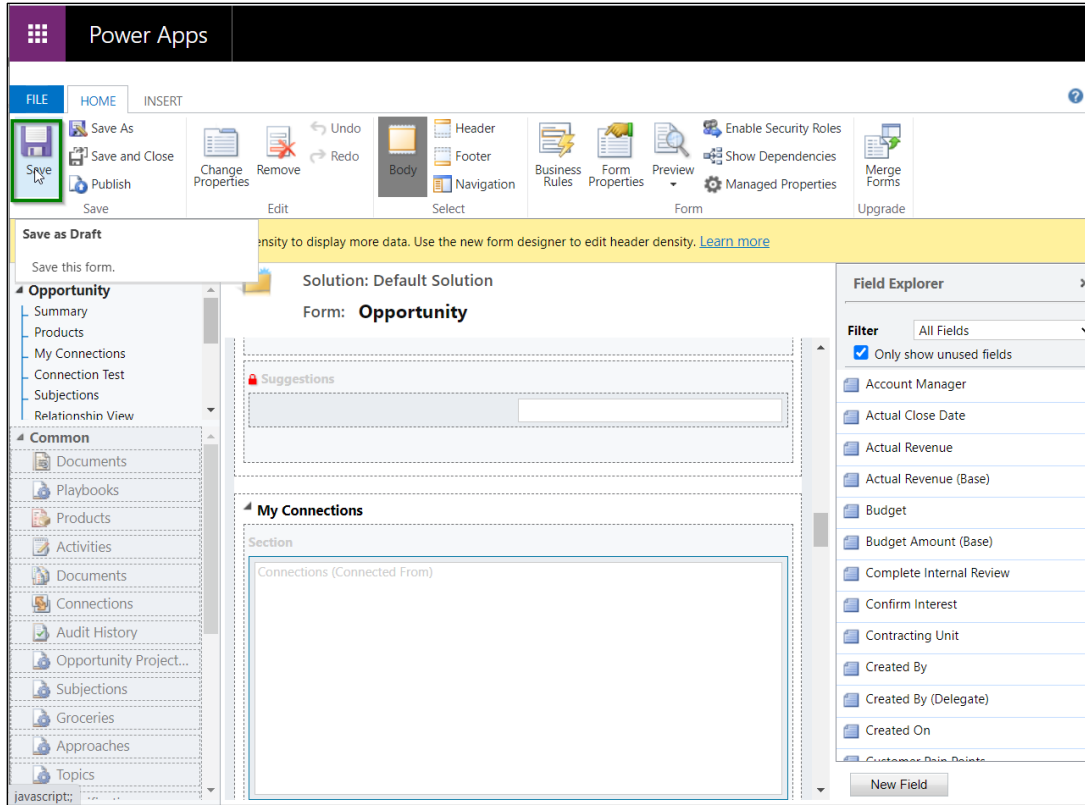
Enter either 0 or 1. 0 = Yes and 1 = No.



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



# Map My Relationships – User Manual





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

**4G Enabled Tablets**  
Opportunity · Opportunity ▾

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

**Opportunity Sales Process**  
Active for 17 days

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

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

Topic\*  
**4G Enabled Tablets**

Contact  
Steve Smith

Account  
Southridge Video

Purchase Timeframe  
This Quarter

Currency\*

**Timeline**

Search timeline

Enter a note...

- CL** Task modified by Chris Leon  
Dynamics Invoice Task  
Active | 11/30/2020 1:07 PM ▾
- SL** Task completed by Spencer Low (Sample Data)  
Send Email  
Follow up with relevant products  
Closed | 11/23/2020 8:49 AM ▾

Assistant  
No notifications  
Check back later to see new notifications

Stakeholders

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

**4G Enabled Tablets**  
Opportunity · Opportunity ▾

3/6/2017 Est. Close Date

**Opportunity Sales Process**  
Active for 17 days

Qualify | Develop | **Propose**

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

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

**Active Connection Associated View** ▾

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

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

## Map My Relationships – User Manual

4G Enabled Tablets - Saved  
Opportunity · Opportunity ▾

Account Est. close date Est. revenue Matthew Anderson

Sales Process Active for 20 hours

Qualify (20 Hrs) Develop Propose Close

Summary MapMyRelationship **MapMyConnections** Products Quotes Files Related ▾

+ New Connection Refresh Flow ▾

Connect To

Connected To ↑	Role (To)	Description
Alex Baker	Former Employer	fields define the nature and context of each connection within your network
Alex Simmon	Employer	helps users categorize and manage relationships more effectively, making it easier to understand each entity's r...
Carla Yates	Sales Professional	helps clarify the purpose and context of the connection within your network
Jabez Parker	Sales Director	
Johnson David	Sales Executive	

11) You can also switch this to relationship view.

4G Enabled Tablets

Opportunity · Opportunity ▾

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

Opportunity Sales Process Active for 17 days

Qualify Develop Propose (17 D) Close

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

Connect ▾

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

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

# Map My Relationships – User Manual

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

**Opportunity**  
Entity Configuration

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

**General** Related

Entity

Set As Default **No**

Entity Node Setting

Entity Node Image **Entity Image**

Allowed Actions

Relationship Type Name Entity Configuration

One-to-many	see_opportunity_new_gross_opportunity	Opportunity
One-to-many	see_opportunity_new_subject_opportunity	Opportunity
One-to-many	see_opportunity_new_sopk_opportunity	Opportunity
<b>One-to-many</b>	<b>opportunity_connections1</b>	<b>Opportunity</b>

5 - 8 of 12 (0 selected) Page 2

**opportunity\_connections1**  
Entity Relationship

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

**General** Related

Relationship Type **One-to-many**

Relationship

Entity Configuration **Opportunity**

Use Default Configuration **Yes**

Node Settings

Relationship Node Image **Entity Image**

Allowed Actions

View to show fields on Tooltip

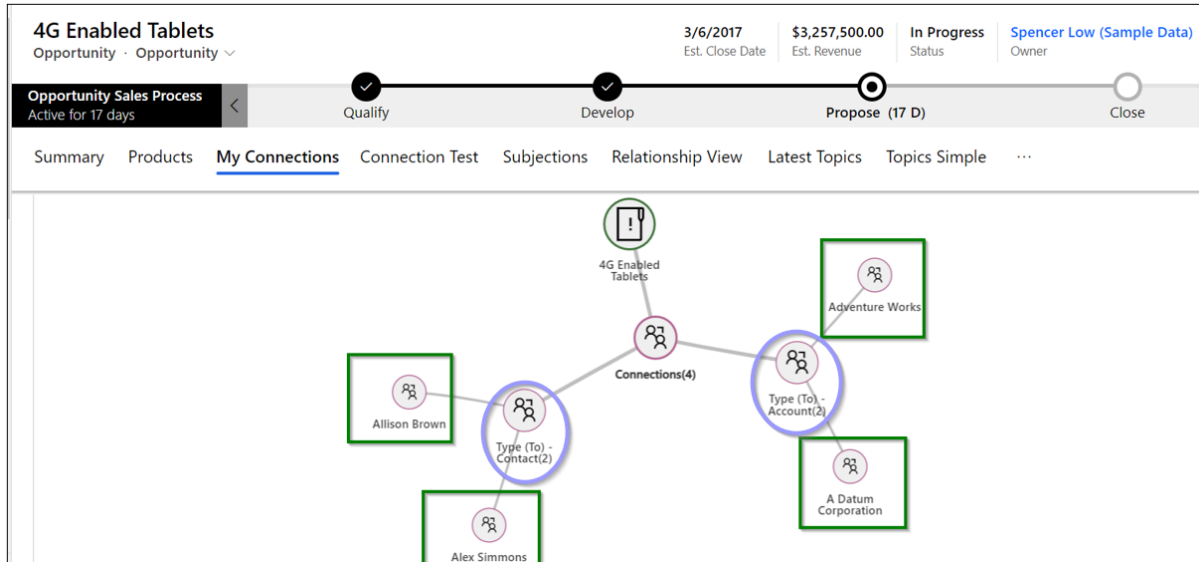
Cluster Settings

Group By

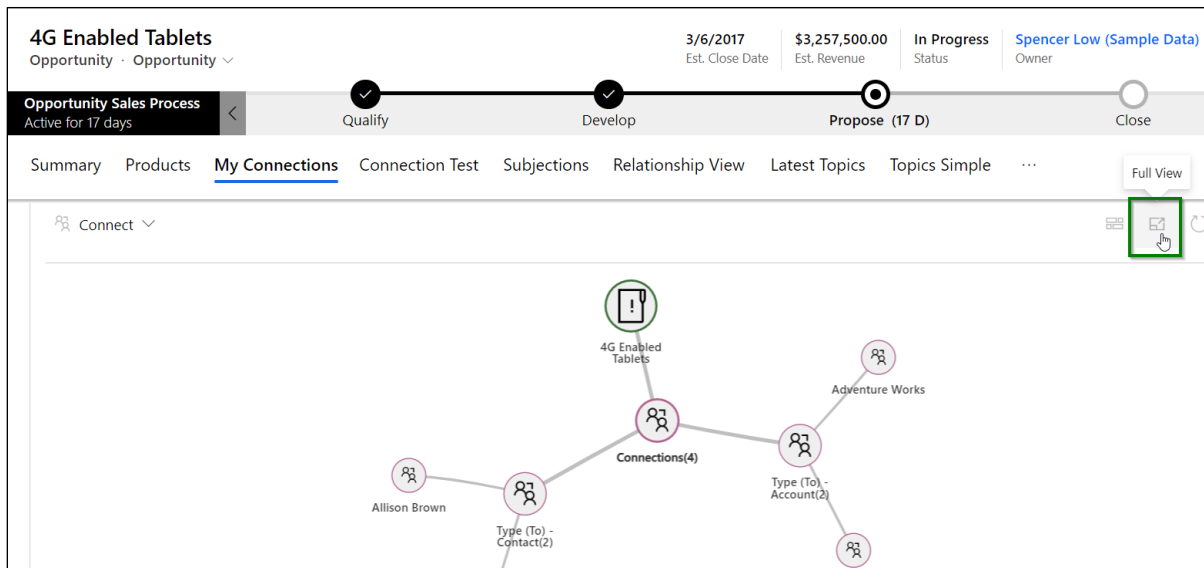
Measure

Aggregate Type ---

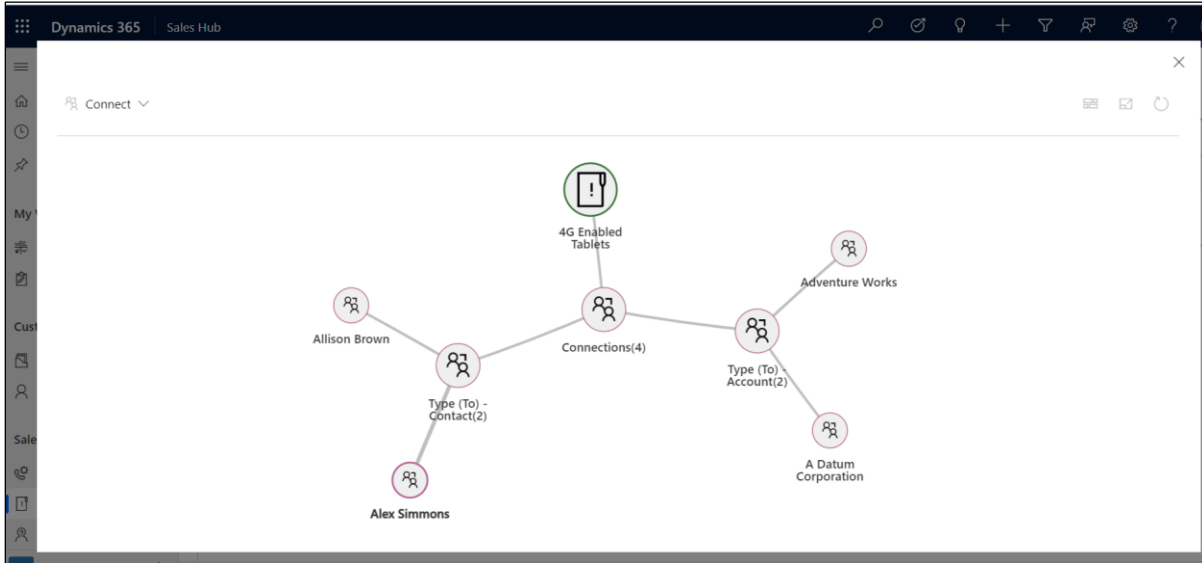
# Map My Relationships – User Manual



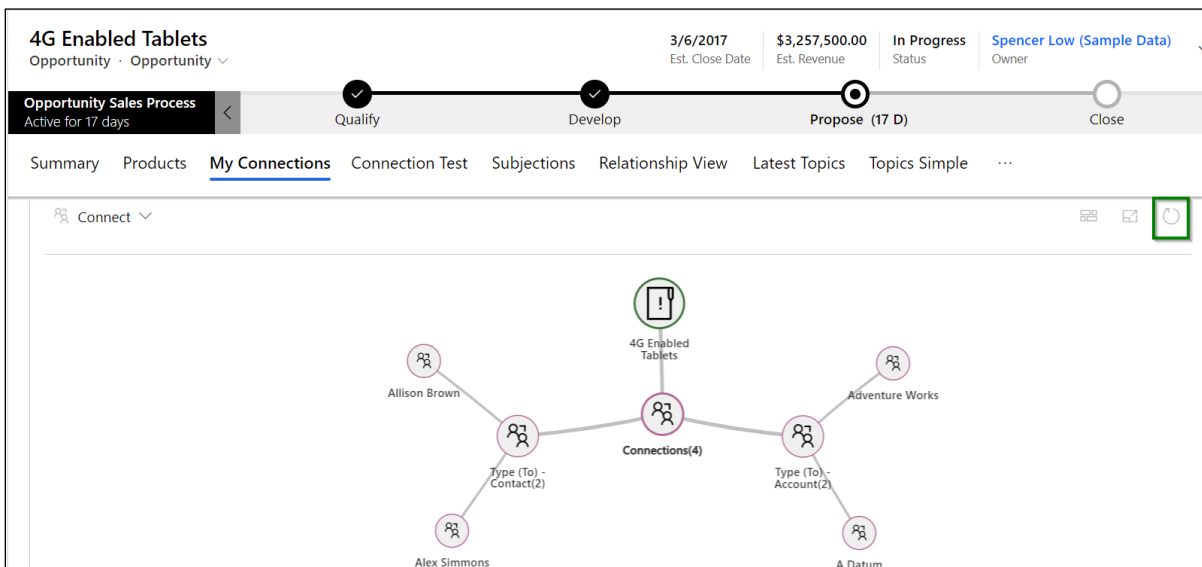
13) Click on 'Full View' button on the right top corner of the control to see the data in expanded screen.



Expanded mode:-

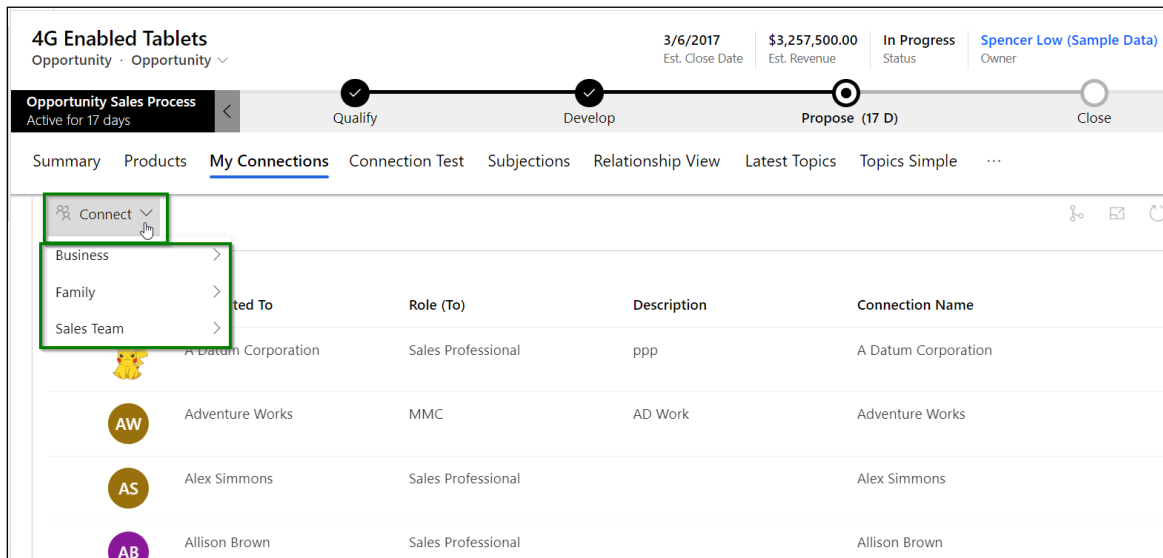
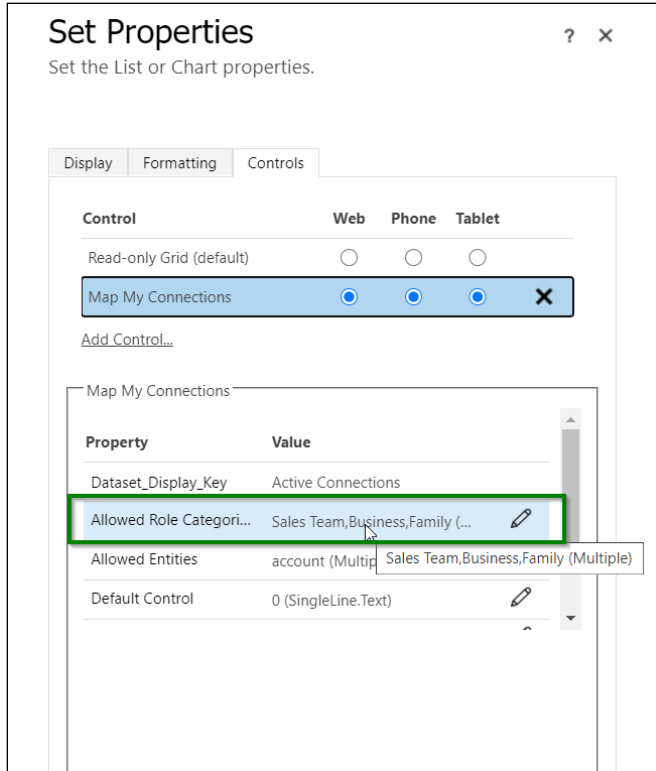


User can also refresh the control if required.



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

## Map My Relationships – User Manual



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

## Map My Relationships – User Manual

4G Enabled Tablets  
Opportunity · Opportunity ▾

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

Opportunity Sales Process Active for 17 days

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

Connect ▾

- Business >
- Family >
- Sales Team** ▾
- Adventure Works
- Alex Simmons
- Allison Brown

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

- 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

4G Enabled Tablets  
Opportunity · Opportunity ▾

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

Opportunity Sales Process Active for 17 days

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

Connect ▾

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

**Create Connection**

Role: Sales Professional ▾

Select Entity \* Select an entity ▾

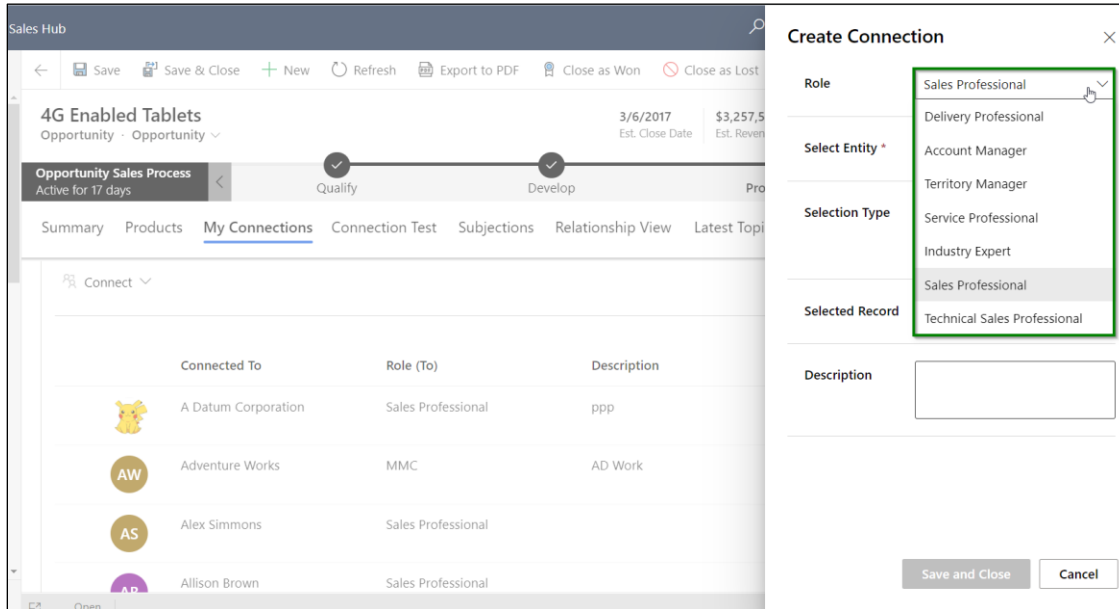
Selection Type:  Lookup  Relationships View

Selected Record: Select a record 🔍

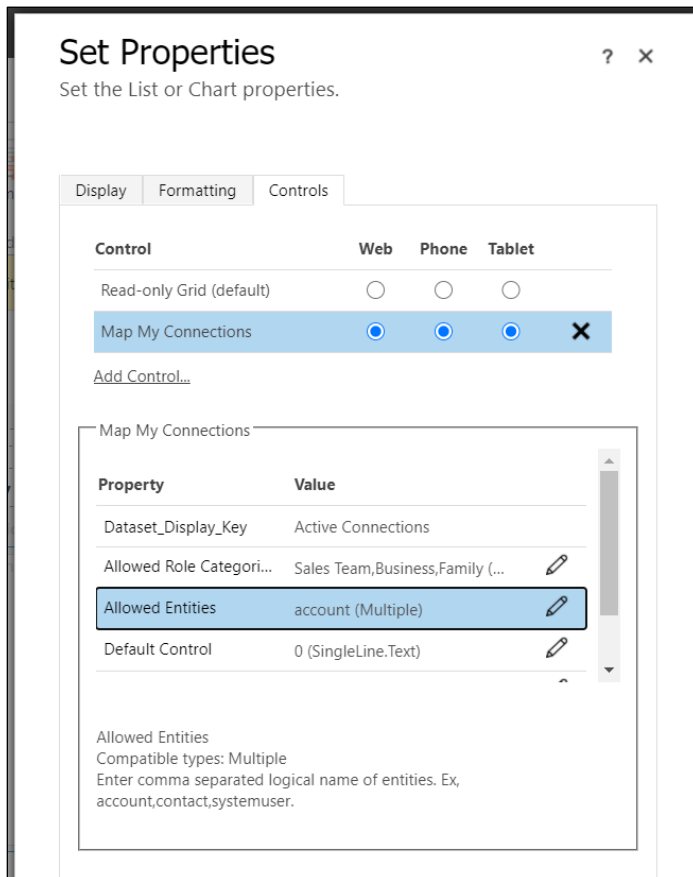
Description:

Save and Close Cancel

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



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





## Map My Relationships – User Manual

The screenshot shows the Sales Hub interface. The main window displays '4G Enabled Tablets' with a progress bar for 'Opportunity Sales Process' (Active for 17 days) showing 'Quality' and 'Develop' stages. Below this is a 'My Connections' section with a table of connections:

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

Overlaid on the right is the 'Create Connection' dialog box. It has the following fields:

- Role:** Sales Professional
- Select Entity \*:** Select an entity (dropdown menu with 'Account' selected and highlighted by a green box)
- Selection Type:** Radio buttons for 'Lookup' (selected) and 'Relationships View'
- Selected Record:** Select a record (input field)
- Description:** (empty text area)
- Buttons:** 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.

The screenshot shows the 'Set Properties' dialog box for 'Map My Connections'. It has three tabs: 'Display', 'Formatting', and 'Controls'. The 'Controls' tab is active, showing a table of controls for Web, Phone, and Tablet:

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

Below the table is an 'Add Control...' button. A scrollable list of properties is shown below that:

- Map My Connections
- Dataset\_Display\_Key: Active Connections
- Allowed Role Categori...: Sales Team,Business,Family (...)
- Allowed Entities: account (Multiple)
- Default Control: 0 (SingleLine.Text)
- Map My Relationship ...: Opportunity (SingleLine.Text)
- Allow to connect usin...: 0 (SingleLine.Text) (highlighted with a blue box)

At the bottom, there is a note: 'Allow to connect using Relationships Map? Compatible types: SingleLine.Text. Enter either 0 or 1. 0 = Yes and 1 = No.'

## Map My Relationships – User Manual

The screenshot shows the Sales Hub interface with the 'Create Connection' dialog box open. The dialog box has the following fields:

- Role:** Sales Professional
- Select Entity \*:** Account
- Selection Type:**  Lookup,  Relationships View
- Selected Record:** Select a record
- Description:** (empty text box)

The background shows the 'My Connections' tab with a table of connections:

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

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

The screenshot shows the Sales Hub interface with the 'Create Connection' dialog box open. The 'Selected Record' field is highlighted with a green box. The dialog box has the following fields:

- Role:** Sales Professional
- Select Entity \*:** Account
- Selection Type:**  Lookup,  Relationships View
- Selected Record:** Select a record
- Description:** (empty text box)

The background shows the 'My Connections' tab with a table of connections:

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

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

## Map My Relationships – User Manual

The screenshot shows the Sales Hub interface with the 'My Connections' tab selected. A 'Lookup Records' dialog box is open on the right. The dialog box has a search bar with 'Best o' Sales' entered and a green box around it. Below the search bar is a list of 'Recent Accounts' including 'Alpine Ski House', 'SHU Ltd', 'Baker's Treat', 'Zara Sales', 'Claunks LTD', and 'Adventure Works'. At the bottom of the dialog box, the 'Add' button is highlighted with a green box.

8) This will set the record to the field.

The screenshot shows the Sales Hub interface with the 'My Connections' tab selected. A 'Create Connection' dialog box is open on the right. The dialog box has 'Sales Professional' selected for 'Role', 'Account' for 'Select Entity', and 'Best o' Sales' for 'Selected Record'. The 'Selected Record' field is highlighted with a green box. Below the 'Selected Record' field is a 'Description' text box. At the bottom of the dialog box, there are 'Save and Close' and 'Cancel' buttons.

9) You can add description if required.

## Map My Relationships – User Manual

The screenshot shows the Sales Hub interface with the 'My Connections' tab selected. A 'Create Connection' dialog box is open on the right. The dialog box contains the following fields:

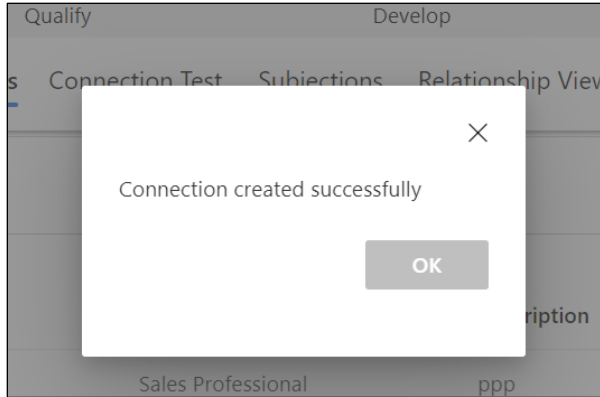
- Role: Sales Professional
- Select Entity \*: Account
- Selection Type:  Lookup,  Relationships View
- Selected Record: Best o' Sales
- Description: Account Connection (highlighted with a green border)
- Buttons: Save and Close, Cancel

10) Click on 'Save and Close'.

The screenshot shows the same Sales Hub interface as above, but now the 'Save and Close' button in the 'Create Connection' dialog box is highlighted with a green border. The 'Description' field is no longer highlighted.

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

## Map My Relationships – User Manual



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

4G Enabled Tablets  
Opportunity · Opportunity ▾

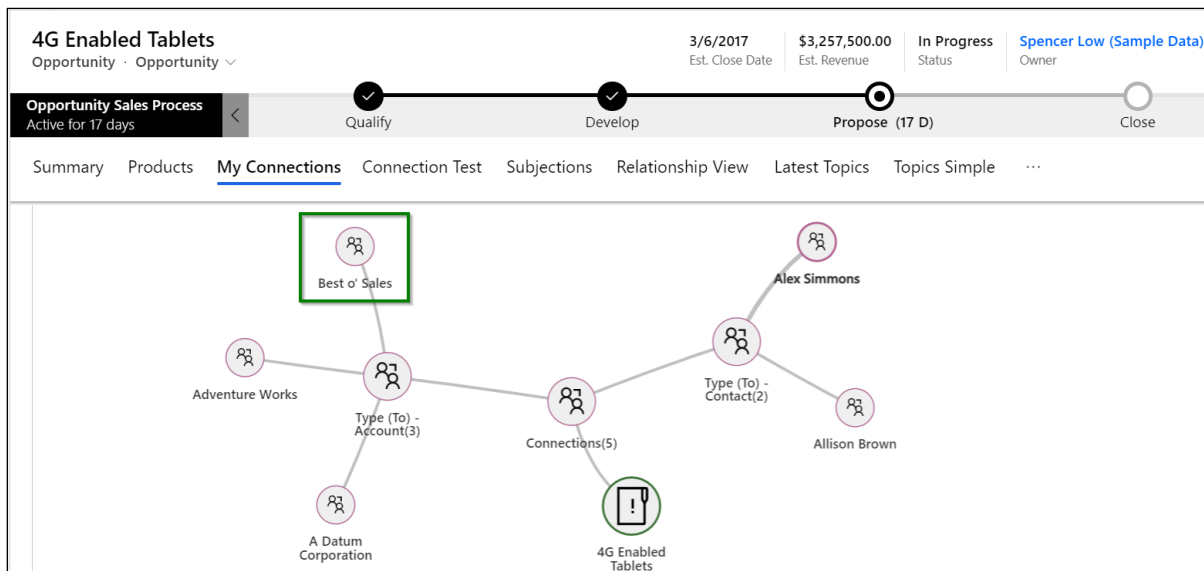
3/6/2017 Est. Close Date \$3,257,500.00 Est. Revenue In Progress Status Spencer Low (Sample Data) Owner

Opportunity Sales Process Active for 17 days

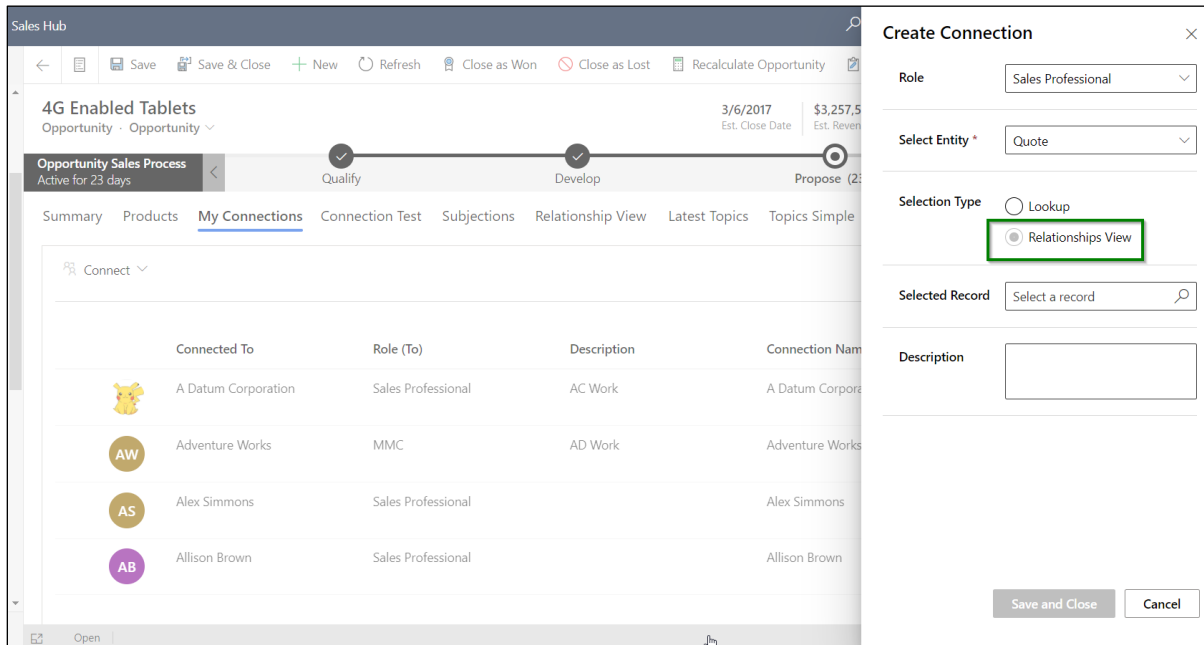
Qualify Develop Propose (17 D) Close

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

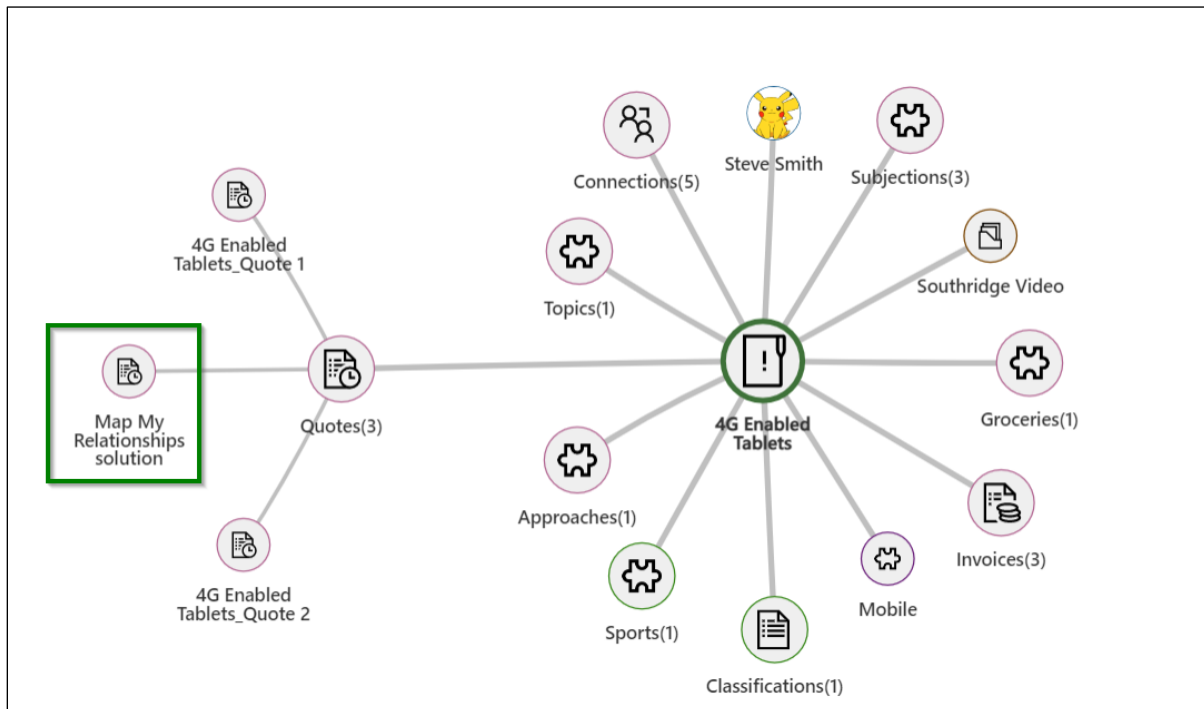
Connected To	Role (To)	Description	Connection Name
A Datum Corporation	Sales Professional	ppp	A Datum Corporation
Adventure Works	MMC	AD Work	Adventure Works
Alex Simmons	Sales Professional		Alex Simmons
Allison Brown	Sales Professional		Allison Brown
Best o' Sales	Sales Professional	Account Connection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



### How to add a connection using relationship view?



a) Select a quote record through the relationship view.



## Map My Relationships – User Manual

b) Proceed to 'Save and Close'.

The screenshot shows the 'Create Connection' dialog box in Salesforce. The dialog is open over the 'My Connections' page. The 'Role' is set to 'Sales Professional' and 'Select Entity' is 'Quote'. The 'Selected Record' field contains 'Map My Relationships sol...'. The 'Save and Close' button is highlighted with a green box.

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

The screenshot shows the 'My Connections' page in Salesforce. A modal dialog box is displayed in the center with the message 'Connection created successfully' and an 'OK' button.

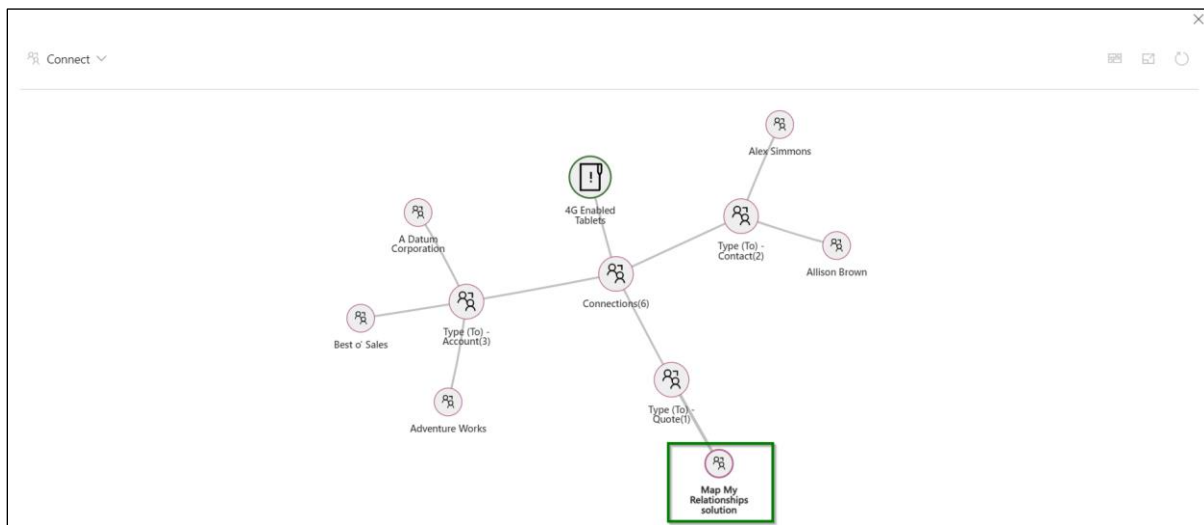
Connected To	Role	Description	Connection Name
A Datum Corporation	Sales Professional	AC Work	A Datum Corpora
Adventure Works	MMC	AD Work	Adventure Works
Alex Simmons	Sales Professional		Alex Simmons
Allison Brown	Sales Professional		Allison Brown

# Map My Relationships – User Manual

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

4G Enabled Tablets		3/6/2017		\$3,257,500.00		In Progress		Spencer Low (Sample Data)	
Opportunity Sales Process		Est. Close Date		Est. Revenue		Status		Owner	
Active for 23 days		Qualify		Develop		Propose (23 D)		Close	
Summary	Products	<b>My Connections</b>	Connection Test	Subjections	Relationship View	Latest Topics	Topics Simple	Simple MMR View	Invoices ...
	A Datum Corporation	Sales Professional	AC Work	A Datum Corporation					
	Adventure Works	MMC	AD Work	Adventure Works					
	Alex Simmons	Sales Professional		Alex Simmons					
	Allison Brown	Sales Professional		Allison Brown					
	Best o' Sales	Sales Professional	Account Connection	Best o' Sales					
	Map My Relationships solution	Sales Professional		Map My Relationships solution					

As well as in the relationship view of connections:





## Map My Relationships – User Manual

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

**Audio Equipment**  
Opportunity · Opportunity ▾

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

Opportunity Sales Process Active for 31 days

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

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

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

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

**Audio Equipment**  
Opportunity · Opportunity ▾

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

Opportunity Sales Process Active for 31 days

Qualify | Develop | Propose (31 D) | Close

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

AS	Alex Simmons	Former Employer		Alex Simmons	⋮
AH	Alpine Ski House	MMC		Alpine Ski House	⋮
BT	Baker's Treat	Former Employer	Treats	Baker's Treat	⋮
DF	Derby FC	MMC	Football Club	Derby FC	⋮
	Interested in AlertsDynamic	MMC			⋮

**Update Connection** ×

Role: Former Employer ▾

Select Entity\*: Contact ▾

Selection Type:  Lookup  Relationships View

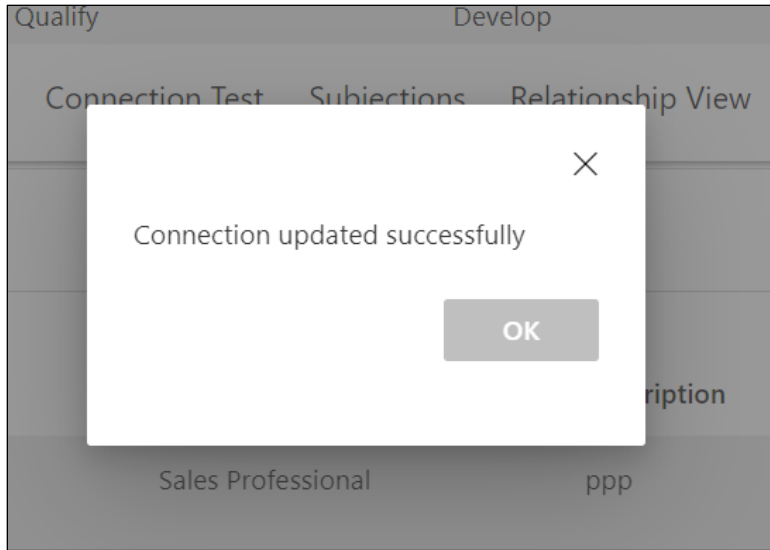
Selected Record: Alex Simmons 🔍

Description:

**Save and Close** Cancel

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

## Map My Relationships – User Manual



16) Updates will reflect into the record.

A screenshot of a sales opportunity record for "Audio Equipment". The record is in the "Propose (31 D)" stage. The "My Connections" tab is active, showing a list of connections. The first connection, "Alex Simmons", is highlighted with a green box. The connection type is "Former Employer" and the contact name is "Alex Simmons". The text "Connection contact" is highlighted in a green box within the connection details.

**Audio Equipment**  
Opportunity · Opportunity ▾

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

Opportunity Sales Process Active for 31 days

Qualify Develop Propose (31 D) Close

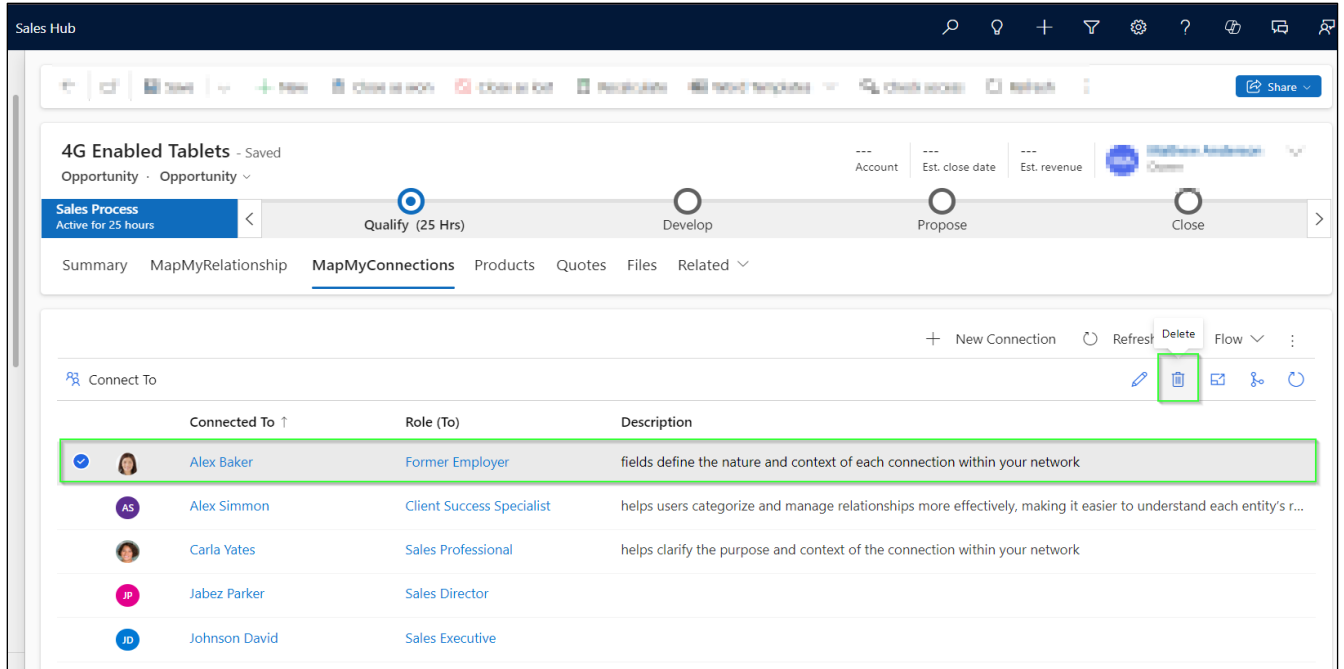
Summary Products **My Connections** Connection San STD Connection Test Connection Tiny View Subjections Relationship View ...

AS	Alex Simmons	Former Employer	Connection contact	Alex Simmons	⋮
AH	Alpine Ski House	MMC		Alpine Ski House	⋮
BT	Baker's Treat	Former Employer	Treats	Baker's Treat	⋮
DF	Derby FC	MMC	Football Club	Derby FC	⋮
IA	Interested in Alerts4Dynamics	MMC		Interested in Alerts4Dynamics	⋮

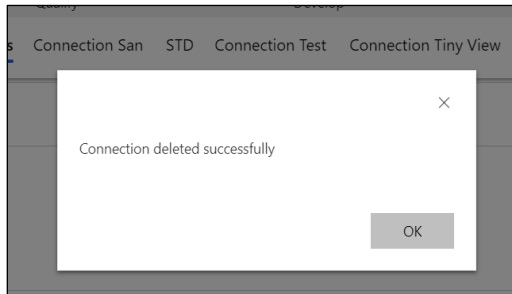
Along with create and update, user can also delete the connection record.

Deleting from **larger** connection control –

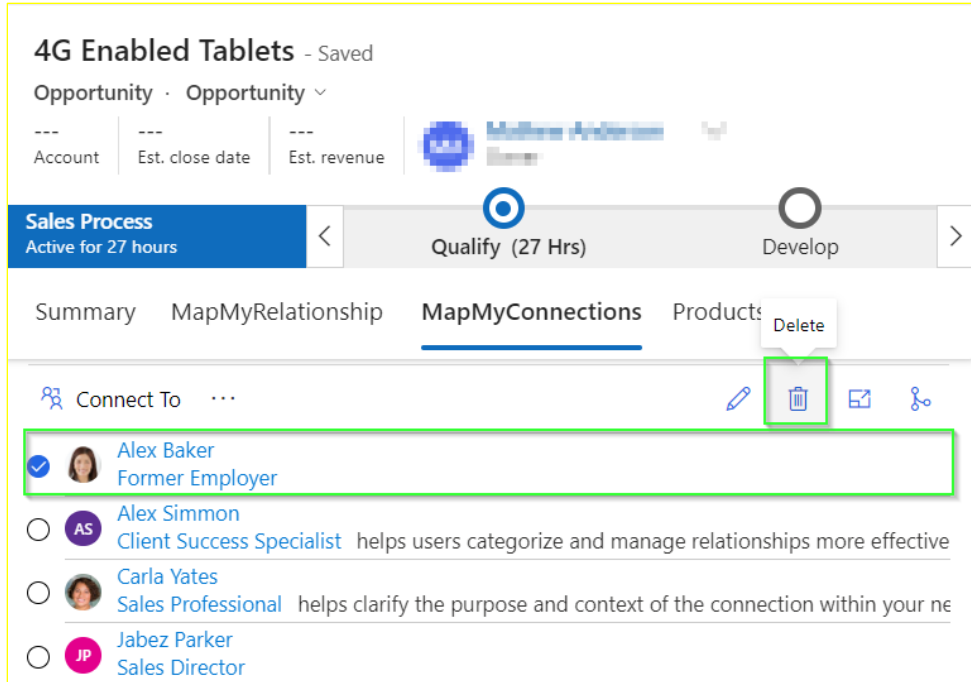
# Map My Relationships – User Manual



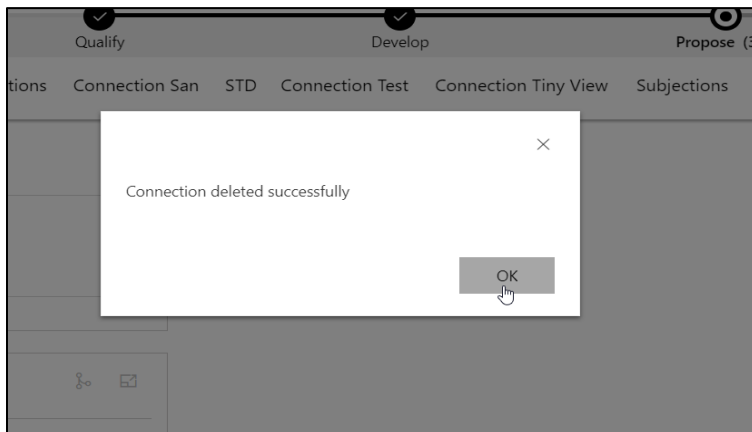
Connection record is deleted successfully.



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

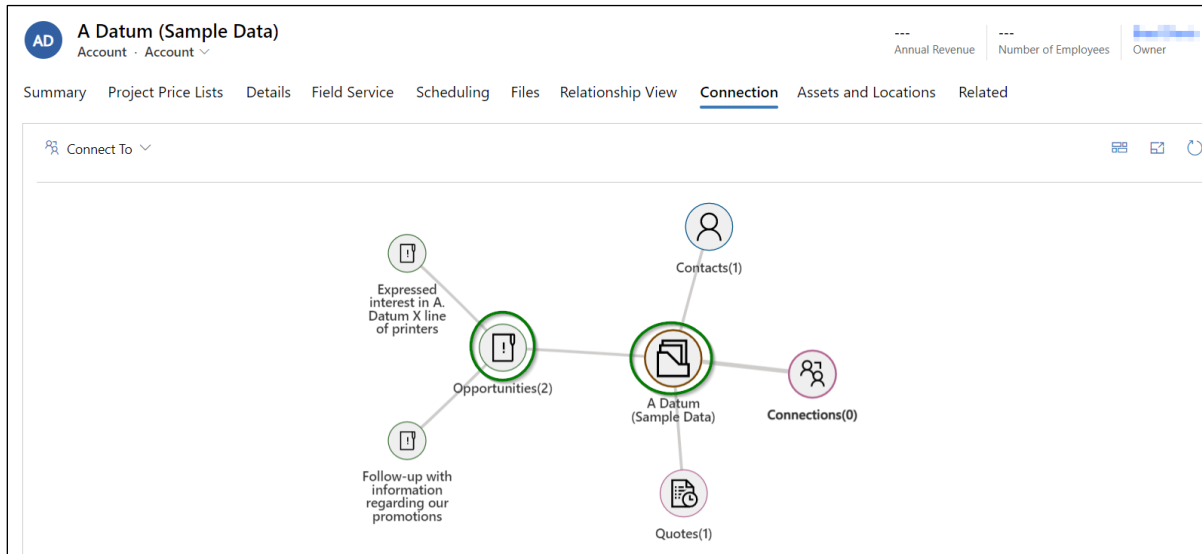
Once the connection control is established, users can further drill N-level down through the records within the connection relationship view and connect any record to the main primary record as a connection.

This is explained in detail in the below scenario.

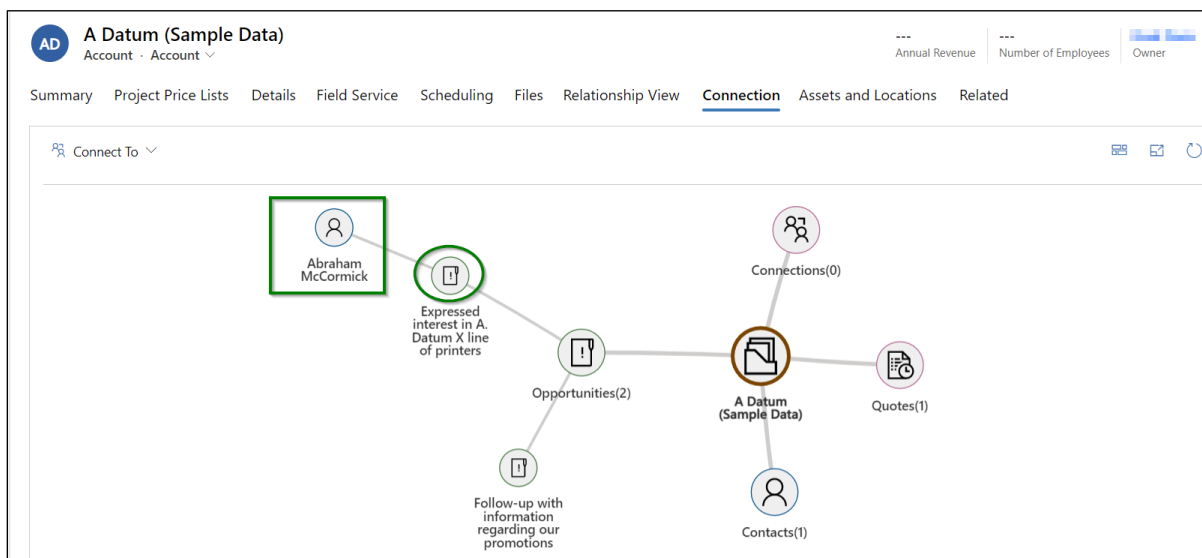
## Map My Relationships – User Manual

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)'**).

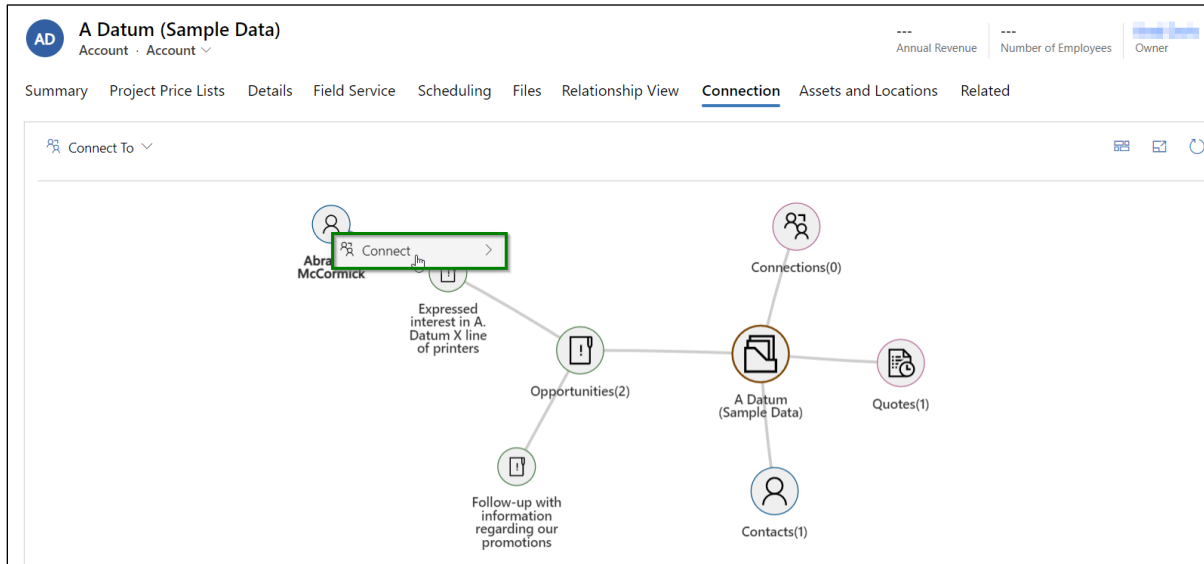


Suppose the user wants to connect this **'Abraham McCormick'** contact to **'A Datum (Sample Data)'** main account record.

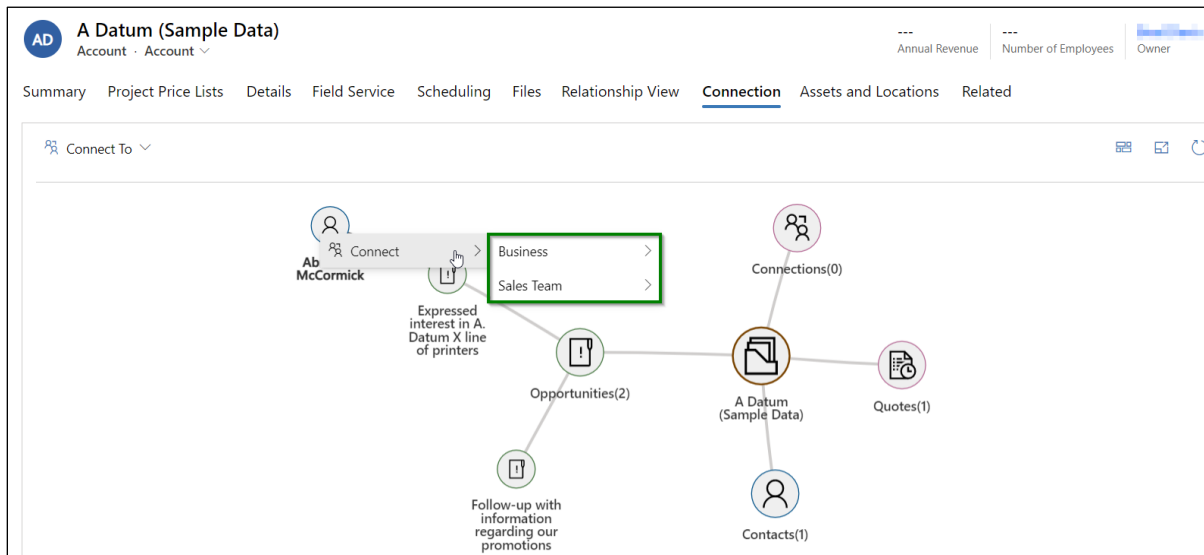
## Map My Relationships – User Manual

For this, follow the steps given below:

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

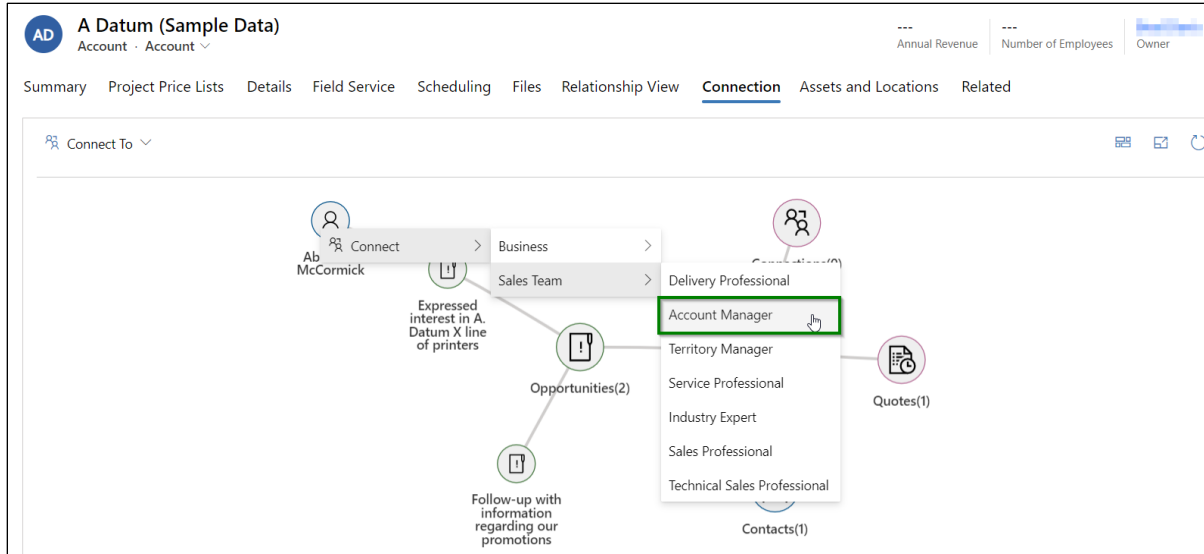


- 2) Select the role category that you would like to create a connection with to account. (Here, it will populate the list of all those role categories that are enabled on the connection control for creating connections).

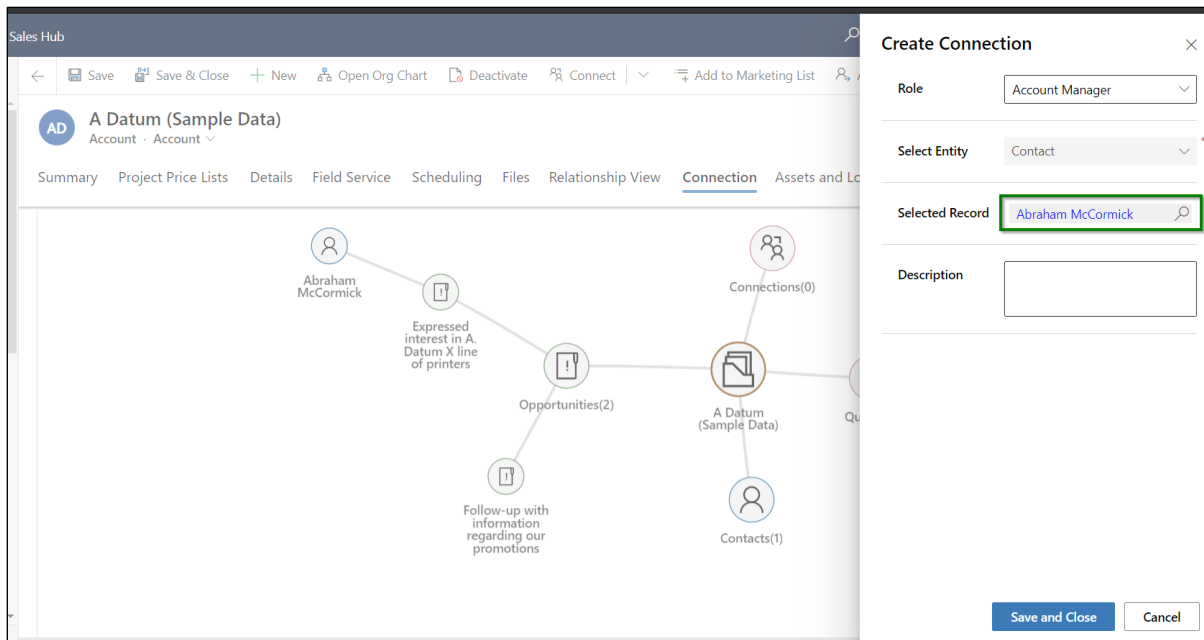


- 3) Pick a category and choose one of the roles under it.

## Map My Relationships – User Manual

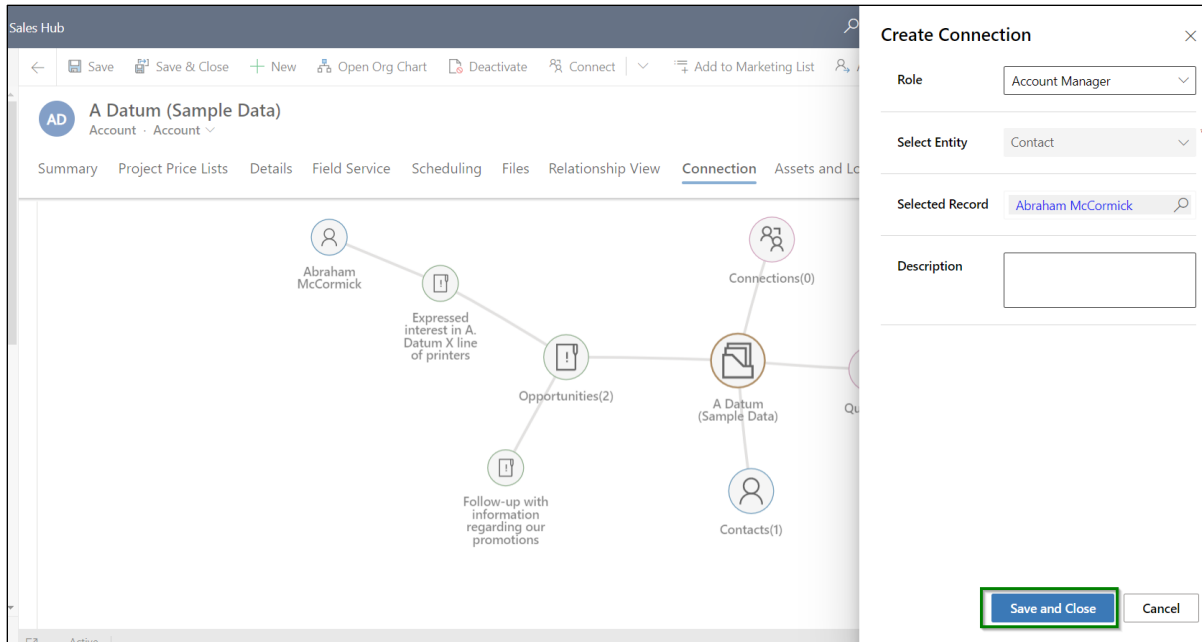


- 4) Once connection role is selected, **'Create Connection'** form will open up with contact record set to the field **'Selected Record'**.

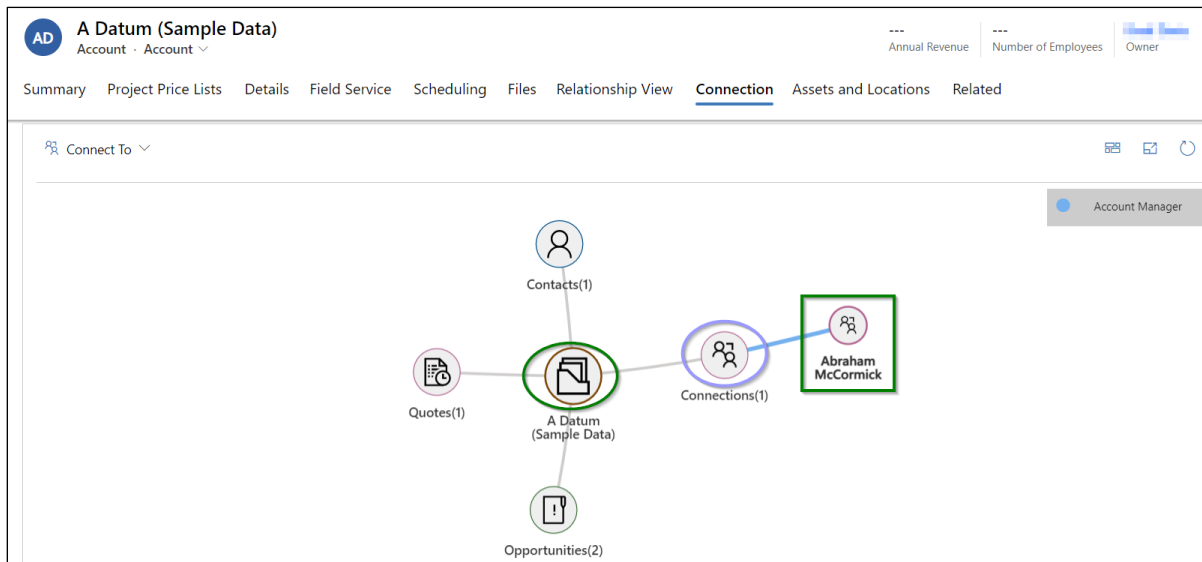


- 5) Click on **'Save and Close'**.

## Map My Relationships – User Manual



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

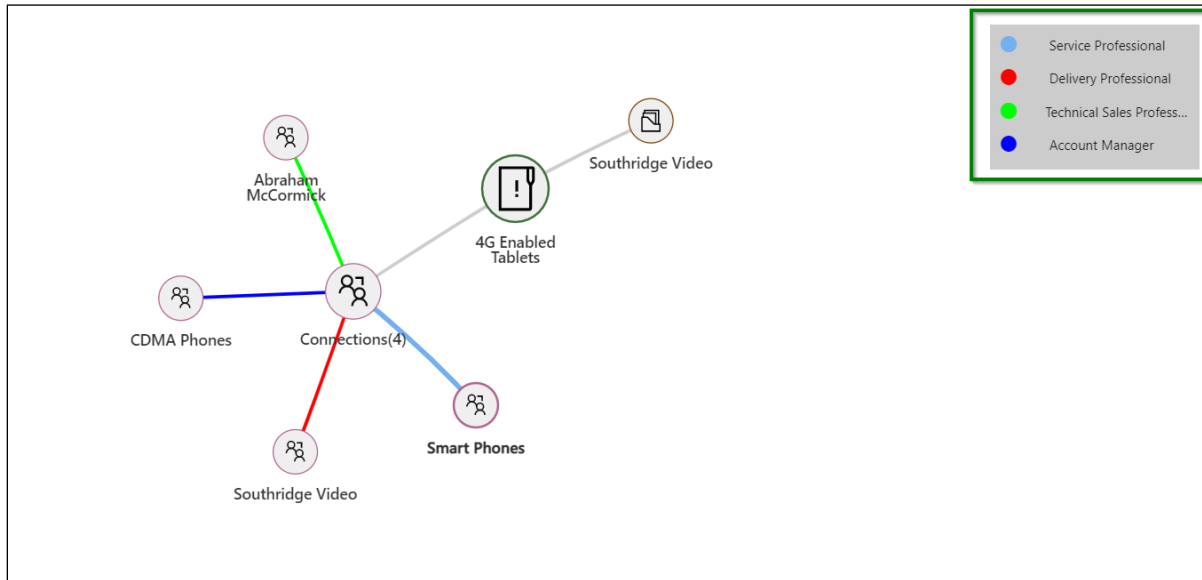


With the help of the above steps, we have successfully managed to connect a record to the main primary record from the connection relationship view itself. This has speeded up the process of creating a connection where user did not have to navigate anywhere else outside the connection relationship view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



## Colour legends in connection relationship view

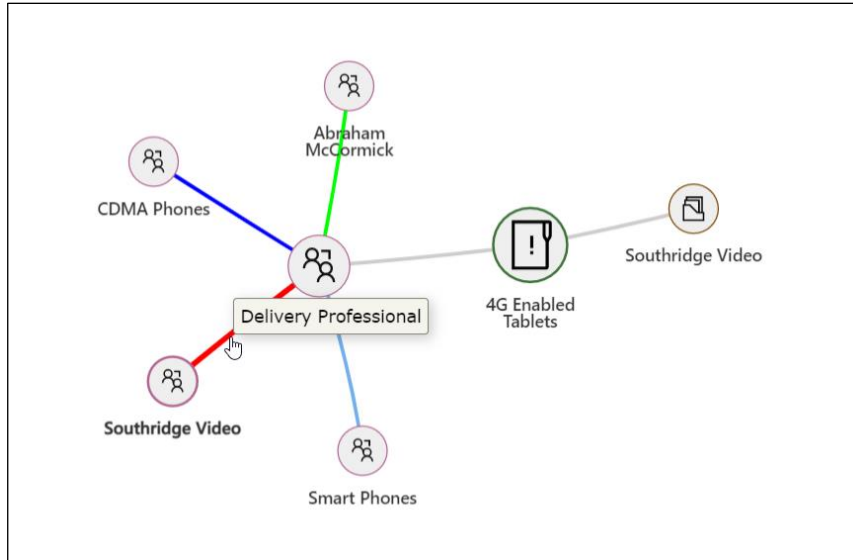
Colour legends are now shown inside connection relationship view based on the connection roles using which the records are connected to the main/primary entity record. This will help the users to easily identify the connection roles as illustrated in the below example:



- 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;





## Map My Relationships – User Manual



**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.

Connected To ↑	Role (To)	Type (To)	Description	Created By
 Abraham McCormick	Technical Sales Professional	Contact		<a href="#">View Record</a>
 CDMA Phones	Account Manager	Opportunity		<a href="#">View Record</a>
 Smart Phones	Service Professional	Opportunity		<a href="#">View Record</a>
 Southridge Video	Delivery Professional	Account	AS	<a href="#">View Record</a>

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

The screenshot shows a CRM interface for a contact named Abraham McCormick. At the top, there is a navigation bar with icons for Save, Save & Close, New, Deactivate, Connect, and Add to Marketing List. Below this is the contact's profile header, including a profile picture, the name 'Abraham McCormick', and a 'Contact' dropdown menu. A horizontal menu below the header offers tabs for Summary (which is selected), Details, Scheduling, Files, Relationship View, and Related. The main content area is divided into two panels. The left panel, titled 'CONTACT INFORMATION', contains three fields: 'First Name' with the value 'Abraham', 'Last Name' with the value 'McCormick', and 'Job Title' with a placeholder '---'. The right panel, titled 'Timeline', features a search bar labeled 'Search timeline' and a text input field labeled 'Enter a note...'.

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

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## Contact Us

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**Twitter:** @inogic