



White Paper

Map My Relationships - White Paper

Aim:

Map My Relationships is a productivity control that offers an easy way to visualize key information related to the record much like a mind map view for Dynamics 365 records.

With a quick glance the user is able to gain information of all the important information that matters about the record without having to navigate around to get the various pieces of information.

Features:

- 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 needing to create roll-up 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
- Capability to configure the connection control to create, update, view and delete connection records
- Provision to quickly create a new entity record through the entity node in the relationship view in just one click
- 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.

Supported Versions

Versions: Microsoft Dynamics 365 v9.1 and above, Dataverse (Power Apps).
Deployment Models: Online

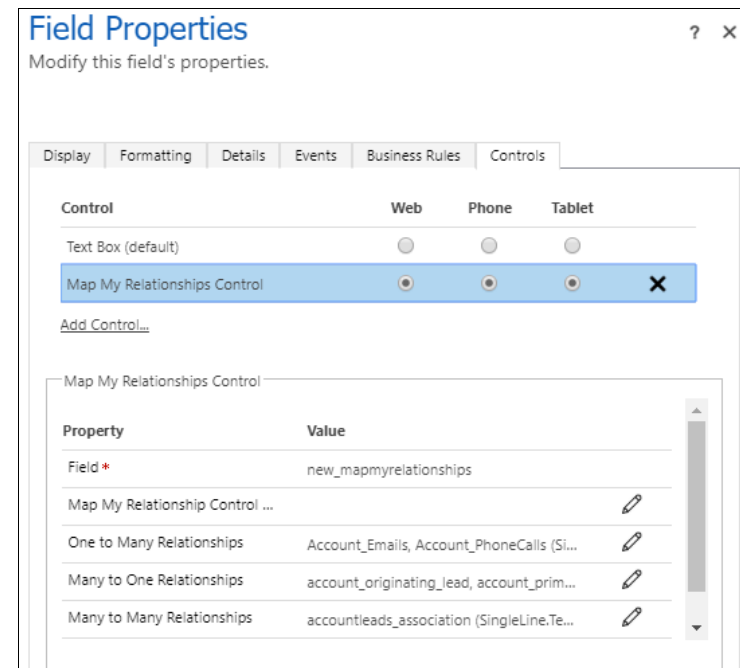
Who needs it?

This control will help user to have a quick view of the entity records with their associated entity relationships within CRM.

Field based Control

Add any text field on the form and bind Map My Relationships or Map My Connections control to it.

Map My Relationships Control:



Field Properties
Modify this field's properties.

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

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

Add Control...

Map My Relationships Control

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

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Map My Connections Control:

Set Properties

Set the List or Chart properties.

Display
Formatting
Controls

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

[Add Control...](#)

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

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

OK
Cancel

4G Enabled Tablets
1/4/2017
\$1,257,500.00
In Progress
Spencer Law (Sample Data)

Opportunity Sales Process
Quality
Develop
Progress (38.0%)
Close

Summary
Products
My Connections
Connection Sen...
STD
Connection Text
Connection Tiny View
Subjections
Relationship View

| Connected To | Role (To) | Description | Connection Name |
|--|--------------------|-------------|-------------------------------|
| AW Adventure Works Electronics | Sales Professional | | Adventure Works Electronics |
| DL City Power & Light | Sales Professional | | City Power & Light |
| DF Derby FC | Sales Professional | | Derby FC |
| M Map My Relationships solution | Account Manager | | Map My Relationships solution |

Map My Relationships Visualization

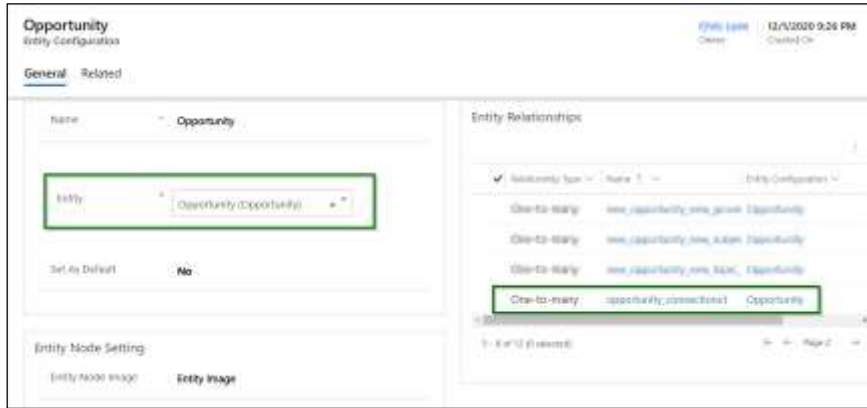
Map My Relationships control visualizes the related records of an entity in network-style UI.



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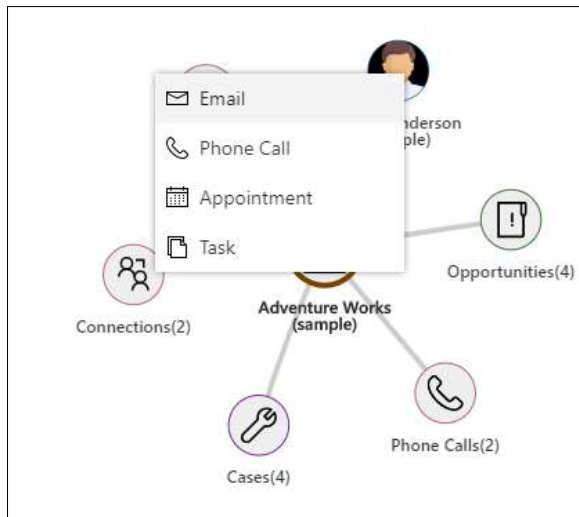
Configuration details

Ability to configure additional details with regards to the relationships that are being visualized.



Quick Contextual Actions

Quickly create activities from this view for any related record being displayed.



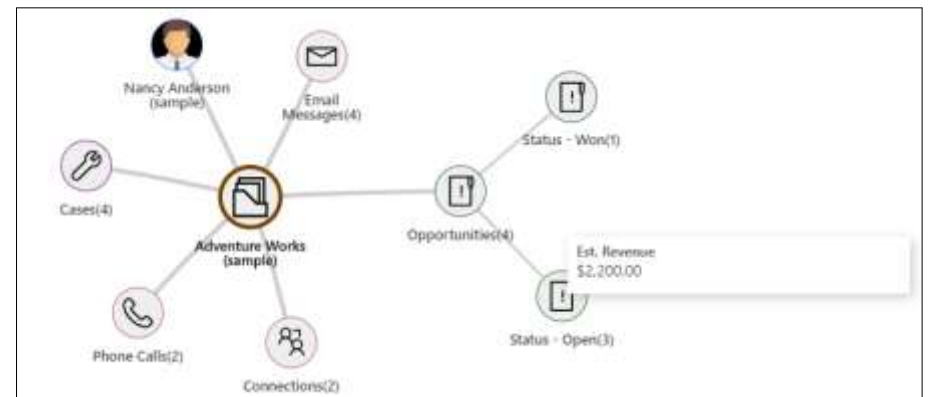
Tooltips Configuration

Configure tooltip data to be displayed on hover over the entity record node.



Grouping and Aggregation

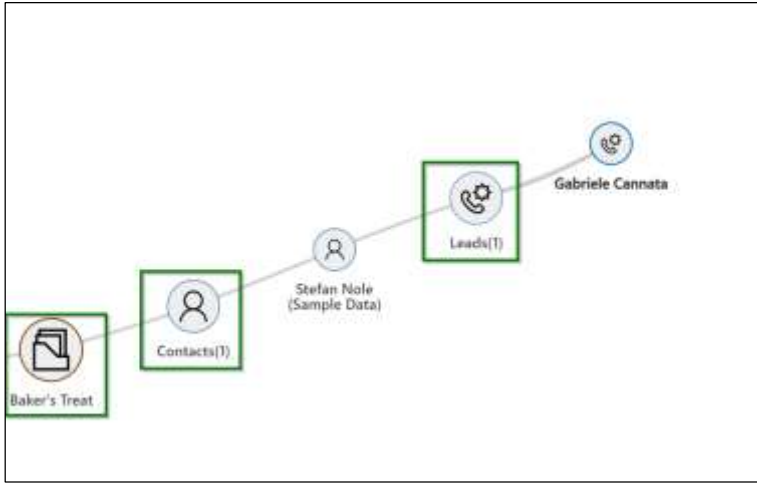
Support for Grouping and Aggregation of related records that are being visualized. Currently supports Sum, Count, Max, Min, Avg.



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Child Configuration – Drill down N-level

Drill down further through N-level relationships of a particular entity to see associated entity records.



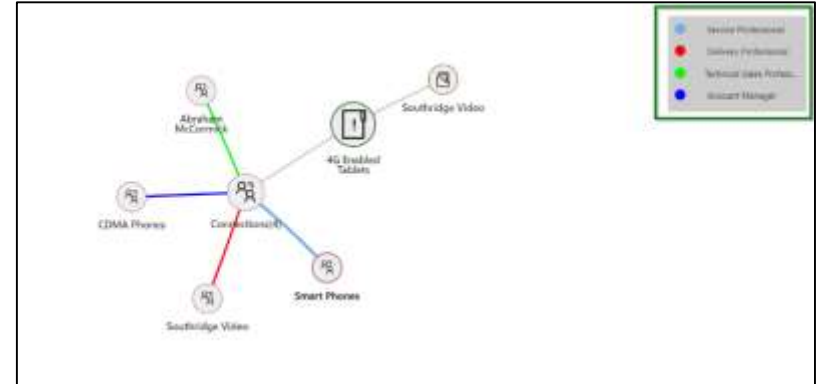
Connect Records

Drill N-level through relationships and connect a record straight from the connection relationship view itself.



Colour Legends

Classify respective connection roles to which the records are connected to with the help of colour legends.



Create Associate Record

Ability to create new entity records within the relationship view in a single click.



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