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).
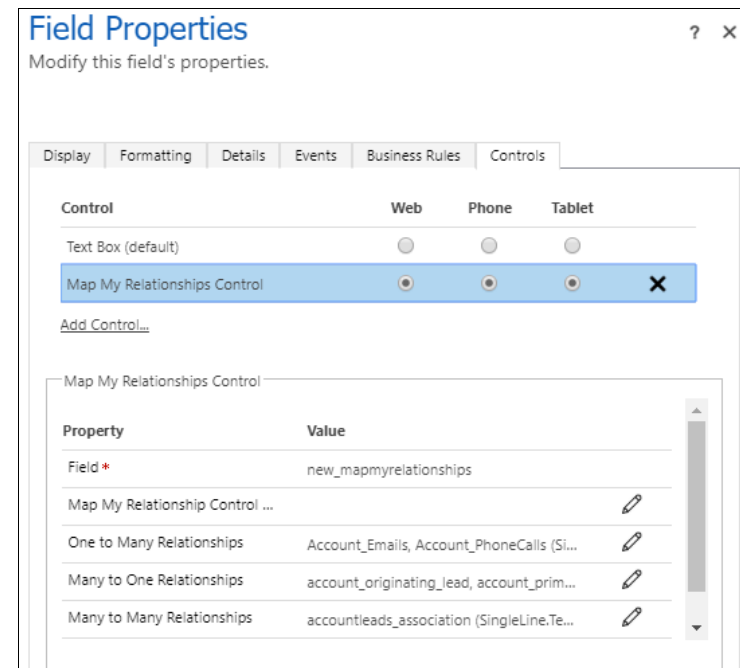**Deployment Models:** Online

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:

Map My Connections Control:

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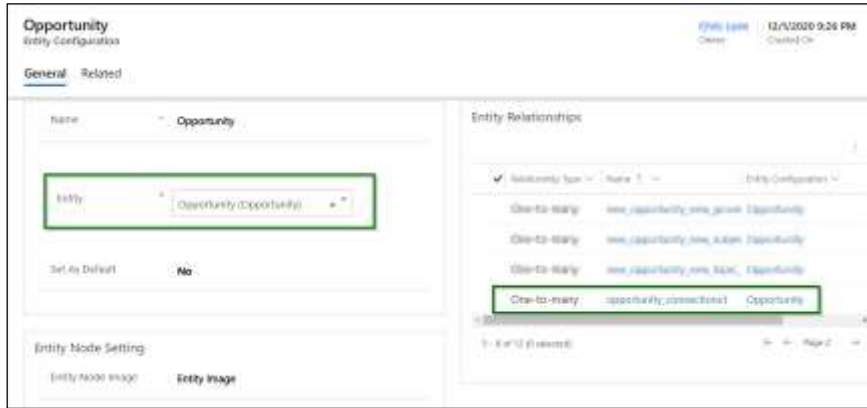
Map My Relationships control visualizes the related records of an entity in network-style UI.
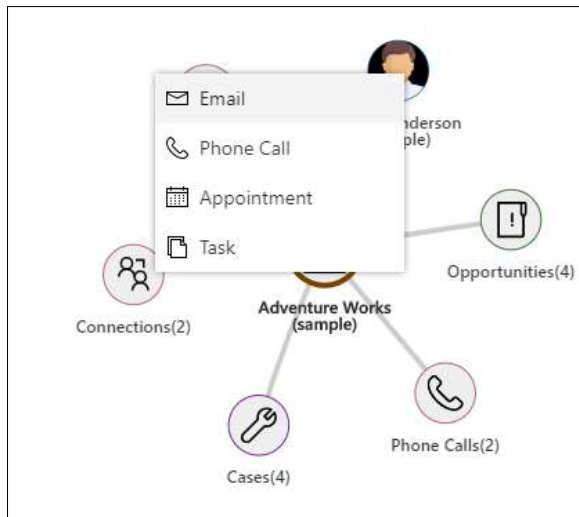
Configuration details

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.
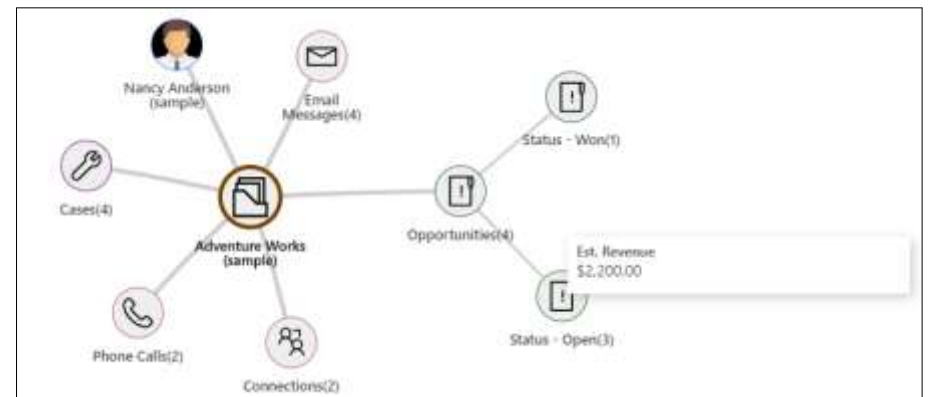

Tooltips Configuration

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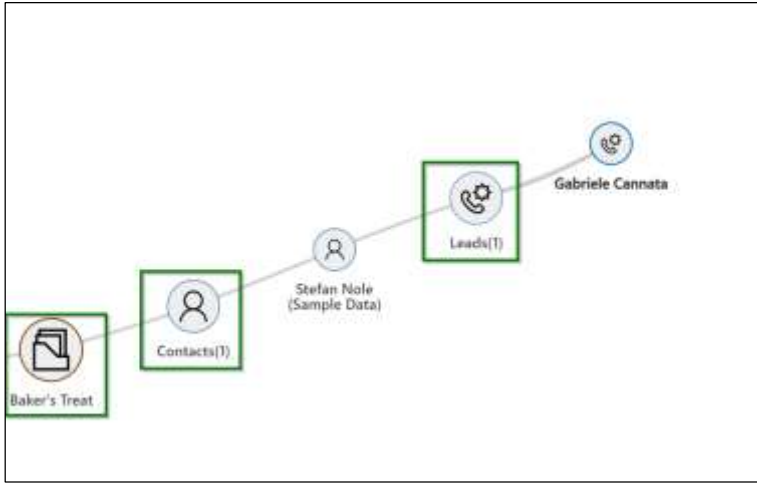

Grouping and Aggregation

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

Child Configuration – Drill down N-level

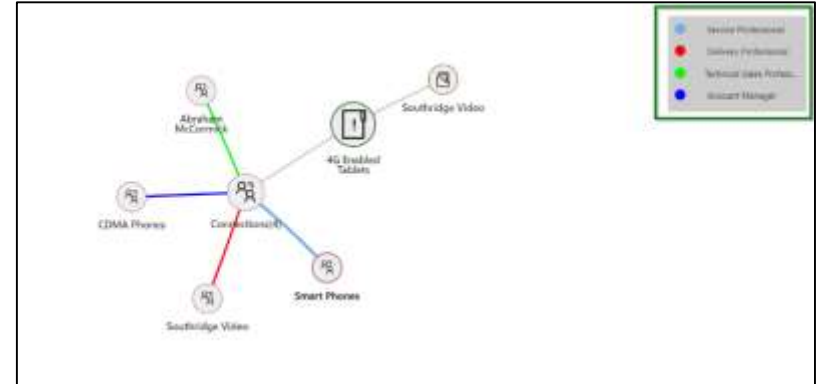Drill down further through N-level relationships of a particular entity to see associated entity records.

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 relatioship view in a single click.

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