Connections UI

Scenarios

The Connections UI was designed because user needs kept arising around an easy way to establish relationships between different records without having to spend a lot of time configuring the system just to get it to work. We also wanted to have an interface that was easier to use than the out-of-the-box UI that was in place.

Here are some of the common scenarios we have encountered from users:

1. Multiple Owners – with The Connections UI you are able to assign a role that can be leveraged and utilized as a proxy for ownership. By default Dynamics 365 only allows one owner per record, however, with Connections you're able to grant other ownership, or stewardship, roles to users. Ex: a Team, or Queue, might own a case but a User can be given a Connection that assigns them as the "responsible party".

2. Membership - with The Connections UI you are able to assign a role that can be leveraged and utilized as a way to identify how Contacts, Clients, or Users are part of a group of records. Ex: Contact 1 is a member of the "Not Now Alliance", while another Contact 2 is the chairperson of the "Not Now Alliance".

3. Attendance – with the Connections UI you can identify a User or Contact (or other custom entity) and their invitation, decline, no show or attendance to a calendar Appointment. Ex: Contact 1 is invited to Appointment 1, User 1 invited, User 2 invited… after the Appointment ends it could be updated to show that Contact 1 attended, User 1 was a no show, and User 2 attended.

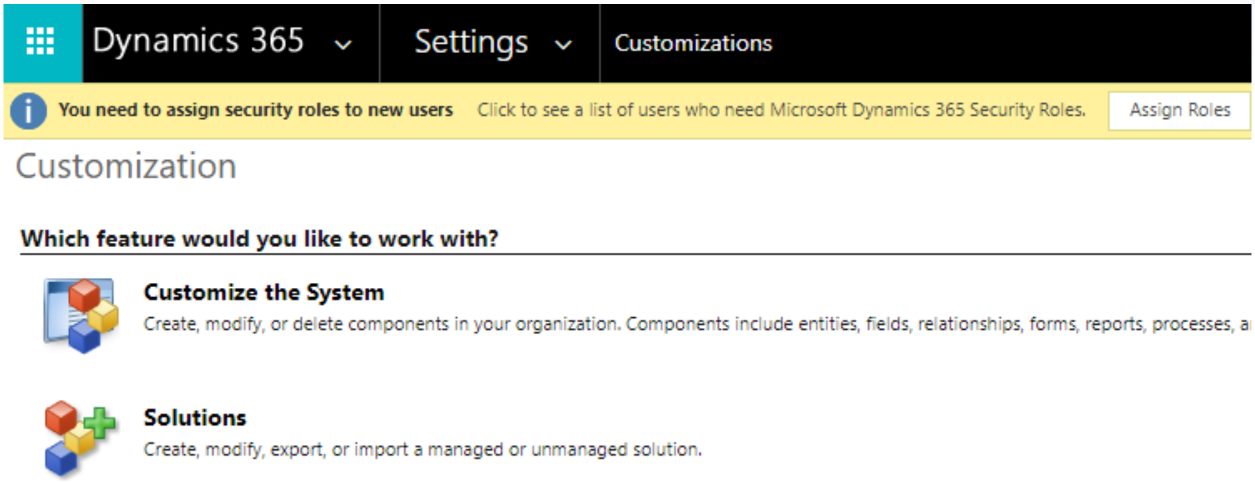
Description

Connections UI gives users a simplified interface to create connections between entities through categories and connection roles.

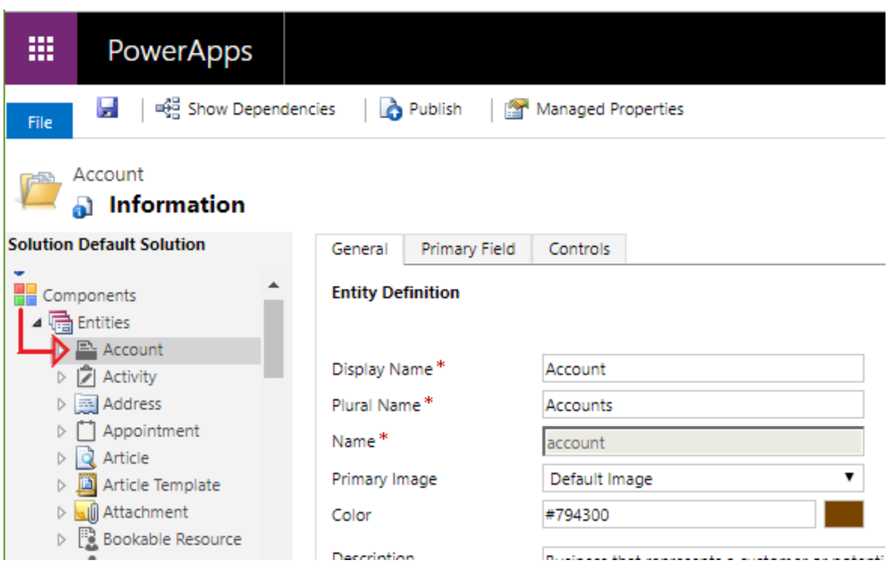
Configure Connection Options

The "Entity Connections" entity, can be used to configure connections between two entities and create categories for theses connections. The "Category Connection" Entity allows connection roles to be grouped into categories and acts as a filter for a long list of connection roles. Before an Entity Connection can be created, the entities must be enabled for connections. To enable an entity for connection the user will need to navigate to Settings >> Customizations.

Connections UI

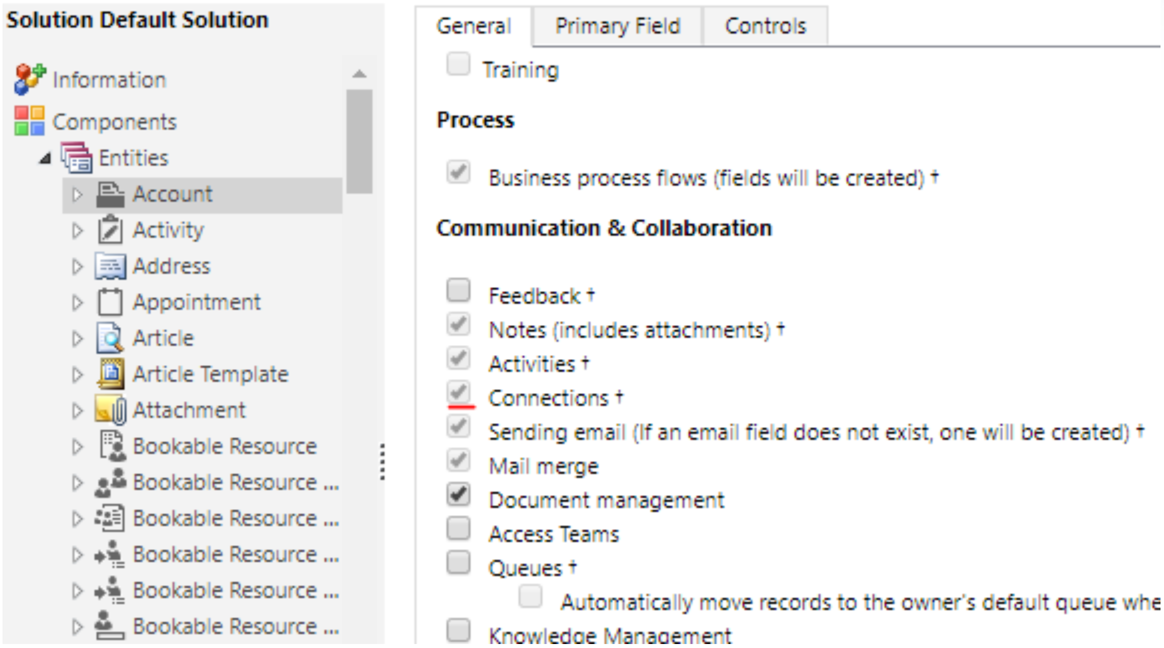


Select customize the system to open the default solution or click solutions and open a custom solution. Once the solution is open, navigate to the entity to be enabled for connections.

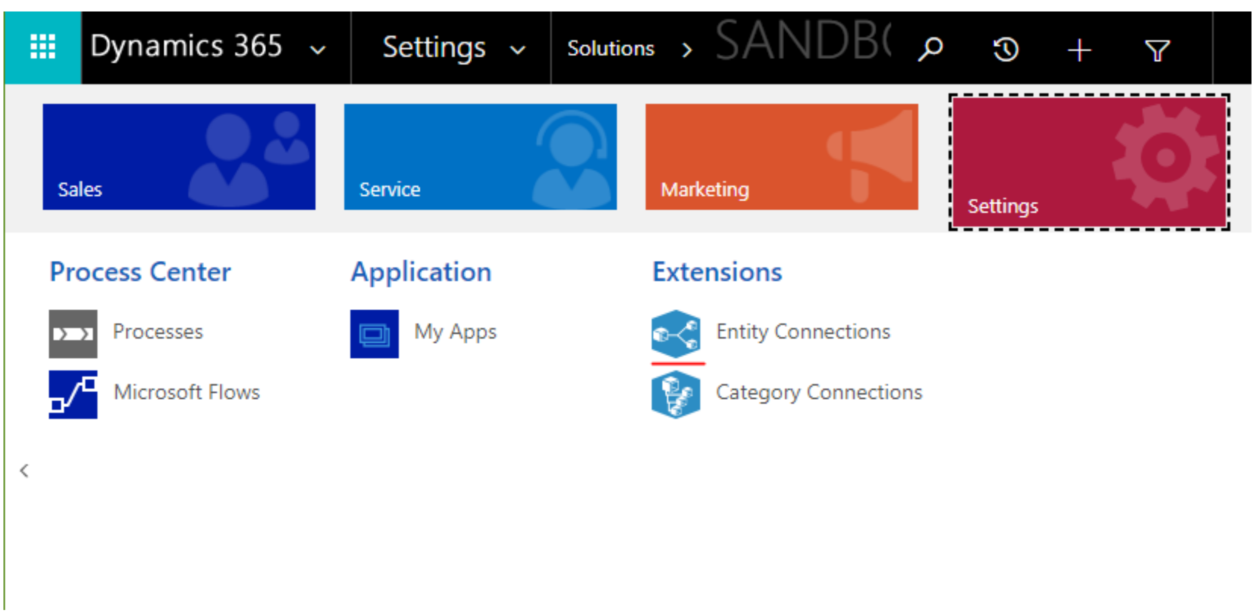


Scroll down till the Communication & Collaboration section is visible and check the connections checkbox. (Some out of the box entities are automatically enabled for connections. Once an entity is enabled for connections, the connections checkbox cannot be disabled).

Connections UI

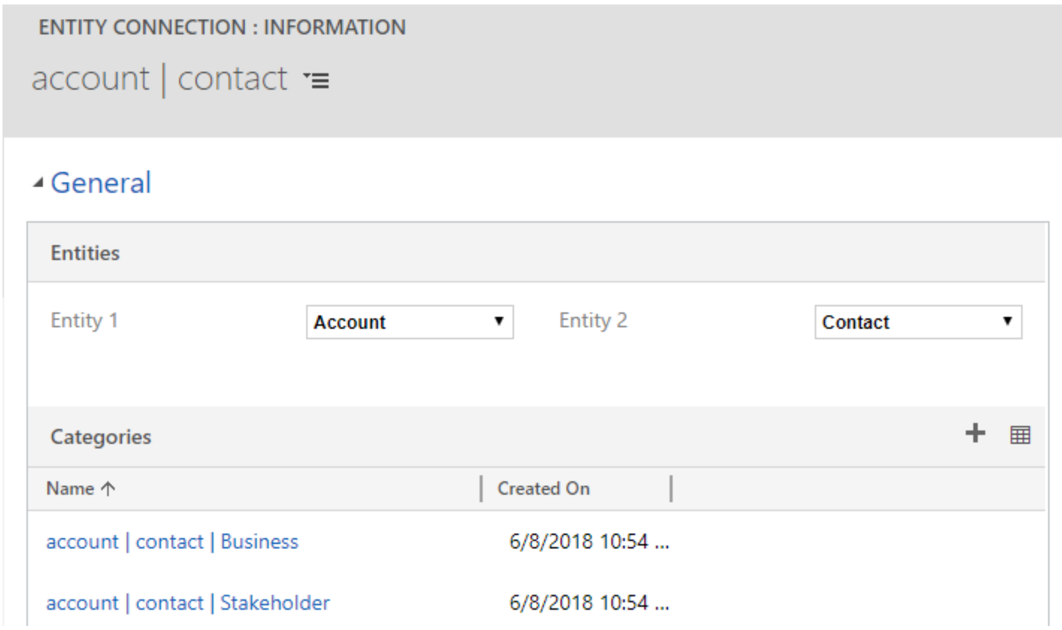


Once both entities planned to connect have connections enabled, the "Entity Connections" can be created. Navigate to the "Entity Connections" by going to Settings>> Entity Connections

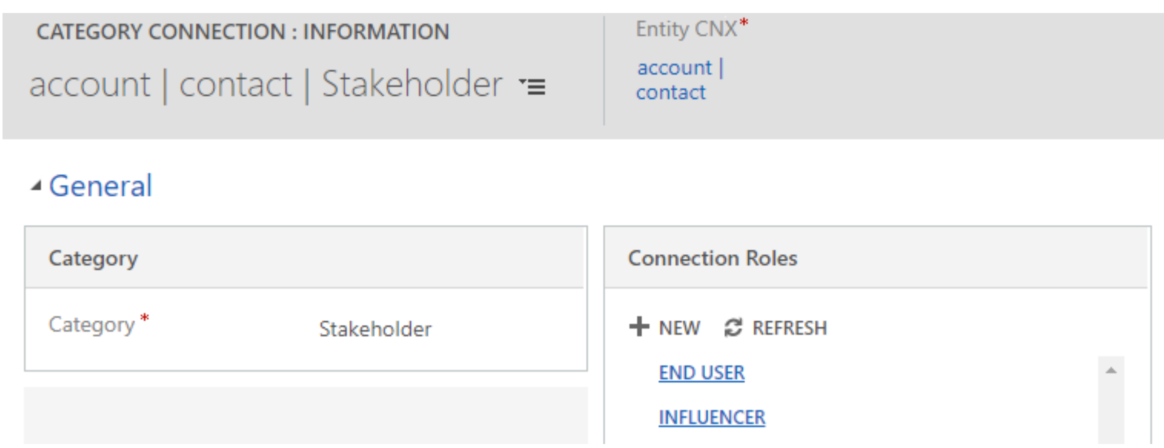


Connections UI

To create a new “Entity Connection”, Select the two entities to connect in the Entity 1 and Entity 2 fields (The order doesn’t matter). Then Save to enable the association of Categories.

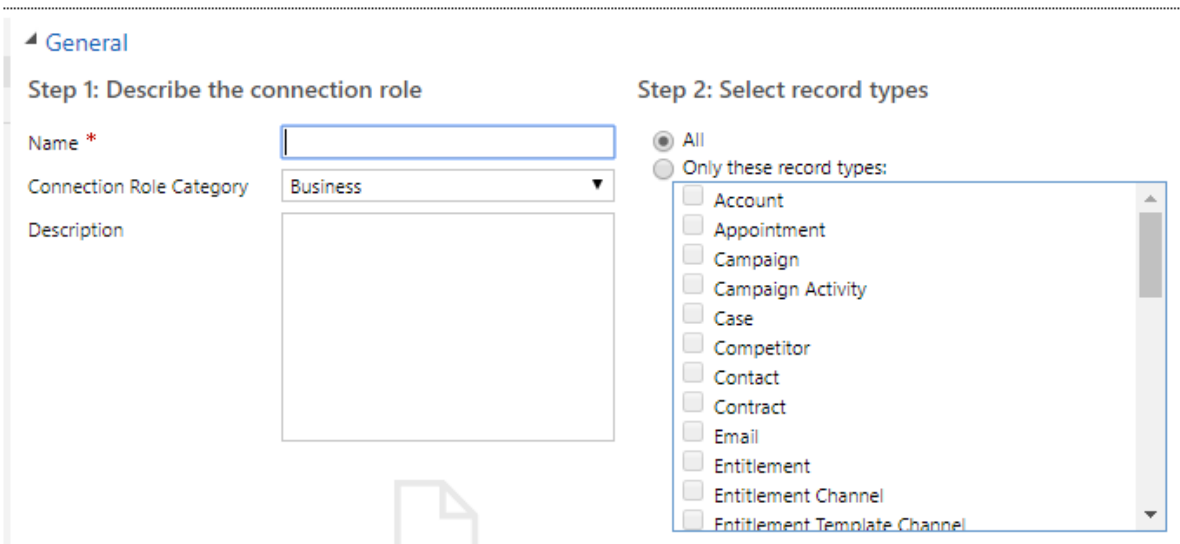


The categories can be assigned to connection roles through the “Category Connections” entity. connection roles are used to describe the relationship between the two entities. For example, if a contact (Frank R.) is associated with a product (Steel), his connection role could be “Product Manager”



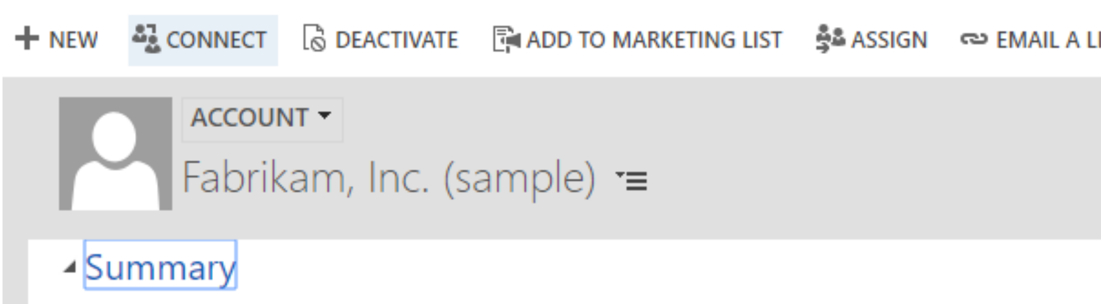
Connections UI

New connection roles are configured through the out of the box "Connection Role" entity. In "Step 1" the connection role category will automatically be selected as the category the connection role form was opened from. In "Step 2" select "All" if the connection role is applicable to all entities. If only certain entities are applicable, select "only these records types" and check each entity individually.

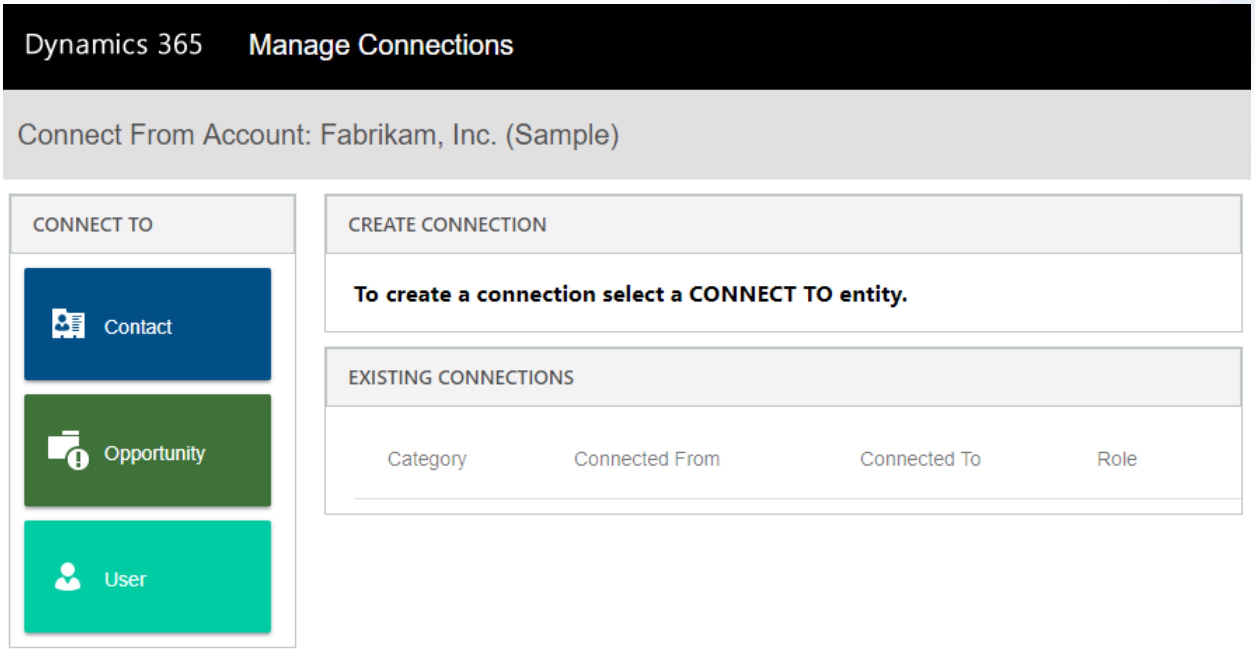


Create Connections

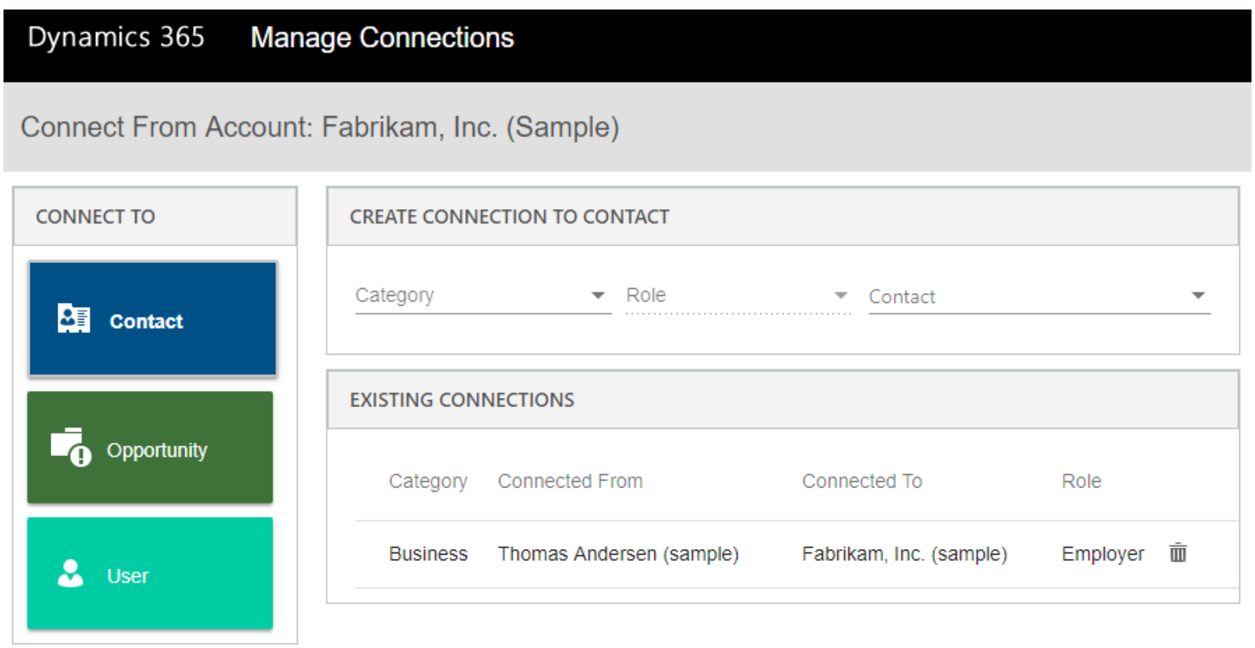
Connections are created by clicking the "CONNECT" button on the form ribbon of an entity configured for connections.



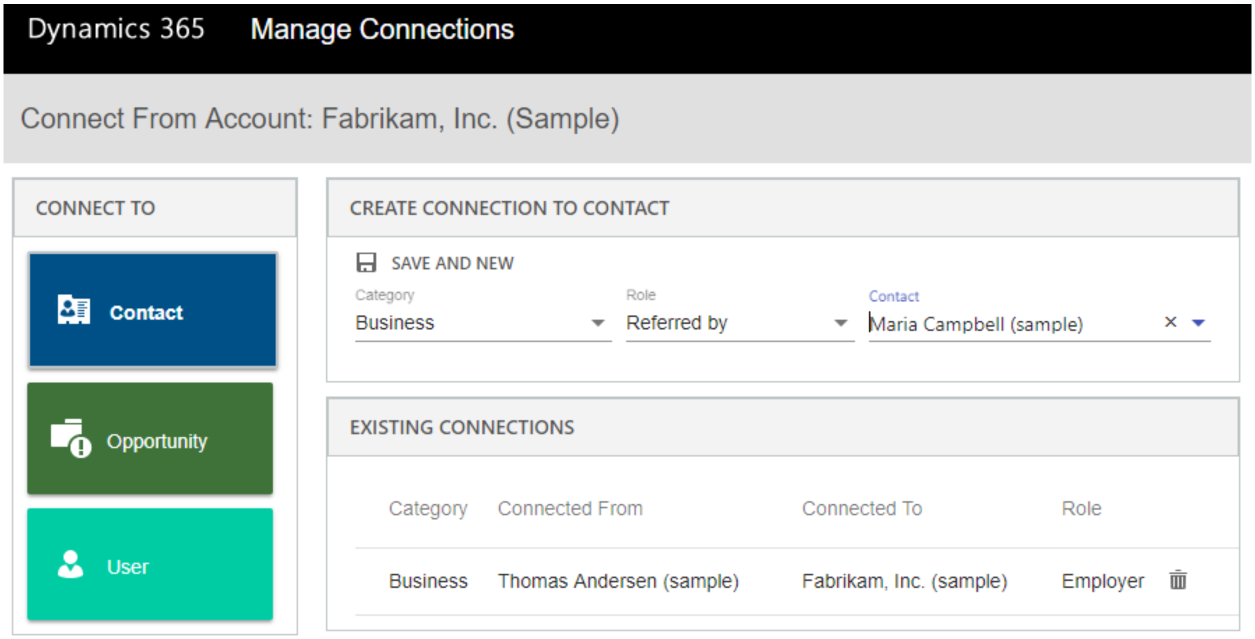
This opens the Connection UI window. The top grey bar shows the name of the entity and the record for the "Connect From".



Select an entity in the left-hand navigation to “Connect To”. The right-hand side now shows the controls to create a connection and the existing connections between the two entities.



To create a connection, select a category. The roles will populate with all connection roles associated to the selected category. Then select the entity record to associate the connection with. The “Save and New” button will appear. The “Save and New” button will save the connection and clear the create connection fields allowing for another connection to be easily created.



Once created the connection will be visible in the "Existing Connections" section. To delete a connection, click the trash can icon to delete any existing connections between the two entities.