

**Map My
Relationships**

Mind Map Visualization of Dynamics 365 CRM Records



Key Features

360 degrees view

Get 360 degrees view of all important data of the record in a single view.

Easy Navigation

Navigate easily and quickly to any of the records in the relationship.

Relationships

Support for 1:N, N:1 as well as N:N information.

View important details

Begin with a quick summary with the ability to drill down to the details.

Perform quick Actions

Ability to quickly record any activity like phone call or appointment for the related records.

Entity Support

Support both OOB and Custom entities.

Grouping & Aggregation

Support for viewing aggregate values without the need for creating rollup fields.

Configuration

Control can be configured for Unified, Mobile and Tablet experience.

Available For

SUPPORTED VERSIONS

- MICROSOFT DYNAMICS 365 v9.1 and above
- Power Apps
- CDS

DEPLOYMENTS

- DYNAMICS 365 ONLINE

Basic Control Configuration

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 & Customer (SingleLine.Text)	
One to Many Relationships		
Many to One Relationships		
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

OK

Cancel

Advanced Configuration

Dynamics 365

Map My Relationships

Map My Relationship > Entity Configurations

Home

Recent

Pinned

Settings

Entity Configurations

License Registration

Show Chart

New

Delete

Refresh

Email a Link

Flow

Run Report

Excel Templates

Export to Excel

Active Entity Configurations

Search for records

✓ Name	↑ Entity	Created On
Case	incident	11/14/2019 11:30 PM
Customer	account	11/7/2019 2:07 PM

Configure Entity

Customer

Entity Configuration

Sam G

Owner

11/7/2019 2:07 PM

Created On

General

Related

Name

*

Customer

Entity *

Account (Account)

Entity Node Setting

Entity Node Image

Entity Image

Entity Relationships

...

✓	Relationship T...	Name	↑	Entity Configuration
	Many-to-one	account_primary_contact		Customer
	One-to-many	contact_customer_accounts		Customer
	One-to-many	lead_customer_accounts		Customer
	One-to-many	opportunity_customer_accounts		Customer

5 - 8 of 8 (0 selected)

⏪ ⏩ Page 2 ⏪ ⏩

Configure Relationships & Additional Settings

opportunity_customer_accounts

Entity Relationship


Sam G
Owner

11/15/2019 12:56 AM
Created On

General Related

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

Relationship * opportunity_customer_accounts(opportun... ▼

Entity Configuration *  **Customer**

Node Settings

Relationship Node
Image

Entity Image

Allowed Actions

× Appointment (Appointment) ▼

Fields to show on
Tooltip

× Potential Customer (customerid) ▼

Cluster Settings

Group By

Status (statecode) ▼

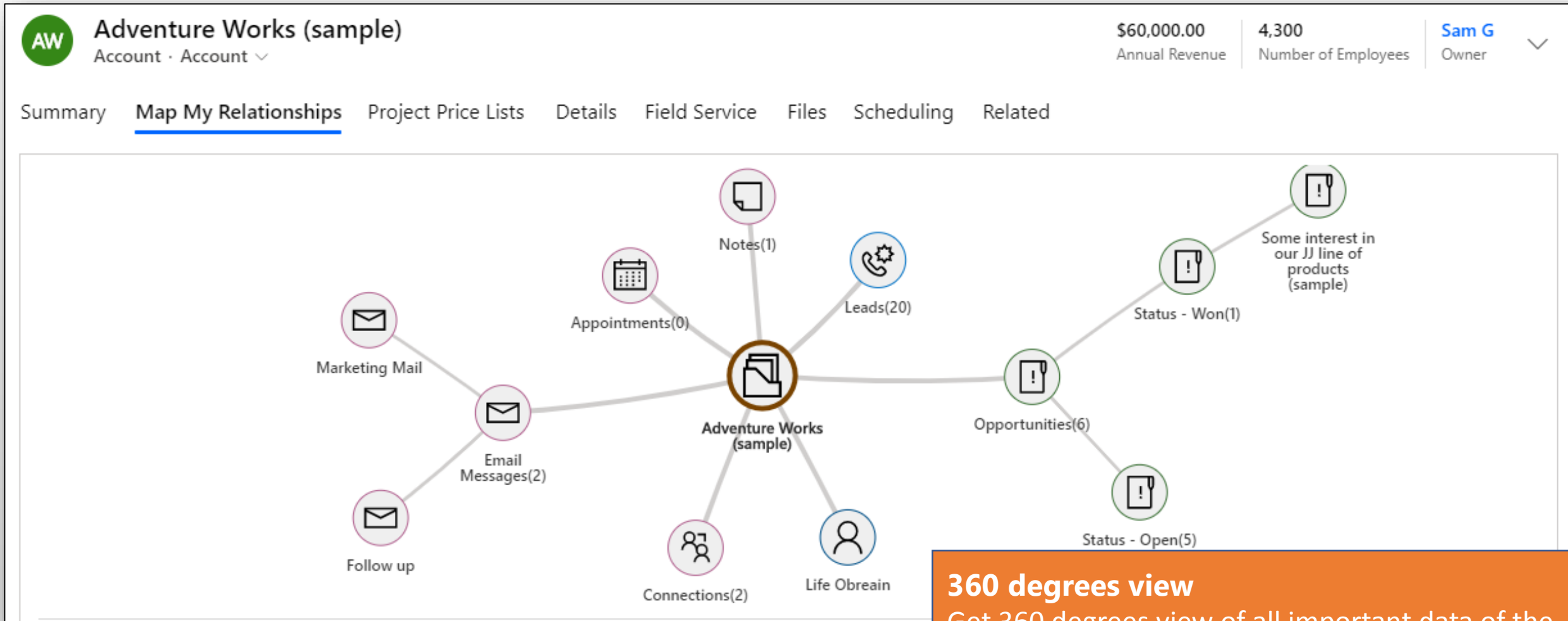
Measure

Est. Revenue (estimatedvalue) ▼

Aggregate Type

AVG

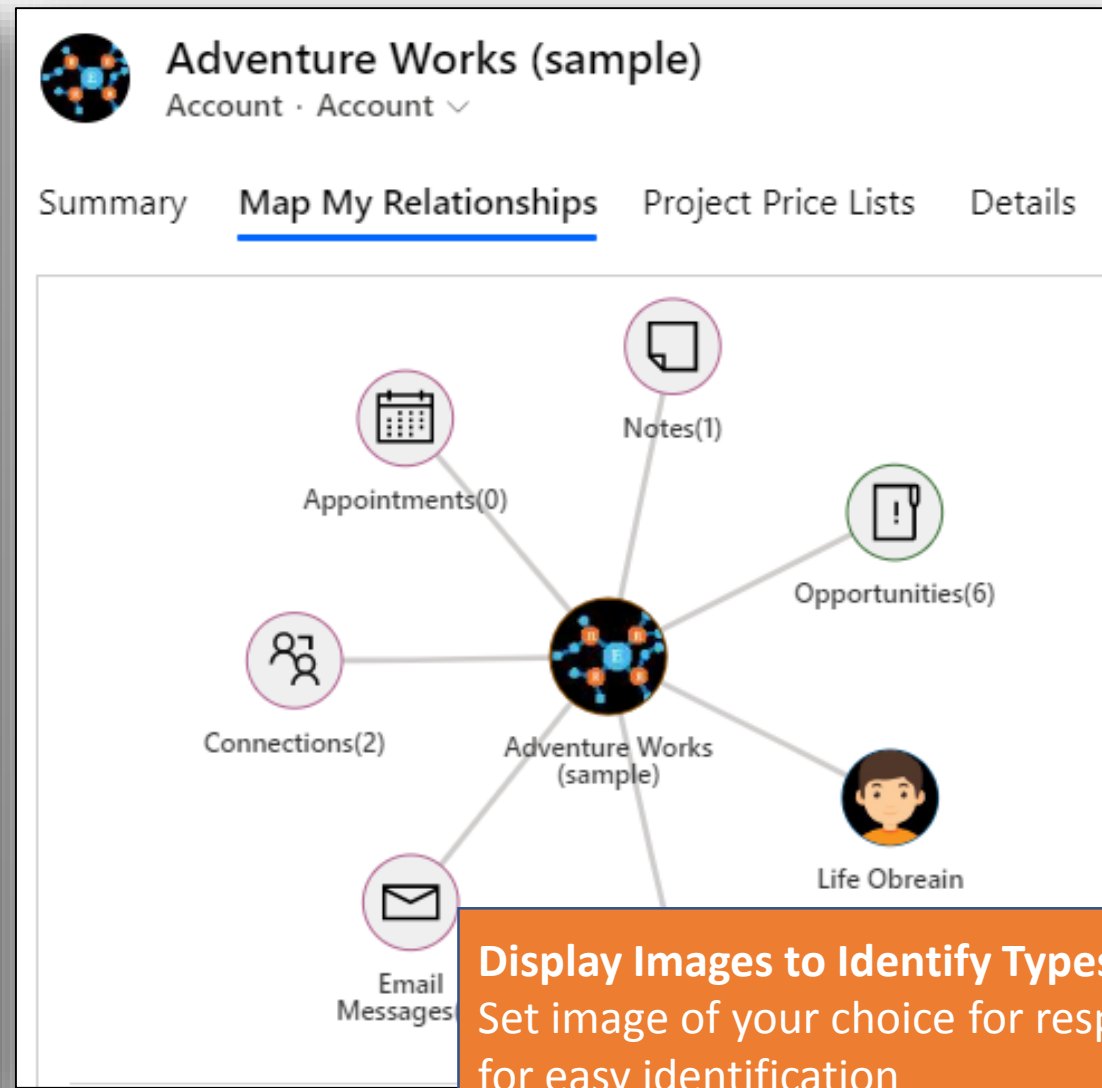
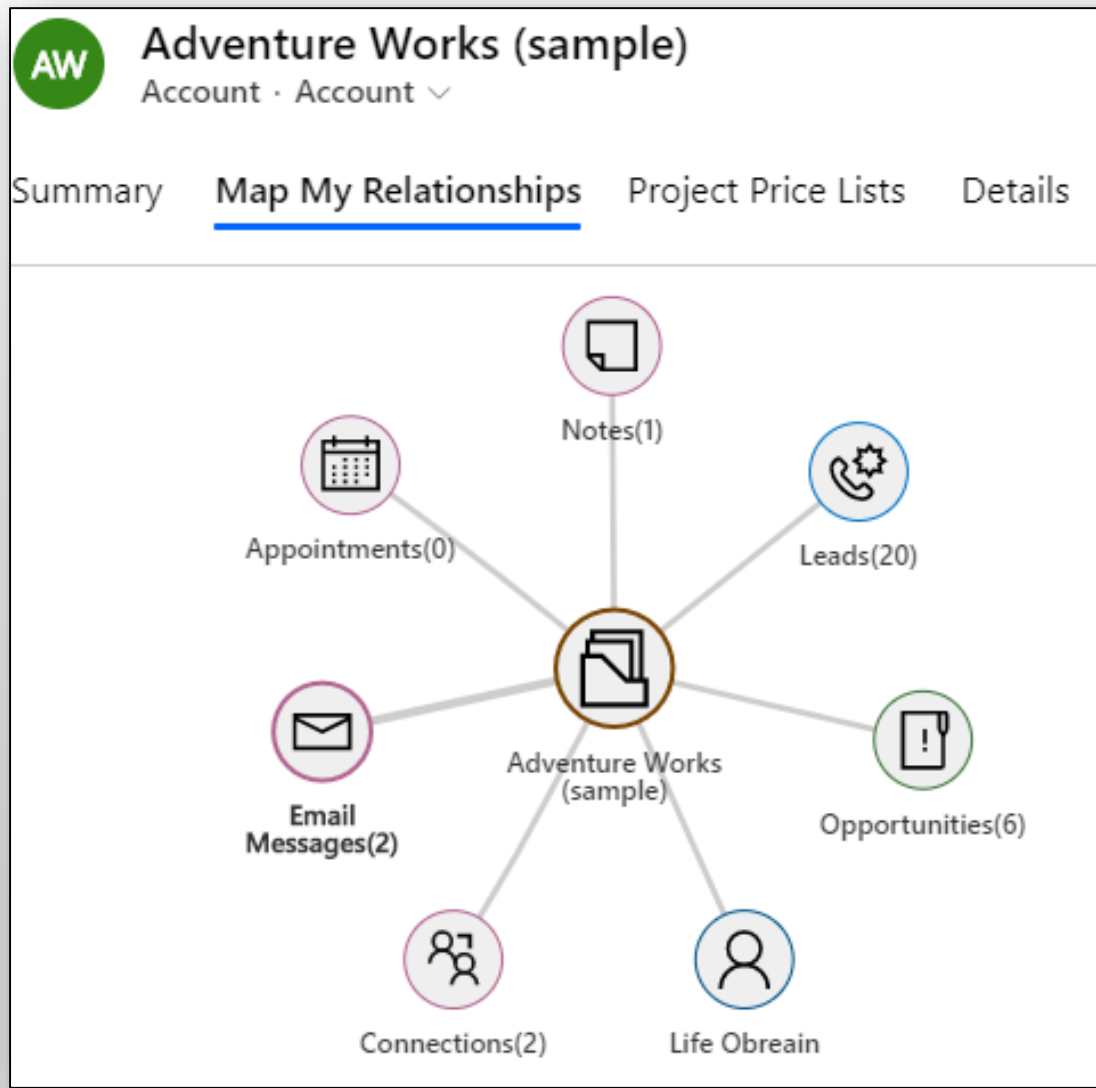
360 degrees view of data



360 degrees view

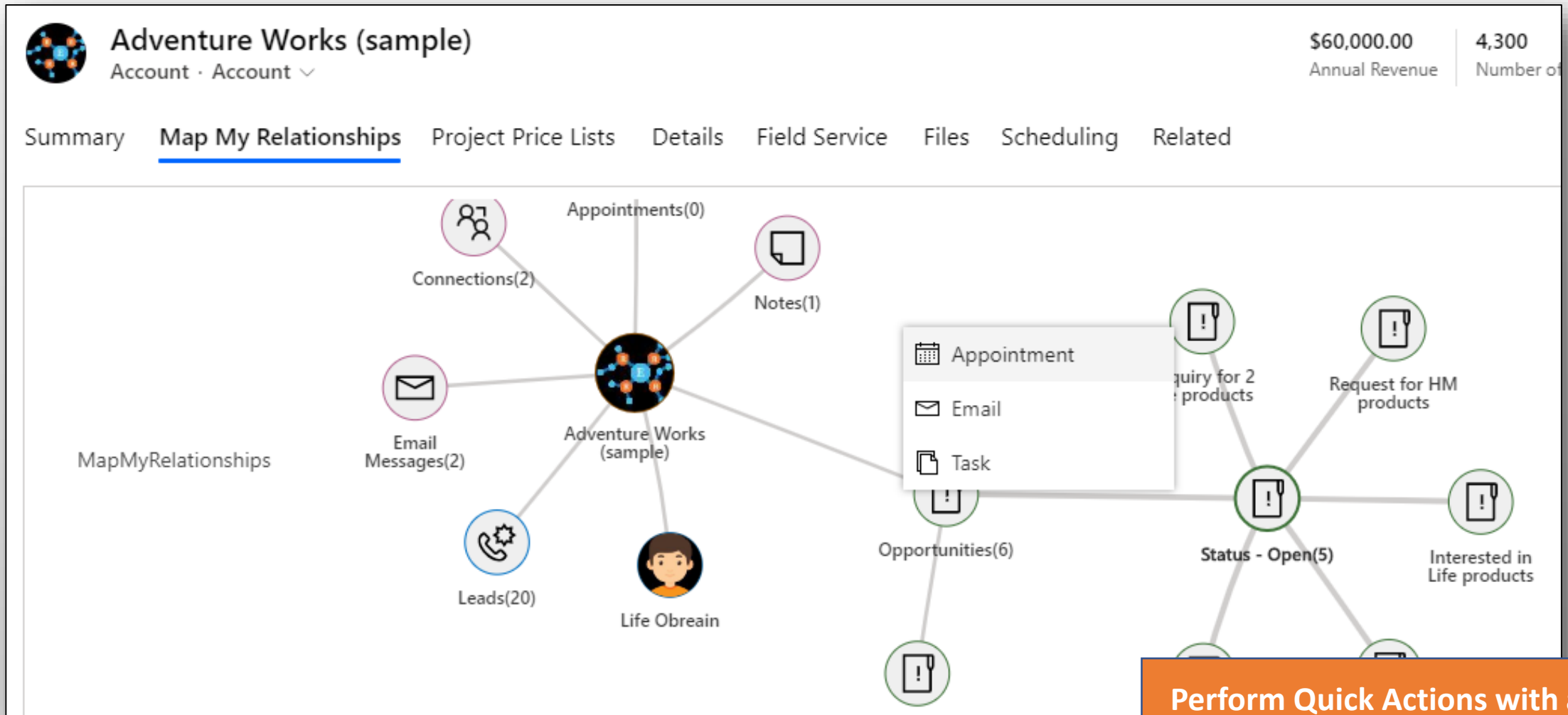
Get 360 degrees view of all important data of the record in a single view.

Display Images to Identify Types of Records



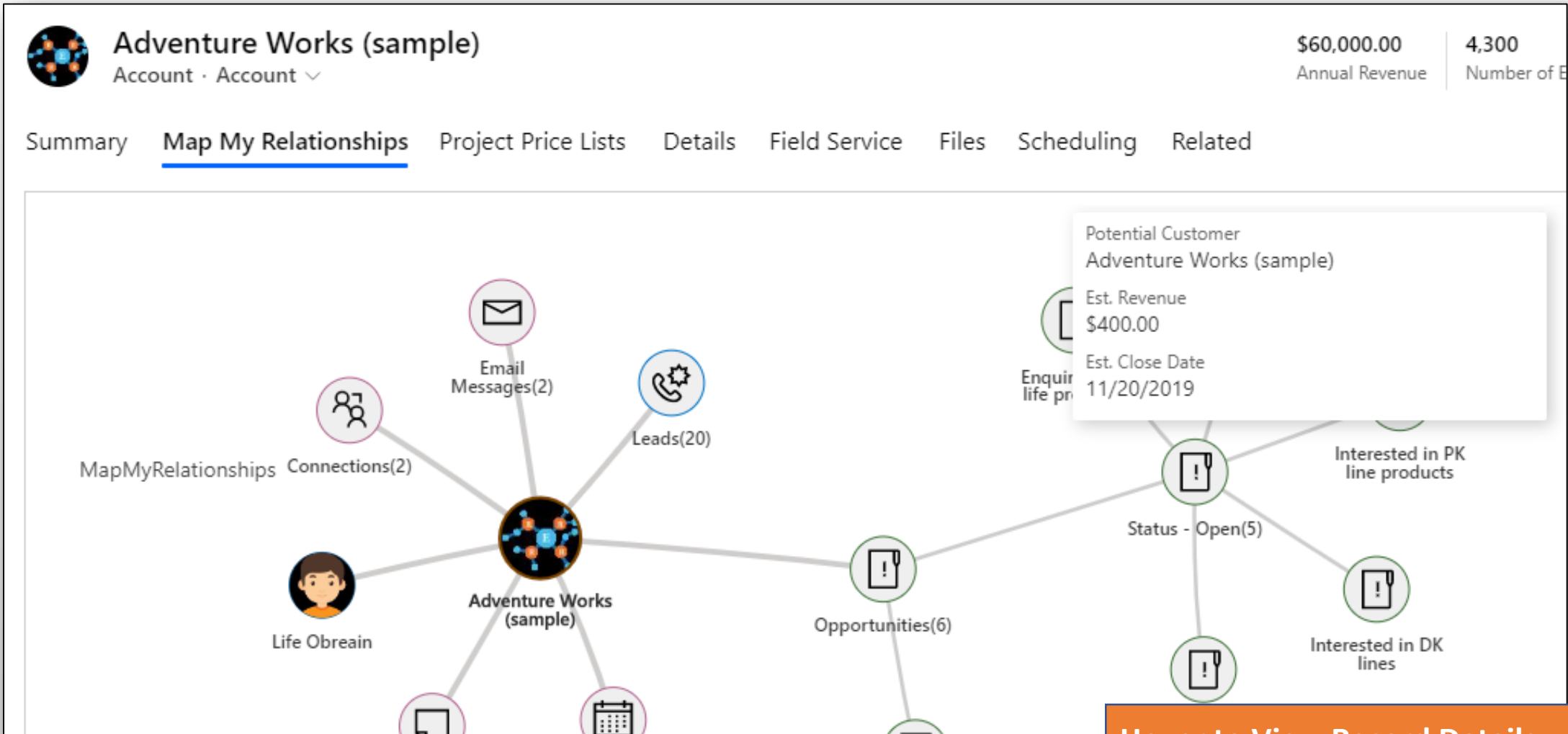
Display Images to Identify Types of Records
Set image of your choice for respective records
for easy identification

Perform Quick Actions with a Click



Perform Quick Actions with a Click
create quick activity records without
navigating to entity records

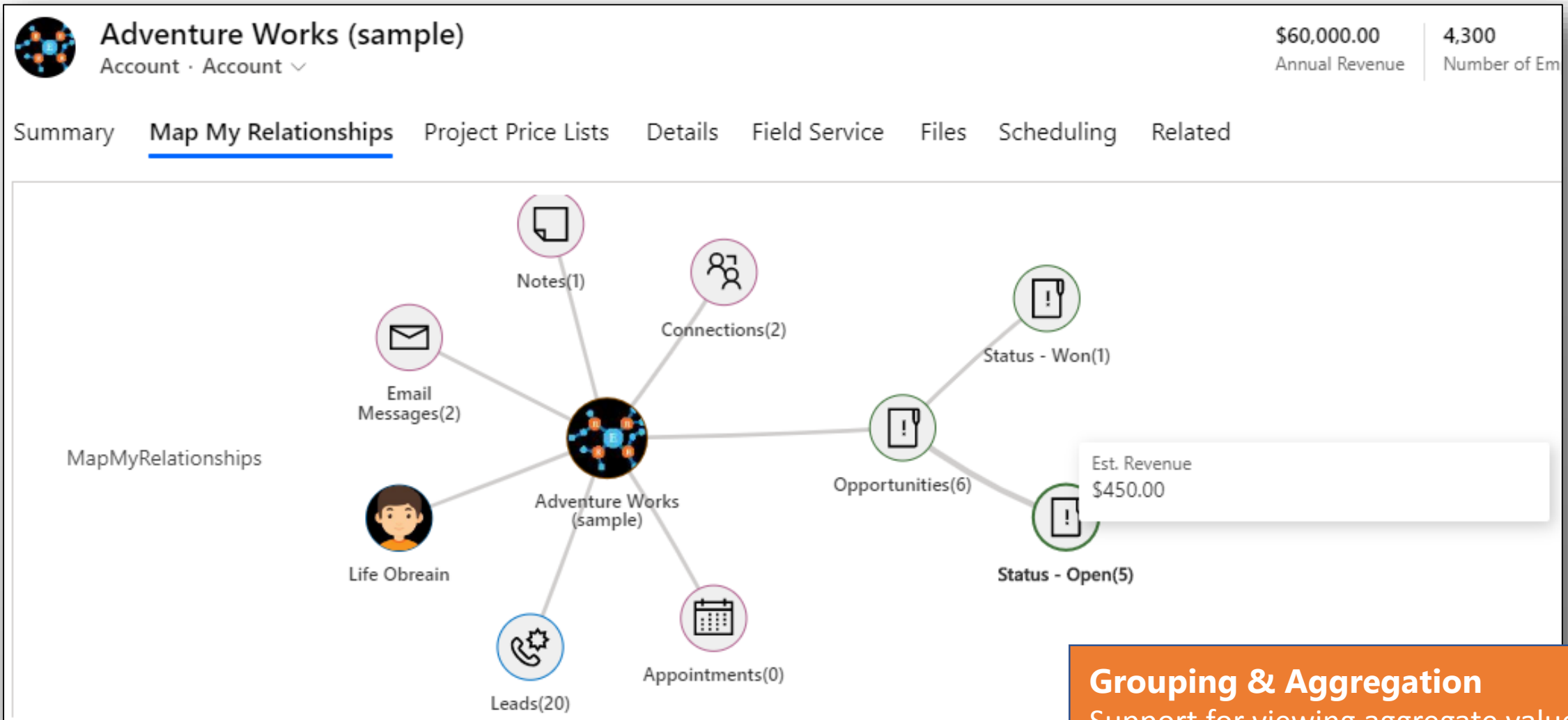
Hover to View Record Details



Hover to View Record Details

View details of records just by hovering the cursor on the respective record

Grouping & Aggregation



Grouping & Aggregation

Support for viewing aggregate values without the need for creating rollup fields.

Next Steps

Learn more about [Map My Relationships](#) today.

Get your free **Map My Relationships** trial from [Microsoft AppSource](#) or [our website!](#)

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