



User Manual

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Introduction

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. 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.

Salient 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 the need for creating rollup fields
- Control can be configured for Unified, Mobile and Tablet experience

Available for: Microsoft Dynamics 365 CRM 9.1 and Above

Deployment: Online

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.

Map My Relationships Configuration

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 deafault actions (Create email, Phone	Yes	Yes
Call and Task)		
Configure tooltips to see more information of	No	Yes
related records		
Configure which actions to allow for related	No	Yes
records		
Configure which images to display to identify	No	Yes
related records		
Configure grouping and aggregation for related	No	Yes
records		

Map My Relationships with 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.

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

N	lap My Relationship	os – User Man	ual
Uynamics 365 🗸 Settings	 Customizations 		
Customization			
	Solution: Default Solution - Micro	osoft Dynamics 365 - Googl	e Chrome
Which feature would you like to work with?	a crmworks48.crm8.dynamic	s.com/tools/solution/ed	lit.aspx?id=%7bfd140aaf-4di
Customize the System Create, modify, or delete components in your orga processes, and others.	PowerApps		
Solutions Create, modify, export, or import a managed or un	rr File 🚽 ⊨🛱 Show Depender	ncies 🛛 블 Solution Layers	Publish 🏼 🚰 Manager
Themes Adjust your organization's colors. Create, change,			
	Solution Default Solution	General Primary Field	Controls
	Components	Entity Definition	
	▲ Entities		
	Account Account Project Pri	Display Name *	Account
	> Action Card Action	Piural Name *	Accounts

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

Account				
Solution Default Solution	System Forms Active Forms 🗸			
Components	🗌 New 🗸 🗙 Delete 🛛 🚳 Enable	Security Roles 🛛 📑 Form	m Order 🕶 瀫 Activa	ate 🛛 🥰 Deactivate
Account	Name	Form State	Form Type 🛧	State
Views Charts	Account Card form	Active	Card	Managed
Fields	Account for Interactive ex	perie Active	Main	Managed
a 1:N Relationships	Account - Mobile	Active	Main	Managed
N:N Relationshi	Sales Insights	Active	Main	Managed
Business Rules	Account	Active	Main	Managed
Dashboards	Account Quick Create	Active	Quick Create	Managed
 Action Card Action Action Card Regard 	Account Summary Card	Active	Quick View F	Managed

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.

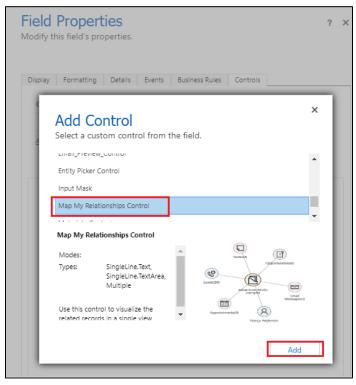
	Map	My Relationships	– User Manual	
PowerApps FILE HOME INSERT Save As Save As Save As Save Dublicn Publicn Publicn	- Dedo	Enable Security Roles Since Security	Merce	Ø
Save	Edit Select	Form	Upgrade	
•	high density to display more data. Use the new form desig		(- p. st	
Account Summary Map My Relationships Project Price Liss Details Price Service File Common Playnools Activities Social Profiles Contacts	Solution: Default Solution Form: Account			Field Explorer ▶ Filter Custom Fields ♥ Only show unused fields ■ External ID ■ MaxWyRelationships ■ Pretered Resource (Deprecated) ■ Presence ■ Travel Charge (Base)
Connections Coursents Audit History Actuals Entitlement Applica Resource Preferences Opportunity Lines	Map My Relationships New Tab Section Project Price Lists			
Ouotes	· · · · · · · · · · · · · · · · · · ·			

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.

		Events Busin	ness Rules (Controls		
Control		١	Veb Pho	ne Table	t	
Text Box (de				۲		
Add Control.						
	Select or add a	custom contr	ol to see its	configurati	on.	

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)

Id Properties ify this field's properties						? X
olay Formatting Details	Events	Business Ru	les Contr	ols		
ontrol		Web	Phone	Tablet		
Text Box (default)		۲	۲	۲		
Map My Relationships Control		0	0	0	×	:
dd Control						
Vap My Relationships Control Property Field *	Value	apmyrelations	hips			•
Map My Relationship Control .					0	
One to Many Relationships					0	
Many to One Relationships					Ø	
Many to Many Relationships					O	
Allow Action?					Ø	•
One to Many Relationships compatible types: SingleLine.Te comma seperated list of one to						
Hide Default Control						

One to Many Relationships: Enter the comma seperated 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 seperated 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 seperated many to many relationship schema name.

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.

6. Click the edit button which is present against the property. This will open a 'Configure Property...' window.

Field Propert Modify this field's pro						? X
Display Formatting	Details Events	Business Rul	es Contro	ls		
Control		Web	Phone	Tablet		
Text Box (default)		۲	۲	۲		
Map My Relationship	s Control	\bigcirc	0	0	×	
Add Control						
Map My Relationships Property	s Control Value					•
Field *	new_m	apmyrelations	nips			
Map My Relationship	Control				0	
One to Many Relation	nships				0	
Many to One Relation	nships				Ø	
Many to Many Relation	onships				Ø	
Allow Action?					2 ·	•
	ships gleLine.Text, SingleLine of one to many relatio					
Hide Default Cont	rol					

7. Select 'Bind to a static value' and enter the comma seperated relationship schema name.

6 -14		
field		
one to many re	lationship schem	a name
-	-	
•	one to many re	one to many relationship schem

8. Repeate the above step for the other properties and fill the details.

splay Formatting Details	Events	Business Ru	les Contro	ols		
Control		Web	Phone	Tablet		
Text Box (default)		۲	۲	۲		
Map My Relationships Control					×	
Add Control						
Field • Map My Relationship Control	-	napmyrelations			0	•
One to Many Relationships		nt_Emails, Acco	-		0	
Many to One Relationships Many to Many Relationships	accour	nt_originating_	lead, account	prim	0	
Allow Action?					0	
Many to Many Relationships Compatible types: SingleLine.Text, Comma seperated list of many to r	-					

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

splay Formatting	Details	Events	Business Rule	es Contro	ols		
Control			Web	Phone	Tablet		
Text Box (default)			\bigcirc	\bigcirc	\bigcirc		
Map My Relationshi	ps Control		۲	۲	۲	×	
Add Control							
	C						
Map My Relationship	os Control						
Field *		new_m	apmyrelationsh	ips			U
Map My Relationshi	p Control					0	1
One to Many Relation	onships	Accoun	t_Emails, Accou	unt_PhoneCa	lls (Si	Ø	1
Many to One Relation	onships	accoun	t_originating_le	ad, account	prim	Ø	1
Many to Many Relat	tionships					Ø	1
Allow Action?						0	Ŧ
Many to Many Relati Compatible types: Si Comma seperated lis	ngleLine.Text,	-					

10. Go to 'Display' field properties and uncheck 'Display label on the form'.

Tield Properties Nodify this field's properties.	? :
Display Formatting Details Events Business Rules Controls	
Label	
Specify the label for this field in forms.	
Label * MapMyRelationships	
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	

11. Save form and publish customizations.

	Ma	ap My Relatio	onships – Use	er Man	ual			
FILE HOME INSERT	Change Remove Properties	← Undo → Redo Body	Footer	Business Rules	Form Properties	Preview	Enable Security Roles Show Dependencies Managed Properties	Merge Forms
Save	Edit		Select			Form	n	Upgrade
i Form headers now defa	ult to high density to	o display more data.	Use the new form d	esigner to e	edit header	r density.	Learn more	
Account Summary Map My Polationships	-	Solution: Defau Form: Acco	ult Solution Dunt					

12. After publishing successfully navigate to the record and check if the Map My Relationship control is working or not.

	Datum Corporation	(sample)				
Summary	Map My Relationships	Project Price Lists	Details	Field Service	Files	Schedu
	Rene Vales	A. Datum Corporation (sample)		nail ages(2)		

13. 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 Advanced Configuration

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.

	Durantin 200 variation			
	Dynamics 365 V Settings	У Му Аррз		
<u>∧</u> Ye	ou are using apps designed for the	e legacy web client. For best results, u	pdate your apps to Unified Interface.	
Q,	Search my apps			
•	Published Apps (12)			
	Þ	¢	ବ	V
	 Dynamics 365 — custom	 Connected Field Service	 Customer Service	 Customer Service Hub
	Provides access to the full suite of capabilities, including administration	Use Connected Field Service to monitor connected devices to make	Empower agents to manage cases and allow service managers to set	A focused, interactive experience for managing your customer service.
	Microsoft Dynamics 365 11/25/2019	Dynamics 365	Dynamics 365	Default Publisher for crmworks48 10/13/2019
	WEB		WEB	UNIFIED INTERFACE
	\bigcirc	Ŕ	₽	₽
	Field Service	Map My Relationships	Project Resource Hub	Project Service
	Field Service allows organizations to deliver intelligent, world class field	Visualize Entity relationships in a single view. Navigate easily from	Project Resource Hub Module	Project Service Automation Application.
	Dynamics 365	Default Publisher for crmworks48 11/15/2019	Dynamics 365	Dynamics 365
	UNIFIED INTERFACE	UNIFIED INTERFACE	UNIFIED INTERFACE	UNIFIED INTERFACE

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III Dynamics 365 🗸	Map My Relationships	
	🗟 Save & Close + New ₀⁄ª Flow ∨	
企 Home	New Entity Configuration	
🕒 Recent 🗸 🗸		
🖈 Pinned 🗸 🗸	General	
Settings Image: Setting Configurations Image: Setting Configuration Image: License Registration	Name * Entity* Select	Entity Relationships
	Entity Node Setting Entity Node Image Entity Image	

- **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.
- **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.
- Entity Relationships: The subgrid of 'Entity Relationships'.

		Map My Relationship	s – User Manual		
	Dynamics 365 🗸	Nap My Relationships 🛛 Map My Relationship 💈 Entity Conf	igurations > Account - Pre Sales Prod	cess	<i>ک</i> ک
=		+ New 🗋 Deactivate 🛍 Delete 🖒 Refresh	🞗 Assign 🖻 Share 🖙] Email a Link ₀/ª Flow ∨	🖷 Word Templates 🛛 🗸
6) (-)		Account - Pre Sales Process Entity Configuration			
\$	Pinned 🗸	General Related			
Set	tings	Name * Account - Pre Sales P	ocess	Entity Relationsh	nips
් (0)	Entity Configurations License Registration	Entity • Account (Account)	× *	✓ Relationship	T Name
		Entity Node Setting Entity Node Image Entity Image		4	No data ava

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.

Account - Pre Sales Entity Configuration General Related	Process		Owner Created On
Name	* Account - Pre Sales Process	Entity Relationships	
Entity *	Account (Account) × *	✓ Relationship T Name	New Entity Relationship
Entity Node Setting		No data a	
Entity Node Image	Entity Image	4	Expert Entity Relationships > See associated records

ew Entity Relatior	nship		Owner
neral			Owner
Relationship Type	* One-to-many	Entity Configuration	n * 🐼 Account - Pre Sales Process
Relationship *	Select	v	
Node Settings		Cluster Settings	
Relationship Node Image	Entity Image	Group By	Select
Allowed Actions	Select	Measure	Select
Fields to show on Tooltip	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.
- **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.
- Fields to show 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.
- **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.
- **Measure**: A list of fields of the related entity. Select a field, the selected field will displayed as a tooltip of the grouped node with aggregation.
- **Aggregate Type**: Aggregation option. Options are COUNT, MAX, MIN, SUM and AVG. The Measure field will be aggregated based on the Aggregate Type option.

	nship	Owner C
General		
Relationship Type	* One-to-many	Entity Configuration * 🔯 Account - Pre Sales Process
Relationship *	opportunity_customer_accounts(opportu x *	
Node Settings		Cluster Settings
Relationship Node Image	Entity Image	Group By Status (statecode) x
Allowed Actions	× Appointment (Appointment) × ÷	Measure Est. Revenue (estimatedvalue) ×

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.

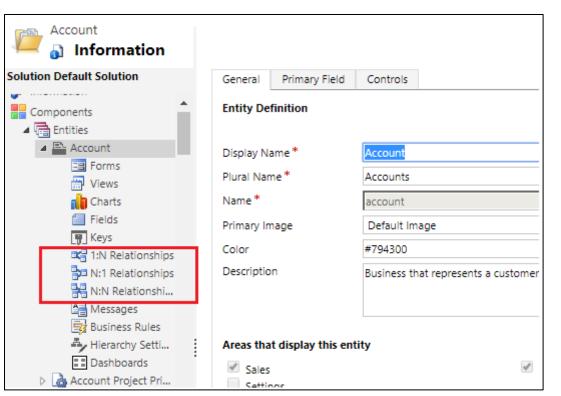
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splay Formatting Details	Events	Business Rule				
Control		Web	Phone	Tablet		
Text Box (default)		0	0	0		
Map My Relationships Control		۲	۲	۲	×	
						-
Property	Value					•
Field *	new_ma	apmyrelations			ß	*
Field * Map My Relationship Control	new_ma	t - Pre Sales Pr	rocess (Single		Ø	•
Field * Map My Relationship Control One to Many Relationships	new_ma		rocess (Single		0	
Field * Map My Relationship Control	new_ma Accoun Accoun	t - Pre Sales Pr	rocess (Single unt_PhoneCa	lls (Si	0	
Field * Map My Relationship Control One to Many Relationships	new_ma Accoun Accoun	t - Pre Sales Pr t_Emails, Acco	rocess (Single unt_PhoneCa	lls (Si		•

How to get relationship schema name?

Prerequisites: The user should have System Administrator or System customizer role.

- 1. Go to Settings \rightarrow Customizations \rightarrow Customize the Entity
- 2. Select the entity from Entities component.



3. Click on 1:N Relationships, N:1 Relationships and N:N Relationships to ge the list of relationships available in the system.

Account 📽 📲 🖓 🖓	05				
olution Default Solution	Type: All			•	
Components	😋 New 1-to-Many Relationship 🛛 🗙 📗	More Actions 👻			
🔺 🖭 Account	Schema Name 🛧	Primary Entity	Related Entity	Type of Behavior	Field Name
E Forms	account_actioncard	Account	Action Card	System	Regarding
Fields	account_activity_parties	Account	Activity Party	System	Party
1:N Relationships N:1 Relationships	Account_ActivityPointers	Account	Activity	System	Regarding
N:N Relationshi	Account_Annotation	Account	Note	Parental	Regarding
Business Rules	Account_Appointments	Account	Appointment	Parental	Regarding
Dashboards	Account_AsyncOperations	Account	System Job	System	Regarding
Action Card Action					

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

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

Relationship Account to Appoint	tment	Working on solution: De	fault Solution
A Common	General		
🖙 Information	Relationship Definition		^
-	Primary Entity *	Account Related Entity* Appointment	t 🔻
t	Name *	Account_Appointments	
+	Searchable	Yes	Ŧ
-	Hierarchical	No	Ŧ
-	Lookup Field		
h	Display Name *	Regarding Name * regardingobje	ectid
2	Field Requirement *	Optional V	
5	Description	Choose the record that the appointment relates to.	

Many-to-Many:

Relationship Account to Marketi	ing List			Working on solution: Default Sol
Common	General			
ara Information	Current Entity			
	Entity Name *	Account		
	Display Option *	Use Plural Name 🔻	Custom Label *	
	Display Area *	Details 🔻	Display Order *	10,000
	Other Entity			
	Entity Name *	Marketing List		
	Display Option *	Use Plural Name 🔹	Custom Label *	
	Display Area *	Marketing v	Display Order *	10
	Relationship Definition		_	
	Name *	listaccount_association		
	Relationship Entity Name *	listmember		
	Searchable	Yes		

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

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