

**Map My  
Relationships**

**Visualize Entity  
Relationships in a  
single view**



# Key Features

## 360 degrees view of all related data

View one to many, many to one and many to many related records in a single place in a network style UI.

## Easy Navigation

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

## View important details

Configure tooltips to see important information on the UI.

## Perform quick Actions

Perform quick actions like create Phone Call, Email or Appointment for the related entity records.

## Grouping & Aggregation

Configure the control to view related records by adding grouping and aggregation.

## Basic & Advanced Configuration

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

# Available For

## SUPPORTED VERSIONS

- MICROSOFT DYNAMICS 365 v9.1 and above

## 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

Search for records

Active Entity Configurations

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)

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# 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)** ▼

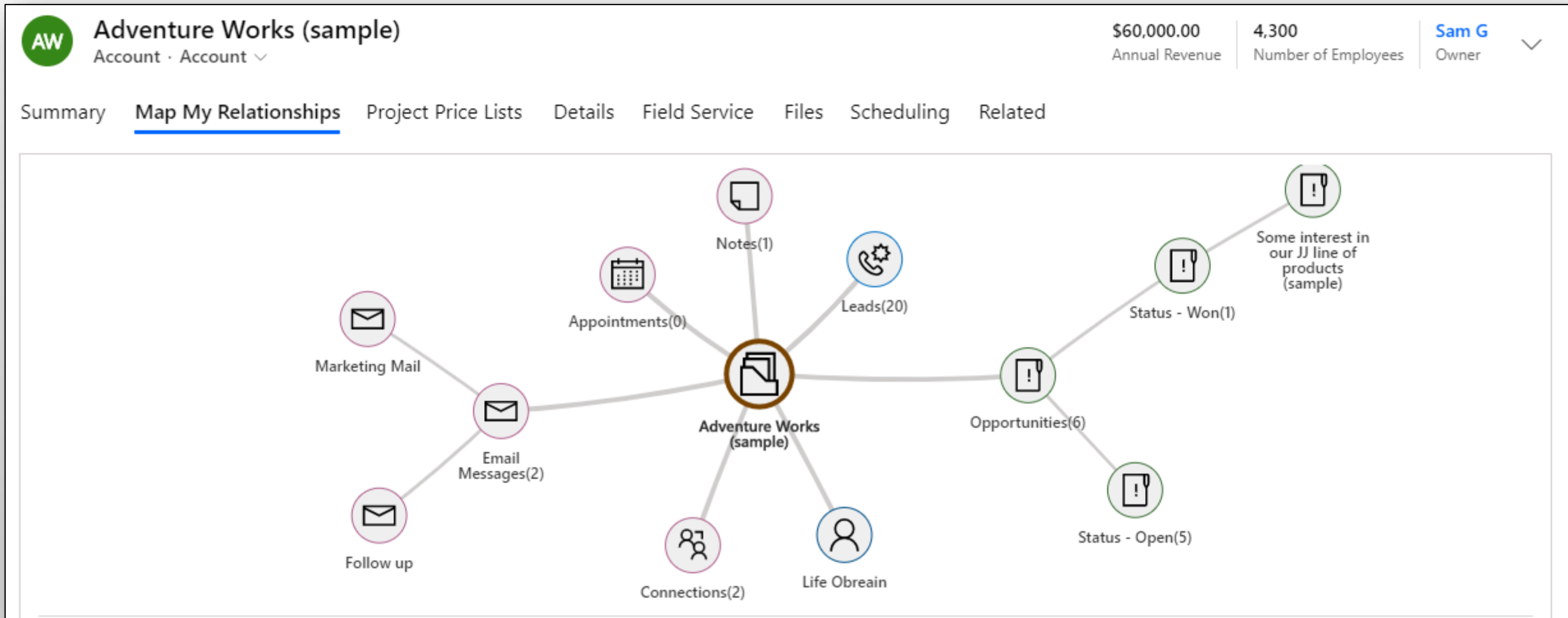
### Cluster Settings

Group By Status (statecode) ▼

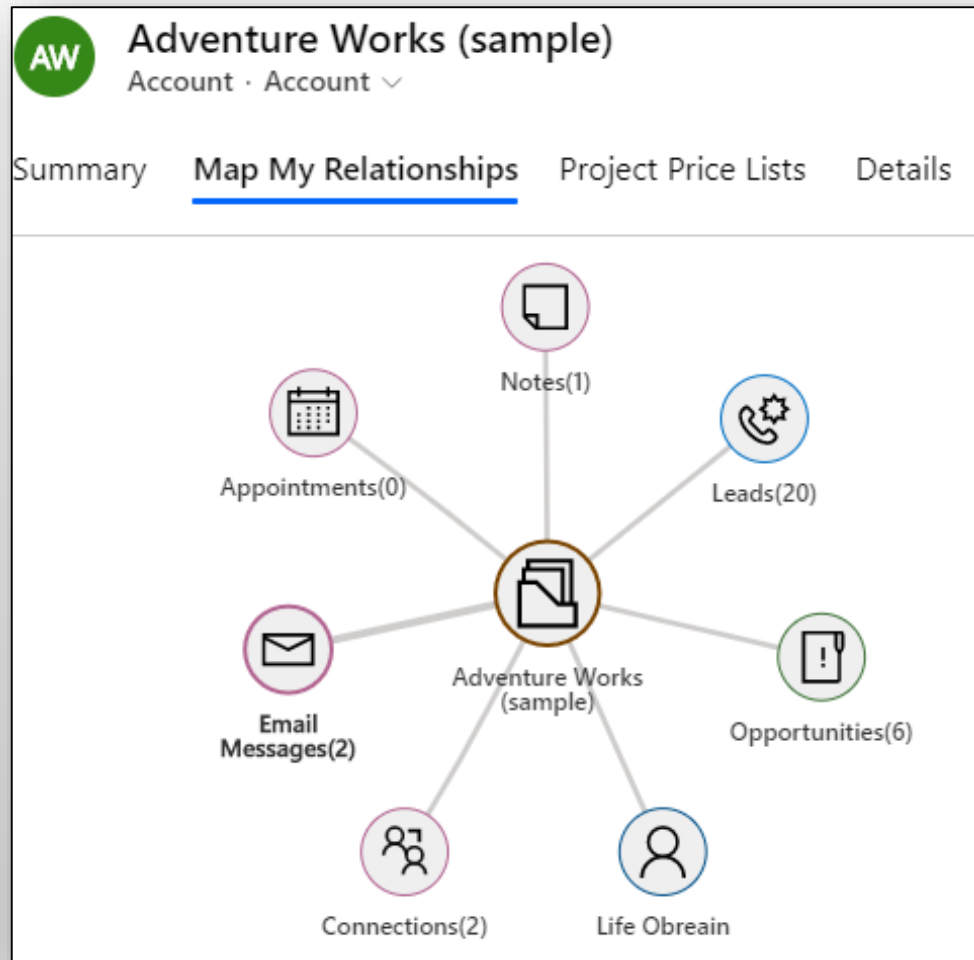
Measure Est. Revenue (estimatedvalue) ▼

Aggregate Type **AVG**

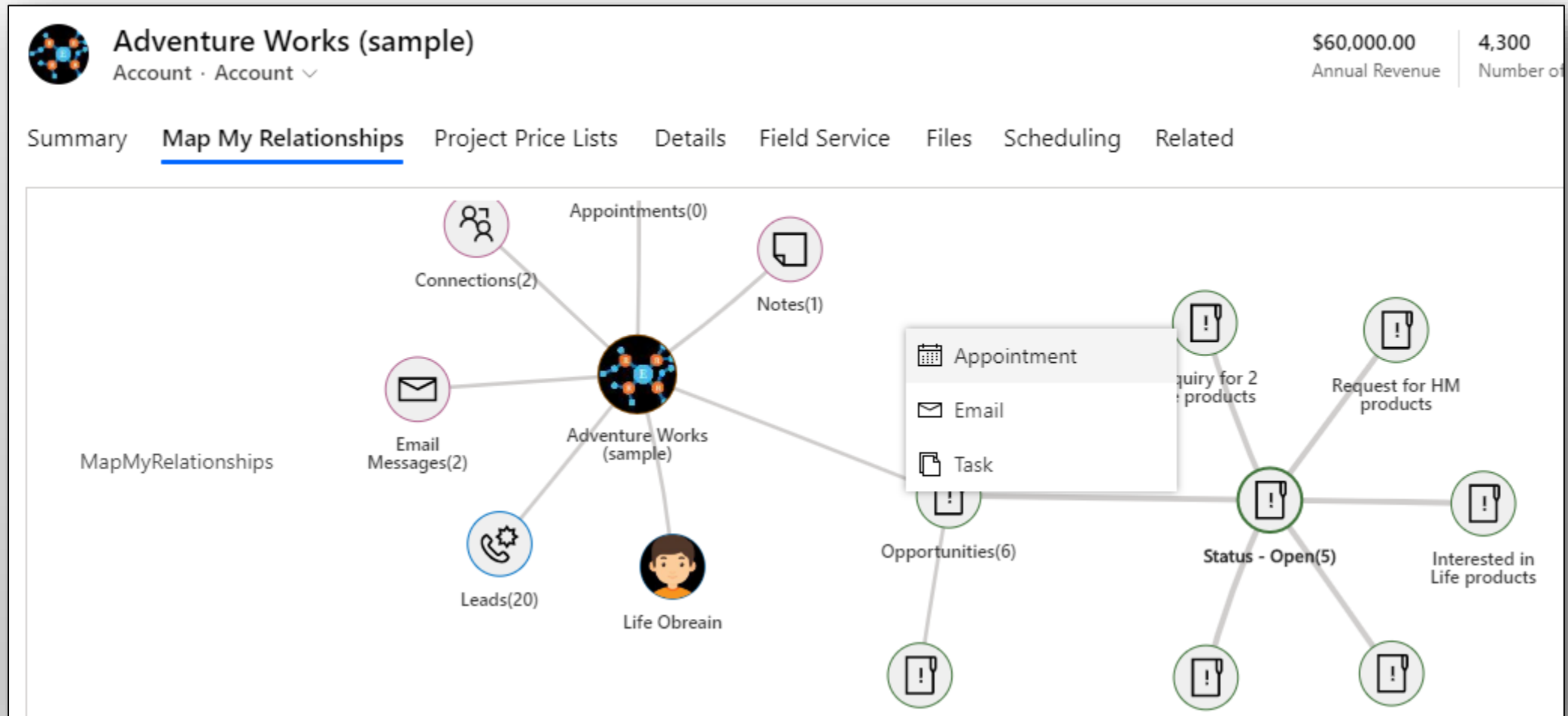
# Map My Relationships Control



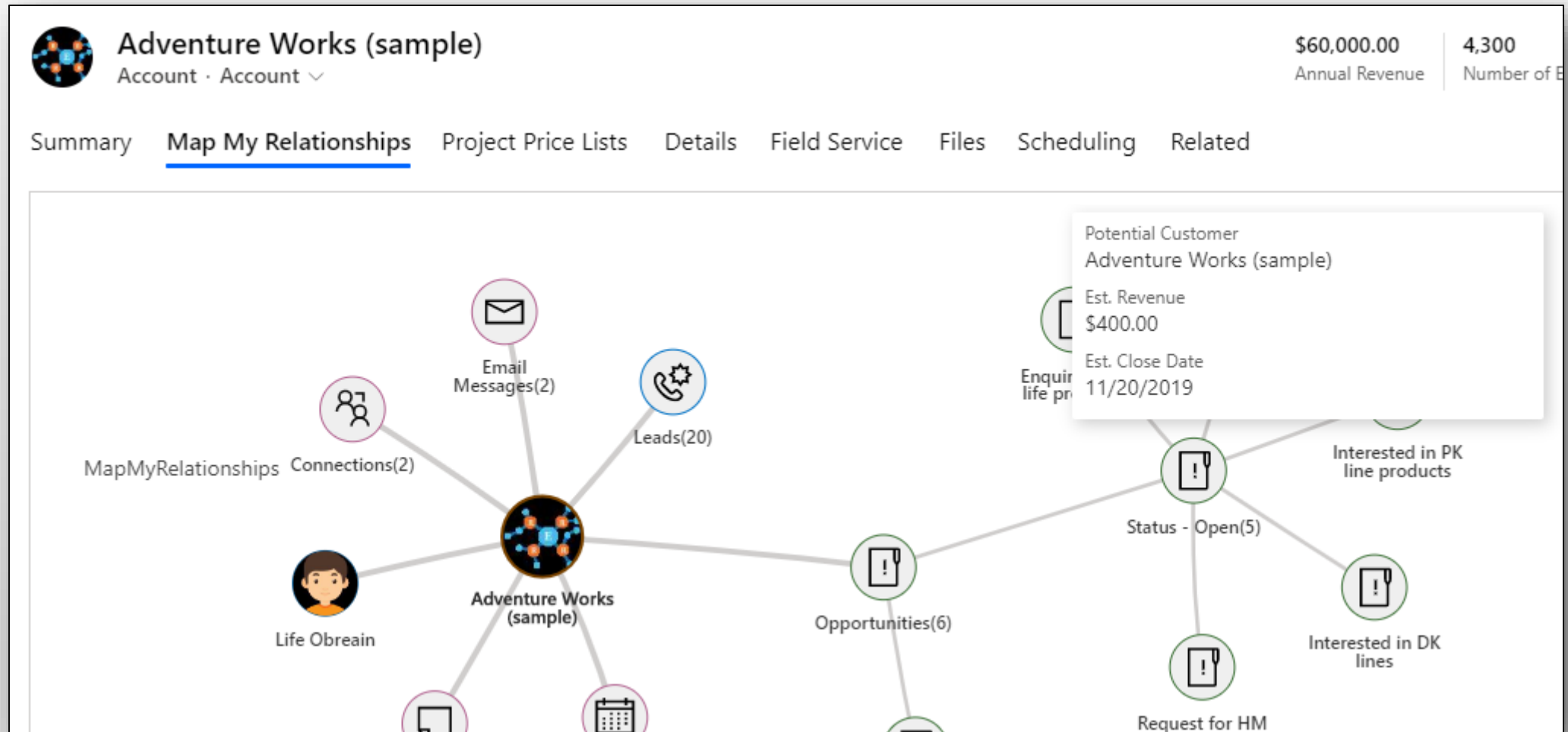
# Display Images to Identify Types of Records



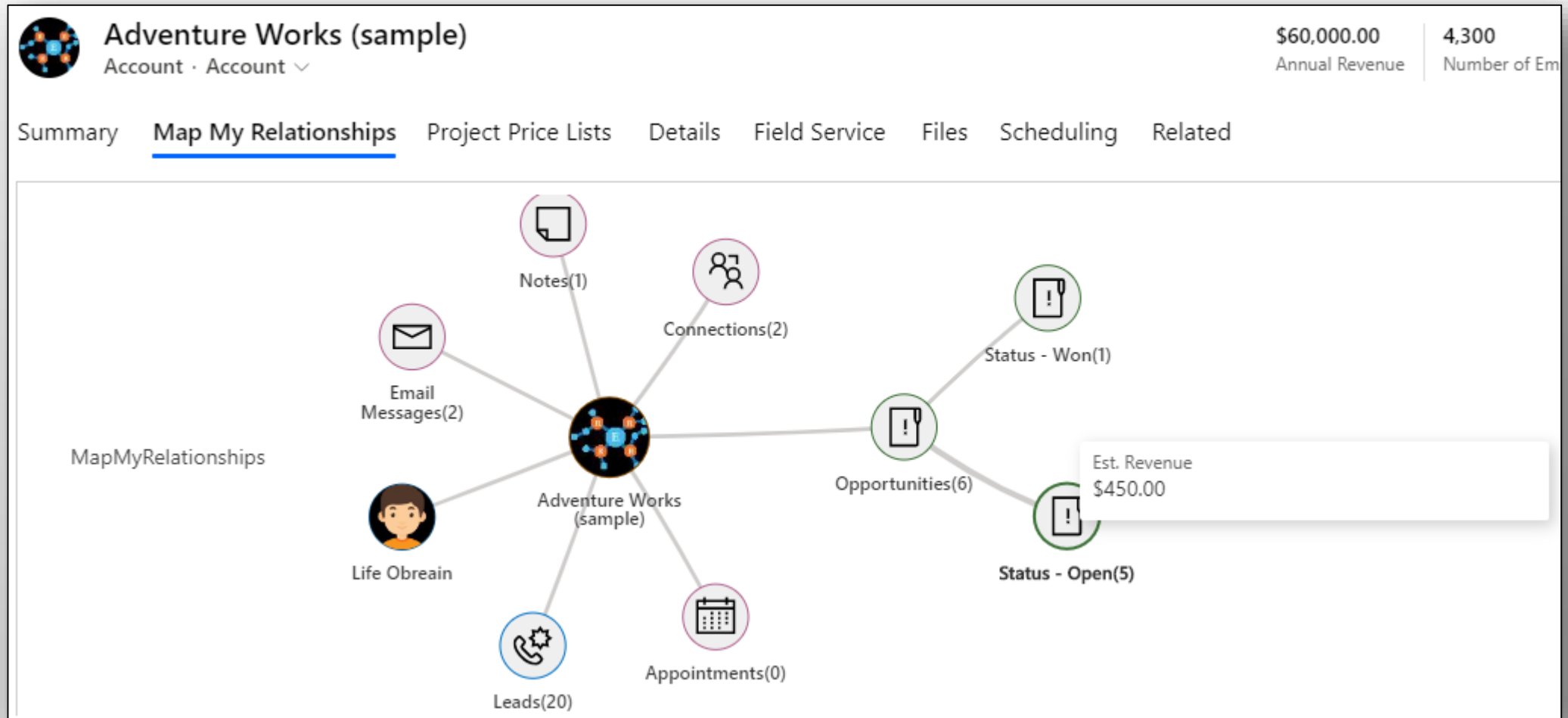
# Perform Quick Actions with a Click



# Hover to View Record Details



# Grouping & Aggregation



# Next Steps

- Learn more about [Map My Relationships](#) today.
- Email: [crm@inogic.com](mailto:crm@inogic.com)

