WaveAccess
We Make IT Easy

Relationship Charts User Guide

Microsoft Dynamics 365 Compatible

About

WaveAccess is a results focused software development company that provides high quality software outsourcing services to hundreds of emerging and established companies globally. We use our technical expertise to increase business efficiencies, optimize slow or unreliable systems, recover projects that have gone off track and bring ambitious ideas to life.

18
years of delivering successful outcomes for customers

300+
talented & passionate professionals in 4 countries

4
global R&D centers and almost any technology

16+
industries from banking to healthcare use our solutions

280+
successful projects delivered and counting

96%
customer satisfaction index

Awards and Recognitions

Silver Microsoft Partner

Microsoft Partner
Microsoft
2018 Partner of the Year
Artificial Intelligence Award
2017 Partner of the Year
Business Analytics Award

Microsoft Partner Network
WORLDWIDE
DYNAMICS PARTNER OF THE YEAR
2009, 2010, 2011 & 2016

SCI-TECH AWARDS
(ACADEMY OF MOTION PICTURE ARTS AND SCIENCES)

CERTIFIED ISO 9001 CERTIFIED

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Introduction

Welcome to Relationship Charts for Microsoft Dynamics CRM – an easy to use, intuitive tool that is designed to transform the way you manage and leverage your relationships using Microsoft Dynamics CRM.

Relationship Charts allows you to build and manage detailed and customizable charts associated with any entity in Microsoft CRM. It works the way Microsoft CRM does, using the same controls and interface, and can be accessed from within any entity (including custom entities).

The purpose of this training guide is to give you easy to follow instructions on how to create and manage relationship charts for any of the above.

What are Relationship Charts?

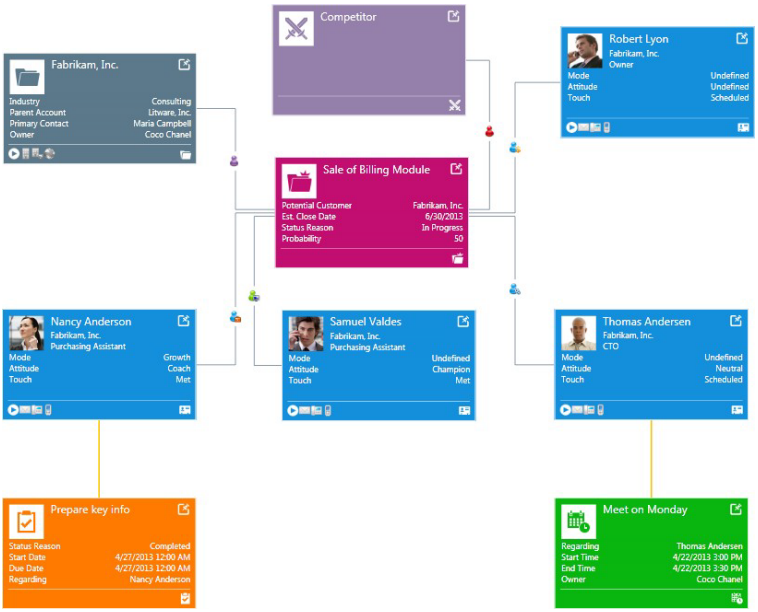
Relationship Charts is a Microsoft Dynamics CRM add-on that brings CRM data to the Chart, where you can see, modify and build relationships and connections and save them back in CRM.

What does Relationship Charts allow CRM users to do?

- See any logical relationships between any entities.
- Build any relationships and connections on the chart by drag and drop.
- Explore relationships in CRM between different entities.
- Navigate EASILY between logically connected CRM entities.
- Create activities directly from the chart.
- Guide users through working on opportunities, projects and other complicated things in accordance with best practices and methodologies applied in your organization.
- Read the latest messages posted by contacts in Twitter.

See any logical relationships between any entities

It allows users to see any logical relationships between any entities (for example cross teams relationships, responsibilities relationships, ownership relationships, projects relationships and so on).

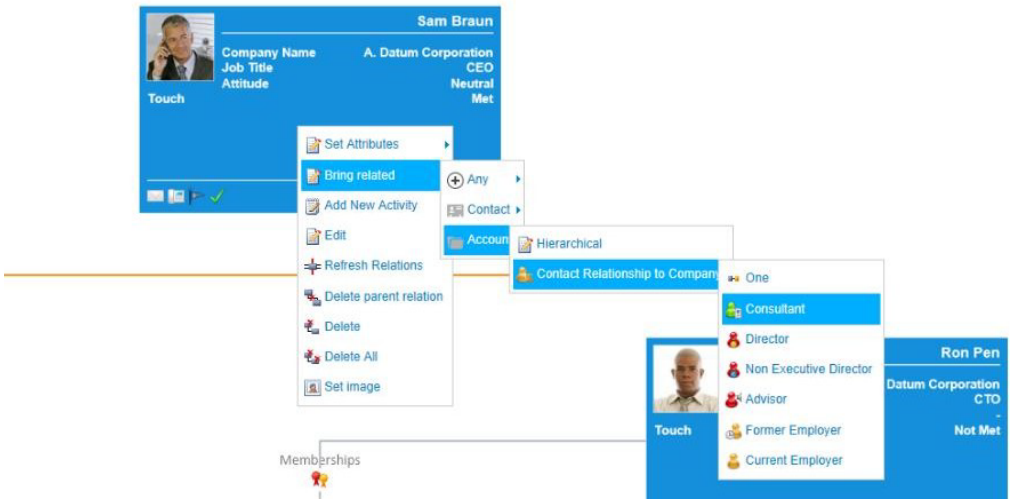


Build any relationships and connections on the chart by drag and drop

Relationship Charts allows users to build any relationships (and connections) on the chart by dragging an actor and dropping it on another actor that should be connected.

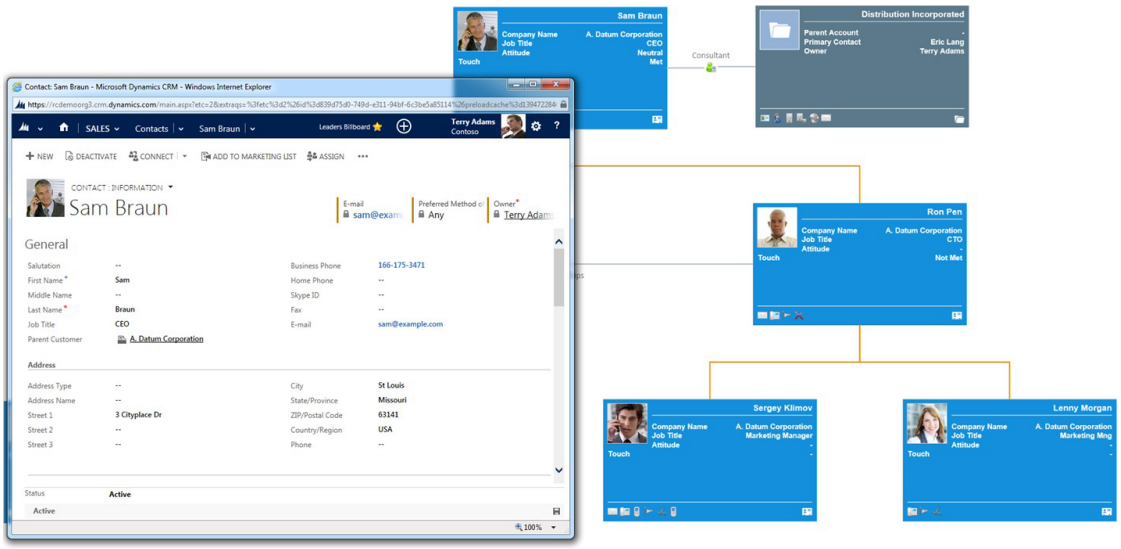
Explore relationships in CRM between different entities

Relationship Charts allows users to explore relationships. Working with a chart you can click at the actor and using the context menu you can bring related entities to the chart – for example, for a contact you can bring his former colleagues to the chart, for a deal you can bring the broker who worked on it, for a project you can bring all project members and so on. And you can start from one contact and then gradually explore how this contact is related to everything else – projects, opportunities, other people and so on.



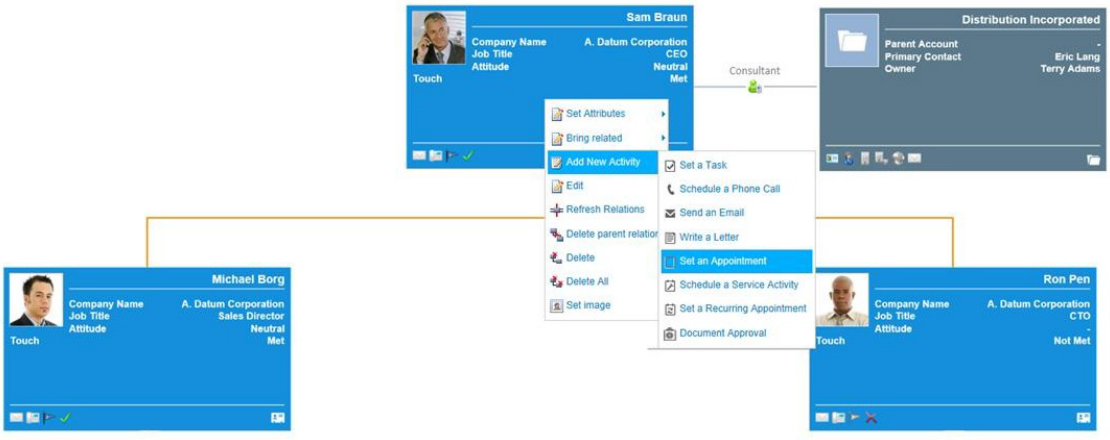
Navigate EASILY between logically connected CRM entities

It allows users to EASILY navigate in CRM. Relationship Charts provides an alternative logical way to navigate between different CRM entities placed on the same chart or on linked charts. Again here there is an idea that you have a subset of data and they are logically related to each other and you can easily navigate from one of them to another one - just by double click on an actor on a chart.



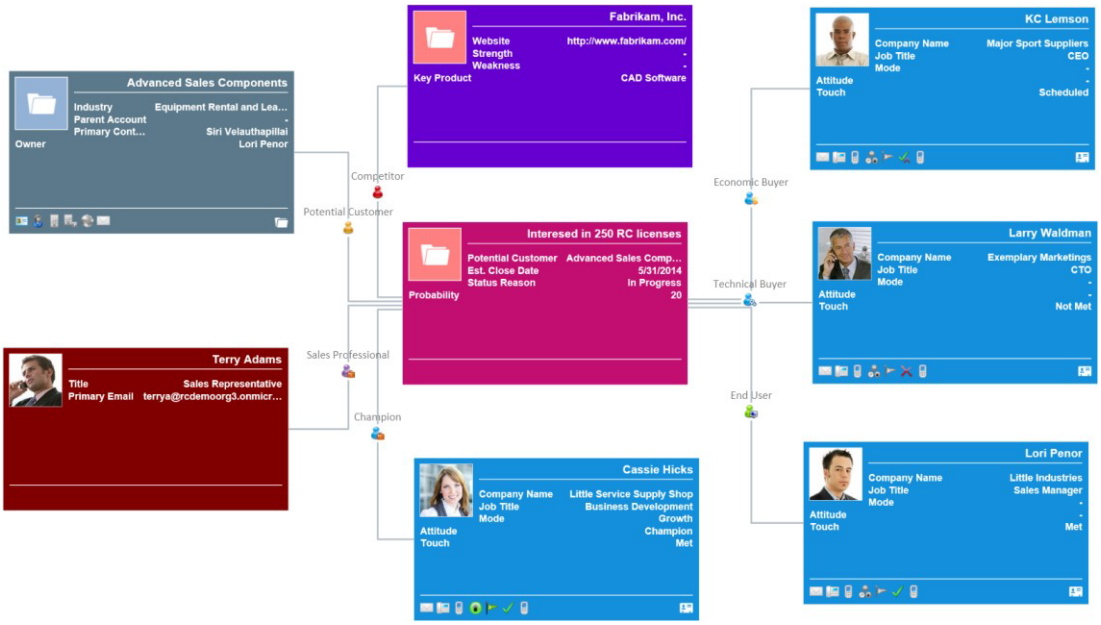
Create activities directly from the chart

Relationship Charts allows users to create activities directly from the chart. The key idea is that Relationship Charts allows people to really “work” with data without “leaving” the chart. You are looking at a contact and you want to schedule a call – you can do it right here with one mouse click.



Guide users through working on opportunities, projects and other complicated things in accordance with best practices and methodologies applied in your organization

Relationship Charts can be used as a guidance tool. The special “business” templates containing ghosts and hints associated with ghosts can guide the users through working on opportunities, projects and so on. They will provide visual indicators of what information is missed and what needs to be done now. This functionality helps companies re-implement their best practices in the visual way.



Relationship Charts types

Each type of chart has its own value in helping you visualize, manage and leverage our relationships with customers, partners and suppliers, as recorded in Microsoft Dynamics CRM.

It is possible to have many different charts against an individual CRM entity. So, for example, you could create separate Organization Charts for the marketing department, finance department or different geographic regions of an Account.

Below you can find some examples of how Relationship Charts can be used for different entities. Remember however that they can also be built for custom entities, and be configured to your industry to be vertical specific.

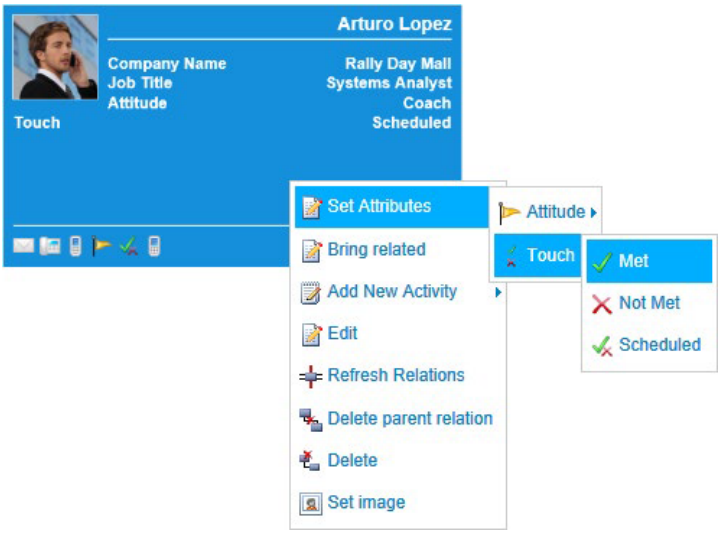
Account Charts

Account Charts allow you to create a diagram of the hierarchy of the organization, and then capture valuable information about the Contacts and the relationships between them. These Contacts are displayed in Relationship Charts as a box, called an **Actor**.

Information relevant to an Actor is displayed as either text or icons within the box. These are called **Attributes**. The Attributes are already defined by your organization, enabling you to choose from a variety of different labels that give your chart real meaning. For example, these might describe their:

- Company Name
- Job title
- Current attitude to your organization.
- Current status of being contacted or not.

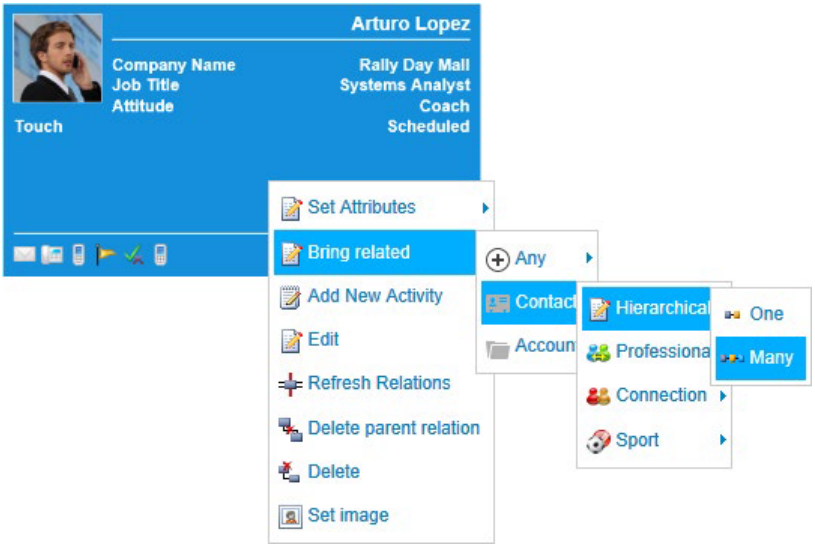
You can update Contact's Attributes, as you find out more information about the individual over time. Using your mouse, right click the Actor box and select the attribute from the drop down list.



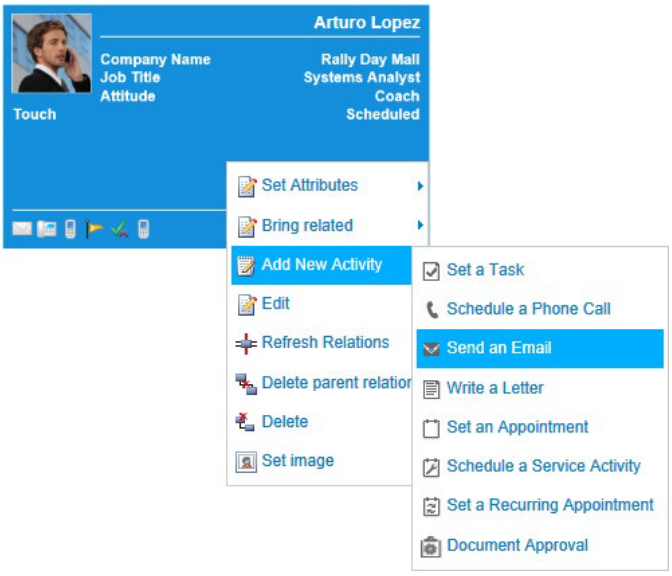
Please be aware that if the attribute is set from a Relationship Chart, then it will only apply on the actor for the specific chart in use. However, if the attribute is tied to the CRM database, then it will appear on multiple charts.

You can also double click the Actor box to open the Microsoft CRM form, and then further update the relevant entity. Any relevant changes you make will be automatically updated in the relationship chart you are working on. This applies to all charts.

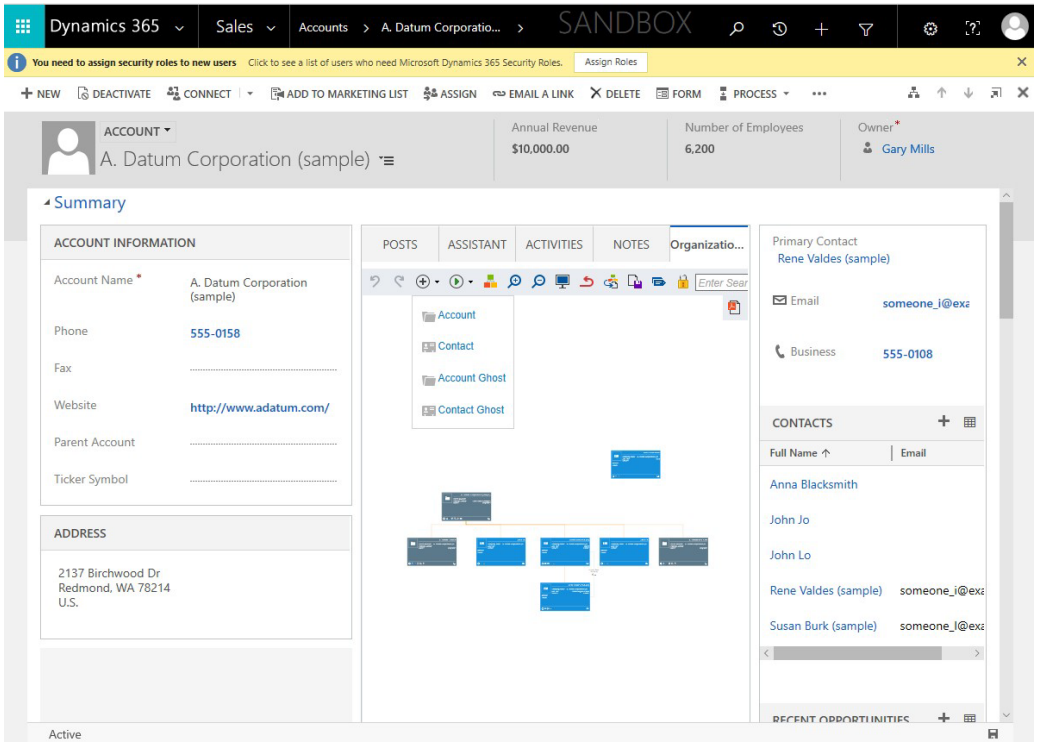
In Relationship Charts you can display any (or all) of the Contacts within an Account on a chart. You can also display Contacts that are not employees of the Account, and show how they relate to people within the Account. Additionally, other Accounts can be displayed on the chart, as an Actor, along with their relationships too.

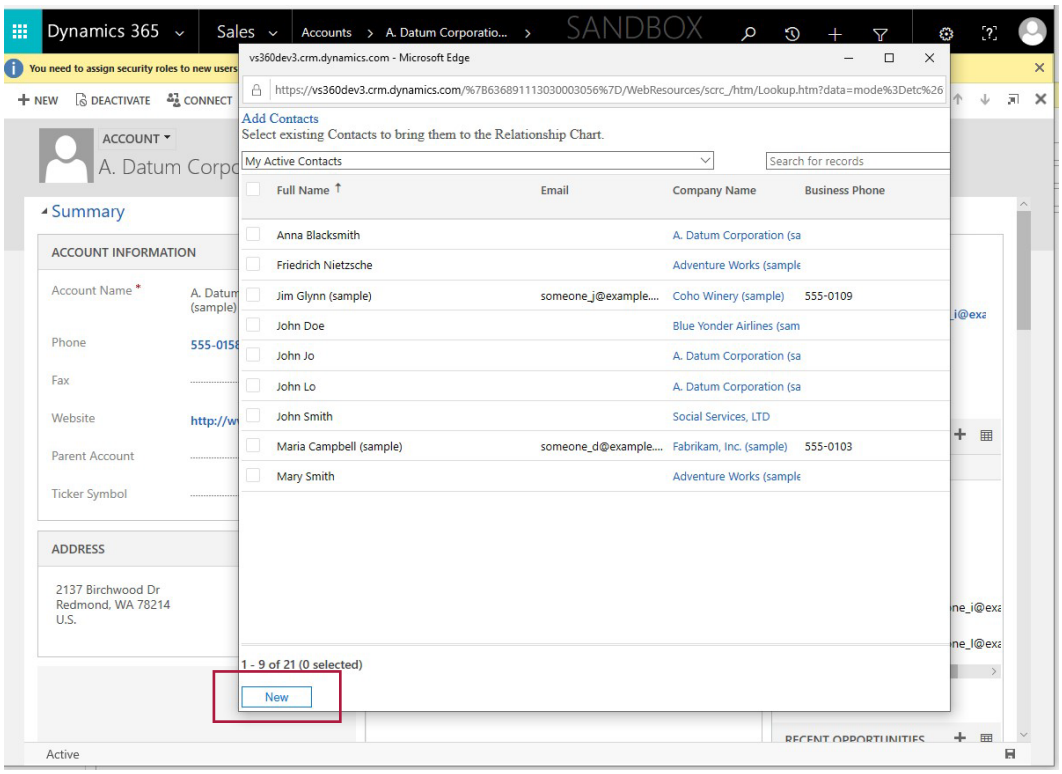


You can also add new activities directly from Relationship Chart.



The Contacts don't necessarily need to have been pre-created within Microsoft CRM; you can create new ones directly within Relationship Charts. You can also update or edit any Actor without having to leave Relationship Charts.


Dynamics 365
Sales
Accounts
A. Datum Corporatio...
SANDBOX
You need to assign security roles to new users
Click to see a list of users who need Microsoft Dynamics 365 Security Roles.
Assign Roles
NEW
DEACTIVATE
CONNECT
ADD TO MARKETING LIST
ASSIGN
EMAIL A LINK
DELETE
FORM
PROCESS
ACCOUNT
A. Datum Corporation (sample)
Annual Revenue
$10,000.00
Number of Employees
6,200
Owner
Gary Mills
Summary
ACCOUNT INFORMATION
Account Name
A. Datum Corporation (sample)
Phone
555-0158
Fax
Website
http://www.adatum.com/
Parent Account
Ticker Symbol
ADDRESS
2137 Birchwood Dr
Redmond, WA 78214
U.S.
POSTS
ASSISTANT
ACTIVITIES
NOTES
Organizatio...
Account
Contact
Account Ghost
Contact Ghost
Primary Contact
Rene Valdes (sample)
Email
someone_i@exa
Business
555-0108
CONTACTS
Full Name
Email
Anna Blacksmith
John Jo
John Lo
Rene Valdes (sample)
someone_i@exa
Susan Burk (sample)
someone_l@exa
Active


Dynamics 365
Sales
Accounts
A. Datum Corporatio...
SANDBOX
vs360dev3.crm.dynamics.com - Microsoft Edge
https://vs360dev3.crm.dynamics.com/%7B636891113030003056%7D/WebResources/scrc_/htm/Lookup.htm?data=mode%3Detc%26
Add Contacts
Select existing Contacts to bring them to the Relationship Chart.
My Active Contacts
Search for records
Full Name
Email
Company Name
Business Phone
Anna Blacksmith
A. Datum Corporation (sa
Friedrich Nietzsche
Adventure Works (sample
Jim Glynn (sample)
someone_j@example....
Coho Winery (sample)
555-0109
John Doe
Blue Yonder Airlines (sam
John Jo
A. Datum Corporation (sa
John Lo
A. Datum Corporation (sa
John Smith
Social Services, LTD
Maria Campbell (sample)
someone_d@example....
Fabrikam, Inc. (sample)
555-0103
Mary Smith
Adventure Works (sample
1 - 9 of 21 (0 selected)
New
Summary
ACCOUNT INFORMATION
ADDRESS
2137 Birchwood Dr
Redmond, WA 78214
U.S.
Active

In this way, Relationship Charts enables you to see all people and companies that have relationships with a particular Account and, then, plan how you want to manage your customer, partner or supplier.

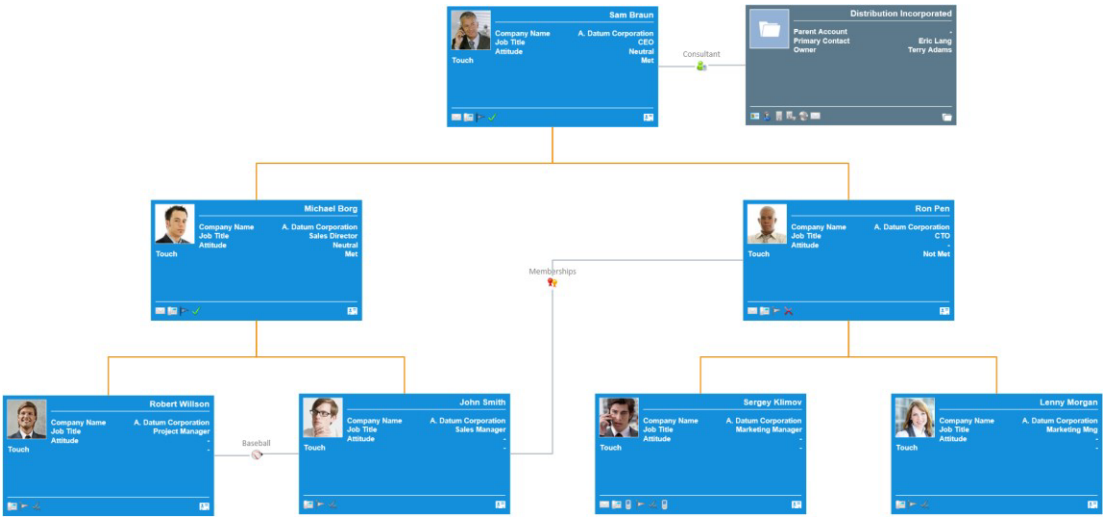


Fig. 1 Account Chart with an external legal services company.

Another way to use Relationship Charts for an Account entity is to view the business potential from that account over a given period of time. It is possible to display all open Opportunities relating to the account, any accounts who are the known competitors for those opportunities; and the internal users who have a relationship with a key individual in the organisation. See below as an example.

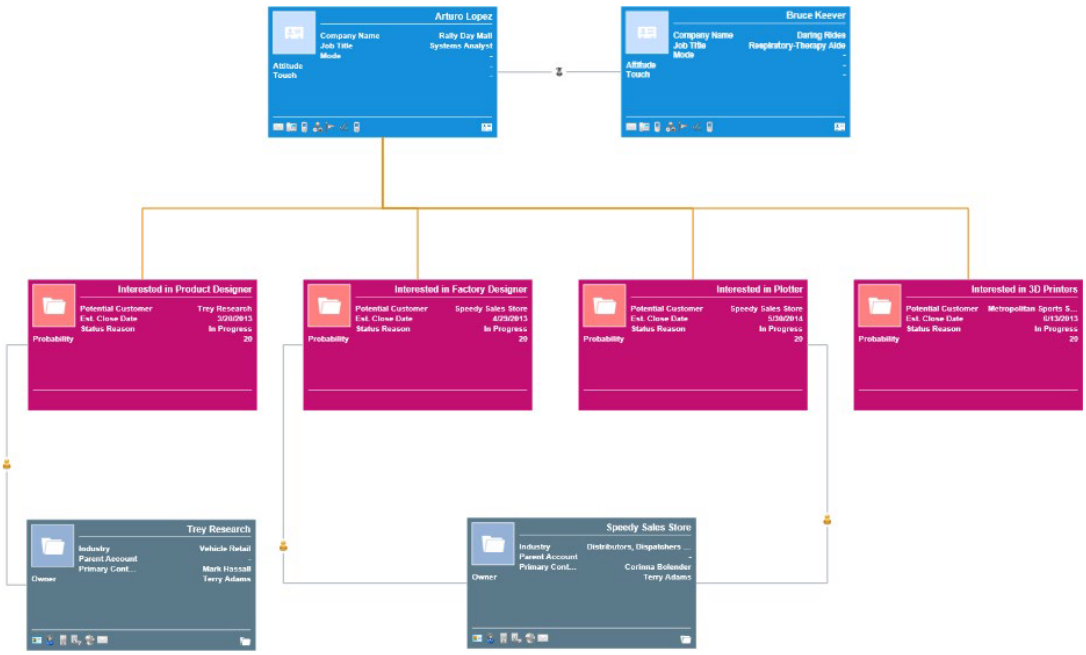


Fig. 2 Account Chart showing open opportunities & competition.

Yet another use for Account Charts is to build a graphical view of the hierarchy of a large Enterprise with sub-divisions, as illustrated below:

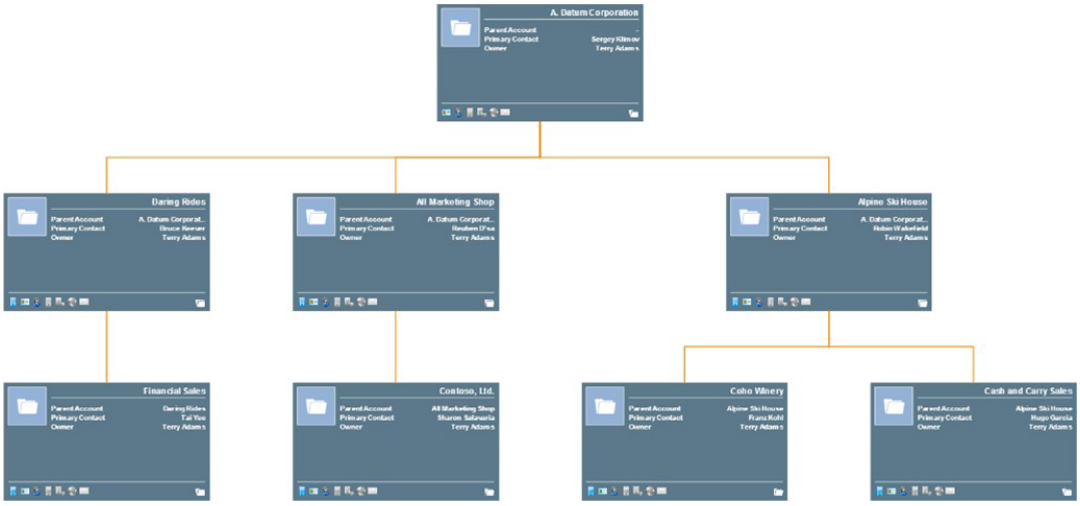


Fig. 3 Account Chart showing sub-divisions of a large Enterprise account.

Opportunity Charts

Opportunity Charts are created and updated in the same way as Account Charts, although the Attributes set by your organization may be different. Opportunity Charts help you visualize and manage relationships in the context of an individual sales opportunity. You can have as many Opportunity Charts associated with an individual sales opportunity as you require. For example, you may want to show the political landscape in one, and who your competitors have relationships with in another. Again, the Attributes can be set at an individual Contact level, showing each individual's influence on an opportunity.

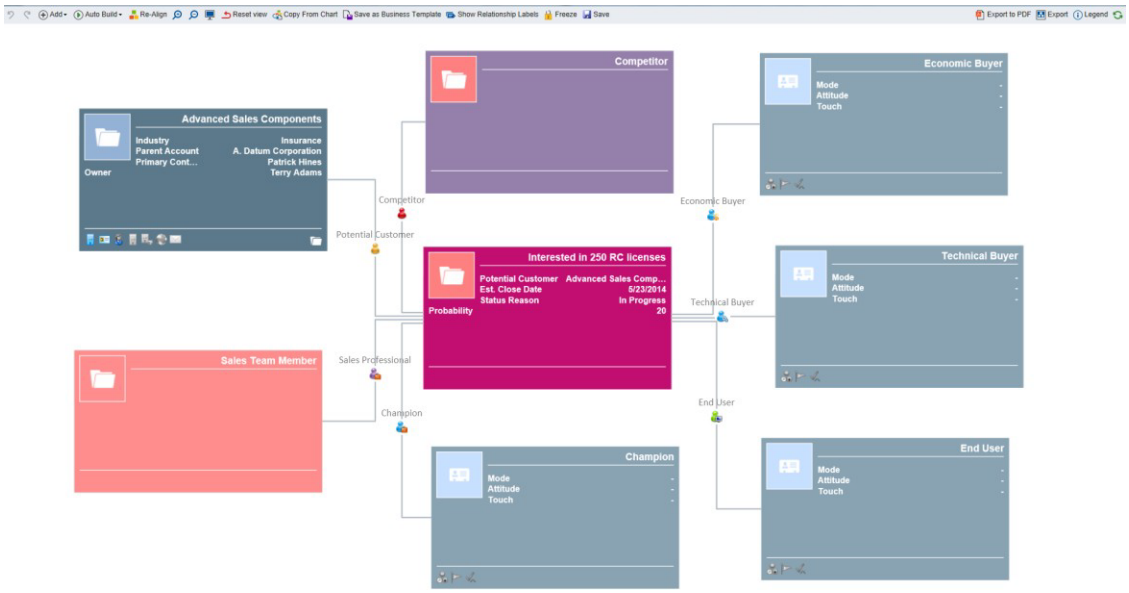


Fig. 4 Opportunity Chart with a Ghost Actors.

A key feature of Relationship Charts is the ability to also display **'Ghost'** Actors on a chart. These are people or companies who you know have a role to play within the opportunity, but for whom you have not yet gathered sufficient information to create a record within the CRM system itself.

Contact Charts

The Contact Chart gives you a clear view of 'who knows whom', and an easy way of identifying a network of relationships.

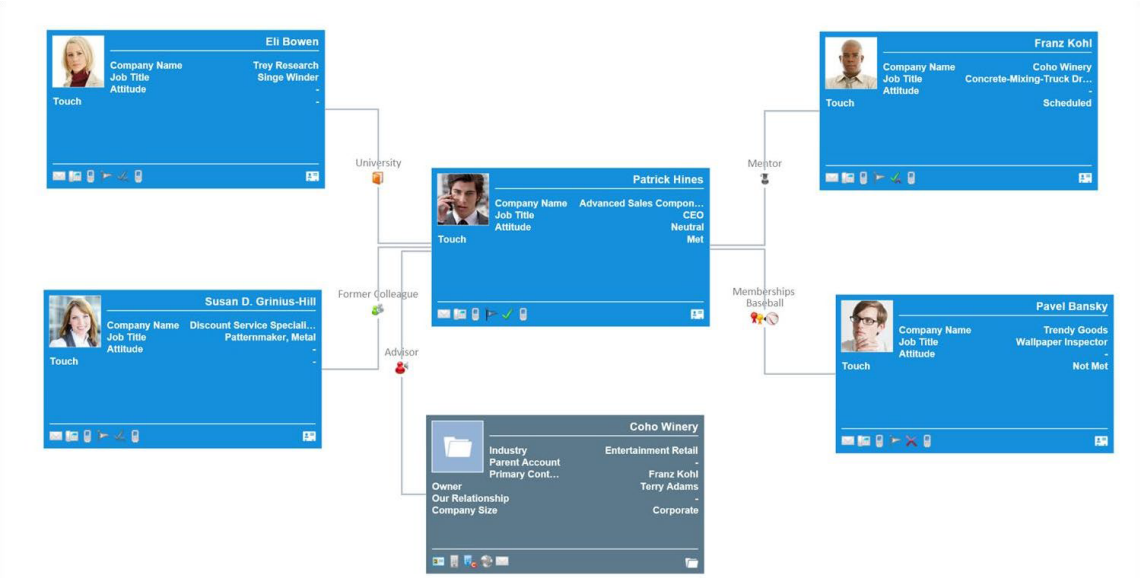


Fig. 5 Contact Chart showing non-hierarchical relationships.

You can display both Accounts and Contacts (and Ghost Accounts and Contacts) on the chart, as well as any other entity such as a project or opportunity that may be related to an individual contact.

In this way, you can show the non-hierarchical relationships between people and companies. For example, show whether they have common interests such as sport, professional or advisory relationships, or whether a Contact has Non-Executive roles in other companies.

Project Charts

Using the example of a custom entity, a chart can be created for a project – to show the Account for which the Project is being delivered, the internal resources assigned to the project, and an opportunity that has been identified as a result.

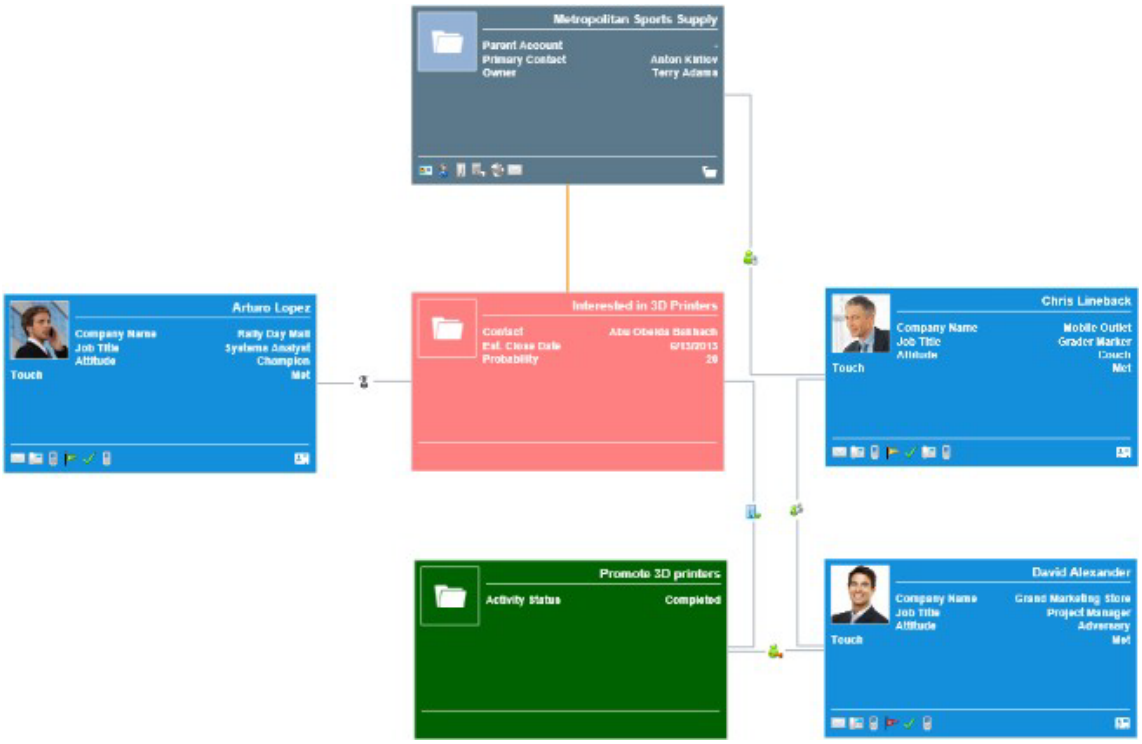


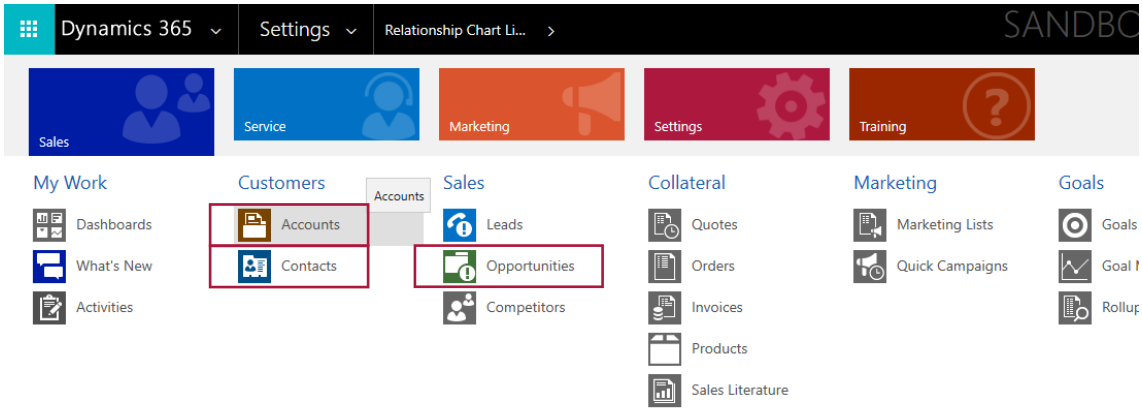
Fig. 6 Project chart showing implementation resources & associated opportunity.

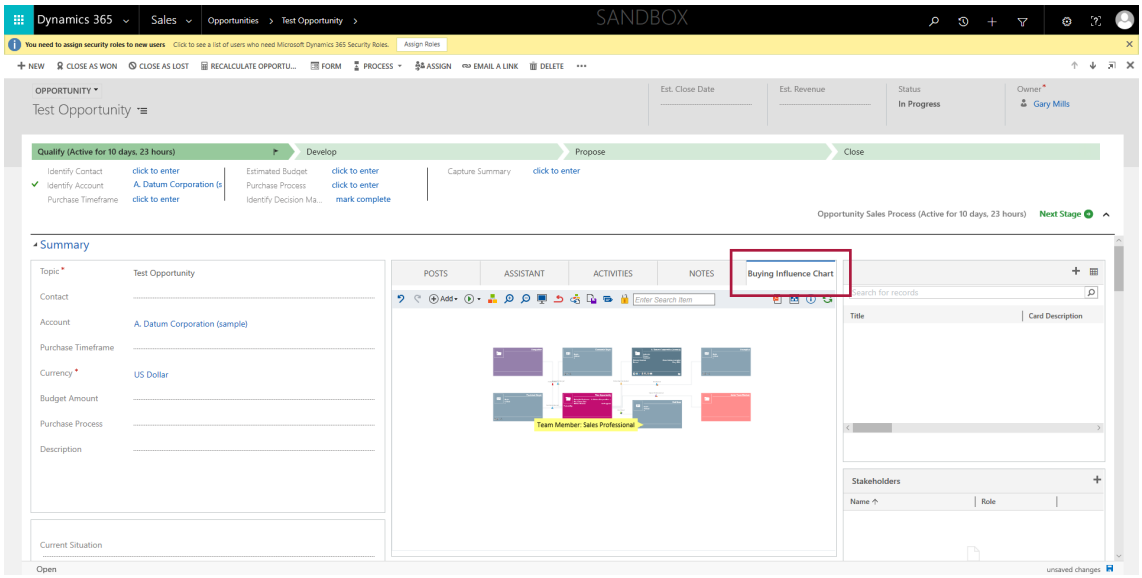
How do I access Relationship Charts?

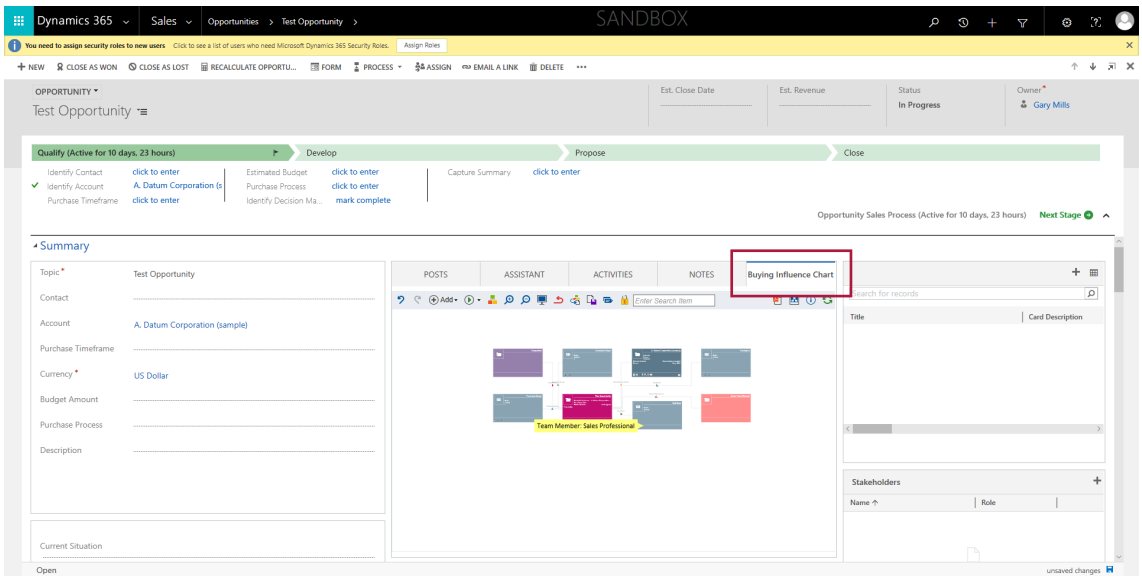
Relationship Charts can be accessed from any entity in CRM.

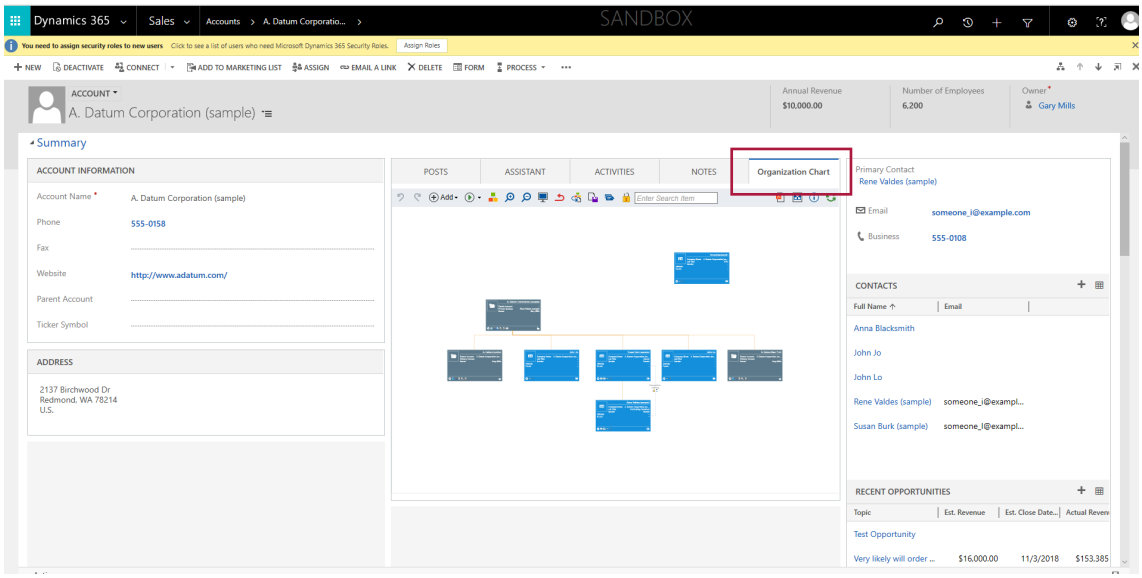
The easiest way to see Opportunity Chart – go to Sales ->Opportunities

To see Contact or Account charts – go to Contacts and Accounts in Sales -> Customer Menu.





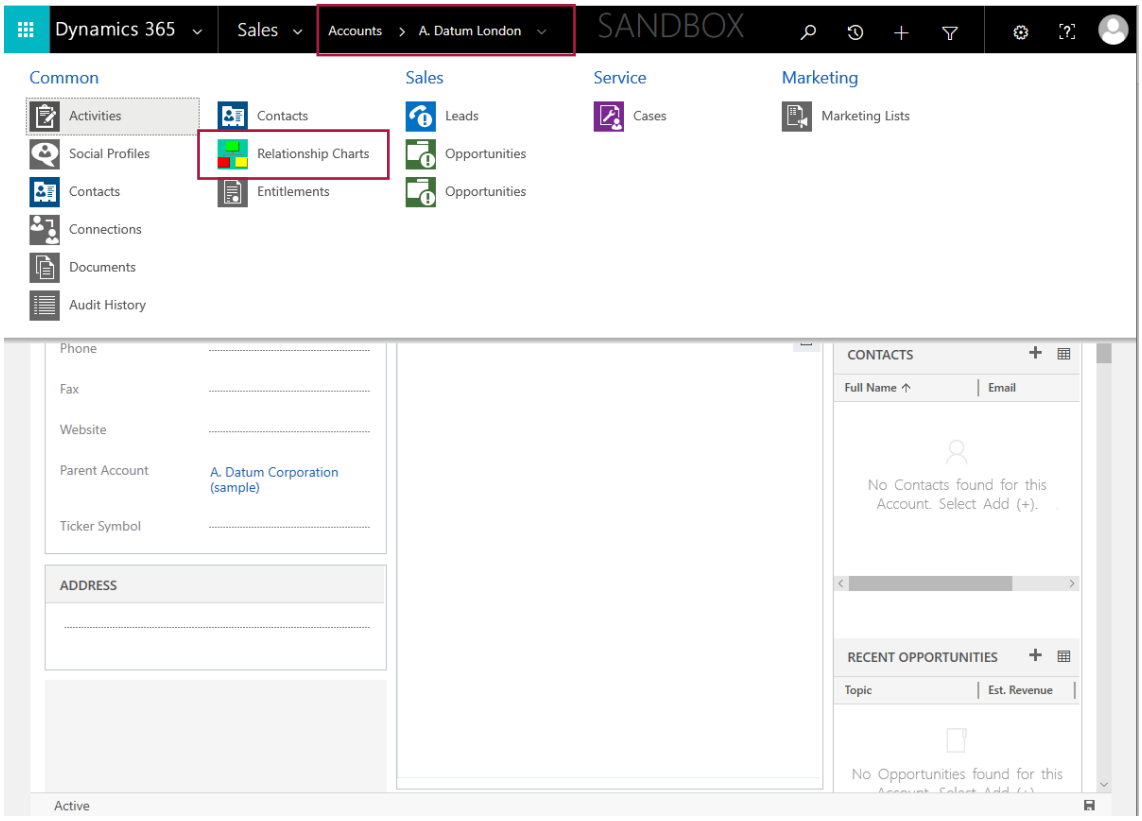

Dynamics 365
Sales
Opportunities
Test Opportunity
SANDBOX
Test Opportunity
Qualify (Active for 10 days, 23 hours)
Develop
Propose
Close
Summary
Topic
Test Opportunity
Contact
Account
A. Datum Corporation (sample)
Purchase Timeframe
Currency
US Dollar
Budget Amount
Purchase Process
Description
POSTS
ASSISTANT
ACTIVITIES
NOTES
Buying Influence Chart
Team Member: Sales Professional
Stakeholders
Current Situation
Open

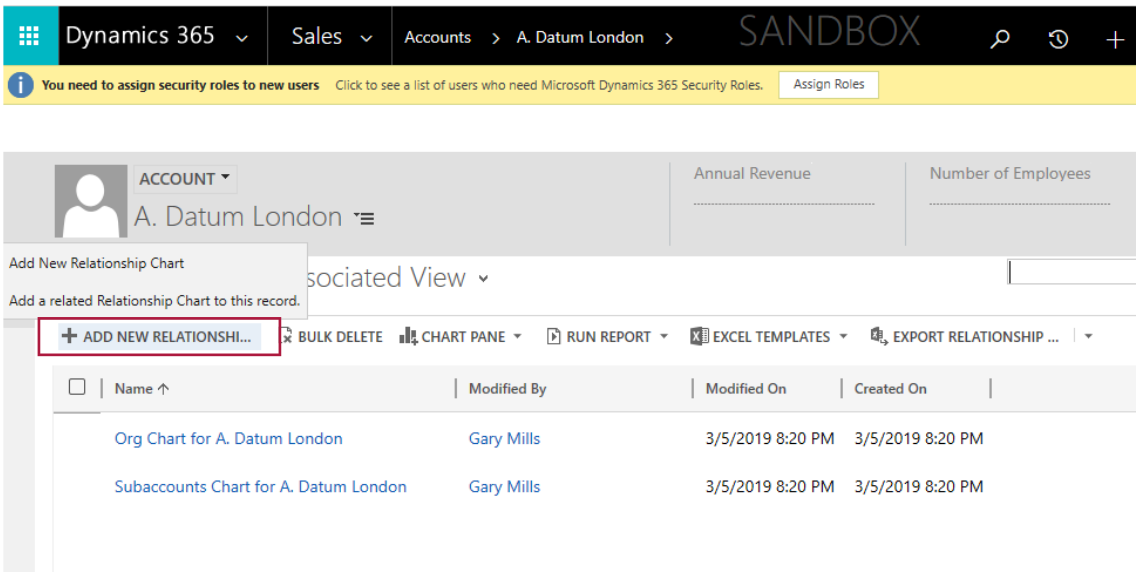

Dynamics 365
Sales
Accounts
A. Datum Corporatio...
SANDBOX
ACCOUNT
A. Datum Corporation (sample)
Annual Revenue
$10,000.00
Number of Employees
6,200
Summary
ACCOUNT INFORMATION
Account Name
A. Datum Corporation (sample)
Phone
555-0158
Fax
Website
http://www.adatum.com/
Parent Account
Ticker Symbol
ADDRESS
2137 Birchwood Dr
Redmond, WA 78214
U.S.
POSTS
ASSISTANT
ACTIVITIES
NOTES
Organization Chart
Primary Contact
Rene Valdes (sample)
someone_i@example.com
555-0108
CONTACTS
Anna Blacksmith
John Jo
John Lo
Rene Valdes (sample)
Susan Burk (sample)
RECENT OPPORTUNITIES
Test Opportunity
Very likely will order ...
$16,000.00
11/3/2018
$153,385

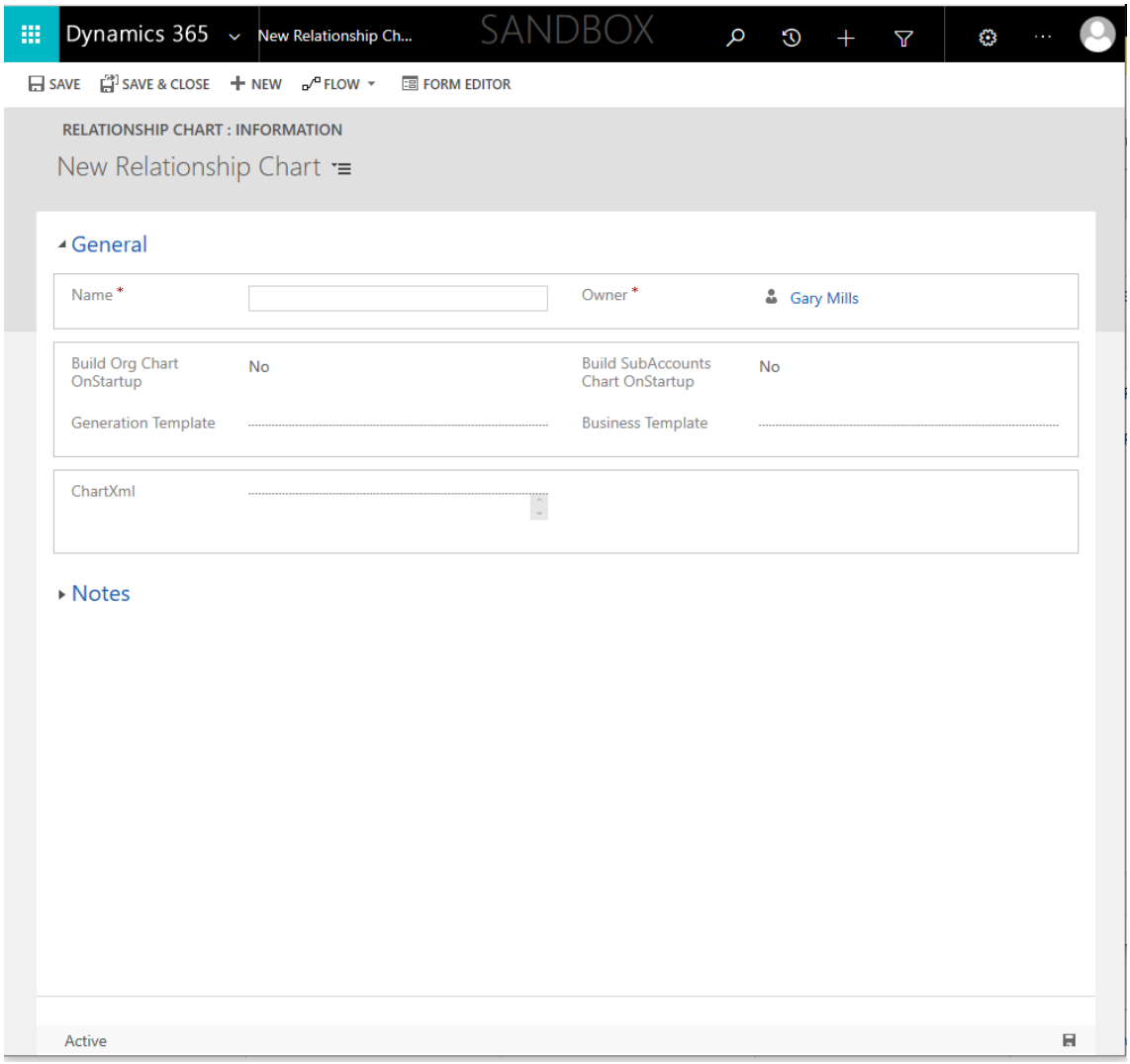
Creating a Relationship Chart

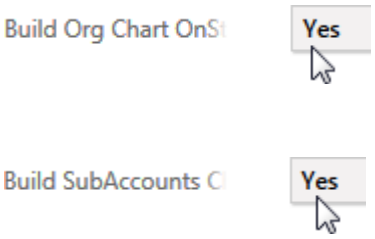
Relationship Charts can be created from within any entity.

To create a new Chart, click the **Add New Relationship Chart** button.



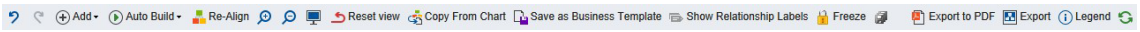



Dynamics 365
New Relationship Ch...
SANDBOX
SAVE
SAVE & CLOSE
NEW
FLOW
FORM EDITOR
RELATIONSHIP CHART : INFORMATION
New Relationship Chart
General
Name *
Owner *
Gary Mills
Build Org Chart OnStartup
No
Build SubAccounts Chart OnStartup
No
Generation Template
Business Template
ChartXml
Notes
Active

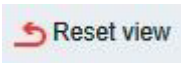
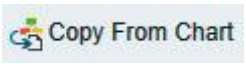
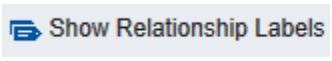
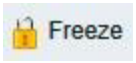
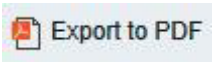

Build Org Chart OnSt
Yes
Build SubAccounts C
Yes

See any logical relationships between any entities

The Relationship Charts screen has its own tool bar to help you create and update your charts. The white area is called the canvas, which will display the chart itself. You can also add Notes to each chart, as with all Microsoft CRM screens.
The table below explains the function of each button on the toolbar.



Button	Title	Drop Down List	Action
	Undo		Reverses the last performed action
	Redo		If undo is used, will restore the last performed action
Add	Add		Add an Actor
Contact		Contact	Add a new Contact
Account		Account	Add a new Account
Contact Ghost		Contact Ghost	Add Contact Ghost
Account Ghost		Account Ghost	Add Account Ghost
Auto Build	Auto build		
Org Chart		Org Chart	Builds organization structure for the current account
Sub Accounts		Sub Accounts	Builds a tree of accounts with a hierarchical relation
Run Custom ...		Run Custom...	Generates custom charts automatically using XML files
Re-Align	Re-Align		Realigns all Actors in the chart

Button	Title	Drop Down List	Action
	Zoom in/ Zoom out		Zoom in/Zoom out the chart
	Full Screen		See Chart in a Full Screen Mode
	Reset		Reverts Relationship Chart back to its original state
	Copy From Chart		Copy from the selected chart
	Save as Business Template		Allows saving templates that can be exported afterwards together with Relationship Charts configuration.
	Show Relationship labels		Shows labels of non-hierarchical relationships
	Freeze		Switches on the read- only mode of chart; displaying only, no changes
	Autosave		Enables autosaving of all changes on your chart
	Export to PDF		Exports your chart to PDF file
	Export		Allows you to export your Relationship Chart as a Picture
	Legend		List of Icons and their meanings
	Refresh		Refresh the chart

Building a Relationship Chart

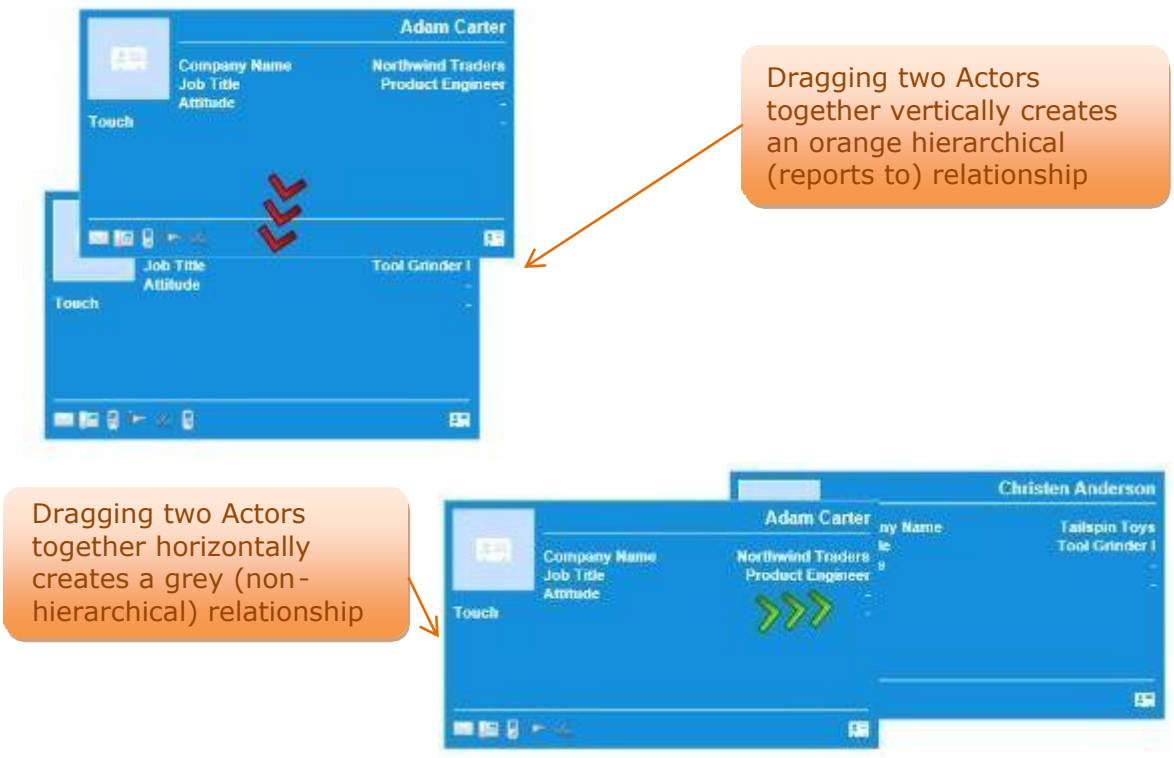
The easiest way to create a new chart is to use the Org Chart button. Having created a new chart using the Org Chart button, this section shows you how to manually add Actors and their relationships, as well as set Attributes.

Adding Relationships

You can create hierarchical relationships (signified by orange lines) dragging two Actors together vertically. These represent the 'reports to' relationships.

You can also add other types of relationships between Actors (signified by grey lines), which have been defined in the Relationship Charts settings of Microsoft CRM.

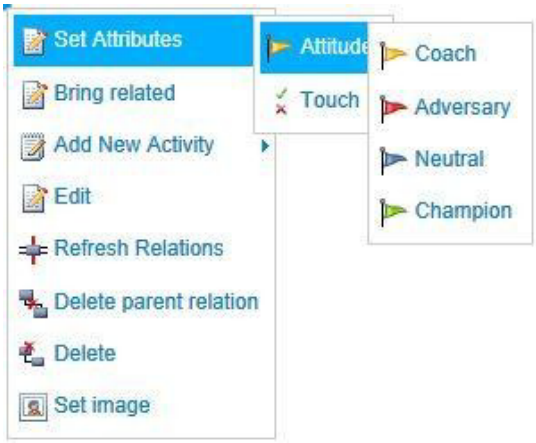
You can relate two Actors together by simply dragging them together:



Once you have all your relationships set in place, you can start setting Attributes both for the Actors on your chart, and for the relationships between them.

Setting Attributes

Setting Attributes is simple in Relationship Charts. To set the Attribute for any Actor displayed on the chart, simply right-click to display the sub-menu.

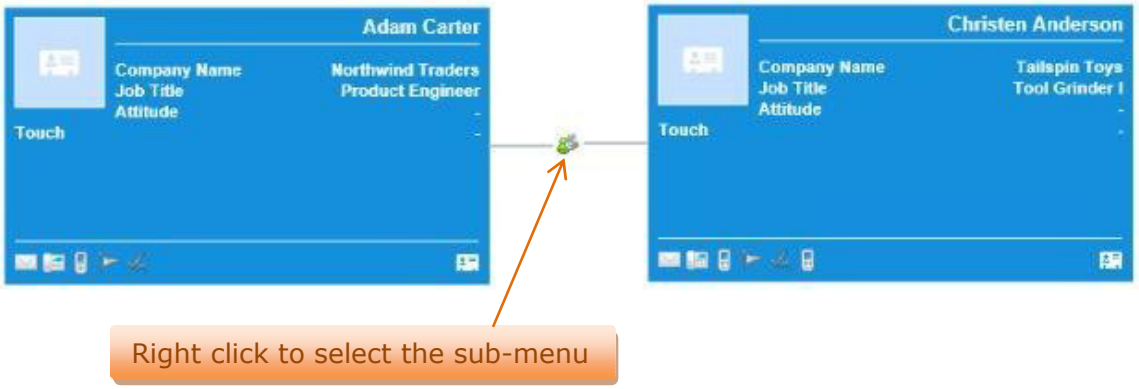


From the **Set Attributes** option of the sub-menu, you can set any Attribute of your Actor in one click. Changing the Attributes value will cause the icons and/or text of the Actor to change in appearance.

As well as setting Attributes for Actors on your Relationship Chart, you can set Attributes for the relationships between them.

First you must create the relationship between them, which you did in the last section. When the relationship is created, any default Attributes that are set in the Relationship Charts settings area of Microsoft CRM will appear.

To set these Attributes, or to add new Attributes to the relationship, right-click on the node.



From the sub-menu, you can set the value of relationships by choosing the **Set Relations** sub-option.

Once you've changed this relationship attribute, you can add new Attributes by clicking **Add Relations** in the sub-menu. You can also delete any set Attributes by clicking the **Delete Relations** option in the sub-menu.

Once all Attributes in the relationship have been deleted, the line that links the two Actors is removed.

Any changes that you have made to a relationship chart will be saved automatically if you set up Autosave option. Otherwise, you may save them manually by clicking Save button from the bottom right corner.

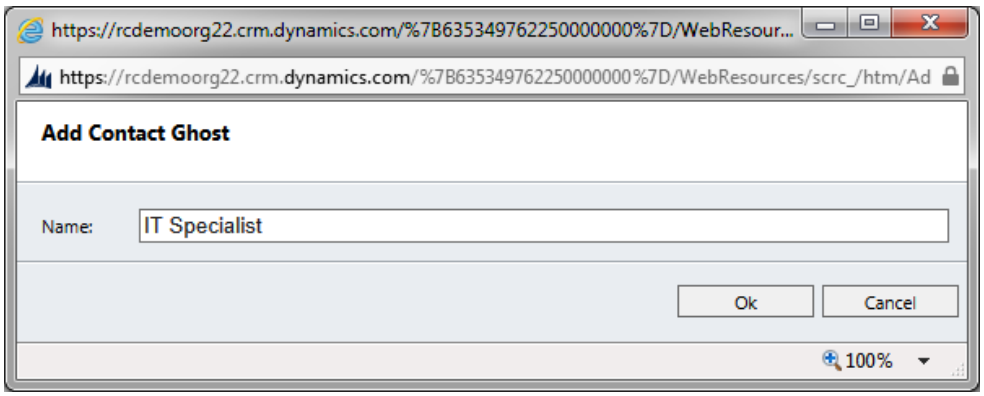
Adding Extra Actors

Once you have worked on your initial Relationship Chart, you may wish to add extra Actors. You can do this using the 'Add' menu in the Relationship Charts toolbar.

The 'Add' menu in the Relationship Charts toolbar allows you to add 'Ghost' Actors. They look and feel the same as regular Relationship Charts Actors, however they do not relate to records that currently exist within Microsoft CRM.

The ability to add Ghost Accounts and Contacts is useful if you need to add a particular Actor to the Relationship Chart that you would not otherwise include as a record in your Microsoft CRM system. These are useful as placeholders on a chart as you find out more information before creating them as records in CRM.

You can add Ghost Actors from the Add menu. In the example below, we are adding a Contact Ghost called IT Specialist. Fill in the Attitude Field and the Touch Field to set Attributes in the Contact Ghost.

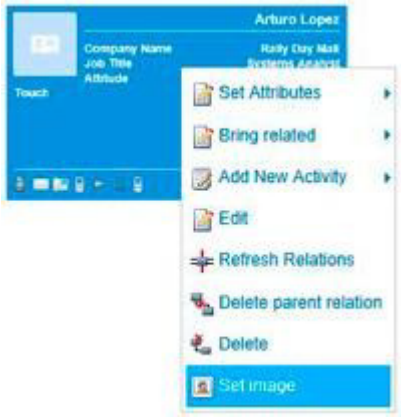


You will be able to work with a Ghost actor in an almost identical manner to the way you work with regular actors.

You can link a ghost Actor to a regular Microsoft CRM Contact or Account by right-clicking on the Actor and selecting **Set [Entity Name]**; the new Actor will maintain all relationship chart Attributes that were set on the ghost Actor.

Set Image

You can also set Image associated with an Actor within the Chart. To do this, right click on the Actor and select **Set Image** in the context menu.

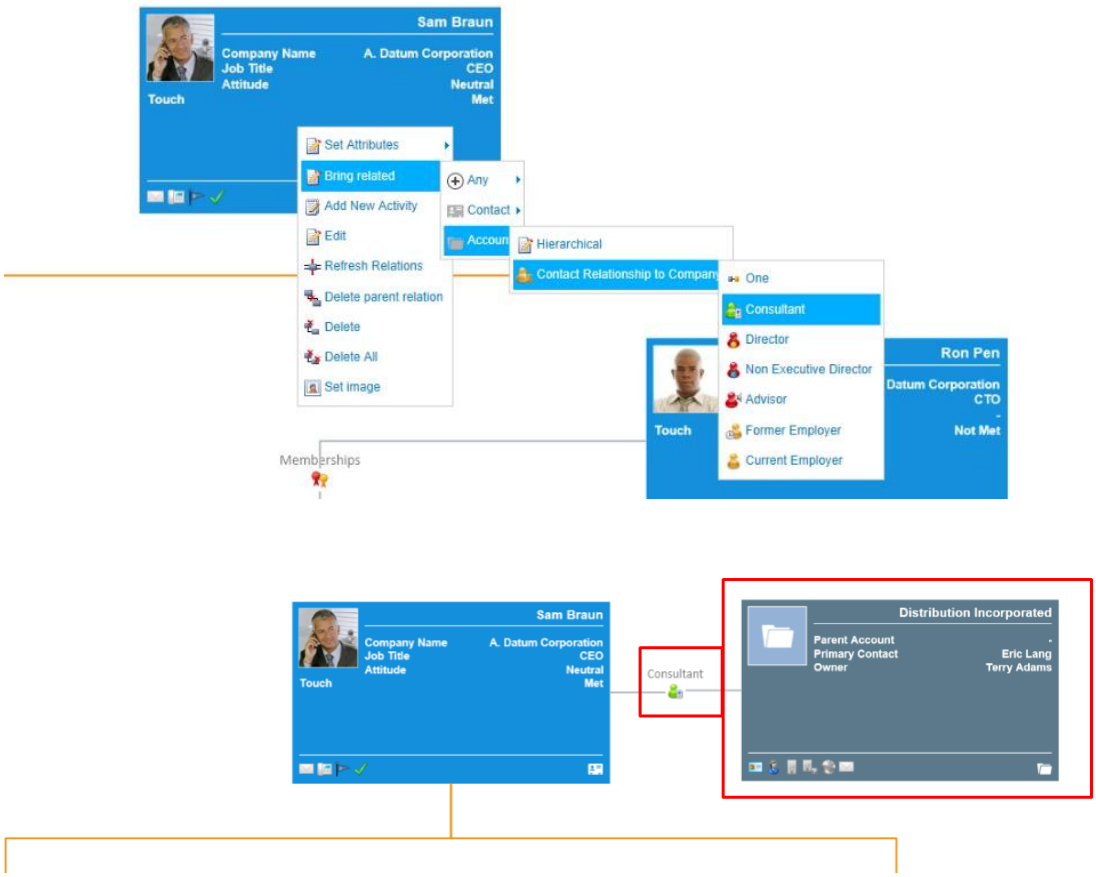


Check **Upload a picture from your computer** radiobutton, then click **Browse** button and select the picture:

Click **OK** and you will see the selected picture:

Bring related

Relationship Charts allows users to explore relationships. Working with a chart you can right click on the actor and using the context menu you can bring related entities to the chart– for example for a contact you can bring his former colleagues to the chart, for a deal you can bring the broker who worked on it, for a project you can bring all project members and so on. And you can start from one contact and then gradually explore how this contact is related to everything else – projects, opportunities, other people and so on.



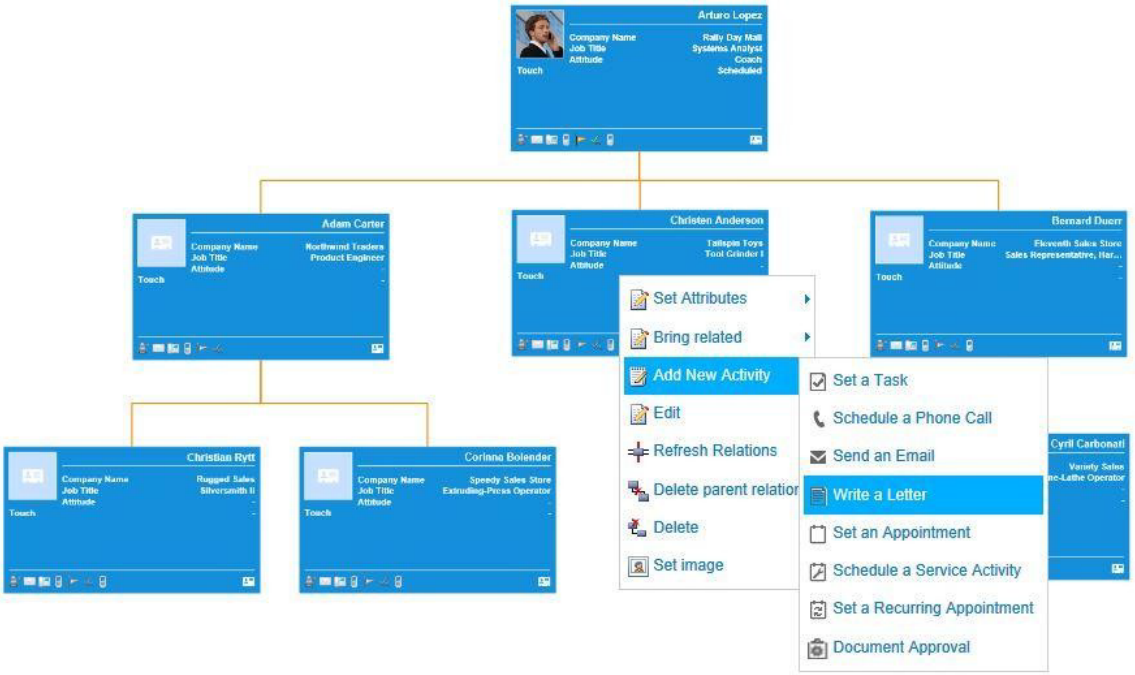
Bring Related functionality works through all relationship types, stored in CRM.

Attribute groups

Attribute groups separate information displayed for the actor on the chart by type. Only Silverlight based charts allow Attribute Groups. You can select the required group to be displayed on the Chart: click on the Attribute Groups (Expand Cards) icon in the bottom right footer area and then click on navigation arrows ('slide right' and 'slide left') – the group order will change.

Add new activity

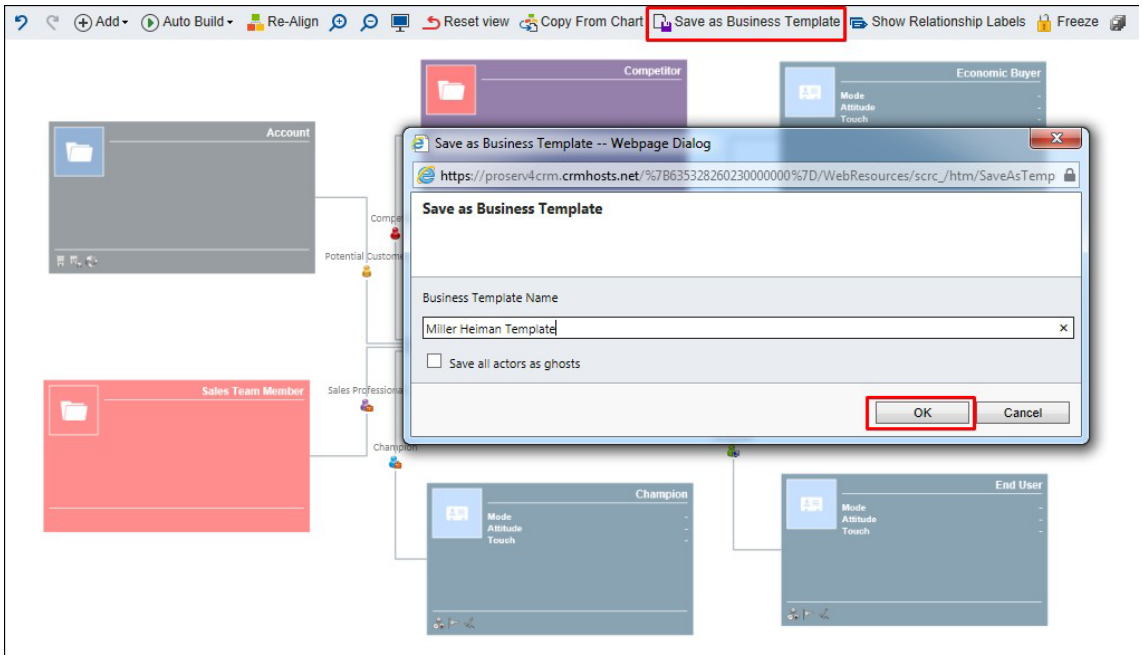
Relationship Charts allows users to create activities directly from the chart. It helps people to work with data without “leaving” the chart. If you are looking at a contact and you want to schedule a call, just right-click on the Actor and select a New Activiti from the drop-down list.



Save as business template

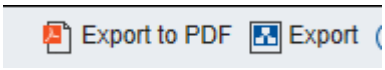
Save as Business Template – allows saving templates that can be exported afterwards together with Relationship Charts configuration.

Relationship Charts can be used as a guidance tool. The special business templates containing ghosts and hints associated with ghosts can guide you through working on opportunities, projects and so on. They will provide visual indicators of what information is missed and what needs to be done now. This functionality helps companies re- implement their best practices in a visual way.

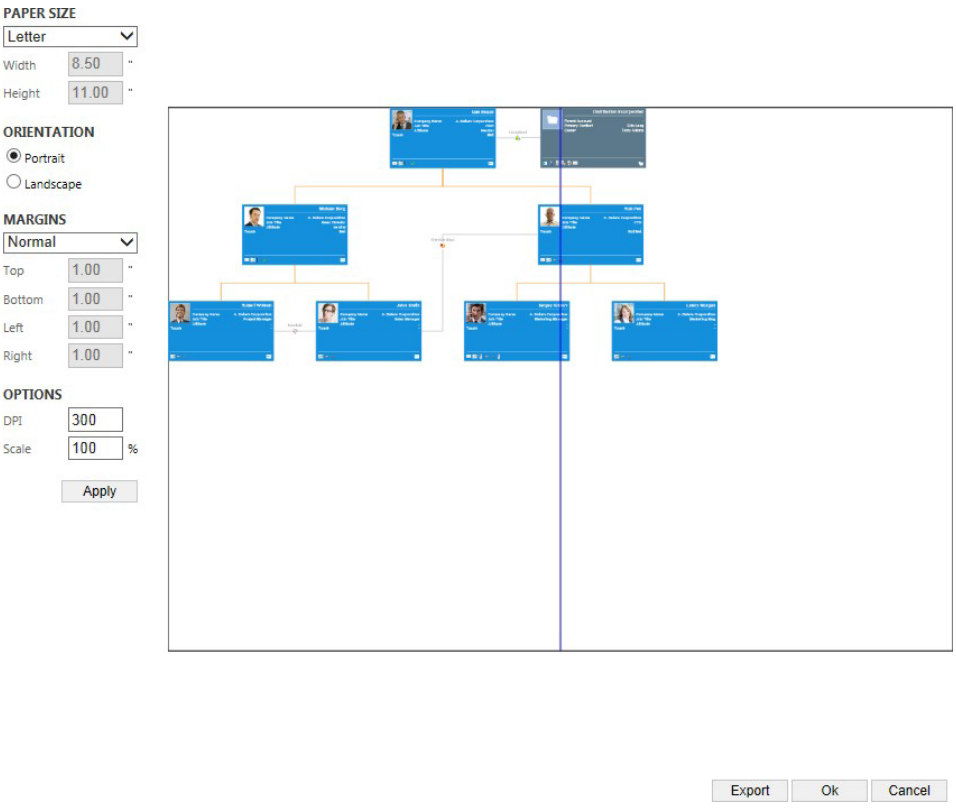


Exporting Relationship Charts

Once you've got your chart looking the way you want it, you can export it and print it to share with other colleagues. In Relationship Charts, this is simple. To export charts as a picture click **Export** on the toolbar and save your Chart.



If you export chart to PDF, you will be able to modify printing settings to fit the page size.



PAPER SIZE

Letter

Width 11.00 "

Height 8.50 "

ORIENTATION

Portrait

Landscape

MARGINS

Normal

Top 1.00 "

Bottom 1.00 "

Left 1.00 "

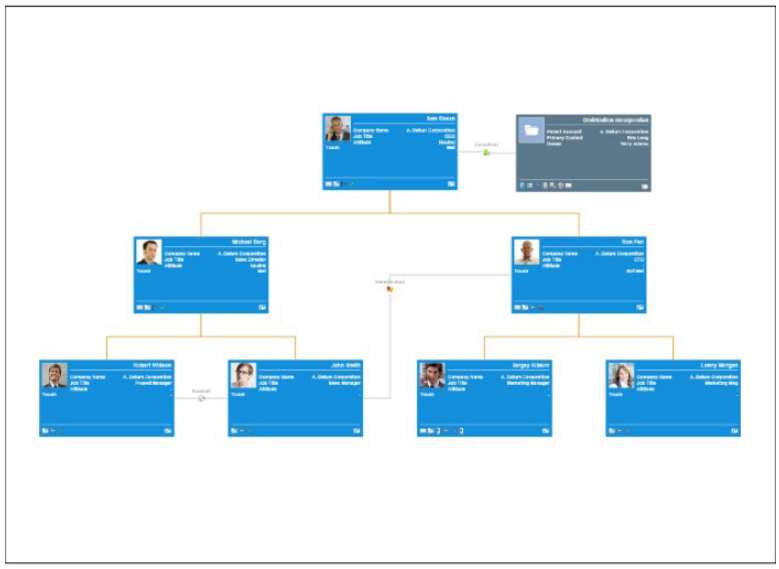
Right 1.00 "

OPTIONS

DPI 300

Scale 90 %

Apply



Export Ok Cancel