

Relationship Charts for Microsoft Dynamics CRM Reveal the Relationships in CRM

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



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)



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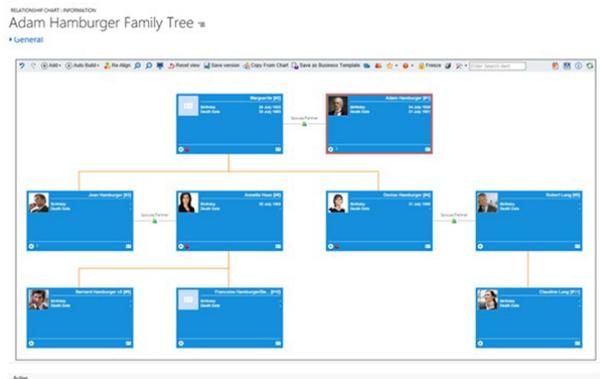
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Why you need Relationship Charts in your Dynamics CRM

A large body of research indicates that **visual cues help us to better retrieve and remember information**. Our brain is mainly an image processor (much of our sensory cortex is devoted to vision), not a word processor. Words are abstract and rather difficult for the brain to retain, whereas visuals are concrete and, as such, **more easily remembered**.

At WaveAccess we know this very well. As experts in Microsoft Dynamics CRM we have noticed that there is a small but crucial thing that we can improve to make users' lives easier.

We have made Relationship Charts – a product your brain will say thank you for.



What is Relationship Charts?

Relationship Charts is a great Intuitive application that allows you visualize complicated relations and hierarchies between your employees, clients, contracts, business entities etc. in Microsoft Dynamics CRM

Good examples of what you get with Relationship Charts by WaveAccess:

- Hierarchy Chart with cross functional relationships
- Who knows whom Chart
- Opportunity Decision Makers Chart
- Organization Charts
- My Sales Leads Map
- Genealogy Tree
- Competitors Map

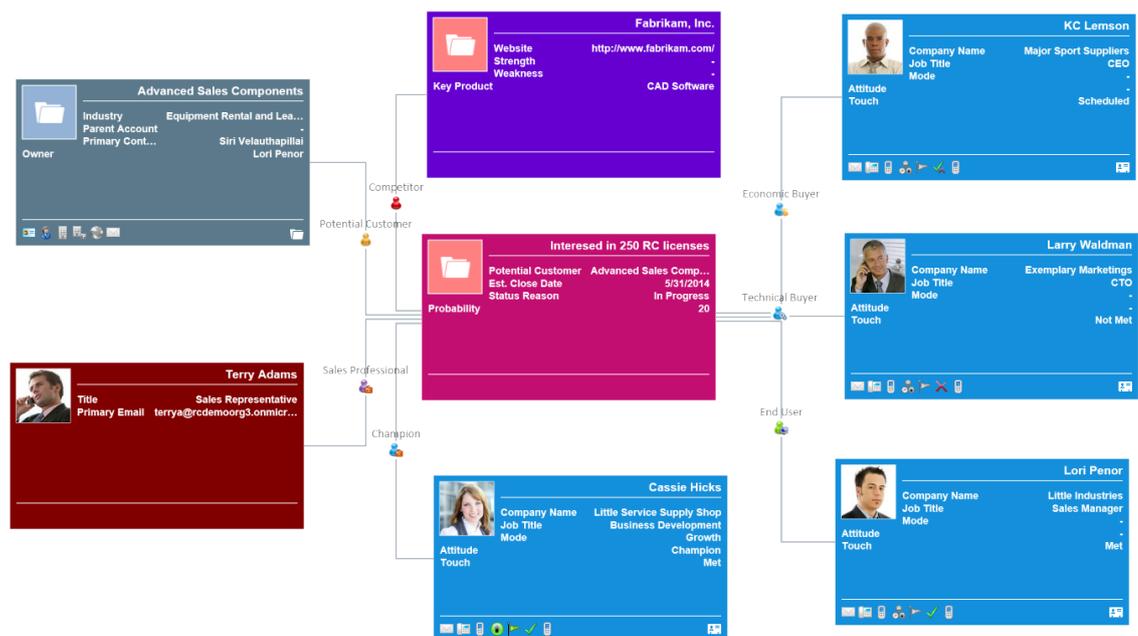


Fig. 1 Sales Opportunity Map.

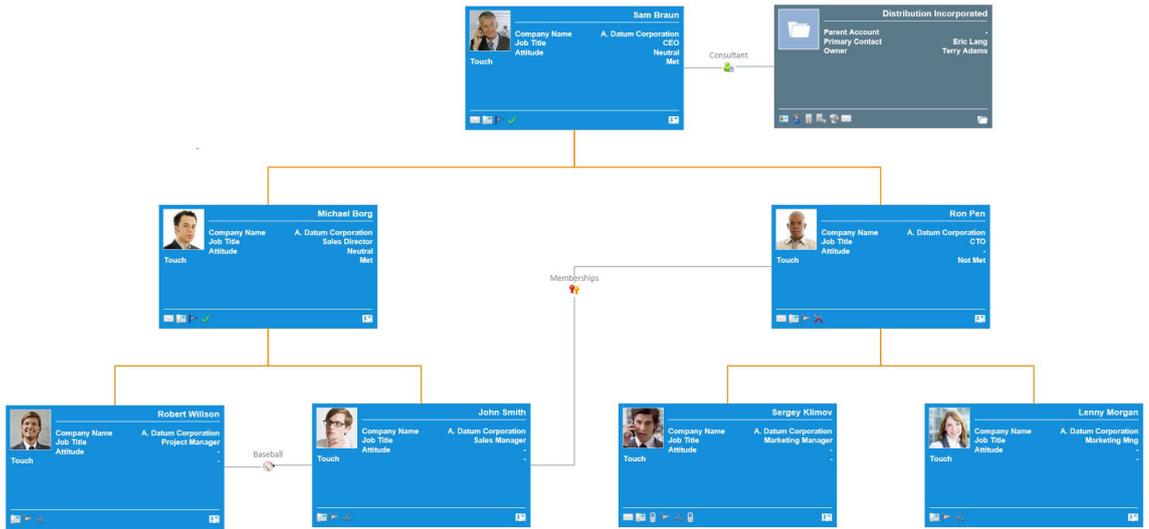


Fig. 2 Organization Chart.

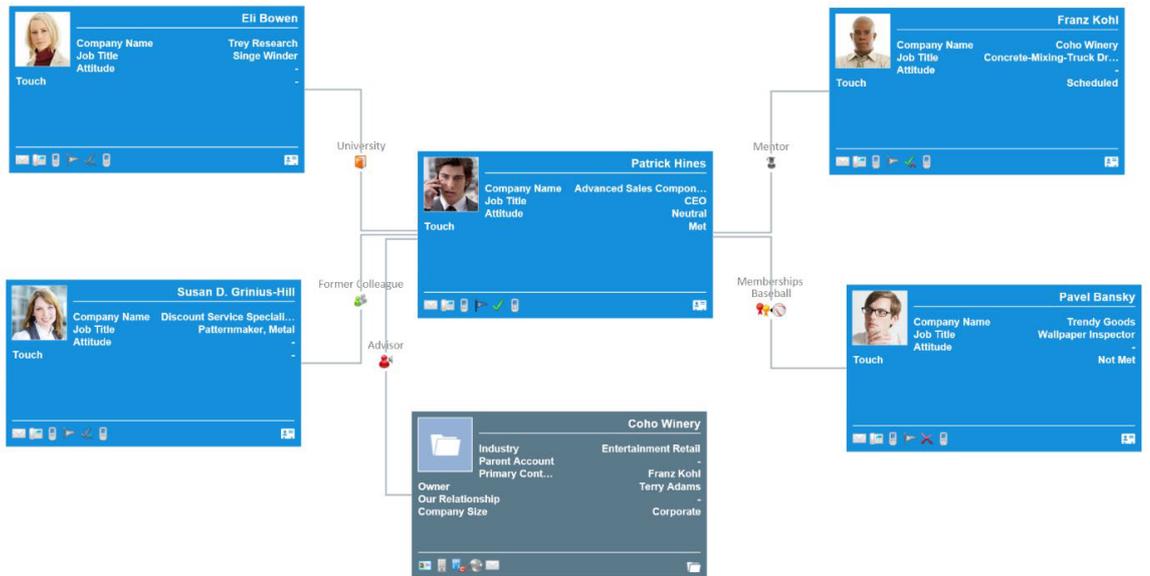


Fig. 3 Business Connections Map.

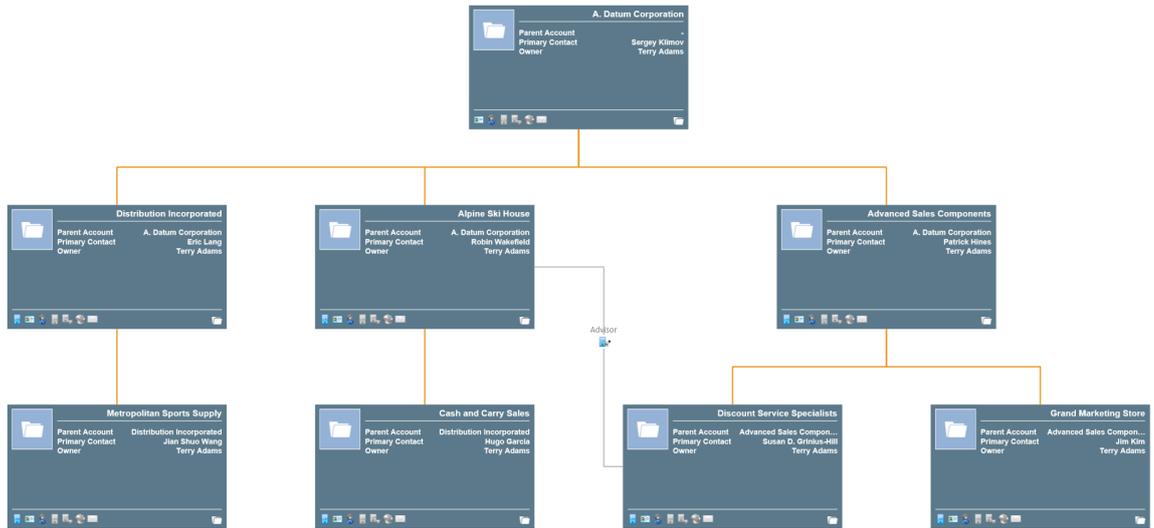


Fig. 4 Subaccounts Chart.

Any complexity of connections you can imagine is available with Relationship Charts.

Our easy-to-use tool allows you to display any connections between CRM entities.

What you can do with Relationship Charts

- **Make your organization tree** – very useful for HRs and newcomers!
- **Build a market map** with competitors and influencers – ideal for finding your way in the business world.
- **Align your salespeople to their opportunities** – and more, create a strategy for every opportunity using an activity scheduler, color coding and icons, displaying different roles and complexity of their relations and adding new entities when needed.

Key Features

- Use our embedded chart templates or create any charts for any entities (Org Charts, project participants' chart, opportunity influence chart and many others).
- Drag and drop right on the map to build connections and relationships.
- Set automatic build of Org Charts as well as Charts with Sub-accounts.
- Export chart to PDF to print it easily, export as a picture to email, post to web.
- Display related connections for any chart participant (we call them Actors).
- Changes made on charts are updated into the CRM database.
- Lock charts to archive from further changes.
- Set Ghost participant – a placeholder for future investigation.
- Available for iPad and Surface.

Relationship Charts additional value over Microsoft CRM embedded visualization functionality

- Display relationships across different entities.

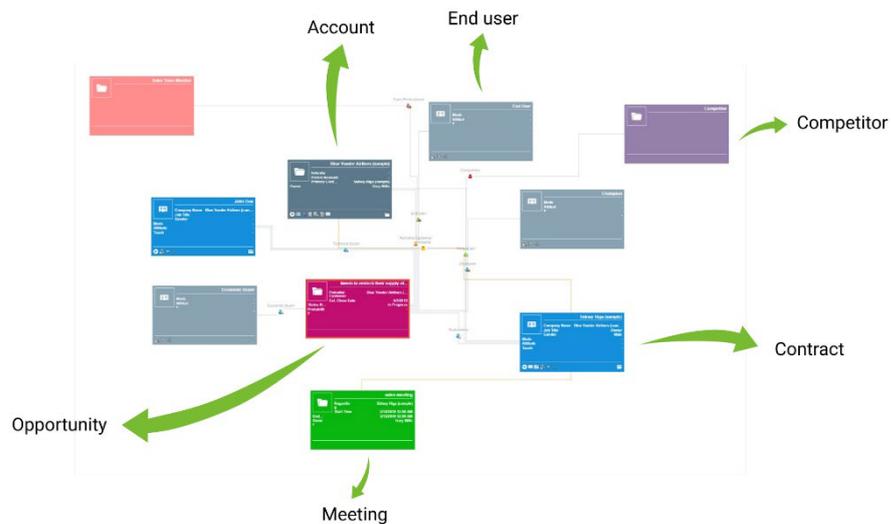


Fig. 5 Different roles and entities are color-coded.

Change existing or create new relationships between entities by dragging and dropping them on each other.



Fig. 6 Easy and intuitive Drag and Drop connection.

- Work with big charts containing more than 20 nodes and display more than 4 fields for each entity type.

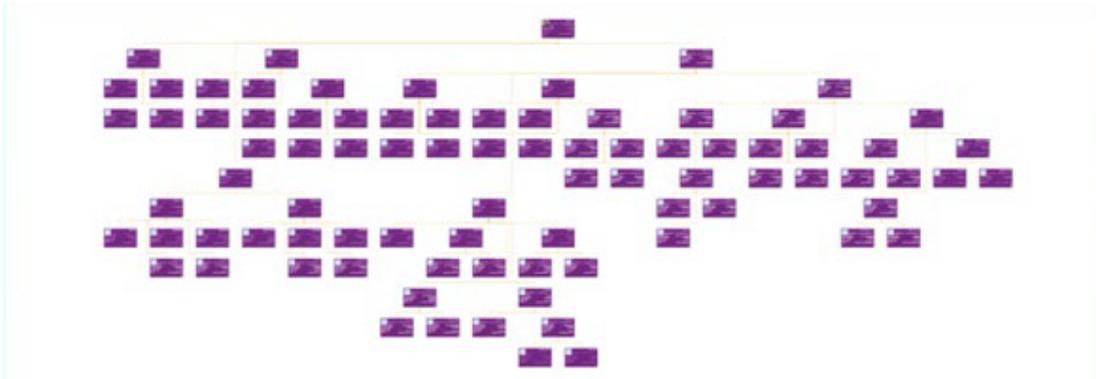


Fig. 7 Use Full Screen tool to display large maps.

- Visualize Microsoft Dynamics CRM built-in relationships (1:M, M:M) and CRM connections and add new Activities directly from a chart.

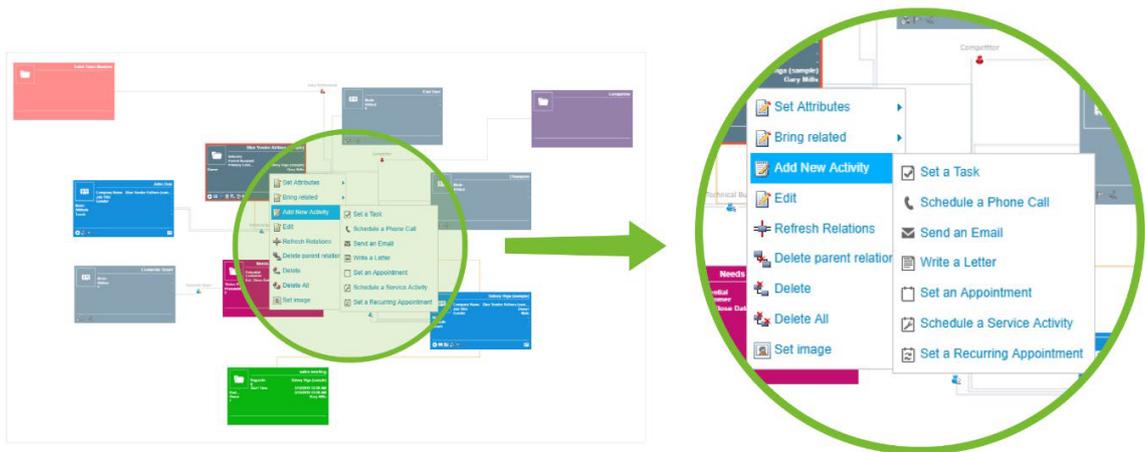


Fig. 8 Activities are added right from the chart.

- Highlight Actors with a certain attribute.

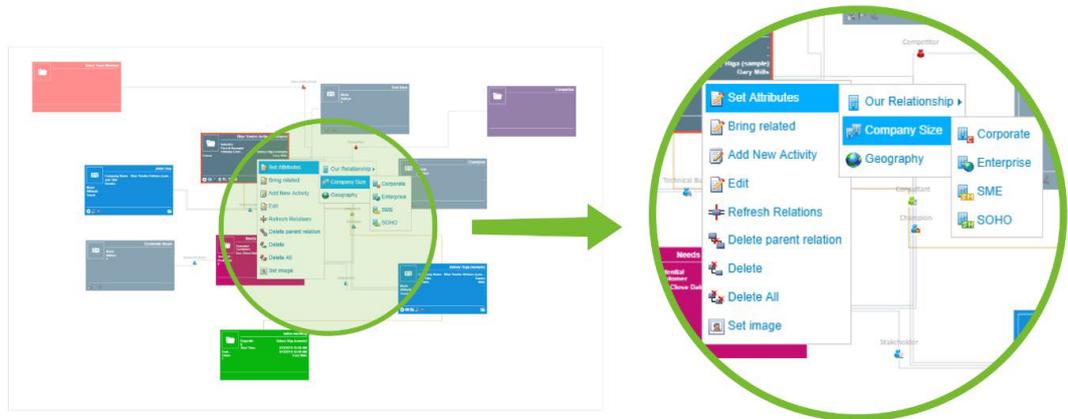


Fig. 9 Depending on the selected attribute, the corresponding Actors are highlighted on the chart.

- Setting Ghost Participant – placeholder for future investigation.

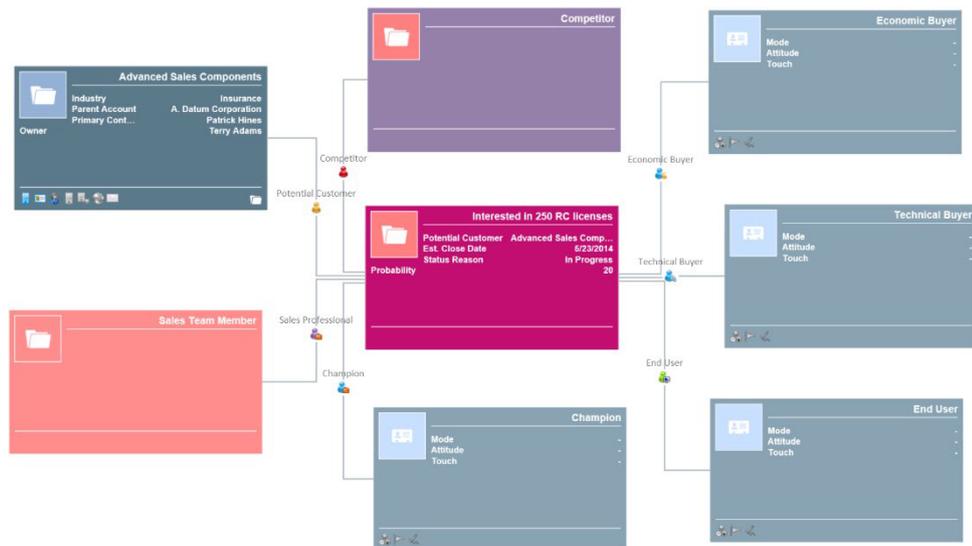


Fig. 10 Ghost Actors and displayed grey - until you get to know them.

Installation Notes

Please note that Relationship Chart by WaveAccess works with the next MS Dynamics CRM versions: Microsoft CRM 4.0, Microsoft CRM 2011, Microsoft CRM 2013 Online, Microsoft CRM 2013, Microsoft CRM 2015, Microsoft CRM 2016, Dynamics 365

To install this application, you will require Global Administrator, System Administrator or System Customizer access. Please refer the Installation Guide for further details.

Licensing

Monthly subscriptions and separate license purchase are available. Please contact us hello@wave-access.com for more details.



Does your business require a personalized solution
that integrates a range of systems?

Contact us and get a free discovery session and a project quote.

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