



*"Talent wins games, but teamwork and intelligence wins championships."  
Michael Jordan*

## INFINITY LOOKUP

Documentation

13/01/2021

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# Summary

Infinity Lookup for Dynamics 365 allows you to create multi lookups that fit right in with other Dynamics 365 fields, providing seamless functionality to standard lookups.

The control, which binds to a text field, allows you to link with any many-to-many (N:N) relationship to ensure data is kept accurate and can be reported against. The text field also stores a list of selected records, which is perfect for displaying in views.

Because this control is bound to a text field, you can easily make the control required on your form, allowing you to ensure a value is entered both on create and on update of a record.

This works great for creating tagging functionality, or for making a N:N relationship required on create which is not possible with standard subgrids.

Key Benefits:

- Works with any N:N relationship
- Provides a seamless experience to normal lookups, including:
  - Colour scheme matching the Dynamics 365 theme
  - Open record by clicking the tag label
  - Search results with entity icons
  - Create new records from the search results
  - Follows Dynamics 365 security (disabled for users without append/append to)
  - Changes are only saved once the form is saved
- Works on create or update forms
- Allows for making 'required' relationships
- Instant search when clicking into the field, without having to press enter or click search
- Customise the search results, including the fields displayed and/or searched against, and the filters applied
- Display selected values in a text field, useful for views
- Built using Microsoft Dynamics 365's Power Apps Control Framework (PCF)

# Installation

The following steps should be followed once in each Dynamics 365 environment. This will install the Infinity Lookup solution into your Dynamics 365 environment, enabling you to add multi-lookup controls to your forms.

1. Open Infinity Lookup on Microsoft AppSource. (<https://appsource.microsoft.com/en-us/product/dynamics-365/magnetism.multilookup>)
2. Click **Free trial**.

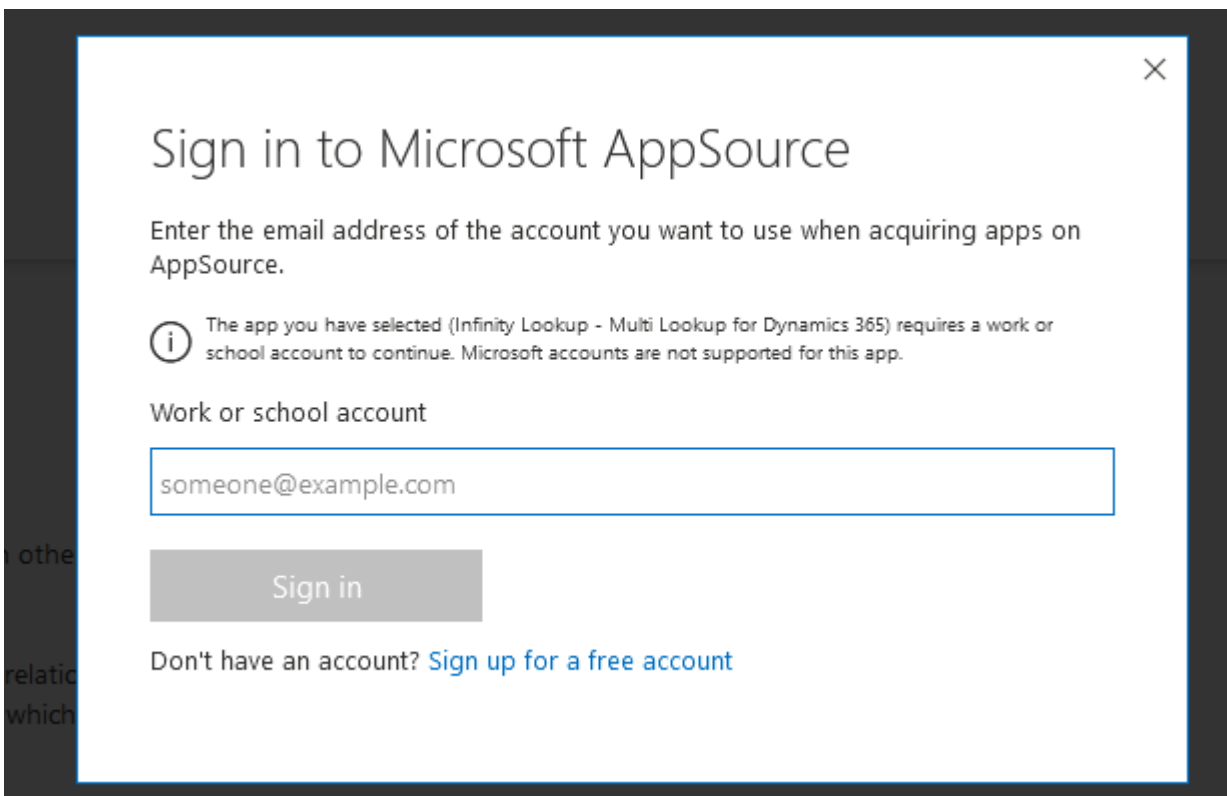
Microsoft | AppSource Apps Consulting Services

Apps > Infinity Lookup - Multi Lookup for Dynamics 365



**Infinity Lookup - Multi Lookup for Dynamics 365**  
Magnetism  
Dynamics 365 Marketing Dynamics 365 Sales Dynamics 365 Customer Service Dynamics  
Free trial  
☆☆☆☆ (0 Ratings) Write a review  
Free trial Save to my list


3. Sign in with the email address of your Dynamics 365 user if prompted (if you're already signed in, skip this step).



- If this is your first time installing a Microsoft AppSource solution, you may be prompted to enter some profile information.

✕

## One more thing ...

 **Infinity Lookup - Multi Lookup for Dynamics 365**  
By Magnetism

This app requires some basic profile information. We have pulled your Microsoft Account data to help you get started. AppSource will save your information for next time.

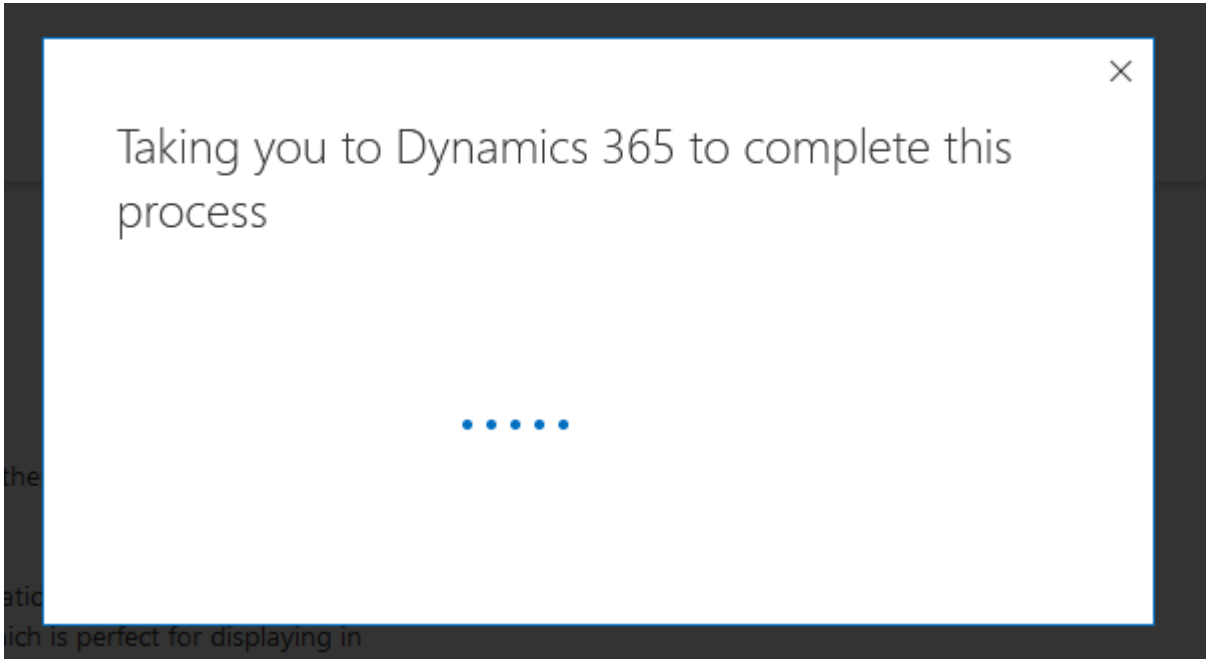
Name *	Demo	Magnetism
Work email *	Demo@magnetismsolutions.com	
Job title		
Company	Magnetism Solutions Ltd	
Country / region *	New Zealand <span data-bbox="1182 1014 1209 1037">▼</span>	
Phone number *	64234567890	

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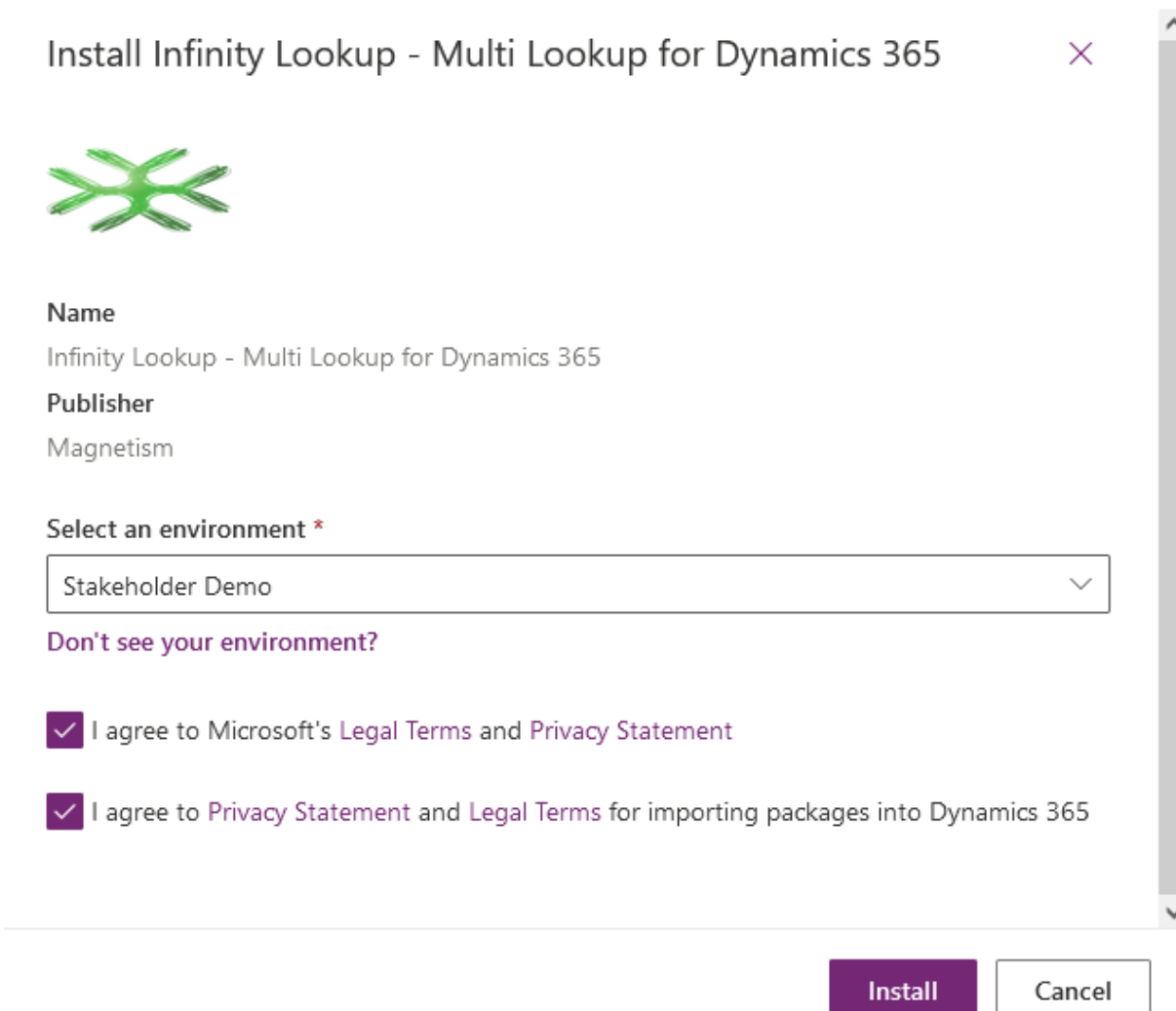
You're signed in as Demo Magnetism (Demo@magnetismsolutions.com).

[Continue](#)

- Once confirmed, you'll be redirected to the Dynamics 365 admin center to complete the installation.



- Select the environment you wish to install the solution into, and then click **Install**.



- The solution will automatically install in the background. You can check the status of the import under Dynamics 365 apps.

The screenshot shows the Power Platform admin center interface. At the top, there is a dark header with the text "Power Platform admin center". Below this, a navigation bar contains a "Details" link with an information icon. A yellow banner displays a notification: "Infinity Lookup - Multi Lookup for Dynamics 365 installation started at 12:56 pm, 7/23/2021 by Demo Magnetism." The main content area shows the breadcrumb "Environments > Stakeholder Demo > Dynamics 365 apps" and a sub-header "Check the status of Dynamics 365 apps and manage them across your org. [Learn more](#)". Below this is a table with three columns: "Name", "Status", and "Publisher".

Name ↑	Status	Publisher
Environment variables	⋮ Installed	Microsoft Dynamics 365
Infinity Lookup - Multi Lookup for Dynamics 365	⋮ Installing...	Magnetism
Microsoft Flow Extensions	⋮ Installed	Microsoft Dynamics 365

- Once the installation is complete, you can start adding the Infinity Lookup controls to your forms. Follow the Usage steps below explaining how to add each control.

# Usage

The following steps should be taken each time a new multi-lookup control needs to be added to a form.

1. Create a N:N relationship between the primary table and the lookup table. Make a note of the 'Name' as this is used in the control properties.

The screenshot shows the 'Relationship' configuration page for 'Organisation to Contact'. The 'General' tab is active. The 'Current Entity' is 'Organisation' and the 'Other Entity' is 'Contact'. Both entities have 'Display Option' set to 'Do not Display' and 'Display Area' set to 'Details'. The 'Relationship Definition' section shows 'Name' as 'new\_account\_contact', 'Relationship Entity Name' as 'new\_account\_contact', and 'Searchable' set to 'Yes'. The top right corner indicates 'Working on solution: Default Solution'.

2. Create a 'Single Line of Text' field on the primary table where the infinity lookup control will be displayed. Make sure the max-length is large enough to store the selected values you're expecting.

The screenshot shows the 'Field' configuration page for 'New for Organisation'. The 'General' tab is active. The 'Schema' section shows 'Display Name' as 'Contacts', 'Name' as 'new\_Contacts', and 'Field Requirement' set to 'Optional'. 'Field Security' is set to 'Disable' and 'Auditing' is set to 'Enable'. The 'Type' section shows 'Data Type' as 'Single Line of Text', 'Field Type' as 'Simple', 'Format' as 'Text', 'Maximum Length' as '1,000', and 'IME Mode' as 'auto'. The top right corner indicates 'Working on solution: Default Solution'.

**Note:** Setting the Field Requirement to be Business Required will make the lookup control required on the form, ensuring one or more lookup values are selected, both on create and update of a record.



3. Add the new Text field to the form of the primary table.

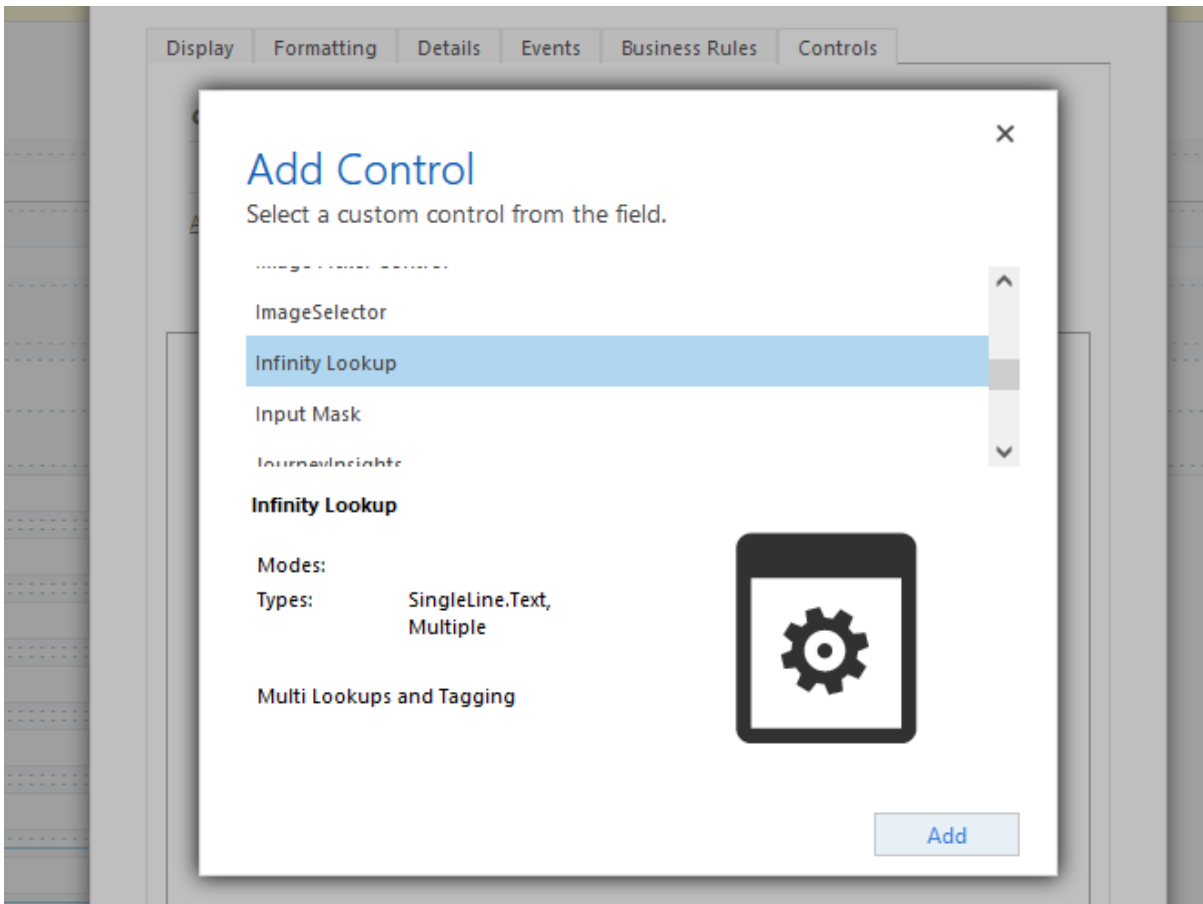
The image shows a form layout with three text input fields. The first field is labeled 'Website' and contains the text 'Website'. The second field is labeled 'Parent Account' and contains the text 'Parent Account'. The third field is labeled 'Contacts' and contains the text 'Contacts'. This third field is highlighted with a blue border. Below these fields is a section labeled 'Relationships'.

4. Edit the **Field Properties** for the field.
5. Under the **Controls** tab, select **Add Control...**

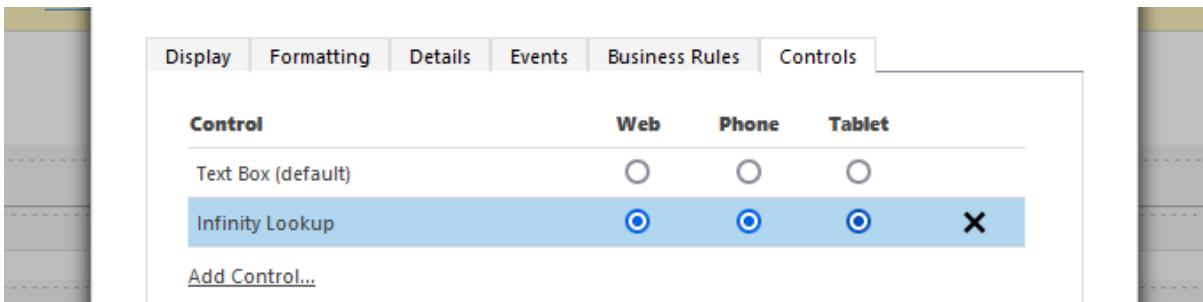
The image shows the 'Field Properties' dialog box with the 'Controls' tab selected. The dialog has a title bar with 'Enable Security Roles' and a close button. The main content area has the title 'Field Properties' and the subtitle 'Modify this field's properties.' Below this are several tabs: 'Display', 'Formatting', 'Details', 'Events', 'Business Rules', and 'Controls'. The 'Controls' tab is active and shows a table with the following structure:

Control	Web	Phone	Tablet
Text Box (default)	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
<a href="#">Add Control...</a>			

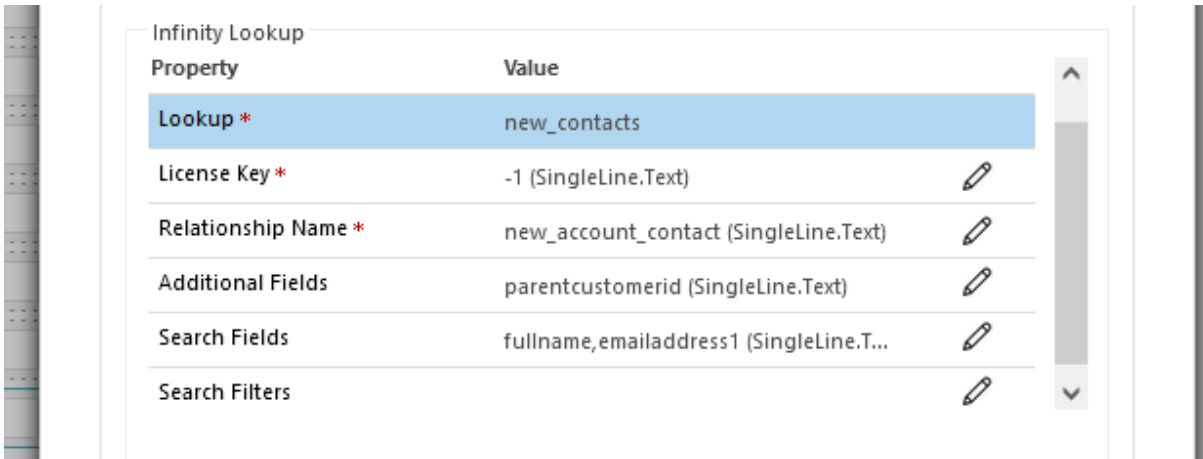
6. Select the **Infinity Lookup** control, and click **Add**.



7. Make sure to set the Infinity Lookup control as the selected Web, Phone, and Tablet control.



8. Fill out the Infinity Lookup control properties:
  - a. **Lookup:** The field bound to the control. Stores a comma separated list of names.
  - b. **License Key:** License Key provided by Magnetism after purchasing a license. Use -1 for a 1 month trial.
  - c. **Relationship Name:** Schema name of the N:N relationship.
  - d. **Additional Fields:** (Optional). Schema names of additional fields to display in the search results, as a comma separated list.
  - e. **Search Fields:** (Optional). Schema names of fields to search against, as a comma separated list. If unspecified, the primary field is used.
  - f. **Search Filters:** (Optional). The [FetchXML filter](#) to apply to the search. If unspecified, this defaults to Status = Active.



9. Click **OK** to close the Field Properties, then **Save** and **Publish** the form.

10. Open a record from the primary table to see the new control.

