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# c360 Relationship Chart User Guide

Relationship Chart version 1.2.1 – Microsoft CRM 1.2 compatible

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# Relationship Chart _____

### Overview

c360 Solutions Relationship Chart is a Microsoft CRM enhancement that provides Microsoft CRM users the ability to model complex, many-to-many relationships between Contacts, Accounts, Opportunities and CRM Users. Relationship Chart provides a graphical, organization chart displaying the types and hierarchies of relationships. Relationship Chart allows Microsoft CRM users to:

- Link multiple Accounts to Contacts, Opportunities and other Accounts
- Link multiple Contacts to Accounts, Opportunities and other Contacts
- Link multiple Opportunities to Accounts, Contacts and other Opportunities
- Link multiple Users to Accounts, Contacts and Opportunities
- Define the relationship type when a link is made
- Build graphical, organization charts based on links

### Viewing Relationship Chart

Relationship Chart is implemented as a tab on Contact, Account and Opportunity records in Microsoft CRM. Figure 1 shows the Relationship Chart screen on an Account record.
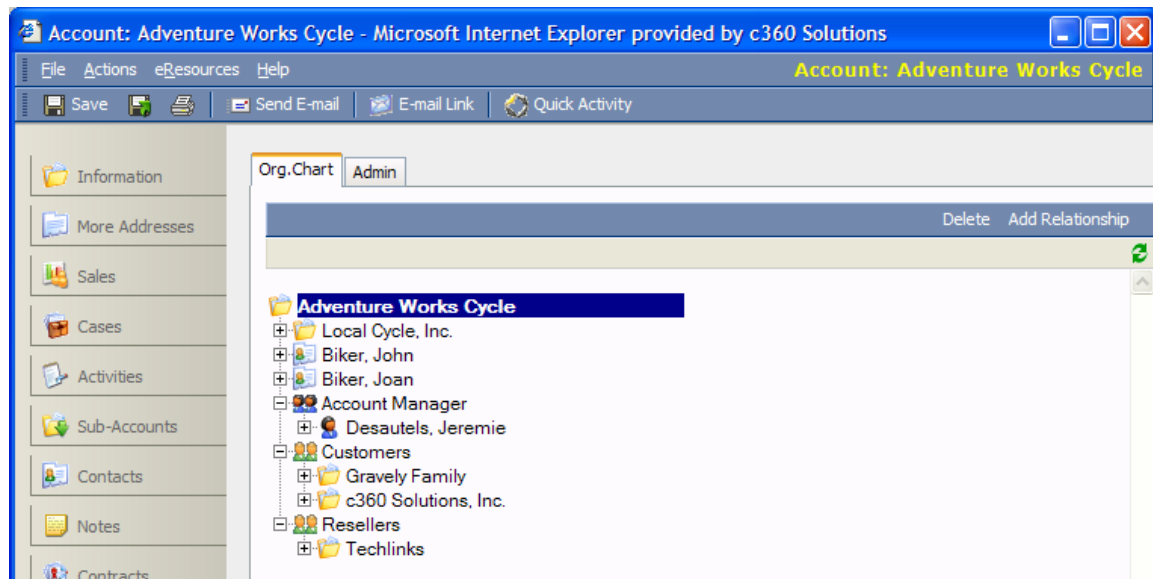


**Figure 1**: The Relationship Chart Screen (Account record example) shows both native Microsoft CRM relationships as well as relationships that you configure through Relationship Chart.

### Understanding Relationships

Out of the box Relationship Chart will show you the native relationships allowed by Microsoft CRM. These are Accounts linked to Sub-Accounts, Contacts linked to

Accounts and Contacts and Accounts linked to Opportunities. For example, compare figure 2 to figure 3. Figure 2 shows the standard Microsoft CRM Sub-Accounts view on an Account record. Notice in Figure 3 how this same information is displayed by default in Relationship Chart.
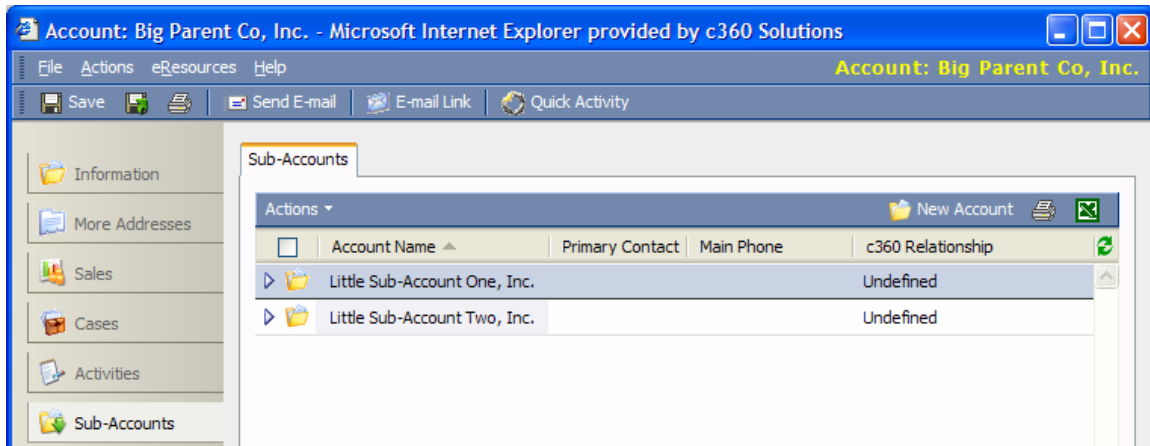


**Figure 2**: Sub-Accounts listed on an Account record in the standard Microsoft CRM Sub-Accounts view
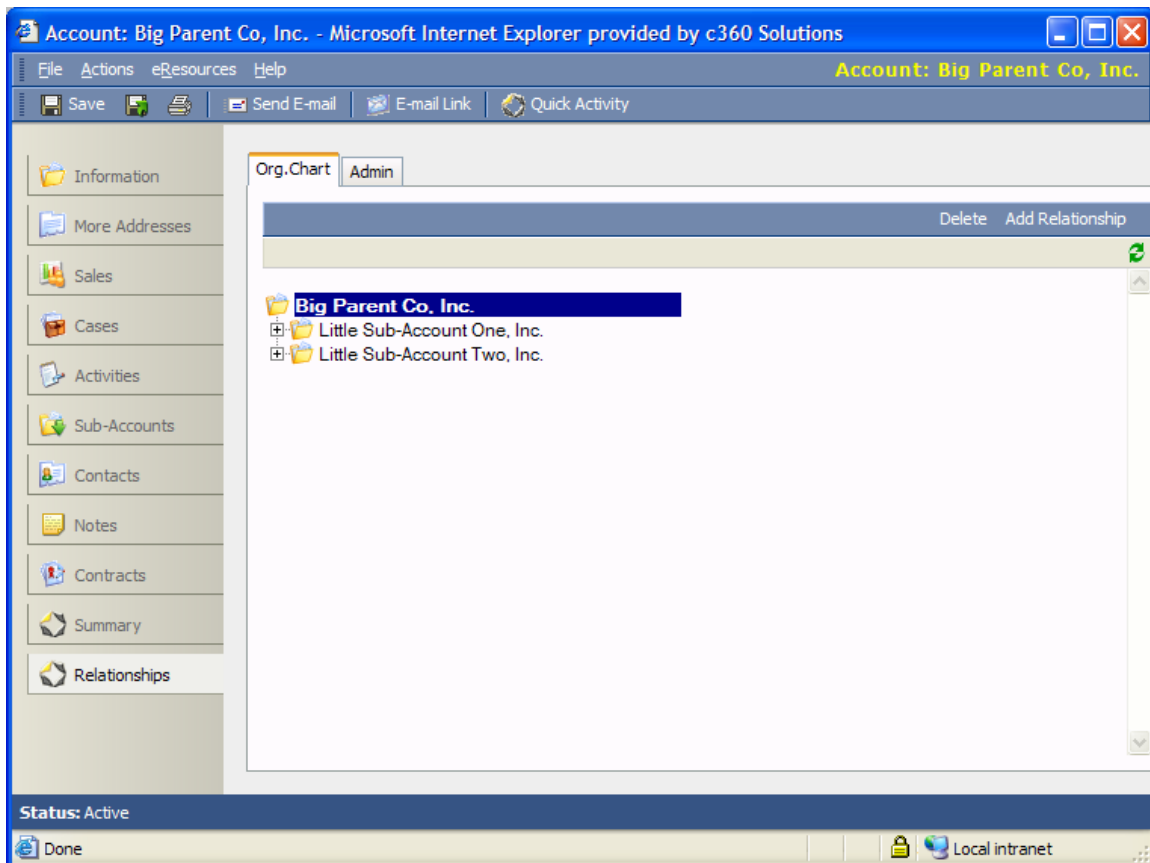
**Figure 3**: Sub-Accounts displayed on an Account record in the Relationship Chart view

It is important to note that while Microsoft CRM's standard functionality allows you to link Accounts to Sub-Accounts, Contacts to Accounts, etc. none of these links contain a definition of the relationship between the linked entities.  For example if you link a Contact to an Account there is no way to define that the linked Contact is an employee, consultant or attorney for the account.  Similarly, a simple link between two accounts would not tell you whether one account is a reseller, customer or supplier to the other.  Relationship Chart allows you to define the links it creates but you first must create those definitions.

**Configuring Relationship Chart - Defining Relationship Types**

To configure Relationship Chart relationship types you must be logged in as a user with the Microsoft CRM **System Administrator** role.  Once logged in you can open any Contact, Account or Opportunity.  Select the record's Relationships tab and then select the Admin tab at the top of the relationship view.  Figure 4 illustrates the Admin tab view.
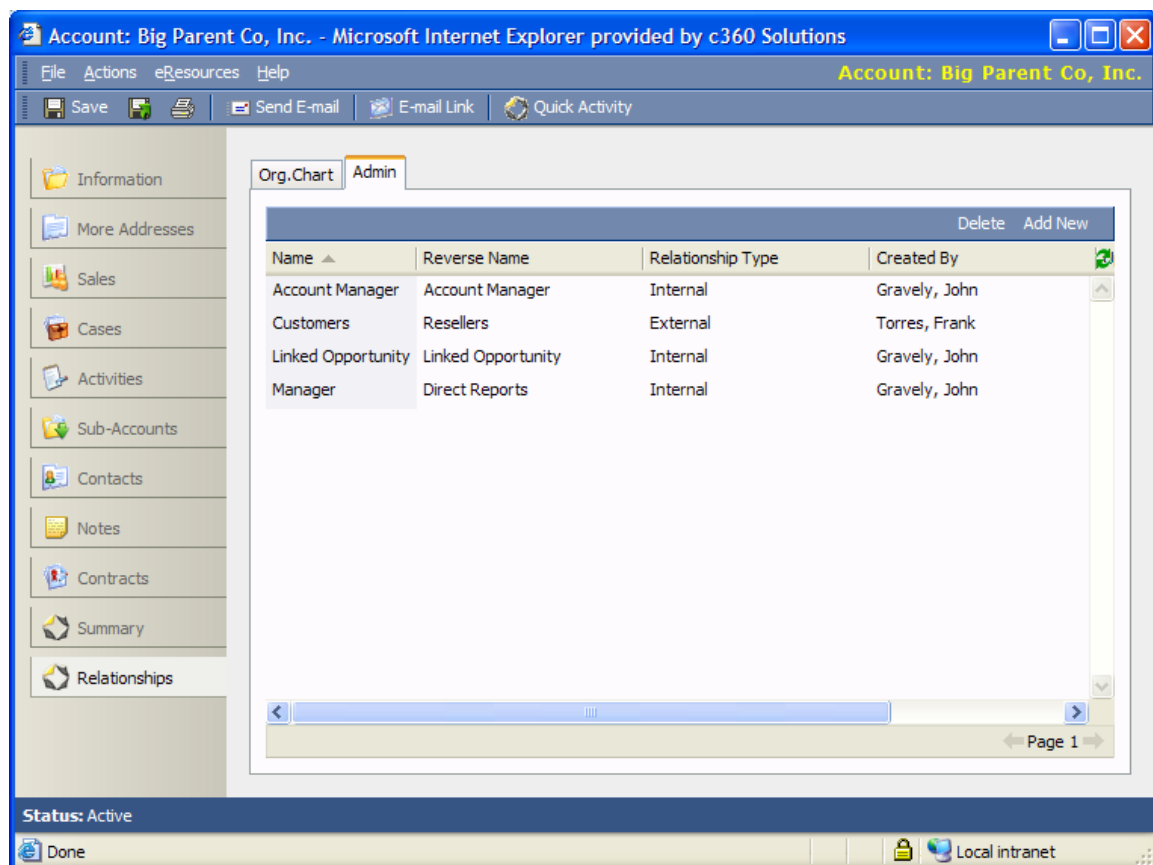


**Figure 4**:  The Admin tab of Relationship Chart can be used only by Microsoft CRM users with the System Administrator role.

The Admin tab lists any relationship types that have been created if they exist.  To create a new relationship type click the 'Add New' button.  The screen in figure 5 will appear.
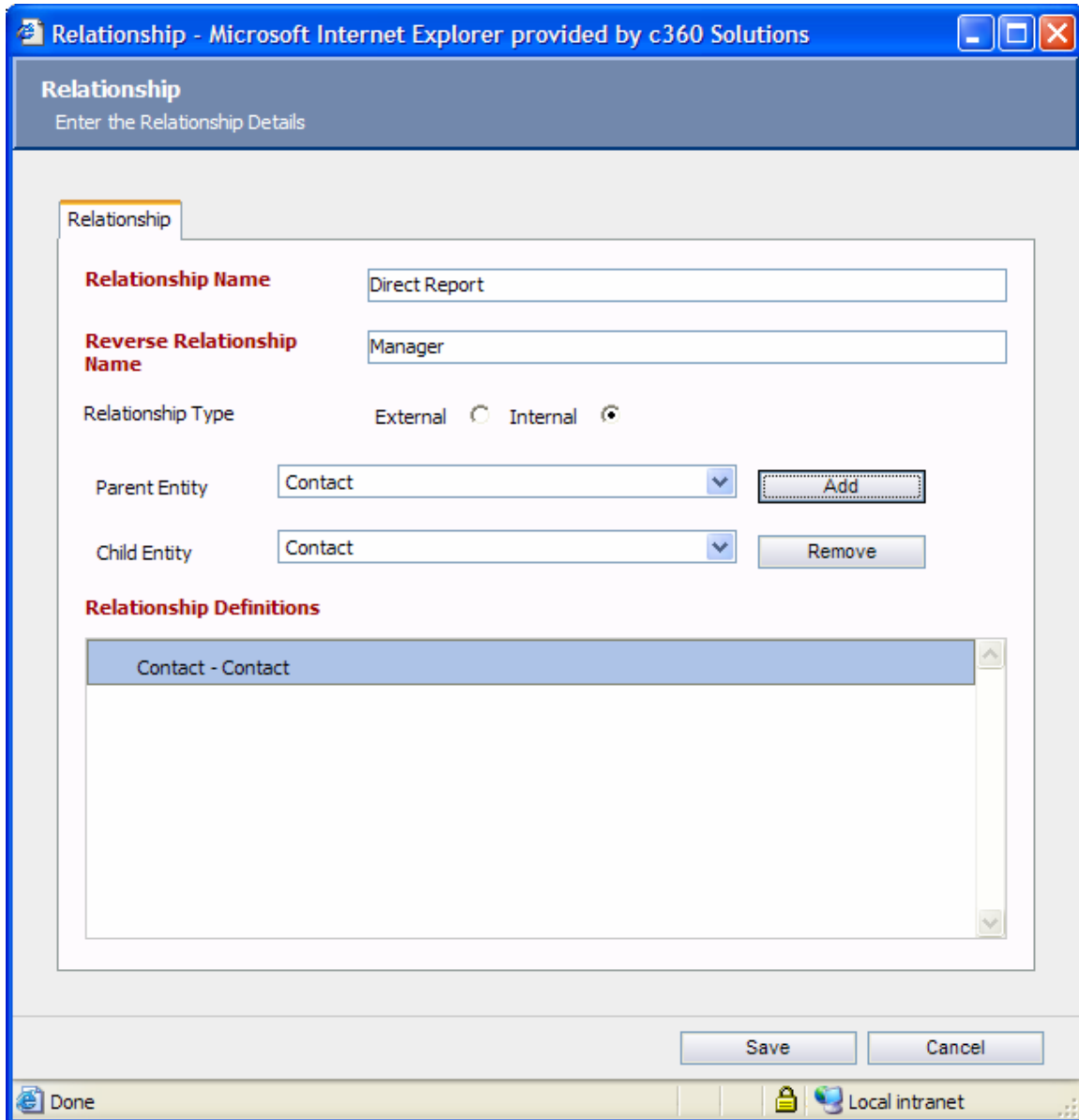


**Figure 5**:  Defining relationships in Relationship Chart.

This screen allows you to configure the following items:

*Relationship Name* – the name of the relationship you will be creating between the parent and child entities.  For example, you may want to link accounts to their resellers.

*Reverse Relationship Name* – By default, Relationship Chart shows the relationship between two records regardless of which of the two records you are viewing.  For this reason, it is important to be able to define separate labels for the relationship.  A clear example of this is the concept of Managers and Direct Reports.  If Bob is Sally's Manager then it stands to reason that when I am looking at Bob's record I will want to see that Sally is Bob's Direct Report.  Figures 6 and 7 illustrate this concept
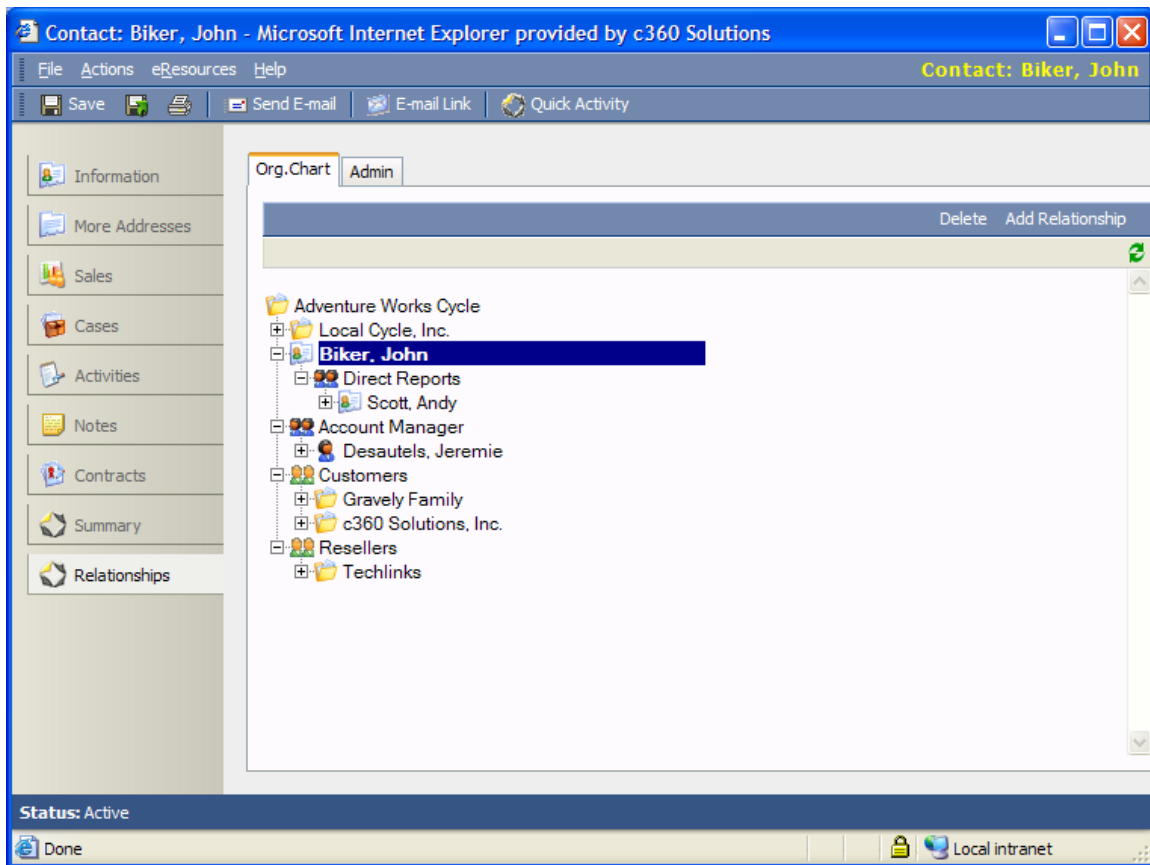


**Figure 6**: John Biker's record indicates that Andy Scott is his Direct Report.
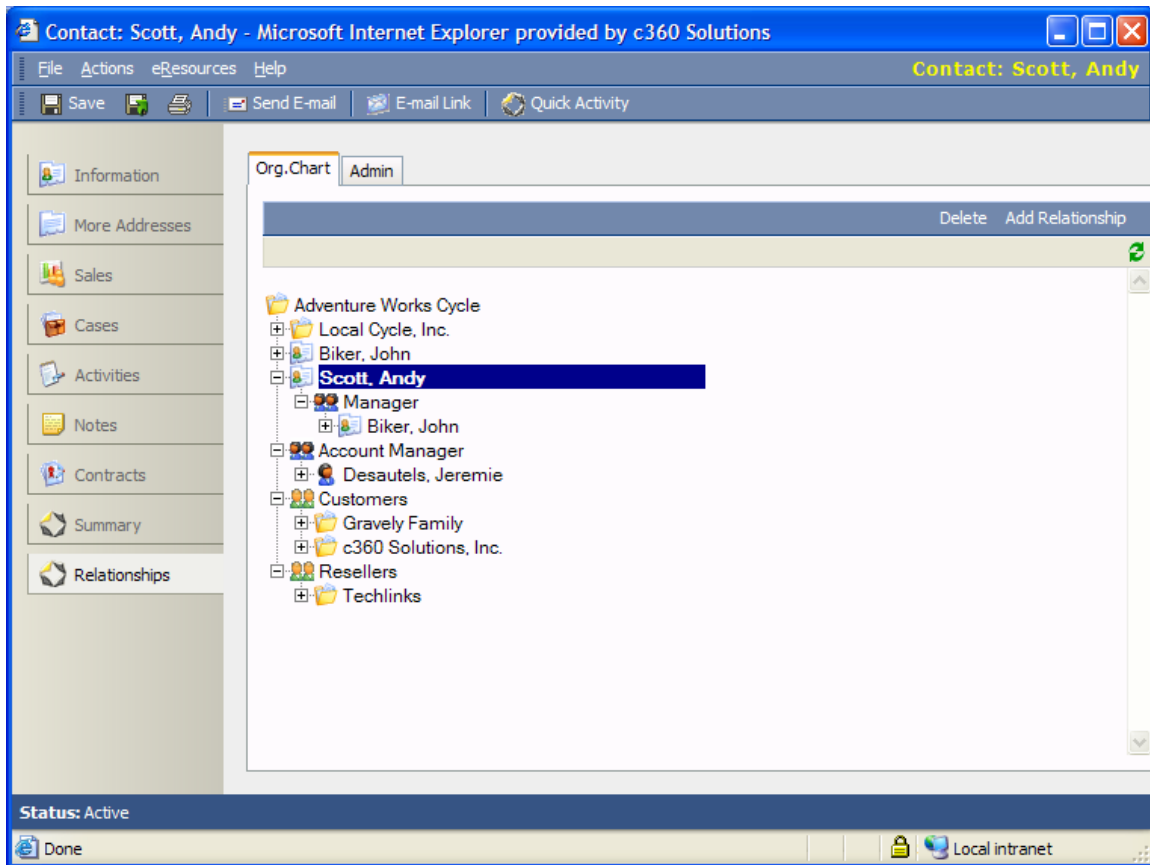
**Figure 7**: Andy Scott's record indicates that Jon Biker is his Manager.

*Relationship Type* – This option simply controls the icon that is used with the relationship type heading. Selecting 'external' will cause the green icon to display as shown in figure 8.
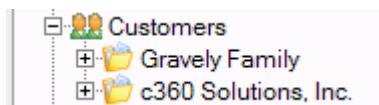


**Figure 8**: An external relationship.

Selecting 'external' will cause the blue icon to display as shown in figure 9
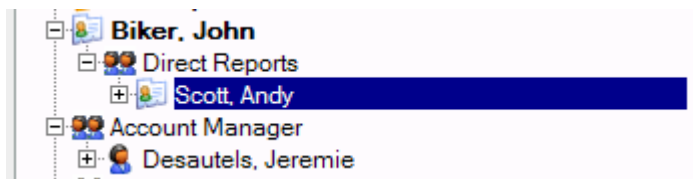


**Figure 8**: An internal relationship indicates that the relationship is with an employee of your organization.

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*Parent and Child Entity* – These picklist controls allow you to select which CRM record types the relationship may exist between.  For example, if you are creating a relationship to shows which contacts are attorneys to which organizations then select Account as the Parent Entity and Contact as the Child Entity.

*Add* – Once you have completed all the required information you may click the add button to add the relationship to the Relationship Definitions list box shown at the bottom of figure 5.

*Remove* – Clicking this will remove the selected Relationship Definition in the Relationship Definition list box.

### Creating Relationships between CRM records

Once you have defined your relationship types you are now ready to create links between CRM records.  Let's look at an example of linking contacts to show a reporting structure.  We'll consider an example where Jon Biker hires his sister Joan Biker.  Figure 9 shows that we have added Joan's record into CRM.  Now we want to create a relationship to show that Joan is a Direct Report of Jon.
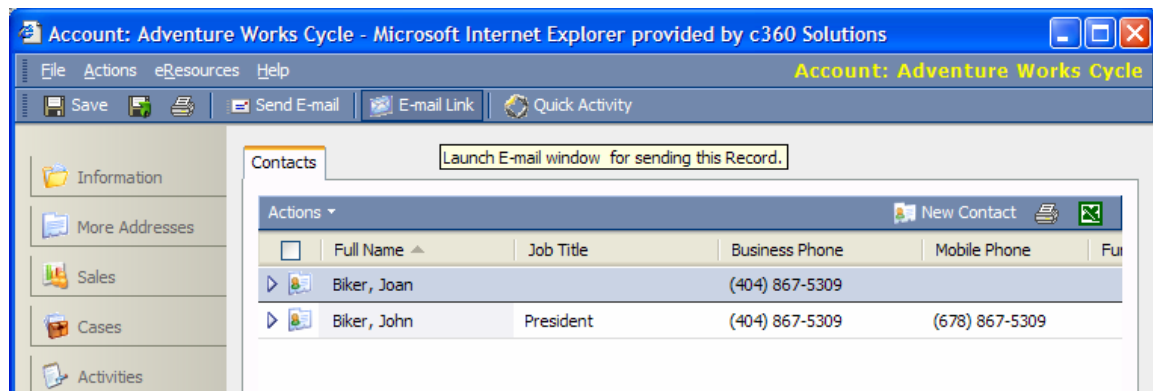


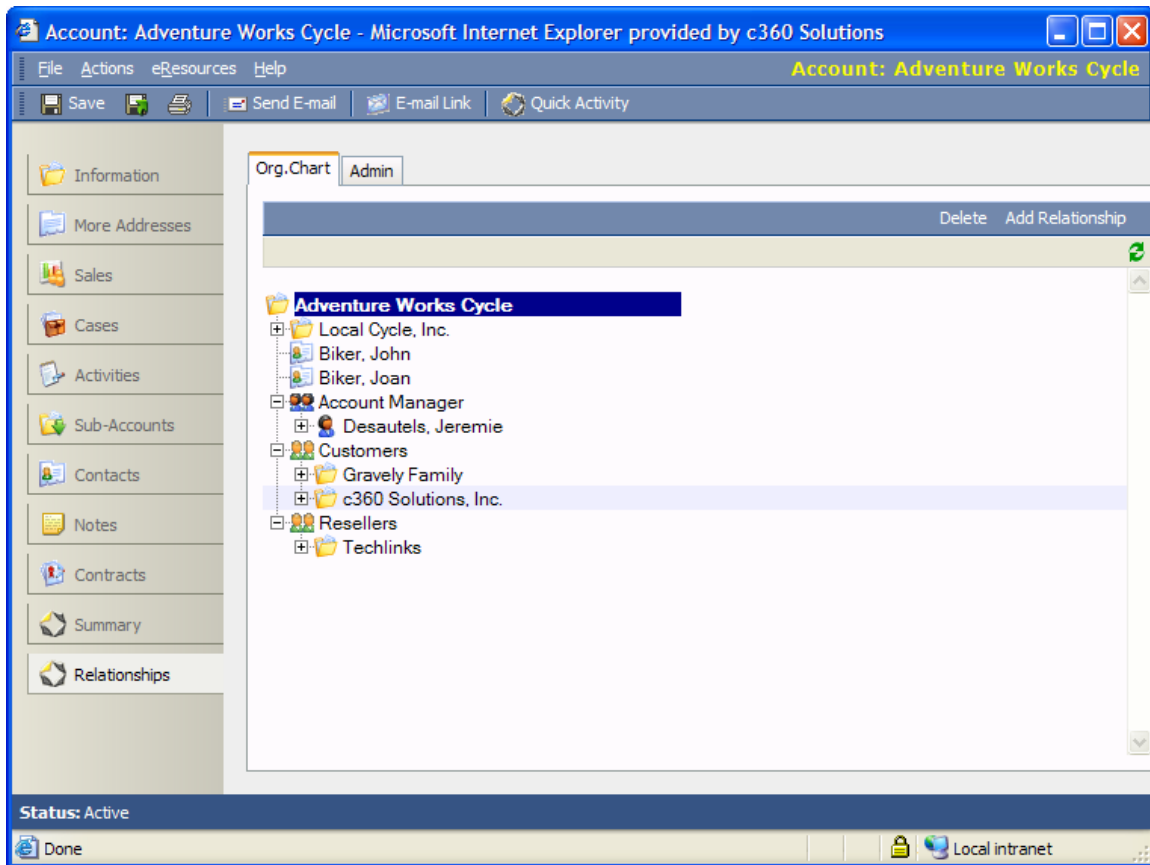**Figure 9**: Jon and Joan Biker of Adventure Works Cycle

**Figure 10**: Relationship Chart shows that both John and Joan are linked to the Adventure Works Cycle account

In the Relationship Chart view of the Account record to which my two contacts are linked I will select the Manager (see figure 11) and click the 'Add Relationship' button.
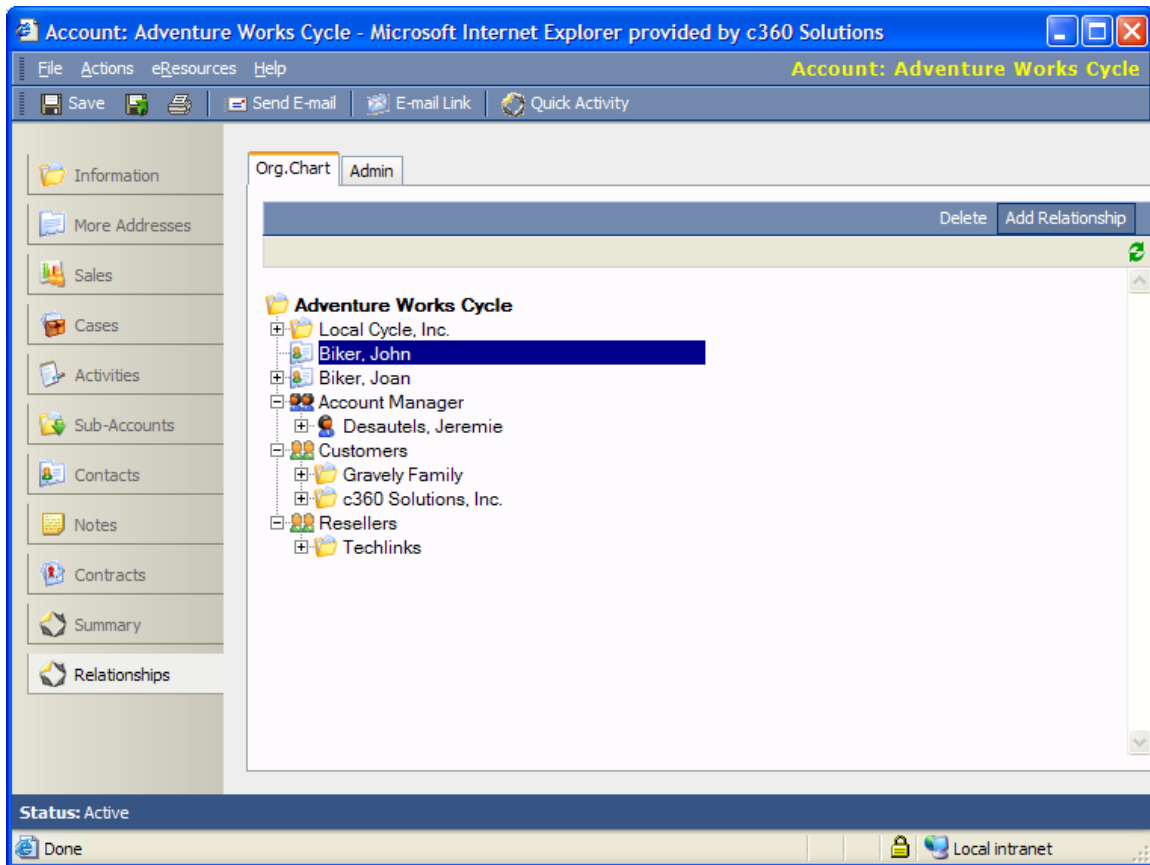
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**Figure 11**: Highlighting a contact so a relationship can be created

Having clicked the 'Add Relationship' button the Add Relationship screen appears and I complete the information and search on the contact I wish to add as a Direct Report.  Figure 12 shows the completed Add Relationship screen.
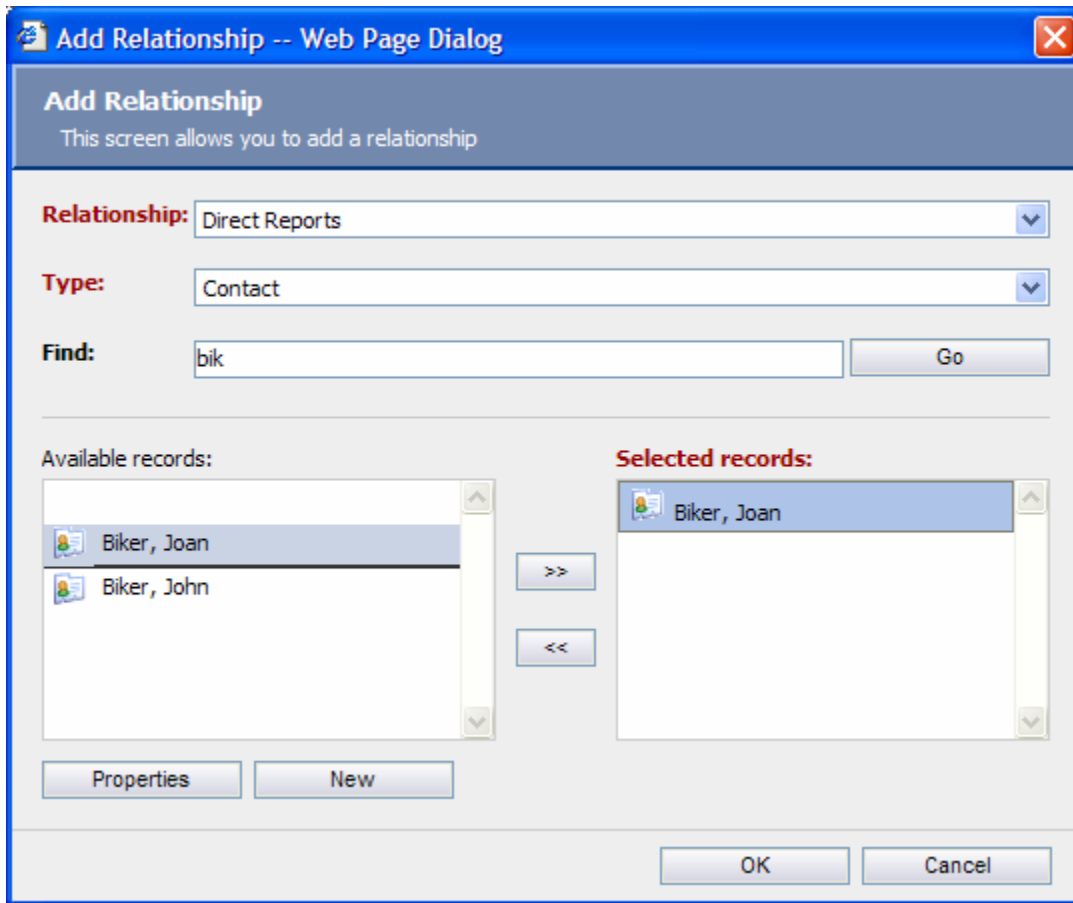
**Figure 12**: Creating a relationship between a Manager and a Direct Report.

Having completed the Add Relationship form click the OK button and the form closes and the Relationship Chart view is displayed with the new relationship between Jon and Joan. See Figure 13.
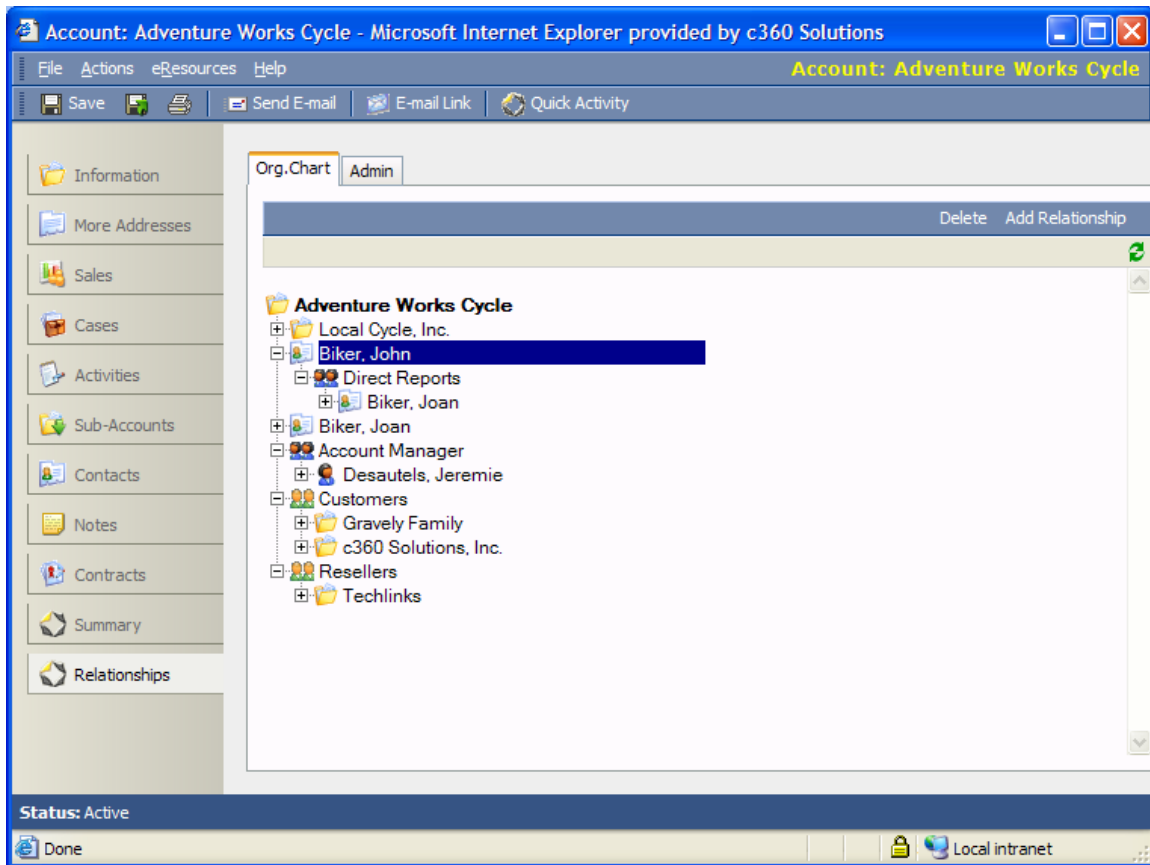
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**Figure 13**: The Relationship Chart view automatically refreshes each time a relationship is added.

## Summary

This user guide has shown the basic functions of the c360 Relationship Chart product.  Keep in mind that because you can configure Relationship Chart to create relationships between Users, Contacts, Accounts and Opportunities the possibilities for what it can display are endless.  Some examples of how this tool has been used:

- Linking Accounts, Portfolios and Advisors in a Financial Services organization
- Linking Opportunities to other opportunities in a movie studio to show relationships between the various functions in the production of a movie
- Modeling a software company's indirect reseller channel and tracking each reseller's customers