



## **c360 Relationship Charts User Guide**

Microsoft Dynamics CRM 2011 Compatible

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# INTRODUCTION

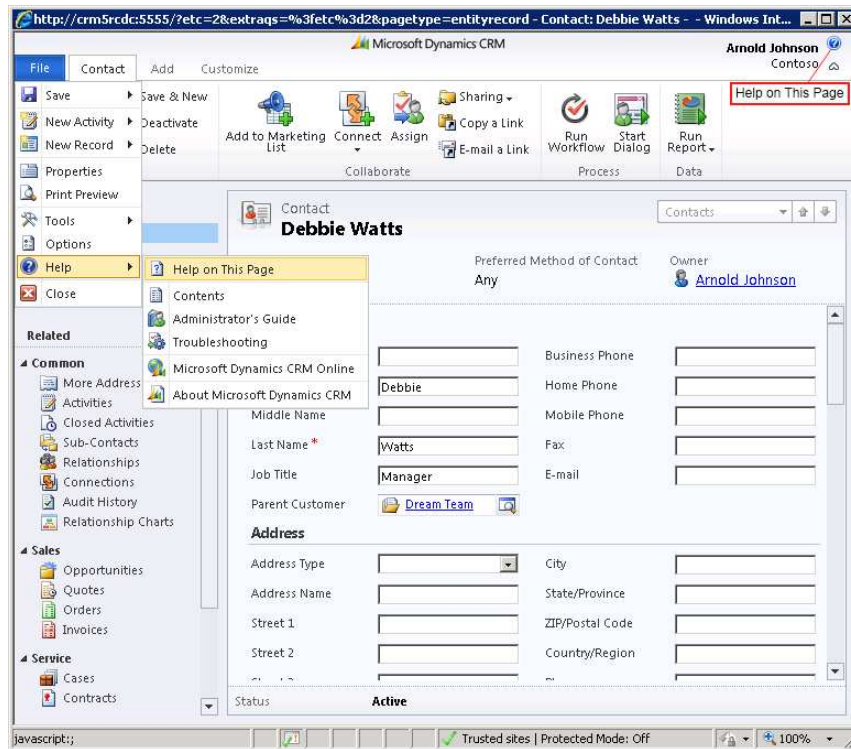
Welcome to c360 Relationship Charts for Microsoft Dynamics CRM – an easy to use, intuitive tool that is designed to transform the way you manage and leverage your relationships using Microsoft Dynamics CRM.

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.

## Further Assistance

You can find more help with Relationship Charts by selecting **Help** then **Help on This Page** within the standard Microsoft CRM Help button, below:



Further end user training is available from your CRM solutions provider.

## WHAT ARE RELATIONSHIP CHARTS?

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 client's 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:

- Job title
- Function within a Project
- Role within a buying process
- Current attitude to your organization

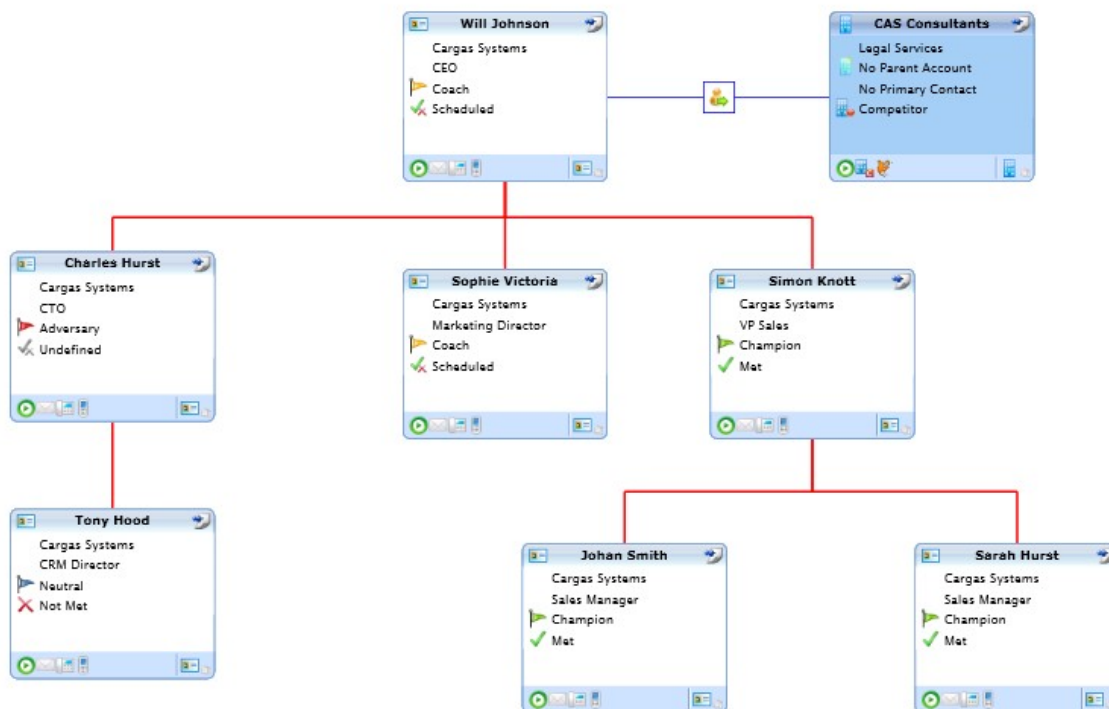
You can update Contact's Attributes, as you find out more information about the individual over time. Using your mouse, right click the Actor

box and select 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.

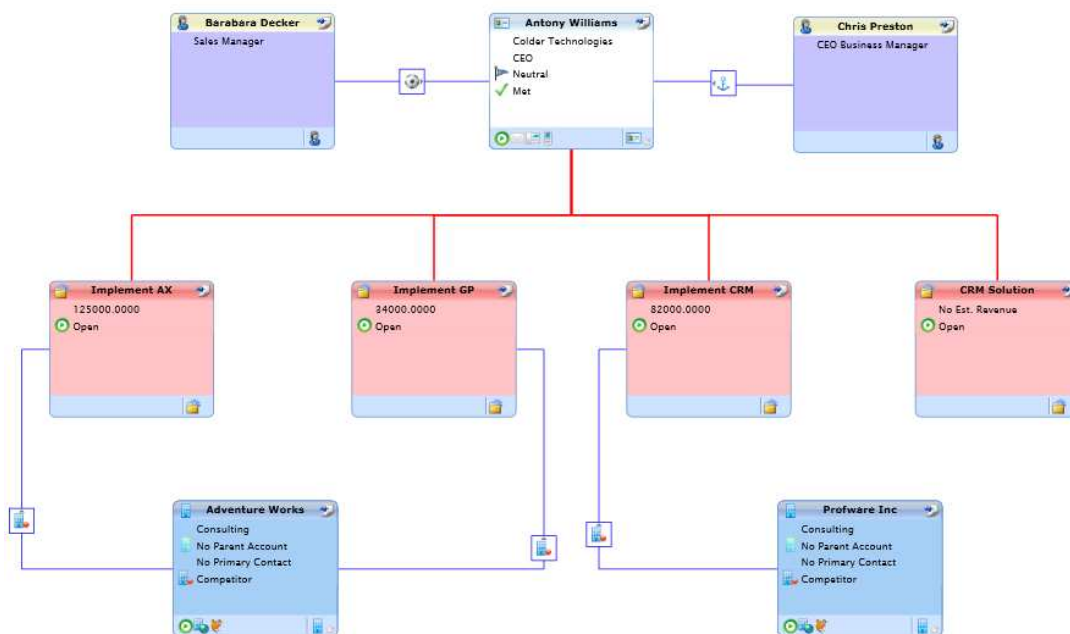
In Relationship Charts you can display any (or all) of the Contacts within an Account on a chart. You can also display Contacts that are not employees of the Account, and show how they relate to people within the Account. Additionally, other Accounts can be displayed on the chart, as an Actor, along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

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.



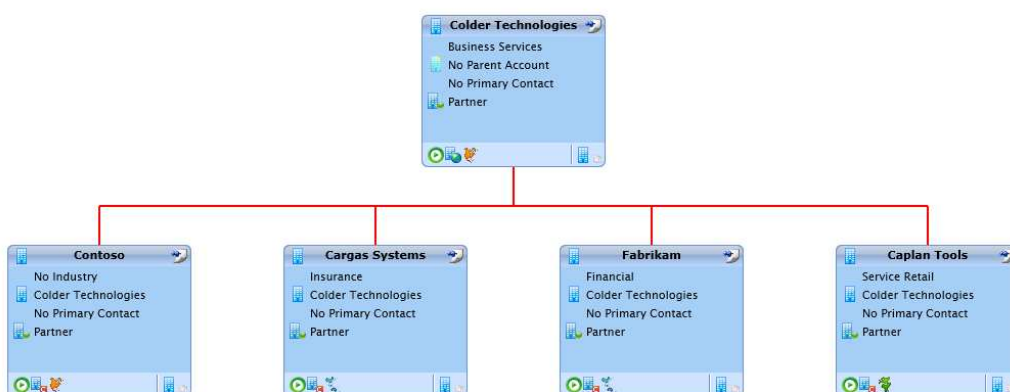
**Figure 1 Account Chart with an external legal services company**

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.



**Figure 2 Account Chart showing open opportunities & competition**

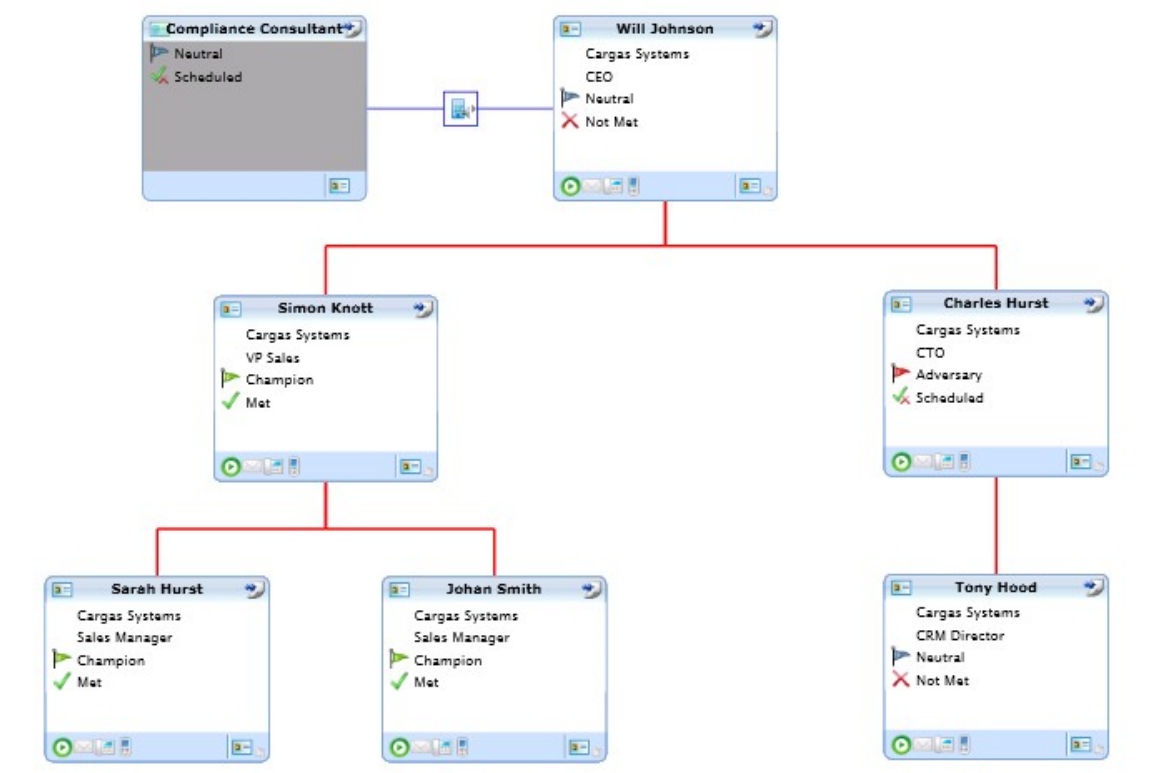
Yet another use for Account Charts is to build a graphical view of the hierarchy of a large Enterprise with sub-divisions, as illustrated below:



**Figure 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.

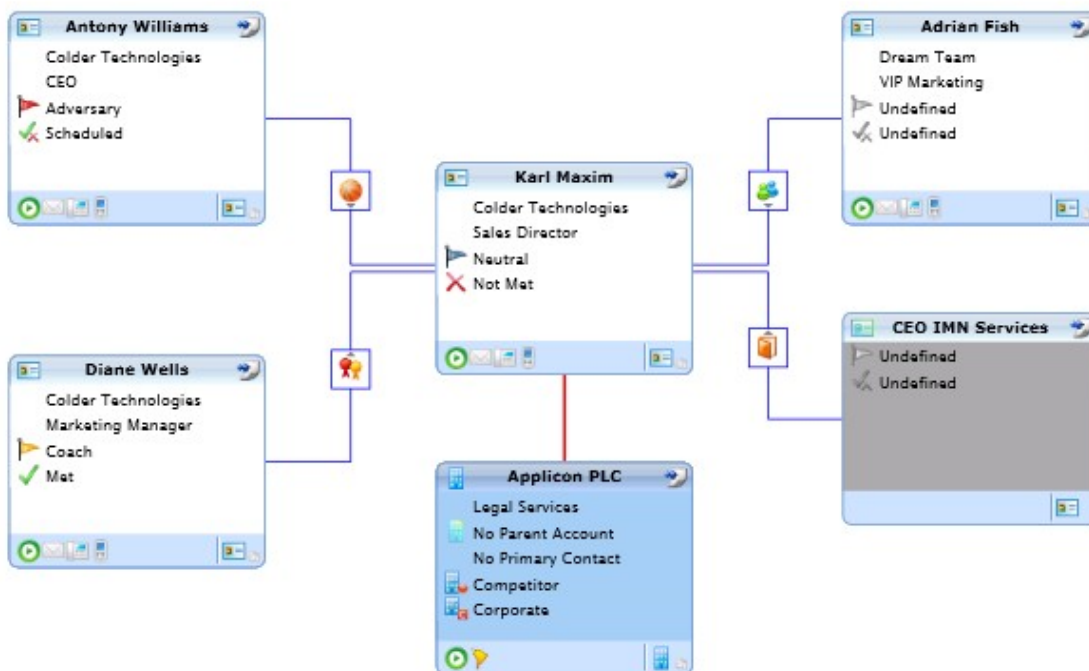


**Figure 4 Opportunity Chart with a Ghost Actor**

The chart displays whether relationships are external or internal to the Account. 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.



**Figure 5 Contact Chart showing non-hierarchical relationships**

As with all Relationship Charts, 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.

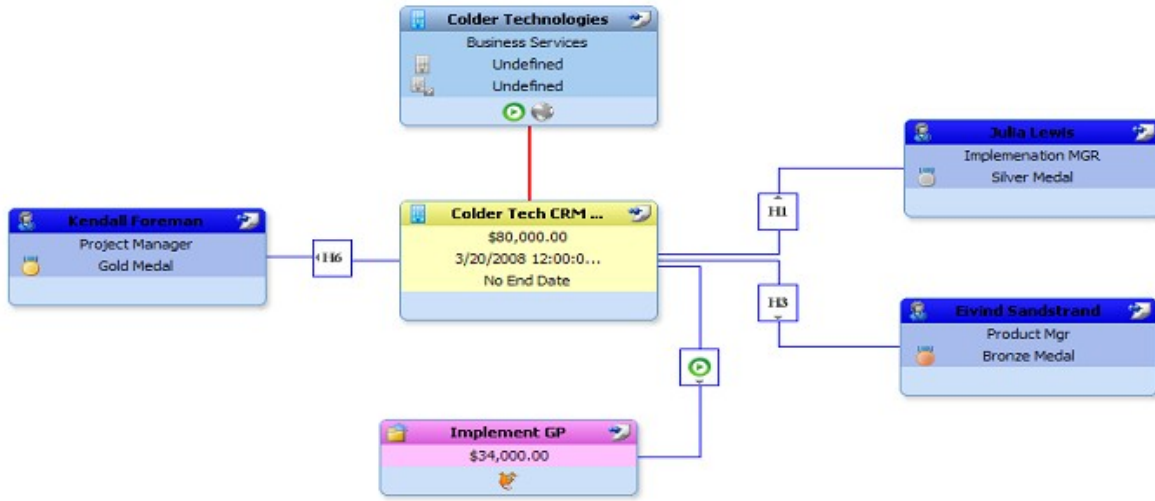
In this way, you can show the non-hierarchical relationships between people and companies. For example, show where they have common interests such as sport, professional or advisory relationships, or perhaps where a Contact has Non-Executive roles in other companies. Again, the Attributes are defined by your organization, and these may be different to those on other charts.

You can create Contact Charts for any individual within Microsoft CRM, and to open the Microsoft CRM form from within Relationship Charts, you simply double click on an Actor.



## Project Charts

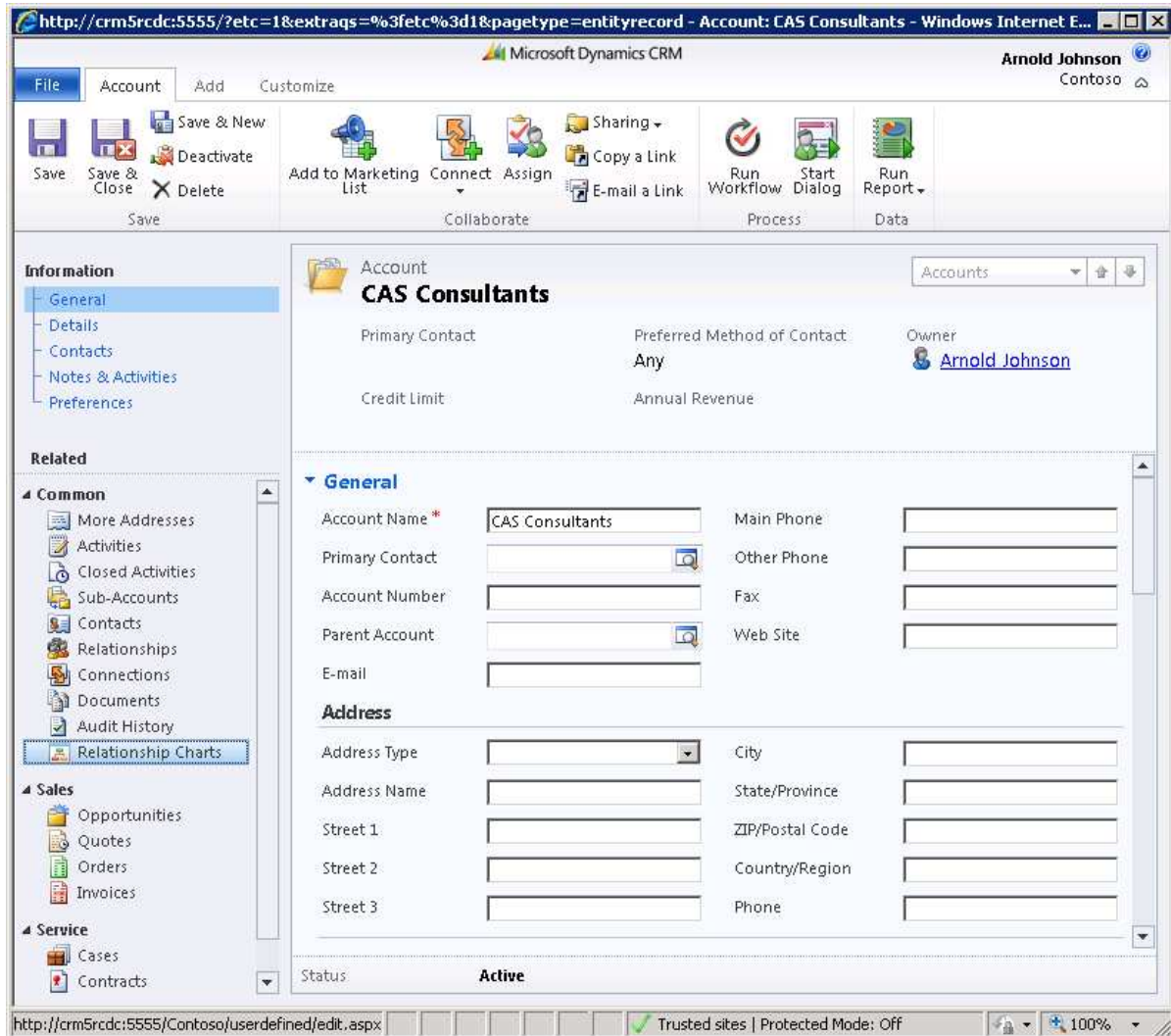
Using the example of a custom entity, a chart can be created for a project – to show the Account for which the Project is being delivered, the internal resources assigned to the project, and an opportunity that has been identified as a result.



**Figure 6 Project chart showing implementation resources & associated opportunity**

## HOW DO I ACCESS RELATIONSHIP CHARTS?

Relationship Charts can be accessed from any entity in CRM.  
For example, within the Account entity, select Relationship Charts:



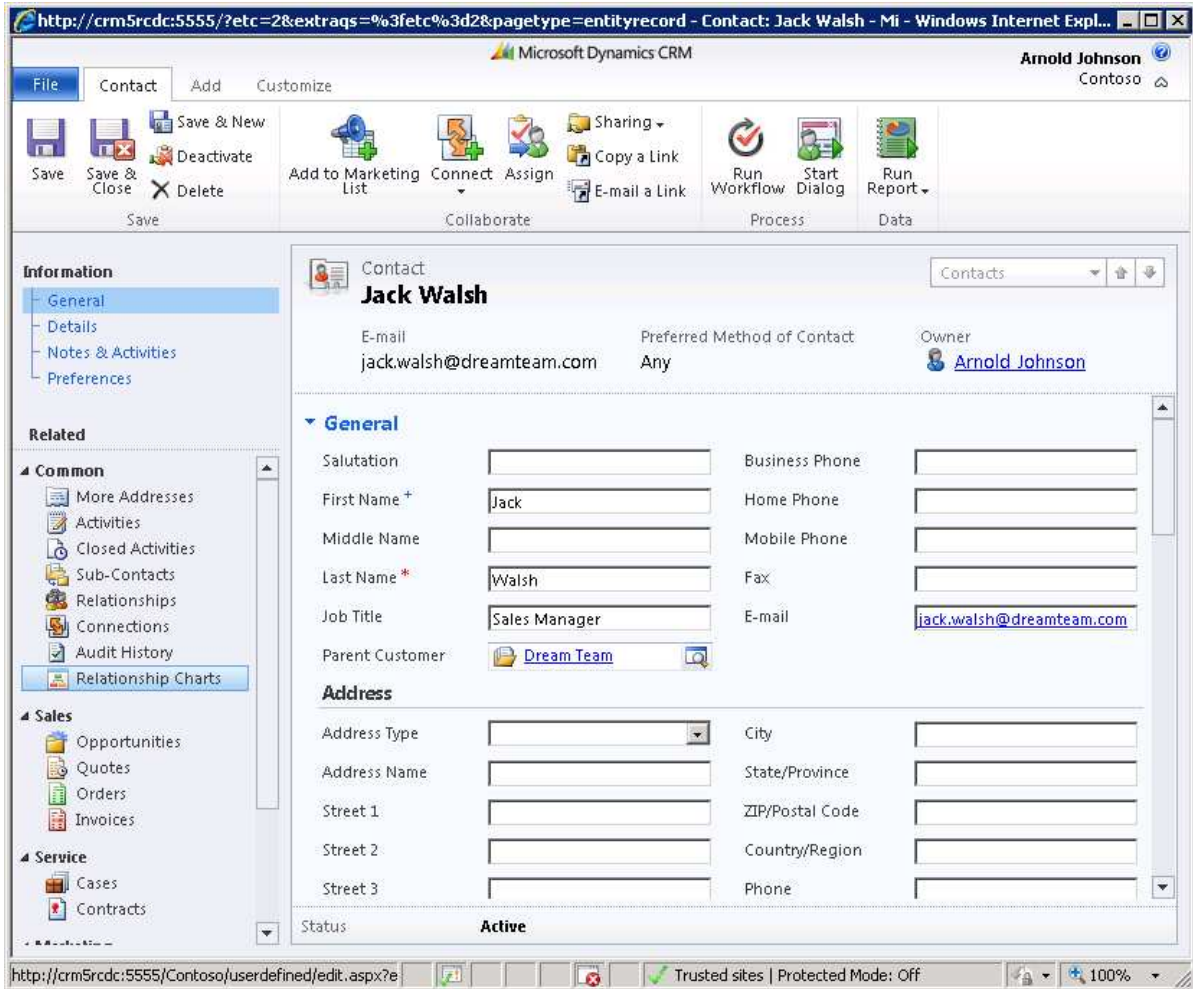
The screenshot shows the Microsoft Dynamics CRM interface for the 'CAS Consultants' account. The 'Relationship Charts' option is highlighted in the 'Related' section of the left-hand navigation pane. The main content area displays the account details, including the account name, primary contact, and address information.

**Account Information:**

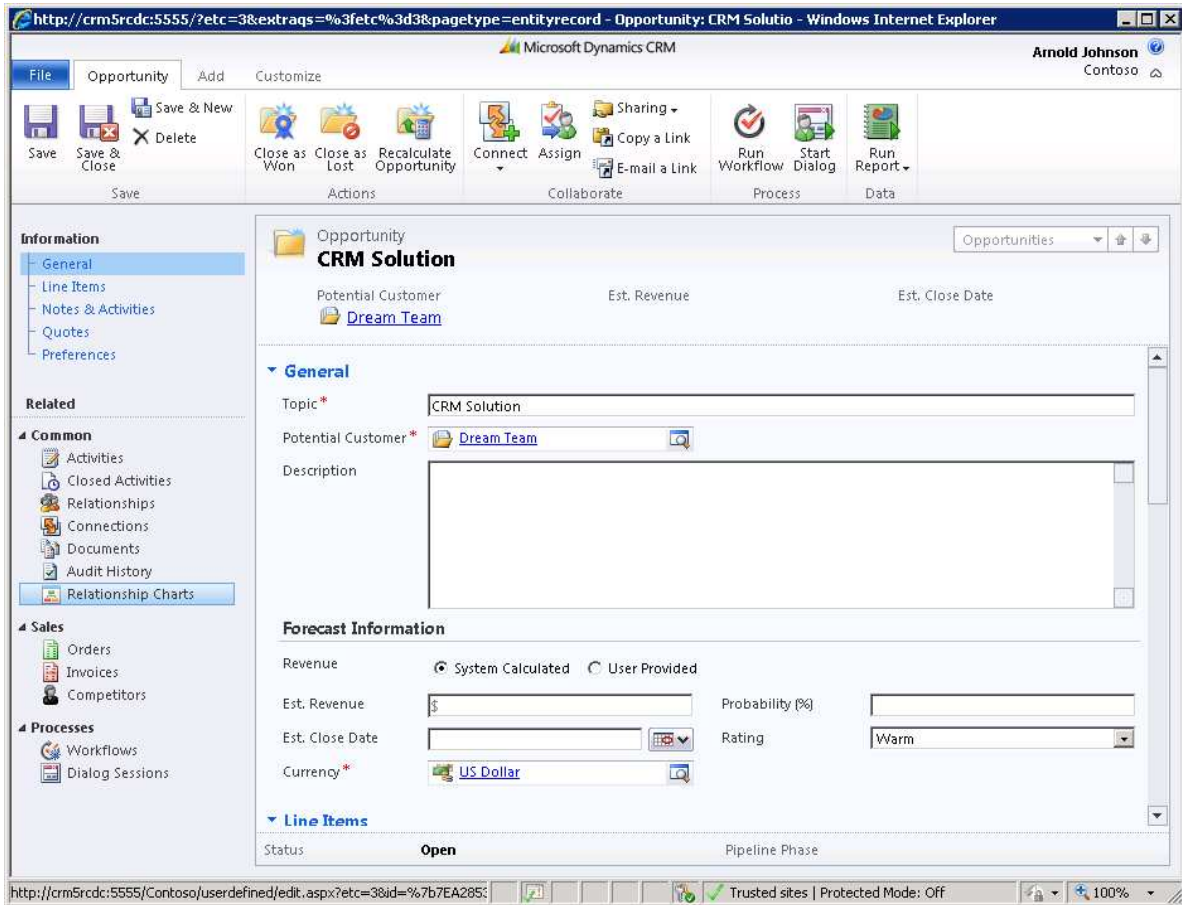
- Account Name: CAS Consultants
- Primary Contact: [Empty]
- Account Number: [Empty]
- Parent Account: [Empty]
- E-mail: [Empty]
- Address Type: [Empty]
- Address Name: [Empty]
- Street 1: [Empty]
- Street 2: [Empty]
- Street 3: [Empty]
- Main Phone: [Empty]
- Other Phone: [Empty]
- Fax: [Empty]
- Web Site: [Empty]
- City: [Empty]
- State/Province: [Empty]
- ZIP/Postal Code: [Empty]
- Country/Region: [Empty]
- Phone: [Empty]

**Status:** Active

Within the Contact entity, double click to open the relevant Contact record and select Relationship Charts:

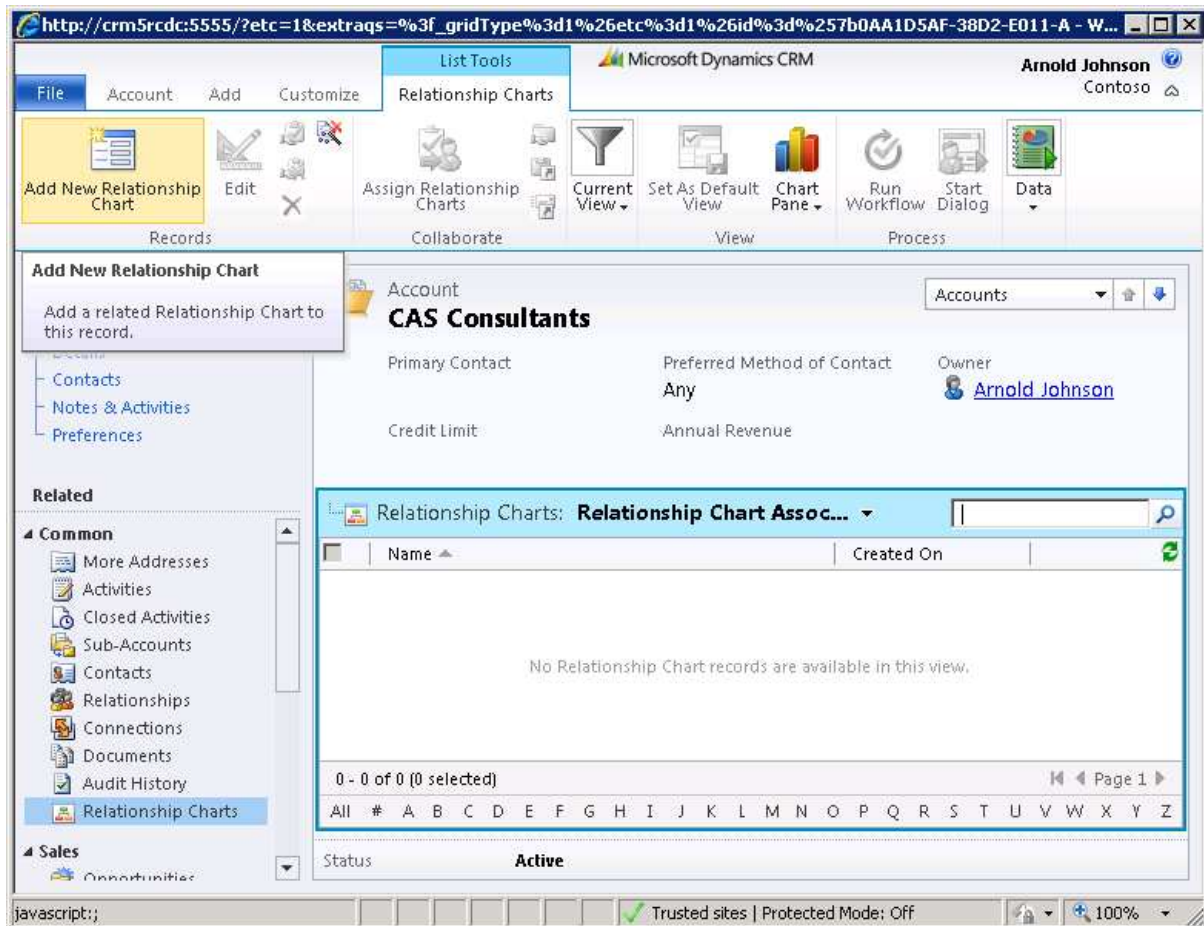


Or, within the Opportunity entity, select Relationship Charts:



## CREATING A RELATIONSHIP CHART

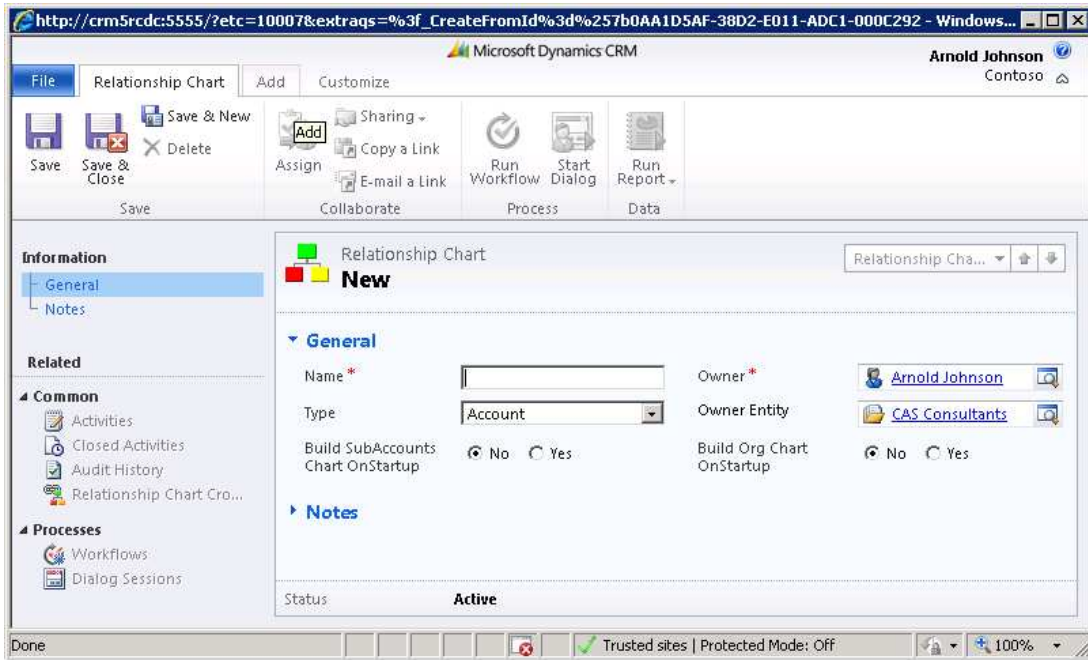
Relationship Charts can be created from within any entity, as follows:  
To create a new Chart, click the **Add New Relationship Chart** button



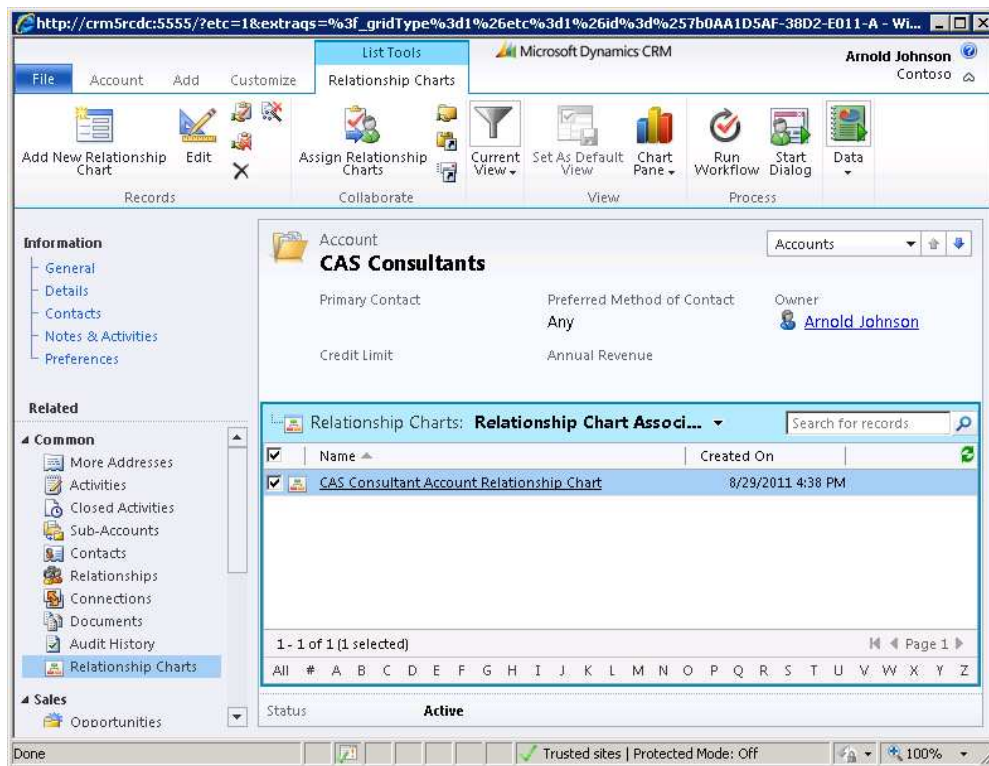
The screenshot shows the Microsoft Dynamics CRM interface. The ribbon at the top includes 'File', 'Account', 'Add', and 'Customize'. The 'Add' ribbon tab is active, and the 'Add New Relationship Chart' button is highlighted. Below the ribbon, the main window displays the 'CAS Consultants' account record. The 'Relationship Charts' list view is open, showing a table with columns 'Name' and 'Created On'. The table is empty, with the message 'No Relationship Chart records are available in this view.' displayed below the table. The status bar at the bottom indicates 'Status: Active'.

Fill in the **Name** field. If you have administration rights you can assign the chart to another user by changing the name of the owner. Click **Save** to save the changes.

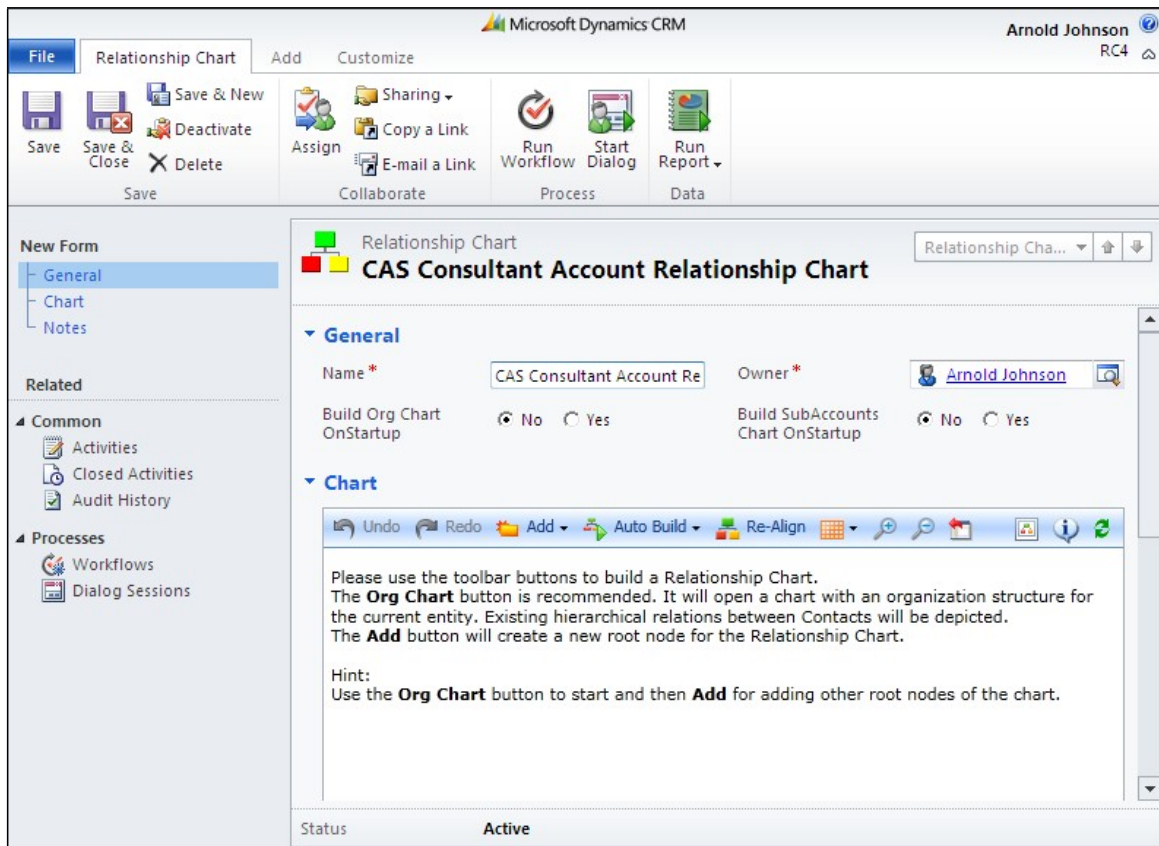








Double click on the highlighted chart to open it.




The Relationship Chart screen opens:



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 re-instate the last performed action
	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 organisation structure for the current account
 Sub Accounts		Sub Accounts	Builds a tree of accounts with a hierarchical relation
 Re-Align	Re-Align		Re-aligns all Actors in the chart
 Snap to Grid ▾	Snap to Grid		Aligns Actors to fit a uniform grid
 Auto Snap to Grid		Auto Snap to Grid	Switch on automatic Snap to Grid
	Zoom in/Zoom out		Zoom in/Zoom out the chart
	Reset		Reverts the Relationship Chart back to its original state
 Export	Export		Allows you to export your Relationship Chart as a Picture
 Legend	Legend		List of Icons and their meanings
	Refresh		Refresh the chart



## BUILDING A RELATIONSHIP CHART

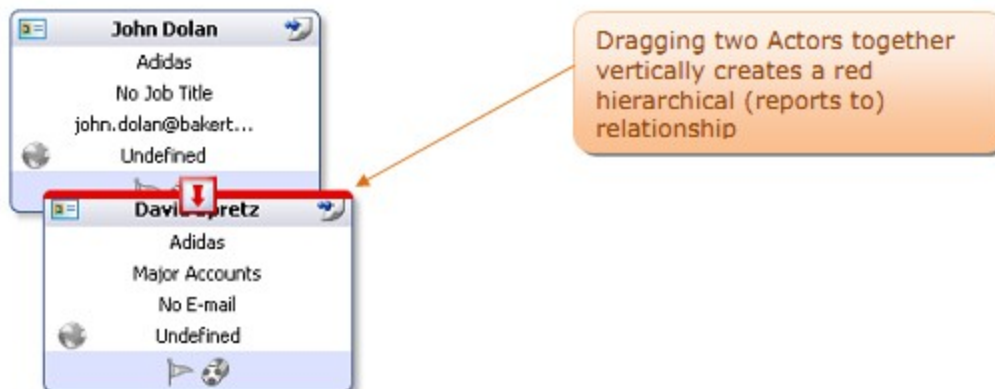
The easiest way to create a new chart is to use the Org Chart button. Having created a new chart using the Org Chart button, this section shows you how to manually add Actors and their relationships, as well as set Attributes.

### Adding Relationships

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

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

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



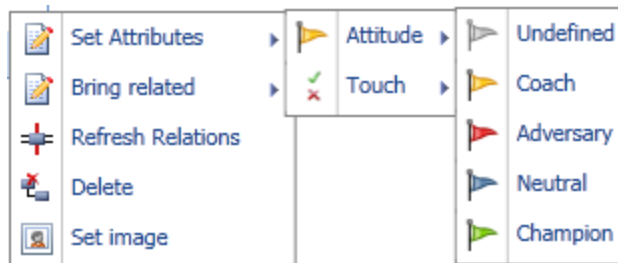


Dragging two Actors together horizontally creates a blue (non-hierarchical) relationship

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.

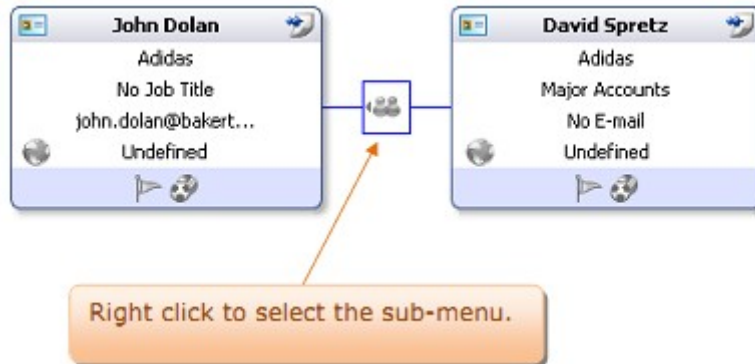


From the **Set Attributes** option of the sub-menu, you can set any Attribute of your Actor in one click. Changing the Attributes value will cause the icons and/or text of the Actor to change in appearance.

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 relationship.



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 not be saved until you use the Microsoft CRM 'Save', 'Save and Close' or 'Save and New' buttons.

## 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 David Edmonson. Fill in the Attitude Field and the Touch Field to set Attributes in the Contact Ghost.

### Add Contact Ghost

Name:	<input type="text" value="David Edmonson"/>	
Attribute	Value	
Attitude	<input type="text" value="&lt;undefined&gt;"/>	
Touch	<input type="text" value="&lt;undefined&gt;"/>	
<input type="button" value="Help"/> <input type="button" value="Add Ghost"/> <input type="button" value="Cancel"/>		

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.

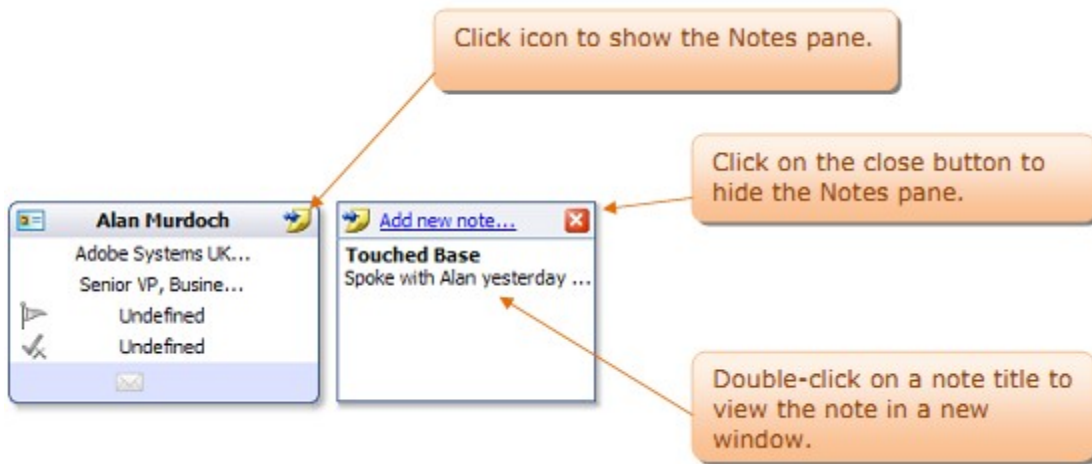
### Adding Notes

c360 Relationship Charts allows you to attach freeform Notes against Relationship Charts Actors.

Notes are stored against the Relationship Charts entity, so you can search using Advanced Find or any reporting tools for Notes stored in Relationship Charts.

When an Actor has Notes attached to it, the icon in the top-right hand corner will change from  to .

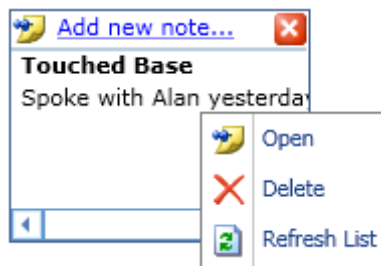
To view any available Notes on an Actor, left click on this icon, and a pane will appear next to the Actor:



To open a note for editing, double click on the note title; a new window will appear with the note information in it. The note title and body will be prefixed with the Actor type and Name (e.g. [Contact Alan Murdoch]); this is to allow Relationship Charts to recognize which Actor a note is stored against.

To add a new note, click the **Add new note** link at the top of the pane; this will open a new window to allow you to enter your note. You can attach a file to this note by using the controls at the bottom of the window.

If you left click on a Note title in the Notes pane, you will be presented with a sub-menu with a number of different options:

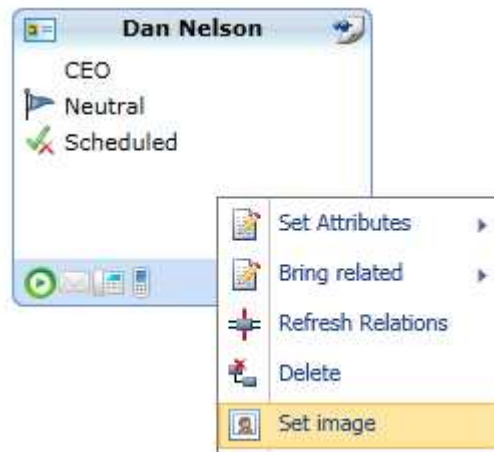


Clicking on the **Open** option will open the note for editing, clicking **Delete** will delete the note from the Actor on the chart as well as the note attached to the Relationship Chart itself.

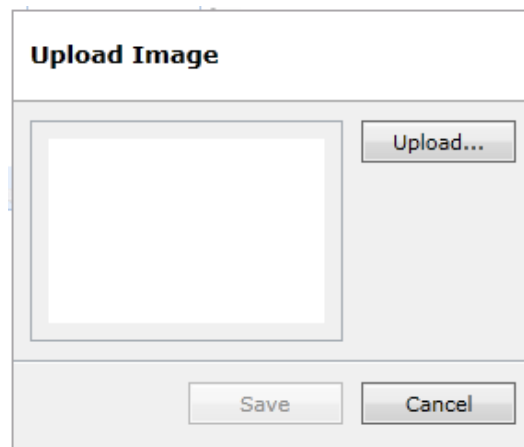
Clicking **Refresh List** will display any notes added to the Contact's Relationship Charts field from within CRM.

## 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.



Click **Upload** and select the picture

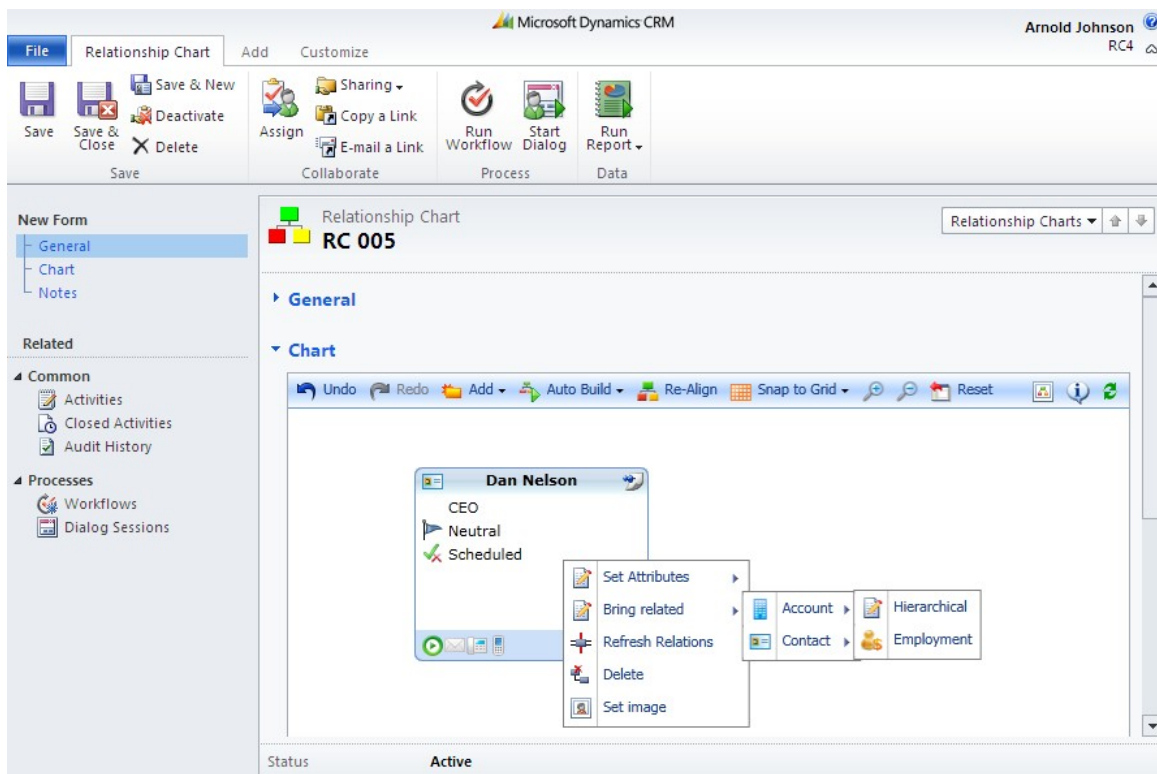


Click **Save** and you will see:



## BRING RELATED

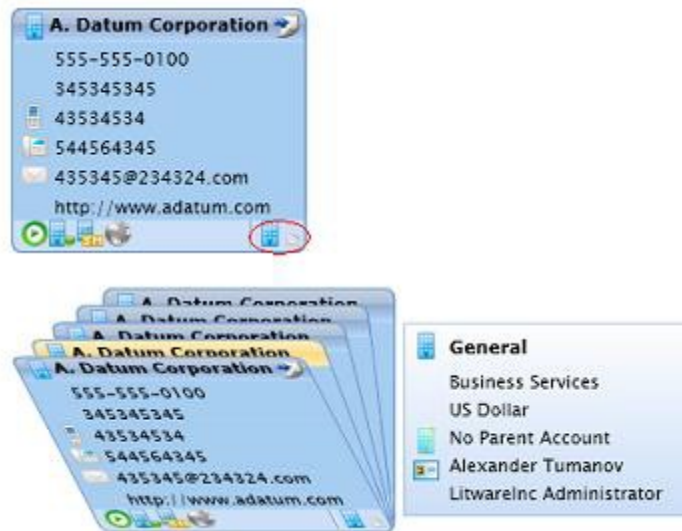
The Bring Related functionality helps you add actors to the chart when relationships between actors are stored in CRM. For example, if you want to add contacts that work with the selected company, right click on the actor (company), select Bring Related in the context menu, then choose the type of actors that you want to be brought to the chart (in our example Account), then select their relationship type (in our example Hierarchical).



Relationship Charts automatically brings the contacts that have hierarchical relationships with that company. Bring Related 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 icon in the bottom right footer area and then click on group tab – the group order will change.





## 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.