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MAKING CRM MAKE SENSE

Dynamics 365 CRM Contact Referral Association

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Author: Adam Travers
Contact: 0845 1368449

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empath-e is registered in England and Wales No: 04745733. Vat No. GB 901 2597 45

Registered Office: Unit 1, Freemantle Business Centre, Millbrook Road East, Southampton, SO15 1JR

STEPS

- (1) Create a new Contact Referral Entity - Ensure you select the 'Allow Quick Create' tickbox on the new Entity properties

The screenshot shows the 'Entity Definition' form in Dynamics 365 CRM. The form is divided into several sections:

- Entity Definition:** Fields for 'Display Name *' (Contact Referral), 'Plural Name *' (Contact Referrals), 'Name *' (empath_e_contactreferral), 'Primary Image', 'Color', and 'Description'.
- Areas that display this entity:** Checkboxes for 'Sales' (checked), 'Training', 'Service', and another unchecked checkbox.
- Process:** A checkbox for 'Business process flows (fields will be created) †'.
- Communication & Collaboration:** A list of checkboxes including 'Feedback †', 'Notes (includes attachments) †', 'Activities †', 'Connections †', 'Sending email (If an email field does not exist, one will be created) †', 'Mail merge' (checked), 'Document management', 'Access Teams', 'Queues †', 'Automatically move records to the owner's default queue when a record is created or assigned.', 'Knowledge Management', and 'Enable for SLA (Fields will be created)†'.
- Data Services:** Checkboxes for 'Allow quick create' (checked, with a red arrow pointing to it), 'Duplicate detection' (checked), and 'Editing'.



(2) Create a new field called using the Data Type (Lookup) to the Contact Entity

The screenshot shows the 'Field' configuration page in Dynamics 365 CRM. The page title is 'Field: Contact Referral Lookup of Contact Referral - Work - Microsoft Edge'. The URL is 'https://orgdcbe326e.crm11.dynamics.com/tools/systemcustomization/attributes/manageAttribute.aspx?attributeld=%7b5F5CCAF7-2E...'. The page is part of the 'Power Apps' environment and is working on the solution 'Contact Referrals'.

The configuration is for a field named 'Contact Referral Lookup of Contact Referral'. The 'General' tab is active, showing the following settings:

- Schema:**
 - Display Name*: Contact Referral Lookup
 - Name*: empaththe_contactreferrallookup
 - Field Requirement*: Optional
 - Searchable: Yes
 - Field Security: Enable Disable
 - Auditing*: Enable Disable
 - Description: (Empty text box)
- Other Settings:**
 - Appears in global filter in interactive experience:
 - Sortable in interactive experience dashboard:
 - For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics 365 SDK](#)
- Type:**
 - Data Type*: Lookup
 - Target Record Type*: Contact
 - Relationship Name*: empaththe_contact_empathe_contactreferral_Conta
 - Edit relationship detail(advanced): (Link)



(3) Create Contact Referral Entity View - Remove all existing columns and add the new Contact Lookup that you created above

The screenshot shows the Dynamics 365 interface for editing a view. On the left is the navigation pane for 'Contact Referral' with 'Views' selected. The main area shows a table of active views:

Name	Type	State	Customizable...	Description
Active Contact Referrals	Default Public View	Unmanaged	True	
All Contact Referrals	Public View	Unmanaged	True	

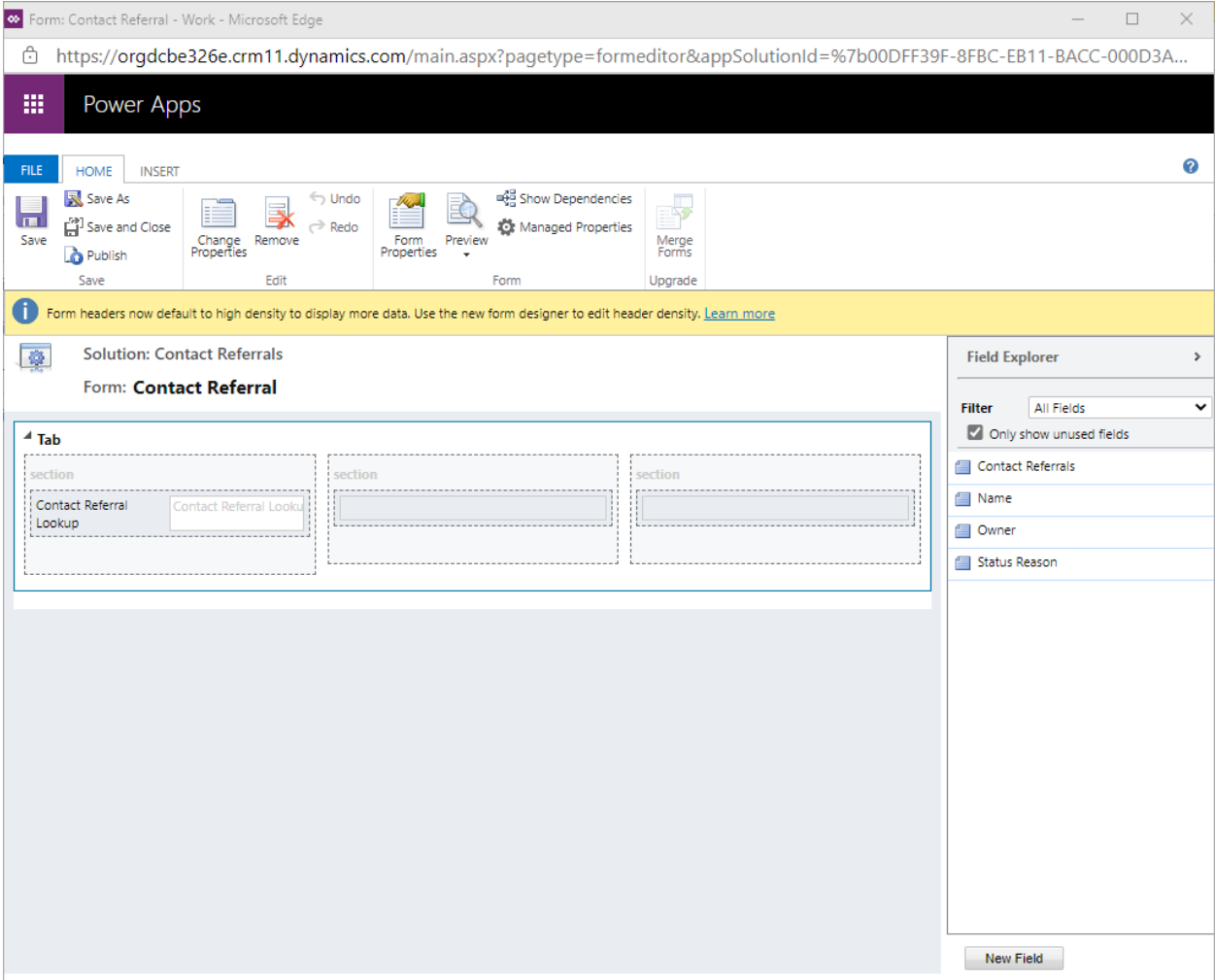
An 'Add Columns' dialog is open for the 'All Contact Referrals' view. It shows a list of columns to be added:

Display Name	Name	Type	
<input type="checkbox"/>	(Deprecated) Process Stage	stageid	Unique Identifier
<input type="checkbox"/>	Address 1	address1_composite	Multiple Lines of Text
<input type="checkbox"/>	Address 1: Address Type	address1_adresstypecode	Option Set
<input type="checkbox"/>	Address 1: City	address1_city	Single Line of Text
<input type="checkbox"/>	Address 1: Country/Region	address1_country	Single Line of Text
<input type="checkbox"/>	Address 1: County	address1_county	Single Line of Text
<input type="checkbox"/>	Address 1: Fax	address1_fax	Single Line of Text
<input type="checkbox"/>	Address 1: Freight Terms	address1_freighttermscode	Option Set

The 'Record Type' dropdown is set to 'Contact Referral Lookup (Contact)', indicated by a red arrow. A 'Try New Experience' note is visible at the bottom of the dialog.



(4) Create Contact Referral Quick View Create Form - Add the Contact Lookup field into the Form

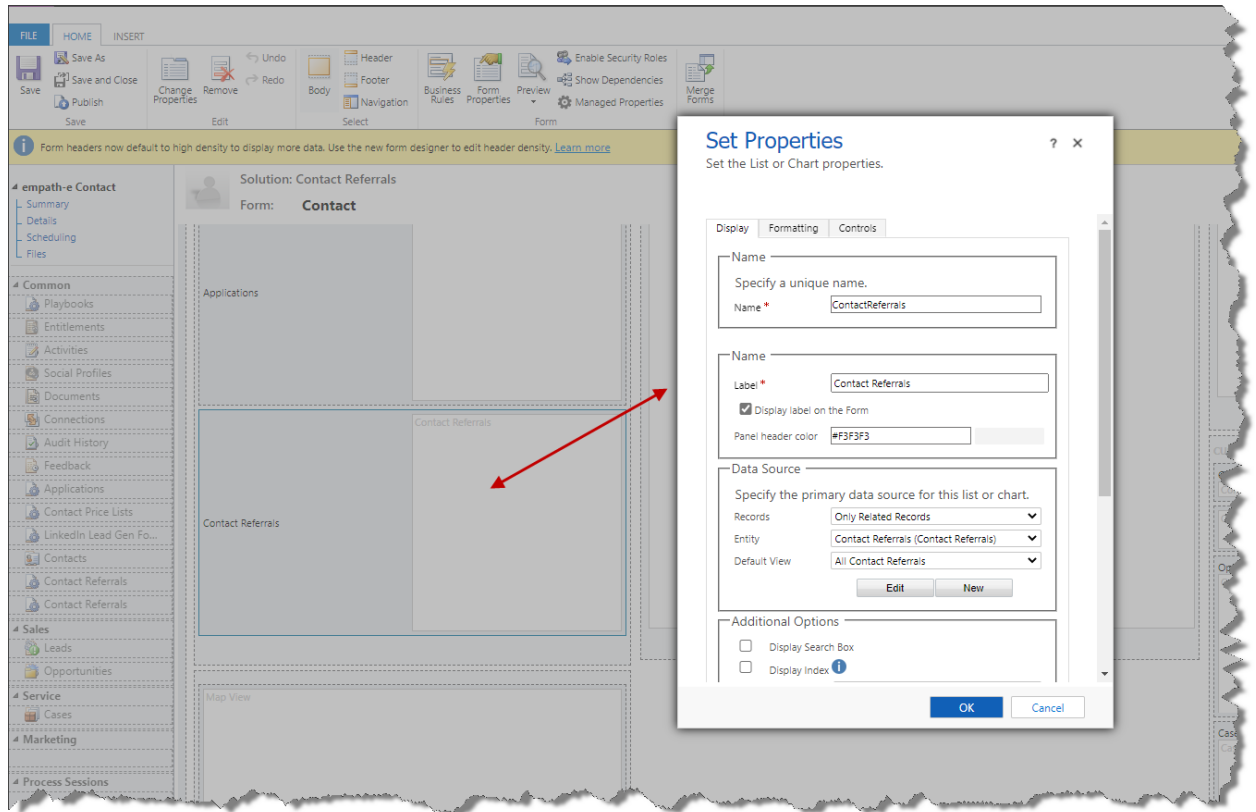


(5) On the Contact Entity create a 1 to Many join to the Contact Referral table

The screenshot shows the 'Manage Relationships' interface in Dynamics 365 CRM. The browser address bar shows the URL: <https://orgdcbe326e.crm11.dynamics.com/tools/systemcustomization/relationships/manageRelationships...>. The page title is 'Relationship: Contact to Contact Referral - Work - Microsoft Edge'. The interface includes a 'Power Apps' header and a navigation pane on the left with 'Common', 'Information', and 'Mappings' sections. The main content area is titled 'Relationship' and 'Working on solution: Contact Referrals'. The 'General' tab is active, showing the 'Relationship Definition' section with the following fields: Primary Entity* (Contact), Related Entity* (Contact Referral), Name* (empathe_contact_empathe_contactreferral_ContactReferralLookup), Searchable (Yes), Hierarchical (No), Lookup Field section with Display Name* (Contact Referral Lookup), Name* (empathe_contactreferra), Field Requirement* (Optional), and Description. Below this is the 'Navigation Pane Item for Primary Entity' section with Display Option* (Use Plural Name), Custom Label* (empty), Display Area* (Details), and Display Order* (10,000). The 'Relationship Behavior' section includes Type of Behavior* (Referential), Assign* (Cascade None), Reparent* (Cascade None), Share* (Cascade None), Delete* (Remove Link), Unshare* (Cascade None), Merge* (Cascade All), and Rollup View* (Cascade None).



(6) Open your Contact Main View form - Insert your Contact Referral Sub Grid



Publish All



The screenshot displays the Dynamics 365 CRM interface for a contact named Adam Travers. The left-hand navigation pane includes sections for 'My Work', 'Customers', 'Sales', and 'Collateral'. The 'Sales' section is expanded, showing 'Leads', 'Opportunities', and 'Competitors'. The main content area shows the contact's details, including address and applications. A table titled 'Contact Referrals' is visible, with a red arrow pointing to the 'Full Name (Contact Referral Lookup)' column. The table contains two entries: 'James Curtis' and 'Maria Campbell (sample)'. A context menu is open over the table, listing options such as 'New Contact Referral', 'Add Existing Contact Referral', 'Refresh', 'Flow', 'Run Report', 'Excel Templates', 'Export Contact Referrals', and 'See associated records'. A tooltip for 'Add Existing Contact Referral' is also visible, stating 'Add a related Contact Referral to this record.' The top of the interface shows the 'Dynamics 365' logo, 'Sales Hub' text, and a 'SANDBOX' environment indicator. The top navigation bar includes buttons for 'Save', 'Save & Close', 'New', 'Deactivate', 'Connect', 'Add to Marketing List', 'Assign', 'Email a Link', 'Delete', and 'Refresh'.

