Dynamics 365 CRM
Contact Referral Association

Date: 24/05/2021
Version: 1.0
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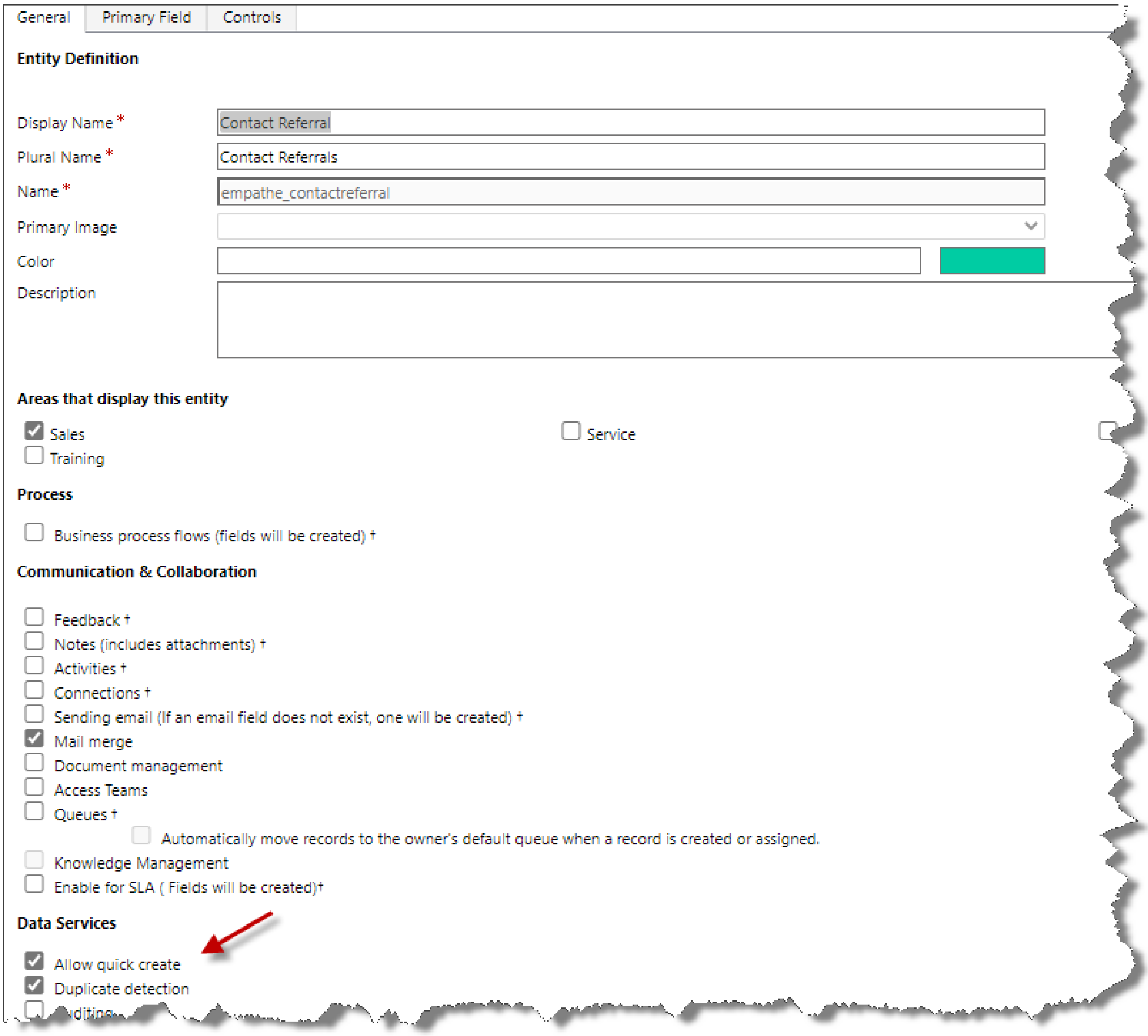
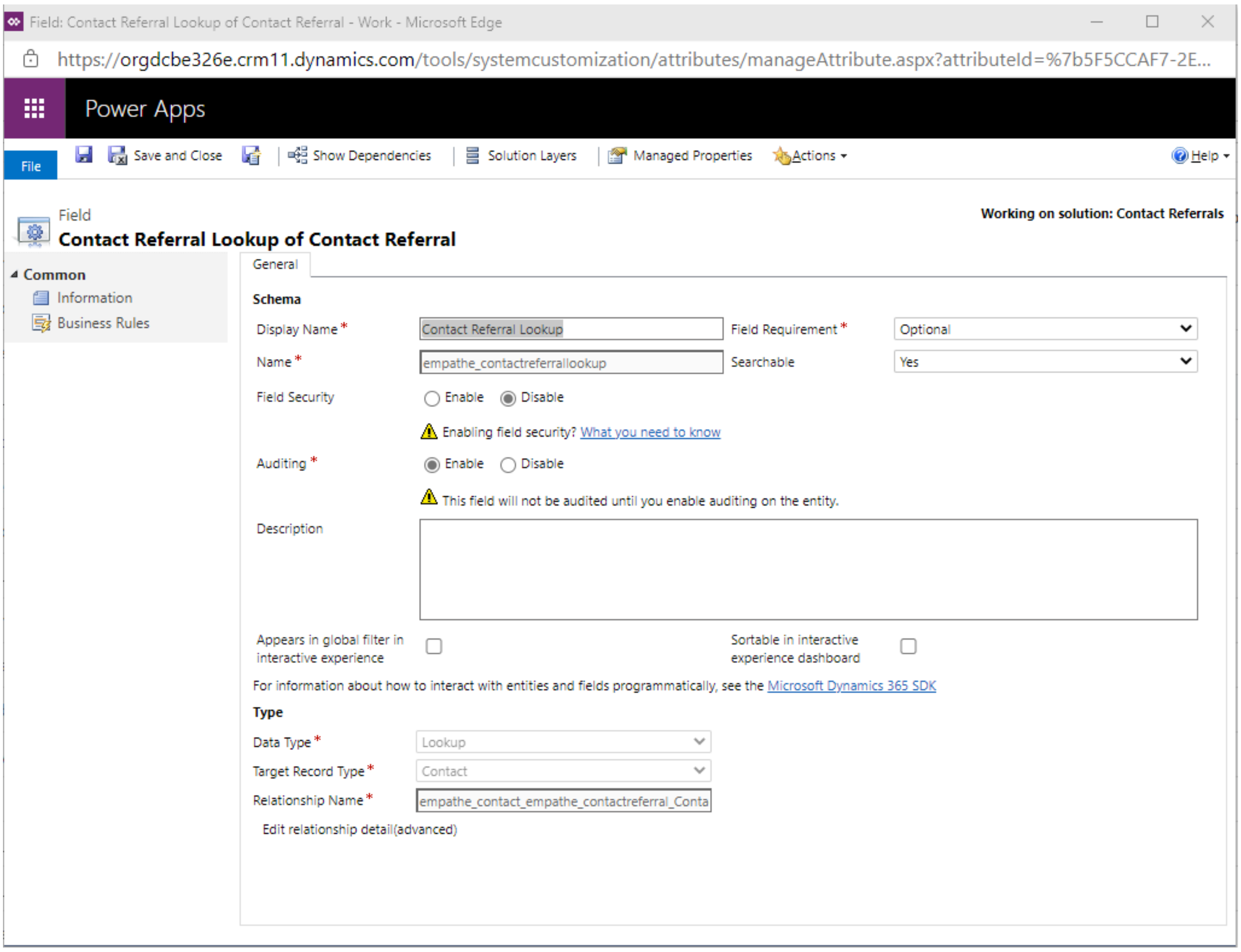
STEPS

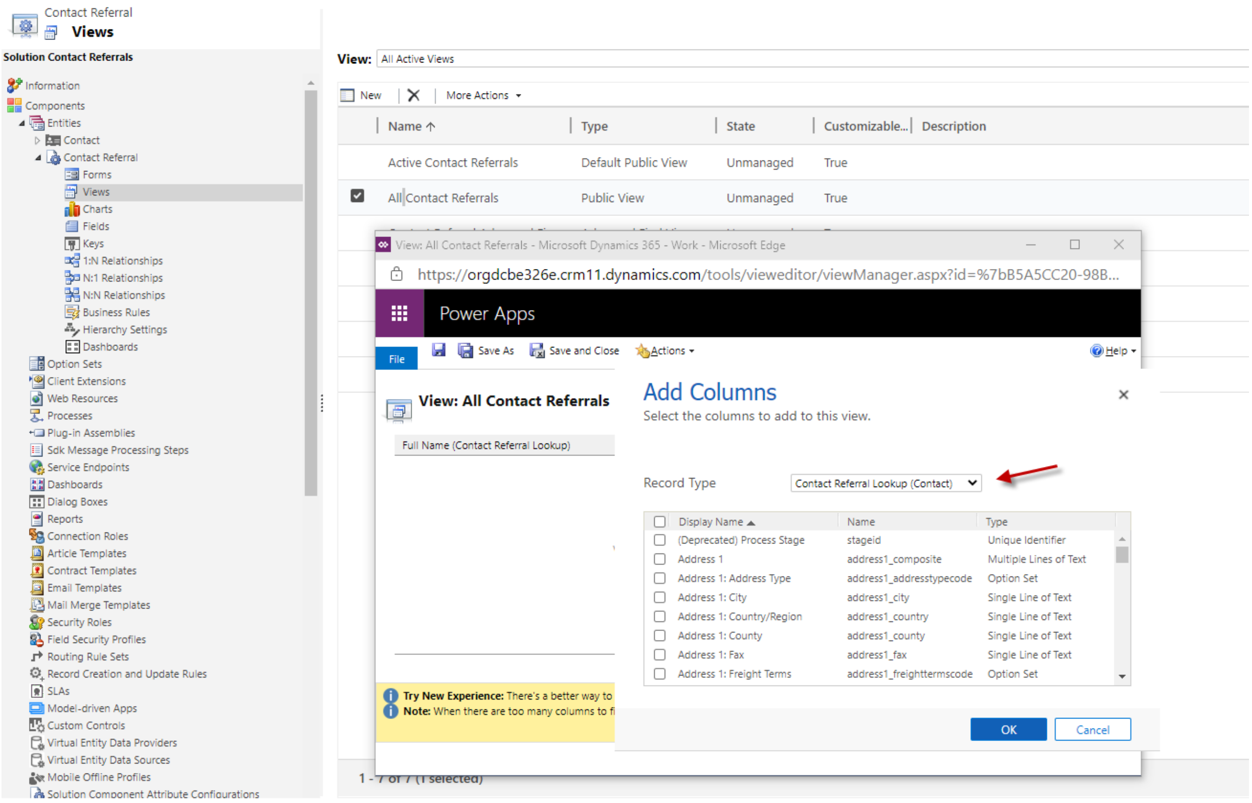
(1) Create a new Contact Referral Entity - Enure you select the 'Allow Quick Create' tickbox on the new Entity properties



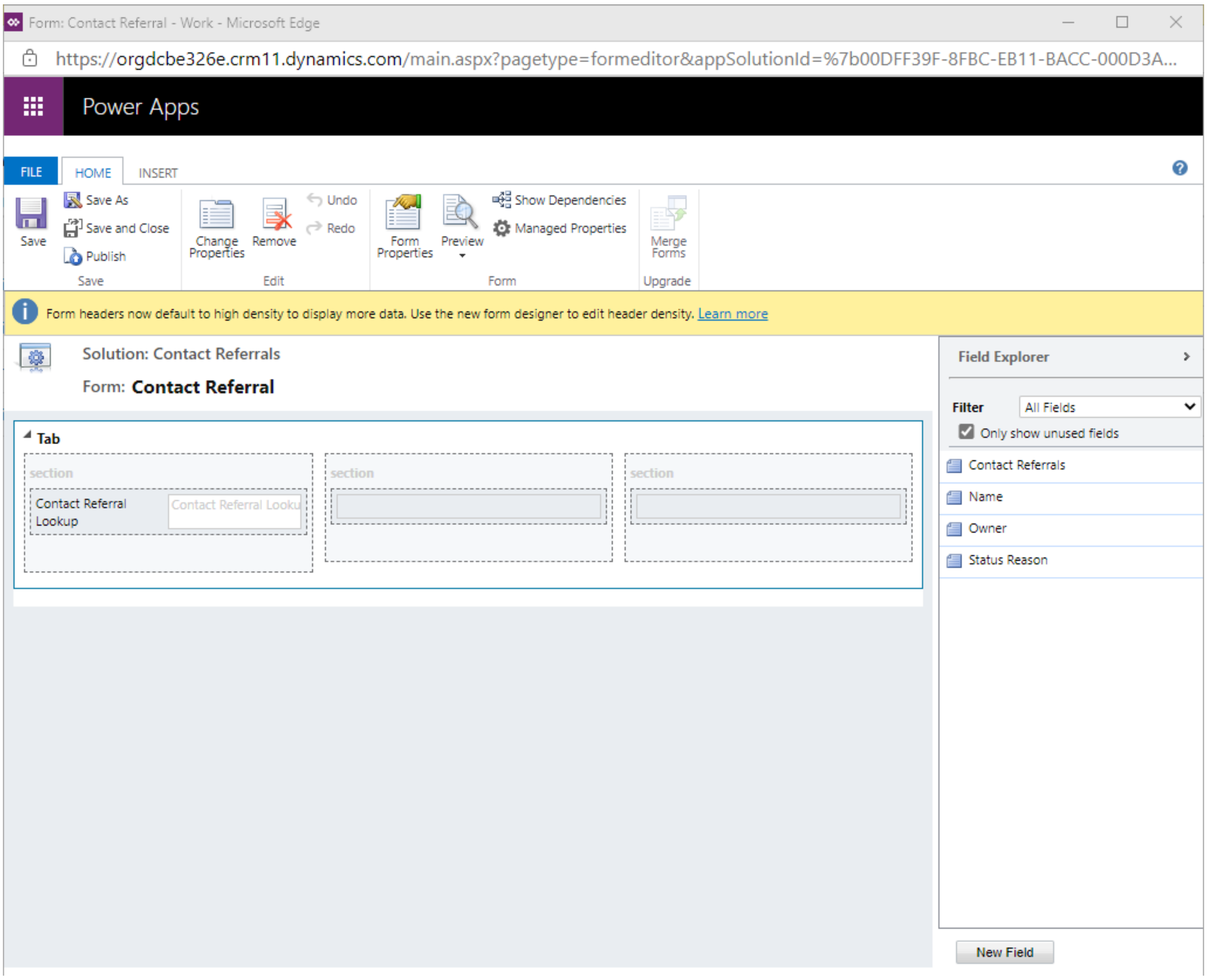
(2) Create a new field called using the Data Type (Lookup) to the Contact Entity



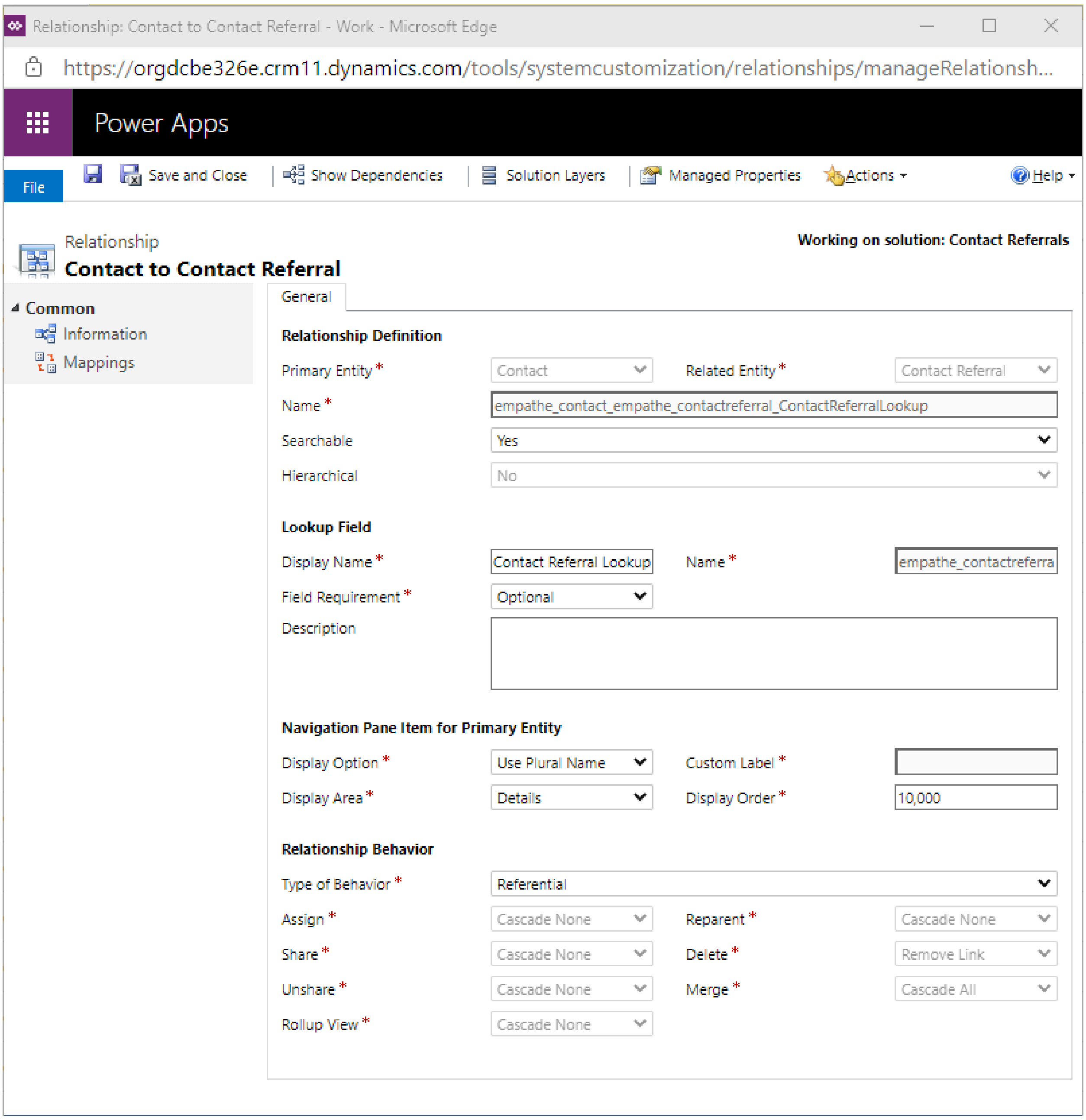
(3) Create Contact Referral Entity View - Remove all existing columns and add the new Contact Lookup that you created above



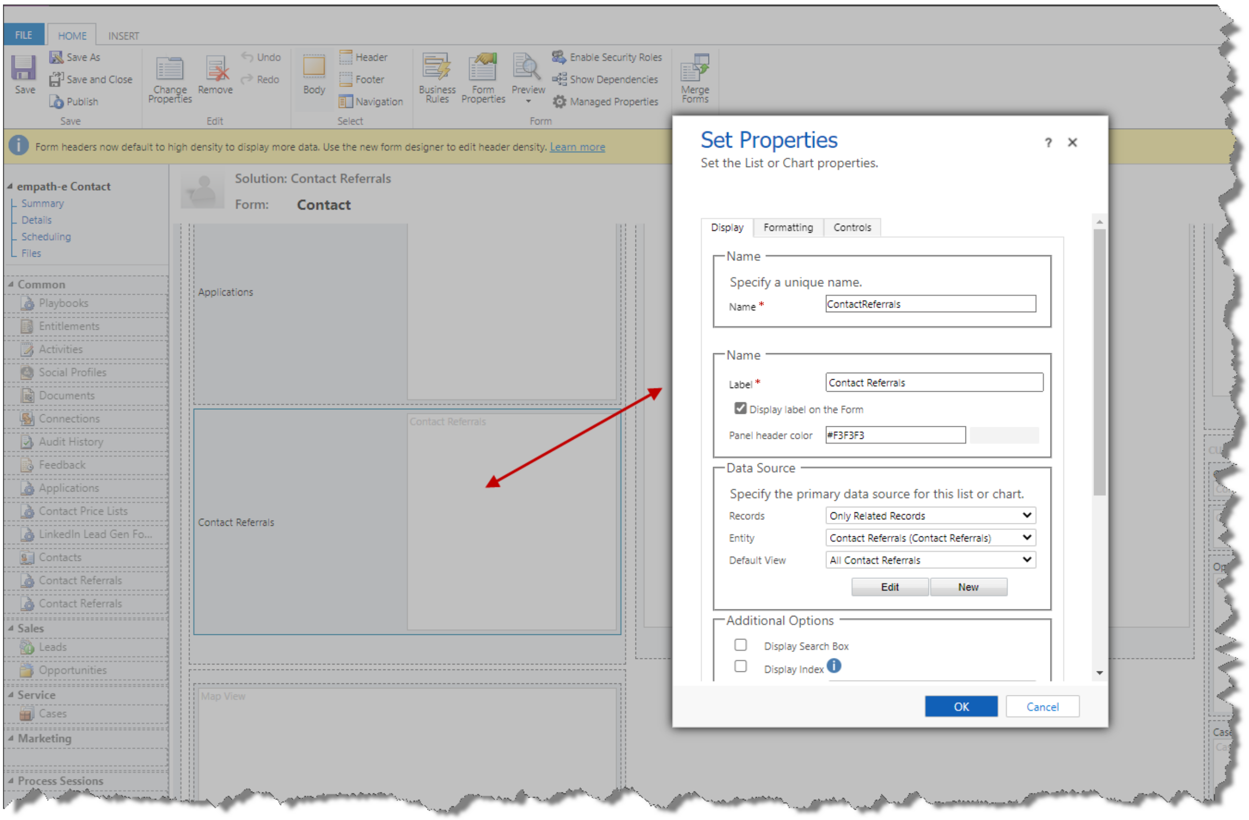
(4) Create Contact Referral Quick View Create Form - Add the Contact Lookup field into the Form



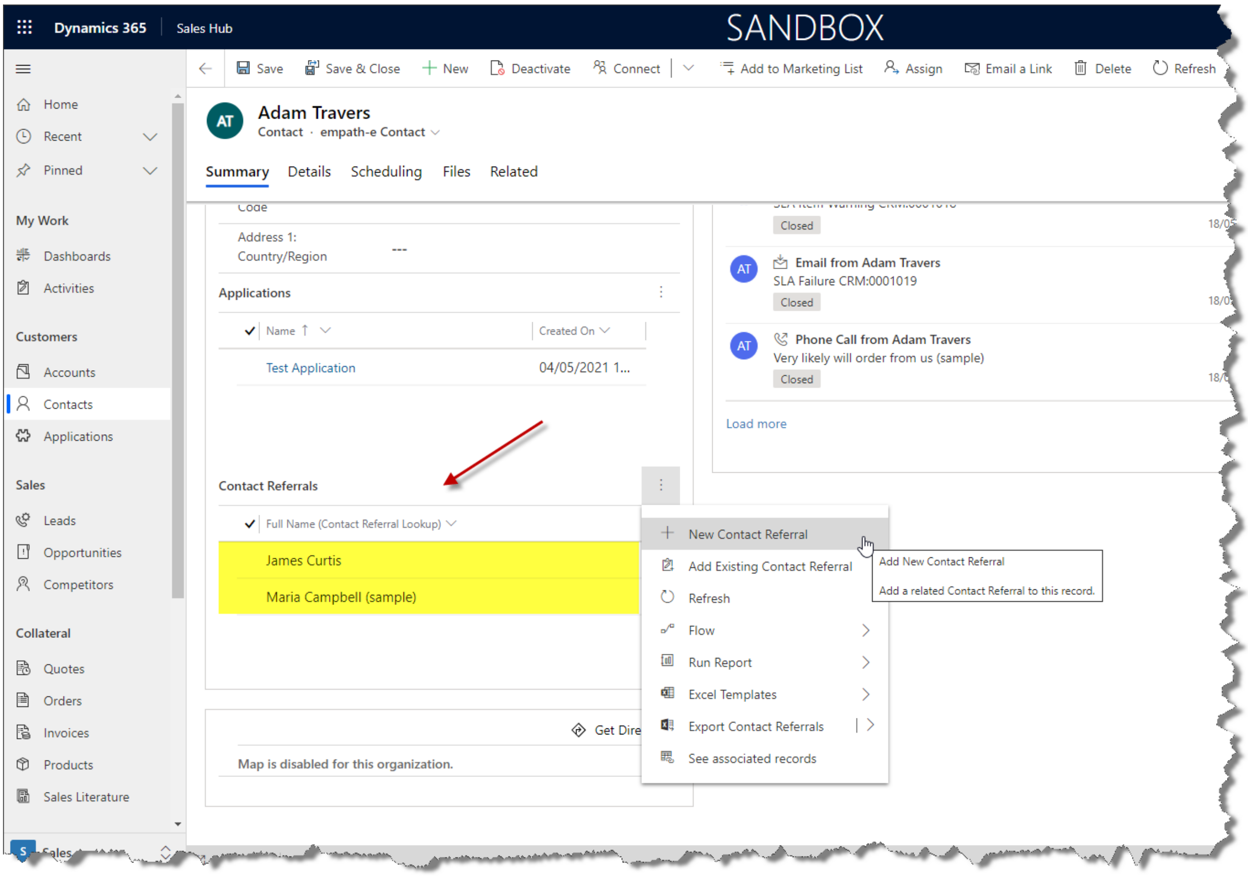
(5) On the Contact Entity create a 1 to Many join to the Contact Referral table



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



Publish All


Dynamics 365
Sales Hub
SANDBOX
Save
Save & Close
New
Deactivate
Connect
Add to Marketing List
Assign
Email a Link
Delete
Refresh
Home
Recent
Pinned
My Work
Dashboards
Activities
Customers
Accounts
Contacts
Applications
Sales
Leads
Opportunities
Competitors
Collateral
Quotes
Orders
Invoices
Products
Sales Literature
Adam Travers
Contact · empath-e Contact
Summary
Details
Scheduling
Files
Related
Address 1:
Country/Region
Applications
Name
Created On
Test Application
04/05/2021 1...
Contact Referrals
Full Name (Contact Referral Lookup)
James Curtis
Maria Campbell (sample)
Map is disabled for this organization.
New Contact Referral
Add Existing Contact Referral
Refresh
Flow
Run Report
Excel Templates
Export Contact Referrals
See associated records
Add New Contact Referral
Add a related Contact Referral to this record.
Closed
Email from Adam Travers
SLA Failure CRM:0001019
Phone Call from Adam Travers
Very likely will order from us (sample)
Load more