



c360 Relationship Explorer/Charting for Microsoft Dynamics CRM 4.0

Overview

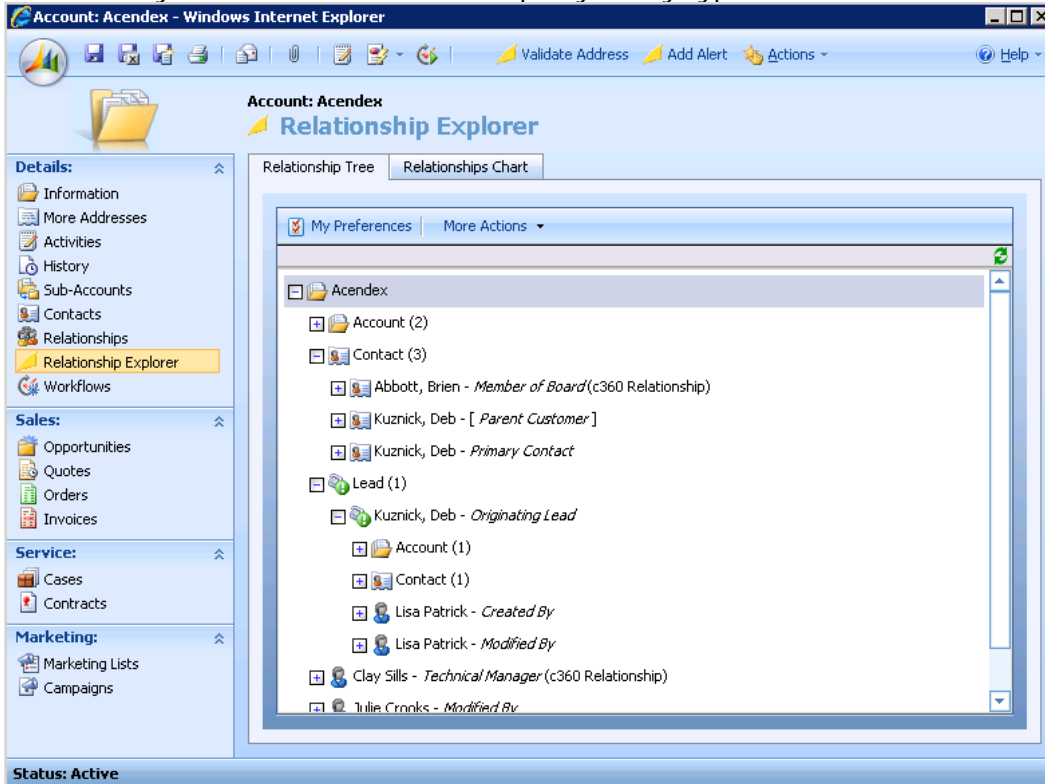
c360 Relationship Explorer/Charting is a Microsoft CRM enhancement that improves and extends the relationship display and linking capabilities of Microsoft CRM.

There are 2 distinct ways in which to create and view relationships between entities within c360 Solutions Relationship Explorer:

- 1) Relationship Tree
- 2) Relationship Charts

The **Relationship Tree** component uses an intuitive tree-based structure to display all relationships that exist between entities within Microsoft CRM. Relationship Tree allows Microsoft CRM users to:

- From any CRM record, see all relationships that exists between CRM entities (including custom entities) in an intuitive hierarchical tree-based structure
- See a complete view of any CRM record's relationship hierarchy in a single place
- Set user preferences to determine how the relationship tree should display including which entities to include/exclude, which entities to display in detail and which to summarize
- Immediately see a count of relationships by entity type





The Relationship Explorer tree view discovers and displays all relationships (Standard relationships and c360 relationships) between CRM entities

The screenshot shows a dialog box titled "Relationship Explorer Preferences -- Webpage Dialog". The main title is "Relationship Explorer Preferences" with a subtitle "Determine which entities are displayed and rolled up in Relationship Explorer". It features a table with columns for "Entity", "Display", and "Roll-up". Below the table are four unchecked checkboxes: "Disable Node Looping", "Hide Child-Parent Relationships (N:1 relationships)", "Hide Relationship Names", and "Hide N:N relationships". At the bottom are buttons for "OK", "Save as default", "Restore Defaults", and "Cancel".

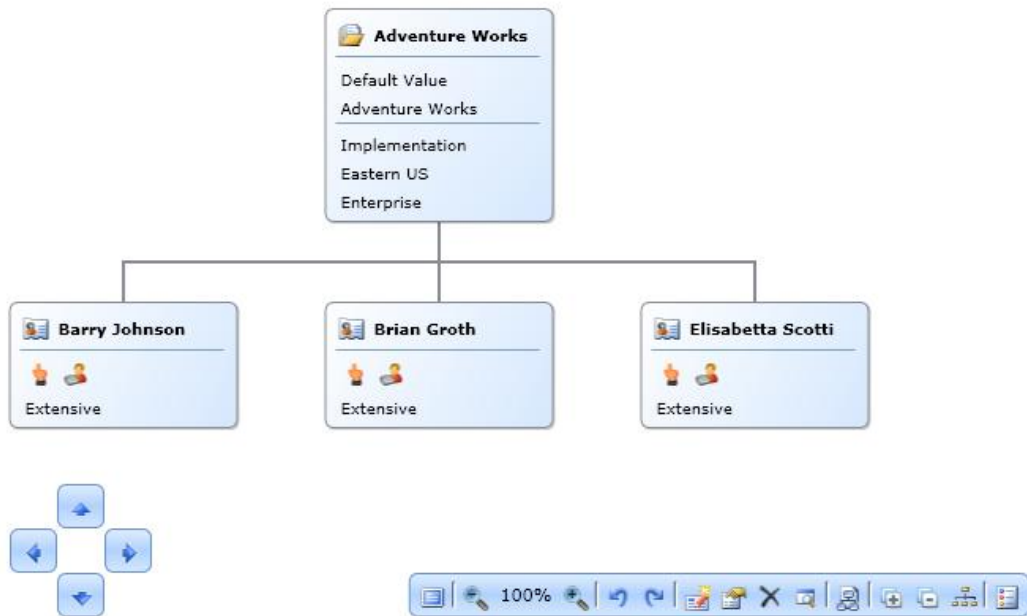
Entity	<input type="checkbox"/> Display	<input type="checkbox"/> Roll-up
Column Mapping	<input type="checkbox"/>	<input type="checkbox"/>
Commitment	<input type="checkbox"/>	<input type="checkbox"/>
Competitor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Competitor Address	<input type="checkbox"/>	<input type="checkbox"/>
Competitor Product	<input type="checkbox"/>	<input type="checkbox"/>
Completed Workflow Scope	<input type="checkbox"/>	<input type="checkbox"/>
Contact	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact Node	<input type="checkbox"/>	<input type="checkbox"/>
Contract	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Line	<input type="checkbox"/>	<input type="checkbox"/>
Contract Template	<input type="checkbox"/>	<input type="checkbox"/>

Relationship Explorer allows the user to set individual preferences such as which entities to display in detail and which to summarize (roll-up)

The **Relationship Chart** component uses cutting edge technology (Microsoft Silverlight) combined with Microsoft Dynamics CRM platform to produce complex organizational and customer relationships charts. c360 Relationship Charts Add On includes the following features:

- Create relationship charts for Account, Contact and Opportunity entities.
- Create Many-To-Many relationships between Accounts and Contacts.
- Drag and Drop functionality to easily structure the chart.
- Automatic Realign of chart.
- Zoom In and Zoom Out for better visualization of chart.
- Undo and Redo latest operations.
- Full screen mode.
- Wizard to quickly create chart.
- Set attributes (icons and text) for Account or Contact chart nodes.
- Set attributes (icons and text) for Account or Contact chart relationships.
- Quick access to account and contact form of Microsoft CRM.
- Collapse mode to minimize the presented data.
- Print capability to print the chart.
- Support for advanced find queries using chart data.

- Full integration with Microsoft CRM security model.



Evaluation Copies

Free evaluation copies of Relationship Explorer can be obtained from c360 Solutions' web site. Evaluation copies come with a license key that provides unlimited usage with the Adventure Works Cycle Demo sample installation of Microsoft CRM. 15 day trial production evaluation license files are also available on the c360 web site.

Pricing

Relationship Explorer is available as a standard product in the c360 Core Productivity Pack. For details on the Sales Productivity Pack visit <http://www.c360.com/ProductivityPack.aspx>. Pricing information is available at <http://www.c360.com/Pricing.aspx>.

Languages

All c360 products are available in multiple languages and can be easily translated into additional languages by simply making changes to the label and caption values found in a separate .XML document. Each product's Installation and Configuration guide provides detail on making language modifications. All product downloads include language files for multiple languages.

Licensing

The number of Relationship Explorer licenses must equal or exceed the number of assigned user licenses or Relationship Explorer will not function for any user. For example, a company that has purchased 25 Microsoft CRM licenses, but has only 11 of them assigned to users needs 11 Relationship Explorer licenses.



Support, Upgrades and Enhancements

The list price of Relationship Explorer includes first year support, upgrades and enhancement per the c360 Solutions Software license agreement. After the first year, a support and enhancement plan can be purchased for 20% of the total cost of all Relationship Explorer licenses.

c360 Partner Program

Authorized Microsoft CRM partners may inquire about the c360 partner program by visiting <http://www.c360.com/PartnerProgram.aspx>.

Information

For more information on Relationship Explorer, contact c360 Solutions at:

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