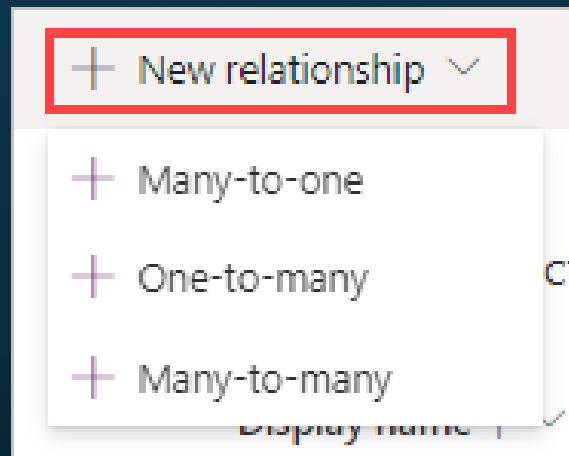
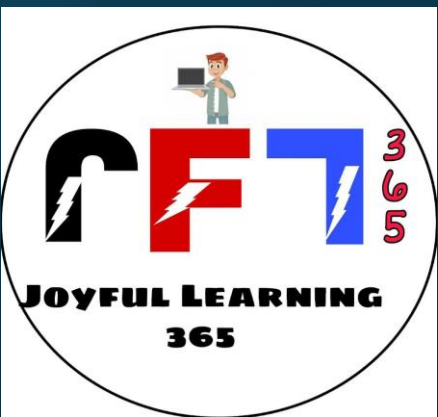


Relationships

MS Dynamics 365 CRM



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Relationships in MS D365 CRM?

Relationship defines how a particularly specific entity record is related to another specific entity record.

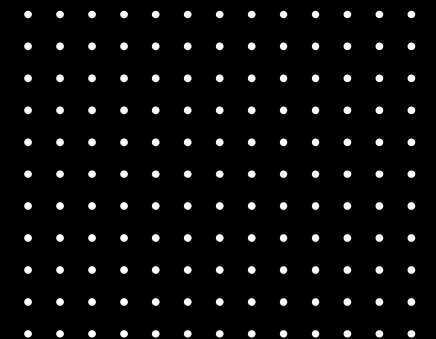
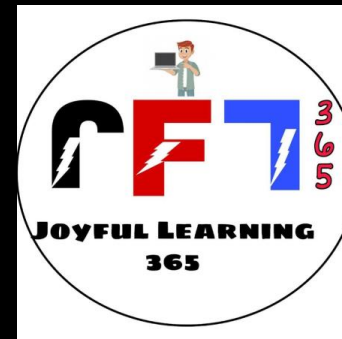
For Example:

The Account entity record can have a unique logical relationship with the Contact entity record which represents the actual connection between the account and its contact.



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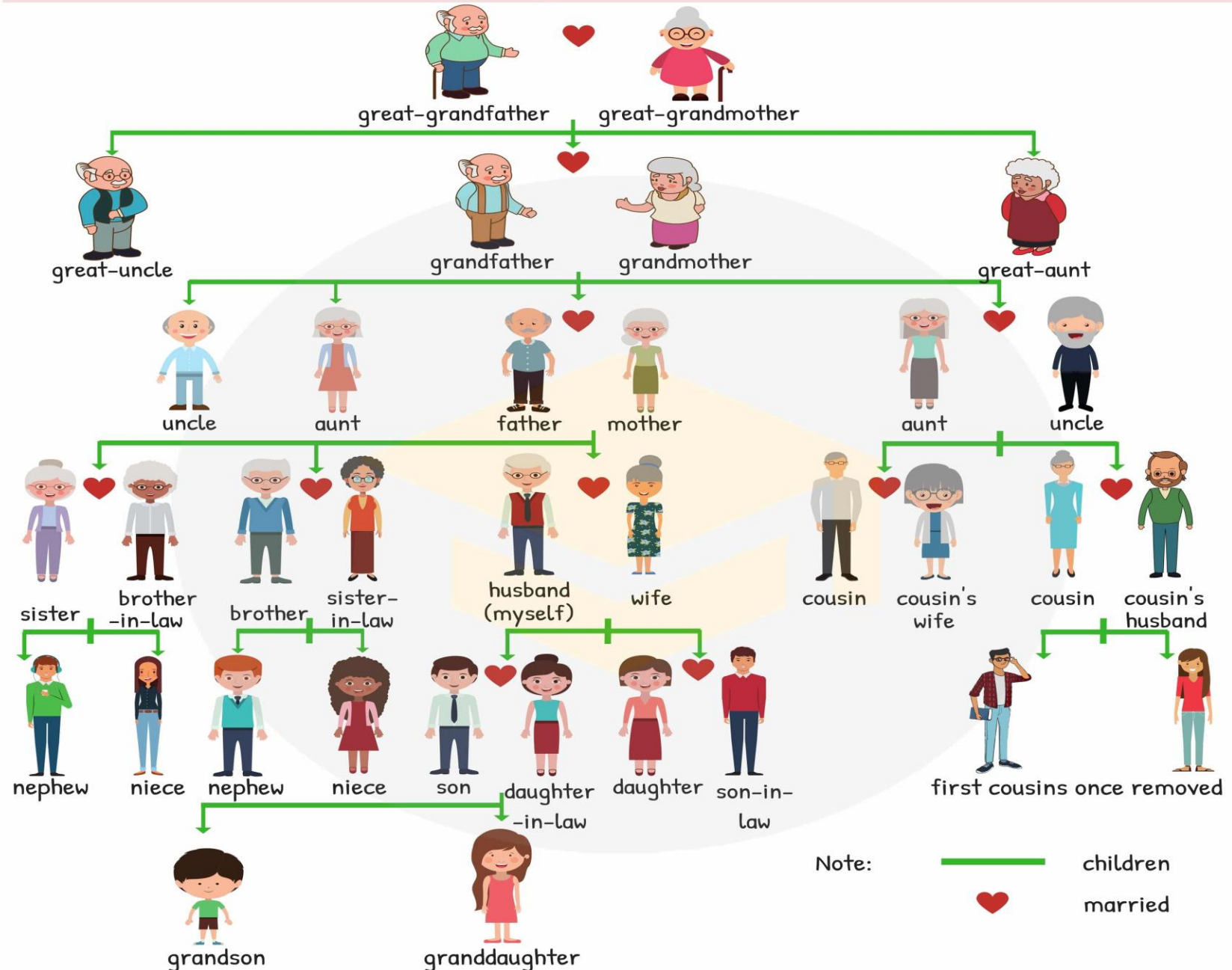
Relationships



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Family Members



Relationships Types in MS Dynamics 365 CRM

Relationships (3 Types)

1:N (One to Many)

N:1 (Many to One)

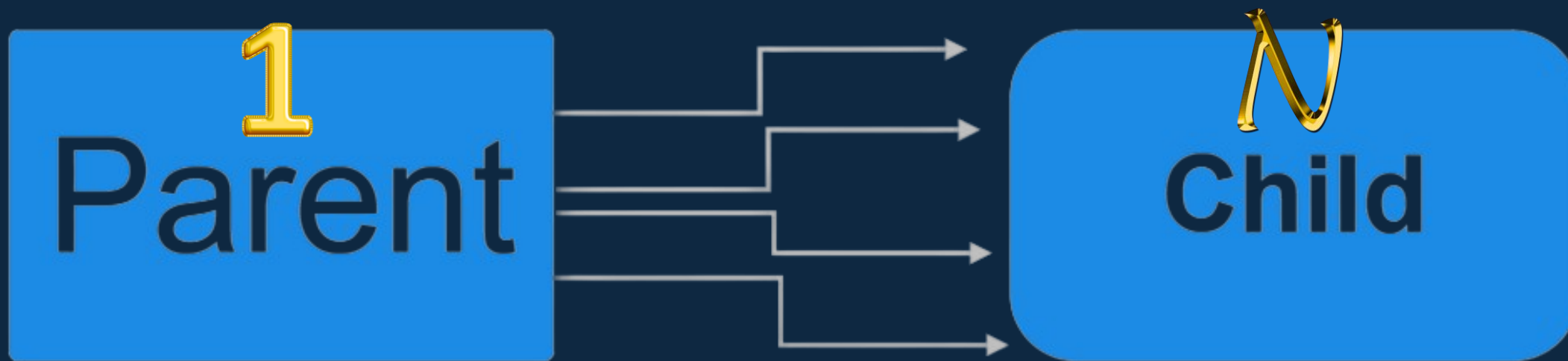
N:N (Many to Many)



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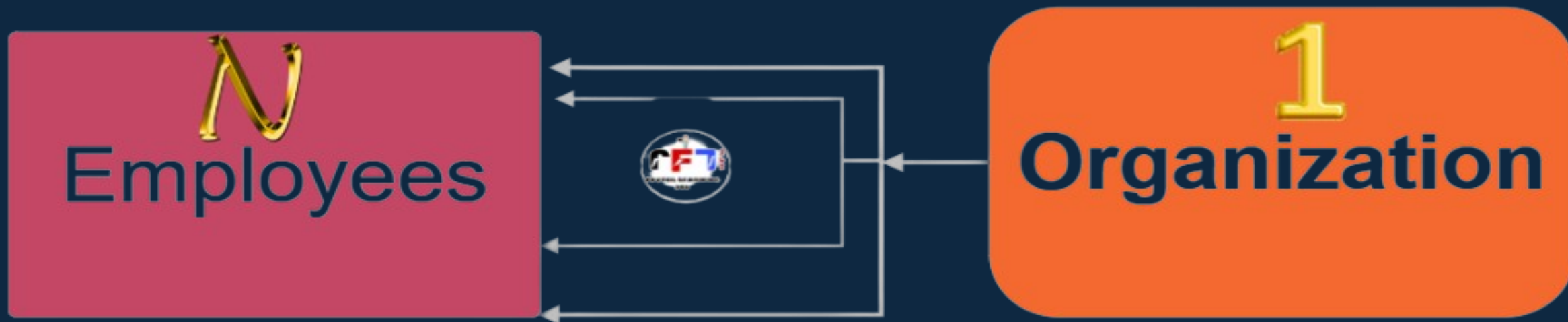
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1) 1: N Relationship (One to Many)



Relationship defines how the records can be related to each other in the CRM database. Adding a lookup field to an entity creates a new 1:N (one-to-many) relationship between the two different entities. With help of the lookup field, one parent entity record is associated to many child entity records. Basically it forms the parent-child relationships. A parent object can have many child's objects but a child object must have only one parent object.

2) N: 1 Relationship (Many to One)



Several Primary child entity records have relation with one single parent entity record.

For Example:

Multiple Employee entity record will have a common Organization entity record related with it.

3) N: N Relationship (Many to Many)



Movies & Directors Intersection Table

In an N:N Relationship, there isn't a singular primary entity record and another related entity record; instead, both entities function as both types

For Example:

You might want one 'Movies' entity record related to many 'Directors' entities or one 'Director' entity related to many 'Movies' entities

Types of entity relationship in Microsoft CRM

1. One-to-Many (1:N):

Usage: This is the most common type of relationship. It signifies a single record from one entity (e.g., "Account") related to multiple records in another entity (e.g., "Contact"). For example, an account can have multiple associated contacts.

2. Many-to-One (N:1):

Usage: The opposite of One-to-Many, where multiple records in one entity are related to a single record in another entity. For instance, many contacts associated with a single account.

3. Many-to-Many (N:N):

Usage: Represents a many-to-many relationship between two entities. Both entities can have multiple records associated with multiple records in the other. Typically, a junction entity is used to facilitate this relationship. For example, a many-to-many relationship between "Contact" and "Opportunity" entities, where a junction entity might be "Opportunity Contact" to link contacts to opportunities.

+ New relationship ▼

+ Many-to-one

+ One-to-many

+ Many-to-many

display name

Lookup columns and relationships



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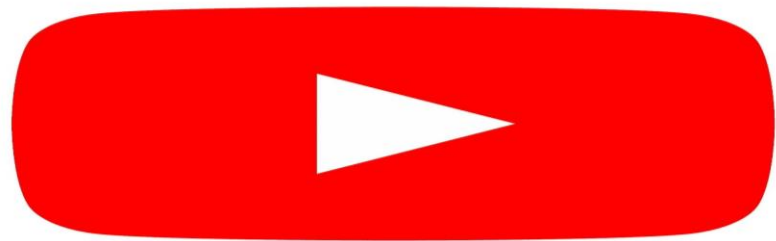
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An easy way to create a table relationship is by creating a column with data type Lookup to another table. Creating a lookup column creates a many-to-one relationship. Correspondingly, creating a one-to-many relationship creates a lookup column on the related table.

The screenshot shows the 'New column' configuration form in Power BI. The form has the following fields and settings:

- Display name ***: A text box containing 'Pet'.
- Description ⓘ**: An empty text box.
- Data type *** ⓘ: A dropdown menu with 'Lookup' selected, indicated by a magnifying glass icon.
- Required ⓘ**: A dropdown menu with 'Optional' selected.
- Searchable ⓘ**: A checkbox that is checked.
- Related table ***: A dropdown menu with 'Pet' selected.
- Advanced options**: A link with a downward arrow.

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