

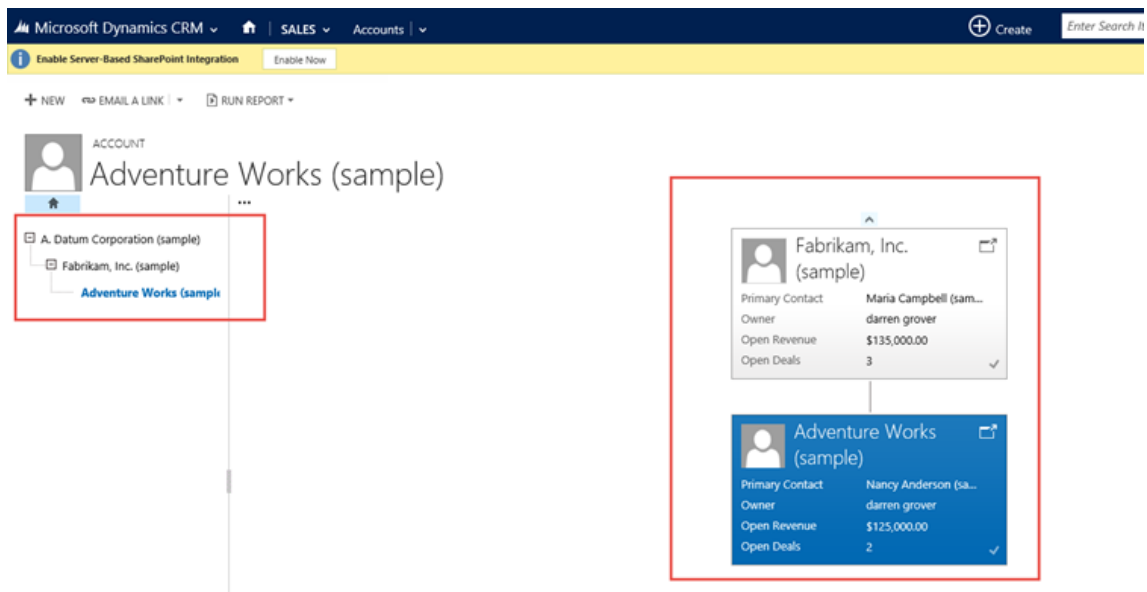
## Hierarchy Visualization in Dynamics CRM 2015

1. A new feature available in Dynamics CRM 2015 is the ability to visualize a hierarchy of records.
2. This allows a user to 'see' where a particular record fits in the within the parent/child relationship for a given entity.
3. For example, an Account record in CRM could have a 'Parent Account' or many 'Sub-Accounts' or child accounts. It is now possible to display these relationships as hierarchy visualization.
4. Our first example will be with the Account entity and how to access the hierarchy.
5. In a list of Accounts, an icon will display if the record has child Accounts, a Parent Account, or both. To access the hierarchy for a particular record, click on that icon.

Microsoft Dynamics CRM 2015 interface showing the 'My Active Accounts' list. The list displays account details including Account Name, Main Phone, Address 1: City, Primary Contact, and Email. A red box highlights the 'Adventure Works (sample)' account, which has a tree icon indicating it has a parent account, 'Fabrikam, Inc. (sample)'.

Account Name	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)
A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	someone_i@example.com
Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sample)	someone_c@example.com
Alpine Ski House (sample)	555-0157	Missoula	Paul Cannon (sample)	someone_h@example.com
Blue Yonder Airlines (sample)	555-0154	Los Angeles	Sidney Higa (sample)	someone_e@example.com
City Power & Light (sample)	555-0155	Redmond	Scott Konersmann (sample)	someone_f@example.com
Coho Winery (sample)	555-0159	Phoenix	Jim Glynn (sample)	someone_j@example.com
Contoso Pharmaceuticals (sample)	555-0156	Redmond	Robert Lyon (sample)	someone_g@example.com
Fabrikam, Inc. (sample)	555-0153	Lynnwood	Maria Campbell (sample)	someone_d@example.com
Fourth Coffee (sample)	555-0150	Renton	Yvonne McKay (sample)	someone_a@example.com
Litware, Inc. (sample)	555-0151	Dallas	Susanna Stubberod (sample)	someone_b@example.com

6. In this example – we can see that 'Adventure Works' has a parent account – 'Fabrikam, Inc'. This is display as a tree (left side of screenshot) or tile view (middle/right of screenshot)



7. In order to view further relationships in the hierarchy – can click the arrows to expand further in the tile view. We can now see ‘A. Datum Corporation’ is the parent for ‘Fabrikam’

**NOTE:** The checkboxes are used to select multiple tiles and edit or run commands on multiple records at once.

Microsoft Dynamics CRM | SALES | Accounts | Create | Enter Search

Enable Server-Based SharePoint Integration | Enable Now

+ NEW | EMAIL A LINK | RUN REPORT

ACCOUNT  
Fabrikam, Inc. (sample)

- A. Datum Corporation (sample)
  - Fabrikam, Inc. (sample)
    - Adventure Works (sample)

A. Datum Corporation

Primary Contact: Rene Valdes (sample)

Owner: darren grover

Open Revenue: \$185,000.00

Open Deals: 4

Fabrikam, Inc. (sample)

Primary Contact: Maria Campbell (sam...)

Owner: darren grover

Open Revenue: \$135,000.00

Open Deals: 3

Adventure Works (sample)

Primary Contact: Nancy Anderson (sa...)

Owner: darren grover

Open Revenue: \$125,000.00

Open Deals: 2

8. It is also possible to access the hierarchy while viewing the record by running the 'View Hierarchy' command.

Microsoft Dynamics CRM | SALES | Accounts | Fabrikam, Inc. (sam... | Create | Enter

SAVE | SAVE & CLOSE | + NEW | DEACTIVATE | CONNECT | ADD TO MARKETING LIST | ASSIGN | ...

ACCOUNT  
Fabrikam, Inc. (sample)

Summary

**ACCOUNT INFORMATION**

Account Name: Fabrikam, Inc. (sample)

Phone: 555-0153

Fax: --

Website: <http://www.fabrikam.com/>

Parent Account: A. Datum Corporation (sample)

Ticker Symbol: --

**ADDRESS**

7995 Edwards Ave.  
Lynnwood, TN 58299  
U.S.

**POSTS** | ACTIVITIES | NOTES

Enter post here

Both | Auto posts | User posts

test  
darren grover won Opportunity for Account  
Congratulations!  
On test's wall  
12/17/2014 12:42 PM

test  
Opportunity: Created by darren grover for Account Fabrikam, Inc. (sample).  
On test's wall  
12/17/2014 12:42 PM

Product service time (sample)

... | Email a Link | Delete | Form | View Hierarchy | Share | Share Secured Fields | Follow | Run Workflow | Start Dialog | Run Report | Relationship

9. This feature is enabled for the Account, and User entities,
10. But can enable for other out-of-box entities.
11. The visualization feature can only be enabled for self-referencing relationships within a particular entity, including custom entities.

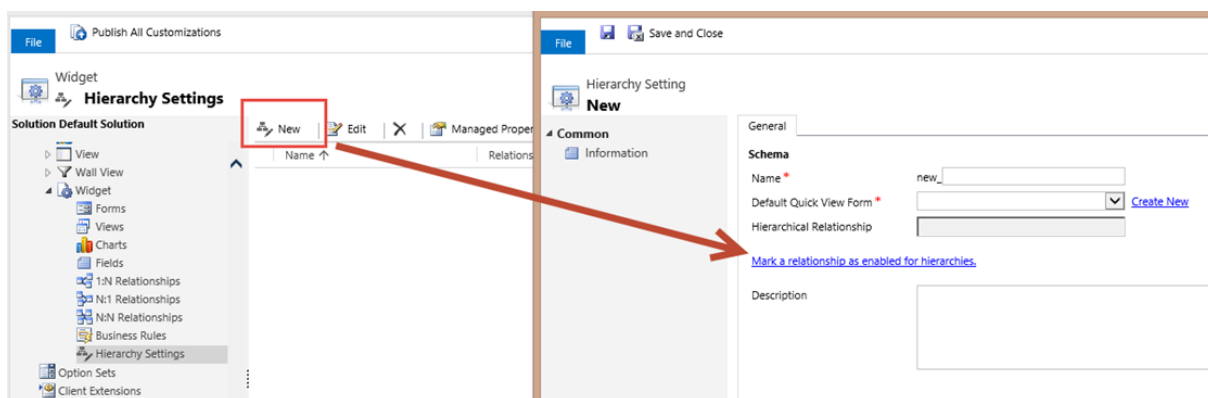
**Important items to consider when using hierarchal visualizations (from the MSDN Technet website):**

1. Only one (1: N) self-referential relationship per entity can be set as hierarchical. In this relationship the primary entity and the related entity must be of the same type, such as **account\_parent\_account** or **contact\_parent\_contact**
2. Presently, a hierarchy or visualization is based on one entity only.
3. You can depict the account hierarchy showing accounts at multiple levels, but you can't show accounts and contacts in the same hierarchy visualization.
4. Maximum number of fields that can be displayed in a tile is four.
5. If you add more fields to the Quick Form that is used for the tile view, only the first four fields will be displayed.
6. Most important to understand, it is only possible to display a hierarchy of 'Accounts' or hierarchy of 'Contacts' – but not multiple entities in the same visualization.

**To configure an entity for hierarchy visualization – there is a new area in the entity components called 'Hierarchy Settings'**



In this example, we will enable hierarchy for a custom entity we have called 'Widgets'

1. Go to the entity 'Hierarchy Settings'. Click **New** – then 'Mark a relationship as enabled for hierarchies'.



2. Since the Widget entity has a Parent/Child relationship – we first have to enable hierarchies by selecting the relationship and then **Mark hierarchical**. Then click **Done**.

**NOTE:** If the entity does not have a self-referencing relationship (Parent/Child relationship within the entity) then you will not be able to add or edit a visualization.



 Mark hierarchical									
Is Hierarchical?	Schema Name ↑	Primary Entity	Related Entity	Type of Behavior...	Field Name	State	Customizable	Field Description	
<input checked="" type="checkbox"/>	False	new_new_widget_new_wid...	Widget	Widget	Referential	Parent Widget	Unmanaged	True	

1 - 1 of 1 (1 selected)

Done

3. Enter a name (schema) for the hierarchy and choose the quick view form that will be used for display. Click **Save and Close**. Once configurations have been made – then you click ‘Publish All Customizations’.

**NOTE:** The first four fields in the chosen Quick View form will be used in the display.

  Save and Close

## Hierarchy Setting

### New

non  
Information

#### General

##### Schema

Name \*

new\_widget

Default Quick View Form \*

select default quick view form  
New Form

[Create New](#)

Hierarchical Relationship

[Mark a relationship as enabled for hierarchies.](#)

Description