SalesLogix Enhancements

Relationship Manager

Date: 06/10/09
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CONTENTS

1.0 OVERVIEW

Provision

- Display hierarchical relationships based on data in SalesLogix.
- Provide export to Mind Manager™
- Treeview to display SalesLogix Associations plus external relationships

This utility enables you to see at a glance who reports to whom, what contacts are associated and what accounts are linked to other accounts. You can also add **contact to company** relationships that allow you to see who is linked to what company and at what level. This is aside from the normal SalesLogix Account to Account and Contact to Contact associations.

The utility brings together many pieces of information in order for you to display a consolidated view of each contact/company.

Bundle Contents

The following plugins are supplied or updated in this bundle.

Plugin Type	**Item**
Table	EM_RELATIONSHIP – holds external relationships
Scripts, VBscript System:	EMVS_RELATIONSHIPS_SUPPORT
	EMAS_MINDMANAGER_ACCOUNT
	EMVS_RELATIONSHIPS_SUPPORT
Forms System:	EMAF_RELATIONSHIPS (main display form)
	EMAF_REL_MANAGE (Add/Edit form for external relationships)
	EMAF_MINDMANAGER (Mind Manager Plugin)
Toolbars System:	EM_RELATIONSHIPS
Menus System:	{None}
Picklist:	RELATIONSHIP TYPE (for external relationships)

Updated:
(None)

Impact Analysis

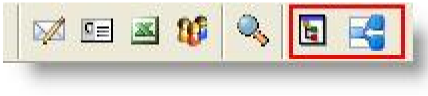
None of the additions will alter the system in any way and can be easily removed without issue. The table is **not** removed upon de-installation (to preserve any data) and will need to be removed manually if required via Architect.

Installation

Simply install the bundle as normal – all plugins are unique and the bundle will install the plugins as normal.

Post Bundle Install

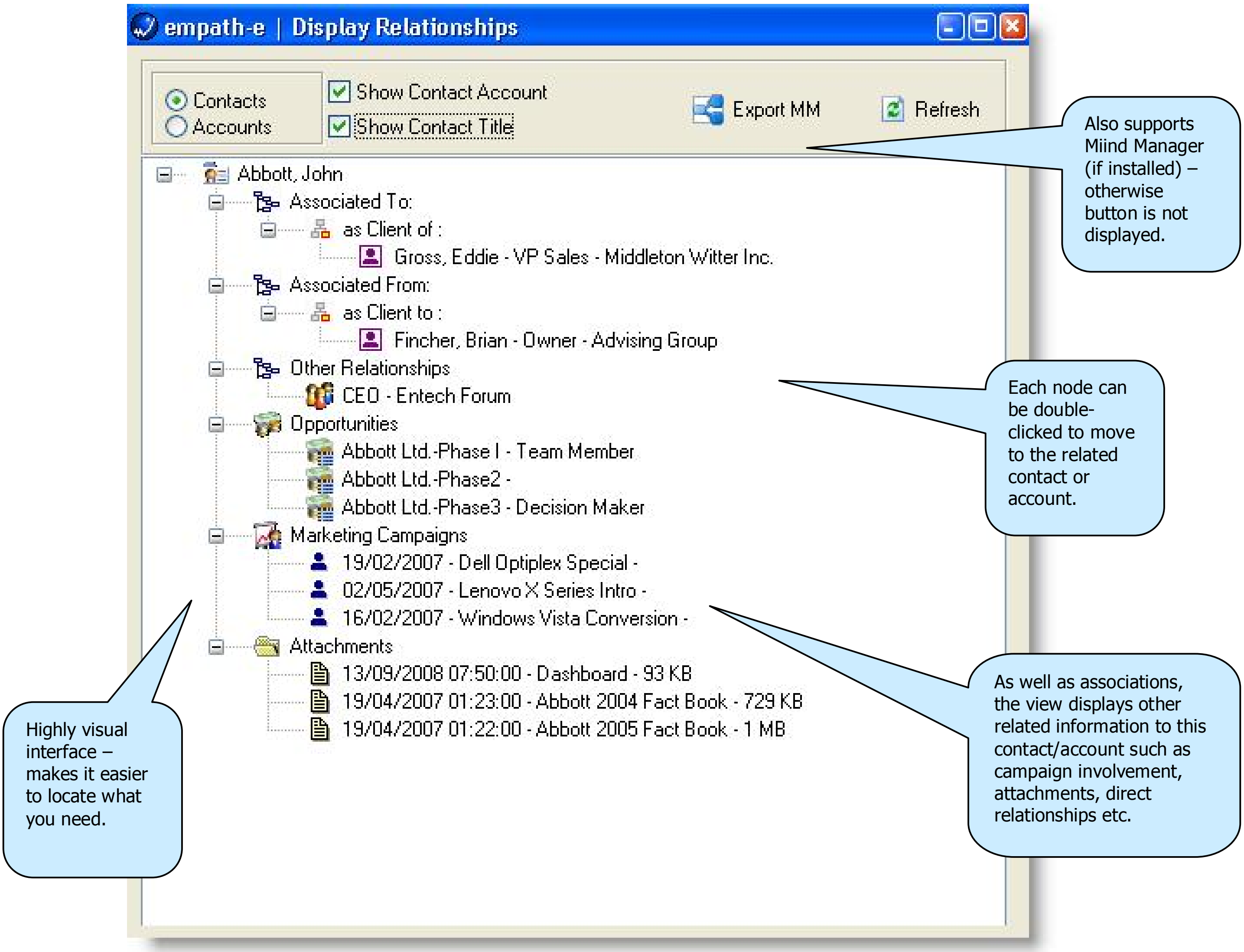
The toolbar will be appended with the following new icons:



The first button invokes the relationship view, the second invokes the MindManager™ export if required/installed.

2.0 VIEWING ASSOCIATIONS

Move to the relevant record within SalesLogix and then press the toolbar button to show the relationship view for this account/contact:



The top level node displays the current contact. All sub-relations are then shown under each node category.

The window is non-modal – you can continue to move around SalesLogix (just hit refresh to display the current relationship view).

Move to Record

Double-click any node and it will move to that record within SalesLogix – leaving the existing relationship view intact. This means you can browse around all relationships without the need to invoke any further views.

Double-clicking does the following:

View	Action
Associations	Moves to that record
Other relationships	Moves to the account record
Opportunities	Moves to the opportunity view
Marketing Campaigns	Opens the campaign main-view
Attachments	Opens the attachment, if available

NB: Attachments - if an attachment is found then it will be opened in the local application e.g. Microsoft Word/Excel. If it cannot be found then you will be asked whether you wish to open this from the main filestore (on the server). This enables a remote client, who has not synced attachments, but is on the corporate network to still open attached files. If the file cannot be located then the user is informed appropriately.

Account View at Contact Level

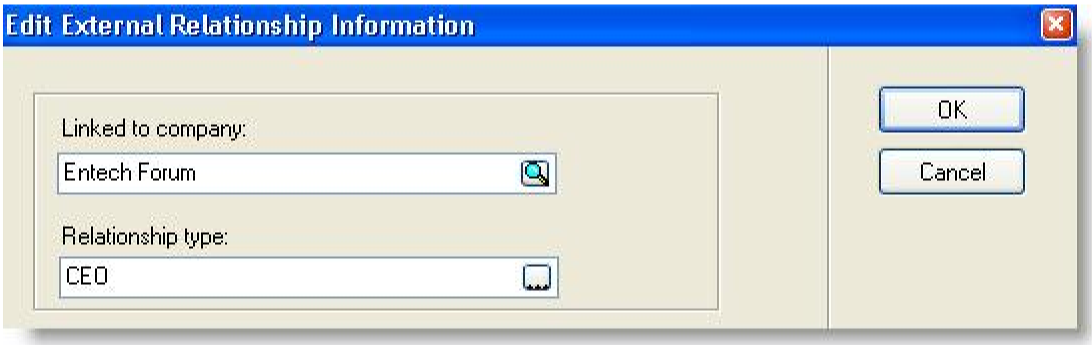
Simply switch the radio-group button and the view will change to showing account level relationships.

Other Relationships

This node enables you to define relationships that are from Contact ▸ Account level e.g. Directorship/Chairman. These are different from the normal SalesLogix Account ▸ Account or Contact ▸ Contact level relationships.

Adding a relationship

Right mouse click the **Other Relationships** node and select "Manage/Add Item" – the following view will then display:



Locate the account you wish to link this contact to and then add the relationship type. The view will then refresh with this displayed. If you wish to alter the type, simply right mouse click and edit the relationship.

Deleting a relationship

Right mouse click the desired node to be deleted and select "Delete".

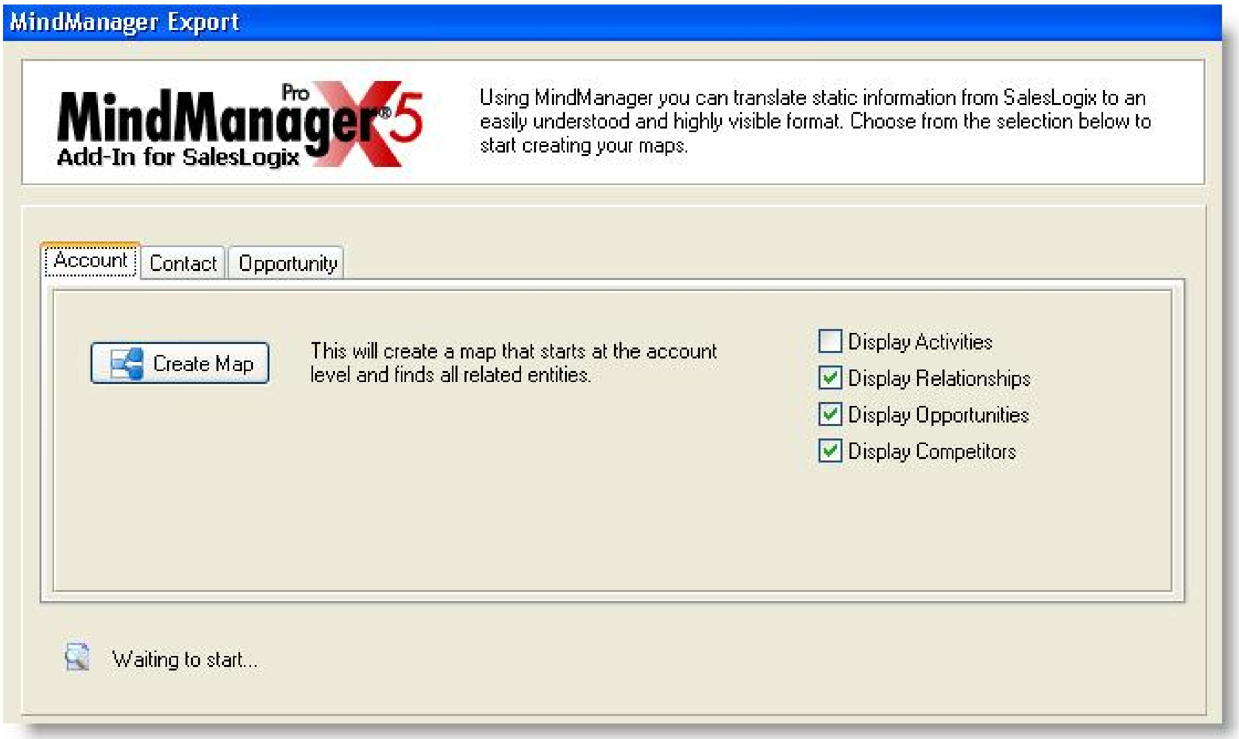
NB: *Only "Other Relationships" may be deleted from this view. Selecting delete on any other node is ignored.*

MINDMANAGER ADD-IN FOR SALESLOGIX V7.5.X

Mind Manager™ from MindJet (http://www.mindmanager.com) enables you to display the existing relationships in a totally different way than the normal grids/tree-views that SalesLogix supports. It's an exceptionally powerful tool and enables any user to display existing SalesLogix data and add annotations on relationships (these are not stored however) and enables sales people to "draw" on the canvas and build up relationship lines that had not been considered previously.

As well as a "who knows who" display – it also summarises activity and, when combined with a user team, further lines/avenues of links can be created.

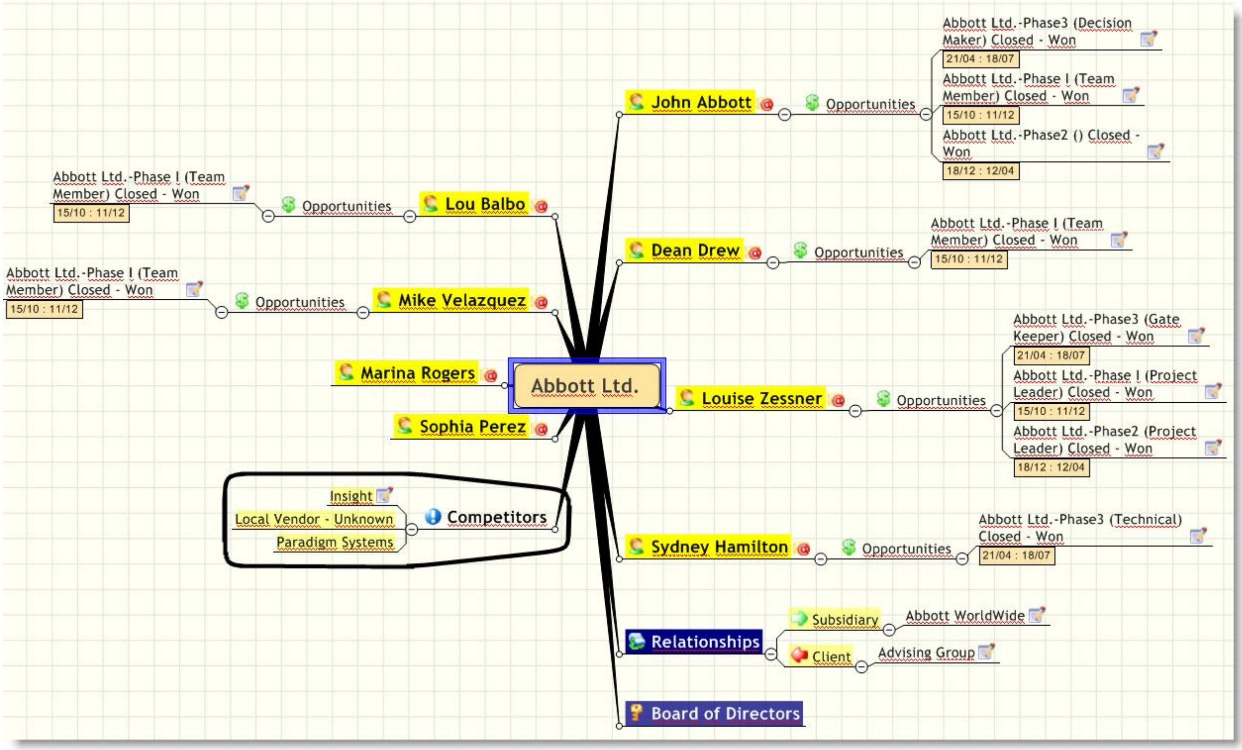
By clicking the MindManager button (either from the toolbar or from within the relationship viewer) the following is displayed:



This is a "shell", the account level entities are defined (with the contact and opportunity tabs ready to be extended if required).

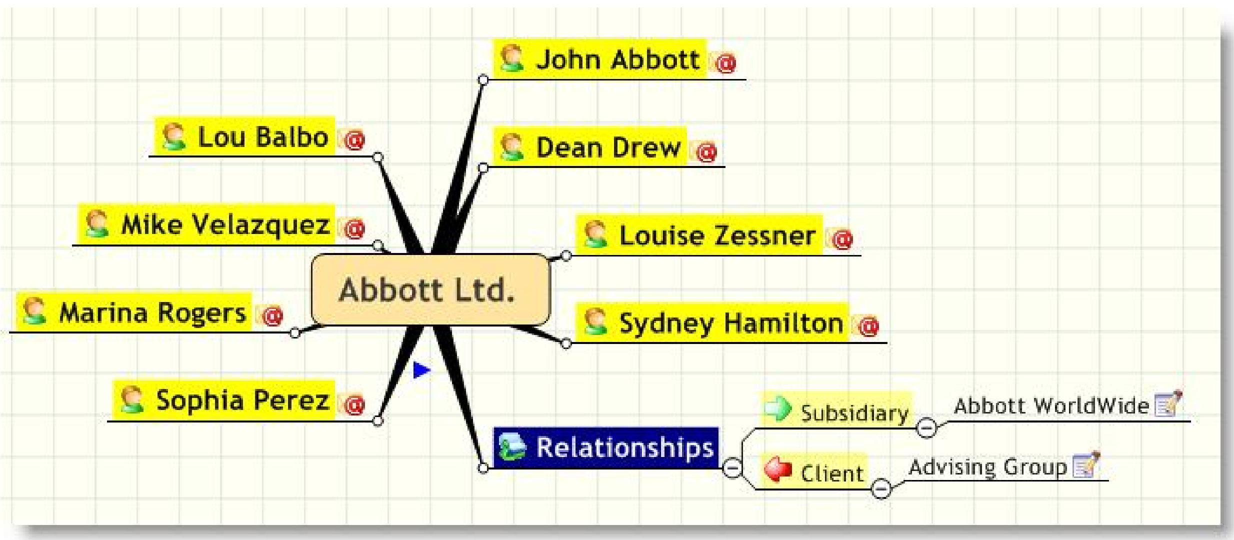
Simply select the options you want to appear on the map and press **Create Map**.

Example Output



The above has been created automatically. It shows all the relationships from Abbott Limited e.g. the contacts, the opportunities along with associations.

By switching on/off the options – you can simply/extend the map accordingly:



You can download a 60day trial of MindManager from
https://secure.mindjet.com/WebApp/forms/trial.aspx?p=11&lang=en_GB&host=clear