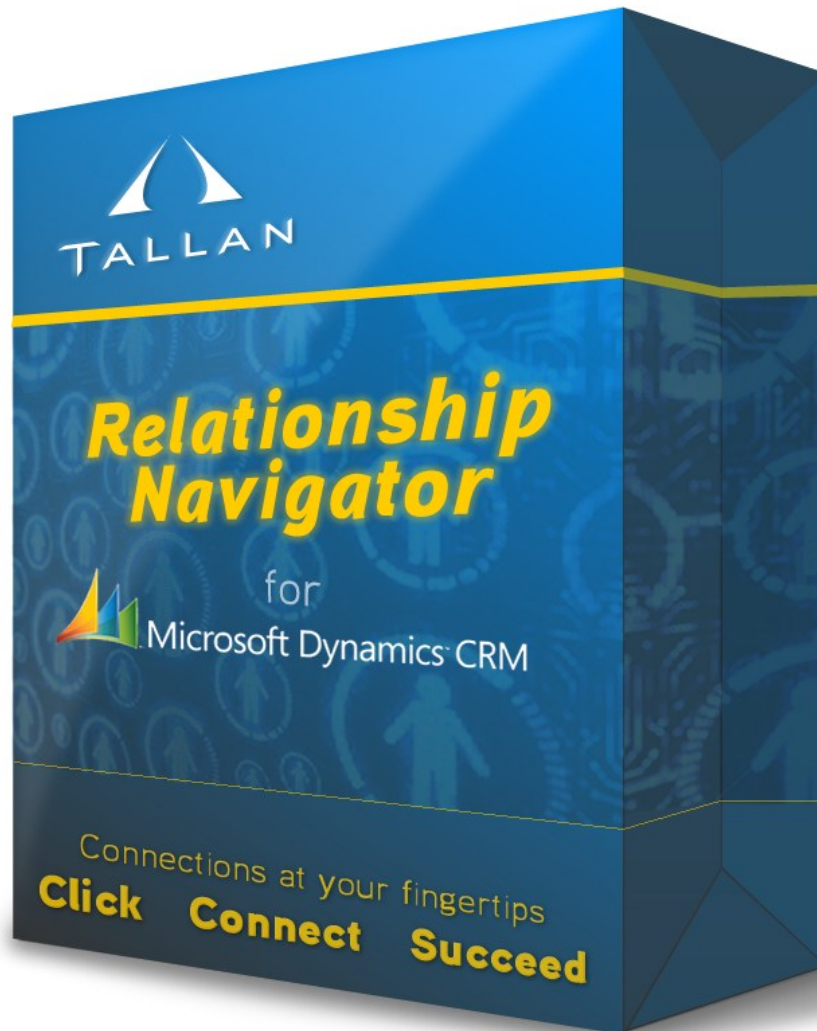


RELATIONSHIP NAVIGATOR

FAQ SHEET



WE BUILD SOFTWARE
THAT HELPS OUR CLIENTS GROW



INSTALLATION

Where can I find instructions on installing Relationship Navigator?

Installation instructions can be found on the Tallan website at:

<http://www.tallan.com/crm/relationship-navigator/InstallationInstructions.pdf>

What permissions do I need?

To install Relationship Navigator in Microsoft Dynamics CRM, you must have permissions to install a solution and customize the Account form. These are part of the System Customizer permissions as are defined in the base installation. Talk to your administrator if you're not sure about your particular configuration.

CONFIGURATION

Can I add Relationship Navigator to the left navigation bar?

Yes, the recommended placement of the Relationship Navigator link is in the left navigation bar of the Account form.

Where else can I add Relationship Navigator?

Relationship Navigator may be added as a web part to anywhere in the Account form. Keep in mind that this will require the data to load every time an account form is opened, so this may cause an undesirable delay for the users.

Will Relationship Navigator work with CRM integrated into Outlook?

Yes, Relationship Navigator will work in the integrated Outlook forms for CRM just as they do on the web pages.

Can I change the columns shown in Relationship Navigator?

The columns can be changed using the **Relationship Attributes** section of **Extensions** under the settings. Currently, the drop-down list only supports a limited set of attributes available. Customized attributes can be added as well, but will require more advanced knowledge of the system. For details, please email info@tallan.com.

How may levels of nesting can the tree view support?

The tree view will support an unlimited number of levels in the hierarchy.

Can I move accounts using drag and drop?

Yes, with the exception of the top level account, an account can be moved within a hierarchy using drag and drop in the tree view.

Can I add an existing account in the tree view?

No, at this time, only accounts within the main parent hierarchy can be arranged in the tree view. To add an existing account, go to that account in the standard view and change the parent account to the appropriate account.

Can I move contacts using drag and drop?

Yes, contacts can be moved within a hierarchy using drag and drop in the tree view.

Can I move multiple accounts or contacts at once?

No. At this time only one account or contact may be moved at once. Multiple selection is not supported.

Can I hide the contacts to make navigating the tree view easier?

Yes, contacts in the tree view can be hidden or shown using the button at the top left of the tree view.

Can I show only contacts of one account in the tree view?

No. At this time showing contacts will show for all expanded accounts. Accounts which are minimized, however, will not show contacts.

Will people be able to see all accounts or only their accounts?

Users of Relationship Navigator are bound within the existing security constraints of Microsoft Dynamics CRM. They will only have access to view and modify those accounts and contacts for which they have appropriate privileges in CRM.