Relationship Charts is not limited to sales. It is a xRM-compliant visualization platform applicable to any vertical.

**Opportunity Decision Makers Chart**

See all decision makers for an Opportunity

**ORG Chart**

Build organization Charts automatically

Relationship Charts supports Microsoft Dynamics CRM 2013, 2011, 4.0 and 3.0.

The last installation was 700 licenses!
Is Relationship Charts a valuable tool?
Yes! Relationship Charts can add value to Microsoft Dynamics CRM in many possible ways.

As a sales analysis tool
When you sell to big organizations where approval is required from multiple players on the buy-side before the deal can be closed you need to identify all the key players; understand each one’s degree of influence and motives, evaluate your competitive position and strengths, and uncover essential unknown information.
The visual approach provided by Relationship Charts allows you to easily grasp the entire picture of an opportunity with all its participants and the relationships between them.

As a guidance tool
When your company has best practices that should be followed by your people, you can use Relationship Charts as a visual guidance tool. Leverage the “ghosts’ concept” when you bring actors to the Charts that will play specific roles in the Opportunity like an Economical Buyer, without knowing the exact person at the time and identifying that person later while working on a Chart. Hints on the Chart will help you to address the motives of each individual, to shore-up weaknesses, and to uncover uncertainties.

As a presentation/collaboration tool
Use Relationship Charts as a visual tool to present your CRM data. Export to PDF if want to print charts easily or export as a picture if you like to send the Charts by email.

As a quick way to work with connection and relationships data
While Standard CRM user interface out of the box allows you to manage Connections and Relationships via different forms. The same operations can be done much faster using Relationship Charts interface by dragging and dropping the actors on the Charts.

As an alternative fast navigation
Each Entity’s form can be opened from Relationship Charts with a simple double click.

What's new?
- Now Relationship Charts are embedded into Account and Opportunity forms
- Relationship labels are shown on the Chart
- Export to PDF
- Lock Charts to archive from further changes
- The functionality of Relationship Charts has been expanded with Solution Selling business templates and a number of workflows that allows building charts automatically when a new Account/Contact/Opportunity is created. Not only a new chart is created automatically, but also new tasks are assigned to key decision makers as soon as you set a Contact to a certain Buying Influence level.
- Compatible with Microsoft Dynamics CRM 2013.

Is Relationship Charts easy to use?
Yes!
With Relationship Charts you can
- automatically build Organization Charts as well as Charts with Sub-accounts
- create activities directly from a chart
- drag and drop to build Connections and Relationships
- set actor properties by mouse clicks
- bring related connections and relationships for any actor via a context menu

What if something is missed out of the box?
Relationship Charts is a completely customizable product that allows you to
- create any Charts for any entities (org charts, contact relationships map, project participants’ chart, opportunity influence chart and many others)
- display any type of relationships including built-in Microsoft Dynamics CRM one-to-many and many-to-many relationships as well as standard Customer and Opportunity relationships and new CRM connections

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