

Relationship Charts Features

Feature	SFA	SFA	Enterprise	Enterprise Ex
MS CRM version	3	4	4	4
Charts Types				
Create charts for contacts, accounts and opportunities	X	X	X	X
Create charts for any entity including custom entity			X	X
Charts Actors				
Display contacts and accounts as actors on the charts	X	X	X	X
Display any entity including custom entity as actors on the charts			X	X
Visualize Relationships				
Visualize MS CRM relationships for contacts, accounts and opportunities (stored in Customer Relationship and opportunities Relationship table)	X	X	X	X
Visualize MS CRM built-in relationships (one to many, many to many)				X
Visualize relationships stored in Custom Entities			X	X
Populate charts with actors				
Add entities to CRM directly from the chart	X	X	X	X
Use Wizard to go through a set of actors selection forms	X	X	X	X
Populate charts using predefined generation templates (actors will be returned as results of the prebuilt query)				X
Bring related actors to the chart (select an actor on the chart and bring items that have a particular type of relationship with that actor)				X
Copy all actors from an existing chart				X
Copy all actors from the current chart to another chart				X
Miscellaneous				
Create notes against actors		X	X	X
Link an actor with existing relationship charts		X	X	X
Lock charts to archive from further changes	X	X	X	X
Export to Excel™	X	X	X	X
Edit charts with undo, redo, or reset	X	X	X	X
Multi-tenancy, multi-currency and multi-language		X	X	X
Zoom		X	X	X
Display pictures for actors		X	X	X
Technological Platform	HTML	Silverlight	Silverlight	Silverlight
Deployment model				
On premise	X	X	X	X
Hosted		X	X	X
Online (MS CRM Live)		X	X	X
Additional add-ons				
Custom Views designer				X