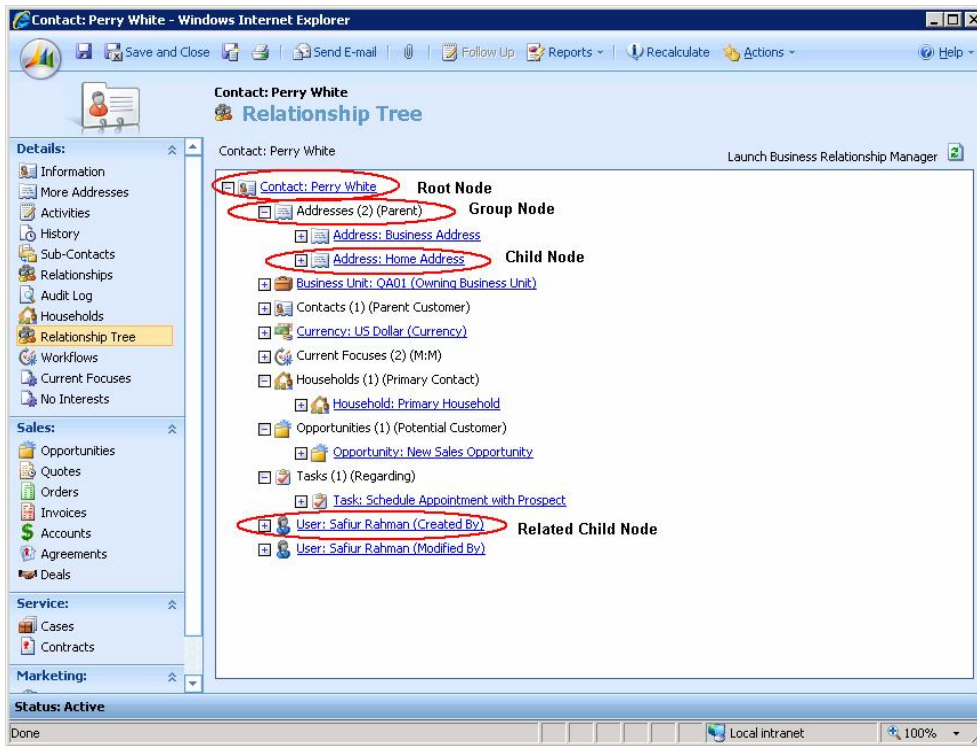


# RELATIONSHIP TREE

## GALEFORCE CRM FOR FINANCIAL SERVICES V4.0

The **Relationship Tree** is a key example of how GaleForce CRM for Financial Services extends the core functionality of Microsoft Dynamics CRM.

The intuitive GaleForce Relationship Tree is based on the familiar Windows graphical “tree-based” structure, and provides users with a complete view of a client’s relationship with the financial institution, including their household, contacts, accounts, opportunities, activities, circle of influence and more. Custom relationships can also be mapped between contacts, companies and users, to show any relationships that exist between them.



**New in GaleForce CRM 4.0:** Dynamic modification of the Relationship Tree allows users to include richer display information such as photos, scanned business cards, PDFs of statements and other documents, data-driven graphics and more, as shown below.



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## Navigation and Customization

The Relationship Tree is accessible from the navigation bar of almost all entities. Four types of nodes appear in the Tree: root nodes, group nodes, child nodes and related child nodes.

The root node is the highest level node in a relationship tree from which all other nodes descend. There is only one root node per relationship tree. Group nodes provide a means to encapsulate related records such as contacts, addresses, activities, households, and financial accounts. Normally, group nodes are used to represent a one-to-many relationship between an entity whose record you are viewing and an entity represented by a group node. The constituent records of a group node (i.e. its immediate children) are known as child nodes. Related child nodes represent single records but do not belong to a group node. These nodes may be the immediate children of a root node, a child node, or another related child node.

The task of customizing relationship trees has been greatly simplified in GaleForce CRM 4.0 and can now be done entirely through the CRM user interface.

By leveraging this new customization interface, users now have a high degree of control over how things are displayed including the ability to select the entity (or entities) to customize, the type of nodes to affect, and specify the expression used to generate the text of those nodes. Advanced users familiar with HTML can also control the style and format of the text generated by the expression. This includes the ability to bold, italicize, underline, or change the font and font size of the text. Images such as JPGs and graphs may also be embedded and rendered in the tree. Users can also enter a numeric priority for their relationship tree node record and specify whether or not they wish to make a node visible on your tree.

## More Information

For more information on the Relationship Tree and other GaleForce CRM framework features, call 1-877-682-5855 ext. 110, or email [info@galeforcesolutions.com](mailto:info@galeforcesolutions.com).



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