

Related Tables

Many-to-many Relationships

Suppose you need a many-to-many relationship:

- A contact may have many opportunities.
- An opportunity may have many contacts.

Process

1. First create a Link to Selected Fields type entry with multiple values enabled in one table.
2. Then create a Related Table data type in the other table.
3. Result: The display looks the same in both tables though created by different data types.
4. If a record is created in the Related table, the bi-directional links are created automatically.

Many-to-Many Example

Here is what the resulting tables looks like.

First, here is a view of the "Opportunities" table shown in the Contact record of John Customer.

The screenshot shows a CRM interface for a 'Contact' record. At the top, there are tabs for 'Contact Information', 'Sales Progress', 'Opportunities', 'Activities', and 'History'. The 'Opportunities' tab is selected. Below the tabs, there are fields for 'ID' (413), 'Contact Table' (Contact), 'Date Created' (Apr 10 2013 08:42), and 'Date Updated' (Apr 10 2013 08:43). The main area displays a table of opportunities. The table has columns for 'Edit', 'ID', 'Opportunity Name', 'Company', 'Status', 'Sales Rep', and 'Sale Value'. One record is shown: ID 121, 'New Opportunity from IBM', 'IBM', 'Qualified', 'John Doe', and '\$450,000'. The interface includes 'Save' and 'Cancel' buttons and navigation arrows.

Edit	ID ↓	Opportunity Name	Company	Status	Sales Rep	Sale Value
<input type="checkbox"/>	121	New Opportunity from IBM	IBM	Qualified	John Doe	\$450,000

Next, here is what the "Additional Contacts" table looks like in an Opportunity record:

The screenshot shows a CRM interface for an 'Opportunity' record. At the top, there are fields for 'ID' (117), '*Opportunity Name' (GSA Government purchase), '*Company' (State of California), 'Sales Rep' (Junior Sales), 'Main Contact', and 'Status' (Qualified). The main area displays a table of additional contacts. The table has columns for 'Edit', 'ID', 'Full Name', 'Company', 'Email', and 'Direct Phone'. One record is shown: ID 413, 'John Doe', 'Agiloft', 'john.purchaser@agiloft.com', and '5554334:434'. The interface includes 'Save' and 'Cancel' buttons and navigation arrows.

Edit	ID ↓	Full Name	Company	Email	Direct Phone
<input type="checkbox"/>	413	John Doe	Agiloft	john.purchaser@agiloft.com	5554334:434