



Concentrix
a common centre

Assigning, Owning and Sharing Records in Microsoft Dynamics CRM

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Purpose

The purpose of this document is to provide insight into the options for assigning, owning and sharing records in [Microsoft Dynamics CRM](#).

This document is aimed at Microsoft Dynamics CRM project team members with either a technical or business interest in the solution. For a broader overview of the product, or for any other information about Microsoft Dynamics CRM, please [contact Concentrix](#).



Record Ownership

Most records within [Microsoft Dynamics CRM](#) have an owner and it is possible to grant security permissions to a user for a particular record based on who the owner is.

For example it is possible to allow a user to have access or additional permissions on records that they own, or that are owned by other users in their business unit.



Sharing Record Ownership

Whilst all records requiring an owner must have a single user identified as the main owner, it is possible to share record ownership with a team, or a number of users through use of the 'Sharing Menu'.

When in a specific record, the sharing menu can be found by clicking:
Actions -> Sharing

When a record is shared with a user or team, the relevant users are effectively seen by the system as being owners of the record and as such will receive the same permissions as if they were the primary owner of the record. It is possible to limit these permissions when adding them to Sharing Menu such as by specifying that they only have 'read' permissions.

When considering security of a record it is important to bear in mind that a user will only be able to carry out actions that their security role allows AND that are explicitly granted to them on the sharing record.

Example

Assume a specific user (User A) has the following permissions for all 'accounts' that they own:

Read
Write
Assign
Share

Also assume that a different user (User B) owns an account and shares it with User A specifying the following permissions:

Read
Write
Delete
Assign

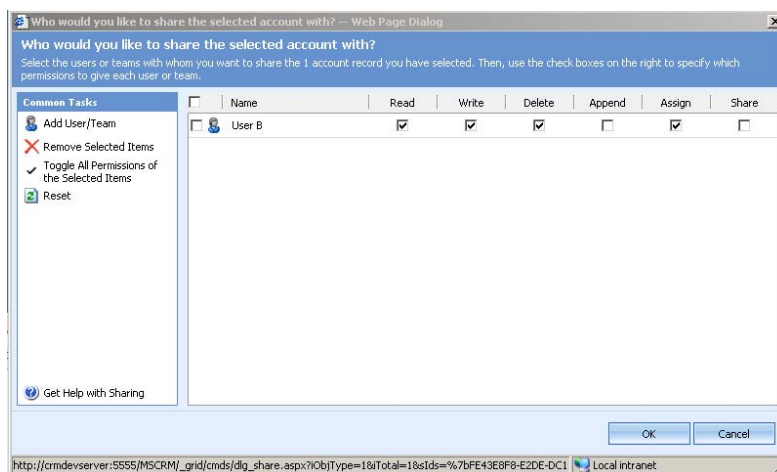


Fig 1: Sharing a record

User A is now effectively an owner of the account and they could potentially perform all the actions that they could normally perform on one of their own accounts. However, when User B set up the share he didn't give full control to User A and as such User A can only perform the permissions that: a) their security role allows AND b) that User B has explicitly included. Specifically User A can perform the following actions on the account:

Read
Write
Assign



User A cannot 'Delete' because their security profile does not allow them to delete records that they own, and they cannot 'Share' the record with other people because despite them being an effective owner of the record, the primary owner did not explicitly give this permission when sharing the account.



Assigning Records

There are two main ways to reassign records:

Manually – To reassign a record manually you should browse to an individual or list of records and choose 'Assign' from the 'Actions' menu, or select the 'Reassign' icon (below)



Fig 2: Assign Icon

Workflow – It is possible to set up an automatic or manual workflow rule that can reassign a record or list of records based on certain criteria.

A type of rule that is commonly used is one that looks at the postcode of an account when it is created, and based on the value, assigns the account to the relevant sales person.

Allow access to the Previous Owner

When re-assigning a record it is possible to automatically have the system share the record with the previous owner. The Concentrix support team can provide advice and guidance on changing this system setting.

Related Records

When a record is assigned to a new user certain related records can automatically be reassigned to the same user. This automatic assignment occurs based on the relationship type between the entity type of the record being assigned and the related entity.

It is possible to change the relationship type between most entities within Microsoft Dynamics CRM however it is highly recommended that you have a full understanding of the effects that this is likely to have, and it is strongly advised that you should discuss your aims with a Concentrix Support Engineer prior to using the reassign function or making any changes to relationships.

There are three main relationship types that we are concerned with:

1. **Parental** – In a parental relationship between two entities, any action taken on a record of the parent entity is also taken on any child entity records that are related to the parent entity record. For example, if you delete a record in the parent entity, the related child entity records are also deleted; or if you share a parent entity record, the related records from the child entity are also shared.
If the relationship between an account and its associated contacts was parental, when the account was reassigned from User A to User B, all of the associated contacts, irrelevant of who their owner is, would also be reassigned to User B.
2. **Configurable Cascading** - Any action taken on a parent entity record can also be applied to any child entity records that are related to the parent entity record. You can define the behaviour for each type of action. For example, you can set it up so that if you share a record in the parent entity, any related records for the child entity are not automatically shared. But if you delete a parent entity record, any related child entity records are automatically deleted.
For the assign function there are four cascading options:

- **Cascade All**

If the relationship between an account and its associated contacts was configurable cascading and the Assign option was set to 'Cascade All' then when the account was reassigned from User A to User B, all of the associated contacts,



irrelevant of who their owner is, would also be reassigned to User B. In addition this means that the owner will be updated on any contacts relating to this account who are inactive.

- **Cascade Active**
If the relationship between an account and its associated contacts was configurable cascading and the Assign option was set to 'Cascade Active' then when the account was reassigned from User A to User B, all of the active associated contacts, irrelevant of who their owner is, would also be reassigned to User B. In addition, this means that the owner will be not be updated on any contacts relating to this account who are inactive.
- **Cascade User-Owned**
If the relationship between an account and its associated contacts was configurable cascading and the Assign option was set to 'Cascade User-Owned' then when the account was reassigned from User A to User B, all of the associated contacts who are owned by User A would also be reassigned to User B.
In addition this means that the owner will be updated on any contacts owned by User A relating to this account who are inactive.
- **Cascade None**
If the relationship between an account its associated contacts was configurable cascading and the Assign option was set to 'Cascade None' then when the account was reassigned from User A to User B, none of the associated contacts would be reassigned.

- 3. Referential** - In a referential relationship between two entities, you can navigate to any related records, but actions taken on one will not affect the other. If the relationship between an account its associated contacts was referential, when the account was reassigned from User A to User B, the associated contacts would not be affected and would retain their current owner.

The examples above take account of the relationship between accounts and contacts, however it is important to note that there are actually many entities that have links to accounts, each with a specific relationship type.

By default, the following links are present between an account and other entities and could be affected by reassigning an account:

Related Entity	Default Relationship Type
Account	Parental
Appointment	Parental
Case	Parental
Contact	Parental
Contract	Parental
Email	Parental
Fax	Parental
Invoice	Parental
Lead	Parental
Letter	Parental
Note	Parental
Opportunity	Parental
Order	Parental
Quote	Parental
Service Activity	Parental
Task	Parental

Fig 3: Entities related to Accounts



Relationship Depth

Nearly all entity types in Microsoft Dynamics CRM have a similar list of relationships (to those shown in Fig 3) that link them to related entity types.

If a contact record is reassigned automatically because its parent account has been reassigned, this has a knock-on effect to all of the entities that are linked to this contact and as such the relationships between the contact and its related entities come into effect. This is shown in the example below and this starts to show how reassigning one record can have significant effects on seemingly unrelated records.

Example

If 'Account XYZ' is assigned from User A to User B and the relationship between an account and contact is 'Parental', then all of the contacts associated to 'Account XYZ' will also be reassigned to User B and likewise if there is a parental link between Contacts and Tasks, then all the tasks stored against the contact will also be assigned to User B.

Warnings Regarding Relationship Types

When selecting the most appropriate relationship type for the link between entities the following warnings should be seriously considered in reference to the effects that will come into play when reassigning.

- **Parental**
All related records of the relevant entity type will be assigned, irrelevant of their state (Active or Inactive) and owner. This could mean that completed activities, opportunities, cases will be reassigned.
- **Configurable Cascading: Assign: Cascade All**
All related records of the relevant entity type will be assigned, irrelevant of their state (Active or Inactive) and owner. This could mean that the completed activities, opportunities, cases will be reassigned.
- **Configurable Cascading: Assign: Cascade User-Owned**
All related records of the relevant entity type will be assigned providing that the owner matches the owner that is being changed. This may include completed activities, opportunities, cases etc.
- **Configurable Cascading: Assign: Cascade Active**
All related records of the relevant entity type will be assigned providing that they are active, irrelevant of who the owner is. This may include opportunities, cases, activities being reassigned to the new owner, even if they are being dealt with by someone other than the previous or new owner.
- **Referential; Referential – Restrict Delete**
There will be no effect on any related records of the appropriate entity type.

Important Note

Carrying out actions, even if they are indirect¹, on inactive or completed records can have undesirable and unexpected effects which may include dates being reset and data being altered.

¹ An example of an indirect action could be where a completed task against a contact automatically is reassigned due to an account being re-assigned where the relationship type between accounts and contacts is set to 'Parental'.



About Concentrix

Founded in 1999, Concentrix is a leading UK independent CRM specialist, providing quality business solutions to companies throughout the UK.

Concentrix implements [CRM software](#), systems and business solutions that are right for their customers' business requirements: matching their needs, goals and budget. Concentrix works across a wide variety of industry sectors with clients ranging from small companies with a handful of CRM system users, right up to household-name PLCs with hundreds of users on multiple sites.

Concentrix takes a 'product agnostic' approach to delivering CRM solutions to their clients. So, as well as Microsoft Dynamics CRM (which included [hosted Microsoft Dynamics CRM](#) as well as on-premise deployment) Concentrix offers a range of other CRM software solutions including [Sage CRM](#), Sage [SalesLogix](#), and FrontRange's [GoldMine](#).

Concentrix is a Microsoft Gold Certified Partner, a fully Accredited Sage Business Partner and a FrontRange Premier Partner.

Concentrix is based in Mountsorrel, Leicestershire and has satellite offices in Bristol and in central London. For further information about the information provided within this document, or any other products or services provided by Concentrix, please [contact Concentrix](#).



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