



Concentrix
a common centre

Microsoft Dynamics CRM v4 Introduction to Relationships

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Purpose

The purpose of this document is to provide information relating to how entities are linked within [Microsoft Dynamics CRM](#) and the various options that can be set.

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](#).



1 Introduction to Cascading Rules

Within Microsoft Dynamics CRM the relationships vary in type with some being hierarchical links whilst others are simply referential or even system defined.

This document is mostly concerned with hierarchical relationships and the options that we have in terms of being able to control the link between two entities.

Where there is the option for there to be a hierarchical link between two entities, this can potentially mean that actions taken on one entity record could have a direct effect on all related 'sub entity' records. This effect is defined by the type of relationship and the associated cascading rules.

Typically cascade rules can be triggered from a number of operations:

- Merge
- Share
- Unshare
- Assign
- Delete
- Reparent

There are five predefined cascade rule sets:

Type	Assign	Share	Unshare	Reparent	Delete	Merge
Parental	All	All	All	All	All	None
Referential	None	None	None	None	Remove Link	None
Referential, Restrict Delete	None	None	None	None	Restrict	None
Configurable Cascading	None	All	All	All	Restrict	None

1. **Parental:** All operations on the parent entity instance are propagated to the child entity instances (cascade all)
 - If the entity instance is deleted, its related entity instances will also be deleted.
 - If the entity instance is assigned to another user, its related entity instances will also be assigned to the other user.
 - If the entity instance is shared with another user, its related entity instances will also be shared with the other user.
2. **Referential:** Operations are not cascaded between entities (cascade none)
 - If the entity instance is deleted, only the link from its related entity instances is deleted.
 - If the entity instance is assigned to another user, its related entity instances are not affected.
 - If the entity instance is shared with another user, its related entity instances are not affected.
3. **Referential, Restrict Delete:** The entity instance can only be deleted if it has no related entity instances. Otherwise, this relationship type is the same as referential.



4. **Configurable Cascading:** Cascading rules can be configured for most actions. For system relationships, you can select the cascading rules for all actions except merge or delete. For custom relationships, cascading rules can be selected for all actions except merge. Cascading on merge is dependent on the referenced entity. If the referenced entity is an account, contact, or lead, the action cascades. Otherwise, it does not.
5. **System:** A parental relationship type automatically defined by Microsoft Dynamics CRM for system entity relationships. You cannot modify this kind of relationship

2 Microsoft Dynamics CRM Defaults

By default (out of the box) all of the configurable relationships are set to be parental which means that all of the different options are set to 'Cascade All'.

A number of issues have been raised with this approach and they include:

- When an account is reassigned, all opportunities, even those been worked on by different people, are reassigned to the new account owner.
- When an account is reassigned, all historic activity information (completed activities) are reassigned to the new account owner even though they weren't necessarily the user responsible for the activity.

As such, Concentrix has developed a new set of base rules which most all Parental links to be configured as Configurable Cascading relationships with the following settings:

Type	Assign	Share	Unshare	Reparent	Delete	Merge
Configurable Cascading	None	All	All	All	Restrict	None

Value can be modified

Value cannot be modified



3 Cascading Rule Options

For each of the cascading triggers that we can control (assign, reparent, share, unshare, delete) there are a number of cascading options to choose from. In most cases it is possible to choose from all of the options but there are some restrictions.

3.1 Generally Available Options:

- **None (N):** There will be no effect on the sub entity as a result of the relevant action.
- **Active (A):** Only active sub records will be affected as a result of the relevant actions.
- **User Owned (U):** Only sub records that are owned by the same user as the parent record will be affected as a result of the relevant actions.
- **All (Y):** All sub records, even those which are inactive or are owned by different users, will be affected as a result of the relevant actions.

3.2 Working Example 1

If we focus on the 'Account' entity and assume that for the sub entity 'contact' all options for all triggers are set to 'User Owned' the following actions would occur.

- **Assign:** When an account is assigned to a new user all of the contact records that belonged to the original user that are linked to the account will be reassigned to the new account owner.
- **Reparent:** When an account is moved to have a different parent account which itself has a different owner, all of the contacts that are linked to sub account and who are owned by the original owner will be reassigned to the owner of the parent account.
- **Share:** When an account is shared with a user/team, that user/team will be automatically given shared access to all of the contacts that are owned by the account owner and who are linked to the account.
- **Unshare:** When an account is unshared from a user/team, that user/team will be automatically removed from having shared access from all of the contacts that are owned by the account owner and who are linked to the account.
- **Delete:** When an account is deleted, all of the contacts who are linked to that account who are owned by the account owner will also be deleted from the system.

3.3 Working Example 2

In the examples below, assume a 'One to Many' relationship between Account and Contact.

3.3.1 Parental' Example:

- **Assign:** If we reassign the account to a new owner, all of the related contacts will be reassigned to the new owner.
- **Share:** If we share the account with a team, all of the related contacts will be shared with the same team.
- **Unshare:** If we unshared the account with a team, all of the related contacts will no longer be shared with that team.
- **Reparent:** If we change the parent record of the account, the new parent will have access to the contact records.
- **Delete:** If we delete an account, all of the related contact records will be deleted.



3.3.2 'Configurable Cascading' Example:

- **Assign:** If we reassign the account to a new owner, the contacts will retain their original ownership.
- **Share:** If we share the account with a team, all of the related contacts will be shared with the same team.
- **Unshare:** If we unshared the account with a team, all of the related contacts will no longer be shared with that team.
- **Reparent:** If we change the parent record of the account, the new parent will have access to the contact records.
- **Delete:** If we delete an account, the deletion will be prevented if there are related contacts.



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 a 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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