Establishing relationships between customer records that don't relate

With some customer records, establishing multiple relationships between records is not always possible. For example, with Microsoft CRM, you can specify a single contact record by using the Primary Contact field on the Account form. But what if you want to add additional contacts, which already exist in the system, to the Account form? You may come to the conclusion that the Account form does not have a place to add these additional contacts.

Actually, there is a feature to add these customer relationships that is known as relationship roles. Relationship roles give flexibility in creating relationships between Microsoft CRM records that cannot ordinarily be established. By using relationship roles, you can use existing records in Microsoft CRM to create a variety of relationships.

In this article, a fictitious company named Fabrikam will be used to illustrate how relationships can be managed in Microsoft CRM.

Relationships

Fabrikam is a small company that constructs single family homes. Fabrikam frequently contracts with a roofing company that is named Contoso, Ltd, to install roofs on many of the homes that Fabrikam builds. Contoso, Ltd is also a small company that employs many different individual sub-contractors to do the roof installations.

Fabrikam uses Microsoft CRM to manage and track business relationships. Fabrikam already has Contoso, Ltd defined as an account in Microsoft Dynamics CRM. However, Contoso, Ltd has as many as a half-dozen different sub-contractors that Fabrikam wants to track in Microsoft CRM. To do this, Fabrikam can use relationship roles and relationships.

Relationships help organise your customer associations in a meaningful way. Then, you can quickly search on relationships or create views to display account or contact records that have relationships with other accounts or contacts.

For example, by using relationship roles, Fabrikam can create entity relationships such as:

- One Contact to many Contact relationships
- One Account to many Contact relationships
- One Account to many Account relationships

Relationships are managed in **Relationships** under **Details** on Account, Contact, and Opportunity forms. Relationship roles are managed in the Settings area of Microsoft Dynamics CRM.

Define the relationship role

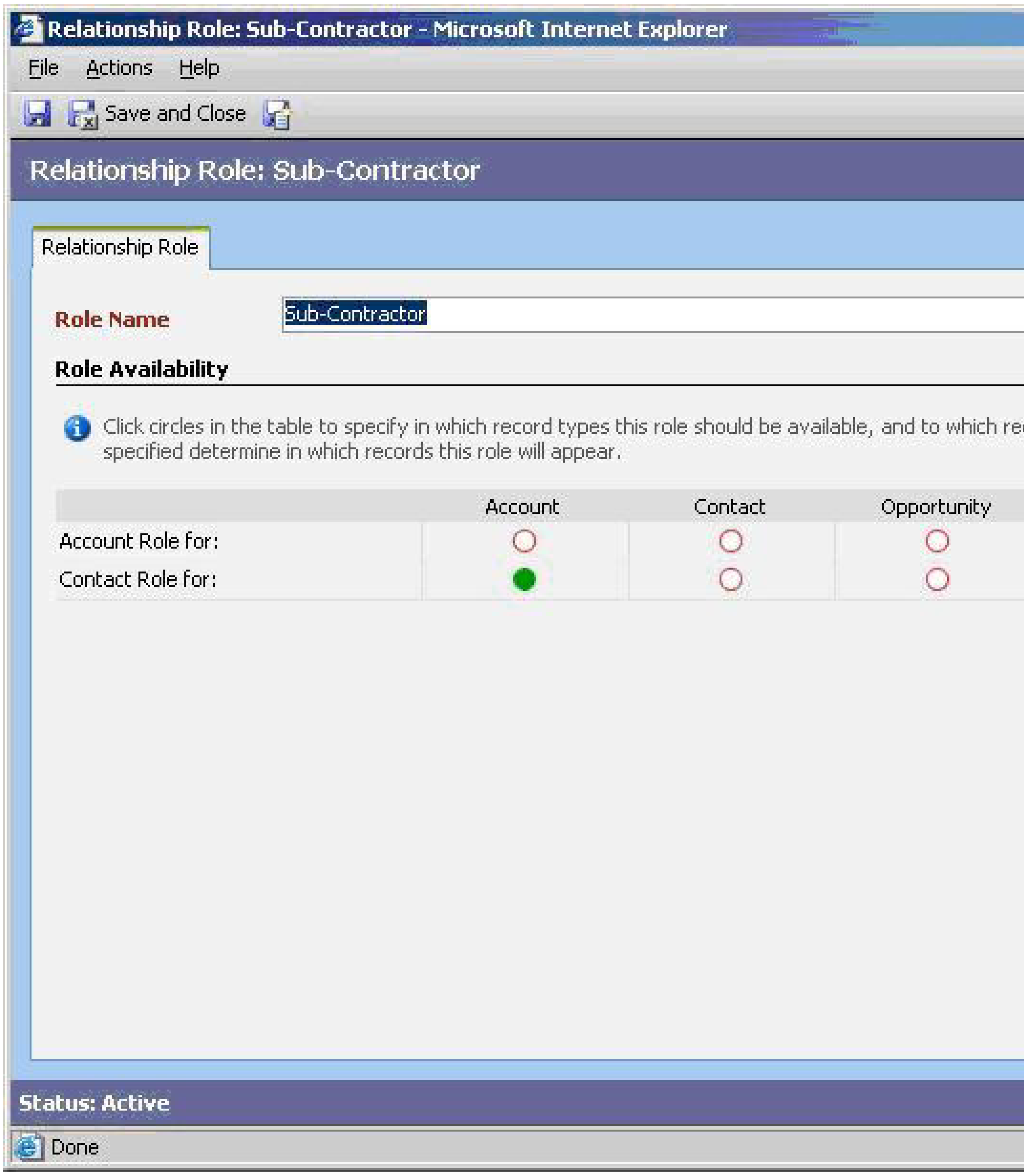
To add clarity to the relationship, you should define roles and include definitions. Notice that it is possible to establish relationships without defining any relationship roles. However, with these relationships, there will be no clear indication of the type of relationship. Therefore, it is often better to define relationship roles that include at least one role name and a description.

To create or edit a relationship role requires the Relationship Role privilege. By default, the Salesperson, Scheduler, and Marketing Professional security roles do not have this privilege. If you do not have the Relationship Role privilege, contact your system administrator or system customiser for assistance in setting up your relationship roles. For more information about privileges and security roles, see the Microsoft Dynamics CRM Help.

For this example, Fabrikam will create a sub-contractor relationship role to relate contact records that are individual sub-contractors to the Contoso, Ltd account. To define a relationship role, such as the sub-contractor role, follow these steps:

1. In Microsoft Dynamics CRM, click **Settings**. Under **Settings**, click **Settings**, and then click **Relationship Roles**.
2. On the **Actions** toolbar, click **New**, and then in the **Role Name** box, type *Sub-Contractor*.
3. In the **Role Availability** section, select the availability that you want. The availability determines the scope of the relationship role.

   To make the relationship role available only to contact-to-account relationships, in the **Account** column, click the circle in the **Contact Role for** row as indicated in the figure below. Selected circles are green in color. To widen the scope and make this relationship role available to other record types, click additional circles.

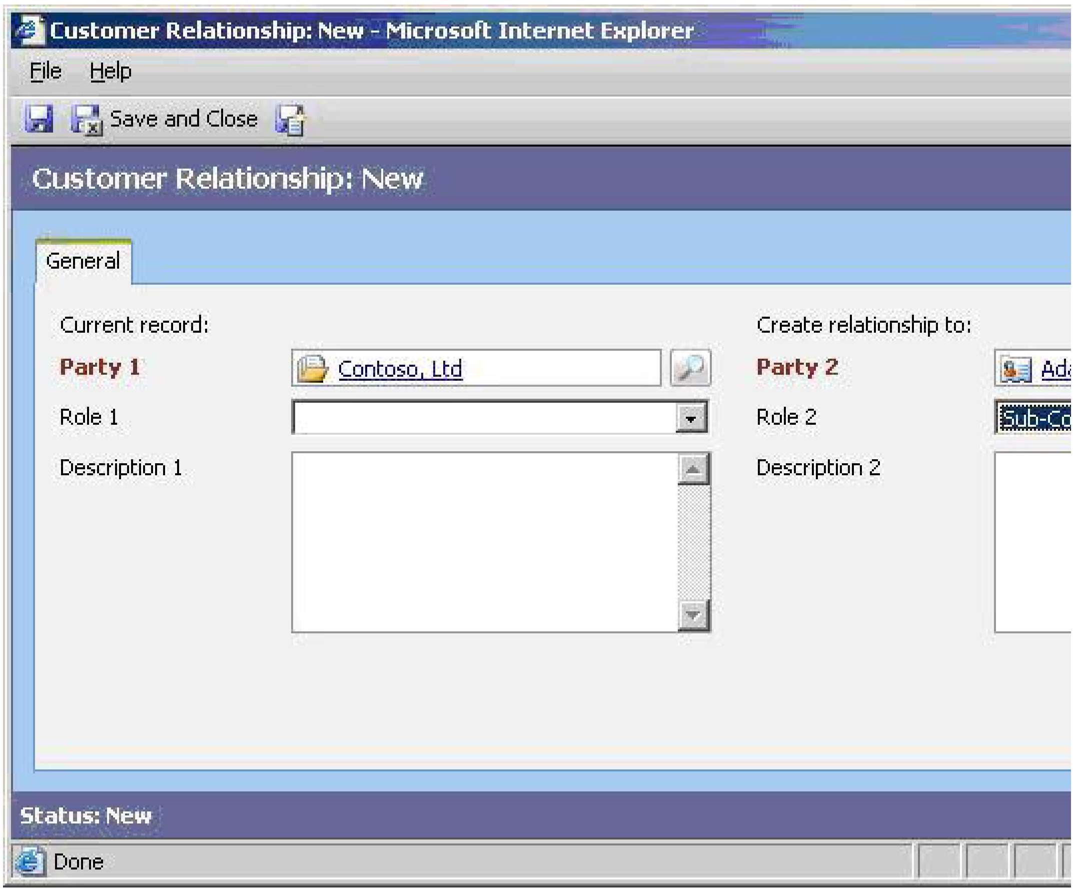


4. Click **Save and Close**.

Establish the relationships

To establish a relationship, follow these steps:

1. Open the account that you want, such as Contoso, Ltd.
2. Under **Details**, click **Relationships**, and then click **New Customer Relationship**. The Customer Relationship New form appears with the account name, such as *Contoso, Ltd*, already filled in the **Party 1** field.
3. In the **Party 2** box, click **Lookup**.
4. In the **Look Up Records** dialog box, in the **Look for** list, click **Contact**, select the contact record that you want, and then click **OK**.
5. In the **Role 2** list, select the role, such as *Sub-Contractor*, as indicated in the following figure.



6. Type a description for the relationship in the **Description 2** box, and then click **Save and Close**.

   Notice that a value was not selected for **Role 1**. To identify this account-to-contact relationship we need a link that only goes in one direction. If necessary, a relationship role can be created to identify a bi-directional relationship. For example, you might establish bi-directional relationship roles for doctor-to-patient relationships.

7. Click **Save and Close**.

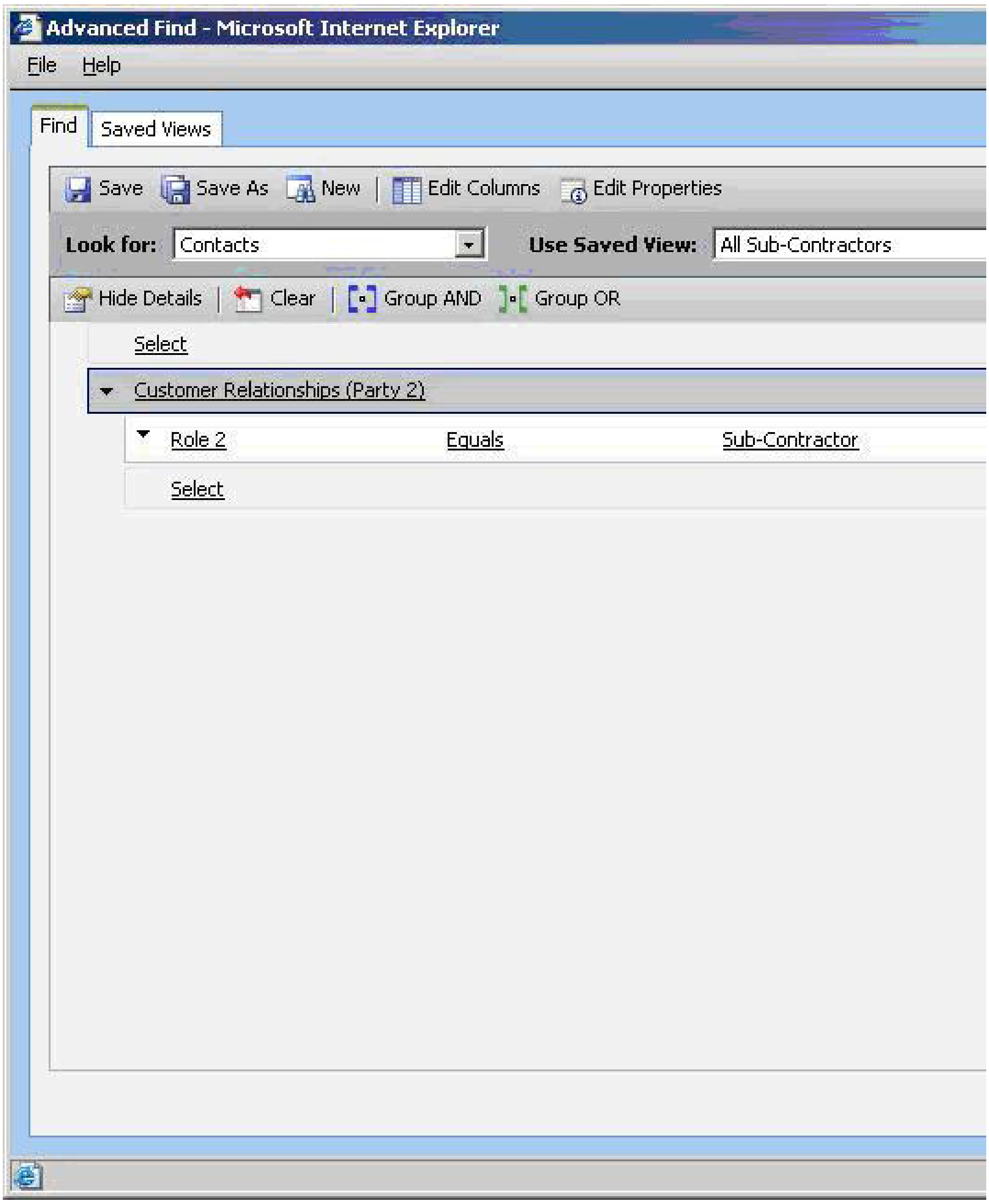
Create searches and views

As Fabrikam's business grows, more and more roofing contractors are added. To view all sub-contractors, you can create custom searches by using Advanced Find. Based on the results of the Advanced Find search, you can create views or run direct marketing campaigns.

To search for all contacts with the sub-contractor role, follow these steps:

1. On the **Standard** toolbar, click **Advanced Find**.
2. In the Advanced Find form, click **New**, and then in the **Look for** list, click **Contacts**.
3. Click **Select**, and under **Related**, click **Customer Relationships (Party 2)**.
4. In the next row, under **Customer Relationships (Party 2)**, click **Select**, under **Fields**, click **Role 2**, double-click **Enter Value**, and then in the **Look Up Records** dialog box, click **Find**.
5. In the **Available records** list, double-click the relationship role that you want, such as *Sub-*

. *Contractor* as indicated in the following figure, and then click **OK**.



6 Click **Find**.

. A list of contact records, such as a list of contacts that have the Sub-Contractor role association, is displayed.

To save the search, click **Back to Query,** click **Save As** on the **Form** toolbar, type a name in the **Name** field, such as *All Sub-Contractors*, and then click **OK**.

To share this search as a view in the Contacts area, follow these steps:

1. Click the **Saved Views** tab.
2. Click to select the view that you want, such as All *Sub-Contractors*, and then on the **More Actions** menu, click **Sharing**.
3. In the **Common Tasks** area, click **Add User/Team**, click **User** or **Team** in the **Look for** list, and then click **Find**.

4. Select the users or teams for whom you want this view available. To do this, in the **Available records** list, double-click the user or team that you want, and then click **OK**.
5. In the **Who would you like to share the selected view with** dialog box, select the permissions for each user or team. By default, the saved search is shared with **Read** permission. To give other users more than Read permission, select the check boxes for the other permissions you want them to have.
6. To close the **Who would you like to share the selected view with** dialog box, click **OK**, and then click **Close** on the **File** menu to close the Advanced Find form.