CITK

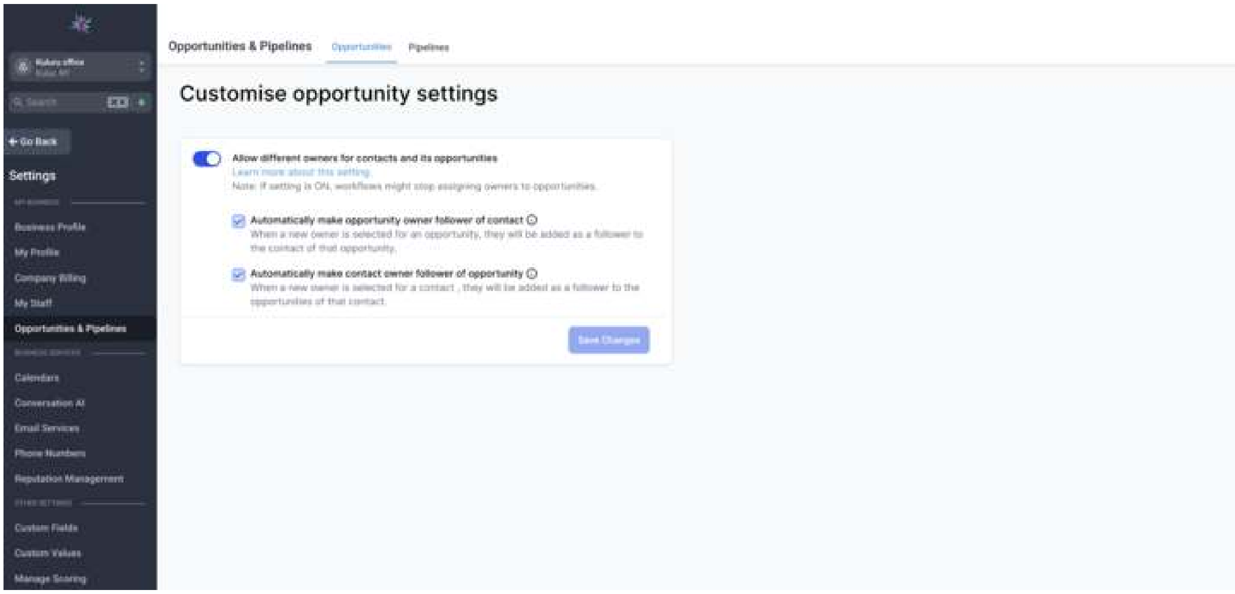
How to Decouple Owners for Contacts and Opportunities

With this new feature, you can now have separate owners for contacts and opportunities in your system. This flexibility allows for more nuanced management and delegation of responsibilities within your organization.

Enabling the Feature

To enable this feature, follow these steps:

1. **Navigate to Settings.**
2. **Find the "Allow different owners for contacts and its opportunities" option.**
3. **Toggle the setting to "On."**



Functionality

Both contacts and opportunities can have different owners once the toggle has been turned on.

Default Opportunity Owner: When creating a new opportunity, the default owner will be the same as the contact owner. However, this can be updated as needed to reflect the appropriate ownership.

Workflow Action (Coming Soon): Stay tuned for an upcoming workflow action that will enable further customization and automation with this feature.

Subsettings: There are two additional subsettings available -

- **Allow updating the contact follower based on the opportunity owner change:** Enable this setting to automatically update the contact follower when the opportunity owner is changed.
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How It Helps

- Improved Customization: Tailor ownership settings to match your organization's specific structure and workflows.
- **Efficient Communication:** Automatically update followers based on ownership changes, ensuring seamless communication and collaboration.

With the ability to decouple owners for contacts and opportunities, you have greater control and flexibility in managing your CRM.
