

Adding Or Removing Shared Owners

PlayMaker uses the terms "ownership" and "shared owner" to indicate assignment of Accounts, Contacts and Referrals. These records can have multiple users assigned to them, sharing the information on the records, as well as possibly sharing referral credit. Administrators and managers have the ability to assign and remove shared owners to accounts, contacts and referrals. This article provides an overview on adding or removing shared owners to records.

To add or remove a Shared Owner from an Account, Contact or Referral:

- Navigate to the appropriate category, by clicking on the *Accounts*, *Contacts* or *Referrals* link in PlayMaker.
- From the *Change View* drop-down, chose the view that shows all records.
- In the *Search* box on the left, search for the record (for more information on searching views, [click here](#)).
- Once the desired record is listed, check the box in the furthest left column for that record.

The screenshot displays the 'Accounts' page in PlayMaker. At the top right is a 'New Account' button. Below the title is a 'Change View' dropdown set to 'All Accounts', with links for 'Edit View' and 'Create New View'. A table lists five accounts, each with a checked checkbox in the 'ACTIONS' column and a 'View | Edit' link. The accounts are: ALTA BATES SUMMIT MEDICAL CENTER, BERKELEY PHYSICAL THERAPY INC, HERRICK CAMPUS PHARMACY, JANET P. LORD, M.D., A PROFESSIONAL CORPORATION, and NEURO WELLNESS. Below the table is a 'Display' dropdown set to '10' and '1-5 of 5'. At the bottom, a 'Bulk Actions' menu is open, listing options: Select Action, Merge Records, Delete Records, Remove Me, Mass Update, Assign Shared Owner, Remove Shared Owner (highlighted), and Request Ownership. The word 'Account' is partially visible at the bottom left, and a snippet of text 'You can use... tools to run mass changes or actions again' is visible at the bottom right.

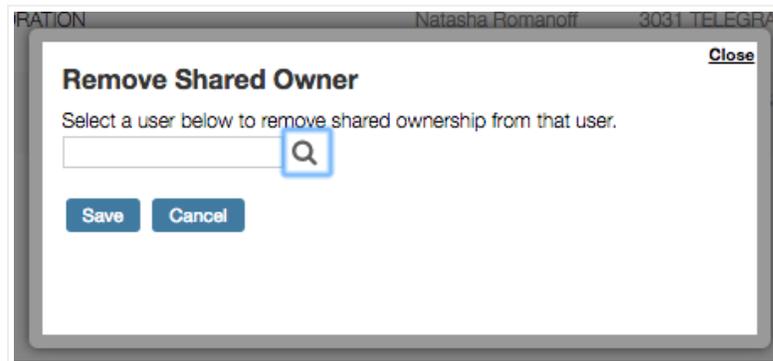
<input checked="" type="checkbox"/>	ACTIONS	NAME
<input checked="" type="checkbox"/>	View Edit	ALTA BATES SUMMIT MEDICAL CENTER
<input checked="" type="checkbox"/>	View Edit	BERKELEY PHYSICAL THERAPY INC
<input checked="" type="checkbox"/>	View Edit	HERRICK CAMPUS PHARMACY
<input checked="" type="checkbox"/>	View Edit	JANET P. LORD, M.D., A PROFESSIONAL CORPORATION
<input checked="" type="checkbox"/>	View Edit	NEURO WELLNESS

Display 1-5 of 5

Bulk Actions: Select Action
Merge Records
Delete Records
Remove Me
Mass Update
Assign Shared Owner
Remove Shared Owner
Request Ownership

Account
You can use... tools to run mass changes or actions again

- From the *Bulk Actions* drop-down, choose *Assign Shared Owner* or *Remove Shared Owner*, depending on the desired result.



- In the pop-up window, search for and select the shared owner to add or remove.
- Click *Save* to add or remove the shared owner.

Note: Using the *Assign Shared Owner* bulk action, users can assign records to themselves as long as their role provides proper access to do so. [This article](#) goes into more detail about role permissions.