## What Is A Relationship?

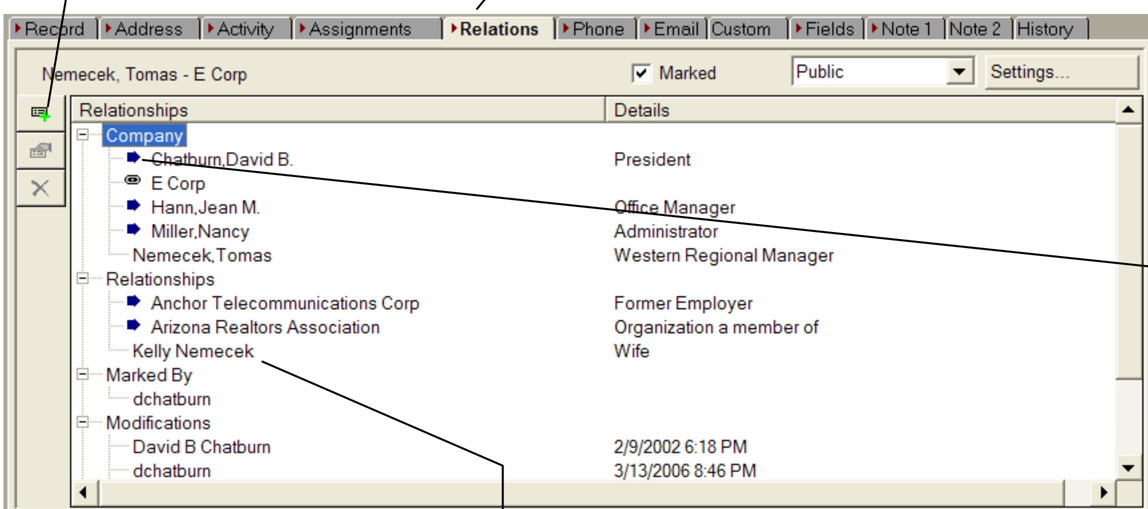
In ContactEase the Relationship Tab shows a variety of different things about this record and relationships to other records in the database as well as relationships to other ContactEase users.

The Relationship Tab shows:

1. *Company Relationships* – showing other contacts in the database where the company name is the same (identical)
2. *Relationships* – showing relationships to other contact records in the database
3. *Marked by* – showing other users who have this record 'marked' (if synchronized these records will be in those users Outlook folders)
4. *Modifications* – showing the names of each person who has modified this contact record and the date and time they last updated the record
5. *Created by* – showing the user, date and time this record was added

Click here to add a new User Relationship for this Contact.

The Relations tab is where you can create relationships to other records in the database or record non-linked relationships.




Some relationships are just informational and do not link to other records. Note the lack of a blue (link) arrow.

The blue arrow indicates that this is a link to another record in the database. Click on the arrow to display that record.

**Relationships**

All Relationships, except for #2 (Relationships) are automatic and occur then you do something in the database. For example:

| | |
|---|---|
| 1. Company Relationships – | Adding another contact with the same company name will automatically add that name to this list. |
| 2. Relationships – | See instructions below for adding a new Relationship for this Contact |
| 3. Marked by – | When a user links to this record (adding it to their Outlook) that user's name will appear in this list. |
| 4. Modifications – | Whenever a user edits this contact their name will appear in this list. If a user modifies the record multiple times, only the last date and time they edited the record will show. To see 'what' was changed, check the History Tab. |
| 5. Created by – | The date and time this record was added along with the user ID of the person entering the record appears. |

You can create a link between two records in the database. This is known as a relationship. In addition, the relationship feature can be used to identify connections to other names not in the database.

Relationship examples:

- Client is the former employee of another company
- Client's spouse or other relative
- Business relationship between clients
- Membership in significant organizations
- Parent/subsidiary company relationships

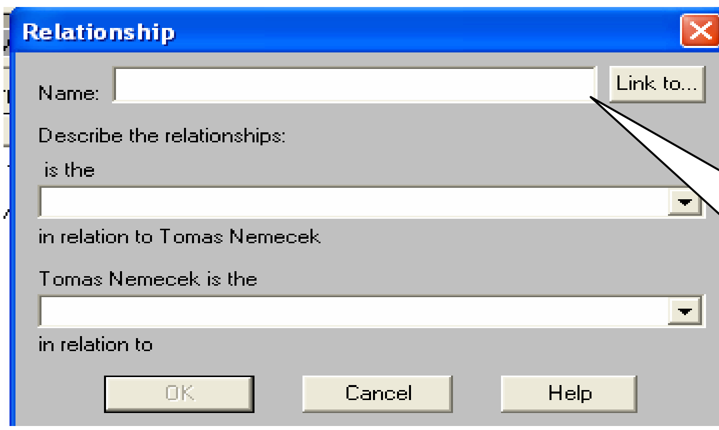
ContactEase allows you to create links to other records in the database; as well as define other types of relationships (without a record link). In addition, the relationship section of ContactEase tracks the following:

- Other contacts linked to the same company
- Which ContactEase User(s) have this contact in their Outlook "marked"
- Who added the record and the date it was added
- Dates and times and the user who edited the record

## Create a Relationship

**1)** Select the Relations tab, and click on the *New* icon. This will prompt the Relationship window.


The Relationship window allows you to enter the relationship information.




**2)** Type in a name, or click the *Link to…* button to choose an existing record.

## Linked Relationships

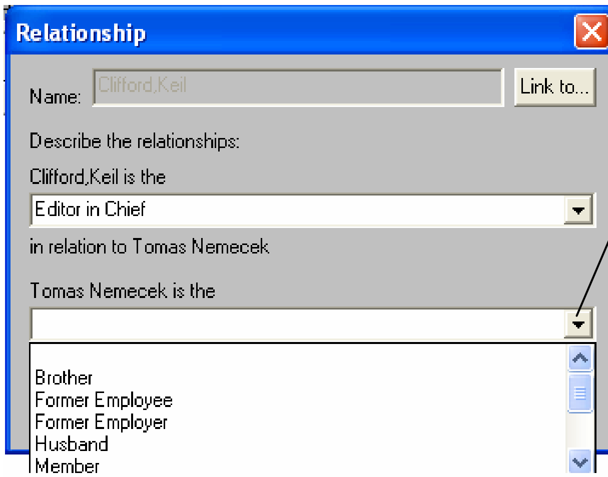
**3)** Click on the heading, and type in the Find section to locate the desired record to link.

If you click on the *Link to…* button, you can choose a contact record for the link.

Users can use the scroll bar, or the Find option to locate the desired record.

Select the desired record, and click the *OK* button to create a link.

The selected record now shows in the Relationship window. Now choose the relationship type for each record. Depending on how your system has been configured, you can choose from a pre-defined list, or add your own description. In this section, enter how the relationship record and contact relate to each other. Remember: The relationship does not have to be to an existing contact in the database. If desired, you can simply type in a name. If you link to an existing record, you must choose the name from the Link to Record window.




4) Select the relationship type from the drop-down list; or if permitted, type in the description.

The Choices in this list are stored in *Relationship: Description 1* (Choice List).

5) Choose the off-setting relationship; for example – Tomas is Keil's father, then Keil is Tomas' son. The off-setting relationship will show in the linked records Relationship tab.

Note: Unlinked relationships do not require an off-setting relationship since the unlinked record is not located in ContactEase.

END OF HINT!