

Relationships

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

The screenshot shows the 'Relationships' tab for a contact named 'Nemecek, Tomas - E Corp'. The interface includes a navigation bar at the top with tabs for Record, Address, Activity, Assignments, Relations, Phone, Email, Custom, Fields, Note 1, Note 2, and History. Below the navigation bar, there are fields for 'Marked' (checked) and 'Public' (dropdown), along with a 'Settings...' button. The main area is divided into two panes: 'Relationships' on the left and 'Details' on the right. The 'Relationships' pane is expanded to show a tree view with categories: Company, Relationships, Marked By, and Modifications. Under 'Company', there is a blue arrow pointing to 'Chaburn, David B.' and a list of other contacts including 'E Corp', 'Hann, Jean M.', 'Miller, Nancy', and 'Nemecek, Tomas'. Under 'Relationships', there are entries for 'Anchor Telecommunications Corp' (Former Employer) and 'Arizona Realtors Association' (Organization a member of). Under 'Marked By', there is an entry for 'dchatburn'. Under 'Modifications', there are entries for 'David B Chatburn' (dated 2/9/2002 6:18 PM) and 'dchatburn' (dated 3/13/2006 8:46 PM). The 'Details' pane shows the role for each relationship: 'President' for Chaburn, David B.; 'Office Manager', 'Administrator', and 'Western Regional Manager' for Nemecek, Tomas; 'Former Employer' for Anchor Telecommunications Corp; and 'Wife' for Kelly Nemecek. Callout boxes provide additional context: one points to a plus sign icon with the text 'Click here to add a new User Relationship for this Contact.'; another points to the entire Relationships pane with the text 'The Relations tab is where you can create relationships to other records in the database or record non-linked relationships.'; a third points to the 'Chaburn, David B.' entry with the text 'The blue arrow indicates that this is a link to another record in the database. Click on the arrow to display that record.'; and a fourth points to the 'Anchor Telecommunications Corp' entry with the text 'Some relationships are just informational and do not link to other records. Note the lack of a blue (link) arrow.'

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

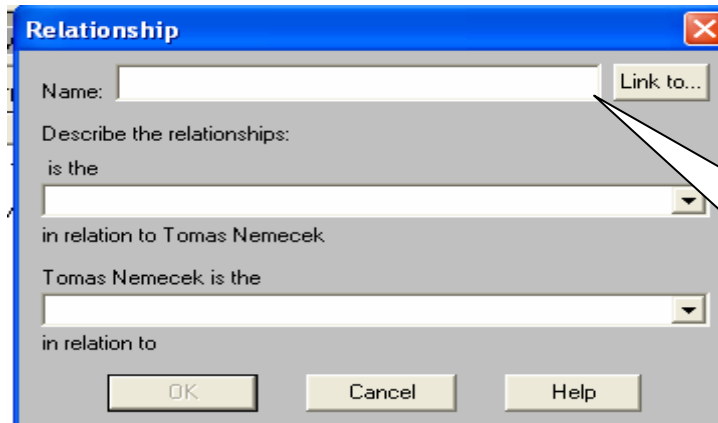
Relationships

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.

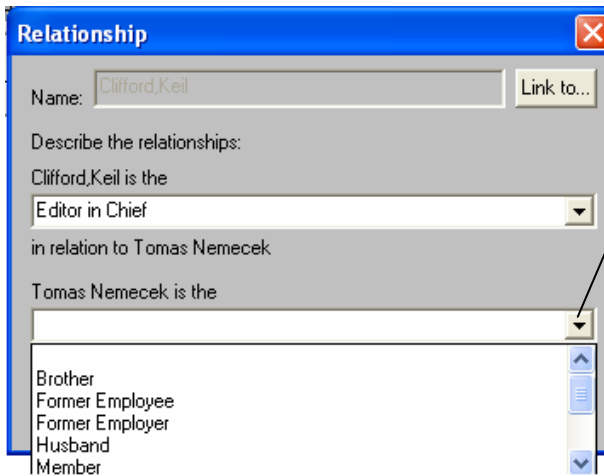
Users can use the scroll bar, or the Find option to locate the desired record.

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



Relationships

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!