Fast-Class File

Client Data System

Volume 125: Creating Key Relationship Definitions

To create custom Key Relationship definitions:

- Open a contact record and click on the **Key Relations** tab.
- Click on the **Add Record** button in the **Key Relations Summary** section.

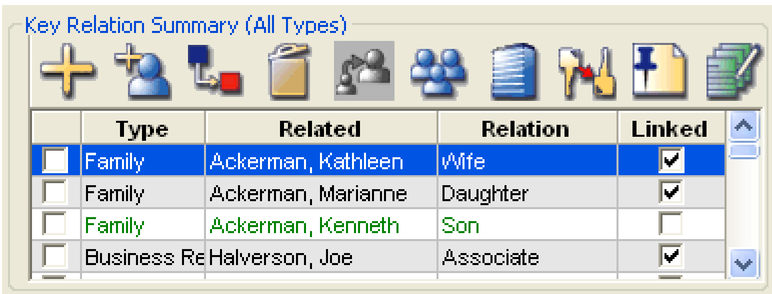

Figure 1: The Key Relations Summary section of the Key Relations tab

- Search for and select a contact to link to the contact record in focus.
- Click on the **Relationships** button in the **Define Relationships** window.

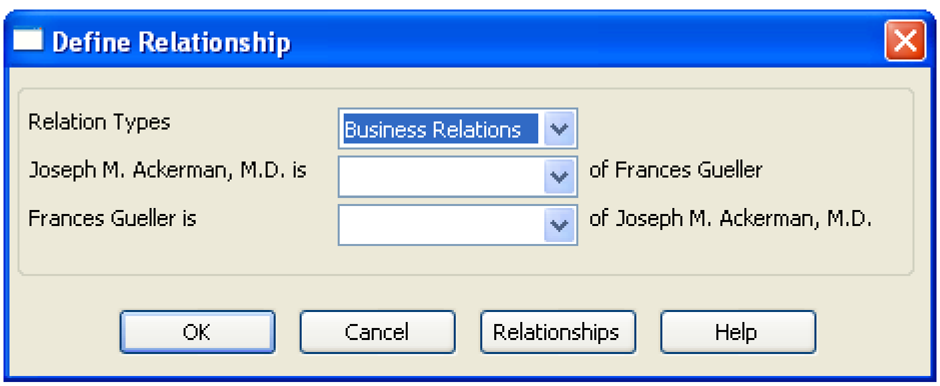

Figure 2: The Define Relationship window

- The **Relationship** summary screen will display with a list of all available relationships.
- Click the **Add Record** button.
- The **Relationship Definition** window will open.

Figure 3: The Relationship Definition window.

- Use the **Relationship Type** Drop-down to select from Family, Business, or Personal Relationship types.
- Define the relationship of the selected Contact to the linked contact in the **Source Relationship** field.
- Define the relationship of the linked Contact to the selected contact in the **Target Relationship** field.
- After defining the new relationship, click **OK**.
- Click the **Add Record** button to launch another **Relationship Definition** window.
- Create the inverse relationship to the relationship created in the first **Relationship Definition** window.

Figure 4: The Relationship Definition window (inverse relationship).

- After defining inverse relationship, click **OK**.
- Refresh the **Relation Types** drop-down by selecting a type other than the one used with the new definition, and then select the type used with the new definition.
- The new relationship definitions will be available in the relationship drop-down fields.
- Create the relationship. Click **OK**.
- The contact records will be linked in the **Key Relation Summary** section of the **Key Relations** screen with the new relationship.