Fast Class File

Client Data System

Dependent Contact Promotion

A dependent record is a record that exists primarily as supporting information to an independent or full contact record. In that sense a dependent record is dependent on a full contact record.

As a general rule of thumb, dependent records are an excellent way to track family members of contacts. Once family members with dependent records become prospects or clients, it's a good idea to promote the dependent contact records to full contact records to ensure that the records show up in dynamic reports, filtered searches, and mass correspondence campaigns.

Promoting a Dependent Record:

- Open the contact record that the dependent record is dependent on.
- Select the Key Relations tab.
- Select the contact record to be promoted in the Key Relation Summary.



Figure 1: The Key Relation Summary on the Key Relations tab of a Contact record.

- Tag the dependent record (displayed in green) to be promoted.
- Click the Change Record button in the Key Relation Summary.

Key R	elation Summ	hary (Family)	9 🗐 🙌	F	1
	Туре	Related 🔨	Relation	Linked	<u>^</u>
	Family	Ackerman, Kathle <mark>, ^{Char}</mark>	nge Record		
	Family	Ackerman, Marianne	Daughter		
	Family	Ackerman, Kenneth	Son		
					~

Figure 2: The Change Record button on the Key Relation Summary.

- Confirm the record conversion when prompted by CDS.
- The dependent contact record will be promoted to a full contact record and linked to the original full contact record in the **Key Relations** tab.

Once a dependent contact has been promoted to a full contact record, it will be displayed in black in all summary screens.

Turn Off the Display of Dependent Records:

- Select **Database** in the main menu bar.
- In the Database menu, select Modify Current User's Profile.
- Select the **Contact Options** tab.
- Clear the Show Dependents option in the **Contact Record Options** section.

T TOTY LINE	Things Done	Misc. Information	1	120
ersonal Information	Security Information	Contact Options	Activity Options	Policy/Investment
Contact Record Options Automatic Set Valid Show Dependents Show Agents Show Business Show Group Censu Check Duplicate Co Assign New Contactors Show Indicators	dation J us ontacts/Business cts to Current User	SmartPad Option Automatic Delete Link Smartpad atta Posting Option Calendar a Dials Made Individual E-mail Mes Address/P	Add Mode when opened ked SmartPad Postings achment size limit (MB)	5
Indicator Options	VI ottors		Show Sets ComboB	lov
Activities	Key Relations	✓ Investments	Show Filter Combol	Box

Figure 3: The Show Dependents option in the User Profile.

• Click OK to close the User Profile.

Remember, after making a change to the **User Profile**, you will need to log out of CDS and log back in for the changes to take effect.

Important: Even if you turn off the **Show Dependents** option in the **User Profile**, you will still be able to view dependent records in the **Key Relations Summar**y of the **Key Relations** tab.