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**.

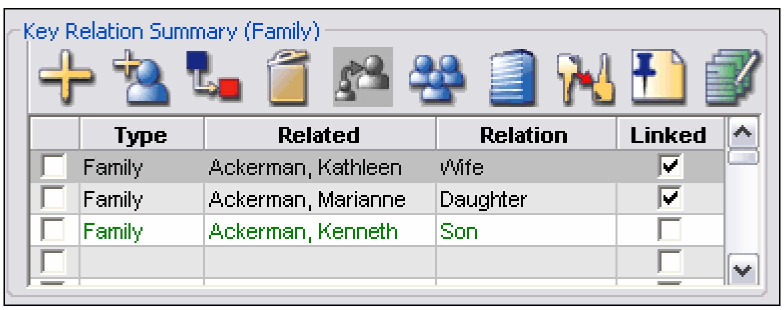

Figure 1: The Key Relation Summary on the Key Relations tab of a Contact record.

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

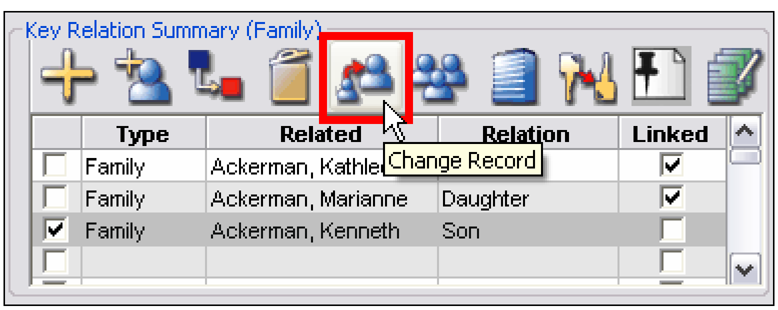

Figure 2: The Change Record button on the Key Relation Summary.

- 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.

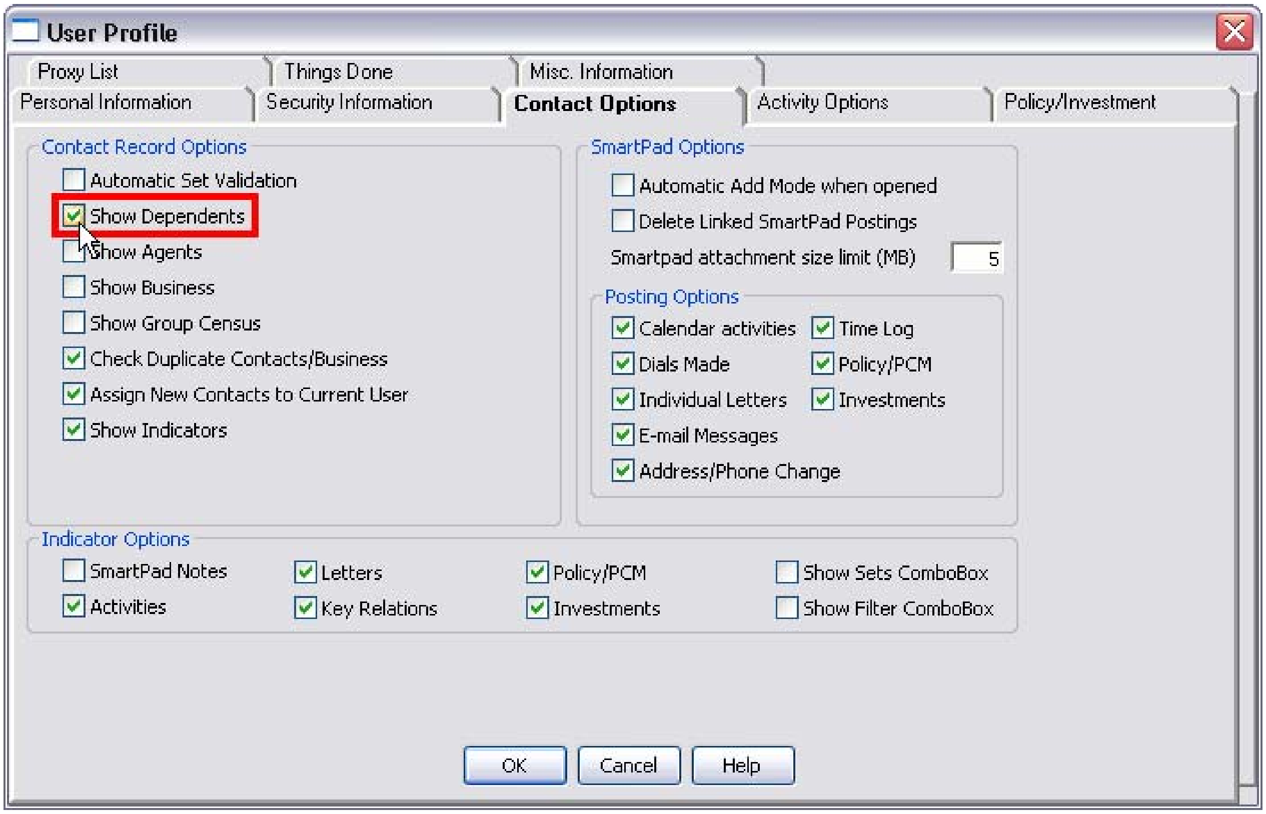

Figure 3: The Show Dependents option in the User Profile.

- 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 Summary** of the **Key Relations** tab.*