Fast•Class File

Client Data System

Volume 32: 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.

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	Туре	Related	Relation	Linked 🔺	First Name/MI	Kathleen		_
	Family	Ackerman, Kathleen	Wife	v	Greeting/Title	Katie	Mrs.	
	Family	Ackerman, Marianne	Daughter	M	Job Title			
	Family	Ackerman, Kenneth	Son		Occupation	Architect	2122	
	Business Re	e Halverson, Joe	Associate		Birthdate/Age	05/08/1955		46
	3		8		Gender/Tobacco	Female 💌	No	-
				_	I SS#	550-76-3111		_
1151	ness Belati	ons			Income/Tax			_
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	B	usiness	Role	A	1			
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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.

Define Relationship	×
Relation Types Joseph M. Ackerman, M.D. is Frances Gueller is	Business Relations Image: of Frances Gueller Image: of Joseph M. Ackerman, M.D.
ОК	Cancel Relationships Help

Figure 2: The Define Relationship window (Relationship button highlighted).



• The **Relationship** summary screen will display with a list of all available relationships.

Relationship (41)		
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Relation	With Male	With Fernale	Relationship Type
Associate	Associate	Associate	Business Relations
Aunt	Nephew	Niece	Family
Brother	Brother	Sister	Family
Brother-In-Law	Brother-In-Law	Sister-In-Law	Family
Cousin	Cousin	Cousin	Family
Daughter	Father	Mother	Family
Domestic Partner	Domestic Partner	Domestic Partne	e Family
Employee	Employer	Employer	Business Relations
Employer	Employee	Employee	Business Relations
Ex-Husband	Ex-Wife	Ex-Wife	Family
Ex-Spouse	Ex-Spouse	Ex-Spouse	Family
Ex-Wife	Ex-Husband	Ex-Husband	Family

Figure 3: The Relationship summary screen.

- Click the Add Record button.
- The **Relationship Definition** window will open.

		Use the
Relationship	×	Relationship Type Drop-down to select from Family.
Relationship Type	Business Relations	Business, or Personal Relationship types.
Source Relationship	Legal Client	Define the
With Male	Lawyer	relationship of the selected Contact to the linked contact in
With Female	Lawyer	the Source Relationship field.
ОК	Cancel Help	Define the relationship of the linked Contact to the selected contact in
Figure 4: The Relationshi	p Definition window.	the Target

- 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.

Relationship	×
Relationship Type	Business Relations
Source Relationship	Lawyer
– Target Relationship	,
With Male	Legal Client
With Female	Legal Client
OK	Cancel Help

Figure 5: 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.

Business Relations 💌
Legal Client of Frances Gueller
Lawyer of Joseph M. Ackerman, M.D.
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Figure 6: The Define Relationship window (Contacts linked with new relationship definition).

• The contact records will be linked in the **Key Relation Summary** section of the **Key Relations** screen with the new relationship.