April 9, 2004

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.

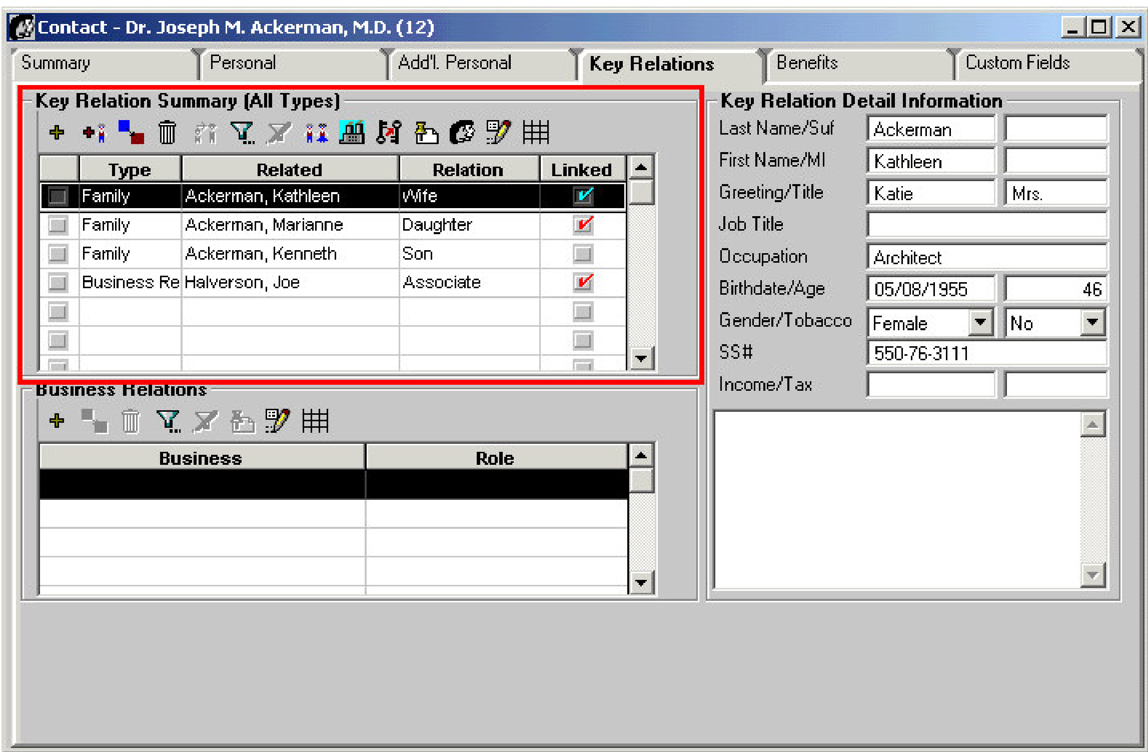


Figure 1: The Key Relations Summary section of the Key Relations tab.

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

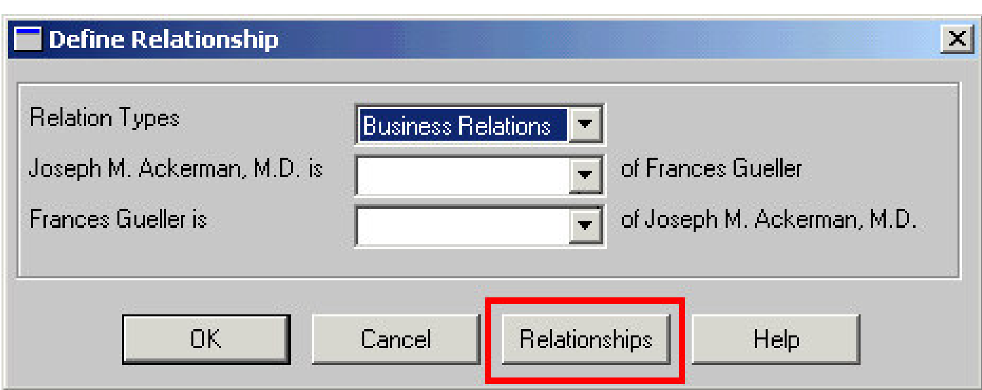
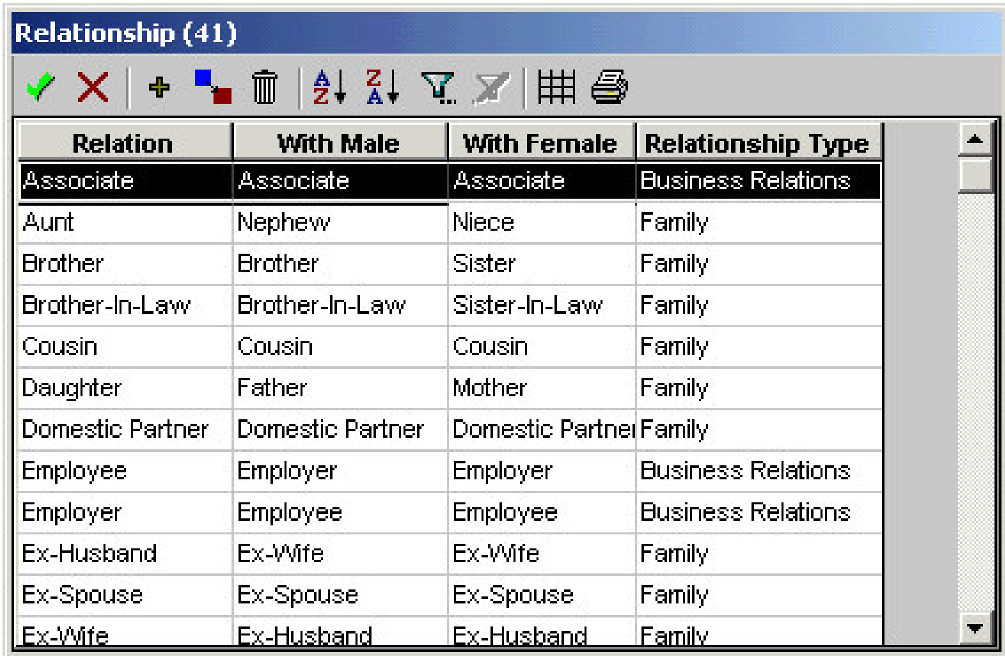


Figure 2: The Define Relationship window (Relationship button highlighted).

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



Relation	With Male	With Female	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 Partnei	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 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.

Figure 4: The Relationship Definition window.

- 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 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**.

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.