

# Understanding & Managing Relationships

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## Donor Management System

### Understanding Relationships

Your DMS allows you to configure relationships between Contacts, such as “Employee of Company X” or “Household member of Household Y”. Relationships can be set as follows:

- Individual to Individual
- Individual to Organization
- Individual to Household

These, while entirely optional, can be beneficial in ensuring better reporting, more efficient and cost-effective communication (e.g.: not mailing three appeals to the same address!) and more nuanced Contact segmentation.

### Adding a Relationship to a Contact

1. On the **Contacts Tab**, search for the desired Contact and select their name to be brought to their Contact Profile

Find your Contact

2. Select either the (1a) **Relationships subtab** and then on (1b) **Add Relationship**; or the (2a) **Actions menu** in the top-right and then on (2b) **Add Relationship**

Under your desired Contact's Profile, select **Actions > Add Relationship**

3. In the popup window that will appear, fill out the relevant details and **Save Relationship** when ready:

- **Relationship Type:** the type of relationship your Contact is associated with (e.g.: “Child of”, “Sibling of”, “Employee of”, etc.)
- **Contact(s):** the Contact in your DMS this Contact is related to
  - **If Individual Contact:** type either only “Last name”, only “First name”, or for a full name type “Last name, First name”
  - **If Organization Contact:** type the full or partial name of the Organization
  - **If Household Contact:** type the full or partial name of the Household.
- **Start Date/End Date** (e.g.: “Employee of”): aids in keeping a record of present/past Relationships

- Setting an **End Date** in the past will switch the Relationship to the **Inactive Relationships** panel.
- Likewise, an **End Date** that has been passed will change the Relationship to **Inactive**.
- **Description/Note:** provides additional information to the Contact's Relationship
  - These are not searchable fields and should not be used as a tracking tool

Fill out the necessary fields to add the Relationship

## Managing an Existing Relationship

Once a Relationship has been established between one or more Contacts, it can be viewed, modified or deleted from the Contact's Profile Page.

### Editing a Relationship

1. In a Contact's profile, under the **Relationships** tab, navigate to the specific Relationship you want to edit and select **Edit**

You can Edit each individual Relationship related to the Contact

2. In the **Edit Relationship for (...)** popup window, make the necessary changes to this Contact's Relationship and select **Save Relationship**:

Modify all the necessary information

#### Note:

- Editing an **End Date** as a date in the past will switch the Relationship to the **Inactive Relationship** panel.
- Likewise, an **End Date** that was initially set in the future but has now been met/passed will change the Relationship to **Inactive**.

### Disabling or Deleting a Relationship

1. In a Contact's profile, under the **Relationships** tab, navigate to the specific Relationship you want to disable or delete

Relationships subtab

2. Next to the specific Relationship you want to disable/delete and **select More**



3. Then select either **Disable** or **Delete** and confirm your action in the accompanying pop-up window.



4. Once confirmed, the Relationship will then be displayed under the **Inactive Relationships** panel.

- **Note:** While you can enable a disabled Relationship at any time by selecting **More** once again and then **Enable**, you cannot retrieve a deleted Relationship.



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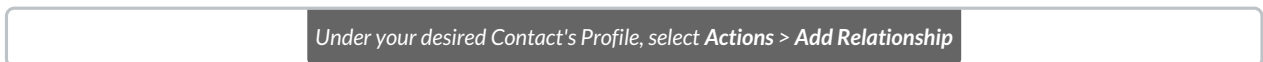
## Adding a New Relationship Type

You're also able to create custom Relationship Types in your DMS to further segment your Contact's Relationships.

1. On the **Contacts Tab**, search for the desired Contact and select their name to be brought to their Contact Profile



2. Select either the (1a) **Relationships subtab** and then on(1b) **Add Relationship** ; or the (2a)**Actions menu** in the top-right and then on (2b) **Add Relationship**



3. In the **Add Relationship for (...)** popup, select the "wrench icon" to the right of **Relationship Type**



4. A new popup window will provide suggested Relationship Types, along with the ability to Edit or Delete each of them.



5. Otherwise, to add an entirely new Relationship Type, select the **Add Relationship Type** button at the bottom right corner of the screen.



Create new Relationship type

6. Fill out the details of your new Relationship type and select **Save**.



Add details for your new Relationship type