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***

Select the 3 dot menu

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

*Select **Disable** or **Delete***

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.

Inactive Relationships

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

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

Add new Relationship type

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

Suggested Relationship Types

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