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Overview

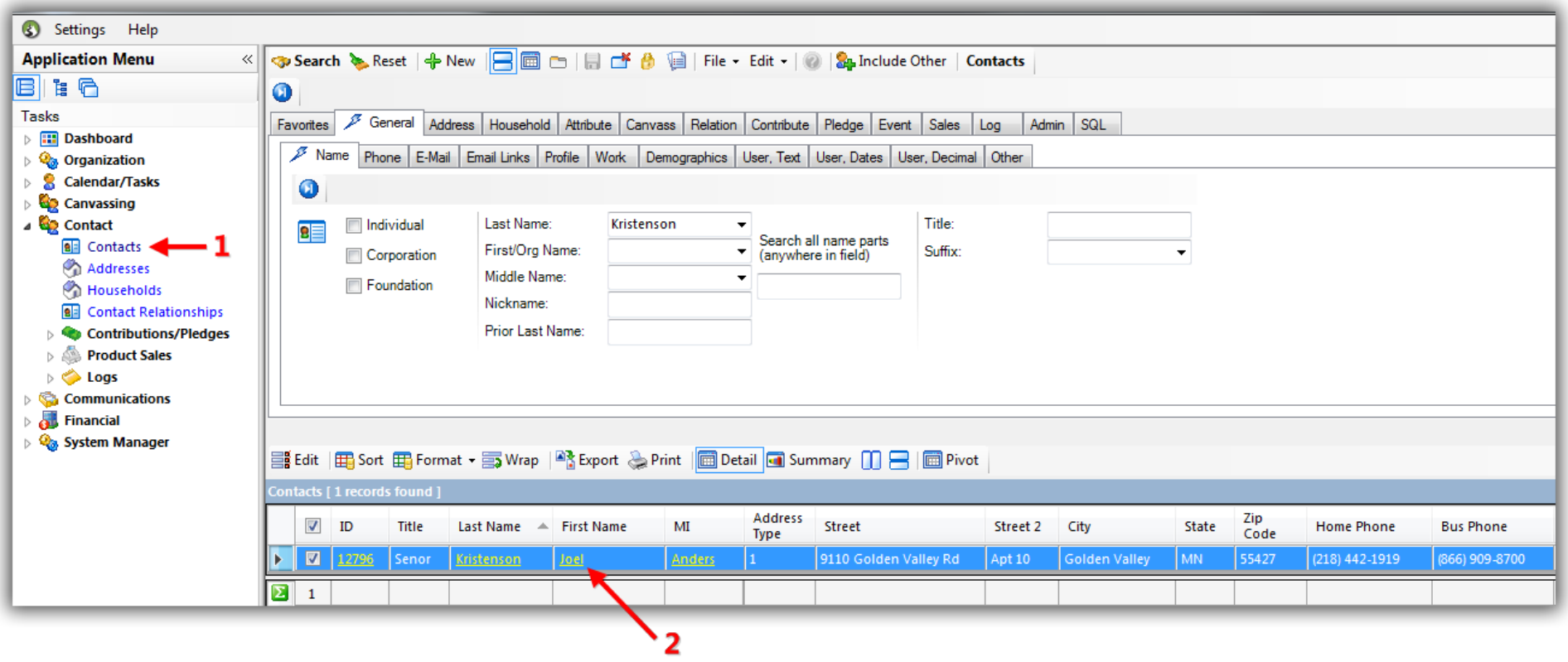
There are **two** ways you can **create your own relationship types**; either from within a contact's record card, or from the **Relationships** list. This article walks through both.

This feature was built in 2016 after an organization had needs for many more types than our system defaults provided—it used to require each new type was manually created by a support tech.

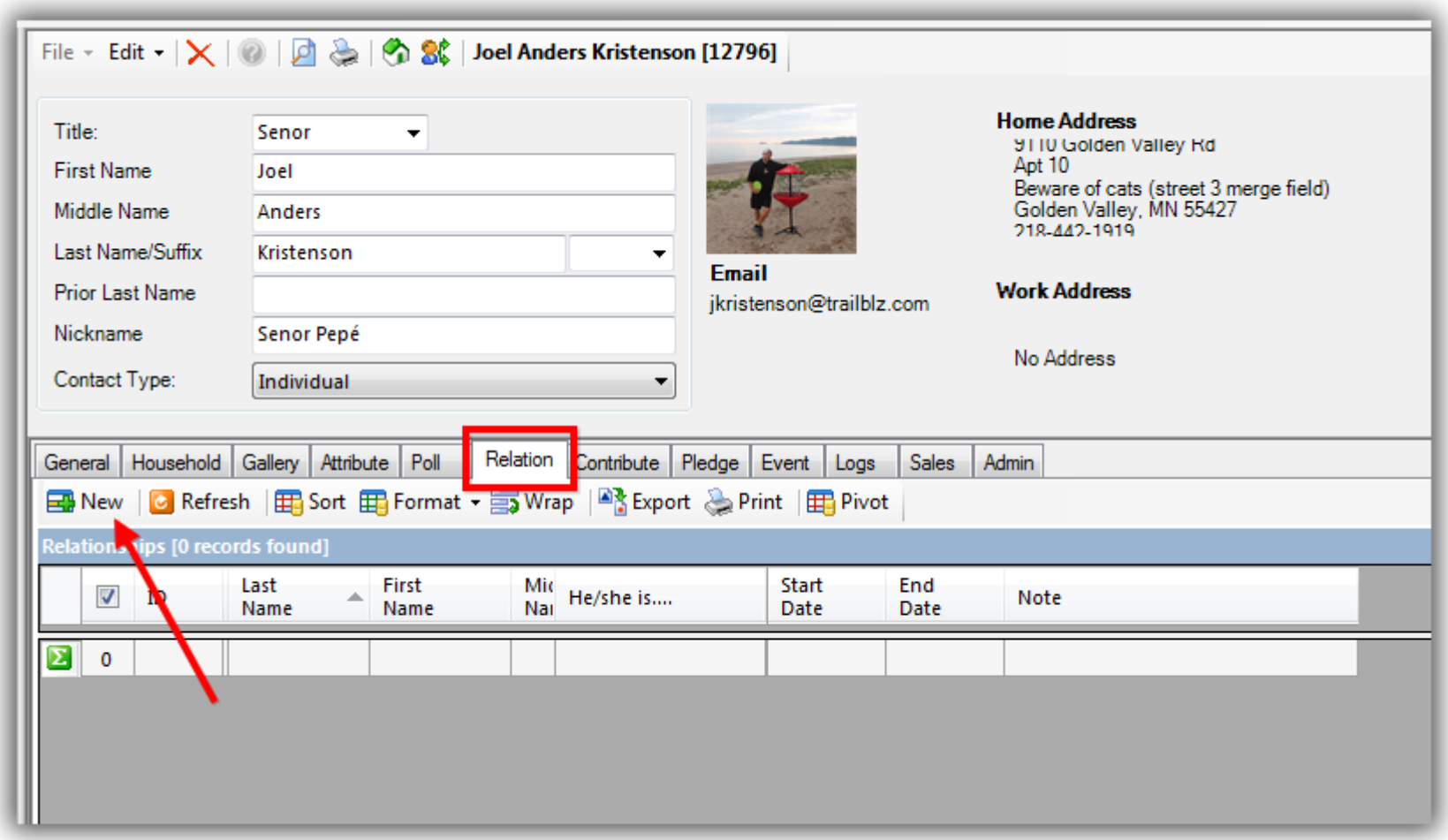
Tip: Learn more about the relationship management feature by reading this help article. It covers things such like **searching** with relationships, for instance, pulling a list of a business and all of its employees.

Steps – From Within A Contact Record Card

1) Search for any contact in your database and open their record.

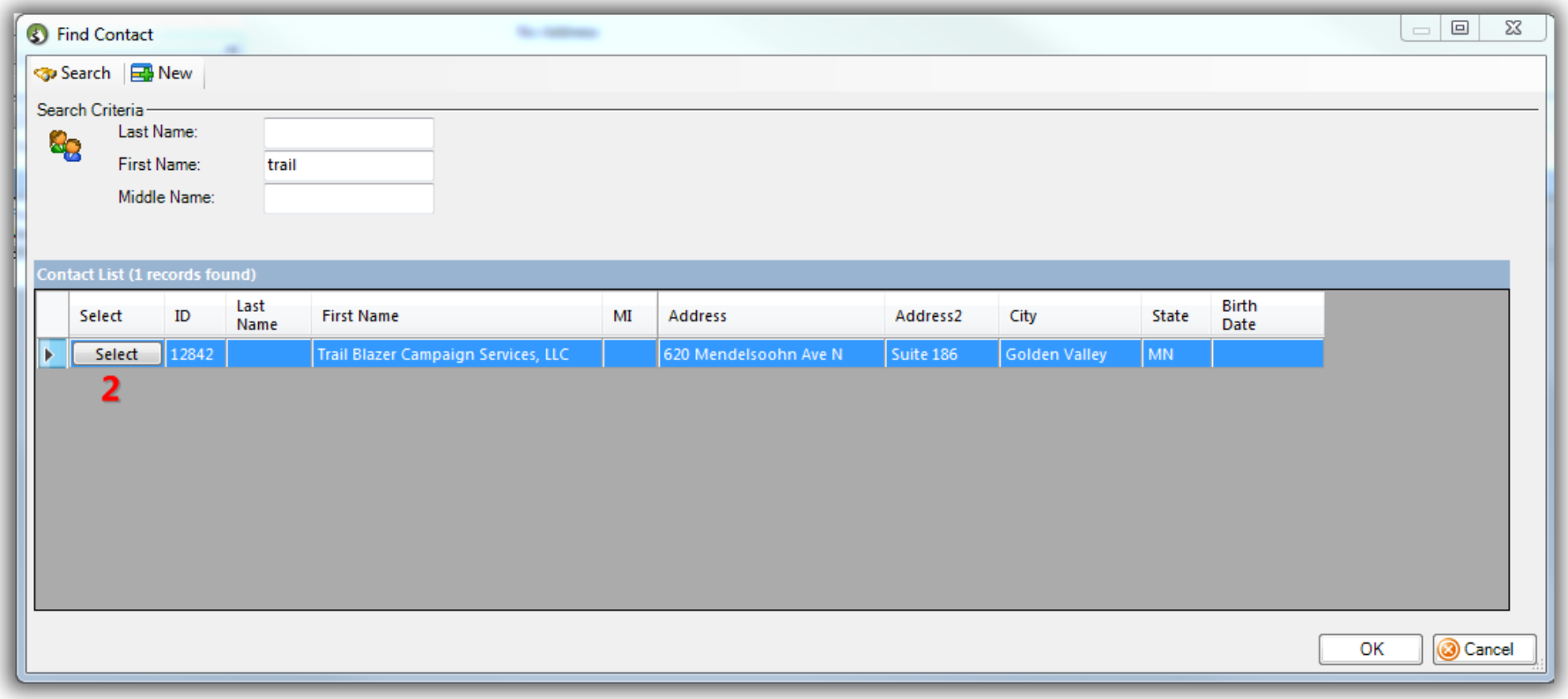


2) Navigate to the **Relation** tab and click **[+ New]**.



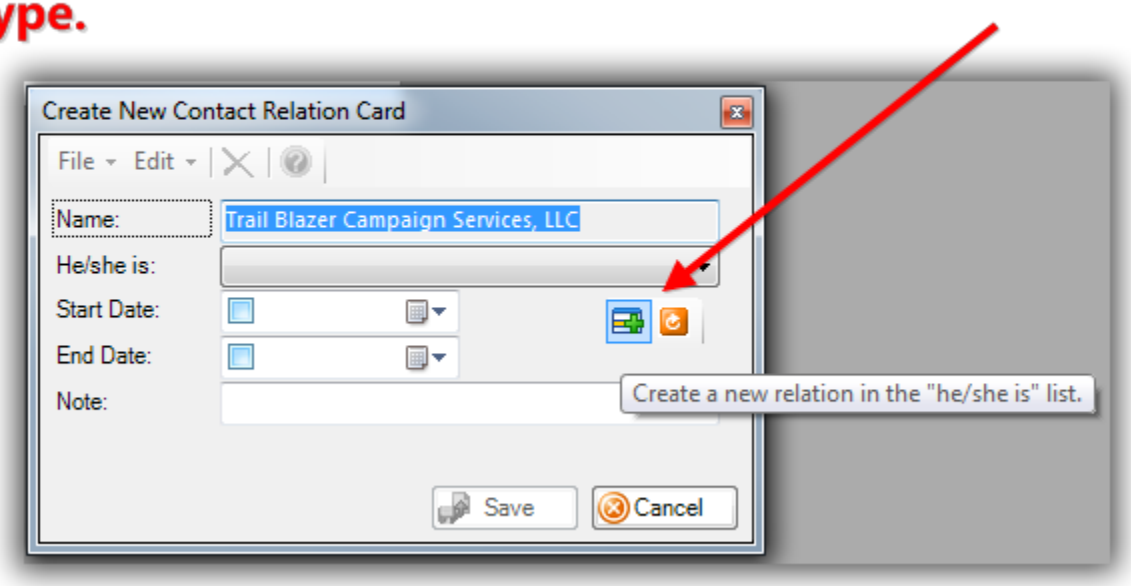
3) Search for and select the contact you want to add a relationship for or click **[+ New]** if they aren't in your database yet.

1. Search for the contact you want to connect with a relationship or click [+ New] if they don't exist.



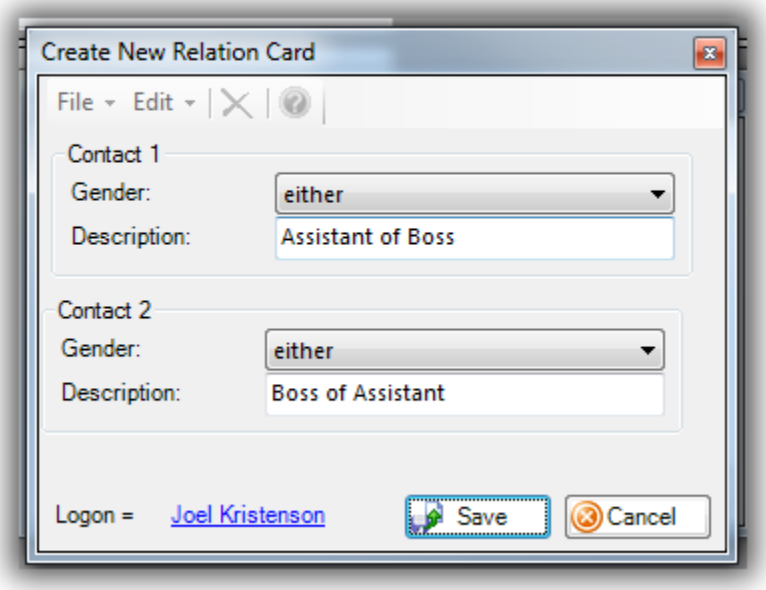
4) To add your own relationship type click the little green **[+]** button.

Click the little green [+] to begin adding your own relationship type.

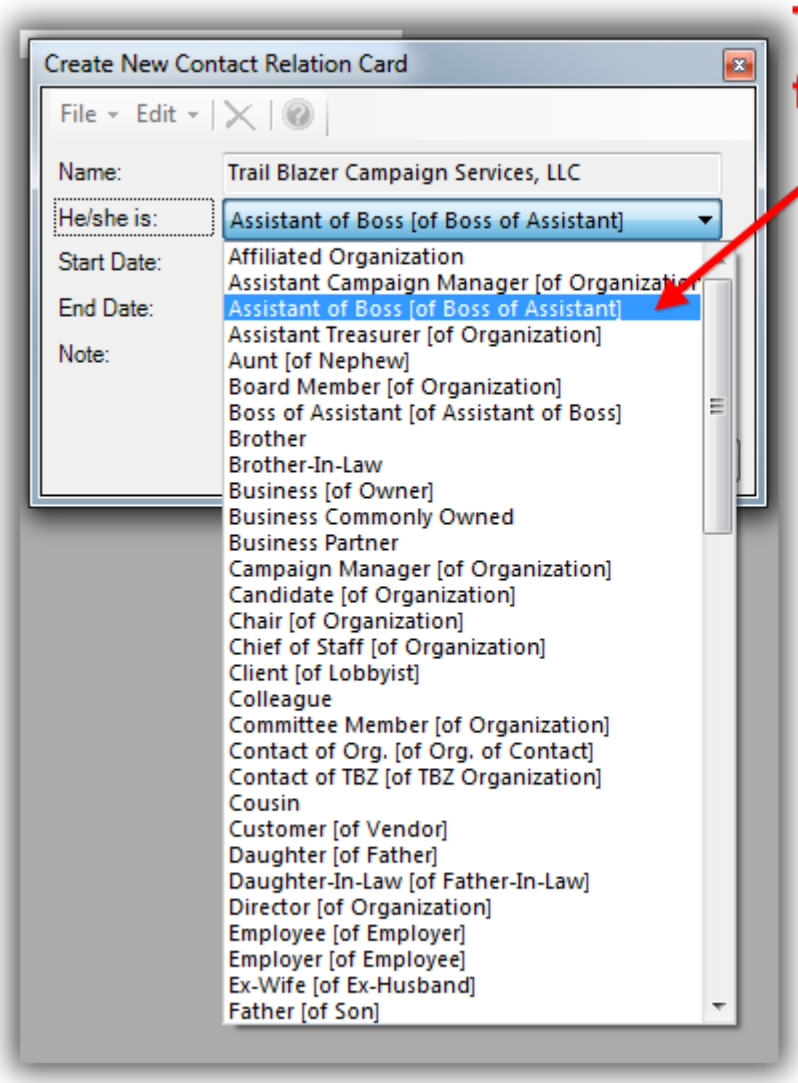


5) Select the **Gender** from both Contact 1 and Contact 2 (*it can be either if you want*). Create a description for the relationship and click **[Save]**. *My example is below where I created a relationship for **assistant** and **boss**.*

Create your new relationship type and click [Save].



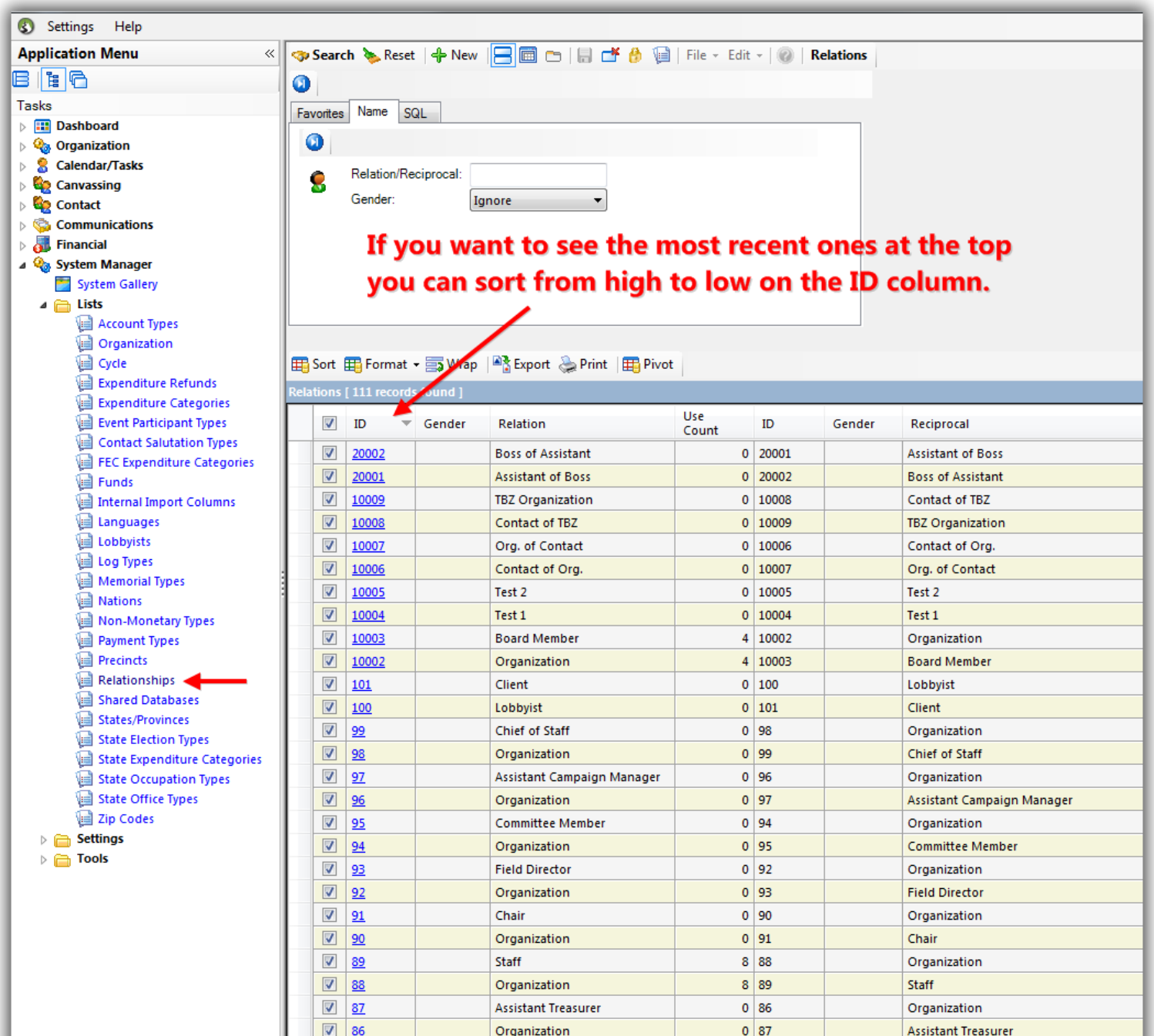
6) The new option will now display in the drop-down for all database users.



The new option will now be available for all database users.

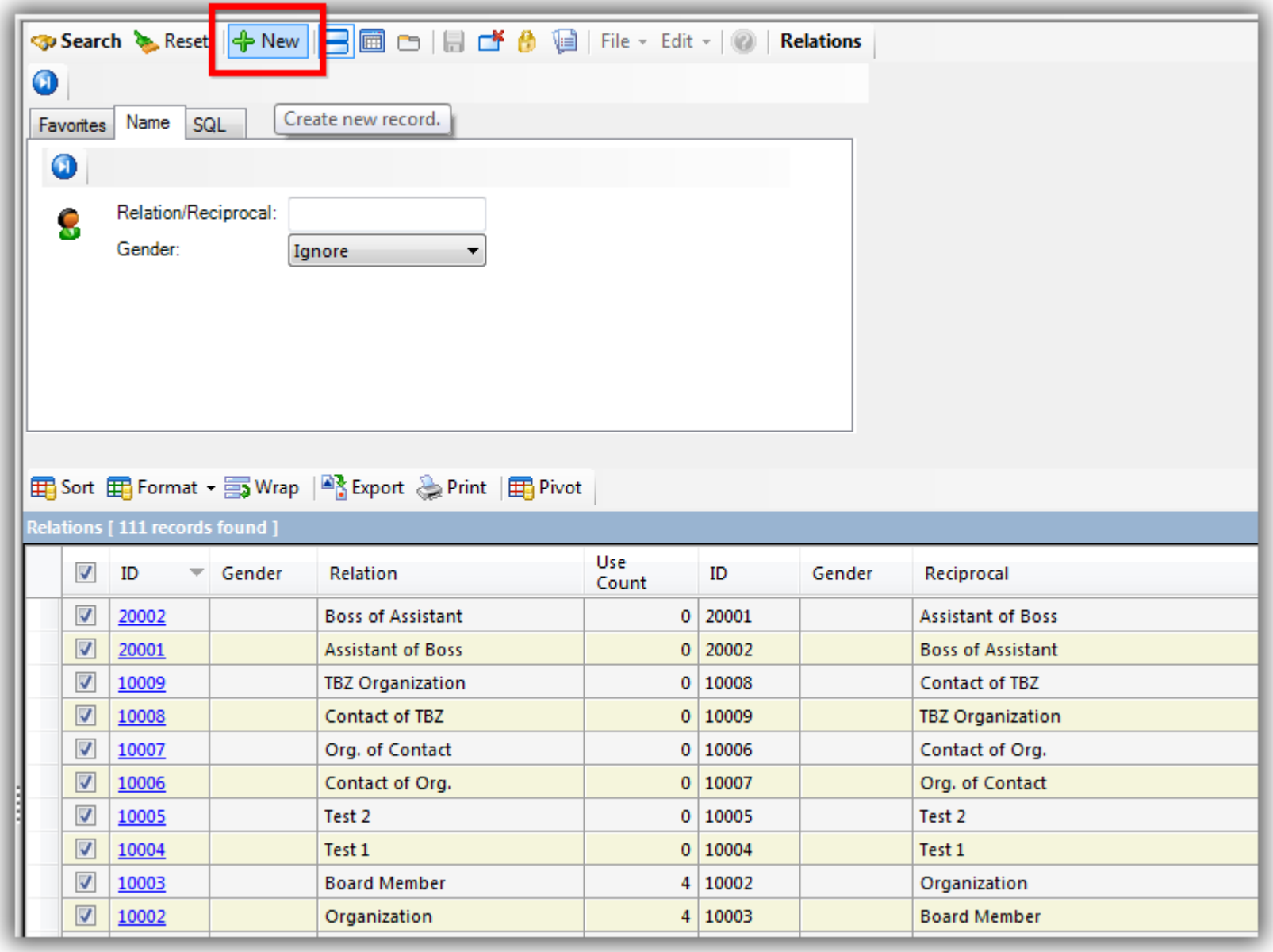
Steps – From The Relationships List

1) Navigate to the **Relationships** list under the **Application Menu**. *In my example I also sorted from high to low on the **ID** column to see the most recent ones at the top.*



ID	Gender	Relation	Use Count	ID	Gender	Reciprocal
20002		Boss of Assistant	0	20001		Assistant of Boss
20001		Assistant of Boss	0	20002		Boss of Assistant
10009		TBZ Organization	0	10008		Contact of TBZ
10008		Contact of TBZ	0	10009		TBZ Organization
10007		Org. of Contact	0	10006		Contact of Org.
10006		Contact of Org.	0	10007		Org. of Contact
10005		Test 2	0	10005		Test 2
10004		Test 1	0	10004		Test 1
10003		Board Member	4	10002		Organization
10002		Organization	4	10003		Board Member
101		Client	0	100		Lobbyist
100		Lobbyist	0	101		Client
99		Chief of Staff	0	98		Organization
98		Organization	0	99		Chief of Staff
97		Assistant Campaign Manager	0	96		Organization
96		Organization	0	97		Assistant Campaign Manager
95		Committee Member	0	94		Organization
94		Organization	0	95		Committee Member
93		Field Director	0	92		Organization
92		Organization	0	93		Field Director
91		Chair	0	90		Organization
90		Organization	0	91		Chair
89		Staff	8	88		Organization
88		Organization	8	89		Staff
87		Assistant Treasurer	0	86		Organization
86		Organization	0	87		Assistant Treasurer

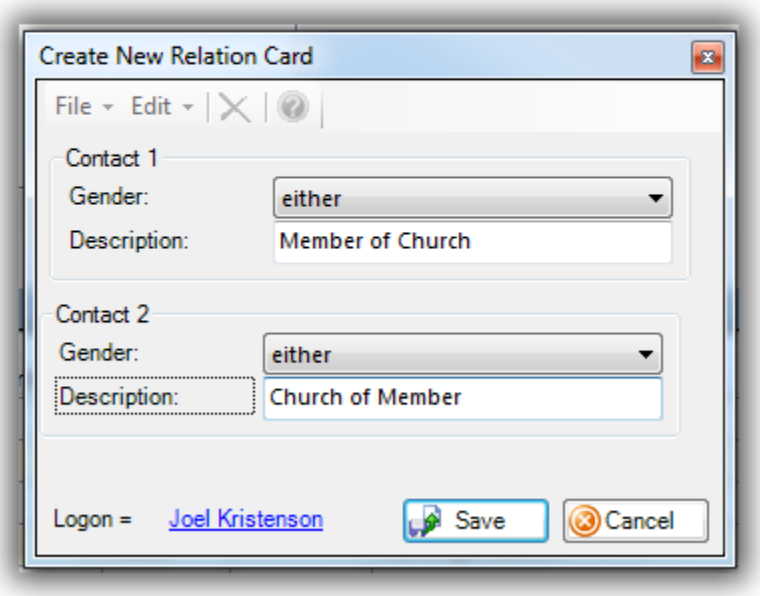
2) Click the **[+ New]** button on the **Search** tool strip.



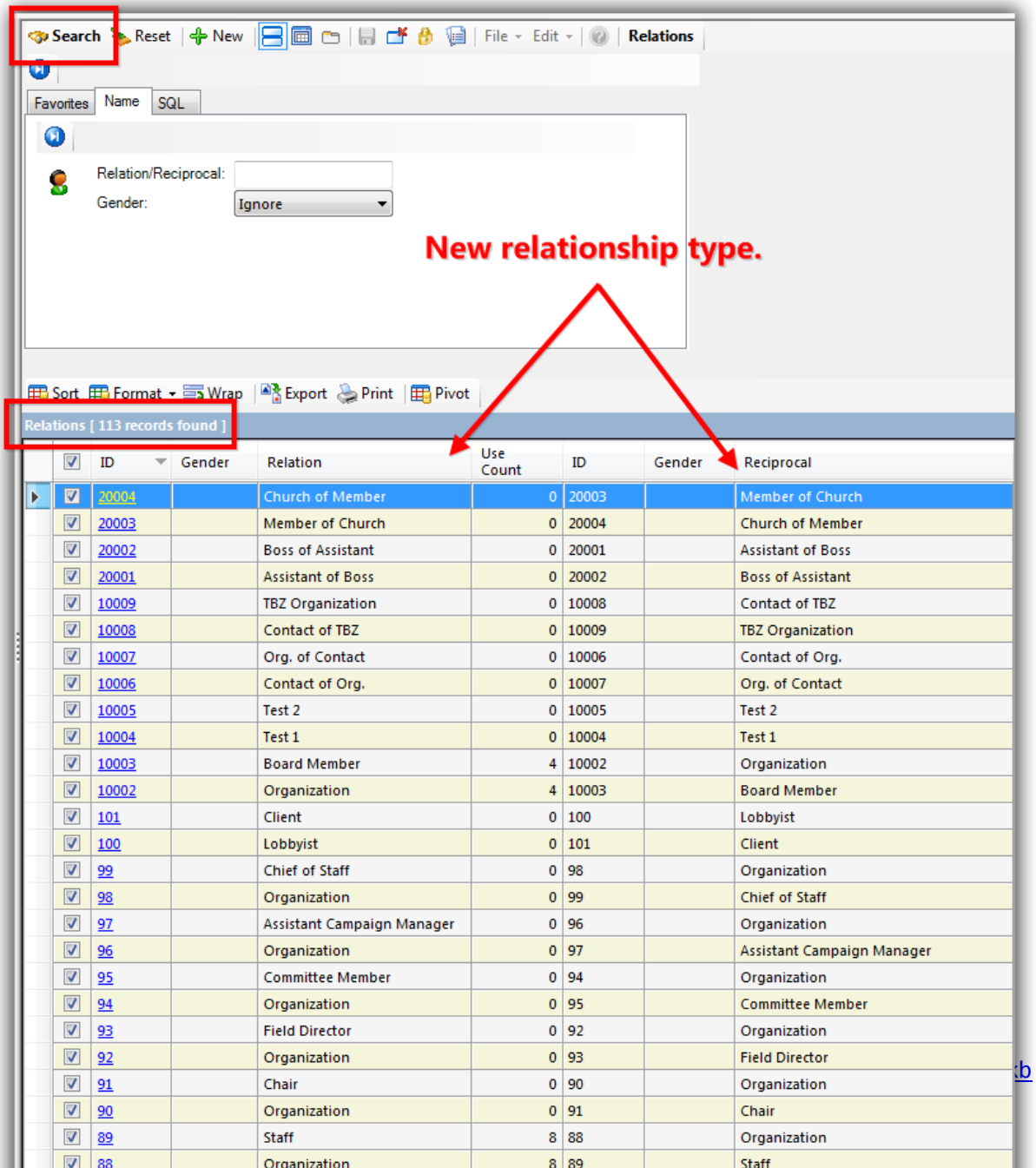
ID	Gender	Relation	Use Count	ID	Gender	Reciprocal
20002		Boss of Assistant	0	20001		Assistant of Boss
20001		Assistant of Boss	0	20002		Boss of Assistant
10009		TBZ Organization	0	10008		Contact of TBZ
10008		Contact of TBZ	0	10009		TBZ Organization
10007		Org. of Contact	0	10006		Contact of Org.
10006		Contact of Org.	0	10007		Org. of Contact
10005		Test 2	0	10005		Test 2
10004		Test 1	0	10004		Test 1
10003		Board Member	4	10002		Organization
10002		Organization	4	10003		Board Member

3) Create the new relationship type and click **[Save]**. *My example is below.*

Create the new relationship type (gender/description) and click [Save].



4) Click **[Search]** to refresh the data in the grid. *In my example I now have 113 relationship types.*



ID	Gender	Relation	Use Count	ID	Gender	Reciprocal
20004		Church of Member	0	20003		Member of Church
20003		Member of Church	0	20004		Church of Member
20002		Boss of Assistant	0	20001		Assistant of Boss
20001		Assistant of Boss	0	20002		Boss of Assistant
10009		TBZ Organization	0	10008		Contact of TBZ
10008		Contact of TBZ	0	10009		TBZ Organization
10007		Org. of Contact	0	10006		Contact of Org.
10006		Contact of Org.	0	10007		Org. of Contact
10005		Test 2	0	10005		Test 2
10004		Test 1	0	10004		Test 1
10003		Board Member	4	10002		Organization
10002		Organization	4	10003		Board Member
101		Client	0	100		Lobbyist
100		Lobbyist	0	101		Client
99		Chief of Staff	0	98		Organization
98		Organization	0	99		Chief of Staff
97		Assistant Campaign Manager	0	96		Organization
96		Organization	0	97		Assistant Campaign Manager
95		Committee Member	0	94		Organization
94		Organization	0	95		Committee Member
93		Field Director	0	92		Organization
92		Organization	0	93		Field Director
91		Chair	0	90		Organization
90		Organization	0	91		Chair
89		Staff	8	88		Organization
88		Organization	8	89		Staff

The **related resources** below link to a variety of similar articles and videos regarding relationship and household management.

Related Resources

Article: Linking Records through Relationships, Querying with Relationships, and How to Delete a Relationship
Article: Delete a Relationship between Contact Records
Article: Splitting 'Couples' into Separate Records En Masse using the Built-In Utility
Article: How to Split Contact Record into a Duplicate Contact Record for Householding a Couple
Article: Managing Households – Creating, Deleting and Re-Creating
Article: Household Export
Video: Households – Delete and Recreate
Video: Households – Drag n Drop
Video: Households – Combine More Than 5 Members

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