


Author: Kristenson, Joel
Last Updated: 2016-10-17

Overview

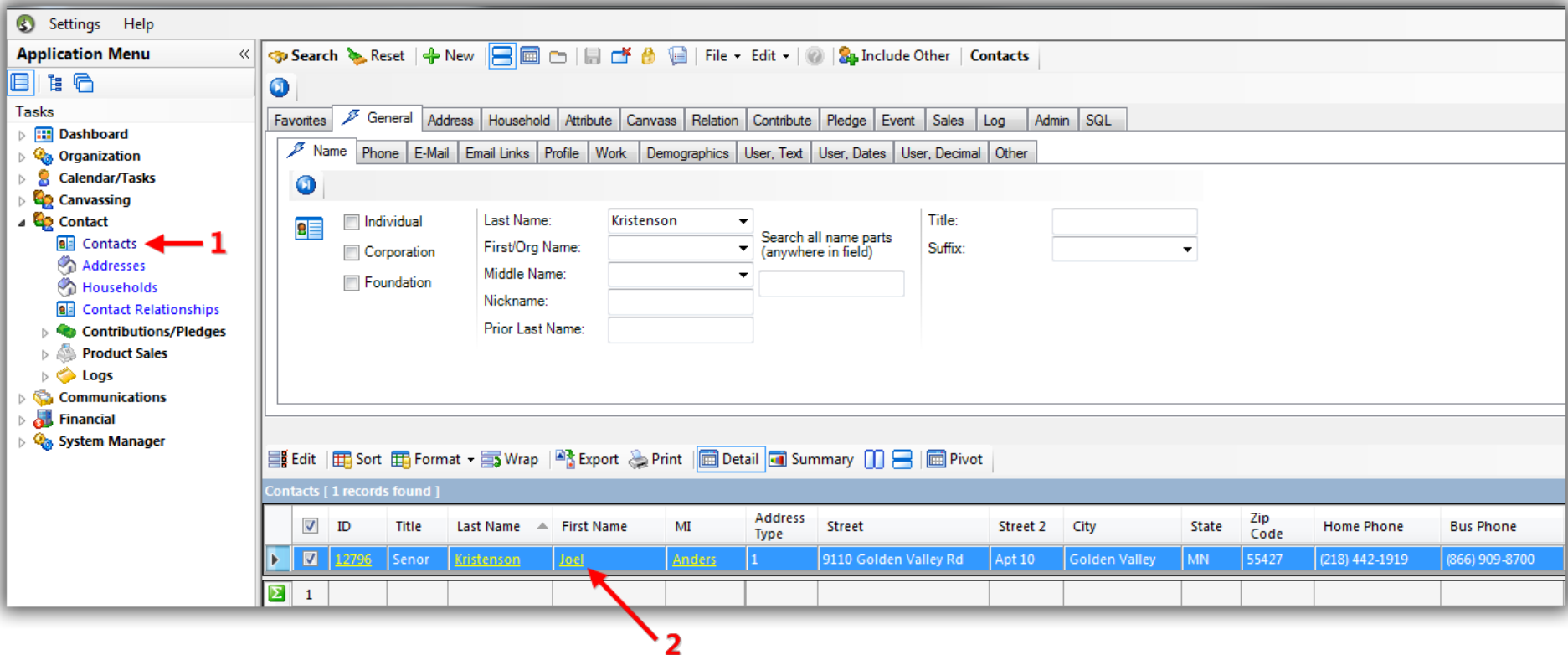
There are **two** ways you can **create your own relationship types**; either from within a contact's record card, or from the **Relationships** list. This article walks through both.

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

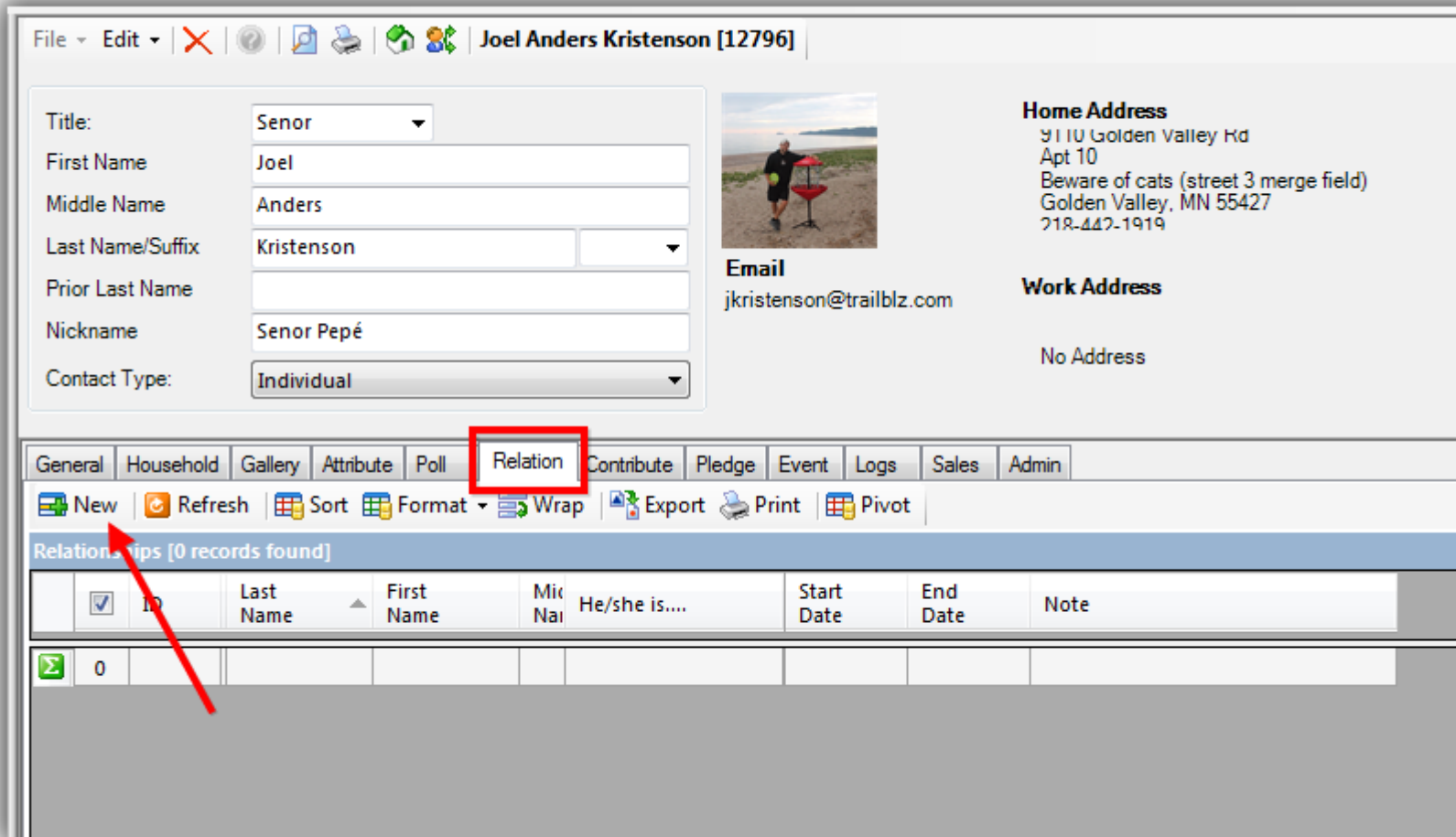
1) Search for any contact in your database and open their record.



The screenshot shows the TrailBlazer software interface. On the left is an 'Application Menu' with a 'Tasks' section containing 'Contacts' (highlighted with a red arrow and the number 1). The main area displays a contact record card for 'Joel Kristenson'. The card includes fields for 'Last Name', 'First/Org Name', 'Middle Name', 'Nickname', and 'Prior Last Name'. Below the card is a table of contacts with one record found. A red arrow labeled '2' points to the 'Relation' tab in the top navigation bar.

ID	Title	Last Name	First Name	MI	Address Type	Street	Street 2	City	State	Zip Code	Home Phone	Bus Phone
12796	Senor	Kristenson	Joel	Anders	1	9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427	(218) 442-1919	(866) 909-3700

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



The screenshot shows the TrailBlazer interface for a contact named Joel Anders Kristenson [12796]. The contact details include:

- Title:** Senior
- First Name:** Joel
- Middle Name:** Anders
- Last Name/Suffix:** Kristenson
- Prior Last Name:**
- Nickname:** Senior Pepé
- Contact Type:** Individual

Additional information includes a profile picture, an email address (jkristenson@trailblz.com), and home and work addresses. The home address is 9110 Golden Valley Rd, Apt 10, Golden Valley, MN 55427, with phone number 718-442-1919. The work address is listed as "No Address".

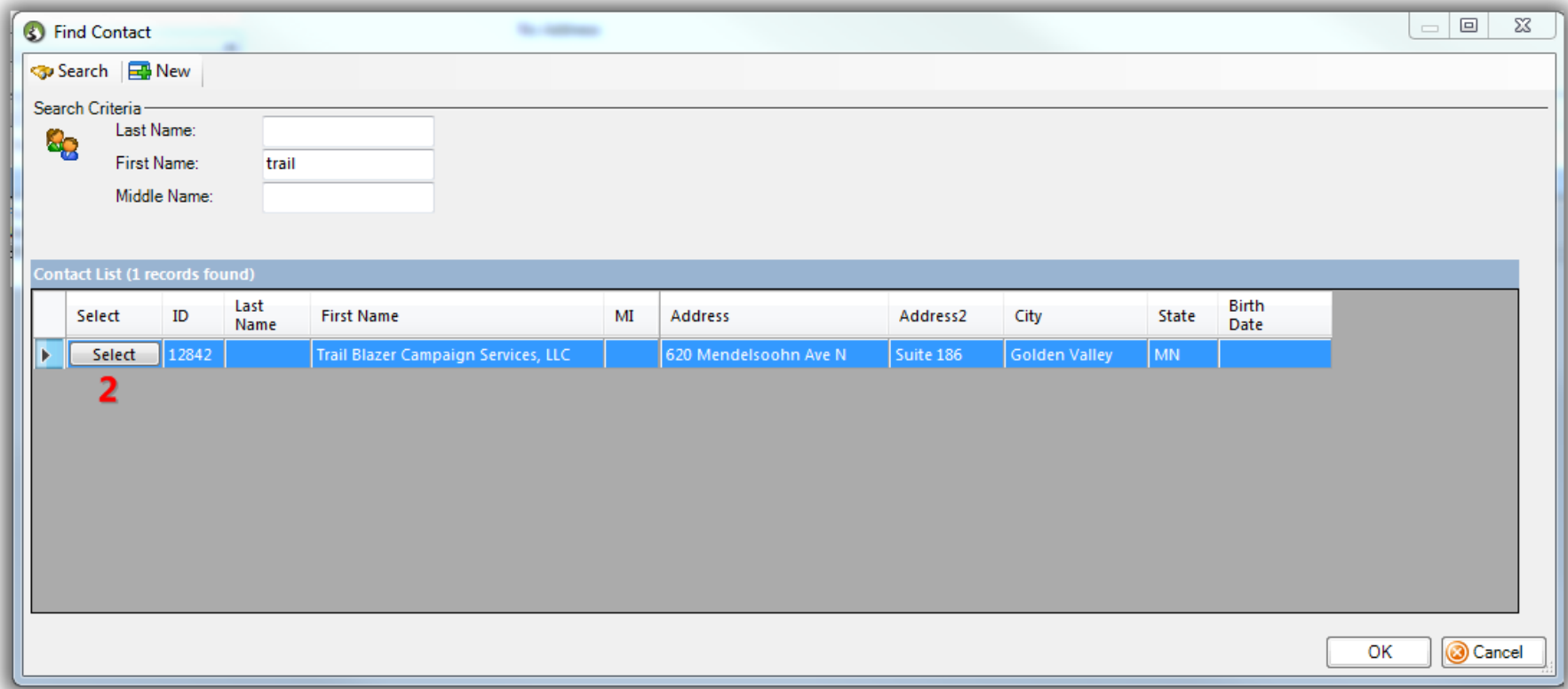
Below the contact details is a navigation bar with tabs: General, Household, Gallery, Attribute, Poll, **Relation** (highlighted with a red box), Contribute, Pledge, Event, Logs, Sales, Admin. Below the navigation bar is a toolbar with icons for New, Refresh, Sort, Format, Wrap, Export, Print, and Pivot. A red arrow points to the "New" icon.

The "Relationships" table shows 0 records found. The table has the following columns:

ID	Last Name	First Name	Middle Name	He/she is....	Start Date	End Date	Note
0							

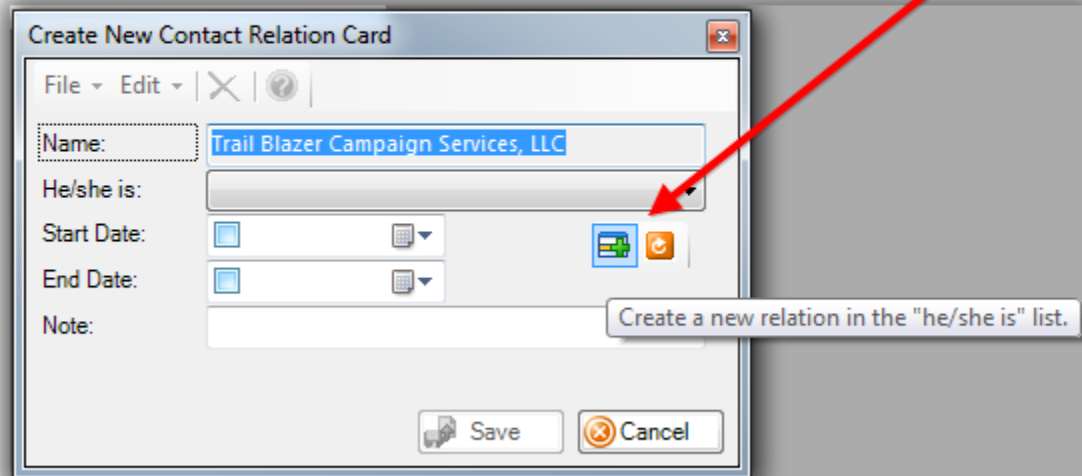
3) Search for and select the contact you want to add a relationship for or click **[+ New]** if they aren't in your database yet.

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



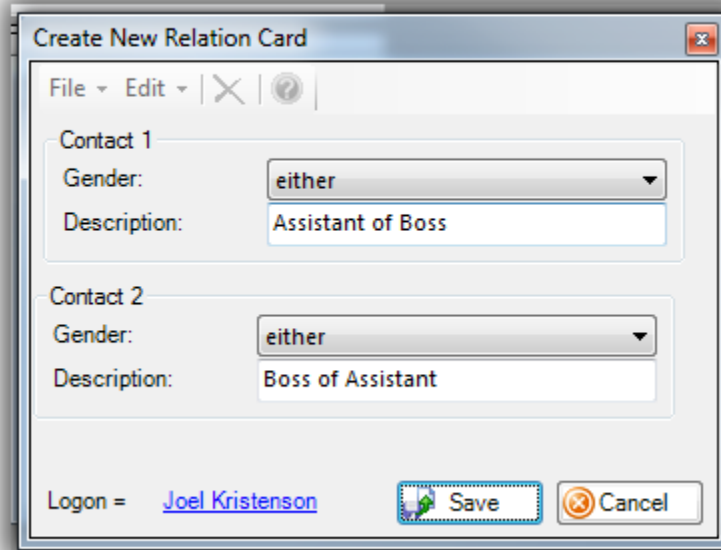
4) To add your own relationship type click the little green [+] button.

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

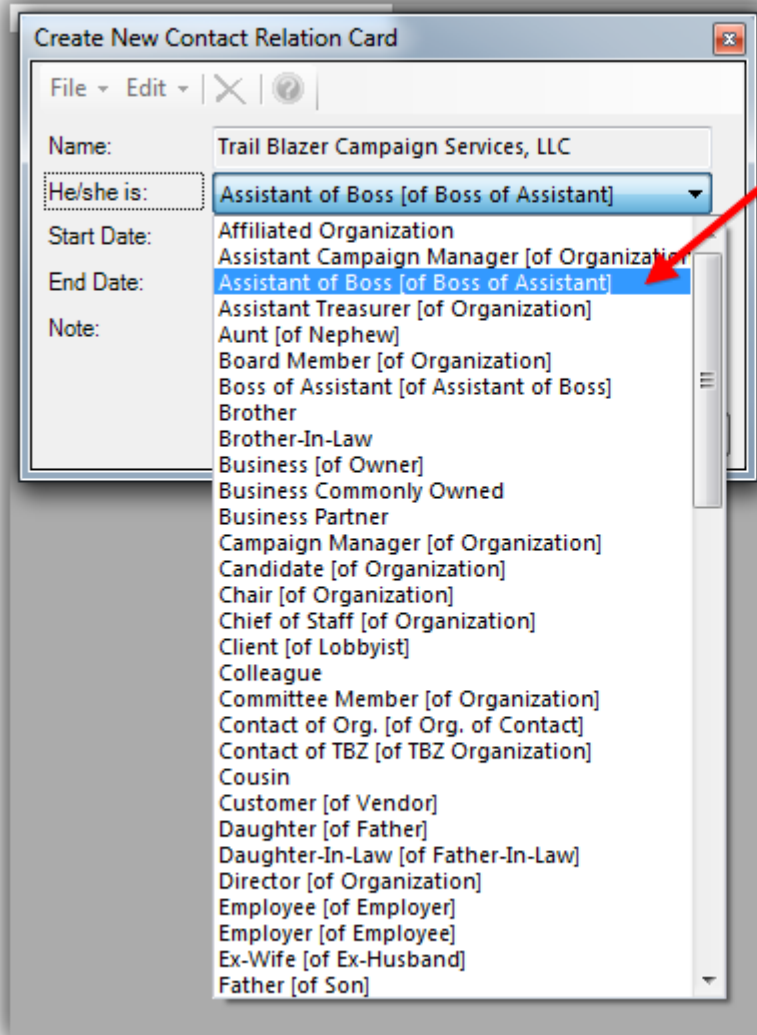


5) Select the **Gender** from both Contact 1 and Contact 2 (*it can be either if you want*). Create a description for the relationship and click **[Save]**. My example is below where I created a relationship for **assistant** and **boss**.

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.

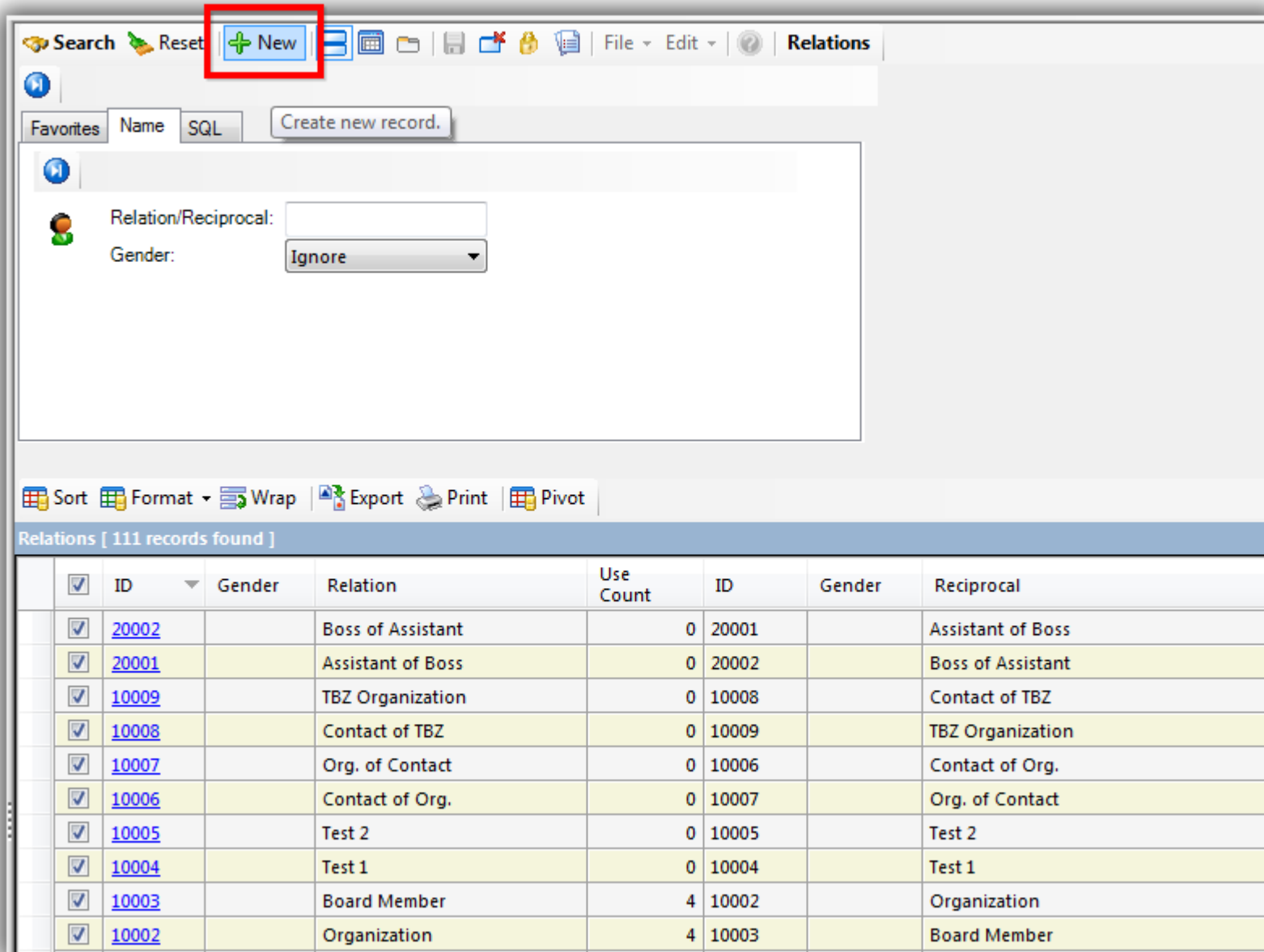
Steps – From The Relationships List

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.*

If you want to see the most recent ones at the top you can sort from high to low on the ID column.

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.

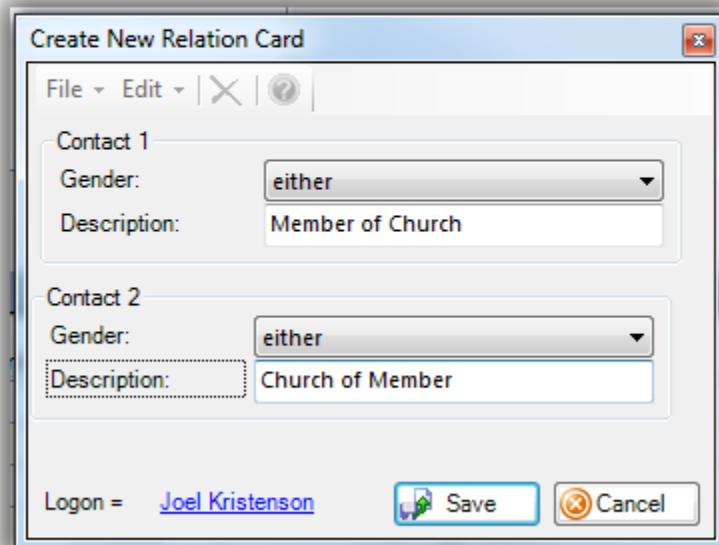


The screenshot shows the TrailBlazer software interface. At the top, there is a toolbar with buttons for Search, Reset, and a highlighted **New** button (circled in red). Below the toolbar are tabs for Favorites, Name, and SQL, along with a 'Create new record.' button. The main area contains a form with two fields: 'Relation/Reciprocal:' (an empty text box) and 'Gender:' (a dropdown menu currently set to 'Ignore'). Below the form is another toolbar with buttons for Sort, Format, Wrap, Export, Print, and Pivot. At the bottom, a status bar indicates 'Relations [111 records found]' above a data table.

<input checked="" type="checkbox"/>	ID	Gender	Relation	Use Count	ID	Gender	Reciprocal
<input checked="" type="checkbox"/>	20002		Boss of Assistant	0	20001		Assistant of Boss
<input checked="" type="checkbox"/>	20001		Assistant of Boss	0	20002		Boss of Assistant
<input checked="" type="checkbox"/>	10009		TBZ Organization	0	10008		Contact of TBZ
<input checked="" type="checkbox"/>	10008		Contact of TBZ	0	10009		TBZ Organization
<input checked="" type="checkbox"/>	10007		Org. of Contact	0	10006		Contact of Org.
<input checked="" type="checkbox"/>	10006		Contact of Org.	0	10007		Org. of Contact
<input checked="" type="checkbox"/>	10005		Test 2	0	10005		Test 2
<input checked="" type="checkbox"/>	10004		Test 1	0	10004		Test 1
<input checked="" type="checkbox"/>	10003		Board Member	4	10002		Organization
<input checked="" type="checkbox"/>	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].



Logon = [Joel Kristenson](#)

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

Search Reset + New [Icons] File Edit Relations

Favorites Name SQL

Relation/Reciprocal: [Dropdown]
Gender: Ignore [Dropdown]

New relationship type.

Sort Format Wrap Export Print Pivot

Relations [113 records found]

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.



Trail Blazer™

- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources

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](#)

Trail Blazer Live Support

 **Phone:** 1-866-909-8700

 **Email:** support@trailblz.com

 **Facebook:** <https://www.facebook.com/pages/Trail-Blazer-Software/64872951180>

 **Twitter:** <https://twitter.com/trailblazersoft>

** As a policy we require that you have taken our intro training class before calling or emailing our live support team.*

[Click here](#) to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.

** After registering you'll receive a confirmation email with the instructions for how to log into the [GoToMeeting](#) session where we host our live interactive trainings.*

** This service is included in your contract.*