Associations

This navigation page displays other records in your database this record is associated with in some way.

Associations are commonly used to:

- Document Headquarter / Subsidiary Relationships
- Document Relatives
- Document Referrals

Please note this feature is informative only. You cannot search for associations or run reports based on them.

Adding Associations

1. Open any **Name, Company** or **Position Record**
2. Click **Associations** from the Navigation toolbar
3. Click **Add** from the action menu
4. Select the **Record Type** for the associated record
5. Enter a **Source Description** or select one from the pop out menu, this is the type of relationship between the records
6. Enter a **Target Description** if desired
7. Set a **Begin Date**, today's date will be used by default
8. Set an **End Date** if desired
9. Click the pop out menu for **Select Record** to search and select the desired record to be associated
10. Add any additional **Notes**
11. Click **Done** to save

The gear icon on the bottom left of the New Association window allows you to create custom descriptions that will appear in the pop out menu.