Allied Financial Software Knowledgebase

Act4Advisors Support - Relationship Feature in ACT! by Sage

Question:
I have a questions about the database functions perhaps you could help me with?

My question is about how to link contacts. I want to link associated names like

Children of the contact

Parents of the contact

Attorney of the contact

referrals from the contact

Who referred the contact to us

Is there a way to quicklly link all of these names?

Perhaps in a list of associated contacts that can be linked to their contact page?

I have seen this in other CRM programs.

I tried using the secondary contacts, but it doesnt link it to the contact page, and if you promote the secondary contact to it's own contact, it is no longer easily linked to the original contact.

Can you help with this?
Answer:

New versions of ACT! include a Relationships feature allow you to link one record to another and set the relationship, ie. Attorney>Client or Referrer>Referee or Parent>Child.

To do this, you will need ACT! 2009 v11.1 or greater. You can add the Relationship tab by editing the layout.

Tools > Design Layout> Contact.

Edit > Tabs.

Add Relate Contacts to Right side and move up to desired postion.

Save the layout and close the Editor.

A new tab called Relationships will be added and from there you can assign relationships.

http://kb.actforadvisors.com/questions.php?questionid=169