

## How to Associate Contact Records Together

Associating contact records enables users to create connections between people. For example, Participants could be associated together if they belong to the same family, or a Staff member could be associated with the Participants that they work with. To associate a Contact record:

- Hover over **Contacts** and select the relevant database, such as **Participants**



- Search for the record using the **Search** box



- Click on the **Eye** icon to the right of the record



- Select **Associations** from the sections on the left-hand side

- Click on the **Plus**  icon

- Select the **Type of Association**, such as **Participant**, and click **Add**

# Views

- Enter the name of the person that you wish to associate with this record and click **Search**
- Complete the form, selecting the relevant person in the **Associate With** field, and then click **Add**