healthwatch

Managing contacts using relationships

Using the Healthwatch CiviCRM

About this resource

The CRM allows you to represent connections between contacts by creating relationships.

For example:

- If a mother and son are both in your database, it can be useful to be able to look at either record and see that they are related to each other.
- If you have a key contact who works at your local council, it would be useful to know that the relationship between the individual and the organisation.

This resource explains how to create relationships on the CRM to help make the data on your CRM as useful as possible.

Creating relationships

There are a number of different relationships you can create on the CRM. This includes:

- Relationships between organisations
- Relationships between individuals and organisations
- Relationships between individuals.

For example, entering an organisation in the Current Employer field of an individual contact's record automatically creates an "Employee of" relationship from the individual to the organisation, and an "Employer of" relationship from the organisation to the individual.

When creating a contact, you can enter in their current employer

Here, it can be seen that the contact has an employer, and that there is also a relationship on file under the contact's 'Relationships' tab.

It is possible to go to the organisation that the contact is an employee of by clicking onto the name of it. On that contact record, we can then look at what other relationships it has:

Here, we can see that there is another employee linked to the organisation, and the current CEO. These are at the top under Current Relationships. There is also an Inactive Relationships section, where inactive relationships are kept – these are relationships that are disabled or have a past end date, in this case the former CEO. These inactive relationships are not counted in the number of relationships the contact has (that is displayed on the tab), only the current ones.

You have the ability to link different contacts with each other via relationships. Organisations and individuals have different relationships however: for example, an organisation cannot be an employee of an individual. When you try to add a new relationship to a contact, you will find a list appears for you to choose from – an organisation has a different list of possible relationships than an individual.

To add a new relationship, click on Add Relationship. This will then bring up a new screen:

Here, the relationship type Signposted to has been chosen: as you can see, only an organisation can be selected for this type of relationship. For other relationship types, such as spouse of, only individuals can be selected.

As can be seen, start dates and end dates can be entered for the relationship if required. When creating an active relationship, the Enabled box should be ticked or the relationship will immediately appear as disabled.

There are many different types of relationship pre-programmed into your CRM. If, however, you find that you need types that are not already there then you can ask your team's administrator to create you new relationship types. It is important that when doing so your administrator creates a new relationship type the type of contact used for both sides of the relationship is correct (i.e. all contacts, individuals or organisations).

Try it for yourself

- Look at a volunteer's record. Create the relationship 'Volunteer for', with a start date

- Go to the Relationships tab. Click through to the organisation the contact is volunteering for. Check that organisation's Relationships tab – has your contact appeared?

- What other relationships does this organisation have? Add a new one.