


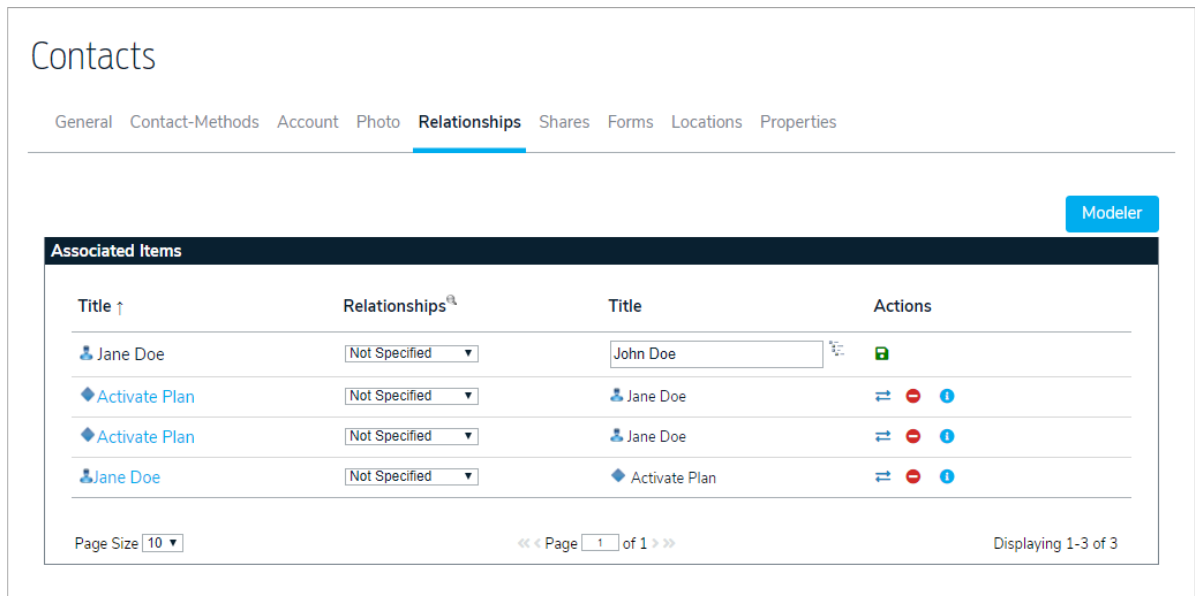
Relationships Tab

You can create relationships between items and any record type (except for [News & Updates](#)) through the **Relationships** tab of that record.











For more relationship features, see the [Relationship Mapping](#) tool in Administration, the [Relationship Editor](#) form type, or the [relationship builder](#) tool on custom forms.

To add a relationship from the Relationships tab of a record:

1. Navigate to the applicable organization and open the record.
2. Click the **Relationships** tab.
3. Select a relationship type from the dropdown menu in the **Relationships** column. Relationship types are configured in the [Referential Data](#) settings.
4. Click the textbox on the left of the top row and enter keywords to search for and select an object or click the  icon to the right of the text field to display the **Association Tree**, then select an object.



The screenshot shows the 'Contacts' record view with the 'Relationships' tab selected. The 'Associated Items' table is visible, showing a new relationship between 'Jane Doe' and 'John Doe'. The table has columns for 'Title', 'Relationships', 'Title', and 'Actions'. The first row shows a relationship between 'Jane Doe' and 'John Doe' with a 'Not Specified' relationship type and a save icon. The second and third rows show relationships between 'Activate Plan' and 'Jane Doe'. The fourth row shows a relationship between 'Jane Doe' and 'Activate Plan'. The 'Actions' column contains icons for swapping, deleting, and viewing more information.

Title ↑	Relationships ^ℹ	Title	Actions
Jane Doe	Not Specified	John Doe	
Activate Plan	Not Specified	Jane Doe	  
Activate Plan	Not Specified	Jane Doe	  
Jane Doe	Not Specified	Activate Plan	  

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A new relationship in the relationships tab of an object.

5. Click the  icon to save the relationship.

6. Click the  icons to swap the objects in the relationship, delete the relationship, or view more information.