

Plan Relationships

You can create relationships between items and any record type (except for News & Updates).

1. To add a relationship to a record, open the record.
2. Click the Relationships tab.
3. Locate the item you wish to associate with the record, then click to add it to the Associated Items section.

Contacts

General Contact-Methods Account Photo **Relationships** Shares Forms Locations Properties

Modeler

Select Items to Associate

- DD
- Enterprise Data
- Enterprise DR Exercise
- KW
- New Org
- Contacts
 - Jane Doe
 - John Doe
- NYDOH

Browse Filter - Results

Filter

Reset Advanced Filter

Associated Items

Title ↑	Relationships ↕	Title	Actions
John Doe	Not Specified	Jane Doe	⚙️ - ⓘ

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Relationship types are defined in the [Referential Data](#) settings.