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NPSP: Creating New Relationships

Add a new Relationship to create a Contact-to-Contact connection in your Salesforce.com instance. The reciprocal Relationship is automatically created for you.

Navigate to your Contact record

Relationships

Action	Relationship Number	Relationship Explanation	Status	Related Contact	Type
Edit	Del	R.00000003	Current	Mr. Tom Bar	Employee
Edit	Del	R.00000005	Current	Ms. Liz D'Onof	Friend
Edit	Del	R.00000006	Current	Ms. Stephanie Handman	Spouse

Navigate to the Contact you wish to create the Relationship for, and click 'New Relationship' on the Relationship related list.

Create your Relationship

Relationship Edit

Relationship Information

Contact:

Type:

Description:

Related Contact:

Status:

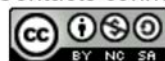
[Save](#) [Save & New](#) [Cancel](#)

Select the Type and Status of how the Contact is related to the 'Related Contact'. In the example above, Edna Frank would be John Bond's Aunt. Click 'Save' when complete.

Reciprocal Relationship is automatically created

The image shows two side-by-side screenshots of the Salesforce NPSP interface. The left screenshot displays the 'Contact Detail' for John Bond, with fields for Name, Account Name, Title, Department, Location, Reports To, Lead Source, Gender, Mailing Address, Language, Created By, and Description. Below this is a 'Relationships' table with columns for Action, Relationship Number, Relationship Explanation, Status, Related Contact, and Type. The right screenshot displays the 'Contact Detail' for Edna Frank, with similar fields. A red arrow points from the 'Relationships' section of John Bond's record to the 'Relationships' section of Edna Frank's record, indicating a reciprocal relationship.

The reciprocal Relationship is automatically created for the two Contacts connected.



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