Linking Contact Records Together

WorkCenter has a feature incorporated to allow the users to link or tie contact records together. As we have explained in past videos, the more information you can gather on individual clients, the more opportunities you have to capitalize on that data.

The linking process will allow you to open a contact record and show how that contact is associated with another contact. To link contacts, follow these instructions:

Step #1: Open your contact record that you wish to have linked to another contact record. You can do that by double clicking on the contact record.

Step #2: When the contact record is opened on your computer screen, click on the "Links" tab located at the bottom of the screen view when you are viewing the "Contact Tab view"

Step #3: Left click and hold down your mouse on the contact record in the listing at the left that you wish to tie to this contact record. Drag the contact into the "Links" screen and you will notice a line appear and a default heading will show "Referred by". If you wish to change the linking name, left click on the name and select from the drop down list.

Step #4: If you wish to add additional headings to your drop down list, click on TOOLS, SETUP OPTIONS and select the OPTIONS/LISTS button located at the left side of the screen.

Click the drop down arrow under the Option Lists and select "Contact Ref Types". You will notice we have 8 default headings. To add a new heading, click into the screen and type the desired heading. Once you have completed the process, click on the "OK" button to save your changes.

The next time you use the linking process, you will notice your new option list item or items will now be available.