Accessing Related Information

This guide will cover:

- The process of creating an access point to relevant data that is connected back to a specific contact record.

Step One

To access related information for a contact, you will first need to load a record. Search for the contact record you are looking for.

Step Two

Once you locate the contact, click on the drop-down (on the same line as the contact) and select View. This will load that contact record.

Step Three

Click .

Step Four

After selecting your choice(s) from the Related Information list, tabs will be added to the contact record. The system will default this display after saving. (This will show for any contact records that are opened.)