

How to link a contact to an organization

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Linking contacts to organizations creates clear relationships and improves reporting.

Steps

1. Open the contact record.
2. Locate the **Organization, Company**, or similar field.
3. Begin typing the organization name and select it from the list (or create a new organization if it does not yet exist).
4. Save the contact.

Once linked:

- You can see the organization from the contact record.
- You can see all related contacts from the organization record.
- Reports and filters that use organization become more accurate.

This is especially valuable for corporate giving, foundation relationships, and partner organizations.
