Splitting Couples into Separate Contact Records En Masse using the Built-In Utility

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Overview

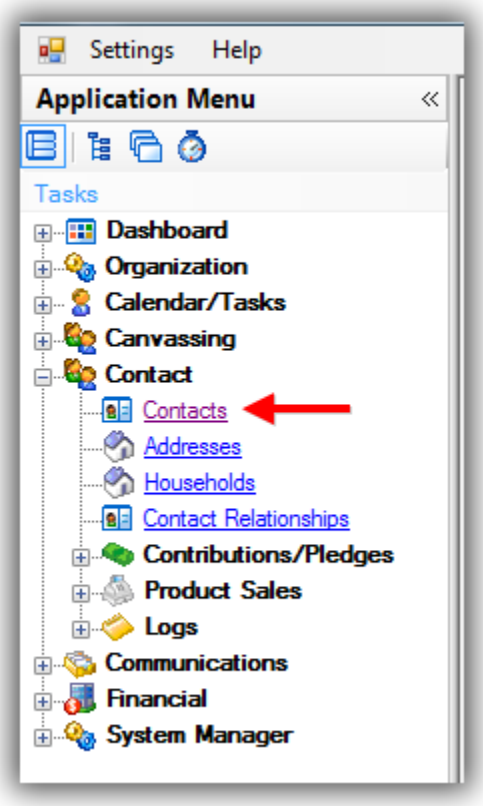
This article walks through the steps to **split** 'individual' records in your database that are currently being used to track a '**couple**' (ex: Bob and June Smith) into their own separate individual records.

The utility used in this *example* allows you to run this operation **en masse**, instead of performing it one-by-one. Once this operation is complete you can link the separate records together through a household relationship for the purpose of thank-you letters and other communications.

Tip: We *highly* suggest that you track each individual of a household as their own **separate records** in the database, and then link them through a household relationship. This can be effective for many reasons such as tracking if one member is the main donor, one or the other may have different attributes, and especially if one member has passed away and you want to hide them with a not attribute.

Steps

Navigate to the **Contacts** (*Voters/Donors*) list under the **Application Menu**.



Use an sql wildcard lookup to run a search for individual contacts that have either the word '**and**' in their First Name field, or the ampersand (**&**) symbol. You'll also need to add a '**/n**' in the Last Name field because it's ***required* that these individual records have a list name present** in order for this operation to work. *My example is below which produced **20** contacts that were tracking a 'couple' in an individual record card.*

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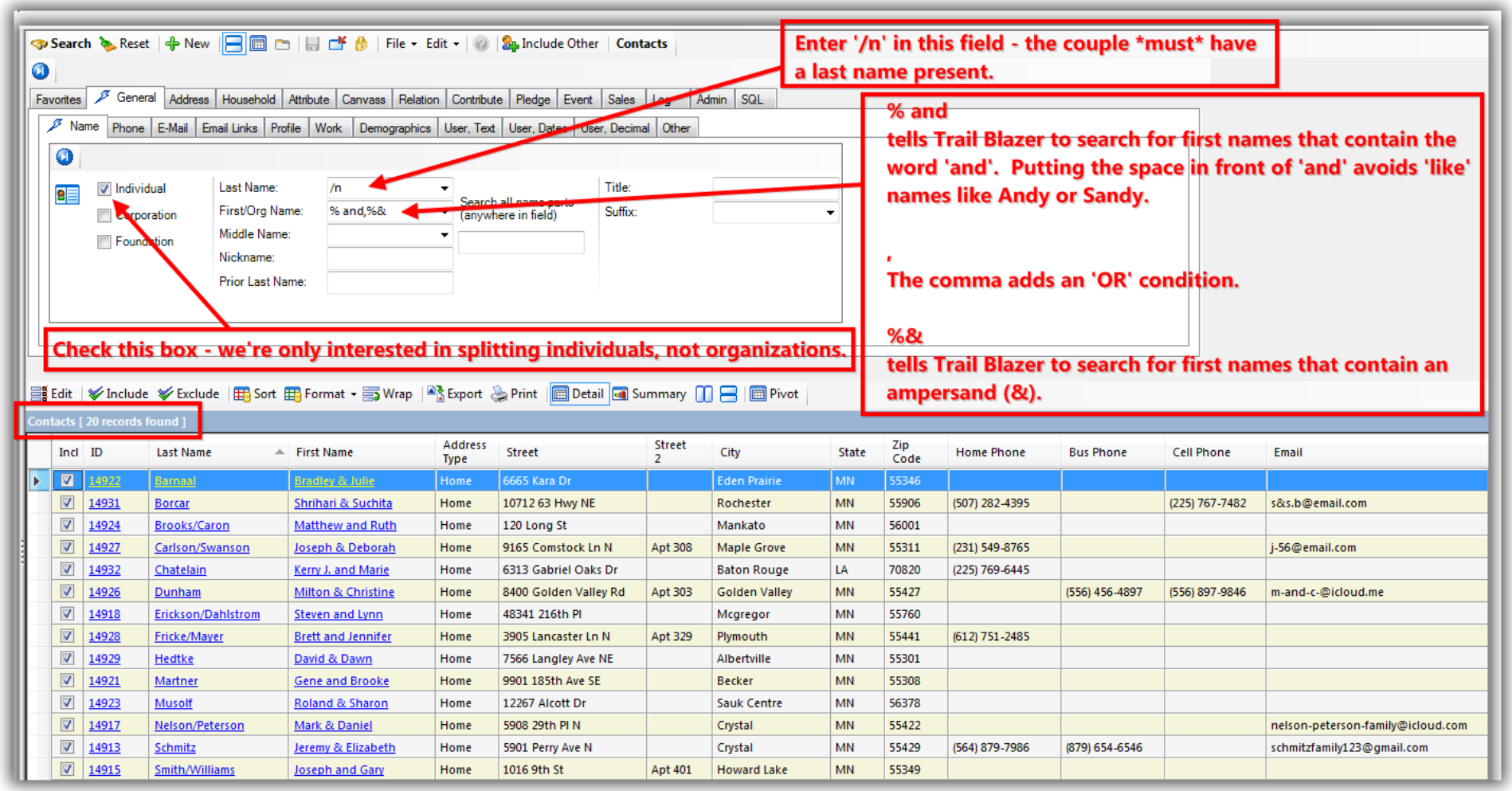

Incl	ID	Last Name	First Name	Address Type	Street	Street 2	City	State	Zip Code	Home Phone	Bus Phone	Cell Phone	Email
☑	14922	Barnaal	Bradley & Julie	Home	6665 Kara Dr		Eden Prairie	MN	55346				
☑	14931	Borcar	Shrihari & Suchita	Home	10712 63 Hwy NE		Rochester	MN	55906	(507) 282-4395		(225) 767-7482	s&s.b@email.com
☑	14924	Brooks/Caron	Matthew and Ruth	Home	120 Long St		Mankato	MN	56001				
☑	14927	Carlson/Swanson	Joseph & Deborah	Home	9165 Comstock Ln N	Apt 308	Maple Grove	MN	55311	(231) 549-8765			j-56@email.com
☑	14932	Chatelain	Kerry J. and Marie	Home	6313 Gabriel Oaks Dr		Baton Rouge	LA	70820	(225) 769-6445			
☑	14926	Dunham	Milton & Christine	Home	8400 Golden Valley Rd	Apt 303	Golden Valley	MN	55427		(556) 456-4897	(556) 897-9846	m-and-c-@icloud.me
☑	14918	Erickson/Dahlstrom	Steven and Lynn	Home	48341 216th Pl		Mcgregor	MN	55760				
☑	14928	Fricke/Mayer	Brett and Jennifer	Home	3905 Lancaster Ln N	Apt 329	Plymouth	MN	55441	(612) 751-2485			
☑	14929	Hedtke	David & Dawn	Home	7566 Langley Ave NE		Albertville	MN	55301				
☑	14921	Martner	Gene and Brooke	Home	9901 185th Ave SE		Becker	MN	55308				
☑	14923	Musolf	Roland & Sharon	Home	12267 Alcott Dr		Sauk Centre	MN	56378				
☑	14917	Nelson/Peterson	Mark & Daniel	Home	5908 29th Pl N		Crystal	MN	55422				nelson-peterson-family@icloud.com
☑	14913	Schmitz	Jeremy & Elizabeth	Home	5901 Perry Ave N		Crystal	MN	55429	(564) 879-7986	(879) 654-6546		schmitzfamily123@gmail.com
☑	14915	Smith/Williams	Joseph and Gary	Home	1016 9th St	Apt 401	Howard Lake	MN	55349				

Tip: If this is a task you think you'll need to come back to, or perform again the future, it's a good idea to save this query as one of your favorites for future use.

To bring up the 'splitting' utility follow **File** > **Utilities** > **Split Couples into Separate Contacts…**

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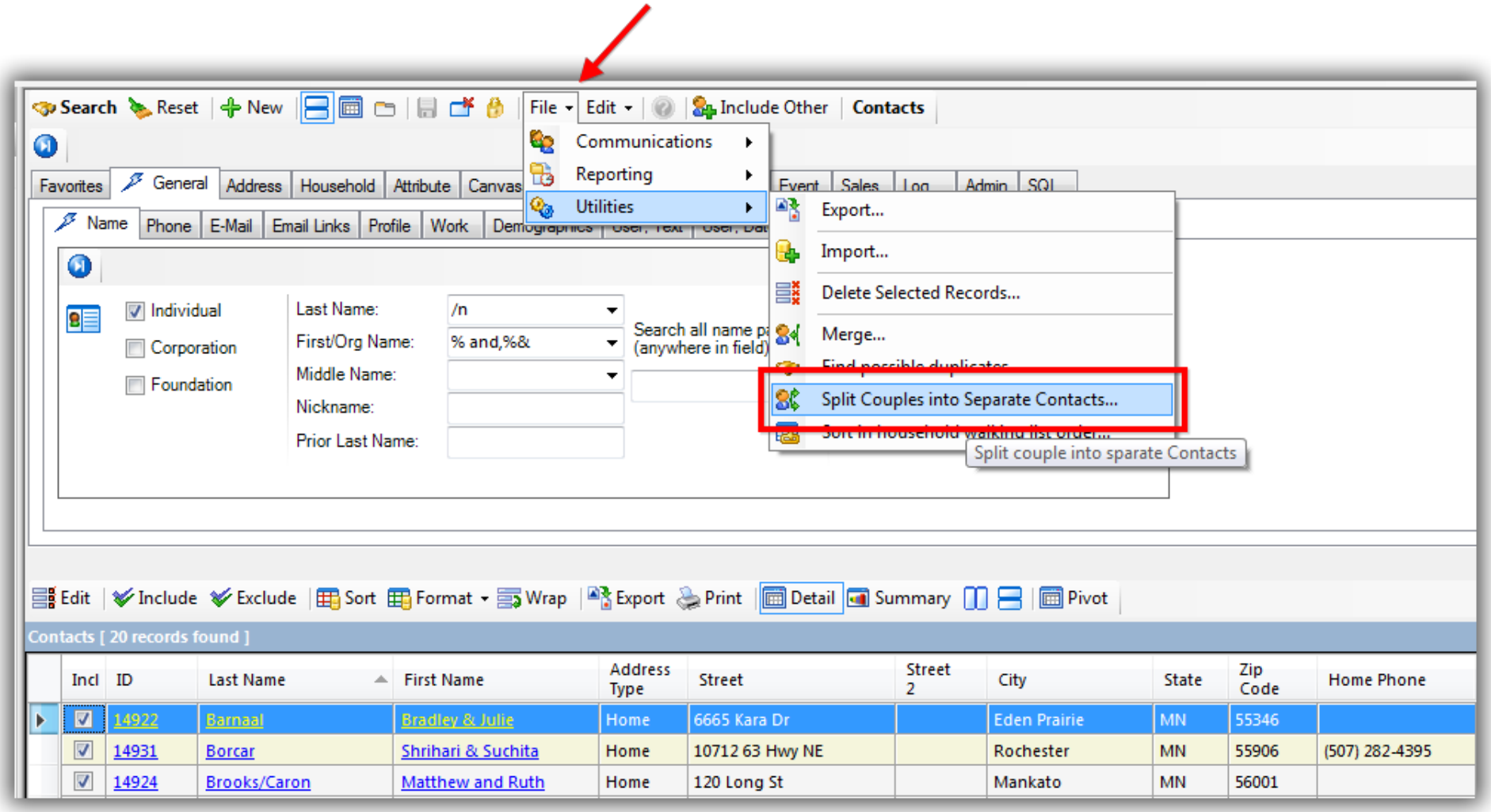
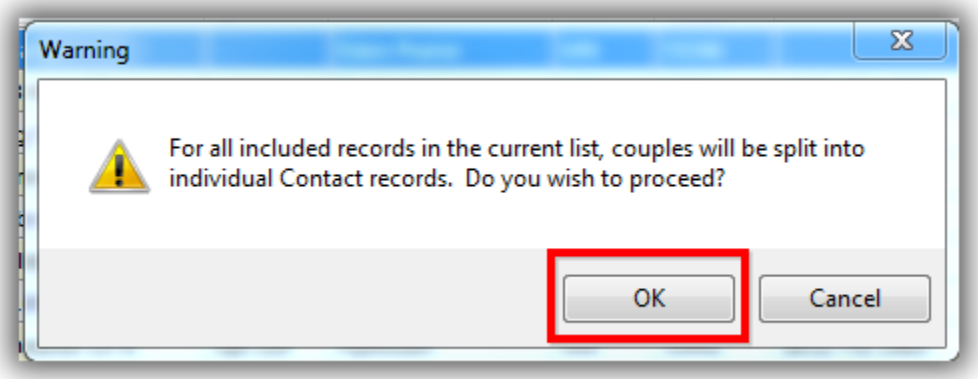
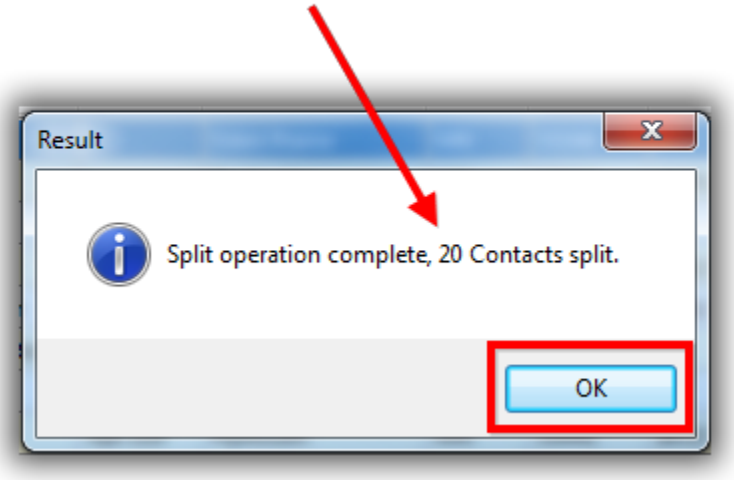


Click **[OK]** to proceed if you're 100% that you want to go forward with the splitting of couples in the list.

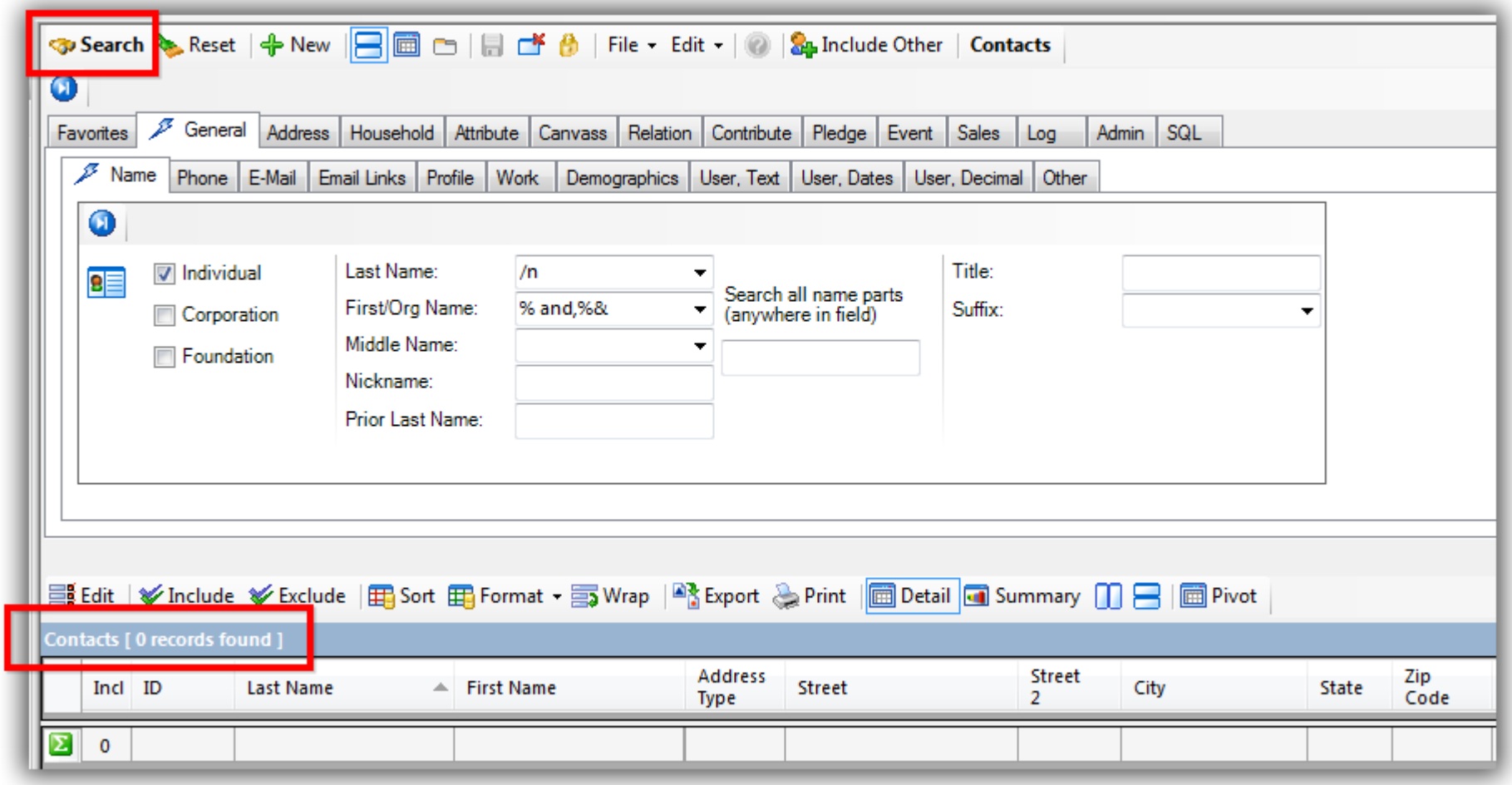


You'll get a popup message when the operation is complete, click **[OK]** to finish. *In my example all 20 couples were split into separate records.*

Results of the operation.



If you run the same search query as used in the first steps the count should now equal zero (if you ran the operation on the entire list), my *example* is shown below.



Take a look at the **related resources** below to learn about householding and other similar tools in Trail Blazer.

Trail Blazer
- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources

Related Resources

Article: Splitting Couples into Separate Records En Masse
Article: Managing Households – Creating, Deleting and Re-Creating
Article: Households – Creating, Deleting, Re-creating
Article: Household Automatic vs User Managed
Article: Household Record Count
Article: Household Records when Last Names are Different
Article: Household Export
Article: Find Possible Duplicates
Article: How to Find Duplicate Contact Records by Identical *Primary* Email Address, and Automatically Merge them Together
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Video: How to Manage Duplicates

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