Author: Joel Kristenson
Last Updated: 2015-10-13

Overview

This article will teach you how to see if your database has been householded, how to **automatically household** a database by certain preferences and how to **delete and recreate household** records. *Householding is a labor of love. The system does a lot of the heavy lifting by looking for contacts that live at the same home address, and creating the separate household record in your database, but it's up to you to keep them up-to-date by maintaining the correct* ***Salutation, and Envelope Names****.*

IMPORTANT: Prior to householding you'll want to make sure the address records for each member of a household are as consistent as possible. For example a street address could have a minor difference such as St. vs. Street. Click here to learn how to automatically conform addresses in your database.

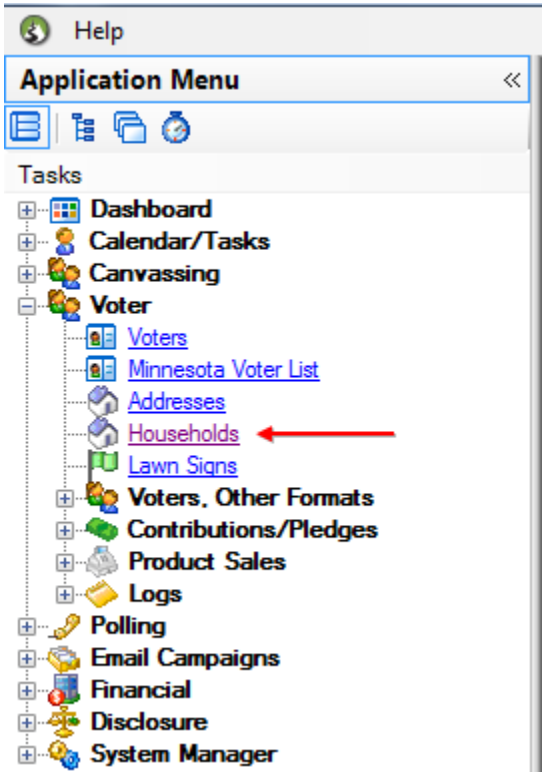
Outline

#1 Check if your Database has been Householded

#2 Automatically Household your Database
#3 Steps to Delete and Re-Create Household Records
#4 Related Resources

#1 Check if your Database has been Householded

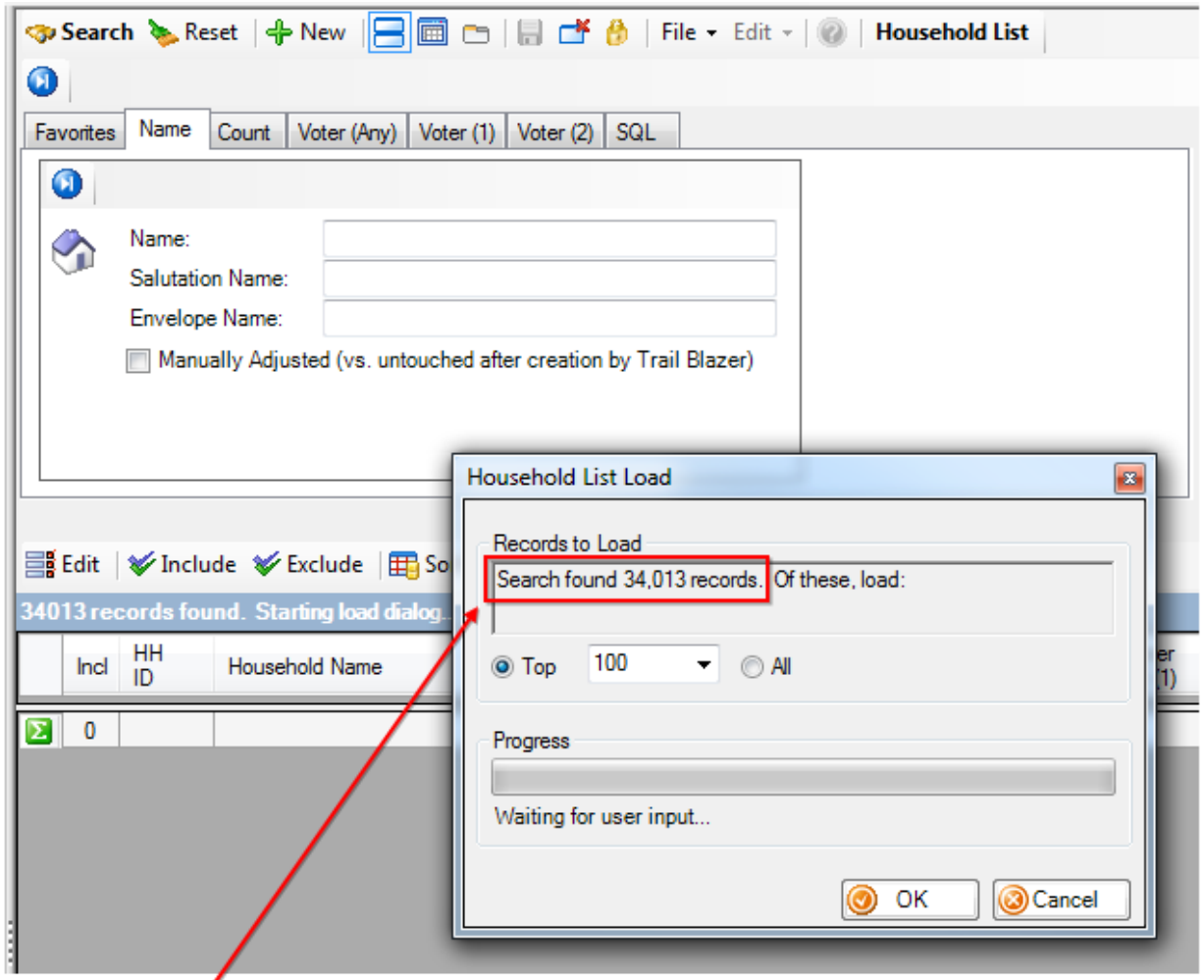
Under the **Application Menu** follow **Voter/Donor > Households**



Click **[Search]** from the **search** tool strip and if it returns zero records then your database has **not** been householded. If it returns a list of records it means your database has been householded at one point but there could be records that are not householded if they were added after the last householding process was run.

NOTE: Subsequent executions of the householding tool will **ONLY** household those records not previously household - in other words, new records added to your database since the last execution of the householding tool.

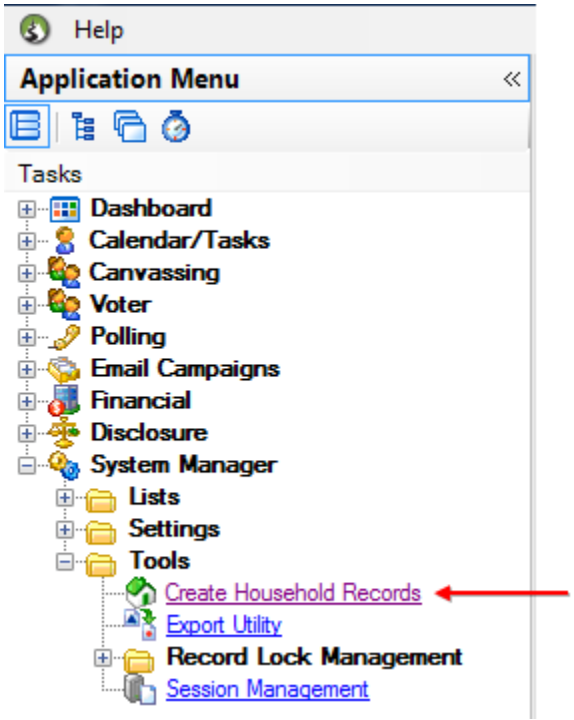
Households – Creating, Deleting and Re-creating



If your database has been householded you will be presented with a list of household records.

#2 Automatically Household your Database

Under the **Application Menu** follow **System Manager > Tools > Create Household Records** (*this assumes you have security access to this menu item – if not contact your DB administrator.*)

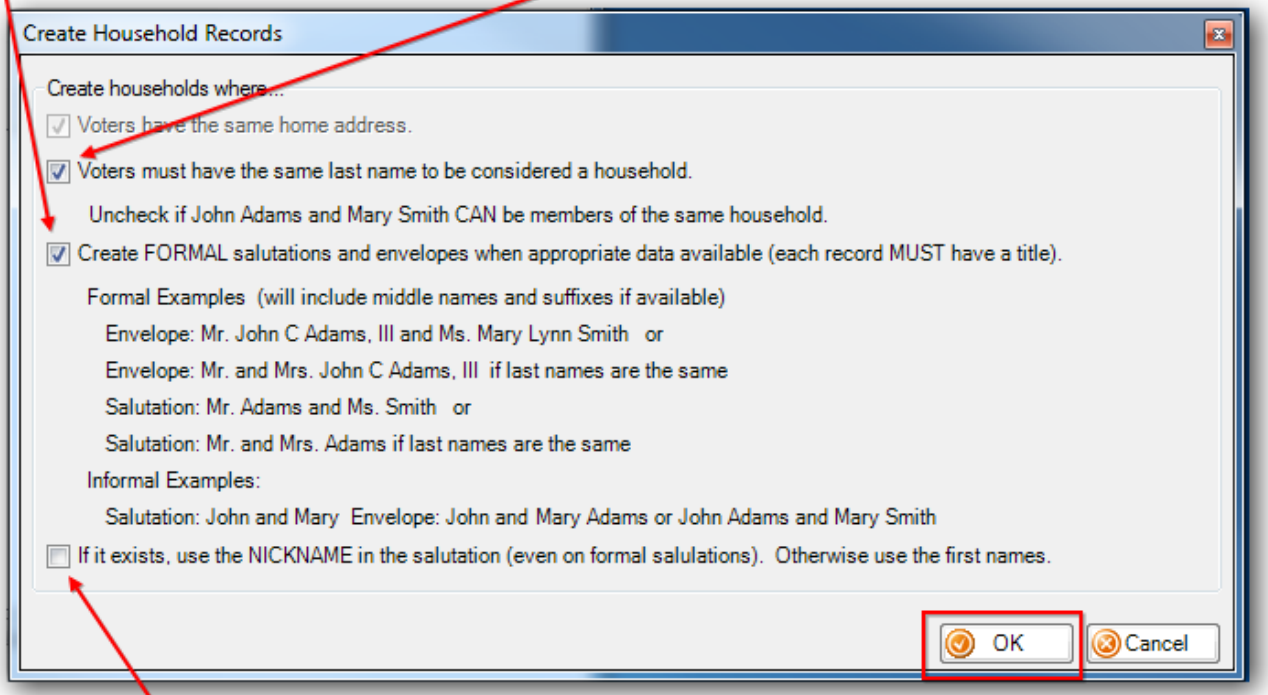


Select your **preferences** on how you want to **Household** the database within the **Create Household Record** window. Create households where… "**Voters have the same address**" is selected by **default** when householding.

*In this example I chose the options that "**Voters must have the same last name to be considered a household**" and "**Create FORMAL salutations and envelopes when appropriate data available (each record MUST have a title**") were selected.*

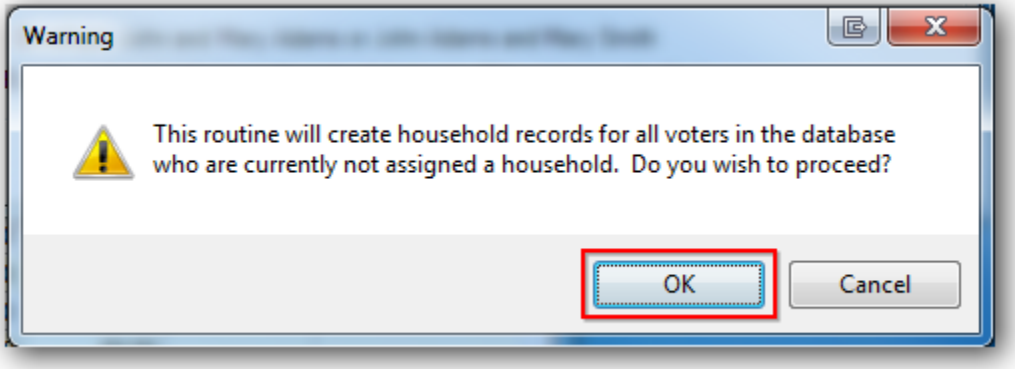
Tick this box if you want formal salutations created. (records must include a title)

Tick this box if you require the records to have the same last name to be householded.

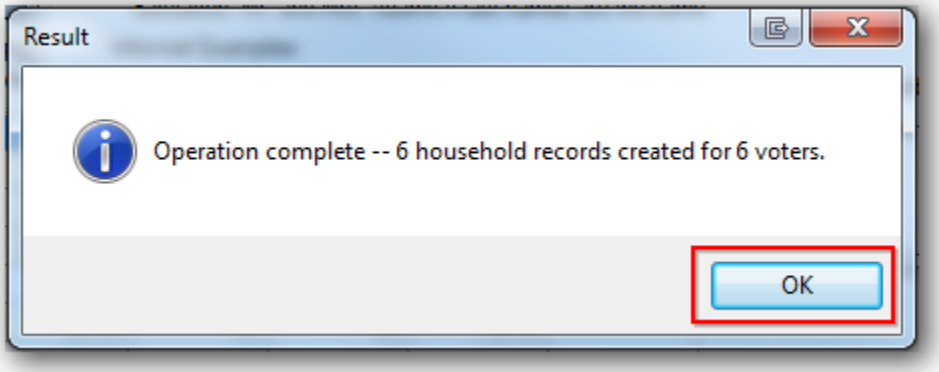


Tick this box if you want nicknames in the salutation (even on formal salutations). If nickname is not present it will use first name.

Click **[OK]** located in the bottom right of the **Create Household Record** window to begin the process. You will be prompted with a warning message, click **[OK]** if you want to proceed.



After running the process you will be presented with the results, click **[OK]** to finish.

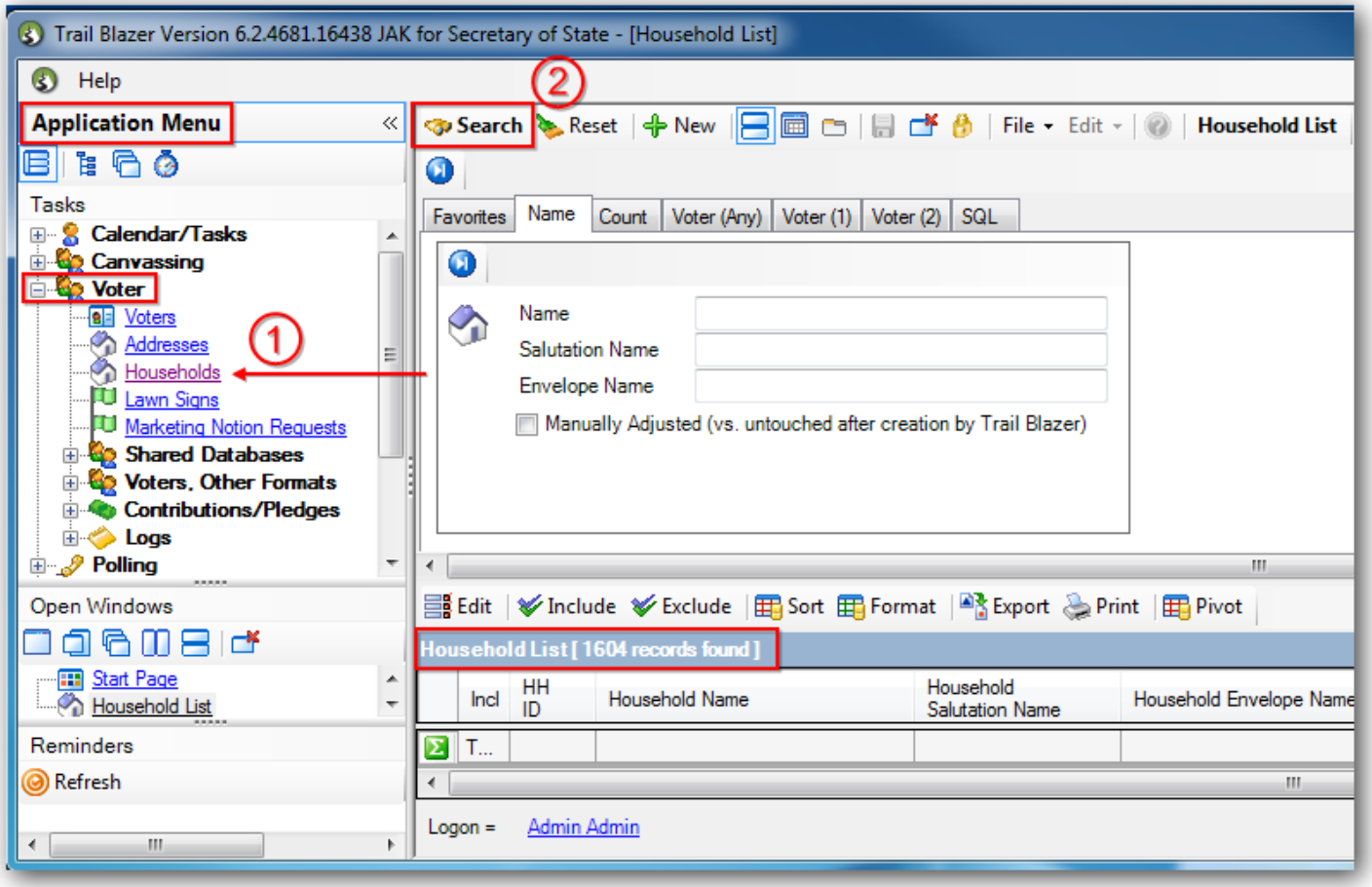


You're **finished** householding all records in your database that were not previously assigned to a **household**.

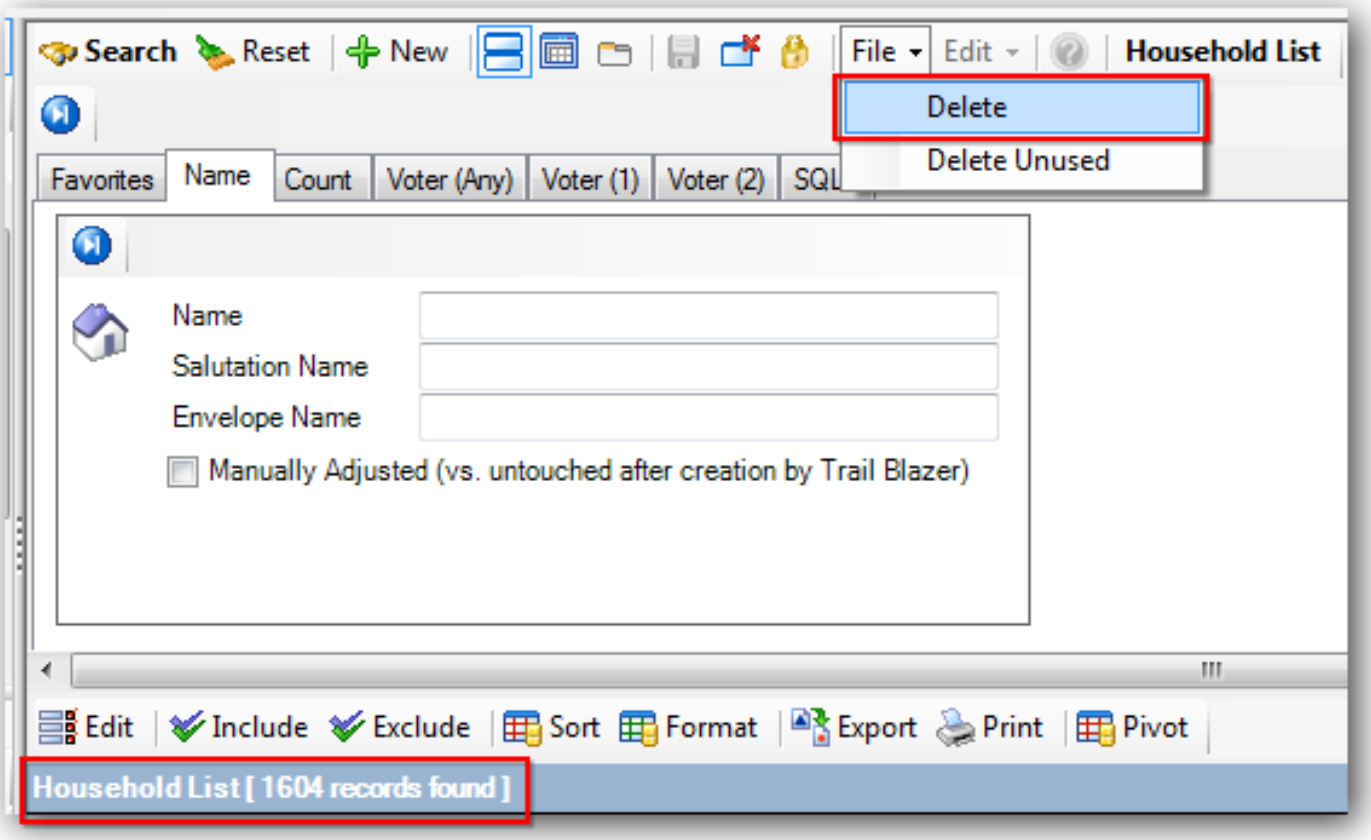
IMPORTANT: As new records are added to your database, you should periodically run householding. This can be done anytime, but at least before you attempt to print letters and before exporting your data as a householded list.

#3 Steps to Delete and Recreate Households

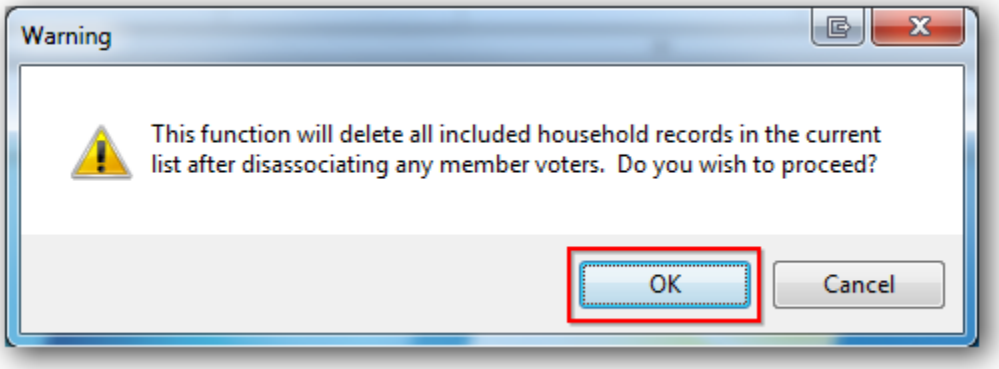
Under the **Application Menu** follow **Voter/Donor > Households** and click **[Search]** to pull down a list of all your **householded records**. *You can also pull up a list of specific household records if you want to delete them in parts rather than as a whole.*



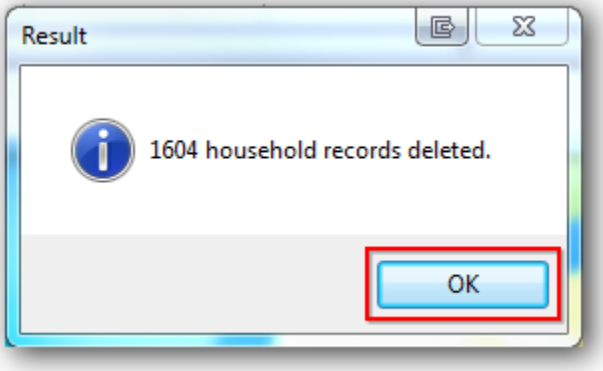
Click the **[File]** drop-down from **search** tool strip and select **Delete**.



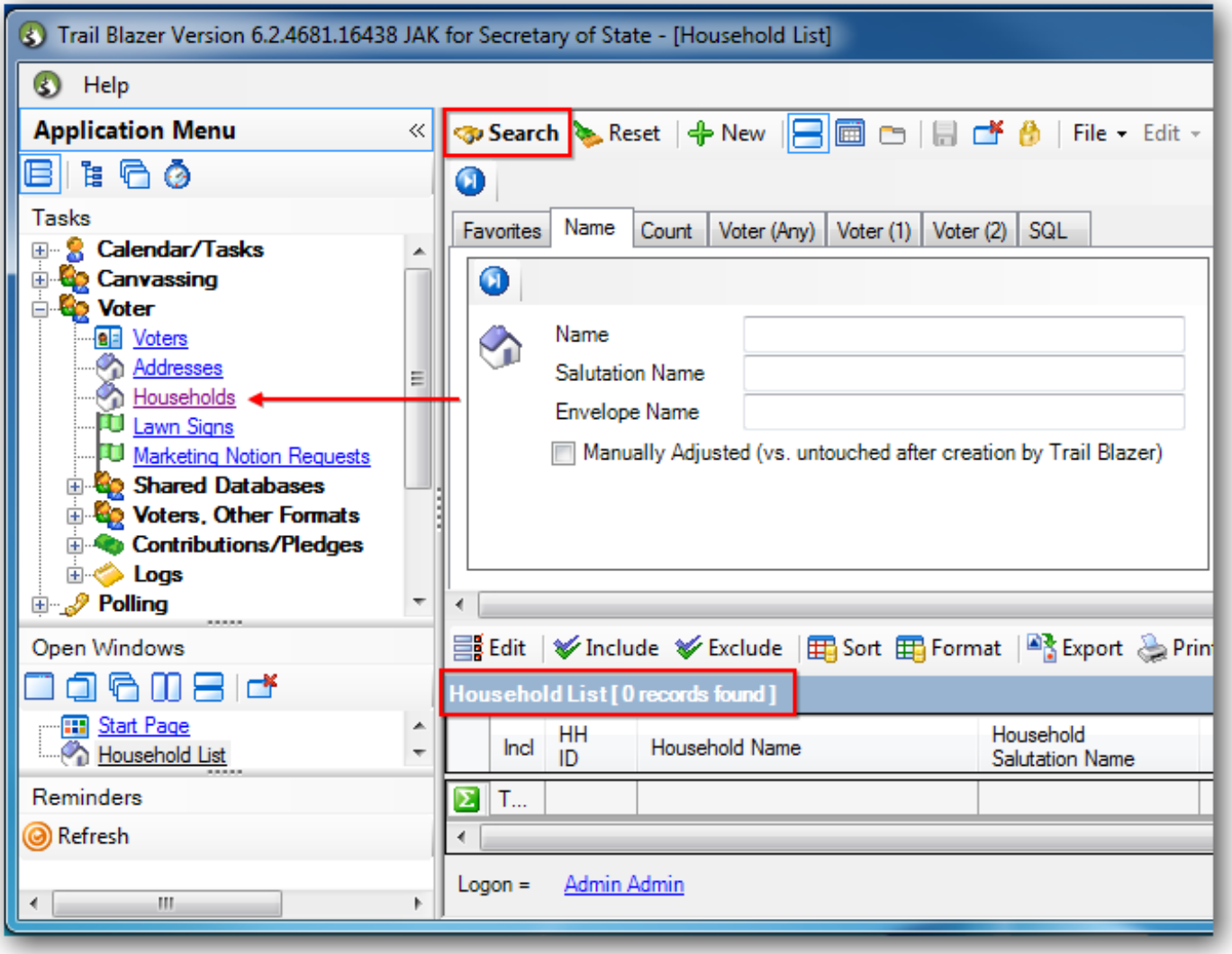
Trail Blazer will prompt you with a warning message click **[OK]** to move forward with **deleting** the householded records in your list. *This does not delete the individual donor/voter/contact record. It deletes ONLY the house hold relationships.*



Let Trail Blazer work its **magic** – it will display the status of the deletion process and it will notify you when the process is complete - with the results; click **[OK]** to proceed.

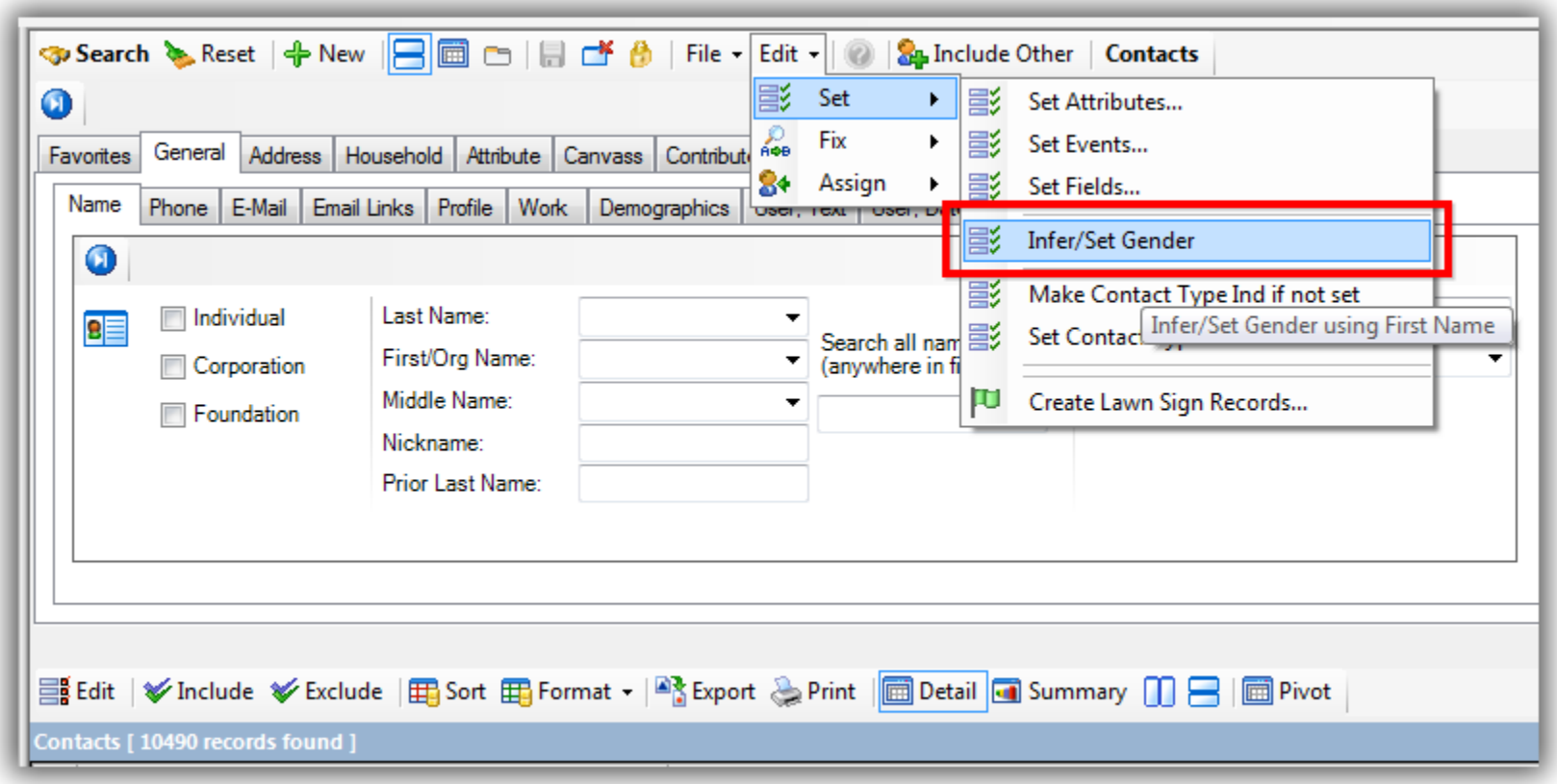


Click **[Search]** from the **household** search window and the record count should now be equal to 0 if you deleted **all household** records.



Now you can go through the same process as described earlier in this document on how to **automatically create household records** by the preferences of your choice.

Tip: Set the age and gender for your records before running householding and you will have a better chance the order of the household members is correct, you can do this from the Donors/Voters list:



#4 Related Resources

Video: Households – Delete and Recreate

Video: Households – Drag n Drop
Video: Households – Combine More Than 5 Members
Article: Splitting Couples Into Separate Records
Article: Household records when last names are different
Article: Household Automatic vs User Managed
Article: Household Export

Trail Blazer Live Support

- **Phone:** 1-866-909-8700
- **Email:** support@trailblz.com
- **Facebook:** https://www.facebook.com/pages/Trail-Blazer-Software/64872951180
- **Twitter:** https://twitter.com/trailblazersoft

** As a policy we require that you have taken our intro training class before calling or emailing our live support team.*

Click here to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.

** After registering you'll receive a confirmation email with the instructions for how to log into the GoToMeeting session where we host our live interactive trainings.*

** This service is included in your contract.*