

Author: Kristenson, Joel Last Updated: 2016-09-19

Overview

This article walks through the steps to **link** contact records in your database together through **relationships**. This is different than tracking <u>household relationships</u> – some examples include the tracking of employees at a corporation, or linking the owner of a business to their business.

Also covered is how to <u>query</u> by relationships (example: You can pull up a corporation, and all of the employees who work at the corporation into the same search query.)

In 2016 there were some major updates to the relationship module:

- You can now create your own relationship types that are different than the list of system defaults
- You can set a date range on a relationship (ex: this person worked at the company for this long)
- The steps to **delete** a relationship have also changed slightly



<u>Steps</u>

Navigate to your **Contacts** list (*Voter/Donor*). Search for and open the record you want to create a relationship for. *I used the Cargill Company in this example.*



2 Run your search query and open the record you are searching for.

Settings Help									_			
Application Menu «		Search	h 🔈 Rese	t 🕂 New 🚍 🛅 😁 🔒 💣	🙆 🗐 File 🗸 Eo	dit 👻 💿 🔝 Include O	ther Contact					
BIRG					Contraction of the second							
Tasks												
Dashboard	Fa	vorites	🥬 Gener	ral Address Household Attribute C	anvass Relation C	ontribute Pledge Event	Sales Log	Admin SQL				
Q Organization	II F.	🔎 Nar	me Phone	E-Mail Email Links Profile Work	Demographics Use	er, Text User, Dates Use	r, Decimal Other					
S Calendar/Tasks												
Eanvassing		0										
4 🎨 Contact		8	Individ	dual Last Name:	-		Title:					
🖬 Contacts 🔶 📘			Corpo	oration First/Org Name:	•	Search all name parts (anywhere in field)	Suffix:		•			
Addresses			Found	Middle Name:	•							
Households Contact Relationships			- round	Nickname:								
Contributions/Pledges				Prior Last Name:								
A Product Sales												
b 🎸 Logs												
Communications	IL											
🛛 👼 Financial												
System Manager		le na l		The second second second								
		Edit	⊞ Sort ⊞	🖥 Format 👻 🚃 Wrap 🛛 🏝 Export 👌	Print Detail	Summary 🕕 😑	Pivot					
	Con	itacts [75 records 1	found]								
		V	ID	First Name		Street	Street	City	State	Zip	Home Phone	Email
	H	_	14702	Abo Com			2	-		Code		
	H		14783	Abc Corp.	-	22000 Deatherst De		D				abc-company
	H		<u>10143</u>	Agency for International Developme		22898 Rachael Dr		Rogers	MN	55374		
			<u>10141</u>	All Saints Parish of The Old Roman	atholic Church	920 Rae Ct		Mendota Heig	MN	55118		
			<u>10122</u>	American Catholic Church		10727 Braewood Cir		Bloomington	MN	55437		
	H		<u>13039</u>	Ameriprise Financial		1 Financial Row		St Paul	MN	55102		
	H		<u>14841</u>	Another Organization to Make Life	<u>Better</u>	600 Washington St		Washington	DC	20201	(993) 555-1229	
	L.		12125	Bank of America Foundation								
	E.		<u>9372</u>	Big Brother Big Sisters								
	L		<u>11100</u>	Brain Injury Association							(321) 321-3213	steve@anderson.com
			<u>11103</u>	Brain Injury Association Iowa								
		V	9248	Cargill		1000 Mcginty Rd		Minnetonka	MN	55305		
	L		10120	Carmelite Mediation Center		257 Saehler Dr		Minnesota City	MN	55959		
			<u>12963</u>	Carmelite Mediation Center		257 Saehler Dr		Minnesota City	MN	55959		
	$\boldsymbol{\nu}$		<u>10133</u>	Catholic Diocese of San Diego		29633 Kraemer Lake Rd		St Joseph	MN	56374		
3 /	1	V	<u>10121</u>	Christian Catholic Church-diocese of	f California	29290 Kraemer Lake Rd		St Joseph	MN	56374		
		V	<u>10144</u>	Corporation for National And Com	nunity Service	8954 Aerie Lake Rd		Alborn	MN	55702		
Click on the		V	<u>12996</u>	Corporation for National And Com	nunity Service	8954 Aerie Lake Rd		Alborn	MN	55702		
contact record			<u>10114</u>	Corpus Christi Roman Catholic Chu	<u>rch</u>	943 Ranae Ln	Apt 6	St Cloud	MN	56301		
contact record		V	<u>10159</u>	Environmental Protection Agency		3803 Ballantrae Rd	Unit 6	Eagan	MN	55122		
to open it.		V	<u>14839</u>	General Motors, Inc.		101 Big Car Rd		Detroit	MI	35101		
		V	11326	Hardware Hank		138 Main St S		Cambridge	MN	55008		
			<u>12975</u>	Hardware Hank		1013 Diamond Willow	Cir	Waite Park	MN	56387		
			10123	Hispanic Catholic Church		942 Ranae Ln	Apt 3	St Cloud	MN	56301		
											1	



Navigate to the **Relation** tab. Here you can view/modify the current relationships for this record. Click [+ New] to begin creating a new one.

11	File	- Edit	• <mark>X</mark> (0 🖸 😓	a 🇞 🞎 G	argill [9248]	_	_		_	_	
	Titl	e:			•			C		Home	Address	
		janizatio Idle (opt		Cargill				No Pr		No A	ddress	
		t Name or Last N t)					•	Email	il Address	Work	Address	
		kname (ntact Typ		Beth Albre			•			1000 Minn) Mcginty Ro ietonka. MN	1 55305
				Gallery Attri		Relation Contrib	ute Pla	edge F	vent Logs Sales	Admin		
		New		🖽 Sort	Format •							
	Rela	_	eate a new		Last Name	First Name	Middle Name	:	He/she is	Start Date	End Date	Note
	Þ	✓	4	<u>9249</u>	Albrecht	Elizabeth	<u>Summe</u>	<u>rs</u>	Employee			
Click [+ New] 🖊 📗		V	<u>6</u> <u>86</u>	<u>9259</u> <u>9221</u>	Kenney Panger	Timothy Mark	<u>Gene</u>		Employee Owner			
to begin creating		V	<u>164</u>	<u>11149</u>	Hill	<u>Rachel</u>			Employee			
		V	<u>192</u>	11318	<u>Horvath</u>	Phyllis Kasar	C		Employee			
a new relationship.		 ✓ 	<u>214</u> <u>252</u>	<u>12664</u> <u>12725</u>	Lesniak Mercer	Karen Cyrstal	<u>Gene</u>		Employer Employee			
	Σ	7										



Search for the contact you're adding a relationship for, and click **[Select]**. *If the contact **doesn't exist** you'll need to create a new one. *In this example I searched for myself 'Joel Kristenson' which was already in the database.*



1. Search for the contact (if they don't exist yet, click [+ New]).

(Find C	Contact												x
	🦘 Searc	:h 🛛 🖂	New											
	Search C	Last First	Name: Name: Ile Name:	[Kristenson	1								
	Contact I	List (1 r	records for	und)										
	Sel	lect	ID	Last Nam		First Name	MI	Address	City	State	Birth Date			
	S	elect	12796	Kriste	enson	Joel		9110 Golden Valley	Golden Valley	MN	4/6/1989			
			^ 2											
												ОК	Cance	
								KNOWLEDGE BASE	www.trailblz.	com/k	h		6	



Select the **relationship type** from the drop-down *if* it exists. You can now click the **[+]** button to create your own relationship types if you need to. You can also record a **note**, and a **date** for the relationship.

Click **[Save]** once you're finished. In my example I select the relationship type of employee, recorded a start date, and a simple note.









Here's my finished *example* list of relationships in the Cargill Co. record card.



The	- Edit	• <mark>X</mark>	0	ه 🗞 ا 🍣	argill [9248]						
Ti	tle:			•		(Home	Address	
Mi	rganizatio ddle (opt	:)	Cargill				Photo		No /	Address	
Pr (o	st Name Ior Last M nt)	Name	Deth All			• Emai	il nail Address		Work	Address	
	ckname (ontact Ty		Beth Alt			•			1000 Minr) Meginty F netonka. M	Rd N 55305
Ger	neral Ho	ousehold	Gallery A	Attribute Poll	Relation Contrib	ute Pledge	Event Logs	Sales	Admin		
_			sh 🎛 So ords found]	ort 🌐 Format 🔻	🚍 Wrap 🛛 🏝	Export	int 🛛 🌐 Pivot				
Ken			ID	Last Name	First Name	Middle Name	He/she is		itart Date	End Date	Note
	V	4	9249	Albrecht	<u>Elizabeth</u>	Summers	Employee				
	V	<u>6</u>	<u>9259</u>	Kenney	Timothy	Gene	Employee				
	V	<u>86</u>	<u>9221</u>	Panger	Mark		Owner				
	V	<u>164</u>	<u>11149</u>	Hill	<u>Rachel</u>		Employee				
	V	<u>192</u>	<u>11318</u>	<u>Horvath</u>	<u>Phyllis</u>		Employee				
	V	<u>214</u>	<u>12664</u>	<u>Lesniak</u>	<u>Karen</u>	Gene	Employer				
	V	<u>252</u>	<u>12725</u>	Mercer		Employee					
►		<u>335</u>	<u>12796</u>	<u>Kristenson</u>	Anders	Employee	7	/16/2013		This relationship was created by JAK on 9/16/16.	
Σ	8										

KNOWLEDGE BASE www.trailblz.com/kb

10

Example new relationship with related details.



If you ever need to delete or modify relationships you'll start by clicking on the **blue relationship 'ID'** hyperlink. In my example I clicked on **ID #4** for Elizabeth Albrecht.



Fi	le - E	dit	• 🗙	0 🖻	📚 🗞 🞎 C	argill [92	248]	_	_	_	_			
	Title:				-							Home	Address	
									D Photo			No A	ddress	
	Last Name (opt) Prior Last Name (ont) Nickname (opt) Beth Albrecht							Em: No E	ail Email Ad	dress		Work	Address	
												1000 Minr) Mcginty I netonka. M	Rd IN 55305
G	eneral	Ho	usehold	Gallery	Attribute Poll	Relation	Contribute	Pledge	Event	Logs	Sales	Admin		
E	- New	v [Refres	sh 🛛 🎛 S	ort 🌐 Format 👻	📑 Wrap								
R	elation	ship	s [8 reco	rds found	i]									
	5	/	ID 🔺	ID	Last Name	First Name		iddle ame	He,	/she is		Start Date	End Date	Note
		7	<u>4</u>	<u>9249</u>	Albrecht	Elizab	<u>eth Su</u>	<u>immers</u>	Emp	oloyee				
		/	6	<u>9259</u>	Kenney	Timoth	<u>ny Ge</u>	<u>ene</u>	Emp	oloyee				
	8	/	<u>86</u>	<u>9221</u>	Panger	Mark			Ow	ner				
		/	<u>164</u>	<u>11149</u>	Hill	Rache	!		Emp	oloyee				
		/	<u>192</u>	<u>11318</u>	<u>Horvath</u>	<u>Phyllis</u>			Emp	oloyee				
	Image: 214 2664 Lesniak Karen						Ge	<u>ene</u>	Emp	oloyer				
	Image: 252 12/25 Mercer Cyrstal								Emp	oloyee				
	☑ 335 127.6 Kristenson Joel .					Ar	nders	Emp	oloyee		7/16/2013		This relationship was created by JAK on 9/16/16.	
	8													

KNOWLEDGE BASE <u>www.trailblz.com/kb</u>

12

To modify or delete a relationship click on the 'Relationship ID'. (In this



Click the red [X] at the top of the popup screen to delete the relationship. You can also modify the data and save again if that's your intent. In this example I deleted the relationship.

Click the red [X] to delete the relationship. (This will not delete the person's record, just the link between the two recrds).

[4] Contact Rela	tion C	X
File - Edit -		
Name:	Elizabeth Albrecht Delete this record.	
He/she is:	Employee [of Employer]	
Start Date:		🖃 🙆
End Date:		
Note:		
	Sav	re OCancel

Click **[OK]** when prompted, if you wish to proceed.





Here's my finished *example* after the relationship was purged.



Fil	e → Edit	• X	0 🖻 🖇	🍃 🗞 울 Ca	rgill [9248]	_	_			
Т	itle:			•		6		Home	Address	
)rganizatio		Cargill				5	No A	ddress	
	liddle (optj ast Name					▼ No P	hoto			
6	rior Last N ant)					Email No Ema	ail Address	Work	Address	
	lickname (Contact Typ		Beth Albr			•		1000 Minn	Mcginty R etonka. MN	d I 55305
	ontact Ty	<i>.</i>	Corporat	1011						
							vent Logs Sale	es Admin		
-		_	ds found]	t 🌐 Format 🝷	≣a wiap —⊇ t	xport 🥥 Prin				
[V	ID 🔺	ID	Last Name	First Name	Middle Name	He/she is	Start Date	End Date	Note
		<u>6</u>	9259	<u>Kenney</u>	Timothy	Gene	Employee			
		<u>86</u>	<u>9221</u>	Panger	Mark		Owner			
	V	<u>164</u>	<u>11149</u>	Hill	<u>Rachel</u>		Employee			
		<u>192</u>	<u>11318</u>	<u>Horvath</u>	<u>Phyllis</u>		Employee			
	V	<u>214</u>	<u>12664</u>	<u>Lesniak</u>	<u>Karen</u>	<u>Gene</u>	Employer			
		<u>252</u>	<u>12725</u>	Mercer	<u>Cyrstal</u>		Employee			
	V	<u>335</u>	<u>12796</u>	<u>Kristenson</u>	<u>Joel</u>	Anders	Employee	7/16/2013		This relationship was created by JAK on 9/16/16.
	7									

After deleting a relationship it will remove the contact's name from this list, BUT If Will MOT delete the contact's record in your database.



The next steps show how to **query by relationships**.

Navigate to your Contacts (Voters/Donors) list.



Query for your contact, in my example I used Cargill again.



Build and run your search query for the contact you want to search relationships for.

	🗇 Search 🔈 Reset 🕂 New 🚍 📾 🗁 🖶 🖆 🍥 📦 File ▾ Edit ▾ ⊘ Su Include Other Contacts													
				Admin SQL										
	Favorites Image: General Address Address Household Attribute Canvass Relation Contribute Pledge Event Sales Log Admin SQL Image: Name Phone E-Mail Email Links Profile Work Demographics User, Text User, Dates User, Decimal Other													
 Individual Corporation Foundation Hidle Name: Wickname: Prior Last Name: 														
Contacts [1 records found]														
	First Name Street	Street 2 City	State	Zip Code Email	Employer/Company Name									
▶ 🛛 9248 🖸 C.	Cargill 1000 Mcginty Rd	Minneto	onka MN	55305										
2 1														

Click on the [+ Include Other] button on the Search Tool Strip.



Click on this button to add relationship criteria to your search query.

_	🔊 Search 🌭 Reset 🕂 New 🔚 🗐 🗁 🗐 🖆 🤌 🏢 File 🕶 Edit 🕶 🕖 🎥 Include Other Contacts													
-	Searc	h 🌭 Re	eset 🕂 New	/ 😑 🖻 🕒 🎚	🛛 🜁 🤔 順 File 🗸 Edit -	- 🕜 🎥	Include Other	Contact	5					
0														
	Favorites 🌾 General Address Household Attribute Canvass Relation Contribute Pledge Event S Include other contacts in search results.													
	Avoiries Phone E-Mail Email Links Profile Work Demographics User, Text User, Dates User, Decimal Other													
	Name Phone E-Mail Email Links Profile Work Demographics User, Text User, Dates User, Decimal Other Image: Ima													
	Individual Last Name: Search all name parts A													
		Cor	poration	First/Org Name:	Cargill	rch all name where in fiel	d) Suffix:			•				
		Fou	undation	Middle Name:										
				Nickname:										
				Prior Last Name:										
1L														
=	Edit	🌐 Sort	🔠 Format 🔹	🕶 🧱 Wrap 🛛 🏝 Exp	port Print 🕅 Detail 🖪	Summary	🕕 🚍 🥅 Piv	/ot						
Con	tacts [1 records	s found]											
	V	ID	Last Name	 First Name 	Street	Street 2	City	State	Zip Code	Email	Employer/Company Name			
►	V	<u>9248</u>		<u>Cargill</u>	1000 Mcginty Rd		Minnetonka	MN	55305					
$\mathbf{\Sigma}$	1													

Below are descriptions for the different options you have in this area.

Include Other Contacts Options



- Include other contacts in household.
 - If you've previously run householding, you can use this option to pull up just the people who are part of the contact's household.
- Include other contacts with same home address.
 - This is a good option if you haven't yet householded your database, more typical for large voter databases.
- Include contacts connected through relationship records.
 - Choose from specific or multiple relationship types to query by i.e. Employer, Employee, Business Owner, Cousin, Colleague, All Relationship Types, etc.

For the purpose of this article, you'll skip the first two options, and just check the **3rd box** for **'Include contacts connected through relationship records'**.



	Include Other Contacts		B
Check this box to add relationship criteria into your search query. (By default all types will be checked).	 Include other contacts in household. Include other contacts with same home address. Include contacts connected through relationship records. Other contact is Affiliated Organization Assistant Campaign Manager [of Organization] Assistant Treasurer [of Organization] Aunt [of Niece] Aunt [of Nephew] Board Member [of Organization] Boyfriend [of Girlfriend] Brother [of Sister] Brother Brother-In-Law [of Sister-In-Law] Business [of Owner] Business Commonly Owned 	С С С С С К	_

You'll notice that by default all the relationship types are checked, which isn't a bad option if you want to pull up any record that is linked to the original record you searched by. For this example I cleared all check boxes using the sweeper brush button, and just checked the box for Employee [of Employer]. Click [OK] once you've made your selection. You'll still need to click [Search] on the following screen to update the list of records in the grid.





3. Click [OK] once your'e finished. You'll still NEED to click [Search] on the next screen to refresh the search.



Click [Search] to refresh your query. I was returned with a total record count of 6 (1 corporation, and 5 'linked' employee records).



22



Note: To view a list of all your relationships and further analyze them you can view the **Relationships** list under the **Application Menu**. *In my example I had 328.*



Search the 'Relationships' list to view all of your relationships with related information.

Settings Help													
Application Menu «	🧇 S	earc	h Reset 🛛	🕂 New 📃 🗖		🙆 🕼 F	ile - Edit - 🛛 🕜 🛛 🕻	ontact Relatio	nships				
BBG				• (
Tasks	· · · ·												
> III Dashboard	Favo	orites	General Cont	tact SQL									
Organization													
Calendar/Tasks			Relation Type:		10 1 2								
Canvassing	🧧	5	noiddon rype.		d Organization nt Campaign Mana	ager [of Orga	nization] 📩 🗮						
⊿ 🎨 Contact					nt Treasurer [of O								
Contacts				Aunt [of Aunt [of	Nephew]		<i>"</i>						
Households					Intecej lember [of Organi:	zationl	-						
Contact Relationships					d [of Girlfriend]		-						
Contributions/Pledges													
Product Sales	\												
þ 🍅 Logs													
Communications	E	dit	🖽 Sort 🌐 Fo	ormat 👻 🔄 Wra	p 🏽 📲 Export 👌	🍃 Print 🛛 🎛	Pivot						
Financial	Conta	act Re	elationships [32	28 records found	1								
b 🍇 System Manager		-	Contact	Left Side	Left Side			Date	Date	Right Side	Right Side		
	11	V	Relationship ID	Last Name	First Name	MI	Description	Started	Started	Last Name	First Name	MI	Note
	►	V	<u>336</u>		<u>Cargill</u>		Employer	7/16/2013		<u>Kristenson</u>	Joel	Anders	This relationship was created by JAK on 9/16/16.
		V	<u>335</u>	Kristenson	Joel	Anders	Employee	7/16/2013			<u>Cargill</u>		This relationship was created by JAK on 9/16/16.
		V	<u>334</u>	Silvers	<u>Denise</u>		Mother			Silvers	<u>Franky</u>		
		V	<u>333</u>	Silvers	Franky		Son			Silvers	<u>Denise</u>		
		V	<u>332</u>	Daigle	Jazz		Friend			Zippy	<u>Frank</u>		
		V	<u>331</u>	Zippy	Frank		Friend			Daigle	Jazz		
		V	<u>330</u>	Daigle	Jazz		Grandfather			Daigle	Amy		Son's 2nd daughter.
		V	<u>329</u>	Daigle	Amy		Granddaughter			Daigle	Jazz		Son's 2nd daughter.
		<	<u>328</u>	Daigle	Jazz		Organization	2/12/1958	6/8/1964	Worsley	<u>Frank</u>		Former ship captain, and president of the board.
		V	<u>327</u>	Worsley	<u>Frank</u>		Board Member	2/12/1958	6/8/1964	Daigle	Jazz		Former ship captain, and president of the board.
		V	<u>326</u>	Daigle	Jazz		Nephew			Daigle	Suzy		Married to brother.
		V	<u>325</u>	Daigle	Suzy		Aunt			Daigle	Jazz		Married to brother.
		V	<u>324</u>	Daigle	Jazz		Business Partner			How	Walter	<u>E.</u>	Helped found Shell Exploration Co.
		V	323	How	Walter	<u>E.</u>	Business Partner			Daigle	Jazz		Helped found Shell Exploration Co.
		V	322	Daigle	Jazz		Cousin			Holness	Ernest		First Cousin (Fireman/Stoker)
		V	<u>321</u>	Holness	Ernest		Cousin			Daigle	Jazz		First Cousin (Fireman/Stoker)
		V	<u>320</u>	Daigle	Jazz		Colleague			Greenstreet	Lionel		First Officer
			<u>319</u>	Greenstreet	Lionel		Colleague			Daigle	Jazz		First Officer
		V	318	Daigle	Jazz		Colleague			Green	Charles	<u>J.</u>	Cook
		_	317	Green	Charles	<u>J.</u>	Colleague			Daigle	Jazz		Cook
			316	Daigle	Jazz		Colleague			Crean	Thomas		Second Officer
		_	315	Crean	Thomas		Colleague			Daigle	Jazz		Second Officer
		V	314	Daigle	Jazz		Colleague			Clark	Robert	<u>S.</u>	Biologist
			313	Clark	Robert	<u>s.</u>	Colleague			Daigle	Jazz		Biologist
			312	Daigle	Jazz	_	Colleague			Cheetham	Alfred	<u>N.</u>	Third Officer
		-											



TIP: A little trick to quickly get a list of other records that share the same home address as the record you've searched for in your list is to simply right-click on the record which will bring up a context menu with a few options, one of which is to list all other contacts that live at that address. Here's an example (3 images) for Christopher Alden:

Img 1 of 3 – pull up a contact into your list



🖳 Settings Help												_
Application Menu «	🤝 Search	n 🔖 Reset 🕂 N	ew 🔚 🗐 🗂 🖡	📑 🚷 📢	File + Edit +	🛛 🕜 🛛 🏭 Include	Other Cont	acts				
	0											
Tasks	Favorites	🖉 General Addre	ess Household Attrib	ute Canvass F	elation Contrib	ute Pledge Event	Sales Loc	Admin S	0			
Dashboard									ALC .			_
> 🍫 Organization	Nar 🎾 Nar	me Phone E-Mail	Email Links Profile	Work Demogra	phics User, Te	kt User, Dates Us	ser, Decimal 0	ther				
Calendar/Tasks	0											
Eanvassing			1				1					
⊿ 🎨 Contact	8	Individual	Last Name:	Alden	•	h all name parts	Title:					
Contacts		Corporation	First/Org Name:	Christopher		n all name parts /here in field)	Suffix:		•			
Addresses		Foundation	Middle Name:		-							
Mouseholds		Foundation	Nickname:									
Contact Relationships			Prior Last Name:									
 Contributions/Pledges Product Sales 			FIIOI Last Name.									
Product Sales Solution Series Solution Series												
Constructions												
System Manager												
y system manager	Edit	🎛 Sort 🖽 Format	t 👻 📑 Wrap 🛛 🐴 Ex	port 🚵 Print	🛅 Detail 🗔	Summary 🔲 🚍	📰 Pivot					
Open Windows		1 records found]										_
	contacts [
		ID Title	Last Name 🔺	First Name	Address Type	Street		Street 2	City	State	Zip Code	Hon Pho
Start Page Contacts		72	Alden	Christopher	1	6217 France Ave S	5		Edina	MN	55410	(952)
	2 1											

Search for and load a single contact record into your list.

Img 2 of 3 – right-click and select to list all other contacts at that same address





🖘 Search 🗞 Reset 🕂 New 🚍 🛅 😁 🔒 🜁 😚 🥡 File ▾ Edit ▾ 🕖 🝰 Include Other Contacts																	
Fa	avorites	🎾 General	Address	Household Attri	bute Canvass	Relation	Contribute	Pledge	Event	Sales	Log	Admin	SQL				
Name Phone E-Mail Email Links Profile Work Demographics User, Text User, Dates User, Decimal Other																	
	0																
		Individual		Last Name:	Alden	•				Title:				_			
	8	Corporati		First/Org Name:	Christopher	•	Search al (anywher	Iname par e in field)	ts	Suffix:				-			
		Foundatio		Middle Name:		-	(2)		_								
		- reandure		Nickname:					Ria	ht-d	lic	e an	d se	elect th	ne or	otion	
	Prior Last Name: Right-click and select the option												·				
	for people who live at the same																
									hor	ne a	add	ress					
	📑 Edit 🔠 Sort 🌐 Format 👻 🔄 Wrap 🌁 Export چ Print 🕅 Detail 🗃 Summary 👖 🚍 🗐 Pivot																
	Edit	I Sort I F	ormat •	🔄 Wrap 🛛 🐴 E	xport 🚵 Print	🕅 Detai	I 🗔 Sum	mary 🔟		📰 Pivo	t	/					
				🚽 📑 Wrap 🛛 🏝 E	xport Print	🕅 Detai	I 🖪 Sum	imary 🚺	8	🧰 Pivo	t	/					_
	ntacts (1 records foun	d]			Detai) 8	📺 Pivo	/	Etwart 2	6	hu .	State	Zip	Hor
Col	ntacts (1 records foun ID Tit	d]	Last Name 🔺	First Name		ess Si	reet		📄 Pivo	/	Street 2	Ci	ty	State	Zip Code	Pho
Col	ntacts (1 records foun ID Tit	d]			Addre	ess Si			Pivo	/			ty with same fir:		Code	
Col	ntacts (1 records foun ID Tit	d]	Last Name 🔺	First Name	Addre	ess Si	reet		Pivo		List all C	ontacts		st/last nar	Code	Pho
Col	ntacts (1 records foun ID Tit	d]	Last Name 🔺	First Name	Addre	ess Si	reet		Pivo		List all C List all C	ontacts ontacts	with same fire	st/last nar	Code	Pho
Col	ntacts (1 records foun ID Tit	d]	Last Name 🔺	First Name	Addre	ess Si	reet		Pivo		List all C List all C	ontacts ontacts	with same fire at this addres	st/last nar	Code	Pho
Col	ntacts (1 records foun ID Tit	d]	Last Name 🔺	First Name	Addre	ess Si	reet		Pivo		List all C List all C	ontacts ontacts	with same fire at this addres	st/last nar	Code	Pho



Img 3 of 3 – all contacts at that address will populate in the grid, in this ex it was a total of 5 people



🦘 Search 🔖 Reset 🕂 New 🔚 🗐 🗁 🔒 ा 6 🦗 🙀 File 🗸 Edit 🖌 🕜 🎥 Include Other Contacts												
Fa	Favorites General 🗡 Address Household Attribute Canvass Relation Contribute Pledge Event Sales Log Admin SQL											
	Name Phone E-Mail Email Links Profile Work Demographics User, Text User, Dates User, Decimal Other											
		Individual Corporation		Last Name: First/Org Name:		•	rch all name parts where in field)		Title:			
	8					Sear			Suffix:		•	
			M		e Name:							
	Foundation		Nickr	iame:								
	Prior Last Name:											
	📑 Edit 🌐 Sort 🌐 Format 🝷 🚍 Wrap 🐴 Export 🔈 Print 🥅 Detail 🖪 Summary 🕕 🚍 🥅 Pivot											
Con	Contacts [5 records found]											
	V	ID	Last Name		First Name	Street	City	State	Zip Code	Home Phone	Email	Employer/Company Name
►		72	Alden		Christopher	6217 France Ave S	Edina	MN	55410	(952) 928-9017	Christopher@Alden.com	
	V	<u>73</u>	Alden		<u>John</u>	6217 France Ave S	Edina	MN	55410	(952) 928-9017	John@Alden.com	
	V	<u>74</u>	Alden		<u>John</u>	6217 France Ave S	Edina	MN	55410	(952) 928-9017		
		<u>75</u>	Alden		Mary	6217 France Ave S	Edina	MN	55410	(952) 928-9017	Mary@Alden.com	
	V	<u>13105</u>	Gordon		<u>Jessica</u>	6217 France Ave S	Edina	MN	55410			
Σ	5											



The related resources below link to a variety of other videos and articles related to this topic.



- YouTube Channel

- Knowledge Base Articles

- 3rd Party Resources



Related Resources

Article: Delete a Relationship Article: How to Split a Single Contact Record into a Duplicate Contact Record for Householding a Couple Article: Splitting 'Couples' into Separate Records En Masse using the Built-In Utility Article: Managing Households – Creating, Deleting, and Re-creating **Article:** Automatically Conform Addresses **Article:** Address Management Article: Why won't some of my records merge? Article: Address Normalization (unlimited addresses per person) Article: Save and Load a Search Query as a (Dynamic) Search Favorite Article: SQL Wildcards Article: Advanced Queries – the SQL Tab Article: Delete Saved Search Queries Video: Households – What To Do B4 Householding!! Video: Households – Delete and Recreate Video: How to Manage Duplicates Video: Households – Drag n Drop Video: Households – Combine More Than 5 Members Video: Video Playlist on Queries



Trail Blazer Live Support

- **C** 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.

<u>*Click here*</u> 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 <u>GoToMeeting</u> session where we host our live interactive trainings.

* This service *is* included in your contract.