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Overview

This article will teach you how to **manually** create and manage **households**. *This article demonstrates how to perform this task **from scratch**, **without** running the **automated household** utility prior.*

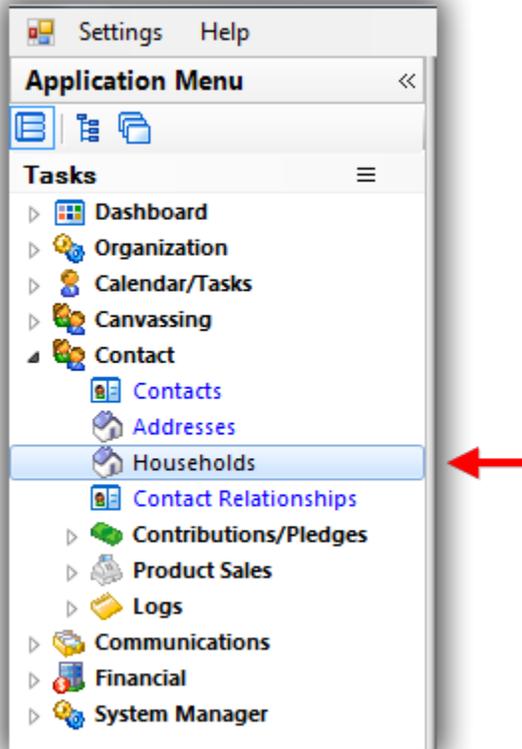
If you've already householded your database using the automated utility this article can still be useful if you need to **remove someone from a household (e.g. they [passed away](#)), **manually add** another member, or if you need to further **customize** the household **envelope/salutation** names to use when [printing](#) through **Trail Blazer**.*

 **Tip:** Watch [this video](#) to learn what to do **before householding**, and read section #2 of [this article](#) to learn how to **automatically household** your database.

Steps

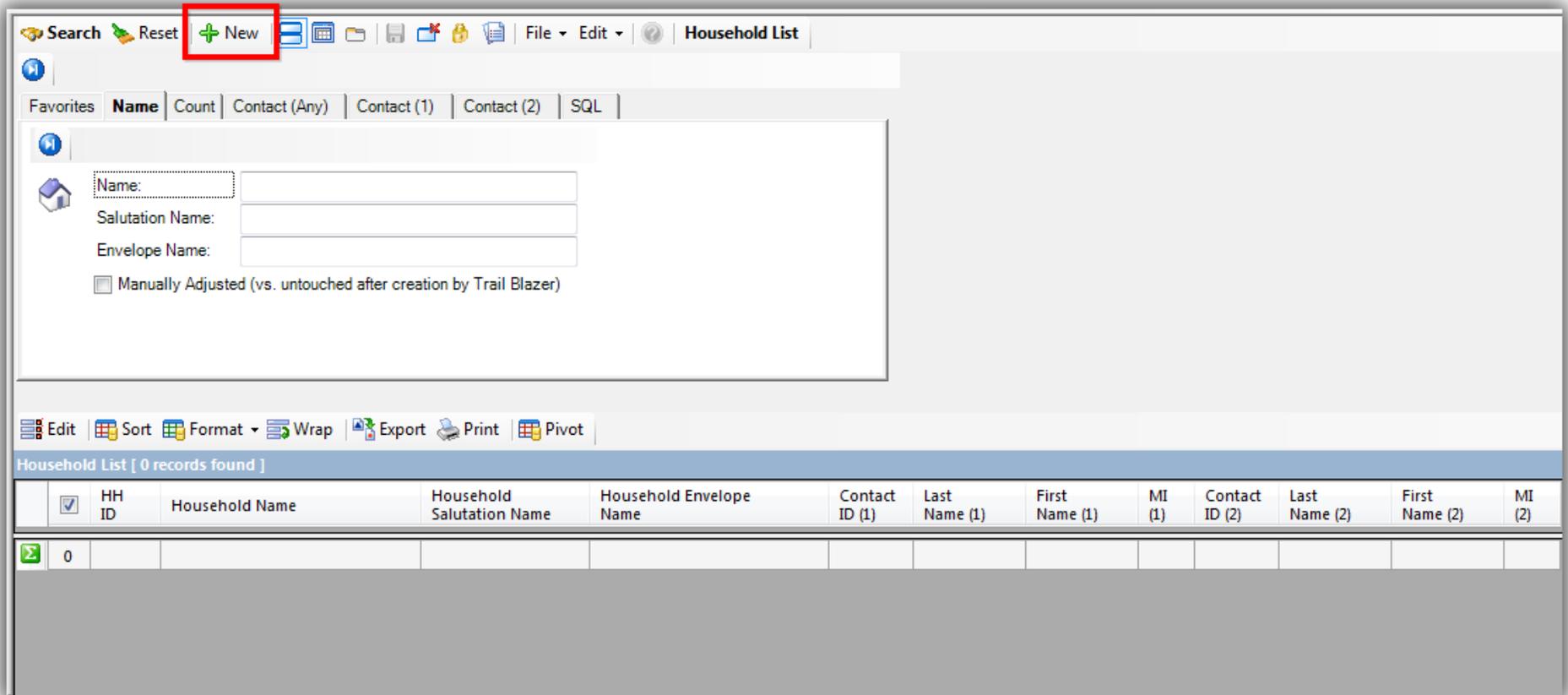
Navigate to the **Households** list.

How to Manually Create Households, Remove a Person from a Household, and How to Customize the Envelope/Salutation Fields for Mail-Merge



Click [+ New] from the search tool strip. *It's not a bad idea to run a [search query](#) by the household name to **verify** that the household **doesn't exist** already.*

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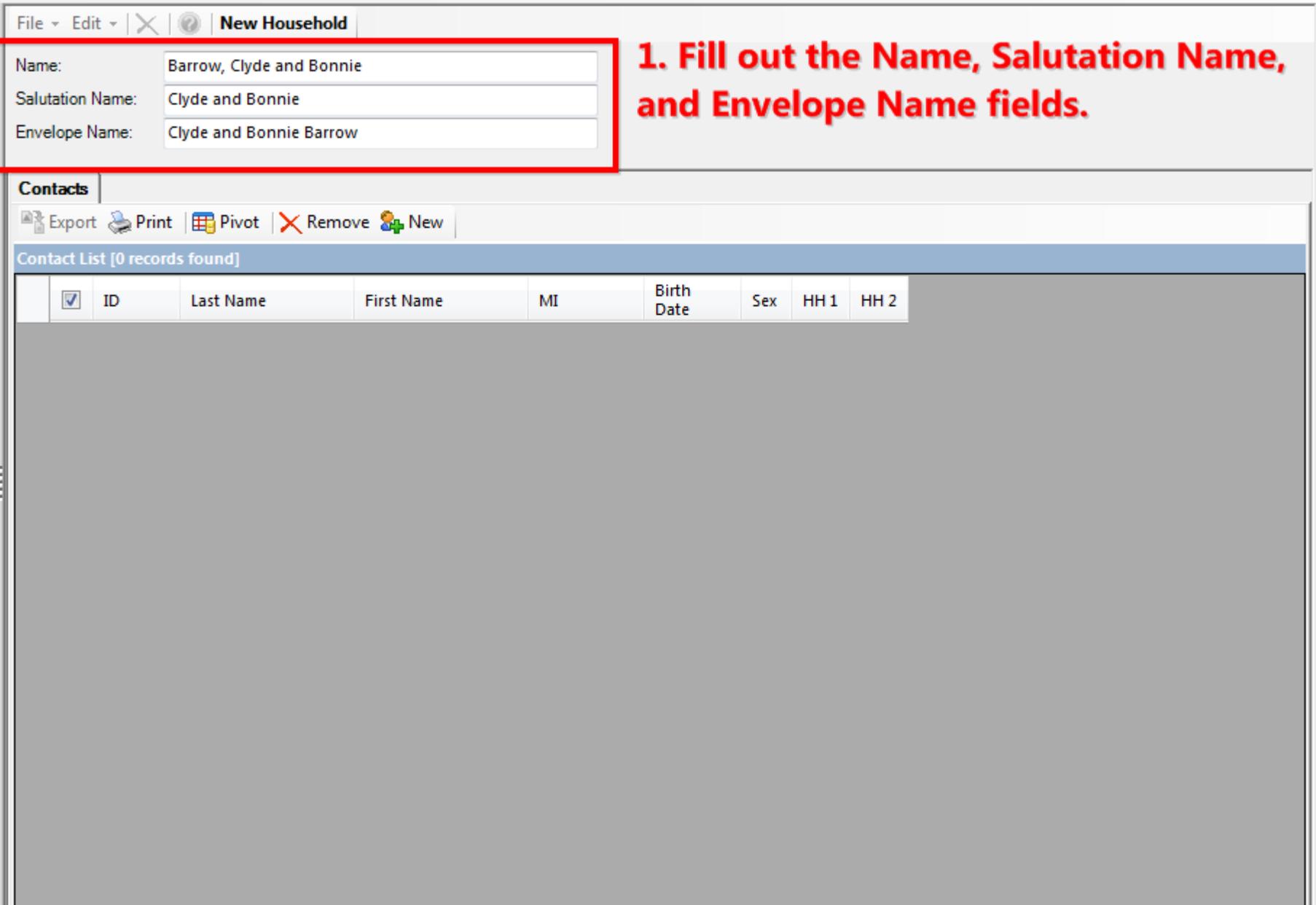


The screenshot shows the TrailBlazer software interface. The 'New' button in the top toolbar is highlighted with a red box. Below the toolbar, there is a 'Household List' section with a form for creating a new household. The form has fields for 'Name', 'Salutation Name', and 'Envelope Name', and a checkbox for 'Manually Adjusted (vs. untouched after creation by Trail Blazer)'. Below the form is a table with columns for household details and contact information.

	HH ID	Household Name	Household Salutation Name	Household Envelope Name	Contact ID (1)	Last Name (1)	First Name (1)	MI (1)	Contact ID (2)	Last Name (2)	First Name (2)	MI (2)
	0											

Fill out the fields for **Name**, **Salutation Name**, and **Envelope Name**. Click **[Save]** once you're finished. *My example is below which demonstrates the typical naming convention that's used in Trail Blazer for households.*

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1. Fill out the Name, Salutation Name, and Envelope Name fields.

Contacts

Export Print Pivot Remove New

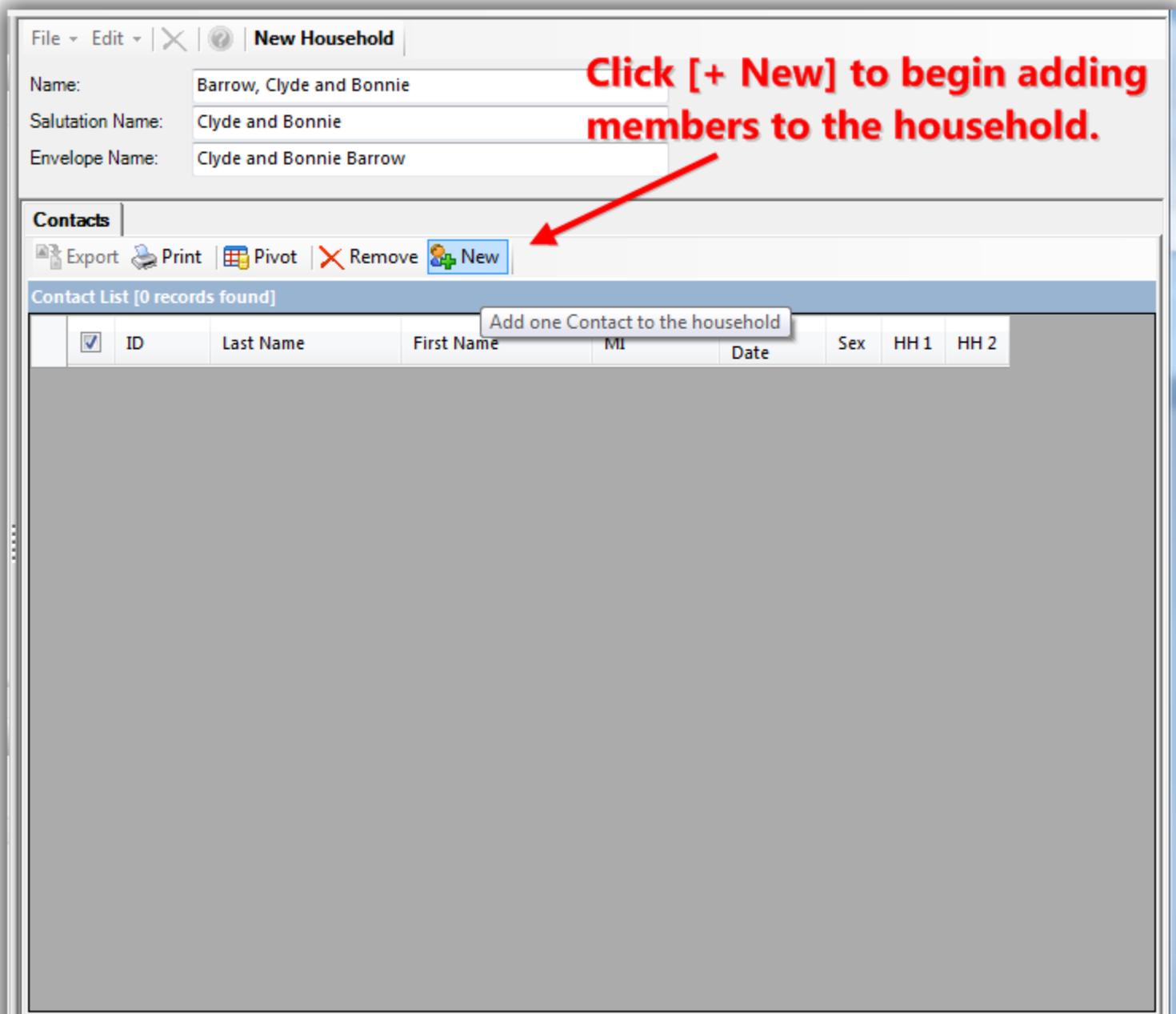
Contact List [0 records found]

<input checked="" type="checkbox"/>	ID	Last Name	First Name	MI	Birth Date	Sex	HH 1	HH 2
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Click **[+ New]** to begin adding members to the household.

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Click [+ New] to begin adding members to the household.

Contacts

Export Print Pivot Remove **New**

Contact List [0 records found]

<input checked="" type="checkbox"/>	ID	Last Name	First Name	MI	Date	Sex	HH 1	HH 2
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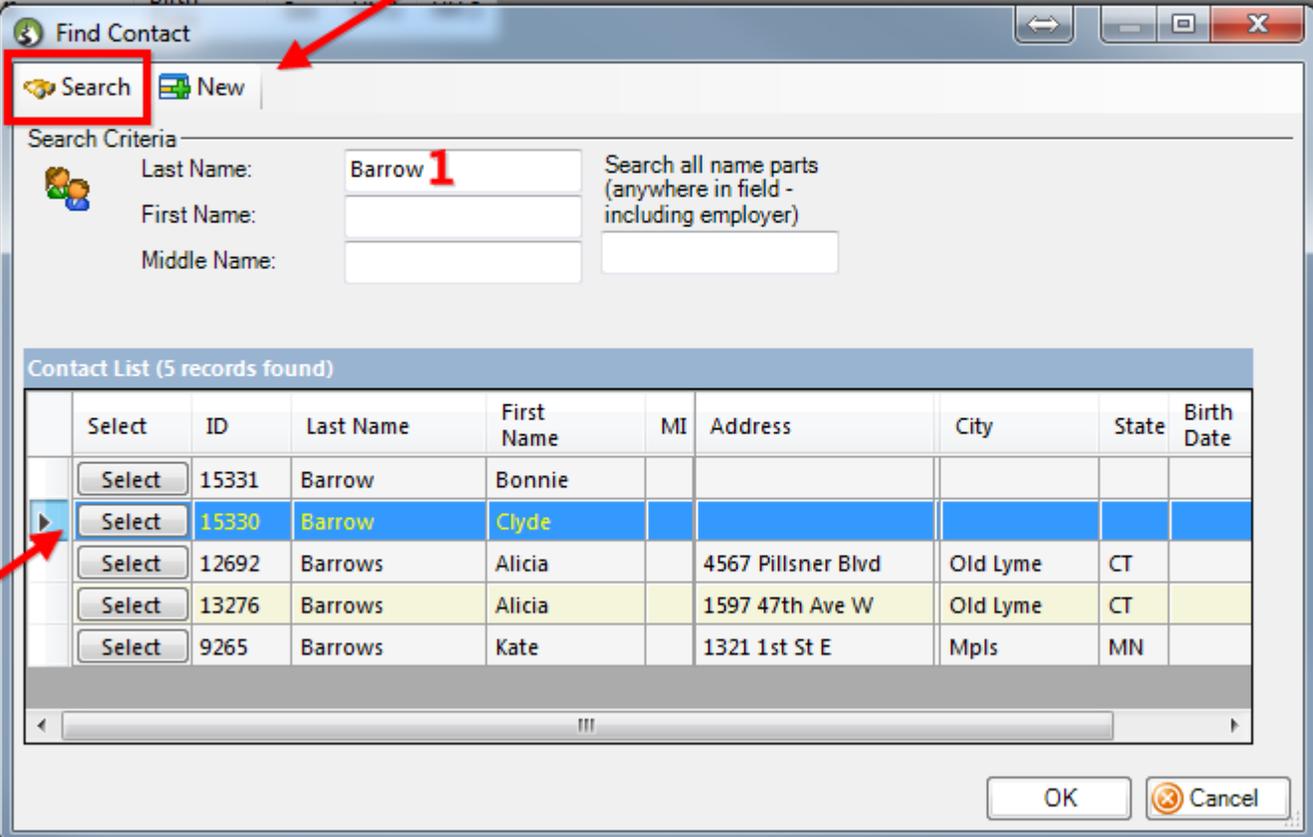
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Run a **search** for the contact and select them from the list. If they don't exist you'll need to click **[+ New]** to add them. *My example is below where the person already existed.*

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(*if the contact doesn't exist you'll need to add them as a new record)

2



3

Find Contact

Search New

Search Criteria

Last Name: Barrow 1

First Name:

Middle Name:

Search all name parts (anywhere in field - including employer)

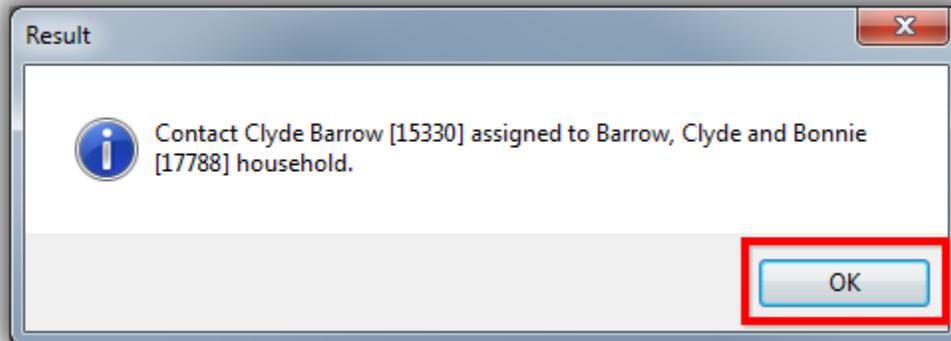
Contact List (5 records found)

Select	ID	Last Name	First Name	MI	Address	City	State	Birth Date
Select	15331	Barrow	Bonnie					
Select	15330	Barrow	Clyde					
Select	12692	Barrows	Alicia		4567 Pillsner Blvd	Old Lyme	CT	
Select	13276	Barrows	Alicia		1597 47th Ave W	Old Lyme	CT	
Select	9265	Barrows	Kate		1321 1st St E	Mpls	MN	

OK Cancel

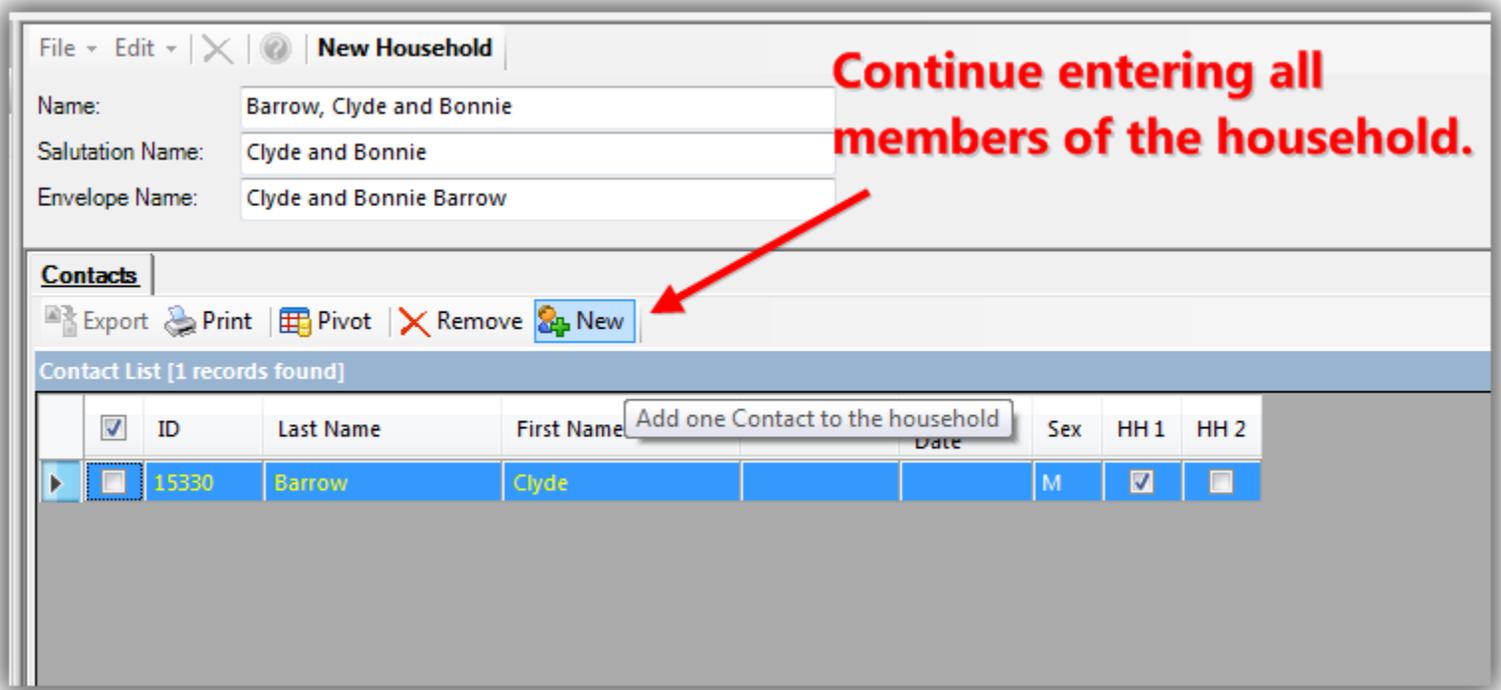
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Click **[OK]** when prompted.



Repeat this step until all members of the household are added. *In my example I added one more person.*

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Continue entering all members of the household.

Name: Barrow, Clyde and Bonnie
Salutation Name: Clyde and Bonnie
Envelope Name: Clyde and Bonnie Barrow

Contacts

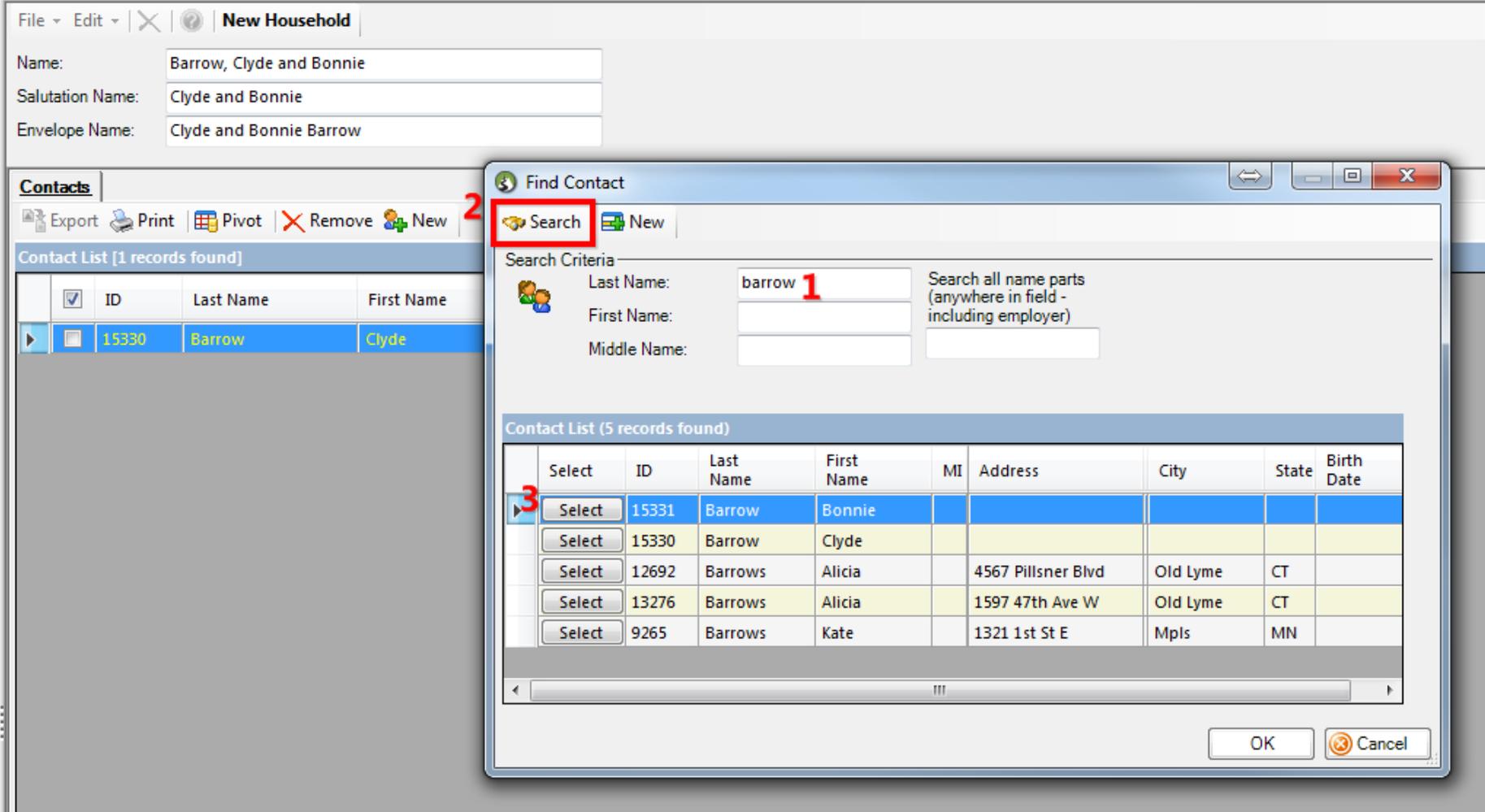
Export Print Pivot Remove **New**

Contact List [1 records found]

<input checked="" type="checkbox"/>	ID	Last Name	First Name	Date	Sex	HH 1	HH 2
<input type="checkbox"/>	15330	Barrow	Clyde		M	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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Continue to add all members of the household.



The screenshot shows the TrailBlazer interface. In the background, a 'New Household' window is open with the following fields:

- Name: Barrow, Clyde and Bonnie
- Salutation Name: Clyde and Bonnie
- Envelope Name: Clyde and Bonnie Barrow

In the foreground, a 'Find Contact' dialog box is open. The 'Search' button is highlighted with a red box and labeled '2'. The 'Search Criteria' section has 'barrow' entered in the 'Last Name' field, which is also labeled with a red '1'. Below this is a table of search results labeled 'Contact List (5 records found)'. The first row is highlighted in blue and labeled with a red '3'.

Select	ID	Last Name	First Name	MI	Address	City	State	Birth Date
Select	15331	Barrow	Bonnie					
Select	15330	Barrow	Clyde					
Select	12692	Barrows	Alicia		4567 Pillsner Blvd	Old Lyme	CT	
Select	13276	Barrows	Alicia		1597 47th Ave W	Old Lyme	CT	
Select	9265	Barrows	Kate		1321 1st St E	Mpls	MN	

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Click **[Save and Close]** once you're finished.

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File ▾ Edit ▾ | | | **New Household**

Name:

Salutation Name:

Envelope Name:

Contacts

Export
 Print
 Pivot
 Remove
 New

Contact List [2 records found]

<input checked="" type="checkbox"/>	ID	Last Name	First Name	MI	Birth Date	Sex	HH 1	HH 2
<input type="checkbox"/>	15330	Barrow	Clyde			M	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	15331	Barrow	Bonnie			F	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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That concludes the steps.

Continue reading to learn how to **view** household relationships **within** a contact's record card and how to **open** the household record to **modify** it from there.

Navigate to the Contacts (Voters/Donors) list, [query](#) for the person you created a household for and **open** their record card.

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Search for an open of the contacts that you added to the household record.

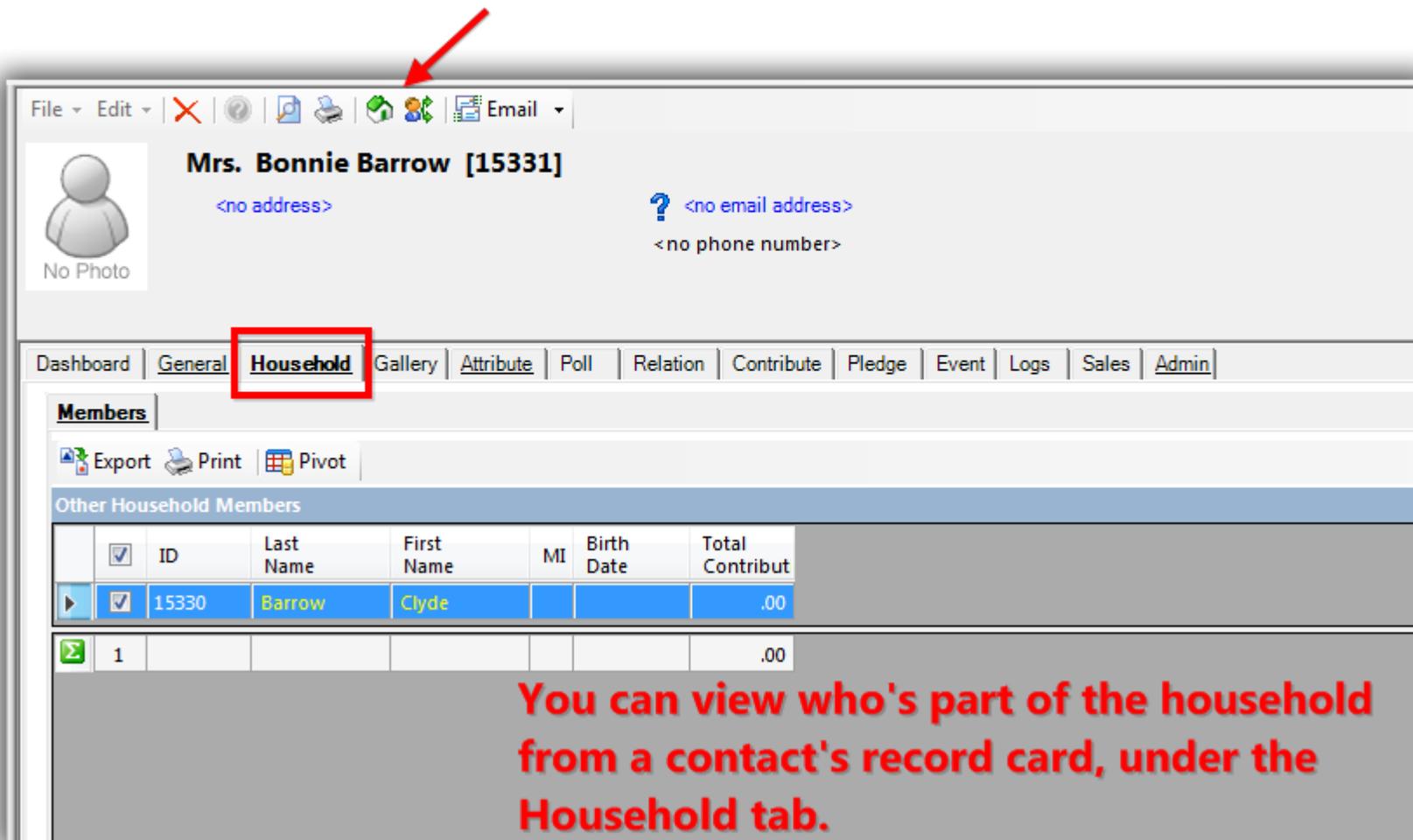
The screenshot shows the TrailBlazer software interface. On the left is a 'Tasks' sidebar with a tree view containing 'Dashboard', 'Organization', 'Calendar/Tasks', 'Canvassing', 'Contact', 'Contributions/Pledges', 'Product Sales', 'Logs', 'Communications', 'Financial', and 'System Manager'. The 'Contact' folder is expanded, and 'Contacts' is selected, indicated by a red arrow labeled '1'. The main window has a top toolbar with a 'Search' button highlighted by a red box and labeled '3'. Below the toolbar are tabs for 'General', 'Address', 'Household', 'Attribute', 'Canvass', 'Relation', 'Contribute', 'Pledge', 'Event', 'Sales', 'Log', 'Admin', and 'SQL'. The 'General' tab is active, showing a form with fields for 'Individual', 'Corporation', and 'Foundation' (all unchecked). The 'Last Name' dropdown is set to 'Barrow' and is highlighted with a red '2'. Other fields include 'First/Org Name', 'Middle Name', 'Nickname', 'Prior Last Name', 'Title', and 'Suffix'. Below the form is a toolbar with 'Edit', 'Sort', 'Format', 'Wrap', 'Export', 'Print', 'Detail', 'Summary', and 'Pivot' buttons. At the bottom is a table titled 'Contacts [5 records found]' with columns: ID, Title, Last Name, First Name, Address Type, Street, Street 2, City, State, Zip Code, and Home Phone. The table contains five rows. The second row, with ID 15331, Title Mrs., Last Name Barrow, and First Name Bonnie, is highlighted in blue and has a red arrow labeled '4' pointing to it.

ID	Title	Last Name	First Name	Address Type	Street	Street 2	City	State	Zip Code	Home Phone
15331	Mrs.	Barrow	Bonnie	0						
15330	Mr.	Barrow	Clyde	0						
12692	Ms.	Barrows	Alicia	1	4567 Pillsner Blvd		Old Lyme	CT	06371	
13276		Barrows	Alicia	1	1597 47th Ave W		Old Lyme	CT	06371	
9265		Barrows	Kate	1	1321 1st St E		Mpls	MN	55555	

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Navigate to the **Households** tab to view who is part of the household. You can click the **green household button** at the top of the record card to **view/modify** the household record further. *That button won't be activated until you've created a household for the contact.*

After a contact record has been added to a household this green button will become activated. You can click on it to open and customize the household record further.



File Edit [X] [?] [Print] [Refresh] [Home] [Green Button] [Email]

Mrs. Bonnie Barrow [15331]
<no address> ? <no email address>
<no phone number>

Dashboard | General | **Household** | Gallery | Attribute | Poll | Relation | Contribute | Pledge | Event | Logs | Sales | Admin

Members

Export Print Pivot

Other Household Members

<input checked="" type="checkbox"/>	ID	Last Name	First Name	MI	Birth Date	Total Contribut
<input checked="" type="checkbox"/>	15330	Barrow	Clyde			.00
<input checked="" type="checkbox"/>	1					.00

You can view who's part of the household from a contact's record card, under the Household tab.

How to Manually Create Households, Remove a Person from a Household, and How to Customize the Envelope/Salutation Fields for Mail-Merge

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



Trail Blazer™

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

Related Resources

Article: [Managing Households – Creating, Deleting and Re-Creating](#)

Article: [How to Run a Household Export of Contact \(Voter/Donor\) Data to a .CSV Spreadsheet](#)

Article: [How to Set an Attribute for All Members of a Household En Masse](#)

Article: [How to Print Household Labels](#)

Article: [Creating your Own Custom Relationship Types – 2016 Upgrade](#)

Article: [Automatically Conform Addresses](#)

Article: [Splitting ‘Couples’ into Separate Records En Masse using the Build-In Utility](#)

Article: [How to Split a Single Contact Record into a Duplicate Contact Record for Householding a Couple](#)

Article: [How to Create a Year-End Tax Letter Addressed to Individuals or the Entire Household using Merge Fields – Nonprofit Only](#)

Article: [How to Print Mail-Merge Address Labels](#)

Article: [How to Print Envelopes](#)

Video: [Households – What To Do B4 Households!!](#)

Video: [Households – Delete and Recreate](#)

Video: [Households – Drag n Drop](#)

Video: [Households – Combine More Than 5 Members](#)

Video: [Writer Letter – Edit Letter after Mail Merge](#)

Video: [Year End Tax Letter](#)

Trail Blazer Live Support

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🐦 **Twitter:** <https://twitter.com/trailblazersoft>

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