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

Author: Kristenson, Joel
Last Updated: 2017-05-02

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.
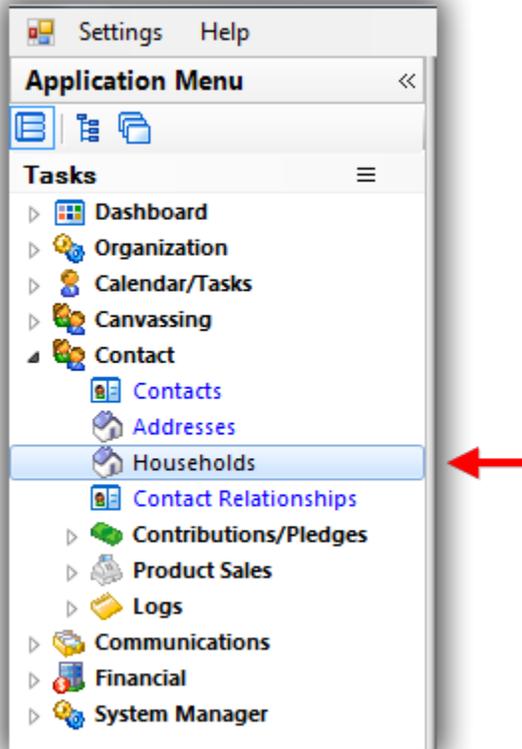
Click **[+ New]** from the search tool strip. *It's not a bad idea to run a* *search query* *by the household name to **verify** that the household **doesn't exist*** *already.*
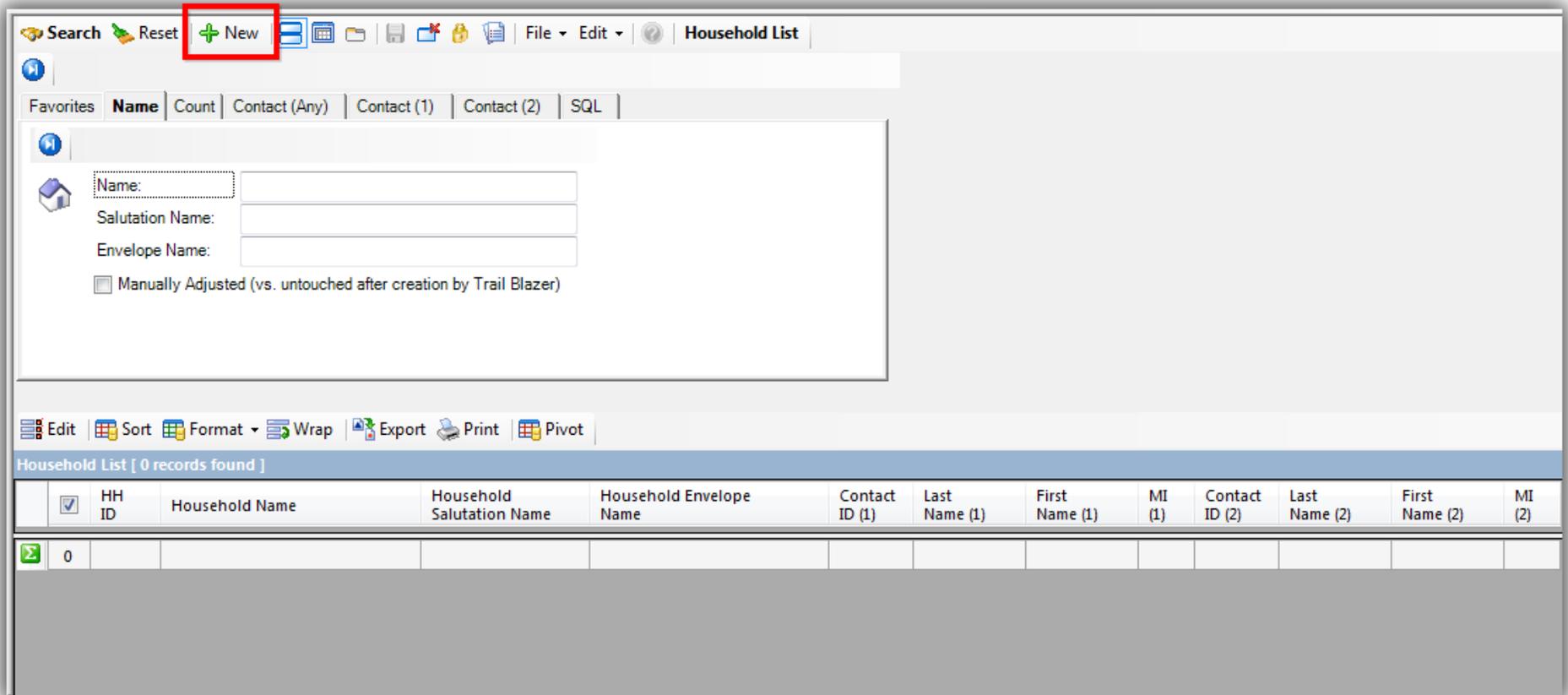
Fill out the fields for **Name**, **Salutation Name**, and **Envelope Name**. Click **[Save]** once you're finished. *My example is below which demonstrates the typical naming convention that's used in Trail Blazer for households.*
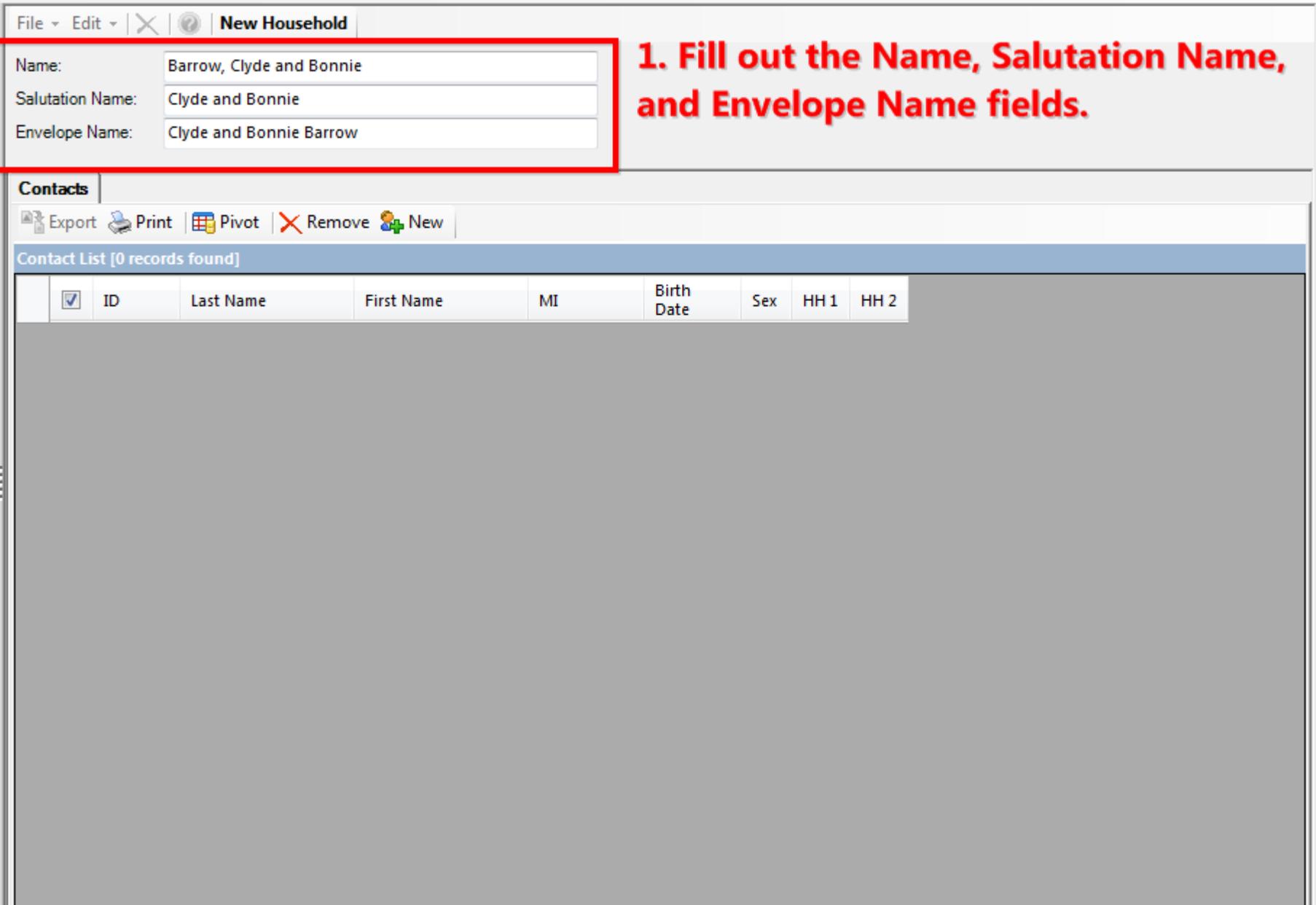
1. Fill out the Name, Salutation Name, and Envelope Name fields.

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

File ▾ Edit ▾ | ✕ | ⊘ | **New Household**

Name: Barrow, Clyde and Bonnie

Salutation Name: Clyde and Bonnie

Envelope Name: Clyde and Bonnie Barrow

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

Contacts

▣ Export 🖶 Print | ⊞ Pivot | ✕ Remove 👥 New

Contact List [0 records found]

☑	ID	Last Name	First Name	MI	Date	Sex	HH 1	HH 2

Add one Contact to the household

7

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.*

Click **[OK]** when prompted.

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

Continue to add all members of the household.

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

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.

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.*

![TrailBlazer - Organize.Leverage.Succeed.]

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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.

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

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

ⓒ **Phone:** 1-866-909-8700

✉ **Email:** support@trailblz.com

f **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.