

Fast•Class File

Client Data System

Volume 65: Working with Spouse Merge Codes

In order for contact and spouse information to populate properly when using Contact and Spouse merge codes, the contact relationship must be defined correctly on the contact **Key Relationship** tab.

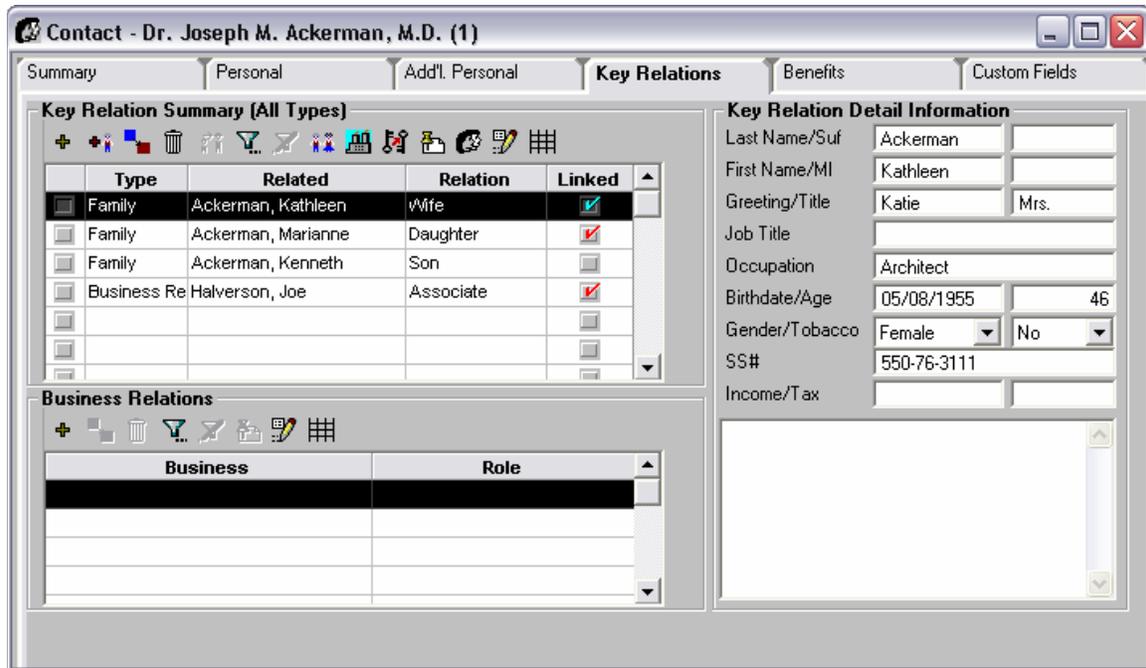


Figure 1: The Key Relations tab of Joseph Ackerman.

When a contact relationship is established, the nature of the relationship is defined in the **Define Relationship** window.



Figure 2: The Define Relationship window.

Contact relationships must be defined as **Husband, Wife, Spouse** or **Domestic Partner** in the **Relationship** drop-down fields for the contact and spouse merge codes to populate properly.

Contact and Spouse Merge Codes:

<<Names>> = Contact and Spouse (Titles included – only the first name of the contact identified as the Head of Household will be included with spouses sharing a last name).

<<Namesjt>> = Joint Contact and Spouse names (first name and titles included)

<<Lnames>> = Contact and Spouse last name with titles.

<<Greetings>> = Preferred greeting of Contact and Spouse (no last name)

Expanded merge codes for Contact and Spouse sharing the same last name:

<<Names>> = **Dr. and Mrs. Joseph Ackerman, M.D.**

<<Namesjt>> = **Dr. Joseph and Mrs. Kathleen Ackerman**

<<Lnames>> = **Dr. and Mrs. Ackerman**

<< Greetings>> = **Joe and Katie**

Expanded merge codes for Contact and Spouse with different last names:

<<Names>> = **Mr. Brad Abernathy and Mrs. Sarah Ridgway**

<<Namesjt>> = **Mr. Brad Abernathy and Mrs. Sarah Ridgway**

<<Lnames>> = **Mr. Abernathy and Mrs. Ridgway**

<< Greetings>> = **Brad and Sarah**

Expanded merge codes for an individual with no spouse information captured in SmartOffice:

<<Names>> = **Mr. Frank Adams**

<<Namesjt>> = **Mr. Frank Adams**

<<Lnames>> = **Mr. Adams**

<< Greetings>> = **Frank**