Fast·Class File

SmartOffice

Volume 45: 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.

When a contact relationship is established, the nature of the relationship is defined in the **Key Relationship Detail** screen.
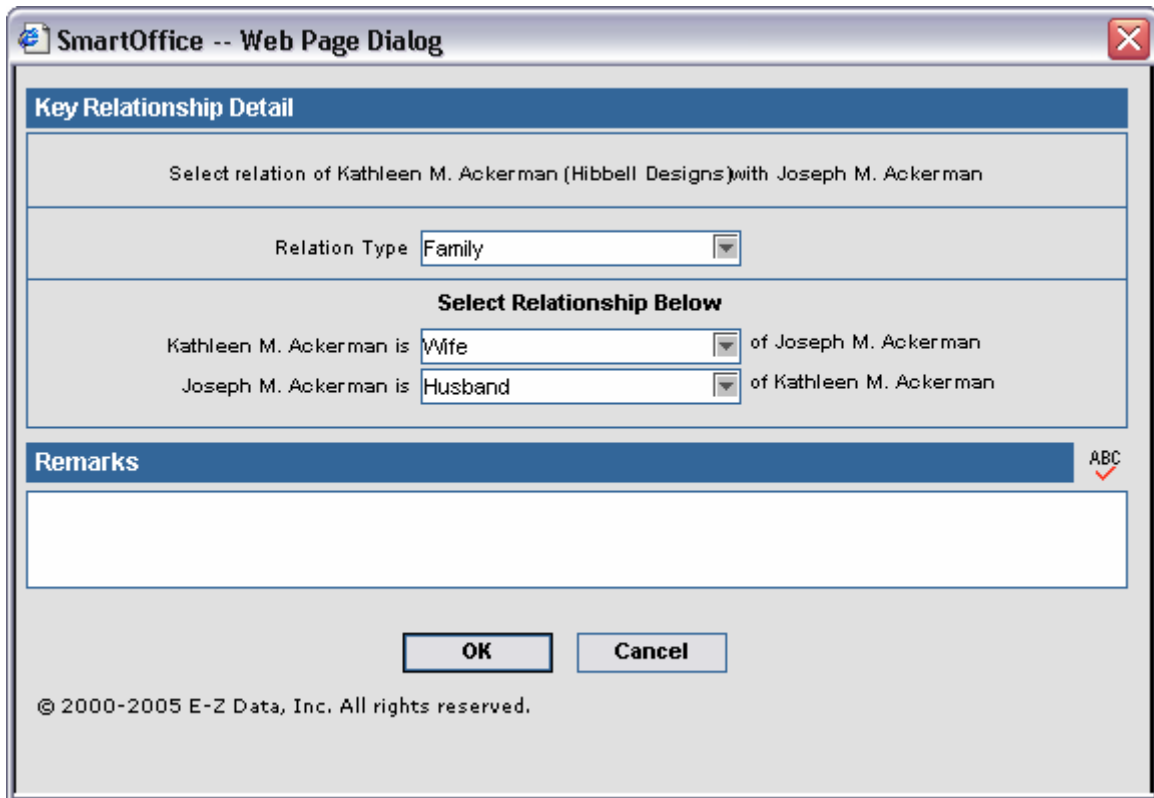

Figure 1: The Key Relationship Detail screen (contact relationship defined as Husband and Wife).

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:

Some examples of Contact and Spouse Merge Codes –

<<FLNames>> = Contact and Spouse First and Last Names

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

<<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)

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

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

<<FLNames>> = **Joseph and Kathleen Ackerman**

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

<<Names>> = **Dr. and Mrs. Joseph Ackerman**

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

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

<<FLNames>> = **Brad Abernathy and Sarah Ridgway**

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

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

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

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

<<FLNames>> = **Frank Adams**

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

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

<< Greetings>> = **Frank**