

# Fast Class File

## Client Data System

### 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.

**Key Relation Summary (Family)**

Type	Related	Relation	Linked
<input type="checkbox"/> Family	Ackerman, Kathleen	Wife	<input checked="" type="checkbox"/>
<input type="checkbox"/> Family	Ackerman, Marianne	Daughter	<input checked="" type="checkbox"/>
<input type="checkbox"/> Family	Ackerman, Kenneth	Son	<input type="checkbox"/>

**Business Relations**

Business	Role
Joseph M. Ackerman, M.D., Inc.	Owner

**Key Relation Detail Information**

Last Name/Suf: Ackerman  
First Name/MI: Kathleen  
Greeting/Title: Katie Mrs.  
Type/Sub:  
Job Title:  
Occupation: Architect  
Birthdate/Age: 05/08/1965 40  
Gender/Tobacco: Female No  
SS#: \*\*\*-\*\*-3111  
Income/Tax:  
Family Income: 120,000.00

**Phone Numbers**

Description	Phone#	Do Not Call
Business	(213)-208-0783	<input type="checkbox"/>
FAX	(213)-208-9771	<input type="checkbox"/>
Residence	(626)-799-2951	<input type="checkbox"/>

**Address**

Description	Street	City	Zip
Residence	488 S. Oakland Avenue	Pasadena	91101
Business	1828 Marengo Street	Los Angeles	90033

Figure 1: The Key Relations tab of Joseph Ackerman.

When a contact relationship is established on the **Key Relations** tab, the nature of the relationship is defined using 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)

#### **Examples:**

#### **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:**

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

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

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

<< Greetings>> = **Frank**