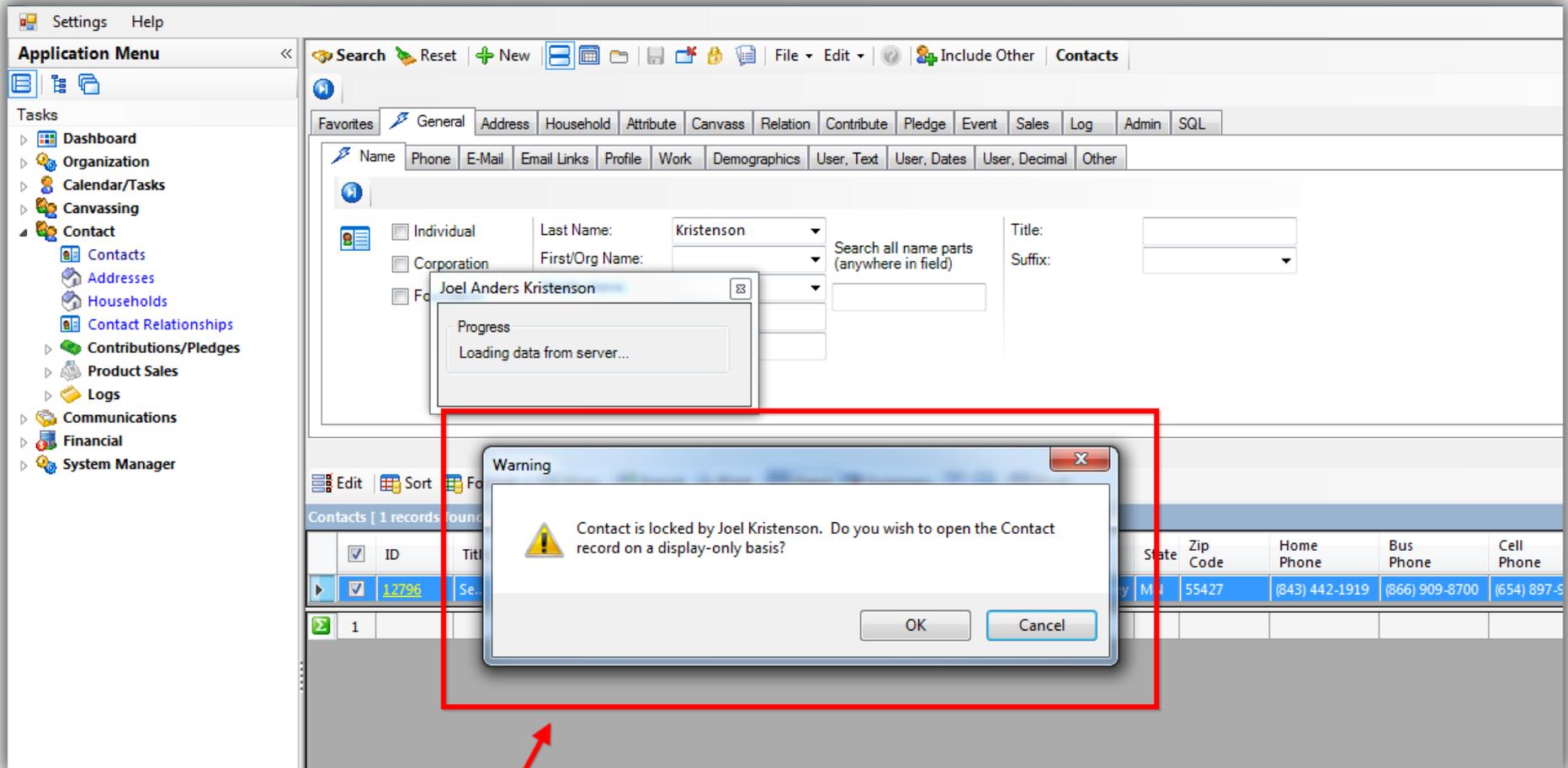


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Last Updated: 2016-11-11

Overview

If you've ever received a message that a **contact's** (*voter/donor*) **record card** is **locked**, like this:

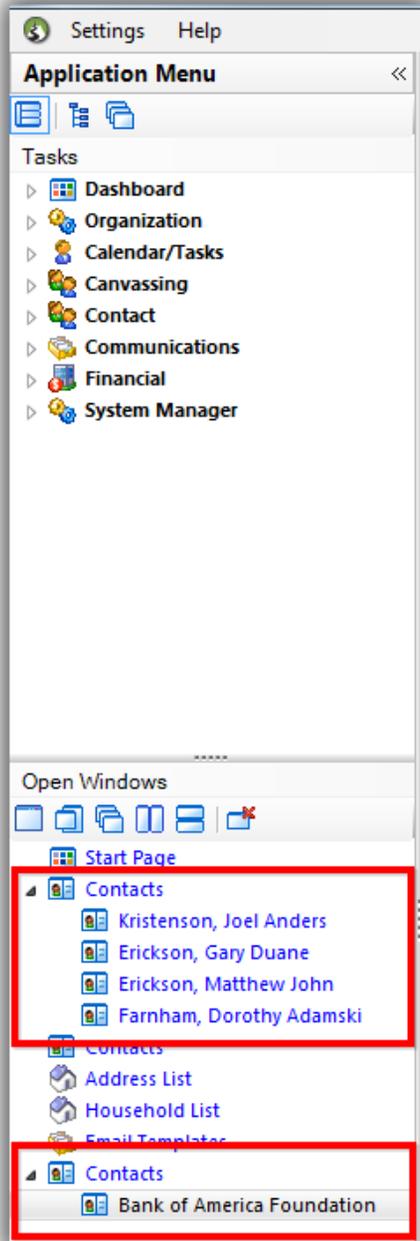


This means another user has the record open and you can only view it on a 'read-only' basis.

It means that another [database user](#) has the record **open**, or left it open. You can still **view** it, but only on a **read-only basis** (*you can't make changes*).

This article shows how to **unlock locked contact** (voter/donor) records as well as **payee** records.

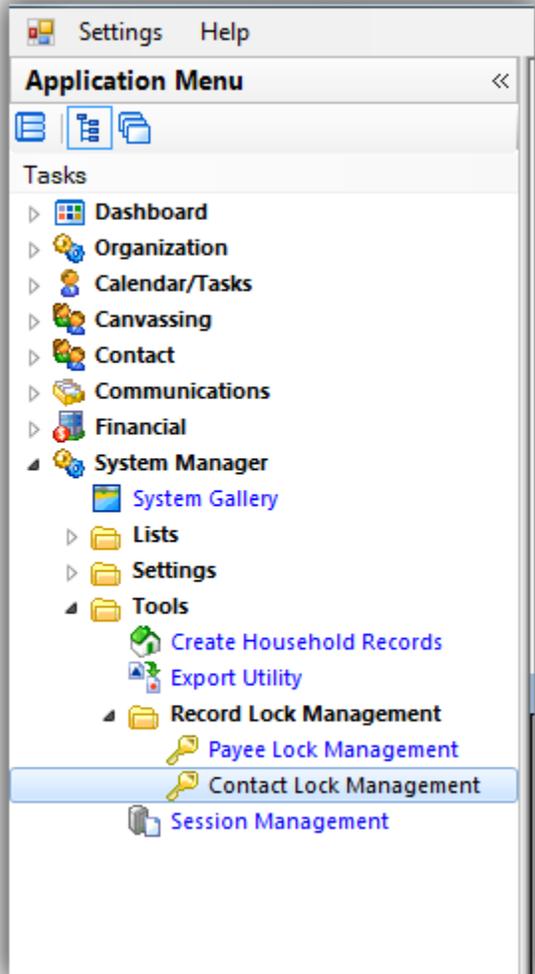
 **Tip:** When you're finished working in a contact's record card, or you're done working for the day, make sure you **close all 'Open Windows'** before closing down the database application. If you don't, it will sometimes leave the record in a 'locked state':



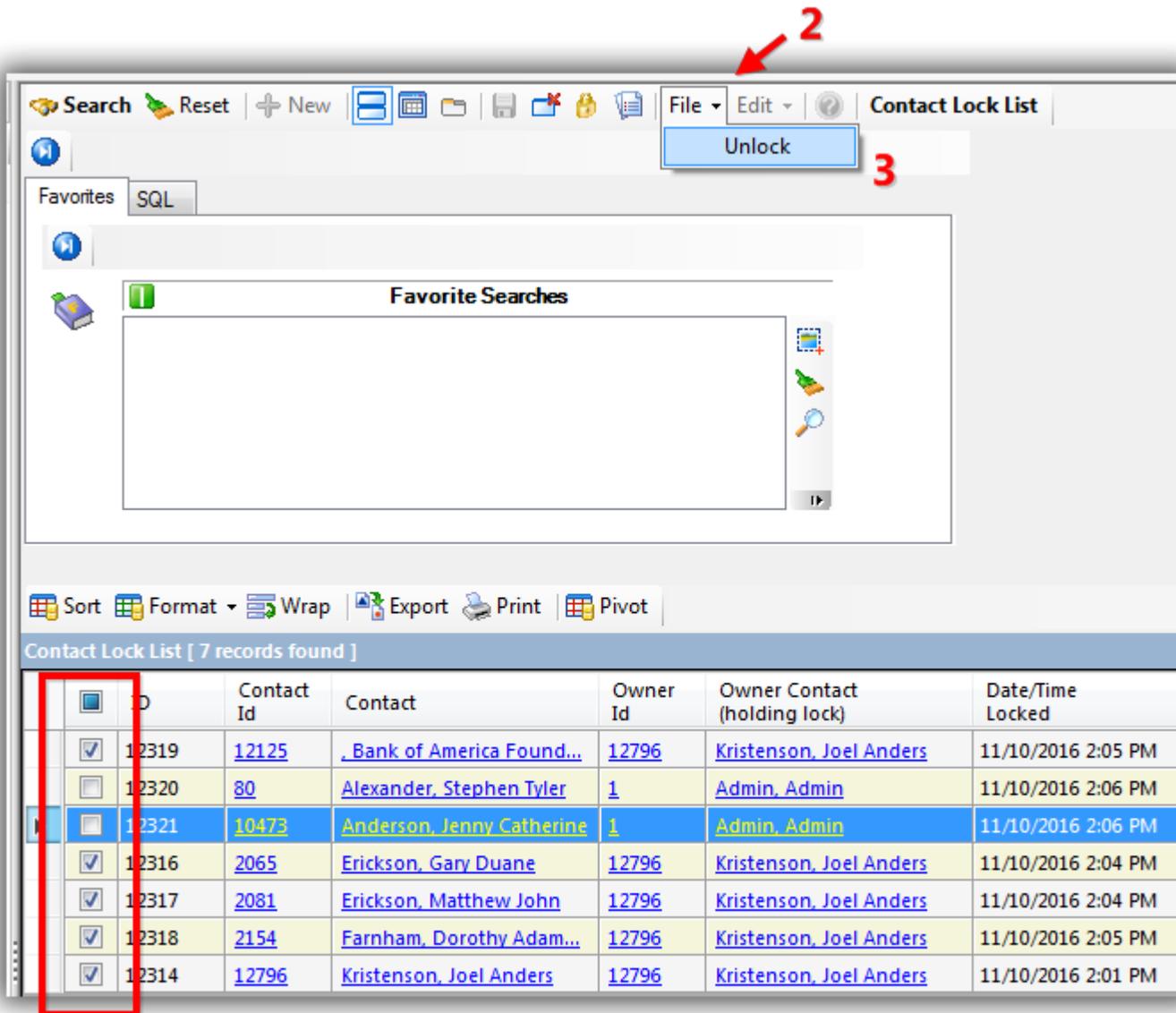
Make sure that when you're done with a contact record or you're done working for the day that you 'close all of your open windows'. If you leave contacts open, and close the program, they can

Steps to Unlock Contact (Voter/Donor) Records

Navigate to the **Contact (Voter/Donor) Lock Management** list under the **Application Menu**. *Requires admin [security clearance](#).*



This list will auto-populate **all** records that are **currently locked** (*opened by another user*). **Check the boxes** in the first column for the ones you **want to unlock**, and then click **File > Unlock**. *In my example there were 7 and I selected 5 of them.*

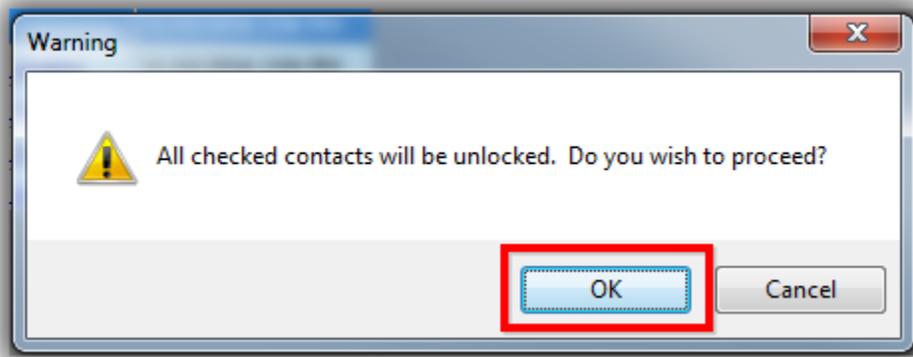


The screenshot shows the TrailBlazer interface with a 'Contact Lock List' window. The window has a menu bar with 'File' and 'Edit' menus. The 'File' menu is open, showing an 'Unlock' button. A red arrow labeled '2' points to the 'File' menu, and a red arrow labeled '3' points to the 'Unlock' button. Below the menu bar is a toolbar with 'Sort', 'Format', 'Wrap', 'Export', 'Print', and 'Pivot' options. The main area displays a table with 7 records. A red box highlights the checkboxes in the first column of the table.

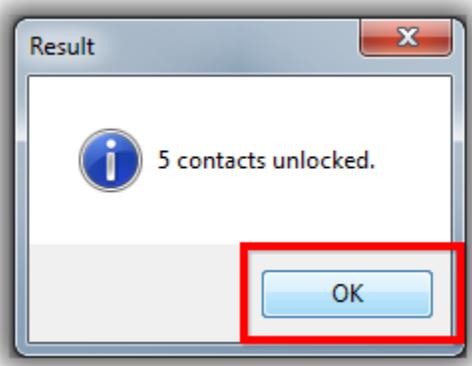
<input type="checkbox"/>	ID	Contact Id	Contact	Owner Id	Owner Contact (holding lock)	Date/Time Locked
<input checked="" type="checkbox"/>	12319	12125	_Bank of America Found...	12796	Kristenson, Joel Anders	11/10/2016 2:05 PM
<input type="checkbox"/>	12320	80	Alexander, Stephen Tyler	1	Admin, Admin	11/10/2016 2:06 PM
<input type="checkbox"/>	12321	10473	Anderson, Jenny Catherine	1	Admin, Admin	11/10/2016 2:06 PM
<input checked="" type="checkbox"/>	12316	2065	Erickson, Gary Duane	12796	Kristenson, Joel Anders	11/10/2016 2:04 PM
<input checked="" type="checkbox"/>	12317	2081	Erickson, Matthew John	12796	Kristenson, Joel Anders	11/10/2016 2:04 PM
<input checked="" type="checkbox"/>	12318	2154	Farnham, Dorothy Adam...	12796	Kristenson, Joel Anders	11/10/2016 2:05 PM
<input checked="" type="checkbox"/>	12314	12796	Kristenson, Joel Anders	12796	Kristenson, Joel Anders	11/10/2016 2:01 PM

1. Check the boxes for the contact's you want to unlock.

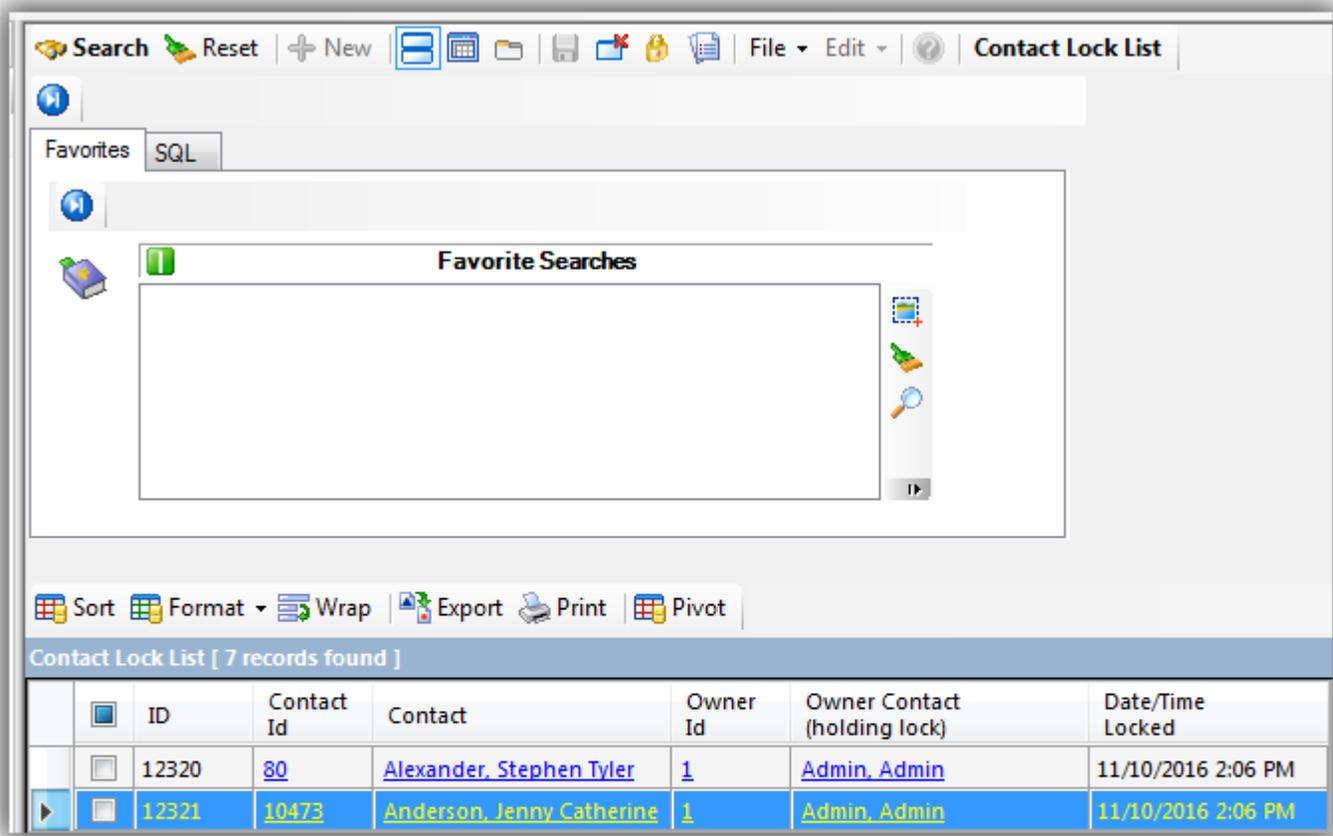
Click **[OK]** to proceed with unlocking the records you selected.



Click **[OK]** to close the popup notification once the process is finished.



The records will disappear from the list if they were successfully unlocked.



Search Reset New [Icons] File Edit Contact Lock List

Favorites SQL

Favorite Searches

Sort Format Wrap Export Print Pivot

Contact Lock List [7 records found]

ID	Contact Id	Contact	Owner Id	Owner Contact (holding lock)	Date/Time Locked
12320	80	Alexander, Stephen Tyler	1	Admin, Admin	11/10/2016 2:06 PM
12321	10473	Anderson, Jenny Catherine	1	Admin, Admin	11/10/2016 2:06 PM

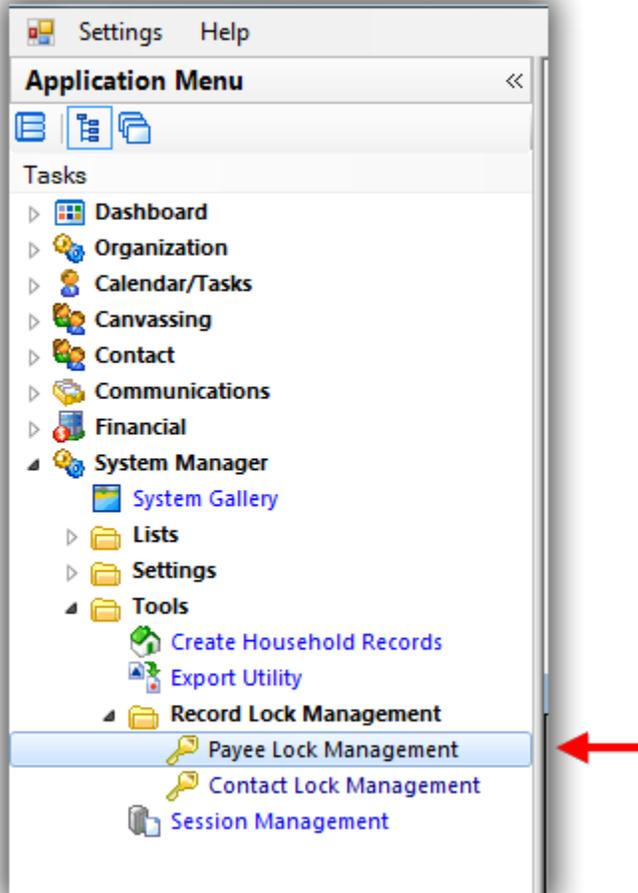


The unlocked records will be removed from the list.

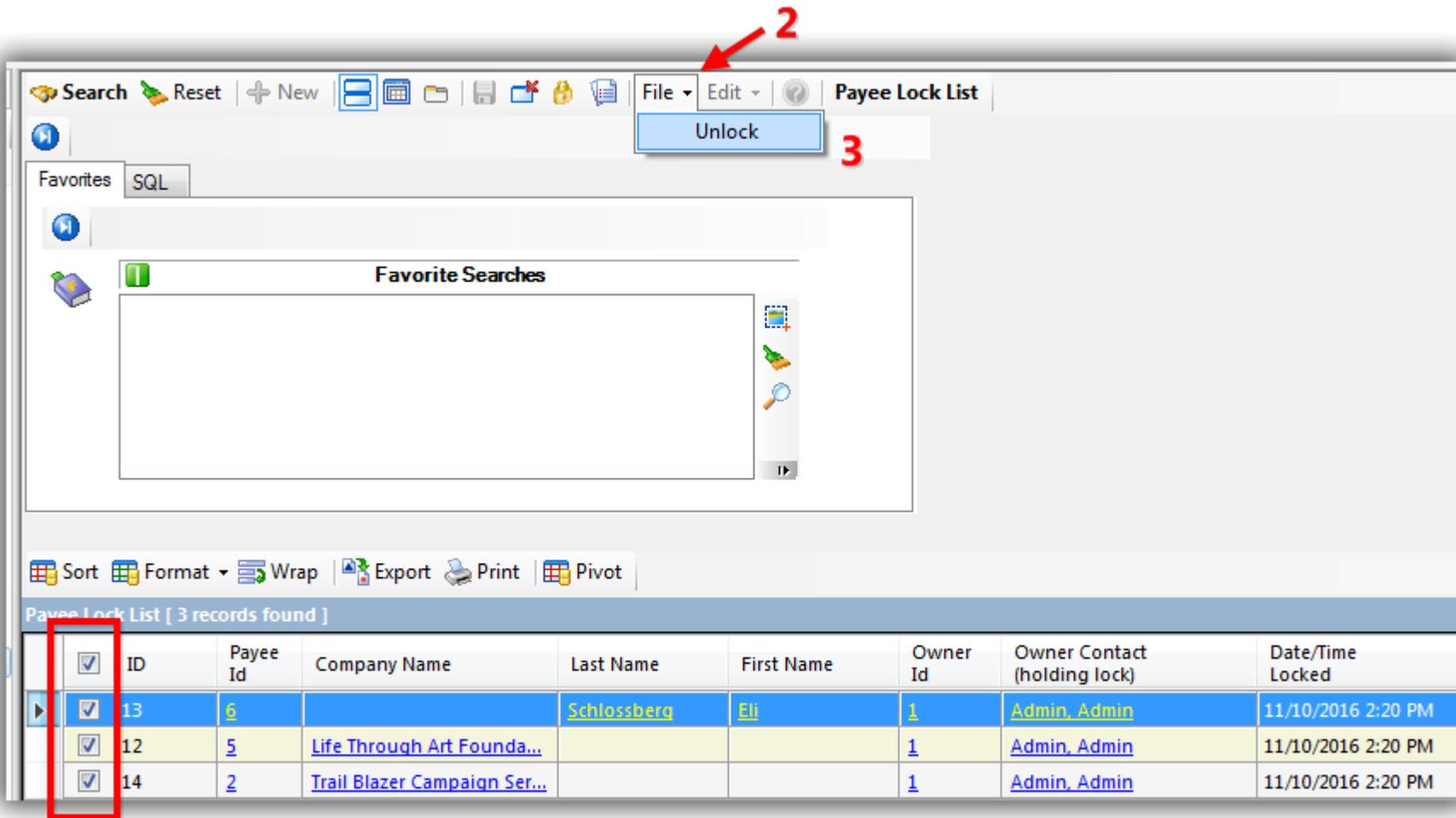
The next section shows how to unlock **payee** records, which is typically just for political customers or the few nonprofits who use our accounting tools.

Steps to Unlock Payee Records (Typically for Political Customers)

Navigate to the **Payee Lock Management** list under the **Application Menu**.



This list will auto-populate all **payee** records that are **currently locked** (opened by a database user). **Select the ones you want to unlock**, and then click **File > Unlock**. *In my example there were 3.*

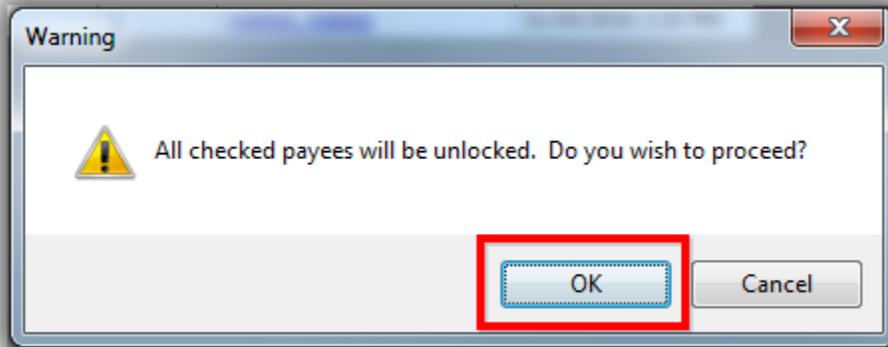


Payee Lock List [3 records found]

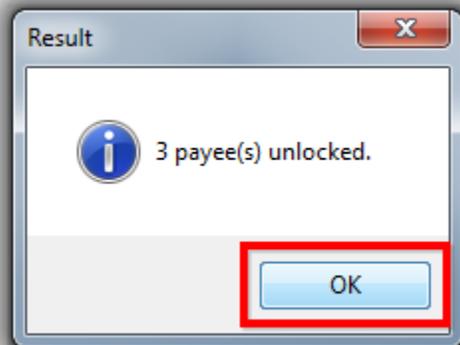
<input checked="" type="checkbox"/>	ID	Payee Id	Company Name	Last Name	First Name	Owner Id	Owner Contact (holding lock)	Date/Time Locked
<input checked="" type="checkbox"/>	13	6		Schlossberg	Eli	1	Admin, Admin	11/10/2016 2:20 PM
<input checked="" type="checkbox"/>	12	5	Life Through Art Founda...			1	Admin, Admin	11/10/2016 2:20 PM
<input checked="" type="checkbox"/>	14	2	Trail Blazer Campaign Ser...			1	Admin, Admin	11/10/2016 2:20 PM

1. Check the boxes for the payees you want to unlock.

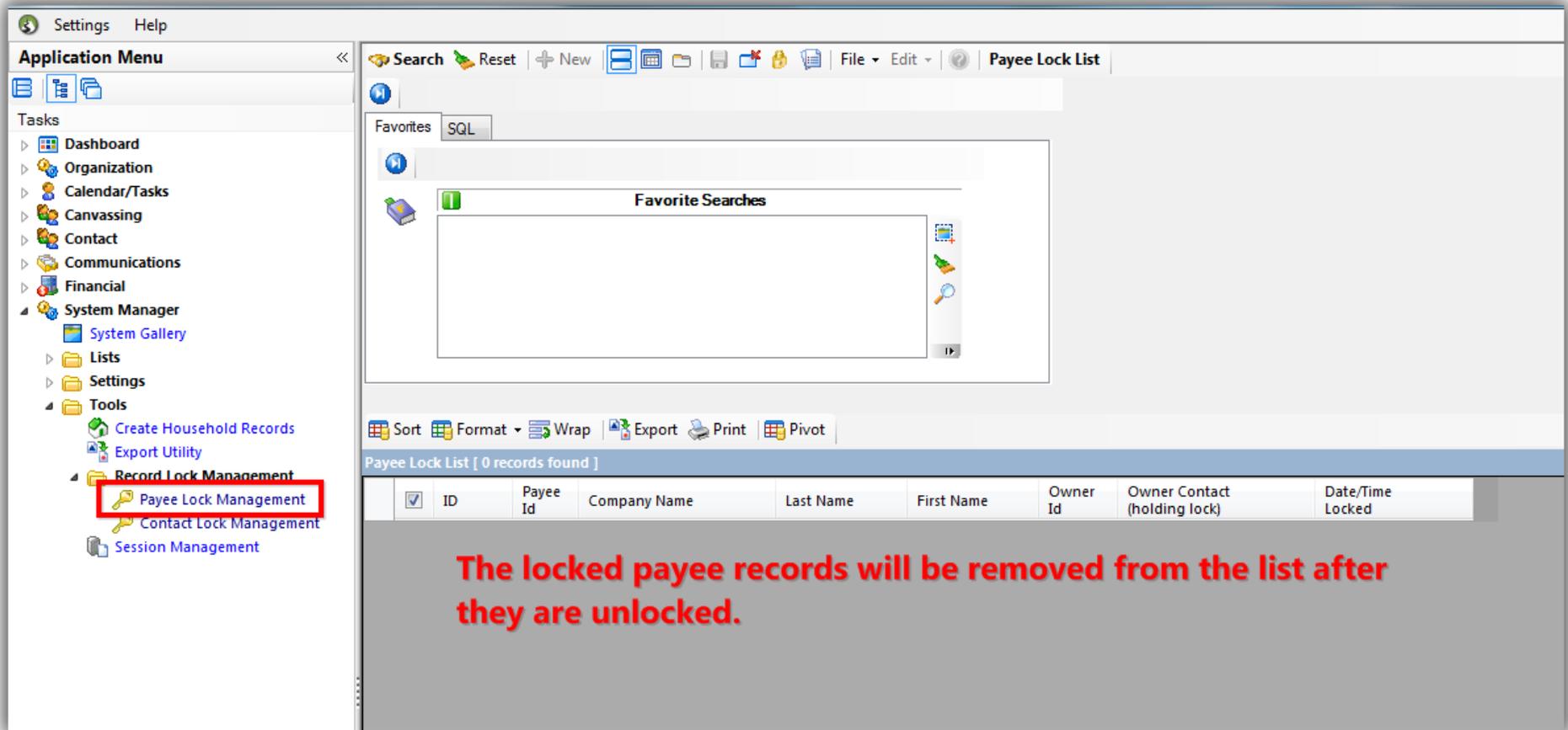
Click [OK] to proceed.



Click **[OK]** again once the process has finished.



The records will disappear from the list if they were successfully unlocked.



The screenshot shows the TrailBlazer application interface. On the left is the 'Application Menu' with a tree view of tasks including 'Record Lock Management', which is highlighted with a red box. The main window displays the 'Payee Lock List' with a toolbar containing 'Search', 'Reset', 'New', and other options. Below the toolbar is a 'Favorite Searches' section. At the bottom, a table header is visible with columns: ID, Payee Id, Company Name, Last Name, First Name, Owner Id, Owner Contact (holding lock), and Date/Time Locked. A red text overlay is positioned over the table area.

The locked payee records will be removed from the list after they are unlocked.

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



Trail Blazer™

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

Related Resources

Article: [During the Day Best Practices](#)

Article: [How to Enter a New Payee](#)

Article: [How to Enter an Invoice for a Payee](#)

Article: [How to Enter a Payment for an Invoice](#)

Video: [Getting Started Installing Trail Blazer](#)

Video: [Enter Invoice and Make Immediate Payment](#)

Video: [Getting Started 101 – Orientation to the screen](#)

Video: [Getting Started 103 – Adding a Contact Record](#)

Video: [Getting Started 106b – Entering Contributions \(POLITICAL ONLY\)](#)

Video: [Getting Started 106a – Entering Contributions \(NON PROFIT ONLY\)](#)

Video: [Getting Started 105 – Queries with an AND condition](#)

Video: [Getting Started 102 Beginning Queries - Political](#)

Video: [Getting Started 102 Beginning Queries - Nonprofit](#)

Video: [Getting Started 107 – Writing Contribution Thank You Letters](#)

Video: [Getting Started 104 Queries with wildcards](#)

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 **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.*