

Author: Kristenson, Joel Last Updated: 2017-01-26

#### **Overview**

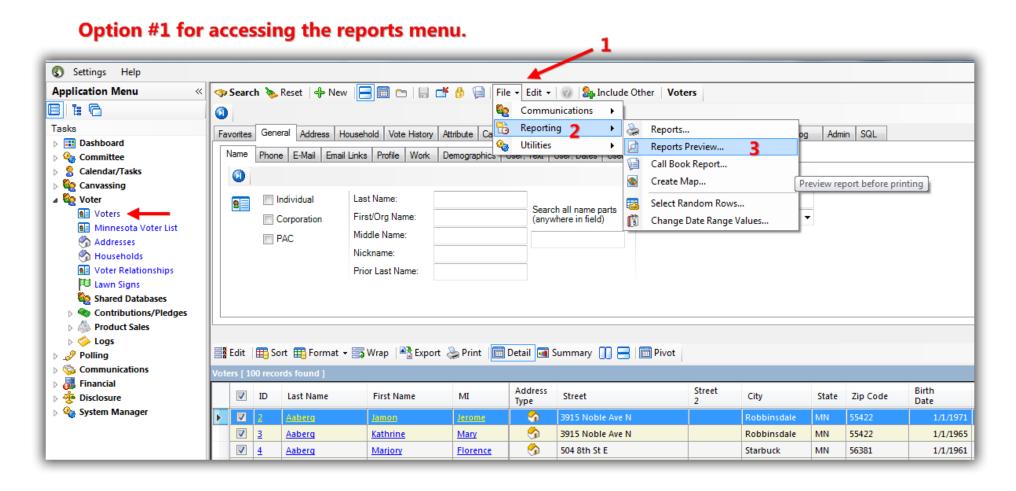
This documents' purpose is to provide a way of deciding which build-in **report** will best suit your needs. There are a variety of **pre-programmed reports** in **Trail Blazer** that serve different purposes (i.e. walk lists, fundraising reports, call book reports, etc.).

This kb also includes brief details about what each report provides along with screenshots of the **configuration steps**, and *examples* of the **end** results.

There are **two ways** to access the built-in reports, these are shown in screenshots below:

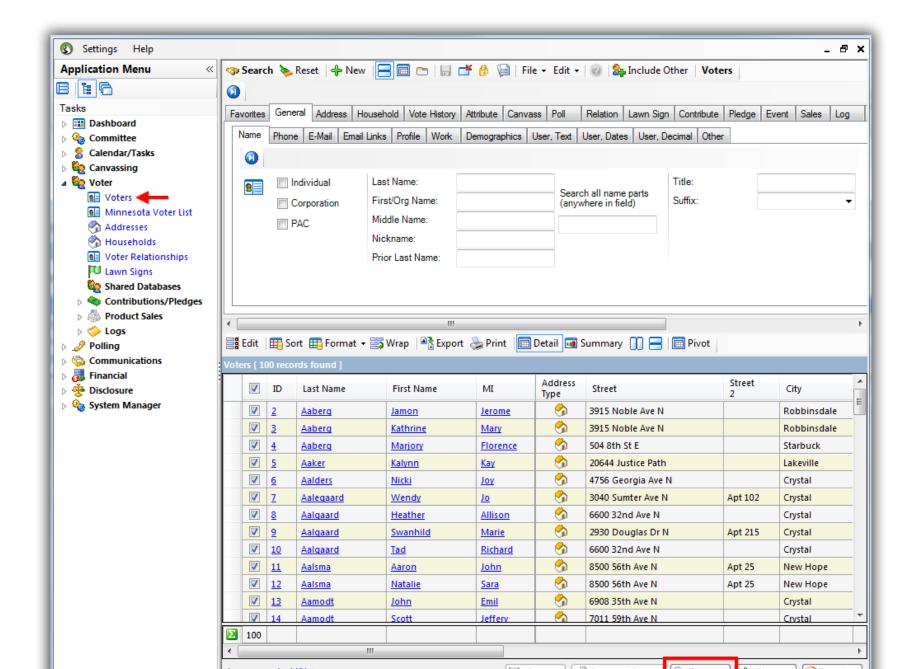
Option No1 – File > Reporting > Reports Preview...





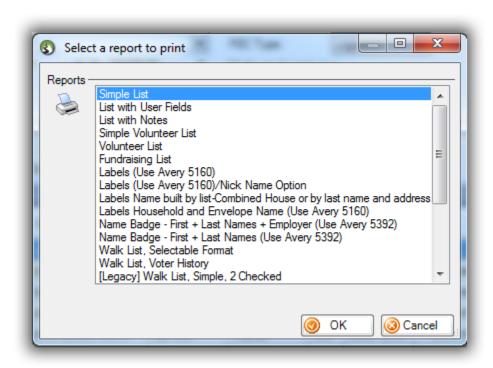
Option No2 - Click the [Reports] button in the lower-right of the Donor/Voter (Contacts) list







Both options will bring up this menu:



Important: If you want to see a print preview of the report prior to print you'll <u>need</u> to use option #1 (via the File Menu > Print Preview).

Tip: Use the Ctrl+F hot key to jump to different sections of this article (example: "#1", "#2" or "Related Resources".



#### **Outline**

- **#1** Simple List
- #2 List with User Fields
- **#3** List with Notes
- **#4** Simple Volunteer List
- **#5** Volunteer List
- #6 Fundraising List
- **#7** Labels (Use Avery 5160)
- #8 Labels (Use Avery 5160)/Nick Name Option
- #9 Labels Name built list-Combined House or by last name and address (Use Avery 5160)
- **#10** Labels Household and Envelope Name (Use Avery 5160)
- #11 Name Badge First + Last Names + Employer (Use Avery 5392)
- #12 Name Badge First + Last Names (Use Avery 5392)
- **#13** Walk List, Selectable Format
- **#14** Walk List, Voter History
- **#15** Related Resources

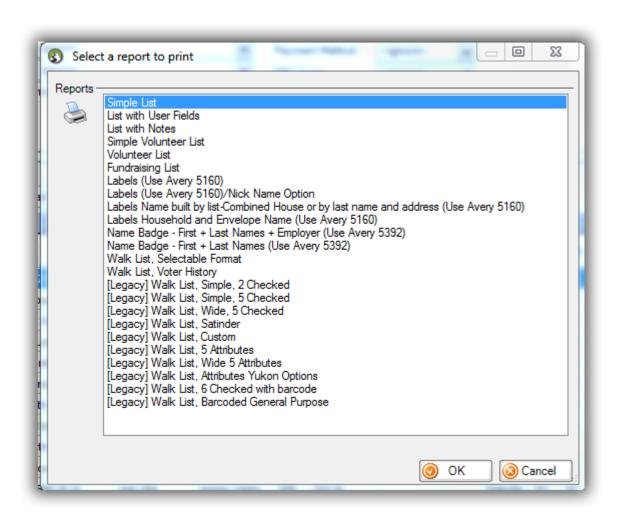


### #1 – Simple List

The **Simple List** option will **sort** by **street address**. First by **house numbers** so all the same house numbers on different streets sort the same.

Img 1 of 2 – Selecting the Simple List option

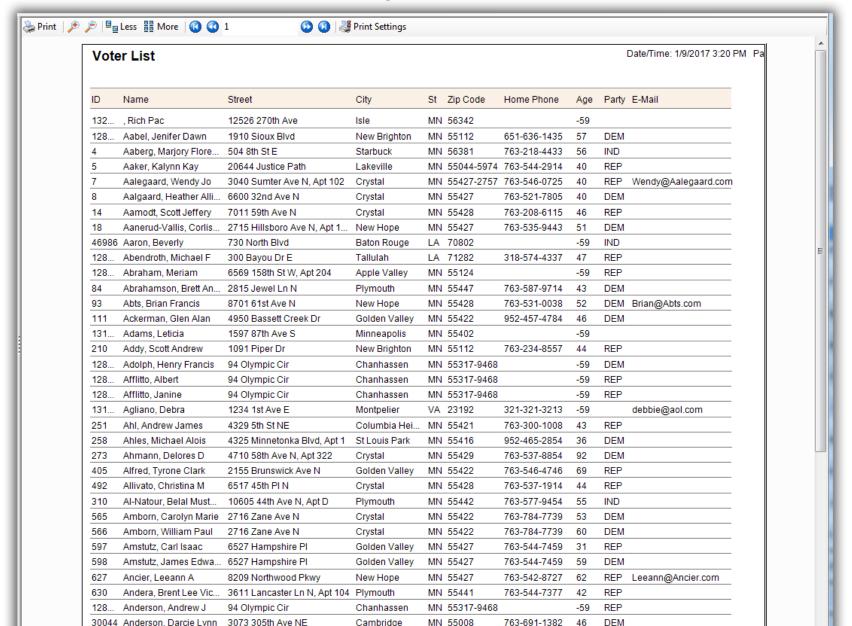




Img 2 of 2 - Example Print Preview



#### **Simple List**



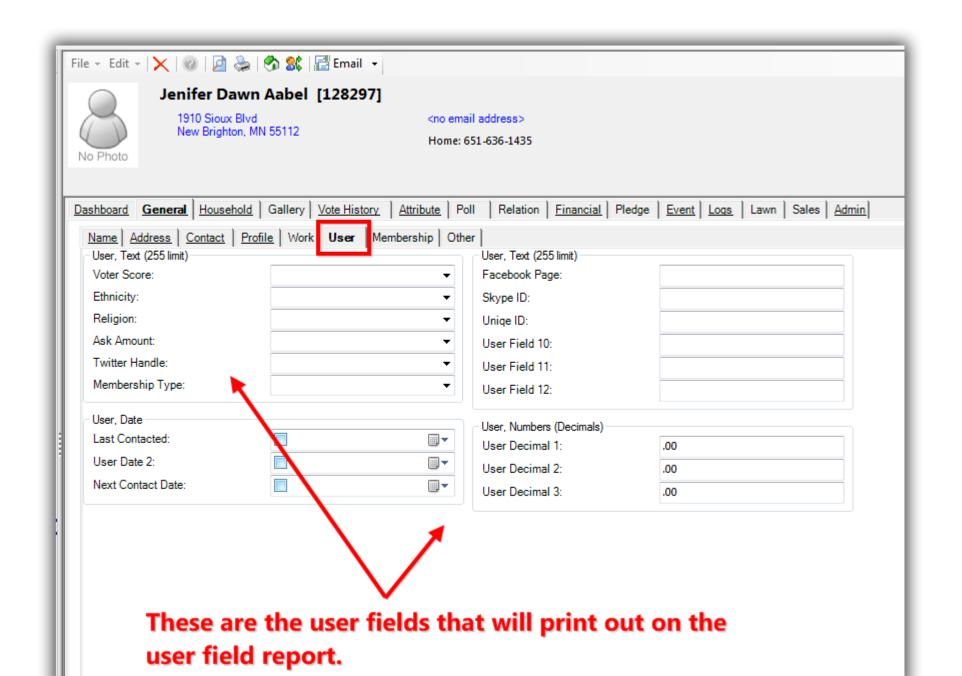


### #2 – List with User Fields

If you utilize <u>user fields</u> in your database to track **custom data points** (e.g. graduation year), this is a good report for you. It will print a small amount of information on the contacts in the list such as their name, address, and contact info, along with the user fields you select to print out.

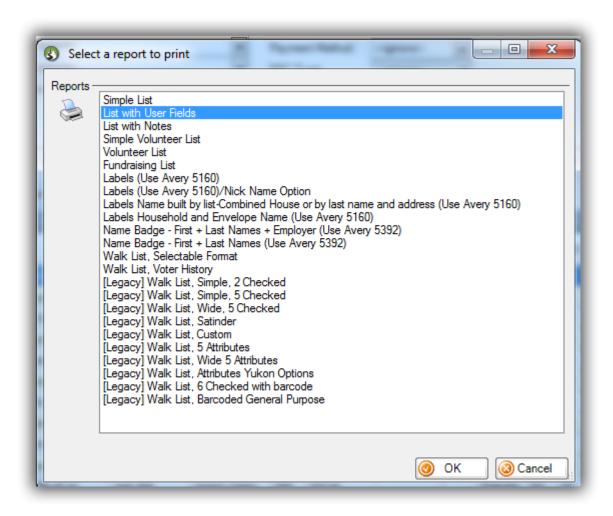
Img 1 of 4 – Example Contact Record that has User Fields Present







Img 2 of 4 – Selecting the List with User Fields Report

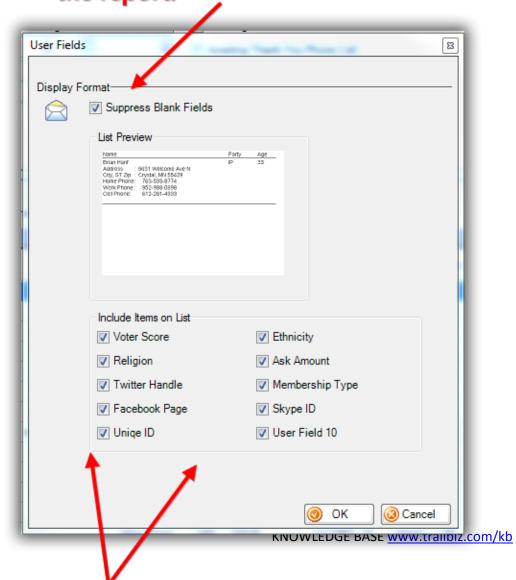




Img 3 of 4 – Configuring the Print Settings



\*Optionally supress blank user fields from the report.

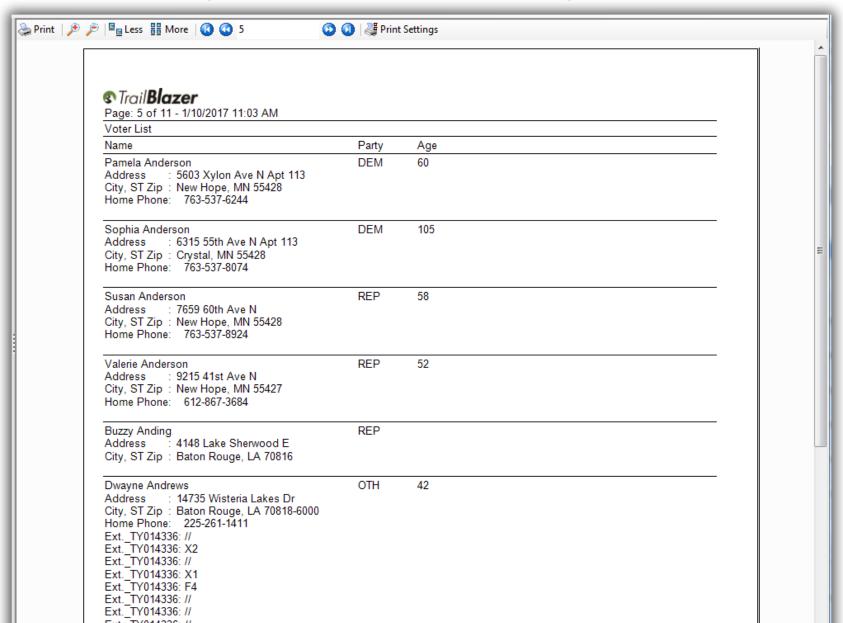




Img 4 of 4 – Example Print Preview of the List with User Fields Report



#### **Example Print Preview of the User Field Report**

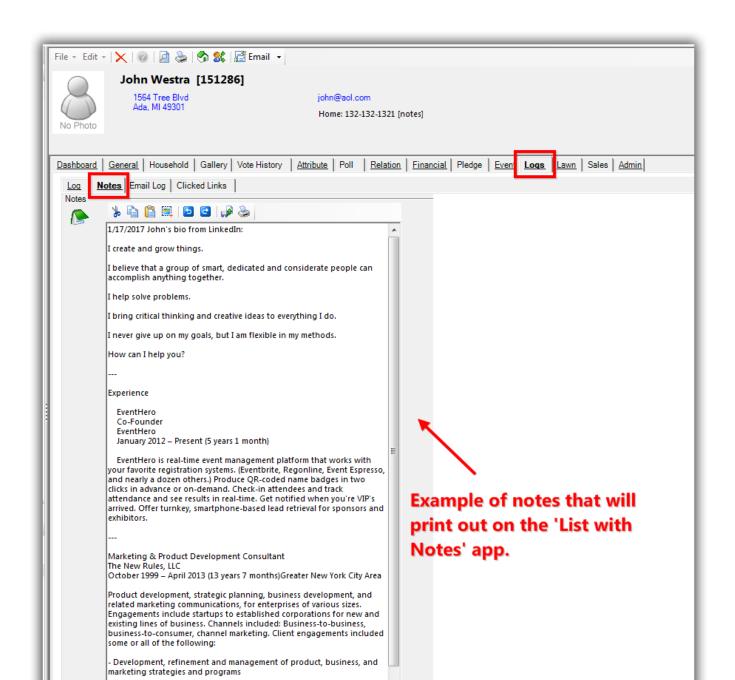




### #3 – List with Notes

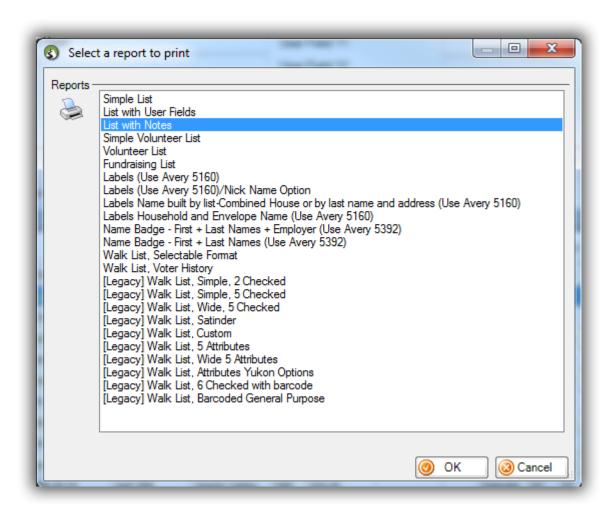
The **List with Notes** report will print out whatever text is in the 'Notes' tab of a contact record card:





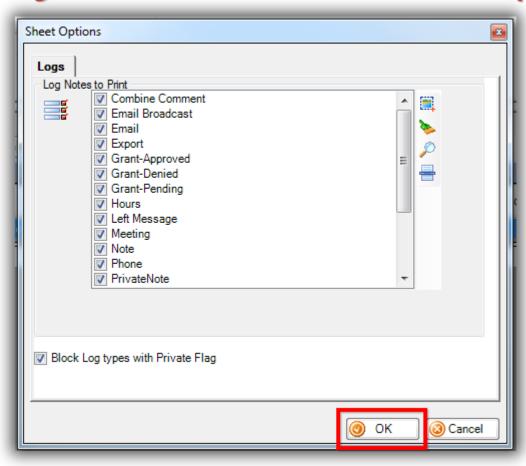


Img 1 of 3 – Selecting the List with Notes Report



Img 2 of 3 – Configuring your Options

### Configuration screen for the List with Notes report.

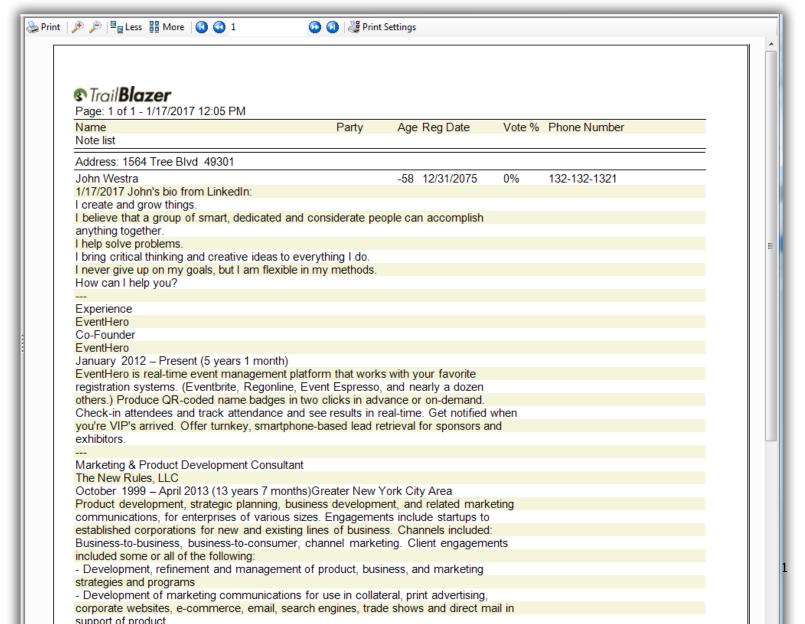




Img 3 of 3 – Example List with Notes Report



#### Example print preview of the 'List with Notes' report for a single contact record.



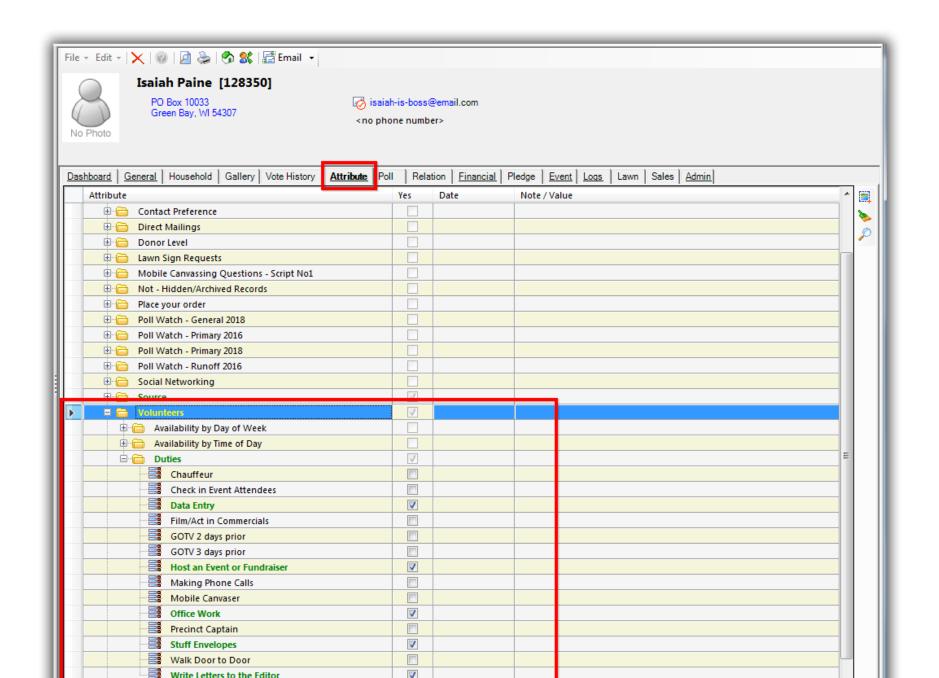


### #4 – Simple Volunteer List

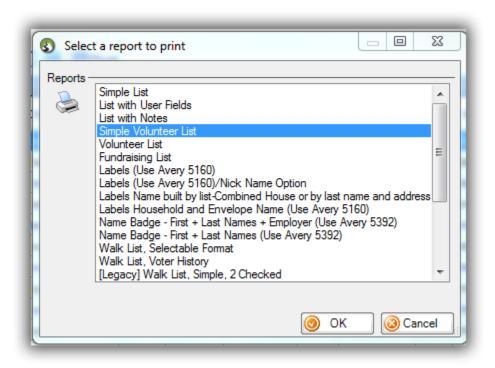
This report will print out <u>attributes</u> under the **volunteer** folder (\*requires you have a volunteer folder created).

Img 1 of 3 – Example of Where the Report Pulls Attributes from





Img 2 of 3 – Selecting the Simple Volunteer List Report



Img 3 of 3 – Example Print Preview of the Simple Volunteer List



### **Example print preview of the Simple Volunteer List.**

Voter with Volunteer List  Date/Time: 1/18/2017 9:32 AM F									
ID	Name	Street	City	St	Zip Code	Home Phone	Age	Party	E-Mail
2490	Baumgardner, Christine	3927 West Broadway, Apt 1	Robbinsdale	MN	55422	763-537-1234	46	REP	Christine@Baumgardner.cor
Makin	g Phone Calls:: Walk Doo	or to Door :: Host an event or fu	ndraiser :: Write a	letter	to the editor	:: ><			
8116	Crosbie, Charles James	13233 Revere Ln N	Champlin	MN	55316	763-537-4234	40	DEM	Charles@Crosbie.com
Makin	g Phone Calls:: Walk Doo	or to Door :: ><							
8117	Crosbie, Marcia	13233 Revere Ln N	Champlin	MN	55316	763-537-4234	37	DEM	Marcia@Crosbie.com
Makin	g Phone Calls:: Walk Doo	or to Door :: ><							
9587	Dooley, Tony C	4656 West Broadway	Robbinsdale	MN	55422	612-537-7234	43	REP	Tony@Dooley.com
Makin	g Phone Calls:: Walk Doo	orto Door :: ><							
14934	Haberle, Dawn Marie	7351 40th Ave N	New Hope	MN	55427	763-537-4234	49	DEM	Dawn@Haberle.com
Makin	g Phone Calls:: Walk Doo	or to Door :: Stuff Envelopes :: >	·<						
20511	Judovsky, Ginger Ton	2526 Brookdale Ln N	Brooklyn Park	MN	55444	763-537-0234	43	DEM	Ginger@Judovsky.com
Makin	g Phone Calls:: Walk Doo	or to Door :: Stuff Envelopes :: >	≺						
20512	Judovsky, Steven Arn	2526 Brookdale Ln N	Brooklyn Park	MN	55444	763-537-0234	47	DEM	Steven@Judovsky.com
Makin	g Phone Calls:: Walk Doo	or to Door :: I Want A Yard Sign	:: ><						
25801	Magstadt, Donald C	5748 Elmhurst Ave N	Crystal	MN	55428	763-537-5234	83	REP	Donald@Magstadt.com
Makin	g Phone Calls:: Walk Doo	or to Door :: I Want A Yard Sign	:: ><						
28969	Moser, Amy Lynn	5307 Edgewood Ave N	Crystal	MN	55428	763-537-9234	48	DEM	Amy@Moser.com
Makin	g Phone Calls:: Walk Doo	or to Door :: I Want A Yard Sign	:: Volunteering in	a Ca	mpaign Offic	ce :: ><			
28986	Moser, Todd Lester	5307 Edgewood Ave N	Crystal	MN	55428	763-537-9234	53	DEM	Todd@Moser.com
Makin	g Phone Calls:: Walk Doo	or to Door :: Volunteering in a Ca	ampaign Office ::	><					
32727	Peterson, Bette Rae	100 Clydesdale Trl, Apt 325	Hamel	MN	55340	763-557-7234	94	DEM	Bette@Peterson.com
Makin	g Phone Calls:: Walk Doo	or to Door :: Volunteering in a Ca	ampaign Office ::						
32817	Peterson, Hewitt	100 Clydesdale Trl, Apt 325	Hamel	MN	55340	763-557-7234	95	REP	Hewitt@Peterson.com
Makin	g Phone Calls:: Walk Doo	or to Door :: Volunteering in a Ca	ampaign Office ::						
	Brittingham, Charles	602 Constitution Ave	Washington	DC	20002		-58	DEM	Charles@Brittingham.com
Stuff E	Envelopes :: ><								
128	Paine, Isaiah	PO Box 10033	Green Bay	WI	54307		-58	REP	Isaiah@Paine.com

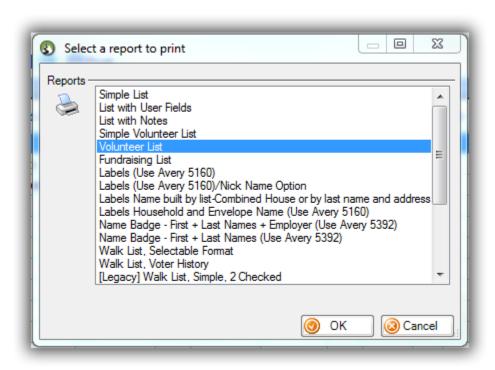


### #5 - Volunteer List

The Volunteer List report is essentially the same as the Simple Volunteer List with minor changes to the UI (user interface) on the final printout.

Img 1 of 2 – Selecting the Volunteer List Report

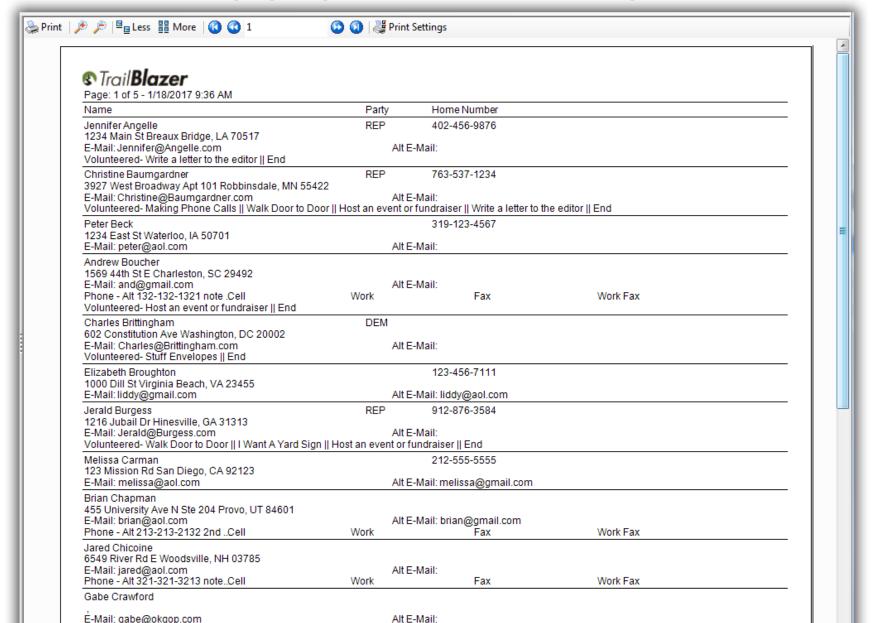




Img 2 of 2 – Example Print Preview of the Volunteer List



#### **Example print preview of the Volunteer List report.**



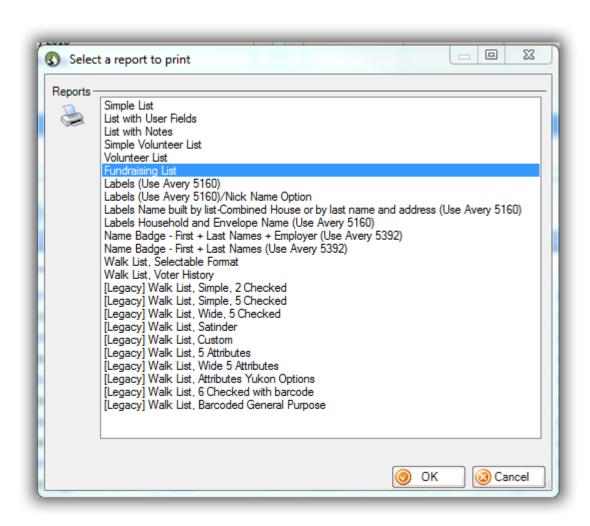


### #6 - Fundraising List

The Fundraising List report is very useful for providing a quick snapshot of each donors giving history in the list you <u>queried</u> for. It will provide the date and time of each donation.

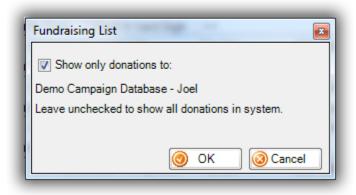
Img 1 of 3 – Selecting the Fundraising List Report





Img 2 of 3 – Configuring the Report

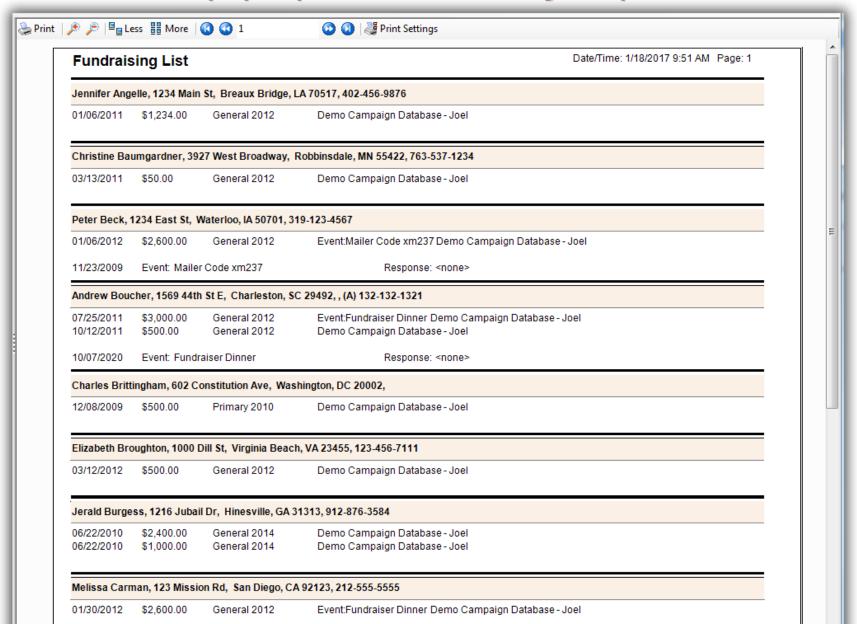
# If you have more than one committee record you can select them here.



Img 3 of 3 – Example Print Preview of the Fundraising List Report



#### **Example print preview of the Fundraising List report.**





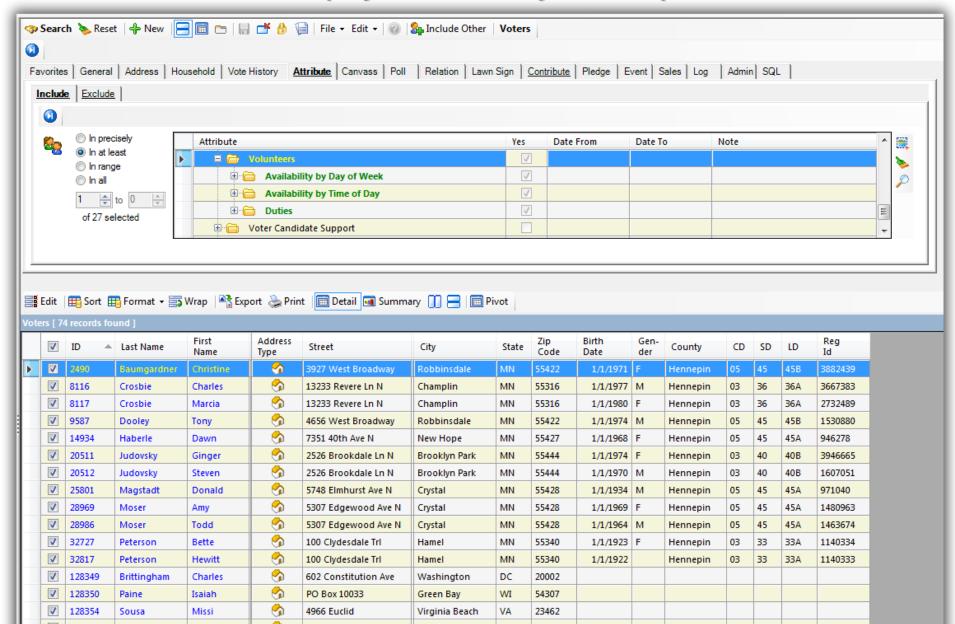
### #7 - Labels (Use Avery 5160)

This "Report" isn't really a report but is how you print mailing labels using the Avery 5160 mailing labels. If you don't have this type of label paper you'll need to <u>export</u> the list and run the mail-merge through something like <u>Microsoft Word</u>. This option will print the contact's **first name**, **last name**, and their **home address**.

Img 1 of 3 – Search for the List of Contacts to Print Labels for

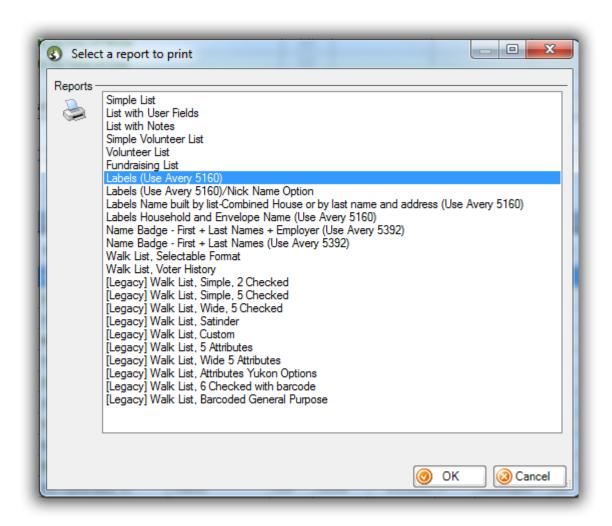


#### Build and run a search query for the contacts you want to print labels for.





Img 2 of 3 – Selecting the Labels (Use Avery 5160) Report





Img 3 of 3 – Example Print Preview of the Labels (Use Avery 5160) Report



#### **Example print preview of the Labels (Use Avery 5160) Report.**

🍃 Print   🅕 🔑   🖳 Less 🔡 More   🕡 🕡 1	🕡 🚺 🎏 Print Settings		
Christine Baumgardner 3927 West Broadway Apt 101 Robbinsdale, MN 55422	Charles Crosbie 13233 Revere Ln N Champlin, MN 55316	Marcia Crosbie 13233 Revere Ln N Champlin, MN 55316	
Tony Dooley	Dawn Haberle	Ginger Judovsky	
4656 West Broadway	7351 40th Ave N	2526 Brookdale Ln N	
Robbinsdale, MN 55422	New Hope, MN 55427	Brooklyn Park, MN 55444	
Steven Judovsky	Donald Magstadt	Amy Moser	
2526 Brookdale Ln N	5748 Elmhurst Ave N	5307 Edgewood Ave N	
Brooklyn Park, MN 55444	Crystal, MN 55428	Crystal, MN 55428	
Todd Moser 5307 Edgewood Ave N Crystal, MN 55428	Bette Peterson 100 Clydesdale Trl Apt 325 Hamel, MN 55340	Hewitt Peterson 100 Clydesdale Trl Apt 325 Hamel, MN 55340	
Charles Brittingham	Isaiah Paine	Missi Sousa	
602 Constitution Ave	PO Box 10033	4966 Euclid	
Washington, DC 20002	Green Bay, WI 54307	Virginia Beach, VA 23462	
Alicia Huffaker	Russ Duerstine	Blair Palmer	
123 Main St E	123 1st St E	123 Main St E	
Las Vegas, NV 11111	Mpls, MN 55555	Langly, WA 98260	
Caroline Schaeffer	Mary Springer	Kathryn Wittman	

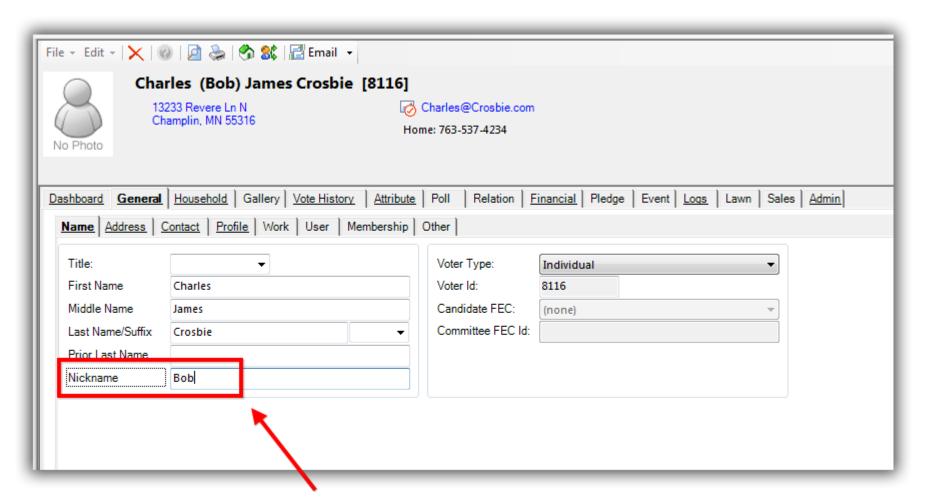


#### #8 - Labels (Use Avery 5160)/Nick Name Option

This report is essentially the same as the regular labels report but if there is a nickname present it will print out instead of the first name.

Img 1 of 3 – Example Contact Record with a Nickname which Prints Out on this Label Option

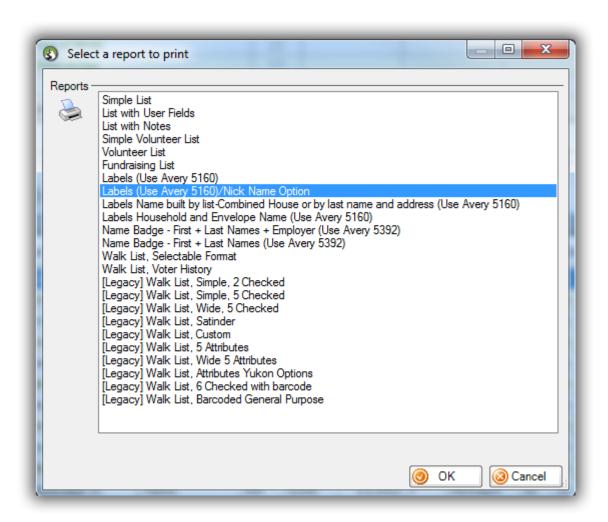




On the Labels (Use Avery 5160)/Nick Name Option report this merge field will take the place of the first name if it exists.



Img 2 of 3 – Selecting the Labels (Use Avery 5160)/Nick Name Option Report





Img 3 of 3 – Example Print Preview



#### **Example print preview of the Labels (Use Avery 5160)/Nick Name Option report.**

🌦 Print   🅕 🔎   º 📴 Less 🔠 More   🕡 🥥 1	💽 🕡   👺 Print Settings		
	Records that have a nickname present will		
Chrissy Baumgardner 3927 West Broadway Apt 101 Robbinsdale, MN 55422	Bob Grosbie 19293 Revere Ln N Champlin, MN 55316	nstead of the first name.  Marcia Crosbie 13233 Revere Ln N Champlin, MN 55316	
Tony Dooley 4656 West Broadway Robbinsdale, MN 55422	Dawn Haberle 7351 40th Ave N New Hope, MN 55427	Ginger Judovsky 2526 Brookdale Ln N Brooklyn Park, MN 55444	
Steven Judovsky 2526 Brookdale Ln N Brooklyn Park, MN 55444	Donald Magstadt 5748 Elmhurst Ave N Crystal, MN 55428	Amy Moser 5307 Edgewood Ave N Crystal, MN 55428	
Todd Moser 5307 Edgewood Ave N Crystal, MN 55428	Bette Peterson 100 Clydesdale Trl Apt 325 Hamel, MN 55340	Hewitt Peterson 100 Clydesdale Trl Apt 325 Hamel, MN 55340	
Charles Brittingham 602 Constitution Ave Washington, DC 20002	Isaiah Paine PO Box 10033 Green Bay, WI 54307	Missi Sousa 4966 Euclid Virginia Beach, VA 23462	
Alicia Huffaker 123 Main St E Las Vegas, NV 11111	Russ Duerstine 123 1st St E Mpls, MN 55555	Blair Palmer 123 Main St E Langly, WA 98260	
Caroline Schaeffer	Mary Springer	Kathryn Wittman	

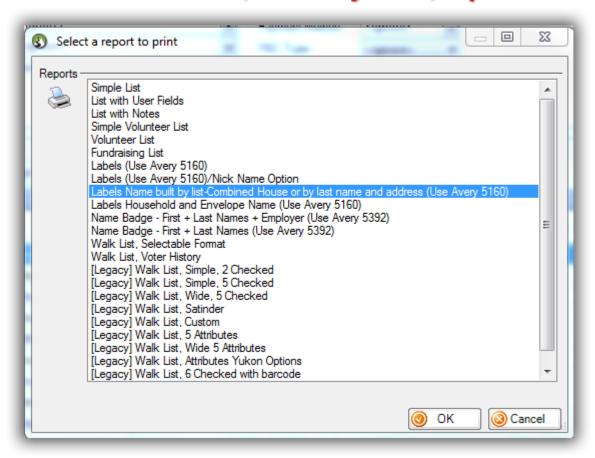
# #9 – Labels Name built list-Combined House or by last name and address (Use Avery 5160)

This "report" will print labels for the list you queried for and provides options to address the family or the heads of household.

Img 1 of 3 – Selecting the "Report"

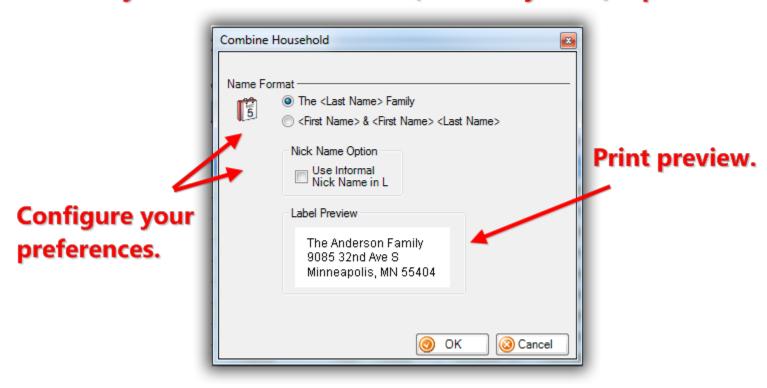


# Selecting the Labels Name built by list-Combined House or by last name and address (Use Avery 5160) report.





# Configuring the 'Labels Name built list-Combined House or by last name and address (Use Avery 5160) report.



Img 3 of 3 – Example Print Preview



### Example print preview of the 'Labels Name built list-Combined House or by last name and address (Use Avery 5160) report.

Print   🎤 🔎   º □ Less 🛗 More   🕡 🕡 1	🚺 🚺 🎏 Print Settings	○ ①   ﷺ Print Settings		
The Baumgardner Family 3927 West Broadway Apt 101 Robbinsdale, MN 55422	The Crosbie Family 13233 Revere Ln N Champlin, MN 55316	The Dooley Family 4656 West Broadway Robbinsdale, MN 55422	Â	
The Haberle Family 7351 40th Ave N New Hope, MN 55427	The Judovsky Family 2526 Brookdale Ln N Brooklyn Park, MN 55444	The Magstadt Family 5748 Elmhurst Ave N Crystal, MN 55428	Ш	
The Moser Family 5307 Edgewood Ave N Crystal, MN 55428	The Peterson Family 100 Clydesdale Trl Apt 325 Hamel, MN 55340	The Brittingham Family 602 Constitution Ave Washington, DC 20002		
The Paine Family PO Box 10033 Green Bay, WI 54307	The Sousa Family 4966 Euclid Virginia Beach, VA 23462	The Huffaker Family 123 Main St E Las Vegas, NV 11111		
The Duerstine Family 123 1st St E Mpls, MN 55555	The Palmer Family 123 Main St E Langly, WA 98260	The Schaeffer Family 101 Burnsville Pkwy W Burnsville, MN 55337		
The Springer Family 1318 Longworth Washington, DC 20515	The Wittman Family 7114 Cople Hwy Hague, VA 22469	The McMichael Family PO Box 97275 Raleigh, NC 27624		



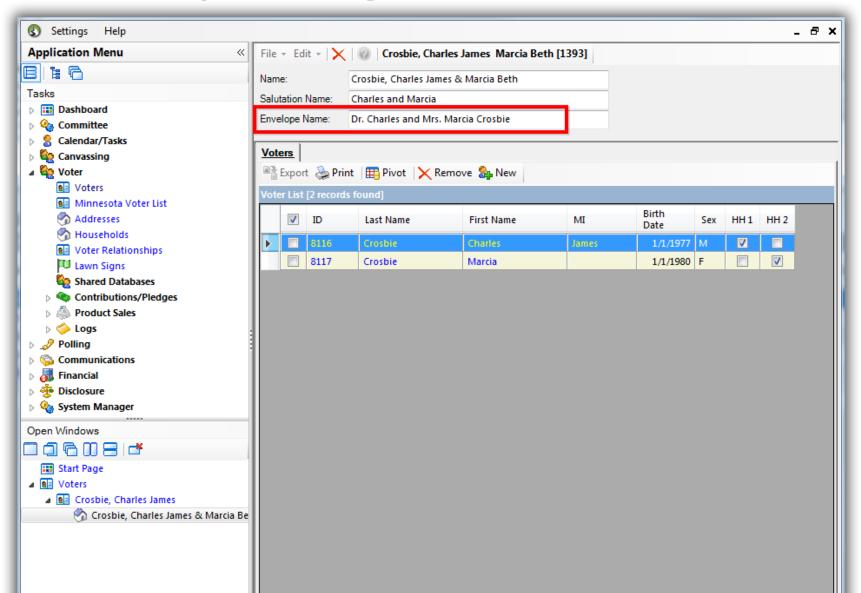
#### #10 - Labels Household and Envelope Name (Use Avery 5160)

This "report" will print out labels using the household envelope name that you create when householding the database.

Img 1 of 3 – Example Household Record with the Envelope Name Merge Field Present



### Location of the household record where the 'Labels Household and Envelope Name (Use Avery 5160) will merge from.

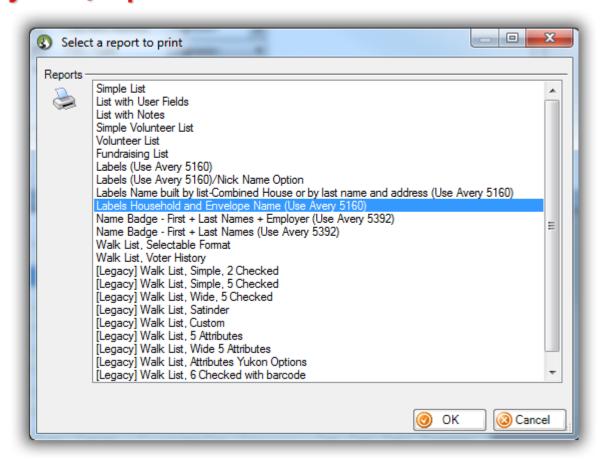




Img 2 of 3 – Selecting the 'Labels Household and Envelope Name (Use Avery 5160) Report'



# Selecting the 'Labels Household and Envelope Name (Use Avery 5160) report.







#### **Example print preview of the Labels Household and Envelope Name (Use Avery 5160) report.**

Print   🎤 🎾   º □ Less 🛗 More   🕡 🕢 1	🕡 🚺 🎏 Print Settings		
Christine Baumgardner 3927 West Broadway Apt 101 Robbinsdale, MN 55422	Charles and Marcia Crosbie 13233 Revere Ln N Champlin, MN 55316	Tony and Kimberly Dooley 4656 West Broadway Robbinsdale, MN 55422	
Dawn Haberle	Steven and Ginger Judovsky	Donald Magstadt	
7351 40th Ave N	2526 Brookdale Ln N	5748 Elmhurst Ave N	
New Hope, MN 55427	Brooklyn Park, MN 55444	Crystal, MN 55428	
Todd and Amy Moser 5307 Edgewood Ave N Crystal, MN 55428	Bette and Hewitt Peterson 100 Clydesdale Trl Apt 325 Hamel, MN 55340	Charles Brittingham 602 Constitution Ave Washington, DC 20002	
Isaiah Paine	Missi Sousa and Graham Stolle	Alicia and Alicia Huffaker	
PO Box 10033	4966 Euclid	123 Main St E	
Green Bay, WI 54307	Virginia Beach, VA 23462	Las Vegas, NV 11111	
Russ Duerstine	Blair Palmer	Caroline Schaeffer	
123 1st St E	123 Main St E	101 Burnsville Pkwy W	
Mpls, MN 55555	Langly, WA 98260	Burnsville, MN 55337	
Ms. Mary Springer	Kathryn and Kathryn Wittman	Collin McMichael	
1318 Longworth	7114 Cople Hwy	PO Box 97275	
Washington, DC 20515	Hague, VA 22469	Raleigh, NC 27624	
Jerald Burgess	Stuart Watkins	Melva Larson	



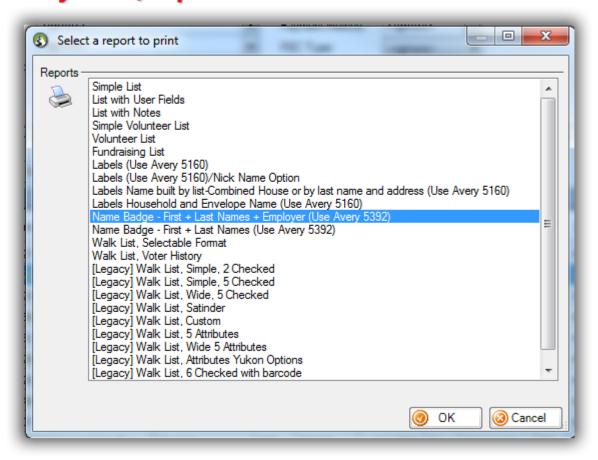
#### #11 - Name Badge - First + Last Names + Employer (Use Avery 5392)

This "report" will print name badges for the list you queried for using their **first name**, last name, and **employer**. This is a common procedure for <u>event</u> registrants.

Img 1 of 2 – Selecting the 'Name Badge – First + Last Names + Employer (Use Avery 5392)' Report

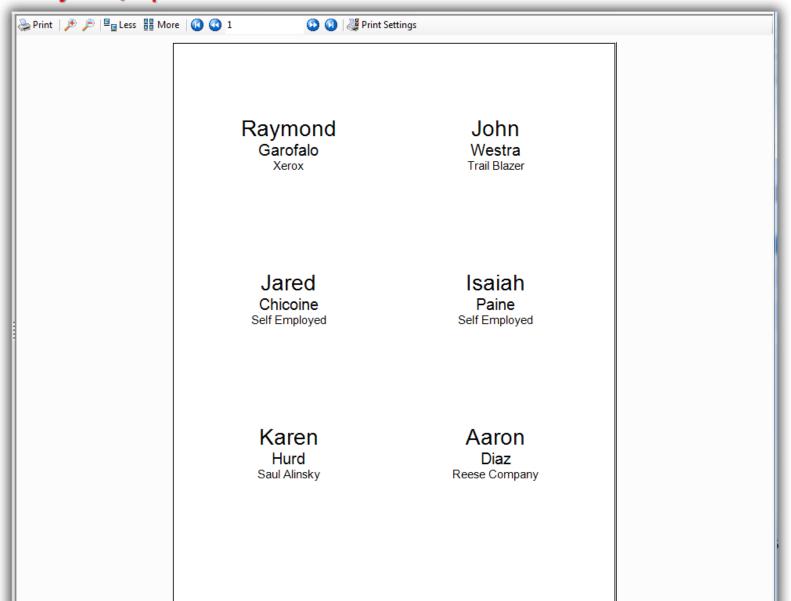


# Selecting the 'Name Badge - First + Last Names + Employer Use Avery 5392) report.





### Example print preview of the 'Name Badge - First + Last Names + Employer (Use Avery 5392) report.



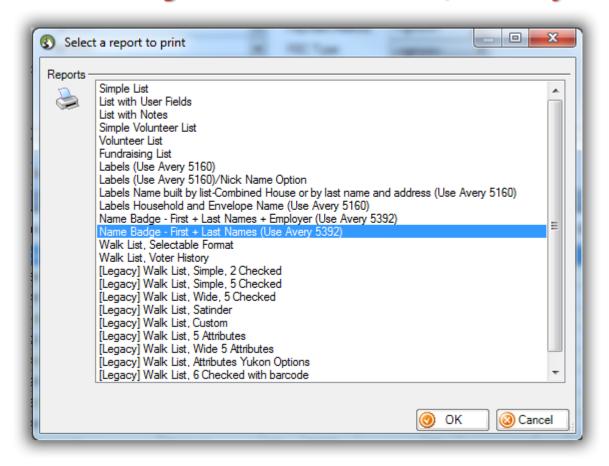


#### #12 - Name Badge - First + Last Names (Use Avery 5392)

This "report" will print **name badges** for the people in the list you queried for (typical for event attendees). It will print out the contact's **first** and **last** name.

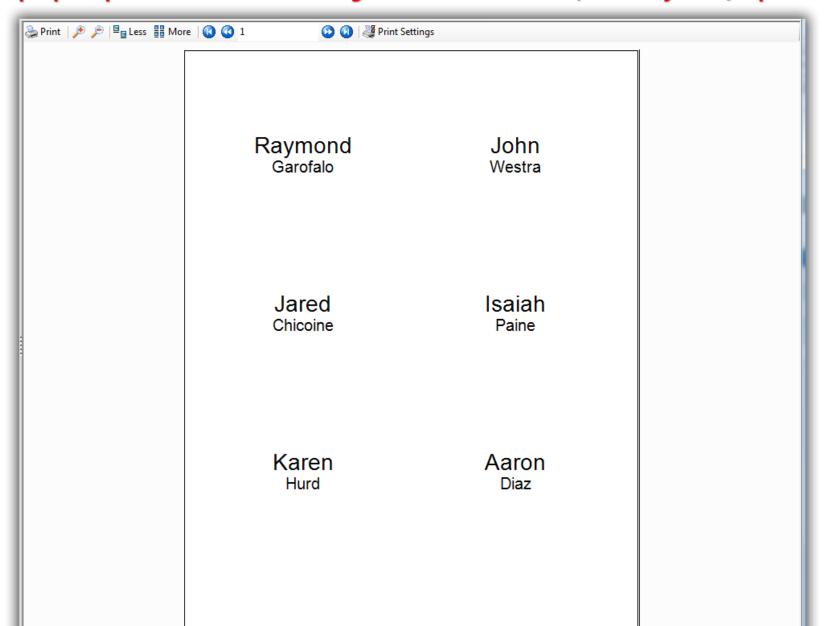
Img 1 of 2 – Selecting the 'Name Badge – First + Last Names (Use Avery 5392)' Report

#### Selecting the 'Name Badge - First + Last Names (Use Avery 5392) report.



Img 2 of 2 – Example Print Preview

#### Example print preview of the 'Name Badge - First + Last Names (Use Avery 5392) report.





#### #13 – Walk List, Selectable Format

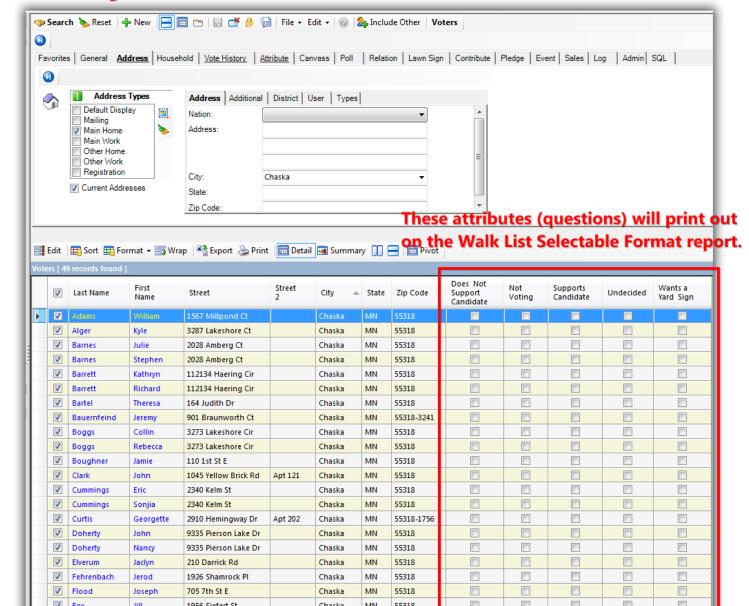
This report is used for **door-to-door canvassers** for political campaigns to use on their paper <u>walk lists</u>. It requires you <u>add in the attribute</u> columns (walk list questions) into the grid via <u>formatting</u> **prior** to running the report. It will also require that you remove unnecessary columns, and widen the columns so the walk list prints out correctly onto paper.

**Tip:** save time and money by using our mobile canvassing app instead of paper walk lists.

Img 1 of 4 – Example Query List of Voters with the Attribute (Questions) Formatted into the Grid as Columns

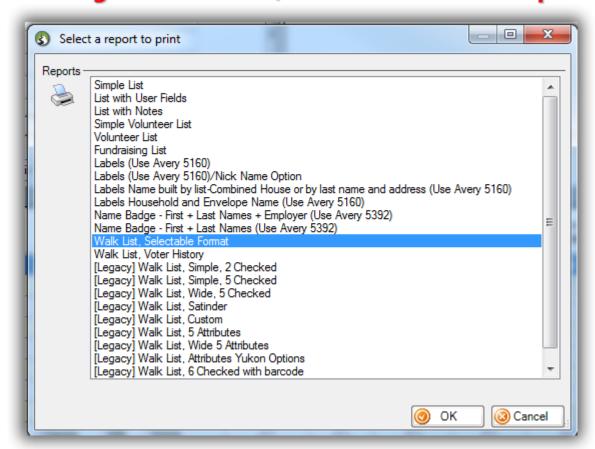


### Example of search query & format with walk list questions (attributes) added into the grid.



Img 2 of 4 – Selecting the Report

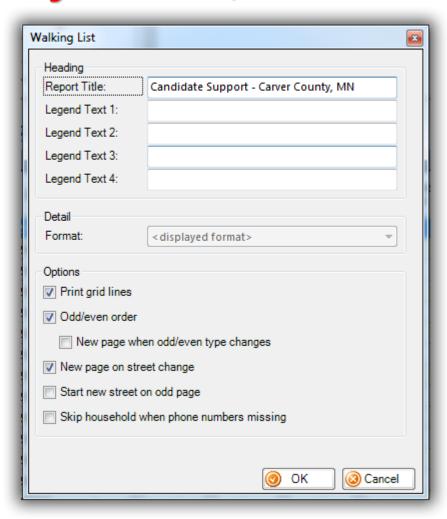
#### Selecting the 'Walk List, Selectable Format' report.





Img 3 of 4 – Configuring the Report Options

#### Configuring the 'Walk List, Selectable Format' report.

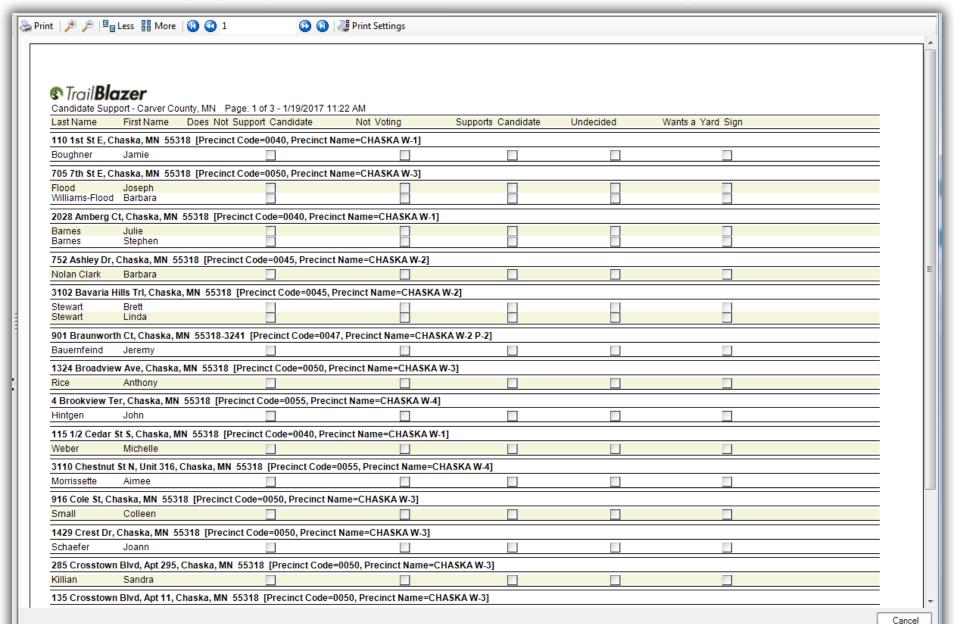




Img 4 of 4 – Example Print Preview



#### Example print preview of the 'Walk List, Selectable Format' report.





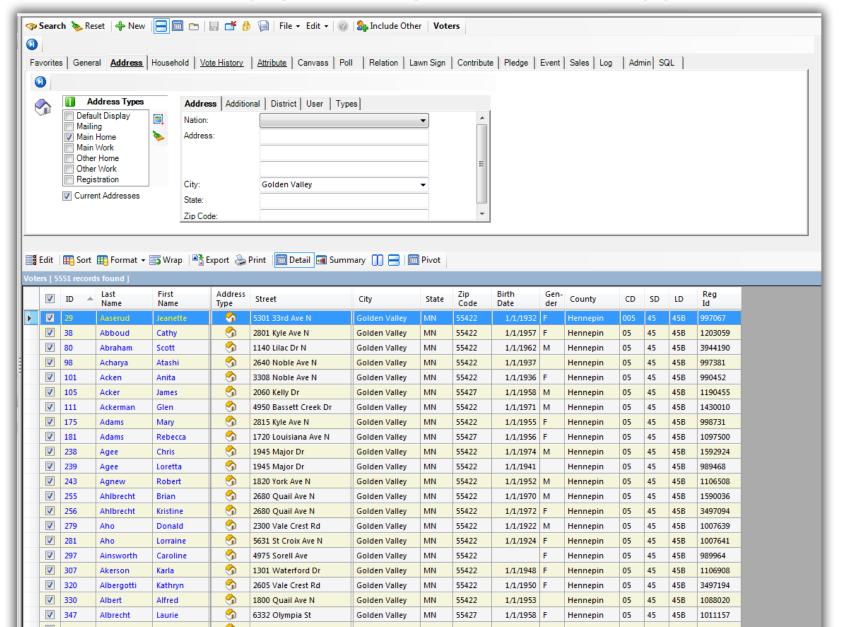
#### #14 - Walk List, Voter History

This is a very useful report for your "door-knockers" to use which provides the past **voter history** of the people they are canvassing. It \*requires you have voter history loaded in your database.

Img 1 of 4 – Build and Run a Search Query for the Voters you are Canvassing



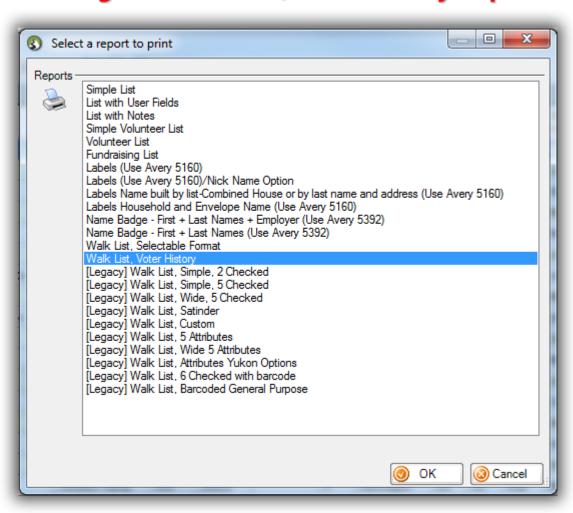
#### Build and run a search query for the voters you want to canvass with a paper walk list.





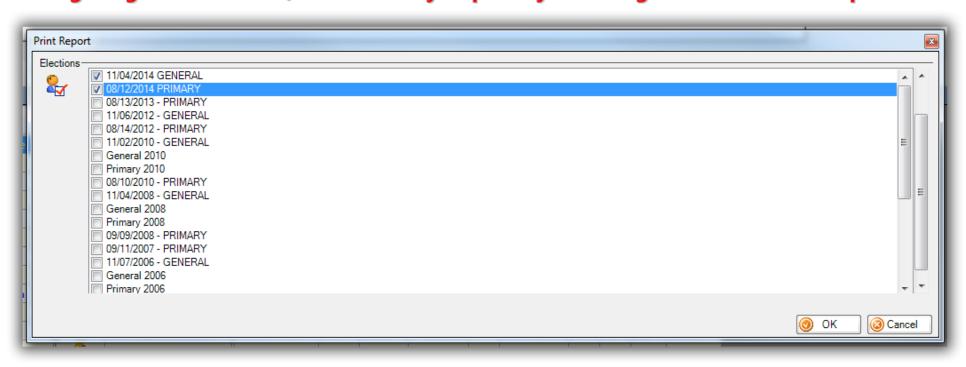
Img 2 of 4 – Selecting the 'Walk List, Voter History' Report

#### Selecting the 'Walk List, Voter History' report.



Img 3 of 4 – Configuring the Report

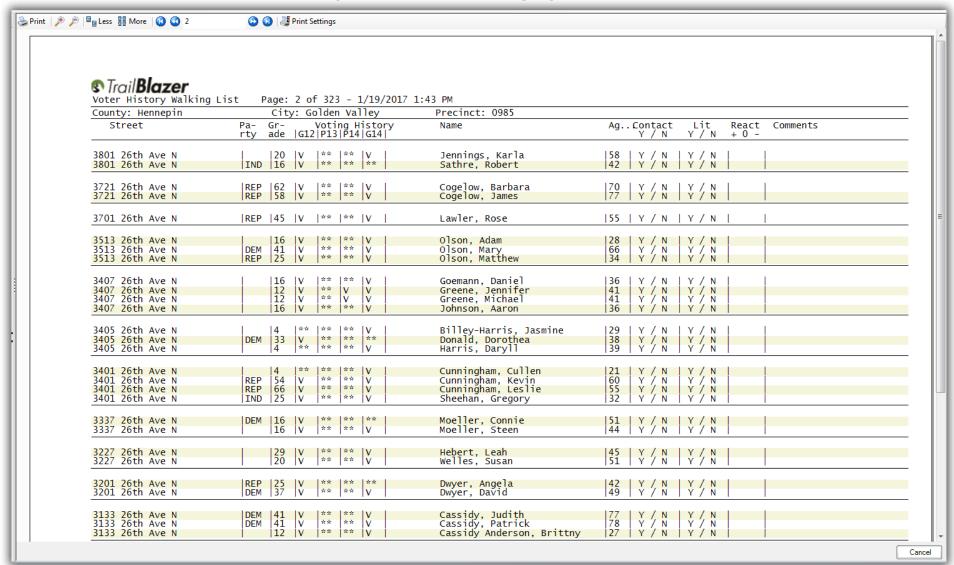
#### Configuring the 'Walk List, Voter History' report by choosing which elections to print out.



Img 4 of 4 – Example Print Preview of the 'Walk List, Voter History' Report



#### **Example Walk List, Vote History report.**



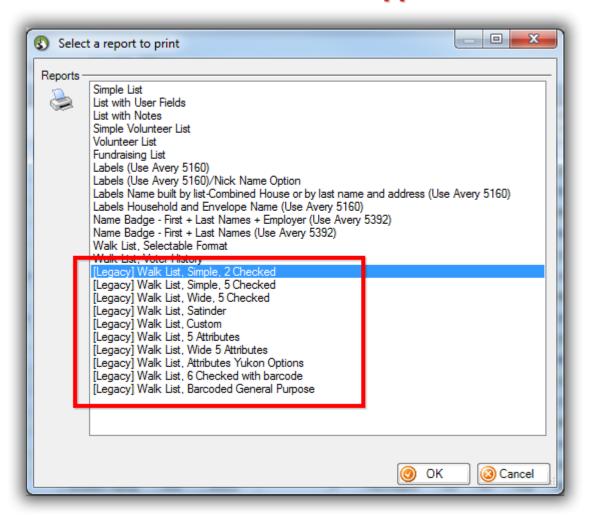


#### #15 – Legacy Reports

These 'legacy' reports are no longer supported in Trail Blazer and will eventually be removed.



# Legacy reports: you can use them but they will eventually be removed from the Trail Blazer application.





The **related resources** below link to a wide variety of similar articles and videos.



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



#### **Related Resources**

**Article:** Walk List Selectable Format

Article: Creating and Saving Default Formats for Reporting with the Grid

Article: Add Attributes, Attribute Dates, and Attribute Notes to the Grid by Formatting them in as Columns

Article: How to Create a Year-by-Year Giving History Report using Filtered Contribution Columns in the Grid – Primarily for Nonprofits

Article: Mobile Base Camp – How to Create and Run a Mobile Canvassing (Walk) List

Article: Are you able to print custom issues/groups and/or log entries on walk/call sheets

Article: Printable Call Book Reports

Article: How to Print Name Badges for Event Registrants – Using Avery 5392 Name Badge Paper

**Article:** How to Print Household Labels

Article: How to Print Mail-Merge Address Labels

**Article:** Printing Envelopes

Article: How to Create Attribute Folders and Attribute Items (Custom Categories)

Video: Attributes Adding New

#### **Trail Blazer Live Support**

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Facebook: https://www.facebook.com/pages/Trail-Blazer-Software/64872951180

Twitter: <a href="https://twitter.com/trailblazersoft">https://twitter.com/trailblazersoft</a>

\* As a policy we require that you have taken our intro training class before calling or emailing our live support team.

<u>Click here</u> 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 <u>GoToMeeting</u> session where we host our live interactive trainings.
- \* This service is included in your contract.