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**Last Updated:** 2016-10-19

## Overview

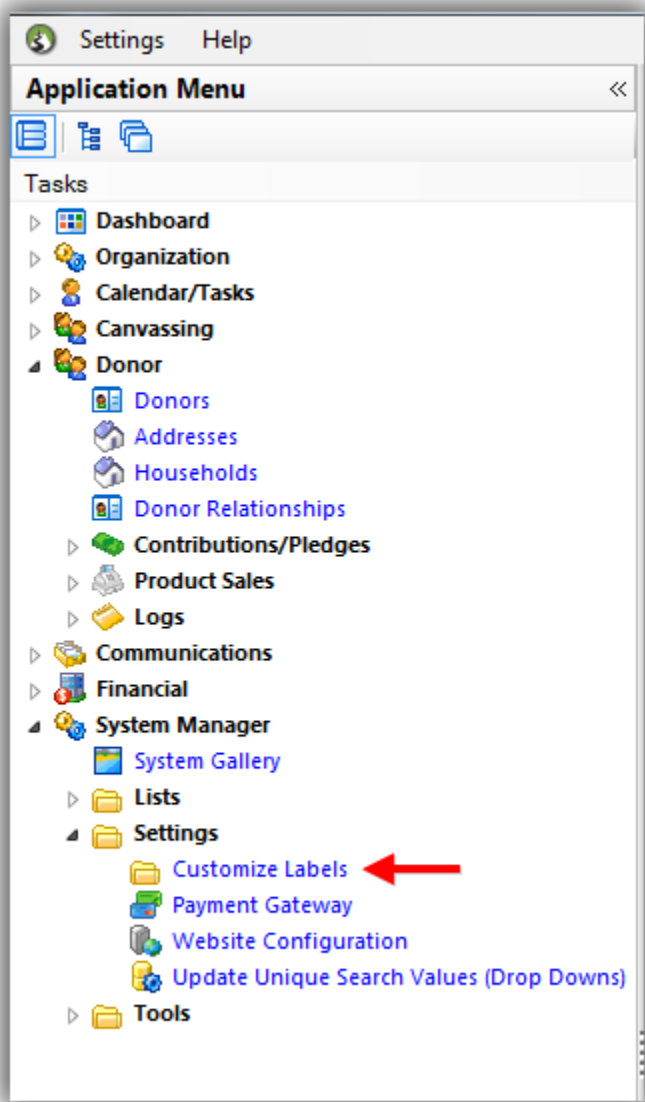
By default **Trail Blazer** has certain **list & label** names (i.e. voters or donors) throughout the application depending on what version you're using (political or nonprofit). You may want to change some of these labels to something that makes more sense to your organization. For instance, it's quite common to change the list for 'donors' to something more generic like 'contacts', or you may want to use a field like 'Social Security Number' to track something else like 'Password Number'.

This article walks through the steps to perform this task, and shows all the customizable fields at your disposal. **Note** that these changes will affect all database users with access to your database, and it requires appropriate [admin security access](#) to accomplish this task.

 **Tip:** There are **two ways** to change field names. One is by **right-clicking** on them (*in areas of the application that support this*) and the other is from the '**Custom Labels**' list under the Application Menu. Both are covered below.

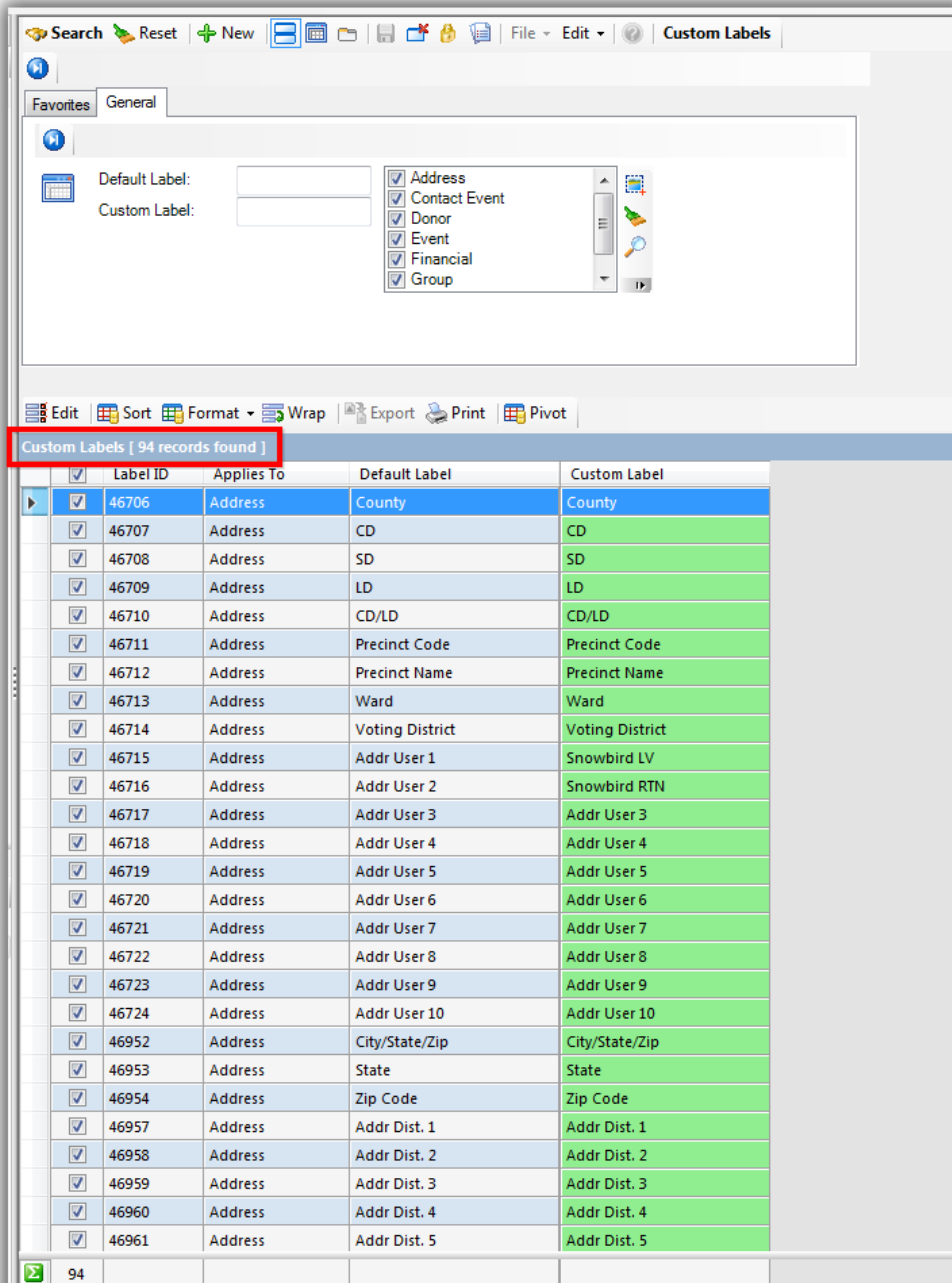
## Steps

Navigate to the 'Custom Labels' list by following **Application Menu > System Manager > Settings > Customize Labels**



As of the time this article was written there were **94** labels that can be customized:

## Full list of customizable labels.



The screenshot shows the 'Custom Labels' application window. At the top, there is a toolbar with 'Search', 'Reset', 'New', and 'File Edit' menus. Below the toolbar, there are 'Favorites' and 'General' tabs. The 'General' tab contains input fields for 'Default Label' and 'Custom Label', and a list of categories with checkboxes: Address, Contact Event, Donor, Event, Financial, and Group. Below this is another toolbar with 'Edit', 'Sort', 'Format', 'Wrap', 'Export', 'Print', and 'Pivot' options. A red box highlights the header of the data table: 'Custom Labels [ 94 records found ]'. The table has five columns: 'Label ID', 'Applies To', 'Default Label', and 'Custom Label'. The first row is highlighted in blue, and the rest of the rows are highlighted in green. The table lists 94 records, with the last one being '46961 Address Addr Dist. 5 Addr Dist. 5'. A status bar at the bottom left shows '94' records.

Label ID	Applies To	Default Label	Custom Label
46706	Address	County	County
46707	Address	CD	CD
46708	Address	SD	SD
46709	Address	LD	LD
46710	Address	CD/LD	CD/LD
46711	Address	Precinct Code	Precinct Code
46712	Address	Precinct Name	Precinct Name
46713	Address	Ward	Ward
46714	Address	Voting District	Voting District
46715	Address	Addr User 1	Snowbird LV
46716	Address	Addr User 2	Snowbird RTN
46717	Address	Addr User 3	Addr User 3
46718	Address	Addr User 4	Addr User 4
46719	Address	Addr User 5	Addr User 5
46720	Address	Addr User 6	Addr User 6
46721	Address	Addr User 7	Addr User 7
46722	Address	Addr User 8	Addr User 8
46723	Address	Addr User 9	Addr User 9
46724	Address	Addr User 10	Addr User 10
46952	Address	City/State/Zip	City/State/Zip
46953	Address	State	State
46954	Address	Zip Code	Zip Code
46957	Address	Addr Dist. 1	Addr Dist. 1
46958	Address	Addr Dist. 2	Addr Dist. 2
46959	Address	Addr Dist. 3	Addr Dist. 3
46960	Address	Addr Dist. 4	Addr Dist. 4
46961	Address	Addr Dist. 5	Addr Dist. 5

Any cell that's **green** allows you to **double-click** in it to **overwrite the value**. In this *example* I changed the label for 'Donor' to 'Contacts' since I'm tracking more than just donors in the database (i.e. Prospects, Volunteers, Alumni, etc.).

Search Reset New File Edit Custom Labels

Favorites General

Default Label:  Custom Label:

- Address
- Contact Event
- Donor
- Event
- Financial
- Group

Edit Sort Format Wrap Export Print Pivot

Custom Labels [ 94 records found ]

<input checked="" type="checkbox"/>	Label ID	Applies To	Default Label	Custom Label
<input checked="" type="checkbox"/>	46705	Donor	User Decimal 3	Ask Amount
<input checked="" type="checkbox"/>	46707	Address	CD	CD
<input checked="" type="checkbox"/>	46710	Address	CD/LD	CD/LD
<input checked="" type="checkbox"/>	46955	Donor	Cell Phone	Cell Phone
<input checked="" type="checkbox"/>	46691	Donor	User Field 4	Center
<input checked="" type="checkbox"/>	46949	Financial	Check	Check
<input checked="" type="checkbox"/>	46697	Donor	User Field 10	Church Affiliation
<input checked="" type="checkbox"/>	50510	Address	City Council	City Council
<input checked="" type="checkbox"/>	46952	Address	City/State/Zip	City/State/Zip
<input checked="" type="checkbox"/>	46688	Donor	User Field 1	Class Year
<input checked="" type="checkbox"/>	50505	Address	Comm / Police Jury	Comm / Police Jury
<input checked="" type="checkbox"/>	46786	Group	Ethnicity	Contact Method
<input checked="" type="checkbox"/>	46690	Donor	User Field 3	Coop Member
<input checked="" type="checkbox"/>	46706	Address	County	County
<input checked="" type="checkbox"/>	46685	Donor	Donor	Contact
<input checked="" type="checkbox"/>	46686	Donor	Donor ID	Donor ID
<input checked="" type="checkbox"/>	53044	Donor	Employer	Employer
<input checked="" type="checkbox"/>	52619	Event	Event User 1	Event User 1
<input checked="" type="checkbox"/>	52620	Event	Event User 2	Event User 2
<input checked="" type="checkbox"/>	52621	Event	Event User 3	Event User 3
<input checked="" type="checkbox"/>	52622	Event	Event User 4	Event User 4
<input checked="" type="checkbox"/>	46692	Donor	User Field 5	Favorite classes
<input checked="" type="checkbox"/>	50508	Address	Hospital	Hospital
<input checked="" type="checkbox"/>	46704	Donor	User Decimal 2	Hourly Rate
<input checked="" type="checkbox"/>	46783	Group	Issues	Interests
<input checked="" type="checkbox"/>	46709	Address	LD	LD
<input checked="" type="checkbox"/>	46696	Donor	User Field 9	License

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**Any cell in green allows you to overwrite it. In this example I renamed 'Donor' to 'Contact'.**

[www.trailblz.com/kb](http://www.trailblz.com/kb)

After making your change(s) you'll need to click **[Save]** or **[Save and Close]** in the bottom-right.



Search Reset New [Icons] File Edit Custom Labels

Favorites General

Default Label:   
 Custom Label:

- Address
- Contact Event
- Donor
- Event
- Financial
- Group

Edit Sort Format Wrap Export Print Pivot

Custom Labels [ 94 records found ]

<input checked="" type="checkbox"/>	Label ID	Applies To	Default Label	Custom Label
<input checked="" type="checkbox"/>	46955	Donor	Cell Phone	Cell Phone
<input checked="" type="checkbox"/>	46949	Financial	Check	Check
<input checked="" type="checkbox"/>	50510	Address	City Council	City Council
<input checked="" type="checkbox"/>	46952	Address	City/State/Zip	City/State/Zip
<input checked="" type="checkbox"/>	50505	Address	Comm / Police Jury	Comm / Police Jury
<input checked="" type="checkbox"/>	46706	Address	County	County
<input checked="" type="checkbox"/>	46685	Donor	Donor	Contact
<input checked="" type="checkbox"/>	46686	Donor	Donor ID	Donor ID
<input checked="" type="checkbox"/>	53044	Donor	Employer	Employer
<input checked="" type="checkbox"/>	46786	Group	Ethnicity	Contact Method
<input checked="" type="checkbox"/>	52619	Event	Event User 1	Event User 1
<input checked="" type="checkbox"/>	52620	Event	Event User 2	Event User 2
<input checked="" type="checkbox"/>	52621	Event	Event User 3	Event User 3
<input checked="" type="checkbox"/>	52622	Event	Event User 4	Event User 4
<input checked="" type="checkbox"/>	50508	Address	Hospital	Hospital
<input checked="" type="checkbox"/>	46783	Group	Issues	Interests
<input checked="" type="checkbox"/>	46709	Address	LD	LD
<input checked="" type="checkbox"/>	50513	Address	Mcd Code	Mcd Code
<input checked="" type="checkbox"/>	50512	Address	Mcd Name	Mcd Name

94

Logon = [Joel Kristenson](#)

Save Save and Close Reports Close

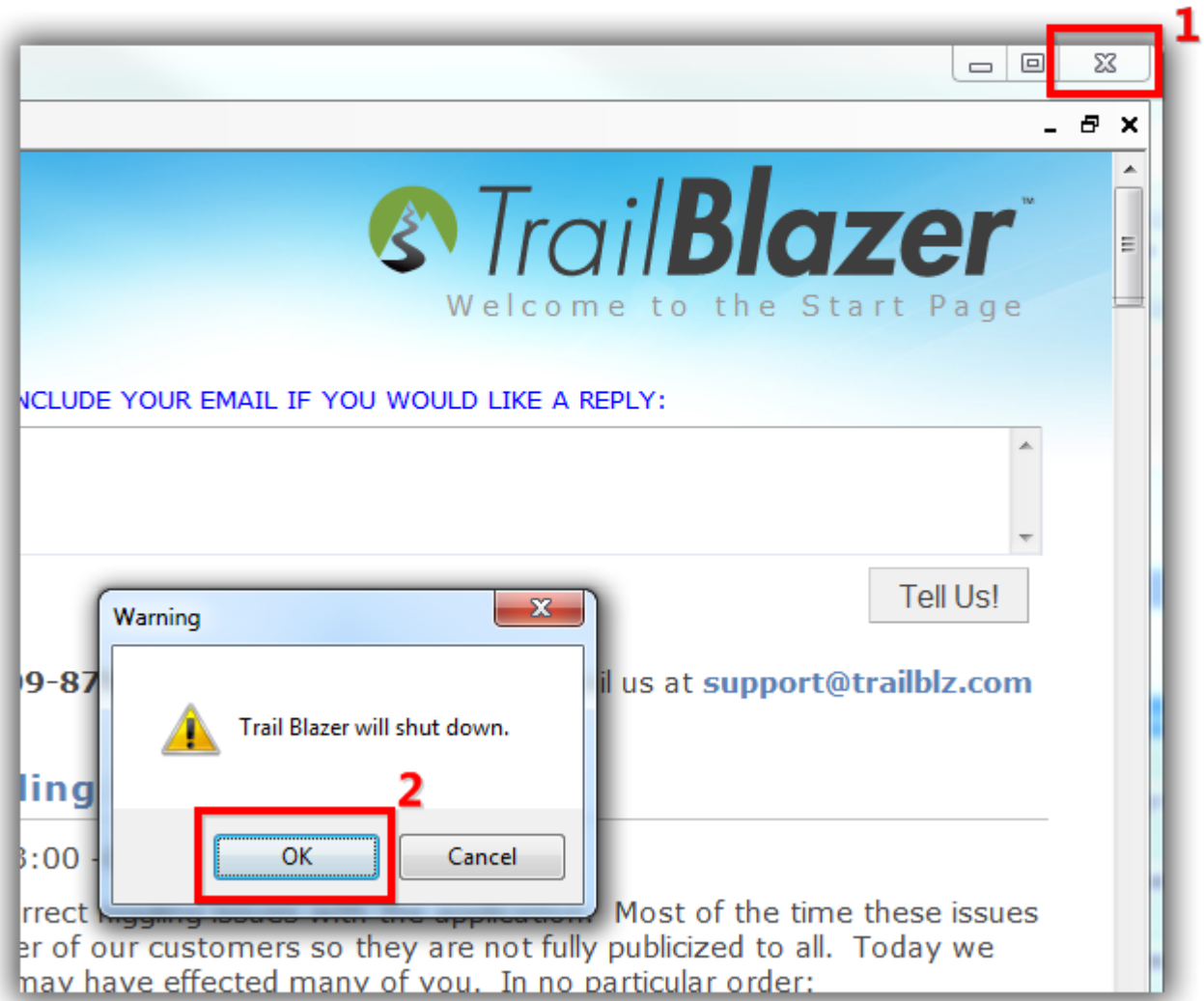
**General Help**  
Clicking [Save] saves all updates without closing the current screen.

After making your change(s) you'll need to click

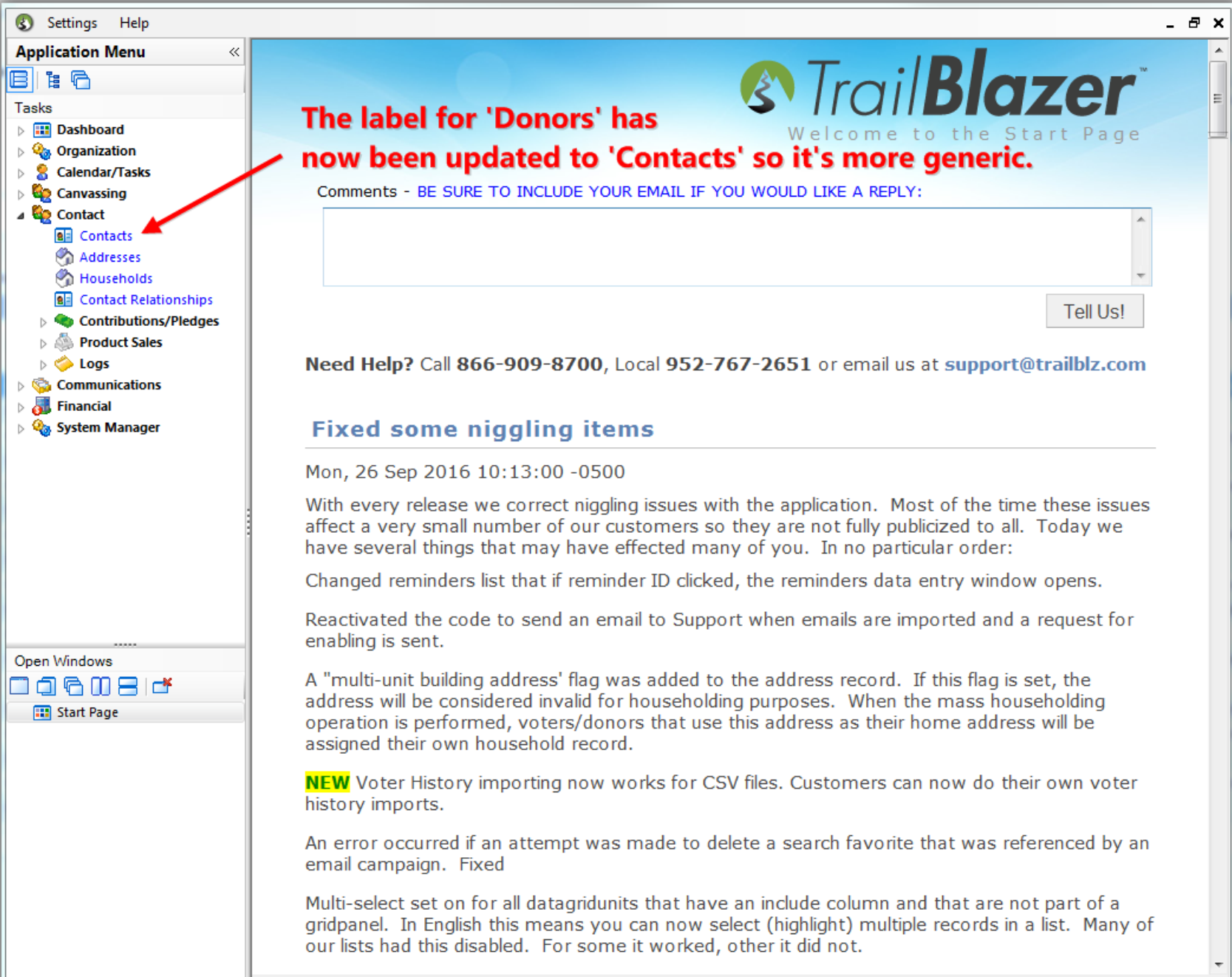
**Important:** When changing labels via the 'custom labels' list it **\*requires\*** that you **log out and log back in** for the changes to take effect. When changing them from within a contact's record card, it requires that you open a **new search window** for the changes to take effect.

After making your changes in the Customize Labels list, **close down** the **Trail Blazer** application by clicking the red **[x]** in the upper-right, and then click **[OK]**.

**For the changes to custom labels & lists to take effect you'll need to close and re-launch the application.**



Navigate to the location(s) where you made changes to confirm they look how you want. *In this example my main 'Donors' list is now called 'Contacts'.*



The screenshot shows the TrailBlazer application interface. On the left is the 'Application Menu' with a tree view of tasks. A red arrow points from the text 'The label for 'Donors' has now been updated to 'Contacts' so it's more generic.' to the 'Contacts' item in the menu. The main content area displays a 'Welcome to the Start Page' banner with the TrailBlazer logo. Below the banner is a comment form with a 'Tell Us!' button. Further down, there is a 'Need Help?' section with contact information, followed by a 'Fixed some niggling items' section with a list of updates.

**The label for 'Donors' has now been updated to 'Contacts' so it's more generic.**

Comments - **BE SURE TO INCLUDE YOUR EMAIL IF YOU WOULD LIKE A REPLY:**

**Need Help?** Call **866-909-8700**, Local **952-767-2651** or email us at [support@trailblz.com](mailto:support@trailblz.com)

### Fixed some niggling items

Mon, 26 Sep 2016 10:13:00 -0500

With every release we correct niggling issues with the application. Most of the time these issues affect a very small number of our customers so they are not fully publicized to all. Today we have several things that may have effected many of you. In no particular order:

- Changed reminders list that if reminder ID clicked, the reminders data entry window opens.
- Reactivated the code to send an email to Support when emails are imported and a request for enabling is sent.
- A "multi-unit building address" flag was added to the address record. If this flag is set, the address will be considered invalid for householding purposes. When the mass householding operation is performed, voters/donors that use this address as their home address will be assigned their own household record.

**NEW** Voter History importing now works for CSV files. Customers can now do their own voter history imports.

An error occurred if an attempt was made to delete a search favorite that was referenced by an email campaign. Fixed

Multi-select set on for all datagridunits that have an include column and that are not part of a gridpanel. In English this means you can now select (highlight) multiple records in a list. Many of our lists had this disabled. For some it worked, other it did not.

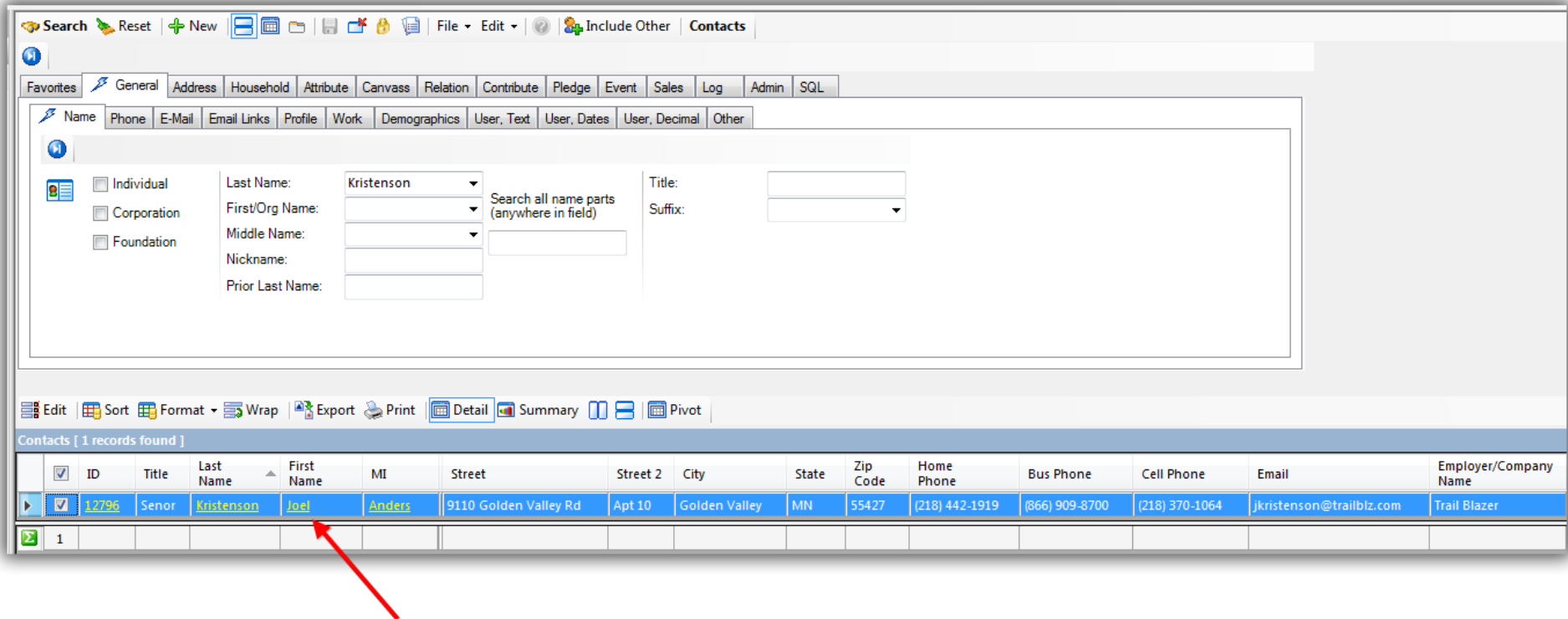
To change a label **using the right-click method**, you have two options:

- From within a contact's record card
- From the search panel

*For this example I used the option to change it from within a contact's record card.*

[Search](#) for and **open** any contact (donor/voter) in your database. *I used my own record for this example, you could just as well run an **open search** and load the top 100.*

## 1. Run your search query for a contact record (any contact will work).



The screenshot shows the TrailBlazer interface with a search query for contacts. The search criteria are set to 'Individual' with 'Last Name' as 'Kristenson'. The results table shows one record:

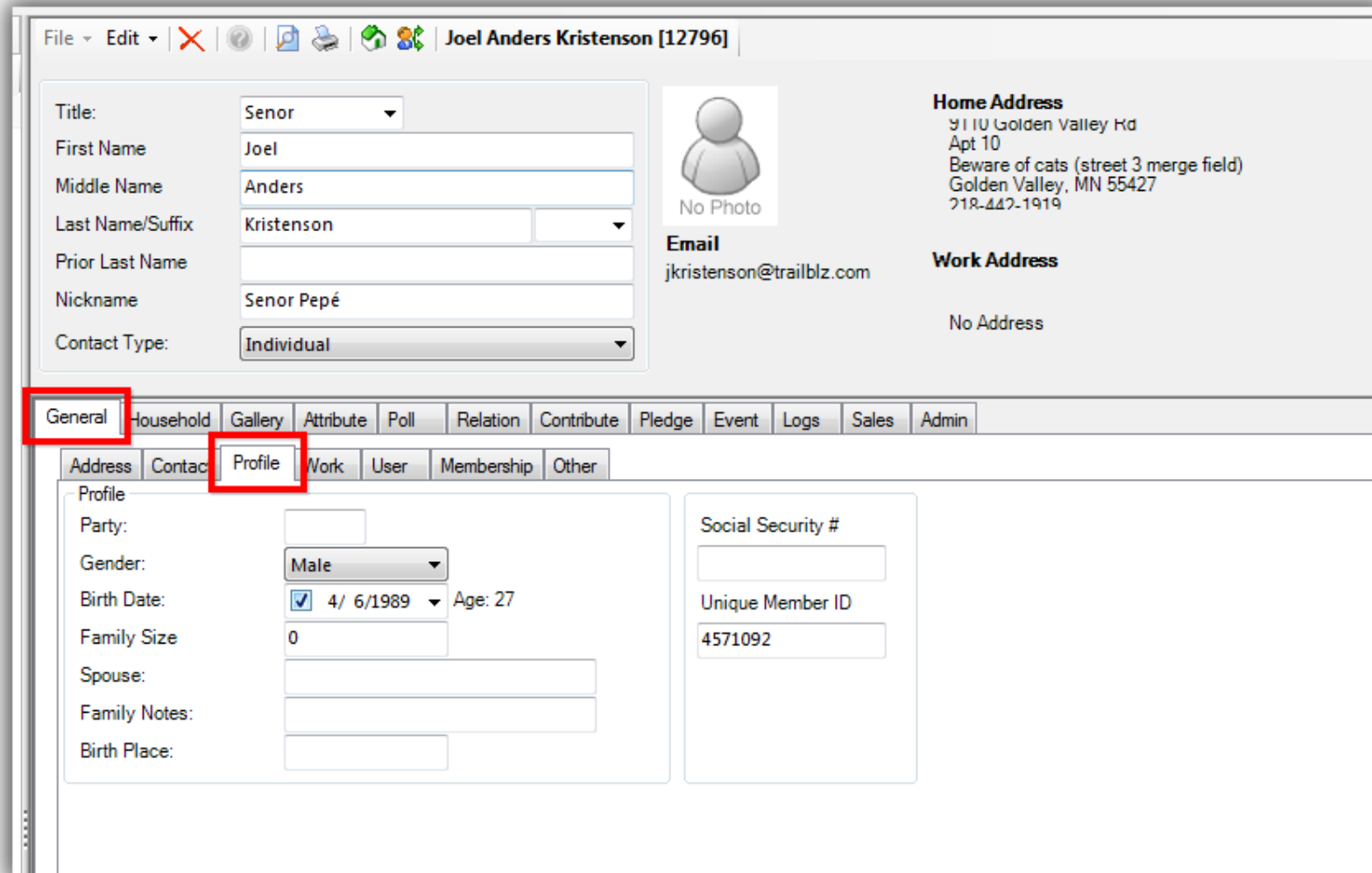
ID	Title	Last Name	First Name	MI	Street	Street 2	City	State	Zip Code	Home Phone	Bus Phone	Cell Phone	Email	Employer/Company Name
12796	Senor	Kristenson	Joel	Anders	9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427	(218) 442-1919	(866) 909-8700	(218) 370-1064	jkristenson@trailblz.com	Trail Blazer

A red arrow points to the 'Joel' entry in the 'First Name' column.

## 2. Click on the person's name to open their record card.

Navigate to the section that has the field you want to rename – (*NOT ALL FIELDS ARE CUSTOMIZABLE*) – in this example I went to the **General > Profile** sub-tab which has a default field for **Social Security #**.

**Navigate to the section of the record card that has the field label you want to rename.**



File Edit [Icons] Joel Anders Kristenson [12796]

Title:

First Name:

Middle Name:

Last Name/Suffix:

Prior Last Name:

Nickname:

Contact Type:

**Home Address**  
9110 Golden Valley Rd  
Apt 10  
Beware of cats (street 3 merge field)  
Golden Valley, MN 55427  
218-447-1919

**Work Address**  
No Address

**Email**  
jkristenson@trailblz.com

**Profile**

Party:

Gender:

Birth Date:  4/ 6/1989 Age: 27

Family Size:

Spouse:

Family Notes:

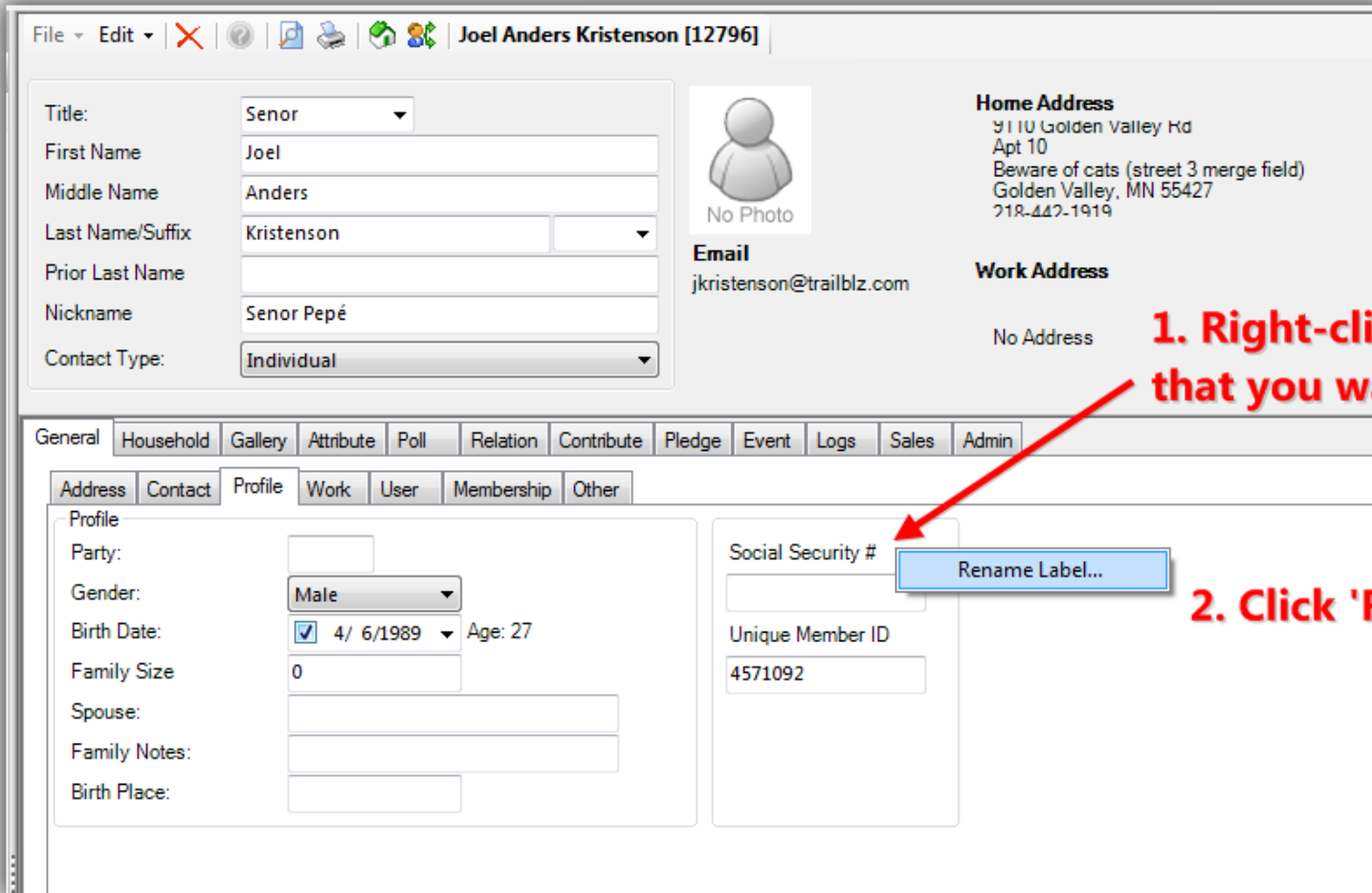
Birth Place:

Social Security #:

Unique Member ID:

**Right-click** on the field label that you want to rename and select **'Rename Label...'**.





File Edit X [Icons] Joel Anders Kristenson [12796]

Title:

First Name:

Middle Name:

Last Name/Suffix:

Prior Last Name:

Nickname:

Contact Type:

**Home Address**  
9110 Golden Valley Rd  
Apt 10  
Beware of cats (street 3 merge field)  
Golden Valley, MN 55427  
718-447-1919

**Work Address**  
No Address

**Email**  
jkristenson@trailblz.com

General Household Gallery Attribute Poll Relation Contribute Pledge Event Logs Sales Admin

Address Contact Profile Work User Membership Other

Profile

Party:

Gender:

Birth Date:  4/ 6/1989 Age: 27

Family Size:

Spouse:

Family Notes:

Birth Place:

Social Security #  **Rename Label...**

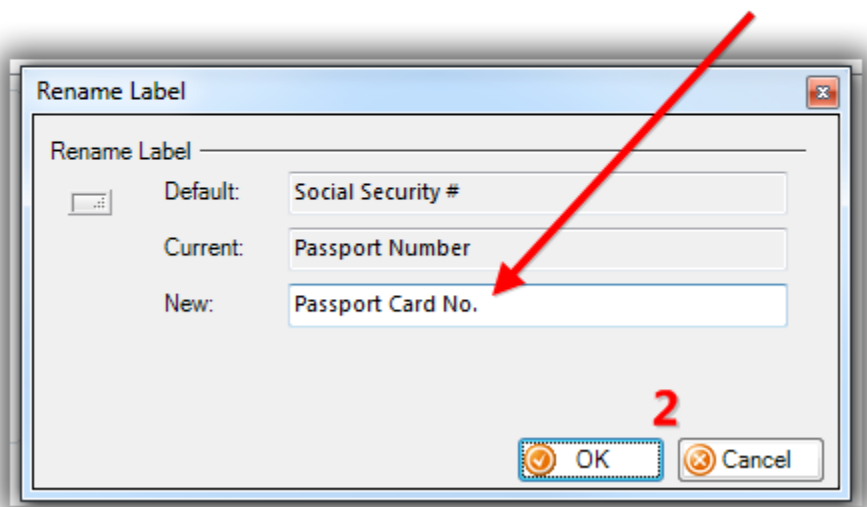
Unique Member ID  
4571092

**1. Right-click on the field label that you want to rename.**

**2. Click 'Rename Label...'**

Create a new **name** for your label and click [OK]. *In this example I renamed 'Social Security #' to 'Passport Number'.*

**1. Create a new name for your custom label. (This will affect all database users).**



The label will now reflect the change.

File Edit ✖ 🔍 📄 🖨 🌱 👤 👥 Joel Anders Kristenson [12796]

Title:

First Name:


Middle Name:

Last Name/Suffix:

Prior Last Name:

Nickname:

Contact Type:



**Home Address**  
 9110 Golden Valley Rd  
 Apt 10  
 Beware of cats (street 3 merge field)  
 Golden Valley, MN 55427  
 718-442-1919

**Work Address**  
 No Address

General Household Gallery Attribute Poll Relation Contribute Pledge Event Logs Sales Admin

Address Contact Profile Work User Membership Other

Profile

Party:

Gender:

Birth Date:  4/ 6/1989 Age: 27

Family Size:

Spouse:

Family Notes:

Birth Place:

Passport Card No.

Unique Member ID

You can now record data in this field within any contact's record card.

\*Most of the labels that are used to collect data on a contact record can be **queried by** back in the Contacts (Voters/Donors) list.

You can also add them into your reports as columns by via [Formatting](#). The system will **rename the column** to whatever you called it, my *example* is below.

Img 1 of 2 – Formatting in the Column using the New Custom Label Name

**1. Click [Format] and select 'Columns...'**

**2. Scroll up and down the list until you find the new 'custom label name' that you created.**

**3**

ID	Title	Last Name	First Name
2		Aagard	Martha
3	Ms.	Aakhus	Ariel
5		Aakhus	Steven
7		Aanenson	Pamela
8		Aanonson	Leland
12699		Aaron	Mithran
13847		Abbot	Amy
13185		Abbott	Fred
9		Abbott	Gina
10966	Ms.	Abbott	Janice
13243		Abbott	Ronald
10		Abbott	Steven
14		Abdulali	Quaid
14178		Abdullahi	Rachel
15		Abdurahman	Ayan
14533		Abel	Donald

Img 2 of 2 – How the Column Looks in the Grid

Search Reset New File Edit Include Other Contacts

Favorites General Address Household Attribute Canvass Relation Contribute Pledge Event Sales Log Admin SQL

Contribute Marketing Notion

Date Range: <custom, according to dates below>

Cycle: <ignore>

Event: <ignore>

Amount Range: 10000 to maximum

Awaiting Thank-You Letters

Awaiting Thank-You Phone Call

Payment Method: <ignore>

Single Contribution

Allocation Fund: <ignore>

Edit Sort Format Wrap Export Print Detail Summary Pivot

Contacts [ 203 records found ]

<input checked="" type="checkbox"/>	ID	Last Name	First Name	MI	Passport Card No.	Street	Street 2	City	State	Zip Code	Bus Phone	Cell Phone	Email	Employer/Company Name
<input checked="" type="checkbox"/>	5945	Nicholie	James	D		5334 Stevens Ave S		Minneapolis	MN	55419			James@Nicholie.com	
<input checked="" type="checkbox"/>	1080	Byers	Jamie	Lee		919 3rd St NE		Faribault	MN	55021			Jamie@Byers.com	
<input checked="" type="checkbox"/>	5331	McKown	Jane	Anne		2171 Pinehurst Dr		Chanhausen	MN	55317			Jane@McKown.com	
<input checked="" type="checkbox"/>	5705	Mosley	Janet	Mary		11330 Gladiola St NW		Coon Rapids	MN	55433				
<input checked="" type="checkbox"/>	3431	Holmers	Jason	Lee		175 Willoughby Way E		Minnetonka	MN	55305			Jason@Holmers.com	
<input checked="" type="checkbox"/>	3012	Hardman	Jean	Ely		8601 Flying Cloud Dr		Eden Prairie	MN	55344			Jean@Hardman.com	
<input checked="" type="checkbox"/>	461	Beckwith	Jeanette	C	C00001245	808 1st Dr NW	Apt 313	Austin	MN	55912			Jeanette@Beckwith.com	
<input checked="" type="checkbox"/>	7418	Schmittou	Jeffery	Allen		4824 Colorado St		Duluth	MN	55804			Jeffery@Schmittou.com	
<input checked="" type="checkbox"/>	3270	Heroux	Jeffrey	Morris		295 Winthrop St S		St Paul	MN	55119			Jeffrey@Heroux.com	
<input checked="" type="checkbox"/>	9468	Withey	Jessica			424 Main St E		Edmore	MI	48829			jessica@withey.com	
<input checked="" type="checkbox"/>	384	Barron	Jillian	N		404 Mason St		Marshall	MN	56258			Jillian@Barron.com	
<input checked="" type="checkbox"/>	12796	Kristenson	Joel	Anders	C00002952	9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427	(866) 909-8700	(654) 897-9875	jkristenson@trailblz.com	Trail Blazer
<input checked="" type="checkbox"/>	160	Anderson	John	A	C00004879	6580 132nd St W		Apple Valley	MN	55124				
<input checked="" type="checkbox"/>	10950	Ramantanin	John			12346 Washing Blvd E		Inman	SC	29349			John@Ramantanin.com	
<input checked="" type="checkbox"/>	7485	Schultz	John	E H		1109 Washington St		Northfield	MN	55057				
<input checked="" type="checkbox"/>	3982	Juenger	Jordan	M		19213 510th Ave		Austin	MN	55912			Jordan@Juenger.com	
<input checked="" type="checkbox"/>	6361	Paul	Judy	Cook		410 Zircon Ln N		Plymouth	MN	55447				
<input checked="" type="checkbox"/>	6496	Petersen	Julie	Marie		5636 Yates Ave N		Crystal	CT	06500			Julie@Petersen.com	
<input checked="" type="checkbox"/>	9253	Keohane	Kaaren	Evelyn		1735 Orchid Dr N		North Mankato	MN	56003	(507) 345-4629		kk@ywca.org	
<input checked="" type="checkbox"/>	6497	Petersen	Kahla	J		702 Appel St E		Springfield	MN	56087			Kahla@Petersen.com	
<input checked="" type="checkbox"/>	5398	Melemed	Katherine	Ann		2408 Indian Rd W		Minnetonka	CT	06500			Katherine@Melemed.com	
<input checked="" type="checkbox"/>	8301	Thompson	Kathleen	M		6349 Utah Ave N		Brooklyn Park	CT	06500			Kathleen@Thompson.com	
<input checked="" type="checkbox"/>	5086	Malherek	Keith	Steven		519 10th Ave SE	Apt 1	Minneapolis	MN	55414			Keith@Malherek.com	
<input checked="" type="checkbox"/>	5871	Nelson	Kenneth	John		1100 Robin Ct		New Brighton	MN	55112			Kenneth@Nelson.com	

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The **Related Resources** below link to a variety of similar articles and videos.



**Trail Blazer™**

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



## Related Resources

**Article:** [Creating and Saving Default Formats for Reporting with the Grid](#)

**Article:** [How to Rename User Fields, Query by them, Add them to the Grid as Columns, and Utilizing them as Merge Fields in Letter & E-Mail Templates](#)

**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:** [Walk List – Selectable Format](#)

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

**Video:** [Reporting 103 – Format with various contribution columns](#)

**Video:** [Reporting 102 – Quick Reports and Export](#)

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

## Trail Blazer Live Support

☎ **Phone:** 1-866-909-8700

✉ **Email:** [support@trailblz.com](mailto:support@trailblz.com)

📘 **Facebook:** <https://www.facebook.com/pages/Trail-Blazer-Software/64872951180>

🐦 **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.*