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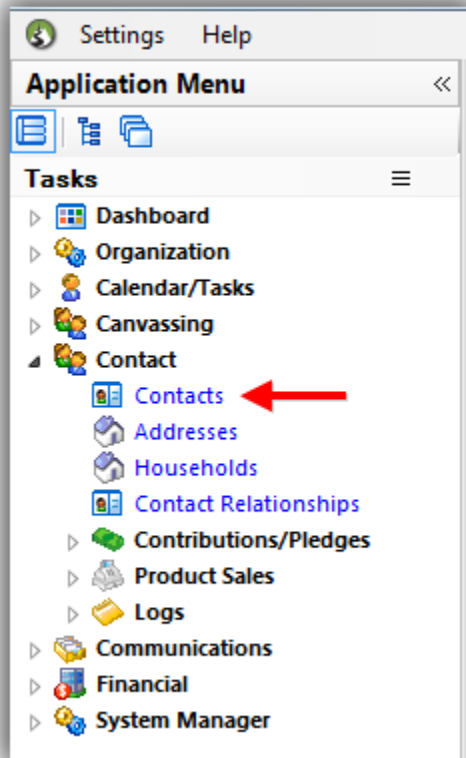
Overview

This article walks through the steps to setup a **new database user** and how to provide them with **security access**. **To create a new user you must be a database administrator with full admin rights.**

 **Tip:** Read [this article](#) to learn how to install **Trail Blazer** on a **PC**. Read [this article](#) to learn how to log into your database on a Mac. *You'll also want to get any new users up to speed by watching our Getting Started video playlist and taking the free [intro training class](#).*

Steps

Navigate to the **Contacts (Voters/Donors)** list under the **Application Menu**.



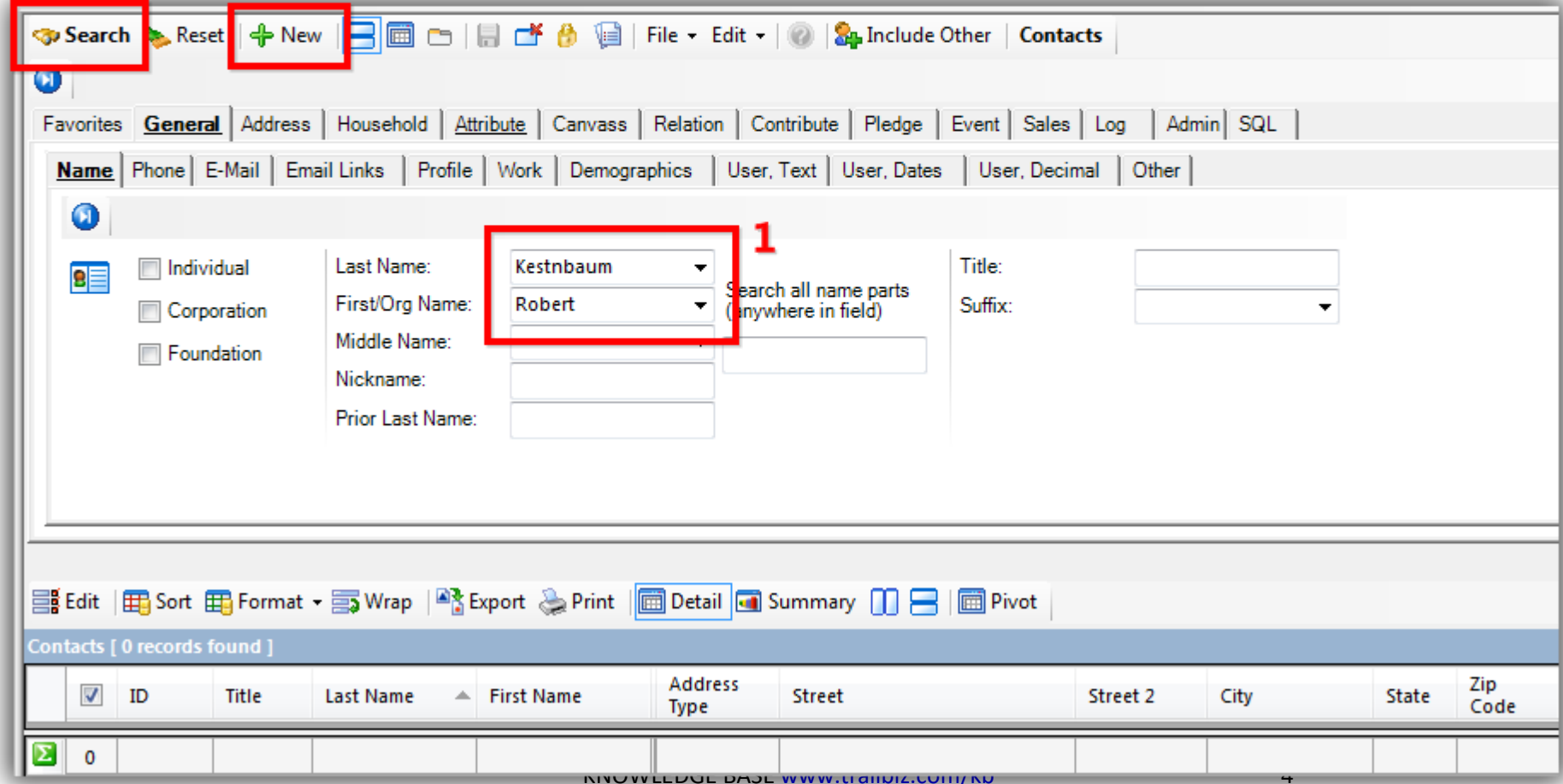
Check if the user you want to add is **already in your database** by running a [search query](#) by their **name**. **If they are, you'll click on their name to open their contact record.*

if they aren't you'll need to **add them by clicking the [+ New] button at the top. In this example the person I was setting up was 'not' in the database so I added them as a new contact record.*

Run a search by the contact's name that you want to setup as a new user.

- if their record is present, click on their name to open the record card
- if the record is missing, you'll need to click [+ New] to add them

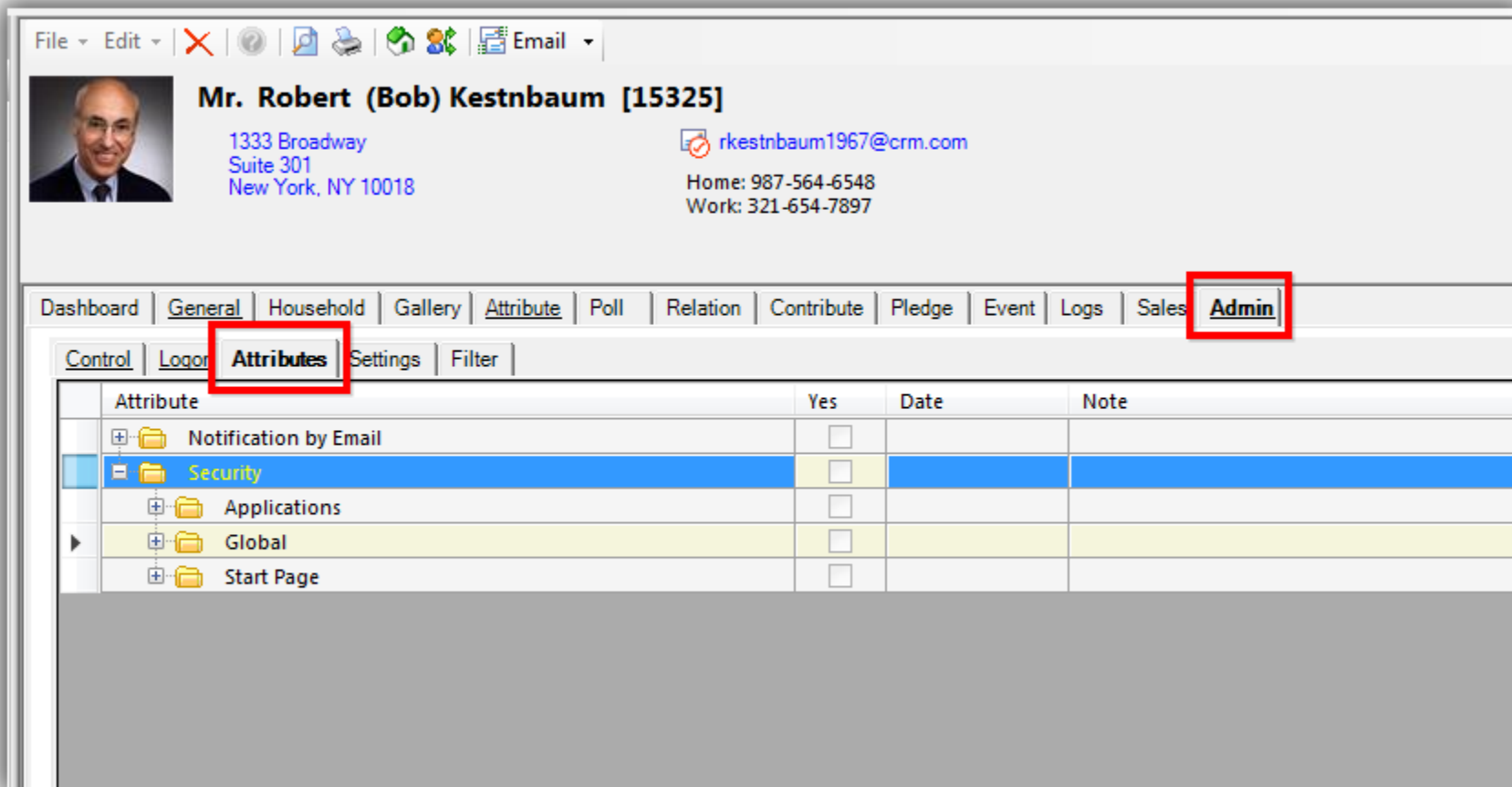
2



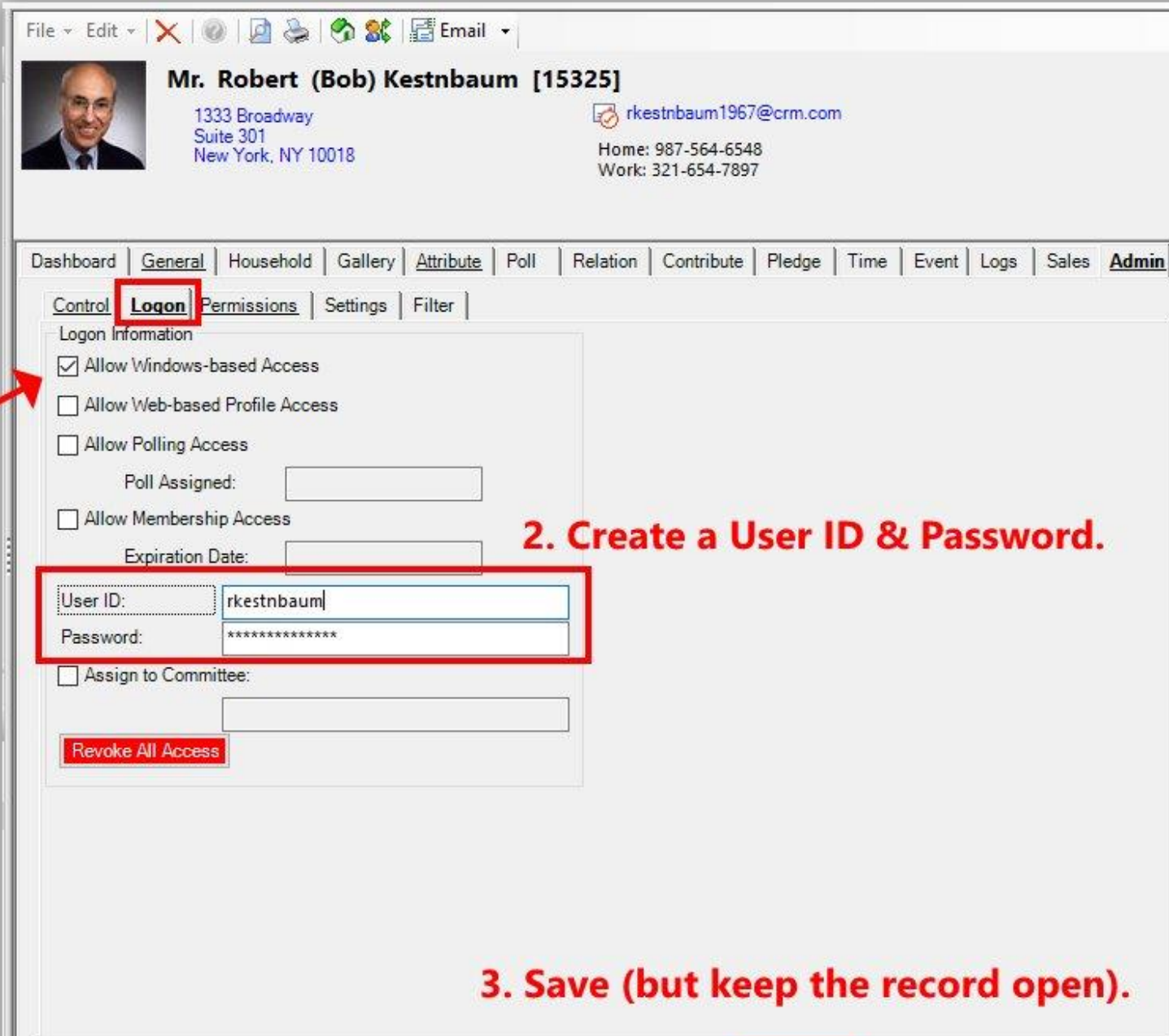
The screenshot shows the TrailBlazer software interface. At the top, there is a toolbar with buttons for Search, Reset, and New. The 'New' button is highlighted with a red box and a red '1' next to it. Below the toolbar, there are several tabs for different views: General, Address, Household, Attribute, Canvass, Relation, Contribute, Pledge, Event, Sales, Log, Admin, and SQL. The 'General' tab is selected. Underneath, there are more tabs for different fields: Name, Phone, E-Mail, Email Links, Profile, Work, Demographics, User, Text, User, Dates, User, Decimal, and Other. The 'Name' tab is selected. In the center, there is a form for adding a new contact. The 'Last Name' field is set to 'Kestnbaum' and the 'First/Org Name' field is set to 'Robert'. Both fields are highlighted with a red box and a red '1' next to it. To the left of the form, there are checkboxes for 'Individual', 'Corporation', and 'Foundation'. Below the form, there is a toolbar with buttons for Edit, Sort, Format, Wrap, Export, Print, Detail, Summary, and Pivot. At the bottom, there is a table with the following columns: ID, Title, Last Name, First Name, Address Type, Street, Street 2, City, State, and Zip Code. The table shows 0 records found.

Enter whatever **information** you have for the new user e.g. **name, address, contact info**, etc.

Navigate to the **Admin** tab > **Logon** sub-tab.



Check the box for **Allow Windows-based Access**, create a **User ID & Password**, and then click **[Save]**. *It's important to keep the record open for the next steps which is providing them security access to different areas of the application.*



The screenshot shows the TrailBlazer user management interface. At the top, there is a menu bar with 'File', 'Edit', and 'Email'. Below this is a user profile for Mr. Robert (Bob) Kestnbaum [15325], including a photo, address (1333 Broadway, Suite 301, New York, NY 10018), email (rkestnbaum1967@crm.com), and phone numbers (Home: 987-564-6548, Work: 321-654-7897). The main content area has a navigation bar with tabs: Dashboard, General, Household, Gallery, Attribute, Poll, Relation, Contribute, Pledge, Time, Event, Logs, Sales, and Admin. Below the navigation bar, there are sub-tabs: Control, Logon, Permissions, Settings, and Filter. The 'Logon' tab is selected and highlighted with a red box. A red arrow labeled '1' points to the 'Logon' tab. The 'Logon Information' section contains several checkboxes: 'Allow Windows-based Access' (checked), 'Allow Web-based Profile Access' (unchecked), 'Allow Polling Access' (unchecked), and 'Allow Membership Access' (unchecked). There are also input fields for 'Poll Assigned:' and 'Expiration Date:'. Below these are input fields for 'User ID:' (containing 'rkestnbaum') and 'Password:' (containing '*****'). A red box highlights these two input fields, with a red arrow labeled '2' pointing to them. Below the password field is an unchecked checkbox for 'Assign to Committee:' and an empty input field. At the bottom of the form is a red button labeled 'Revoke All Access'. At the bottom of the screenshot, there is a red arrow labeled '3' pointing to a 'Save' button in the bottom right corner.

2. Create a User ID & Password.

3. Save (but keep the record open).

Navigate to the **Admin > Attributes** tab (directly to the right of the **Logon** sub-tab).

Mr. Robert (Bob) Kestnbaum [15325]
1333 Broadway
Suite 301
New York, NY 10018
rkestnbaum1967@crm.com
Home: 987-564-6548
Work: 321-654-7897

Dashboard | General | Household | Gallery | Attribute | Poll | Relation | Contribute | Pledge | Time | Event | Logs | Sales | **Admin**

Control | Logon | **Permissions** | Settings | Filter

Show Hidden Show Checked Only

| Attribute | Yes | Date | Note |
|-----------------------|-------------------------------------|------|------|
| Notification by Email | <input checked="" type="checkbox"/> | | |
| Security | <input checked="" type="checkbox"/> | | |
| Applications | <input checked="" type="checkbox"/> | | |
| Global | <input checked="" type="checkbox"/> | | |
| Start Page | <input type="checkbox"/> | | |

Expand all the different folders under the **Notification by Email** branch and the **Security** branch.

Check all **boxes** that apply for the **security level(s)** you want to provide your new database user along with the [email notifications](#) you want them to receive for online occurrences. *My example is below where I created a user with access to just about every feature except for the admin rights (Security Management).*

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

Control | Logon | Permissions | Settings | Filter

Show Hidden Show Checked Only

| Attribute | Yes | Date | Note |
|------------------------------|-------------------------------------|----------|------|
| Notification by Email | <input checked="" type="checkbox"/> | | |
| Security | <input checked="" type="checkbox"/> | | |
| Applications | <input checked="" type="checkbox"/> | | |
| Calendar | <input checked="" type="checkbox"/> | | |
| Data | <input checked="" type="checkbox"/> | | |
| Allow Read Access | <input checked="" type="checkbox"/> | | |
| Allow Write Access | <input checked="" type="checkbox"/> | | |
| Time Log | <input checked="" type="checkbox"/> | | |
| Activities | <input type="checkbox"/> | | |
| Allow Approval | <input type="checkbox"/> | | |
| Data | <input checked="" type="checkbox"/> | | |
| Allow Read Access | <input checked="" type="checkbox"/> | 6/8/2018 | |
| Allow Write Access | <input type="checkbox"/> | | |
| Contact | <input checked="" type="checkbox"/> | | |
| Activities | <input checked="" type="checkbox"/> | | |
| Allow Add/Edit of Attributes | <input checked="" type="checkbox"/> | | |
| Allow Updating of Log Dates | <input checked="" type="checkbox"/> | | |
| Contribution | <input checked="" type="checkbox"/> | | |
| Data | <input checked="" type="checkbox"/> | | |
| Allow Read Access | <input checked="" type="checkbox"/> | | |
| Allow Write Access | <input checked="" type="checkbox"/> | | |
| Data | <input checked="" type="checkbox"/> | | |
| Allow Read Access | <input checked="" type="checkbox"/> | | |
| Allow Write Access | <input checked="" type="checkbox"/> | | |
| Email | <input checked="" type="checkbox"/> | | |
| Financial | <input type="checkbox"/> | | |
| Polling | <input type="checkbox"/> | | |
| Security Management | <input type="checkbox"/> | | |
| System Gallery | <input type="checkbox"/> | | |
| Text | <input type="checkbox"/> | | |
| Global | <input checked="" type="checkbox"/> | | |
| Activities | <input checked="" type="checkbox"/> | | |
| Allow Data Export | <input checked="" type="checkbox"/> | | |
| Allow Data Import | <input checked="" type="checkbox"/> | | |
| Allow Mass Updates | <input checked="" type="checkbox"/> | | |

Click **[Save and Close]** in the bottom-right of the screen when you're finished.

You can search for all database users with access by navigating to the **Admin > Logon** tab, check the box for **Allow Windows-based access** and click **[Search]**. *In my example there were two.*


2 Running a search for all current database users under the Admin > Logon tab.

The screenshot shows the TrailBlazer interface. At the top, the 'Search' button is highlighted with a red box. Below it, the 'Admin' tab is selected, and the 'Logon' sub-tab is active, also highlighted with a red box. A red arrow labeled '1' points to the 'Logon' sub-tab. The 'Logon' section contains several checkboxes: 'Allow Windows-based access' (checked), 'Allow Web-based Profile Access' (unchecked), 'Allow Polling access' (unchecked), and 'Allow Membership access' (unchecked). There are also input fields for 'User ID' and 'Contact ID'. Below this, a table displays search results for 'Contacts' with 2 records found. The table has columns for ID, Title, Last Name, First Name, Address Type, Street, Street 2, City, State, Zip Code, Home Phone, and Bus Phone. The first record is for Robert Kestnbaum (ID 15325) and the second is for Joel Kristenson (ID 12796). At the bottom, the status bar shows 'Logon = Joel Kristenson' and buttons for 'Save', 'Save and Close', 'Reports', 'New', and 'Cancel'.

results

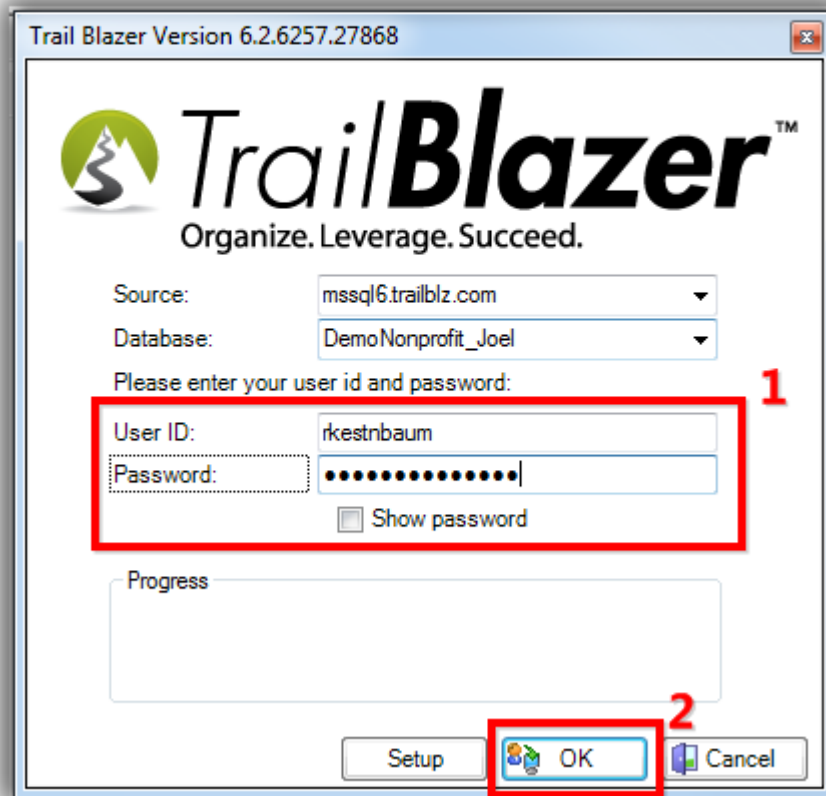
| ID | Title | Last Name | First Name | Address Type | Street | Street 2 | City | State | Zip Code | Home Phone | Bus Phone |
|-------|-------|------------|------------|--------------|-----------------------|-----------|---------------|-------|----------|----------------|----------------|
| 15325 | Mr. | Kestnbaum | Robert | Work | 1333 Broadway | Suite 301 | New York | NY | 10018 | (987) 564-6548 | (321) 654-7897 |
| 12796 | Senor | Kristenson | Joel | Home | 9110 Golden Valley Rd | Apt 10 | Golden Valley | MN | 55427 | (843) 442-1919 | (866) 909-8700 |

Logon = Joel Kristenson

 **Tip: Test logging** into your database with the **user's credentials** to make sure they are **setup correctly** with appropriate access to the different tools they will need, but **not more** access than is necessary. *My example is shown in the two screenshots below.*

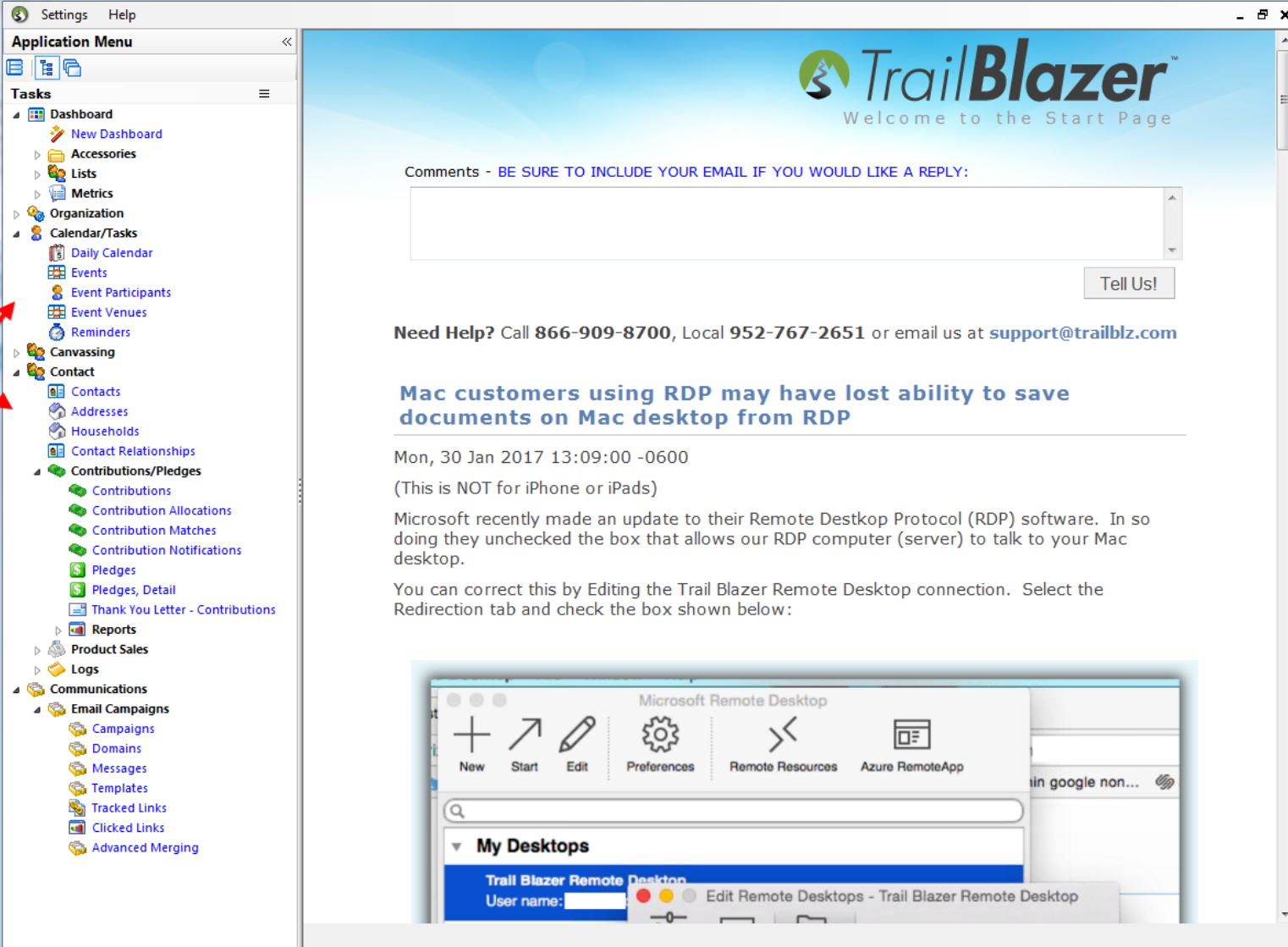
Img 1 of 2 – Log into the Database with the New User's Credentials

Test logging into your database with the new user's credentials.



Img 2 of 2 – Verify the **Application Menu** for Appropriate Security Levels

Verify the user has access to what they need under the Application Menu, but not more than is necessary.



The screenshot shows the TrailBlazer application interface. On the left is the 'Application Menu' with a tree view of tasks. On the right is the main content area displaying a 'Welcome to the Start Page' with a 'Tell Us!' button and a help section titled 'Mac customers using RDP may have lost ability to save documents on Mac desktop from RDP'.

Application Menu

- Tasks
 - Dashboard
 - New Dashboard
 - Accessories
 - Lists
 - Metrics
 - Organization
 - Calendar/Tasks
 - Daily Calendar
 - Events
 - Event Participants
 - Event Venues
 - Reminders
 - Canvassing
 - Contact
 - Contacts
 - Addresses
 - Households
 - Contact Relationships
 - Contributions/Pledges
 - Contributions
 - Contribution Allocations
 - Contribution Matches
 - Contribution Notifications
 - Pledges
 - Pledges, Detail
 - Thank You Letter - Contributions
 - Reports
 - Product Sales
 - Logs
 - Communications
 - Email Campaigns
 - Campaigns
 - Domains
 - Messages
 - Templates
 - Tracked Links
 - Clicked Links
 - Advanced Merging

TrailBlazer™
Welcome to the Start Page

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

Tell Us!

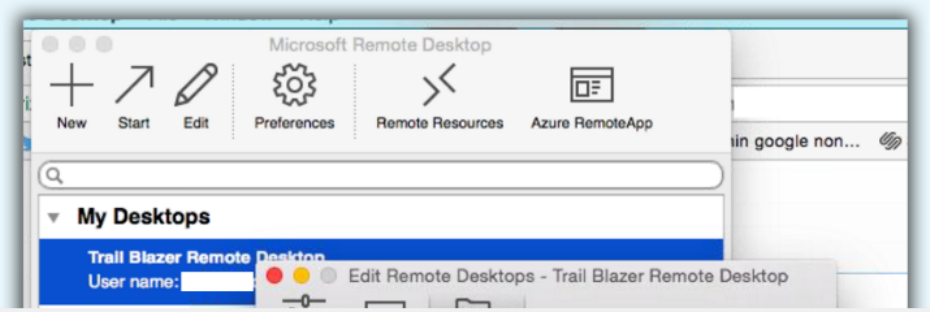
Need Help? Call 866-909-8700, Local 952-767-2651 or email us at support@trailblz.com

Mac customers using RDP may have lost ability to save documents on Mac desktop from RDP

Mon, 30 Jan 2017 13:09:00 -0600
(This is NOT for iPhone or iPads)

Microsoft recently made an update to their Remote Desktop Protocol (RDP) software. In so doing they unchecked the box that allows our RDP computer (server) to talk to your Mac desktop.

You can correct this by Editing the Trail Blazer Remote Desktop connection. Select the Redirection tab and check the box shown below:



Microsoft Remote Desktop

New Start Edit Preferences Remote Resources Azure RemoteApp

My Desktops

Trail Blazer Remote Desktop
User name: [input field] Edit Remote Desktops - Trail Blazer Remote Desktop

Once you're satisfied with the setup you can **distribute the credentials** to the user, links to **download** on a [PC](#) or [Mac](#), and the link to the **required intro training* class. You'll also need to provide them your **Database Name** which you can find by clicking the **[Setup]** button on the login screen.

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



Trail Blazer™

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

Related Resources

Article: [How to Download & Install Trail Blazer on a PC, and How to Uninstall-Reinstall the Application if it Doesn't Launch Correctly after a Recent Deployment](#)

Article: [Configure Microsoft Remote Desktop – For Mac Users \(*Logging into Trail Blazer on your Mac*\)](#)

Article: [Filter Database Access for Different Users by things like Address, a Saved Search Query, and a Specific Attribute Item](#)

Article: [How to Restrict a Database User's View of a 'Voter/Donor Record' by Filtering their Login Access using the 'Limit view of Voter' Setting](#)

Article: [Email Notification of Web Occurrences](#)

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

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

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

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

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

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

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

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

Video Playlist: [Getting Started with Trail Blazer](#)

Website: [Free Intro Training \(*required before accessing live support and future training\)](#)

Trail Blazer Live Support

📞 **Phone:** 1-866-909-8700

✉️ **Email:** 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.*