

# Importing Voters/Donors Into Trail Blazer

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## Preface

Importing information from a list is something that is more of an art form than a science. It's the square peg round hole issue. How to make your data 'fit' into Trail Blazer? It's very easy when you are just importing name, address, phone numbers, and email.

It gets a bit trickier when the address is split among house number, street pre-direction, street name, and street post-direction columns. Trail Blazer will handle that nicely, but you have to map the fields very carefully.

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## DO NOT's

Before we get into the actual importing of data, let's discuss the do not's of the format of the file you wish to import.

We'll work with an Excel file as that's the most common of the imports. The process is the same regardless of the import file type, only the pictures would change.

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## Names

**Incorrect:** the name is not stored consistently within the Name column

~~|   | A                     |
|---|-----------------------|
| 1 | Name                  |
| 2 | John Smith            |
| 3 | Adams, Mary           |
| 4 | Wright, Frank Lloyd   |
| 5 | John Wilkes Booth III |
| 6 | Dr. J. Abrahamson Sr. |
| 7 |                       |~~

**Correct:** each part of the name is in a separate column

Title	Firstname	Middle	Lastname	Suffix
	John		Smith	
	Mary		Adams	
	Frank	Lloyd	Wright	
	John	Wilkes	Booth	III
Dr.	J.		Abrahamson	Sr.

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## Addresses

**Incorrect:** the entire address is in a single cell in Excel

A
<b>Address</b>
123 East Main Steet Apt 201, Anywhere, MN 55555
456 East Main Steet, Anywhere, MN 55555-4041

This one is incorrect because it uses 2 rows for the address within a single cell in Excel.

<b>Address</b>
123 East Main Steet Apt 201
Anywhere, MN 55555

**Correct:** address parts are in their own columns.

↓ D	E	F	G	H	I	J
street	street2	street3	city	state	zip	zip4
123 East Main Street	Apt 201		Anywhere	MN	55555	
456 East Main Street			Anywhere	MN	55555-4041	
		OR				
456 East Main Street			Anywhere	MN	55555	4041

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## Phones

**Incorrect:** combining more than one phone in a single column will not import. Adding additional comments to the phone number also will not work.

A
<b>Phone</b>
(555)555-1234 (c) or (555)555-4567 (h)
(555)123-4567 don't call after 8 pm

**Correct:** each type of phone has its own column. Comments can be imported (up to 50 characters) into the phone extension fields.

C	D	E	F
<b>Homephone</b>	<b>homephoneext</b>	<b>busphone</b>	<b>cellphone</b>
(555)555-4567			(555)555-1234
(555)123-4567	don't call after 8 pm		

**Note:** Trail Blazer will strip out any characters that are not digits (0-9) when importing a phone number.

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## Other Do Not's:

Zip Codes - ensure they don't exceed 10 characters (generally a typo).

Email addresses – require an @ symbol and a . (period) for the address to be valid. We see some file where a web site address is stored in the email column.

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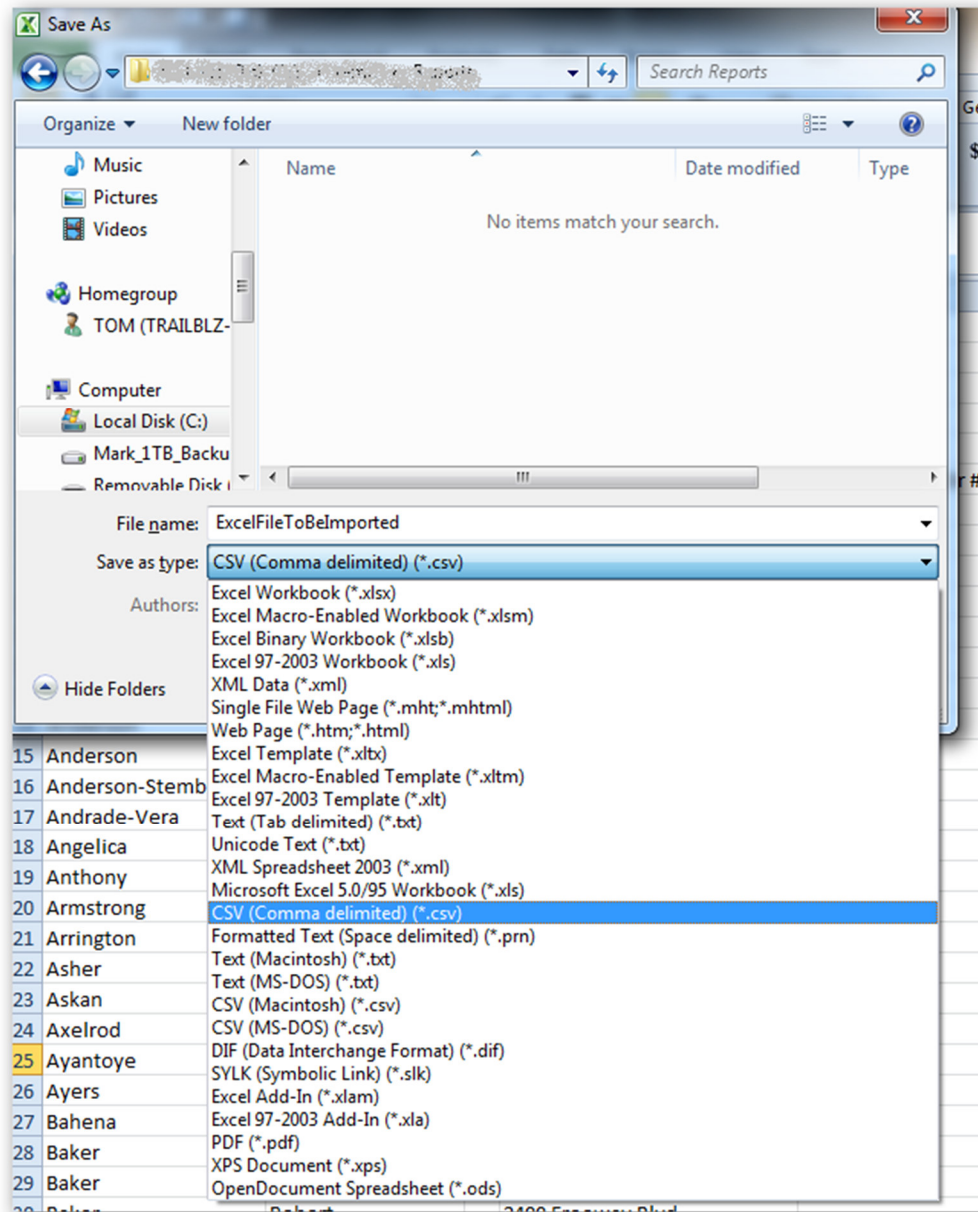
## Importing an Excel Spreadsheet

For this example we will import the following data:

A	B	C	D	E	F	G	H	I	J	K
Last Name	First Name	MI	Address	Address2	City	State	Zip Code	Gender	County	homephone
Adams	Dwight	A	7325 Pontiac Cir		Chanhassen	MN	55317	M		612-123-1111
Adams	Larry		220 South Sixth Street	Suite 300	Minneapolis	MN	55402-4505	M	Hennepin	612-123-1112
Adrian	Betsy		1650 W 82nd St Ste 600		Bloomington	MN	55431	F		612-123-1113
Albrecht	Jewel		6716 Polaris Ln N		Maple Grove	MN	55311	F		612-123-1114
Aldridge	Beth	D	River of Goods	2915 Commers Dr #1500	Eagan	MN	55121	F		612-123-1115
Aleshire	Jill		1400 Riverwood Dr		Burnsville	MN	55337	F		612-123-1116
Alexander	Peter		4639 Wentworth		Minneapolis	MN	55419	M	Hennepin	612-123-1117
Allin	Kent		1605 Northrop Ln		Minneapolis	MN	55403-1000	M	Hennepin	612-123-1118
Alvarado	Gloria	F	Wabasha Site 12-9-02					F		612-123-1119
Anderson	Agnes		2700 Park Ave	Apt 1402	Minneapolis	MN	55407	F	Hennepin	612-123-1120
Anderson	Elizabeth		2267 Buffalo St		White Bear Township	MN	55110	F		612-123-1121
Anderson	Joslin		31 Skyline Drive		Mankato	MN	56001			612-123-1122
Anderson	Lavonne		12837 Echo Ln		Apple Valley	MN	55124	F		612-123-1123
Anderson	Lon		1750 Northway Drive		Mankato	MN	56001	M		612-123-1124
Anderson-Stembridge	Kirsten		2485 Como Ave		St Paul	MN	55108	F		612-123-1125
Andrade-Vera	Maria		3215 19th Ave S		Minneapolis	MN	55407	F	Hennepin	612-123-1126
Angelica	Emil		5008 Morgan Ave S		Minneapolis	MN	55419	M	Hennepin	612-123-1127
Anthony	Holly		435 Lilac Lane		Madison Lake	MN	56063	F		612-123-1128

Trail Blazer requires the Excel file first be saved as a CSV file.

# Importing Voters/Donors Into Trail Blazer





# Importing Voters/Donors Into Trail Blazer

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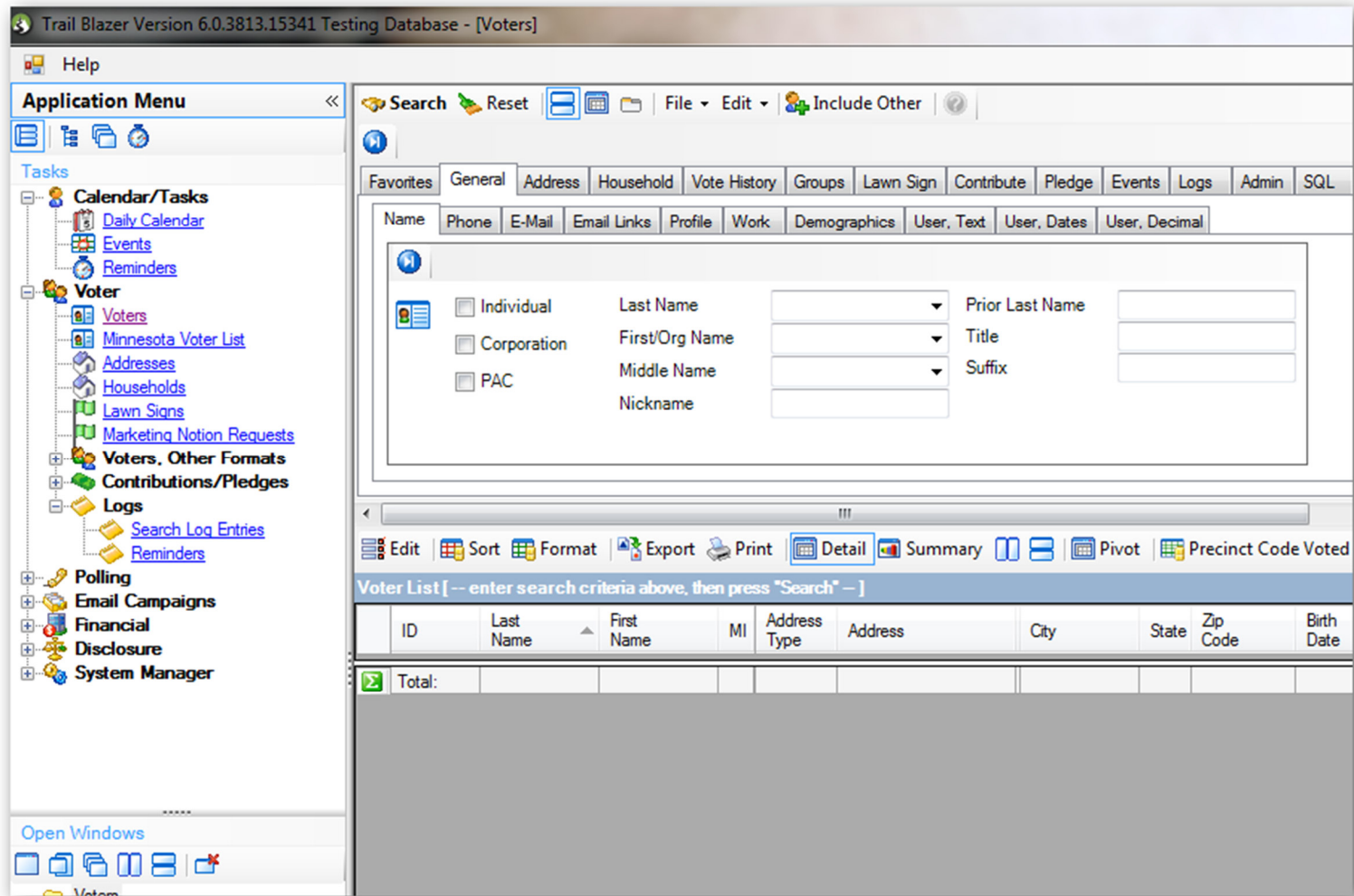
I named the file *ExcelFileToBeImported.csv*.

**BE SURE TO CLOSE THE FILE BEFORE ATTEMPTING TO IMPORT TO TRAIL BLAZER!**

Login into Trail Blazer if you not already done so.

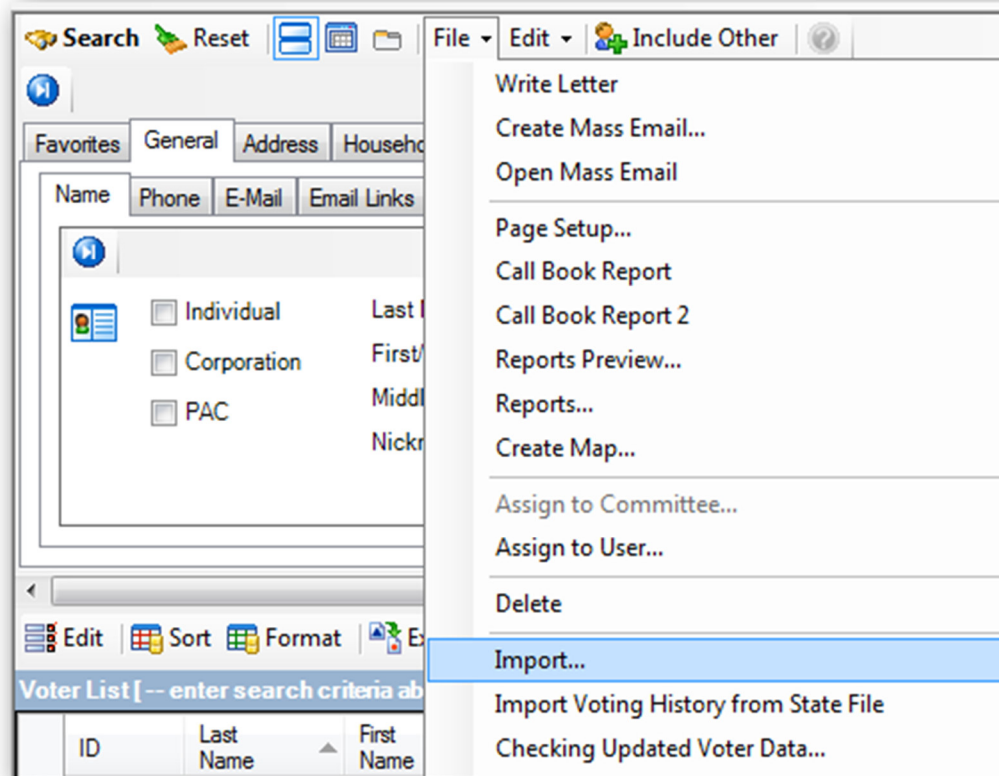
# Importing Voters/Donors Into Trail Blazer

Open a Voter/Donor search panel. Your screen should look similar to this:



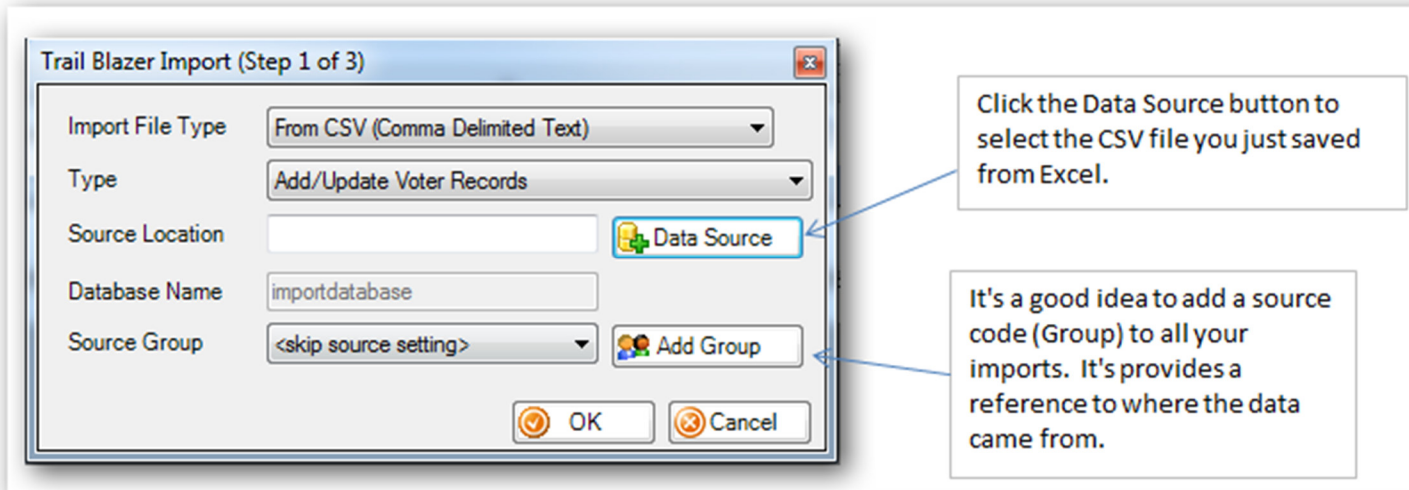
# Importing Voters/Donors Into Trail Blazer

From the File drop down menu, select Import.



# Importing Voters/Donors Into Trail Blazer

The following screen may have different values from what you see, but in general it will look like this:



The screenshot shows the 'Trail Blazer Import (Step 1 of 3)' dialog box. It contains the following fields and buttons:

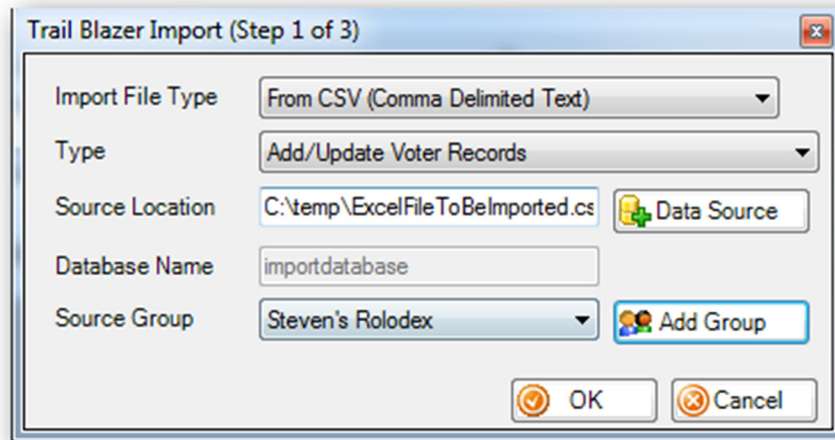
- Import File Type:** A dropdown menu set to 'From CSV (Comma Delimited Text)'.
- Type:** A dropdown menu set to 'Add/Update Voter Records'.
- Source Location:** An empty text input field.
- Database Name:** A text input field containing 'importdatabase'.
- Source Group:** A dropdown menu set to '<skip source setting>'.
- Data Source button:** A button with a green plus icon and the text 'Data Source'.
- Add Group button:** A button with a group of people icon and the text 'Add Group'.
- OK button:** A button with a checkmark icon and the text 'OK'.
- Cancel button:** A button with an 'X' icon and the text 'Cancel'.

Two blue arrows point from text boxes to the 'Data Source' and 'Add Group' buttons:

- The first arrow points to the 'Data Source' button with the text: 'Click the Data Source button to select the CSV file you just saved from Excel.'
- The second arrow points to the 'Add Group' button with the text: 'It's a good idea to add a source code (Group) to all your imports. It's provides a reference to where the data came from.'

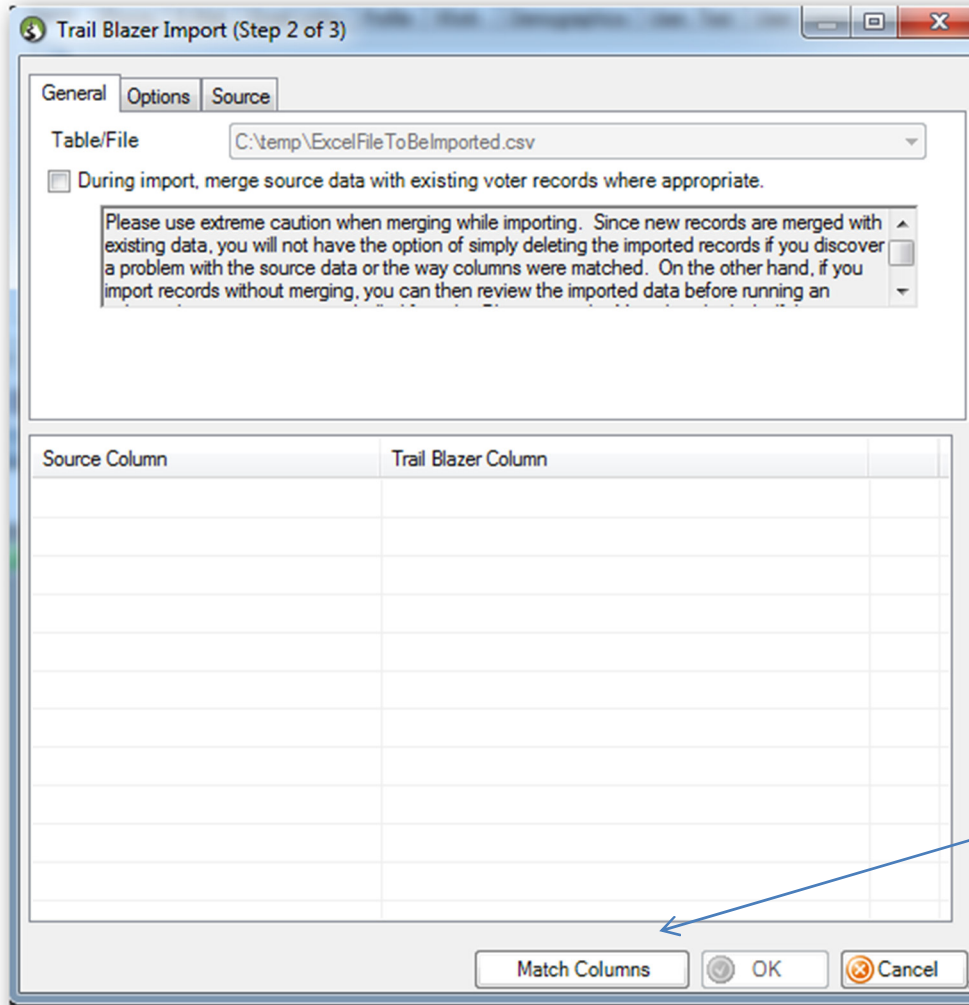
# Importing Voters/Donors Into Trail Blazer

Once completed it will look something like this:



# Importing Voters/Donors Into Trail Blazer

Click **Ok** to move to step 2



The dialog box is titled "Trail Blazer Import (Step 2 of 3)". It has three tabs: "General", "Options", and "Source". The "General" tab is selected. It contains a "Table/File" dropdown menu with the path "C:\temp\ExcelFileToBeImported.csv". Below this is a checkbox labeled "During import, merge source data with existing voter records where appropriate." which is unchecked. A text box below the checkbox contains a warning: "Please use extreme caution when merging while importing. Since new records are merged with existing data, you will not have the option of simply deleting the imported records if you discover a problem with the source data or the way columns were matched. On the other hand, if you import records without merging, you can then review the imported data before running an". Below the text box is a table with two columns: "Source Column" and "Trail Blazer Column". The table is empty. At the bottom of the dialog are three buttons: "Match Columns", "OK", and "Cancel".

Source Column	Trail Blazer Column
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Click the **Match Columns** button to bring in the column headings from the CSV file.

# Importing Voters/Donors Into Trail Blazer

In our case MOST of the columns mapped automatically.

Trail Blazer Import (Step 2 of 3)

General Options Source

Table/File: C:\temp\ExcelFileToBeImported.csv

☐ During import, merge source data with existing voter records where appropriate.

Please use extreme caution when merging while importing. Since new records are merged with existing data, you will not have the option of simply deleting the imported records if you discover a problem with the source data or the way columns were matched. On the other hand, if you import records without merging, you can then review the imported data before running an

Source Column	Trail Blazer Column
Last Name	LastName
First Name	FirstName
MI	Do not Import
Address	Addr1 Address
Address2	Addr1 Address2
City	Addr1 City
State	Addr1 State
Zip Code	Addr1 ZipCode
Gender	Sex
County	Addr1 County
homephone	HomePhone

Match Columns OK Cancel

MI did not map automatically to the Middle Name column. You can do that manually by clicking the drop down arrow and selecting Middle Name

# Importing Voters/Donors Into Trail Blazer

Trail Blazer Import (Step 2 of 3)

General Options Source

Table/File: C:\temp\ExcelFileToBeImported.csv

☐ During import, merge source data with existing voter records where appropriate.

Please use extreme caution when merging while importing. Since new records are merged with existing data, you will not have the option of simply deleting the imported records if you discover a problem with the source data or the way columns were matched. On the other hand, if you import records without merging, you can then review the imported data before running an

Source Column	Trail Blazer Column
Last Name	LastName
First Name	FirstName
MI	MiddleName
Address	Addr1 Address
Address2	Addr1 Address2
City	Addr1 City
State	Addr1 State
Zip Code	Addr1 ZipCode
Gender	Sex
County	Addr1 County
homephone	HomePhone

Match Columns OK Cancel

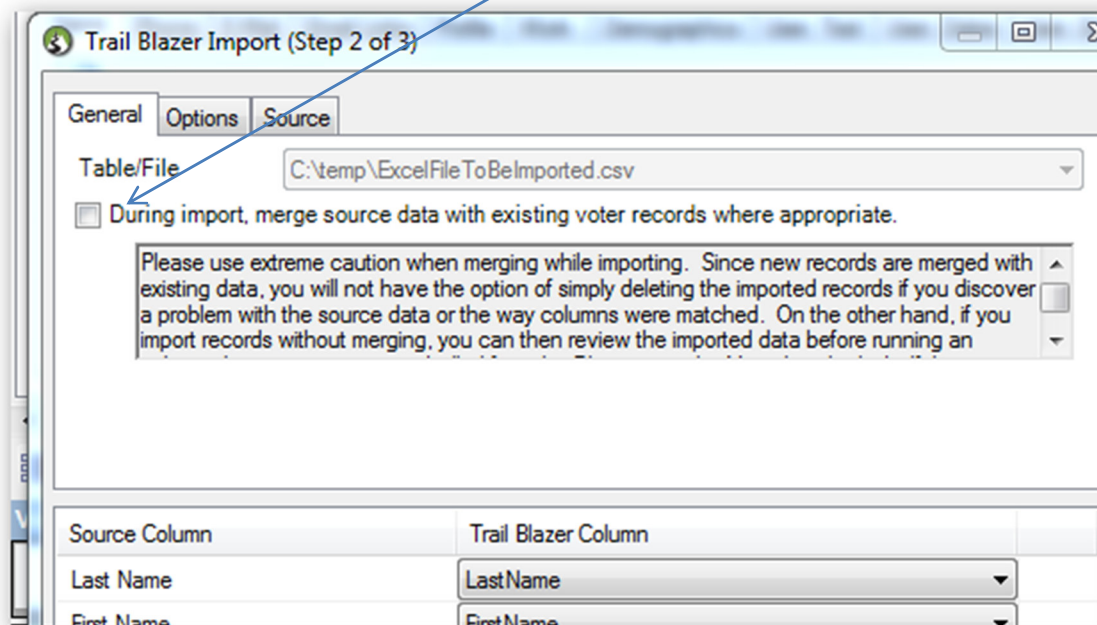
You may import 2 sets of addresses in a single import (home and mailing are typical). The 1<sup>st</sup> block of addresses are mapped to Addr 1... and the 2<sup>nd</sup> block of addresses are mapped to Addr 2...



# Importing Voters/Donors Into Trail Blazer

If you already have data in your database, you MAY want to have the import tool merge the new data with existing data where it can. Trail Blazer will attempt to match records on Name and Address. For that to occur, the name and address must be PRECISELY the same.

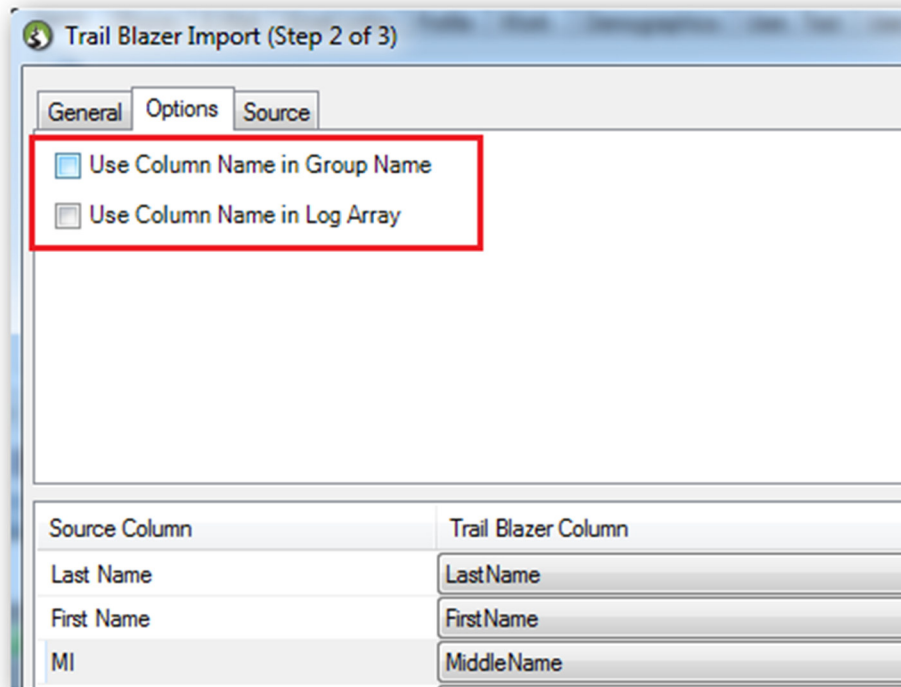
If you choose to merge with existing data you must set the check box:



If the box is NOT checked, all records being imported will be ADDED to your database.

# Importing Voters/Donors Into Trail Blazer

If you are importing columns that will be mapped to our group attributes or log notes, then you may want to check these boxes:

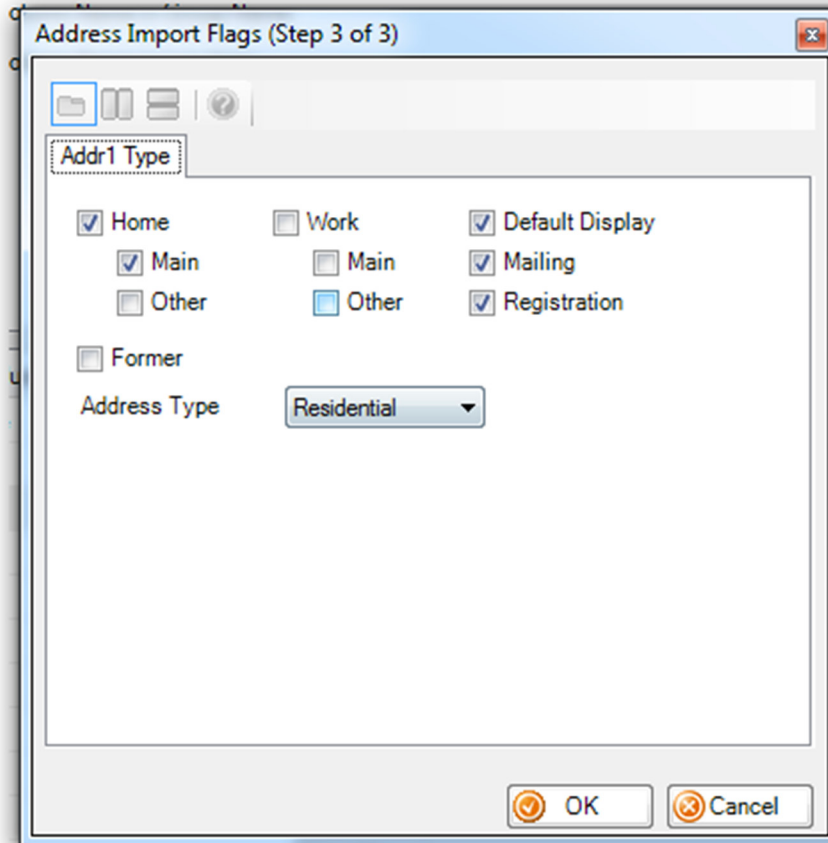


Source Column	Trail Blazer Column
Last Name	LastName
First Name	FirstName
MI	MiddleName

Click OK to move to step 3.

# Importing Voters/Donors Into Trail Blazer

Here you are identifying the type of address you are importing. Is it a home address? A work address? Should the address be considered the Default Display address? The Mailing address? Most of the time the application has already made the correct selection here and you can just click OK.

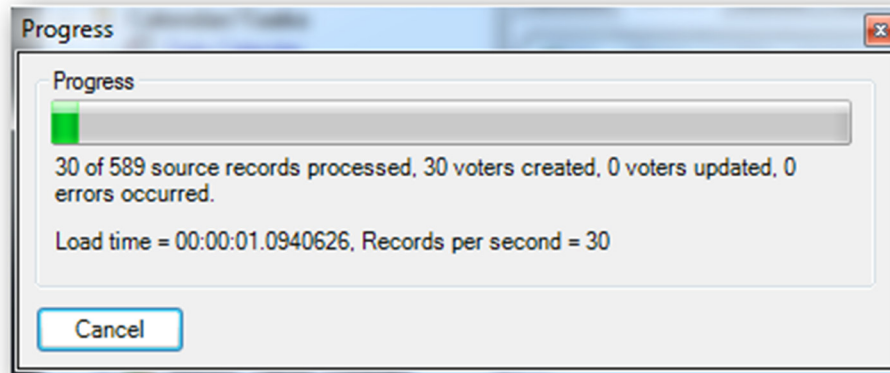


The dialog box is titled "Address Import Flags (Step 3 of 3)". It contains a section labeled "Addr1 Type" with several checkboxes and a dropdown menu. The checkboxes are arranged in three columns: "Home" (checked), "Main" (checked), "Other" (unchecked), "Former" (unchecked), "Work" (unchecked), "Main" (unchecked), "Other" (checked), and "Default Display" (checked), "Mailing" (checked), "Registration" (checked). Below these is a label "Address Type" followed by a dropdown menu showing "Residential". At the bottom right are "OK" and "Cancel" buttons.

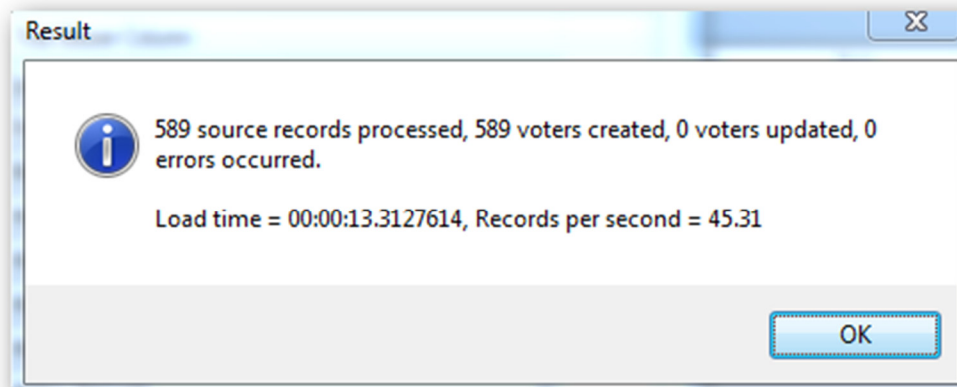
Field	Value
Home	<input checked="" type="checkbox"/>
Main	<input checked="" type="checkbox"/>
Other	<input type="checkbox"/>
Former	<input type="checkbox"/>
Work	<input type="checkbox"/>
Main	<input type="checkbox"/>
Other	<input checked="" type="checkbox"/>
Default Display	<input checked="" type="checkbox"/>
Mailing	<input checked="" type="checkbox"/>
Registration	<input checked="" type="checkbox"/>
Address Type	Residential

# Importing Voters/Donors Into Trail Blazer

During the import you will see the following progress meter:



Once the import is complete you will see the following results dialog:



# Importing Voters/Donors Into Trail Blazer

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It's important to note whether your results were as expected. In other words, if you were merging with existing data, there should be records that were updated.