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## Overview

This article will walk you through the steps to create an **attribute folder** and **attribute items** within that folder.

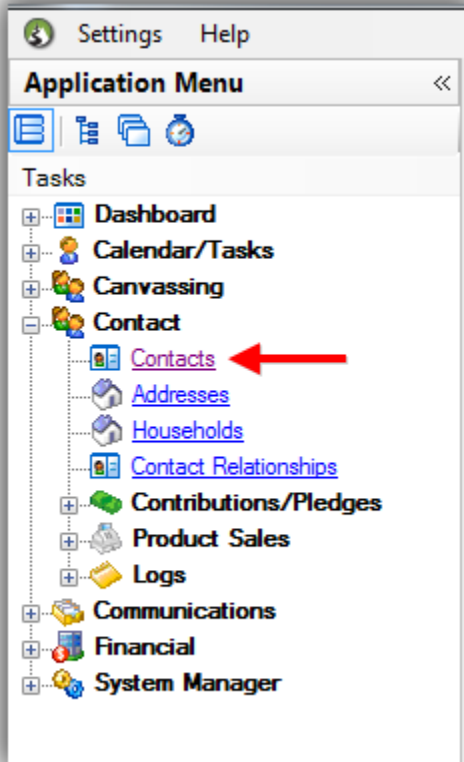
This is one of the most heavily used parts of the application for both political and nonprofit organizations. Here are just a few ways you can utilize the tool to categorize records in your **Trail Blazer** database:

- Track who's received direct mail campaigns i.e. year-end tax receipts, pledge drives, event invites, Christmas cards, etc.
- Track which way a voter is going to vote (supports, doesn't support, undecided) AND what topics they're most concerned with (the economy, infrastructure, global warming, war, education...)
- Create sub-categories for any type of contact you want to track i.e. church, hospital, school, association, pastor, client, volunteer, etc.
- Create categorize for you newsletter lists (monthly e-newsletter, yearly direct mail newsletter, quarterly e-newsletter)

 **Tip:** The **Not** folder and **Source** come standard with each **Trail Blazer** database. If you assign a record to any **attribute item** within the **Not** folder i.e. "Do Not Contact", these records will not appear in any of your standard queries. It effectively 'hides' the voter/donor record.

## Steps

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



Click on the **Attribute** tab, and then click the **[Magnify]** button to enlarge the screen.

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2. Click this button to enlarge the current screen (in this case, the Attribute tree).

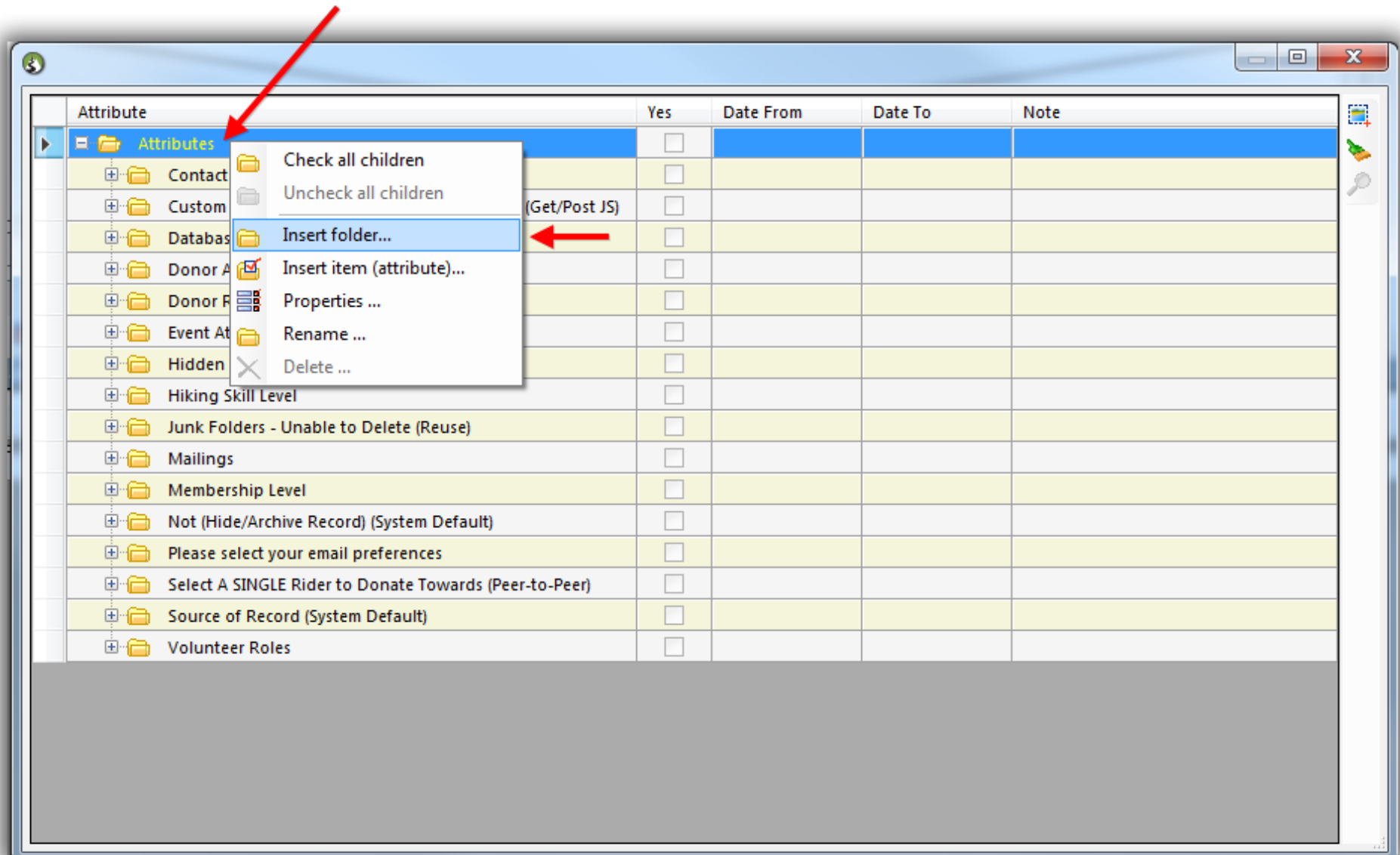
Expand this list into a larger pop-up form

Attribute	Yes	Date From	Date To	Note
Attributes	<input type="checkbox"/>			
Contact Type	<input type="checkbox"/>			
Custom Form Check Boxes and Radio Buttons (Get/Post JS)	<input type="checkbox"/>			
Database Cleanup	<input type="checkbox"/>			
Donor Assigned Solicitor (Board Member)	<input type="checkbox"/>			

Incl	ID	Title	Last Name	First Name	MI	Address Type	Address	City	State	Zip Code	Home Phone	Bus Phone	Cell Phone	Email	Employer/Company Name
0															

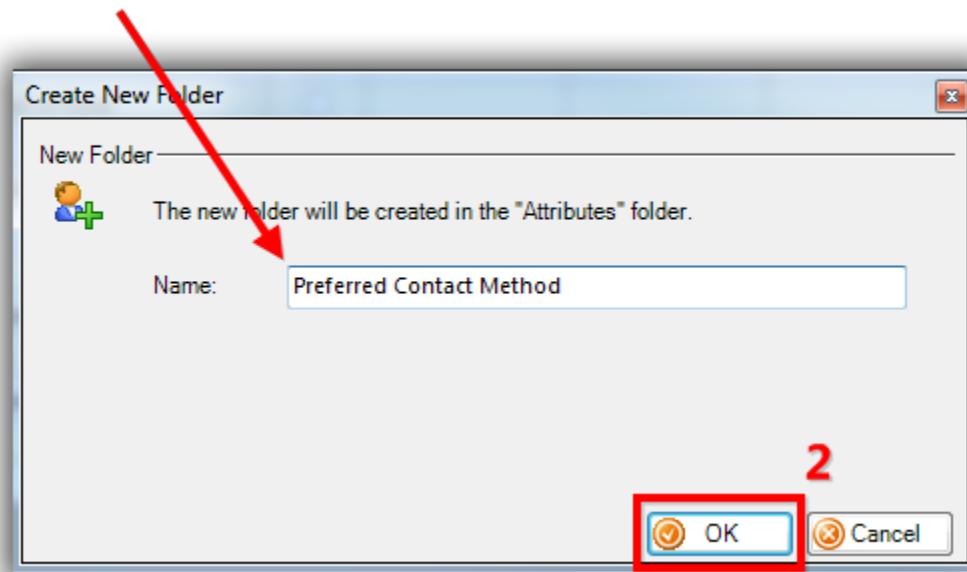
To begin creating a new **Attribute Folder** right-click on top-most folder called “**Attributes**” and select **Insert folder...** (If you’re working on a Mac and don’t have a mouse, you’ll need to click two-fingers on the d-pad in order to pull up the right-click context menu.)

**Right-click anywhere on the blue highlighted row to pull up the context menu.**

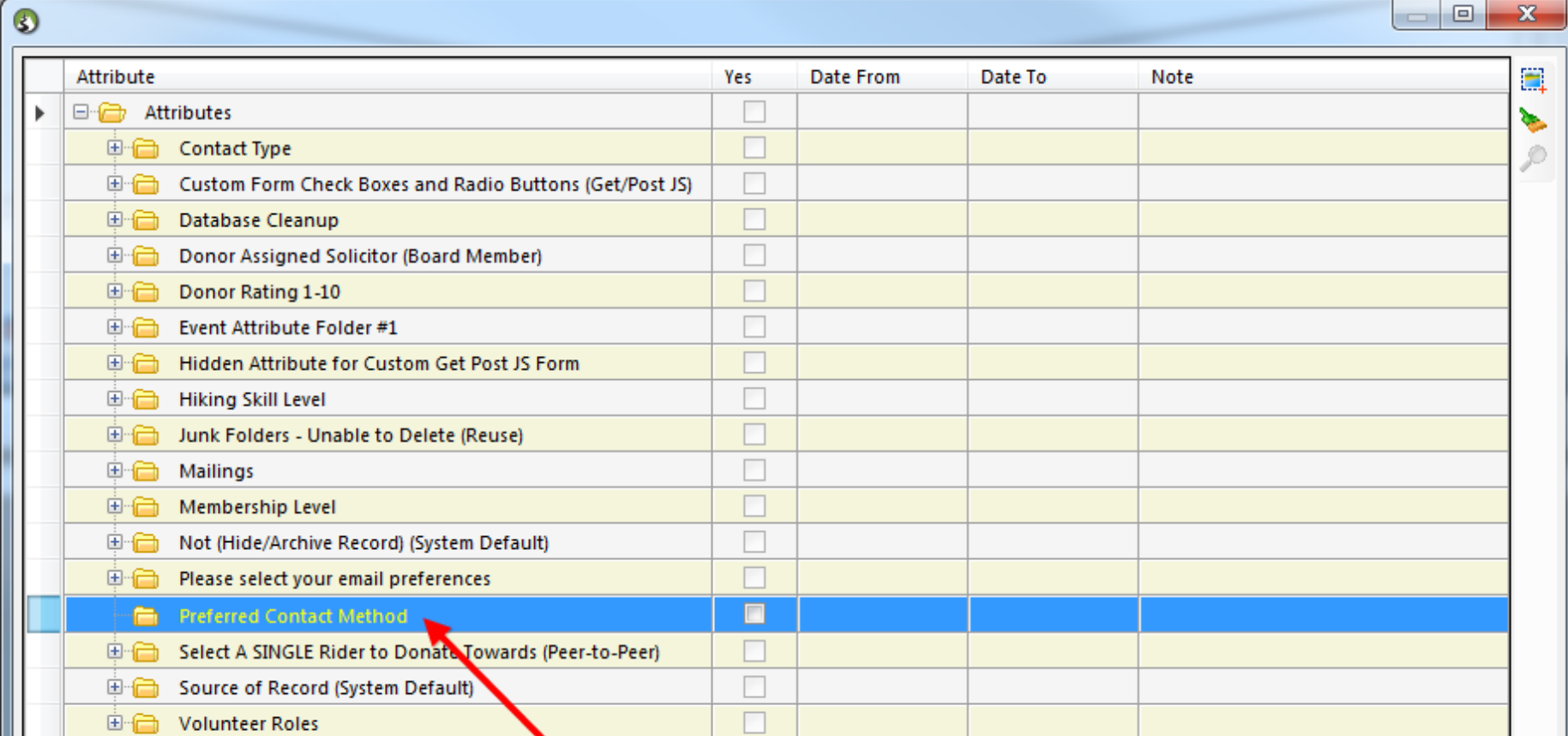


Give the folder a **name**, in this example I called mine “**Preferred Contact Method**”, then click **[OK]**.

## 1. Create a name for the folder.



The image below displays my new **folder** nested in the **Attribute Tree**. *These changes will affect all other database users in real-time.*

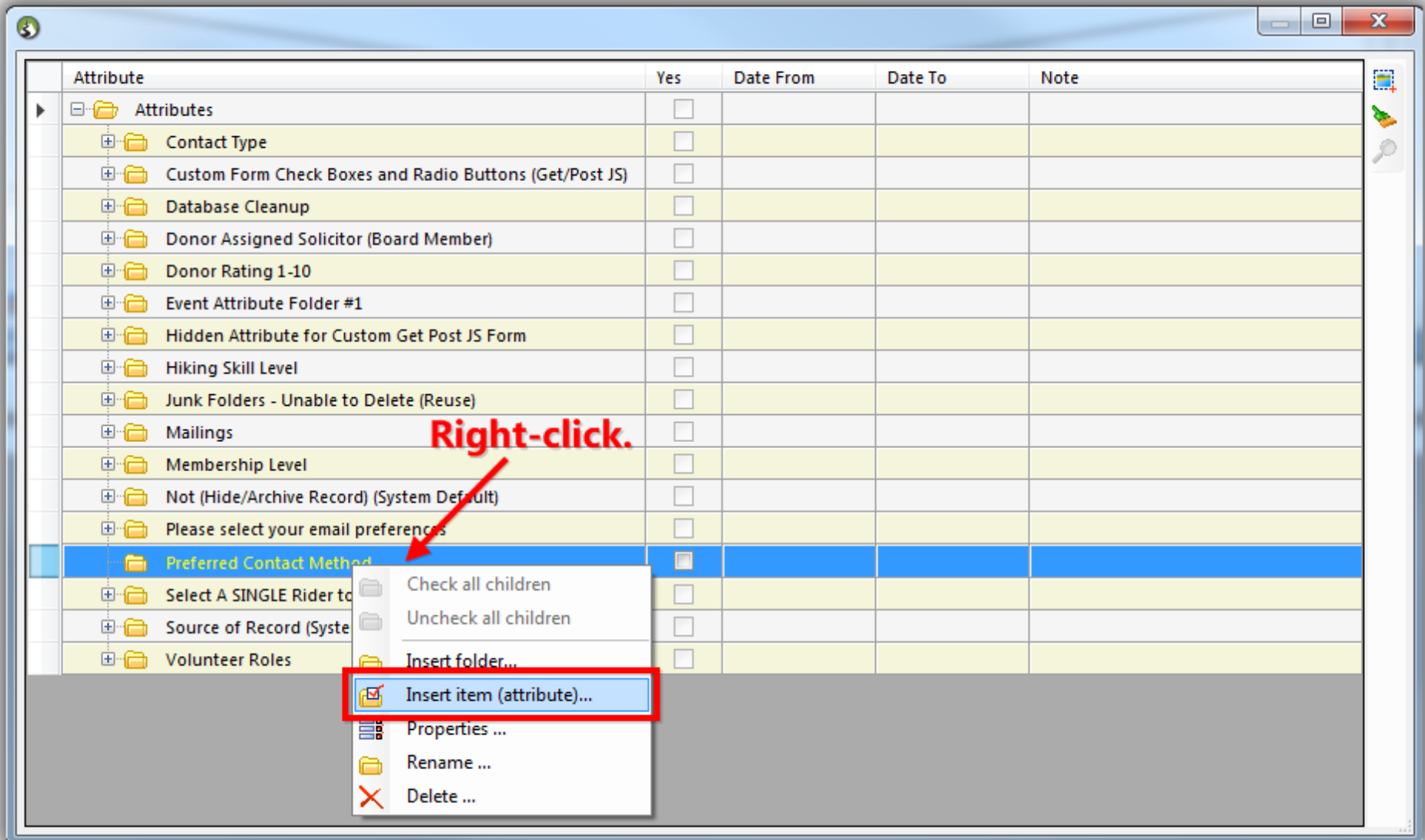



Attribute	Yes	Date From	Date To	Note
Attributes	<input type="checkbox"/>			
Contact Type	<input type="checkbox"/>			
Custom Form Check Boxes and Radio Buttons (Get/Post JS)	<input type="checkbox"/>			
Database Cleanup	<input type="checkbox"/>			
Donor Assigned Solicitor (Board Member)	<input type="checkbox"/>			
Donor Rating 1-10	<input type="checkbox"/>			
Event Attribute Folder #1	<input type="checkbox"/>			
Hidden Attribute for Custom Get Post JS Form	<input type="checkbox"/>			
Hiking Skill Level	<input type="checkbox"/>			
Junk Folders - Unable to Delete (Reuse)	<input type="checkbox"/>			
Mailings	<input type="checkbox"/>			
Membership Level	<input type="checkbox"/>			
Not (Hide/Archive Record) (System Default)	<input type="checkbox"/>			
Please select your email preferences	<input type="checkbox"/>			
<b>Preferred Contact Method</b>	<input type="checkbox"/>			
Select A SINGLE Rider to Donate Towards (Peer-to-Peer)	<input type="checkbox"/>			
Source of Record (System Default)	<input type="checkbox"/>			
Volunteer Roles	<input type="checkbox"/>			

**New folder after it's been saved. (Folders & items will sort a-z by default).**

Right-click on the new **folder** you created, and select **Insert Item (attribute)**...

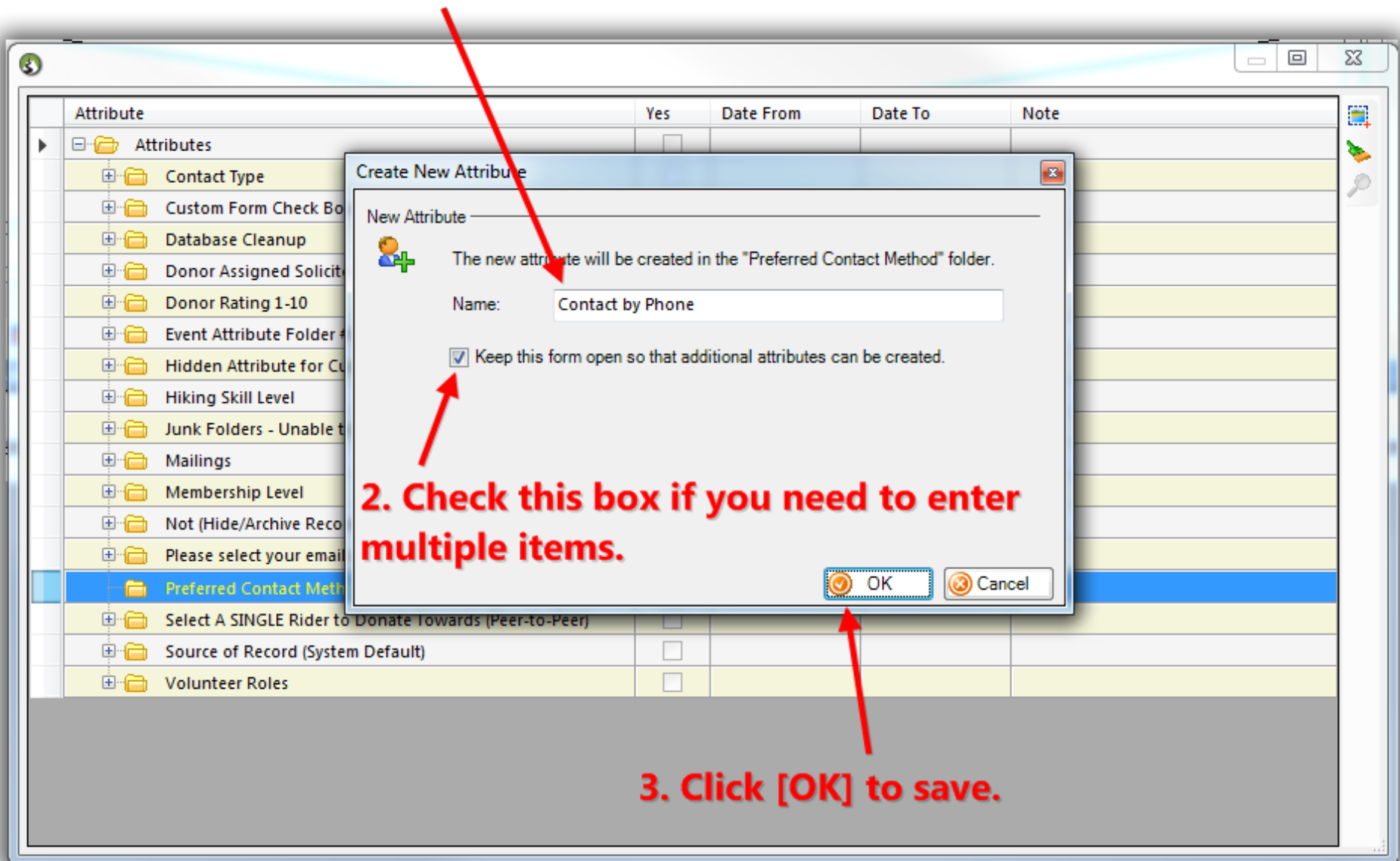




 **Tip:** If you want to add **multiple items** without the form closing, check the box that says “**Keep this form open so that additional attributes can be created.**”

Give the **attribute item(s)** a **name**, and click **[OK]** to save. *In my example I created multiple items related to contact preferences.*

**1. Create a name.**

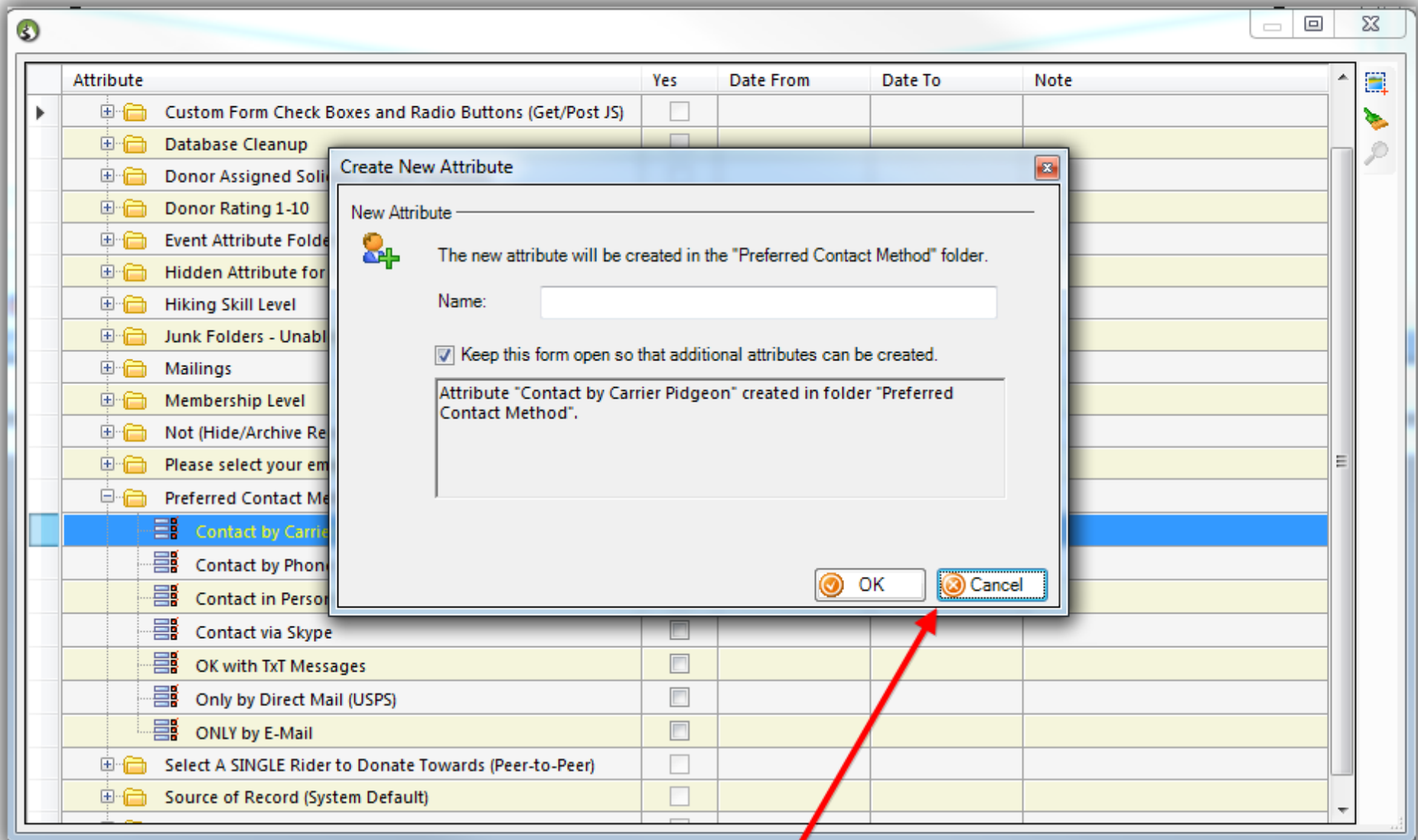


The screenshot shows the TrailBlazer interface with a 'Create New Attribute' dialog box open. The dialog box has a title bar 'Create New Attribute' and a close button. Inside, it says 'New Attribute' and 'The new attribute will be created in the "Preferred Contact Method" folder.' Below this, there is a 'Name:' label followed by a text input field containing 'Contact by Phone'. Underneath the input field is a checked checkbox with the text 'Keep this form open so that additional attributes can be created.' At the bottom of the dialog box are 'OK' and 'Cancel' buttons. A red arrow points from the text '1. Create a name.' to the 'Name' input field. Another red arrow points from the text '2. Check this box if you need to enter multiple items.' to the checked checkbox. A third red arrow points from the text '3. Click [OK] to save.' to the 'OK' button. The background shows a table with columns 'Attribute', 'Yes', 'Date From', 'Date To', and 'Note'. The 'Preferred Contact Method' folder is selected in the left-hand tree view.

**2. Check this box if you need to enter multiple items.**

**3. Click [OK] to save.**

When you are finished adding all of the **attribute items** for the **attribute folder** click the **[Cancel]** button to close the open window and view the **Attribute Tree**.



**Once you're finished entering the attribute items click [Cancel] to close this window.**

Your **Attribute Tree** should now be displaying the new folder and attribute items. It should look similar to the image below.

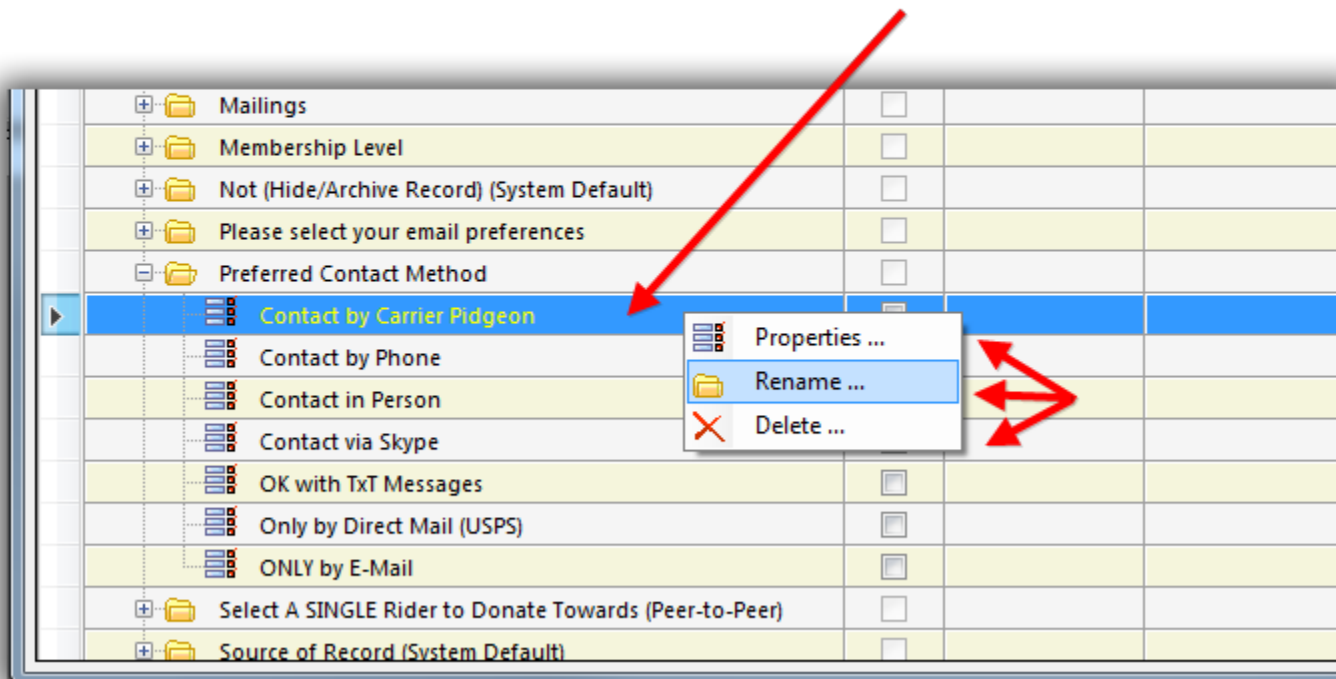
**View of the Attribute tree after the folder and items have been created.**

Attribute	Yes	Date From	Date To	Note
[-] Custom Form Check Boxes and Radio Buttons (Get/Post JS)	<input type="checkbox"/>			
[-] Database Cleanup	<input type="checkbox"/>			
[-] Donor Assigned Solicitor (Board Member)	<input type="checkbox"/>			
[-] Donor Rating 1-10	<input type="checkbox"/>			
[-] Event Attribute Folder #1	<input type="checkbox"/>			
[-] Hidden Attribute for Custom Get Post JS Form	<input type="checkbox"/>			
[-] Hiking Skill Level	<input type="checkbox"/>			
[-] Junk Folders - Unable to Delete (Reuse)	<input type="checkbox"/>			
[-] Mailings	<input type="checkbox"/>			
[-] Membership Level	<input type="checkbox"/>			
[-] Not (Hide/Archive Record) (System Default)	<input type="checkbox"/>			
[-] Please select your email preferences	<input type="checkbox"/>			
[+] Preferred Contact Method	<input type="checkbox"/>			
[-] Contact by Carrier Pidgeon	<input type="checkbox"/>			
[-] Contact by Phone	<input type="checkbox"/>			
[-] Contact in Person	<input type="checkbox"/>			
[-] Contact via Skype	<input type="checkbox"/>			
[-] OK with TxT Messages	<input type="checkbox"/>			
[-] Only by Direct Mail (USPS)	<input type="checkbox"/>			
[-] ONLY by E-Mail	<input type="checkbox"/>			
[-] Select A SINGLE Rider to Donate Towards (Peer-to-Peer)	<input type="checkbox"/>			
[-] Source of Record (System Default)	<input type="checkbox"/>			

Because the attribute system automatically syncs throughout your **Trail Blazer** database, you can view the same changes from other search windows and from within a **contact (voter/donor) record**.

**Tip:** To view more attribute properties, delete an attribute, or to rename it you can right-click the attribute item. **If an attribute is assigned to a record(s) you will not be able to delete until it has been un-assigned.** *Example:*

**Tip: Right-click on folders or items to bring up a context menu to view properties, delete, or rename.**





Take a look at the **related resources** below for links to other related articles and videos on how to utilize attributes for other purposes.



Trail Blazer™

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

## Resources

**Article:** [How to Un-assign an Attribute in Mass](#)

**Article:** [How to Mass Update a List of Contacts with an Attribute Item](#)

**Article:** [Delete an Attribute Folder and an Attribute Item](#)

**Article:** [Copying Attributes From One Database To Another](#)

**Article:** [How to Merge Attributes](#)

**Article:** [“I Can’t See my Attribute Checkboxes” – How to Adjust the DPI Screen Resolution of your Machine so that Checkboxes Display Correctly](#)

**Article:** [How to Use the NOT Attribute and Query for Records Tagged with It](#)

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

**Video:** [Attributes – Adding New](#)

**Video:** [Attributes – Delete](#)

**Video:** [Attributes – Assign en masse](#)

**Video:** [Not Attribute](#)

**Video:** [Attributes – Add attribute dates and notes to your list](#)

## Trail Blazer Live Support

☎ Phone: 1-866-909-8700

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

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

t **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.*