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.
How to Create Attribute Folders and Attribute Items (Custom Categories)

Steps

Navigate to the Contacts (Voters/Donors) list.
Click on the **Attribute** tab, and then click the [**Magnify**] button to enlarge the screen.
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.*
How to Create Attribute Folders and Attribute Items (Custom Categories)

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)**...
How to Create Attribute Folders and Attribute Items (Custom Categories)

Right-click.

Insert item (attribute)...

KNOWLEDGE BASE www.trailblz.com/kb
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.

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.
How to Create Attribute Folders and Attribute Items (Custom Categories)

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

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