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Overview

This article walks through the steps to **delete** or **rename** a <u>saved search query</u>. The steps were simplified in 2016 when our lead developer James Gibson developed a simple right-click method to complete this task—it used to require multiple steps.

Tip: This <u>video playlists</u> will get you up to speed on how to create queries (searches) which is one of the most important things you can learn to leverage the Trail Blazer software.

<u>Steps</u>



Navigate to the list where the saved query resides i.e. Voters/Donors, Contributions, Pledges, Thank-You Letters, etc. In my example I used the Contacts (Voters/Donors) list.



Navigate to the **Favorites** tab.



Navigate to the 'Favorites' tab. Note: saved searches *only* reside in the list they were built in.

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Right-click on the favorite search you want to either rename or delete. *In my example I right-clicked on one called 'Active (Individual) Members this Year w/Email'.*



Right-click on the favorite you want to either rename or delete.

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To rename the favorite select **Rename...** > provide a new name > Click **[OK]**. *Example below*.

To rename a favorite create a new name and click OK.

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To delete the favorite select **Delete** > click **[OK]**. *Example below*.



To delete a favorite click [OK].

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If you ever make a mistake by accidently deleting a favorite that you didn't mean to you can <u>roll-it-back</u>.

The related resources below link to a wide variety of articles and videos related to queries, and formatting.





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

Related Resources

Article: Save and Load a Search Query as a (Dynamic) Search Favorite



Article: How to Create a Donor LYBUNT Search Query (Donors Who Gave Last Year But Unfortunately Not This Year) and How to Save and Load it as a Search Favorite Article: Querying by Email Article: How to Use the NOT Attribute and Query for Records Tagged with It Article: SQL Wildcards Article: Advanced Queries - the SQL Tab Article: What Donors Have Increased Giving Over Last Year? Article: Creating and Saving Default Formats for Reporting with the Grid Article: How to Create a Year-by-Year Giving History Report using Filtered Contribution Columns in the Grid – Primarily for Nonprofits Article: Add Attributes, Attribute Dates, and Attribute Notes to the Grid by Formatting them in as Columns Video: Getting Started 102 – Beginning Queries Video: Favorites Deleting Saved Queries Video: Getting Started 104 – Queries with Wildcards Video: Favorite – Update and Delete Favorite Video: Reporting 102 – Quick Reports and Export Video: Reporting 105 – Pivots – summary reporting

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* As a policy we require that you have taken our intro training class before calling or emailing our live support team.

<u>*Click here*</u> 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 <u>GoToMeeting</u> session where we host our live interactive trainings.

* This service *is* included in your contract.