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**Last Updated:** 2016-11-9

## Overview

This article will teach you how to **undo** or “**rollback**” transactions in **Trail Blazer** if a **mistake** has been made.

The first section will cover rolling back a ‘**single**’ **transaction** in a **session** and the second section will cover rolling back a ‘**full session**’ of **transactions**. *Rollbacks can be very useful after running [imports](#) or other mass processes if they didn’t go as intended.*

 **Tip:** It’s useful to open a **new session** of **Trail Blazer** before running mass processes, and closing it after, so it’s easier to pinpoint the session or transaction(s) if you need to roll them back.

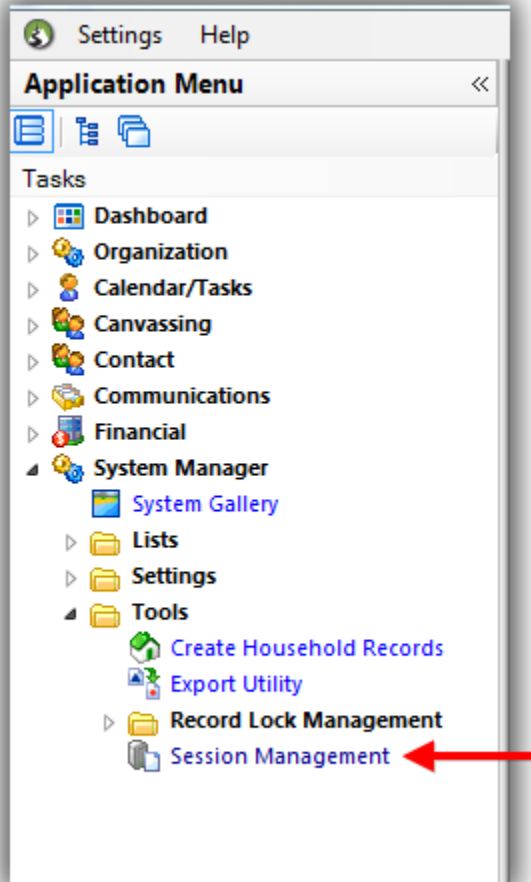
## Outline

- #1 Rollback a Single Transaction within a Session
- #2 Rollback a Full Session of Transactions
- #3 How to View the Activity of Changes to Specific Fields
- #4 Related Resources

### **#1 - Rollback a Single Transaction within a Session**

Navigate to **Session Management** under the **Application Menu** (*requires [administrative access](#)*).

## Rollback/Undo Function – Also, Tips on Viewing the Activity for Changes to Specific Fields (*\*Requires Admin Access*)



Enter the **date** to pull up the **session** where you want to roll back a **transaction**, and click **[Search]**. *In my example I queried for all logins on 11/8/2016 which provided 2 sessions.*

## Rollback/Undo Function – Also, Tips on Viewing the Activity for Changes to Specific Fields (*\*Requires Admin Access*)

**2**

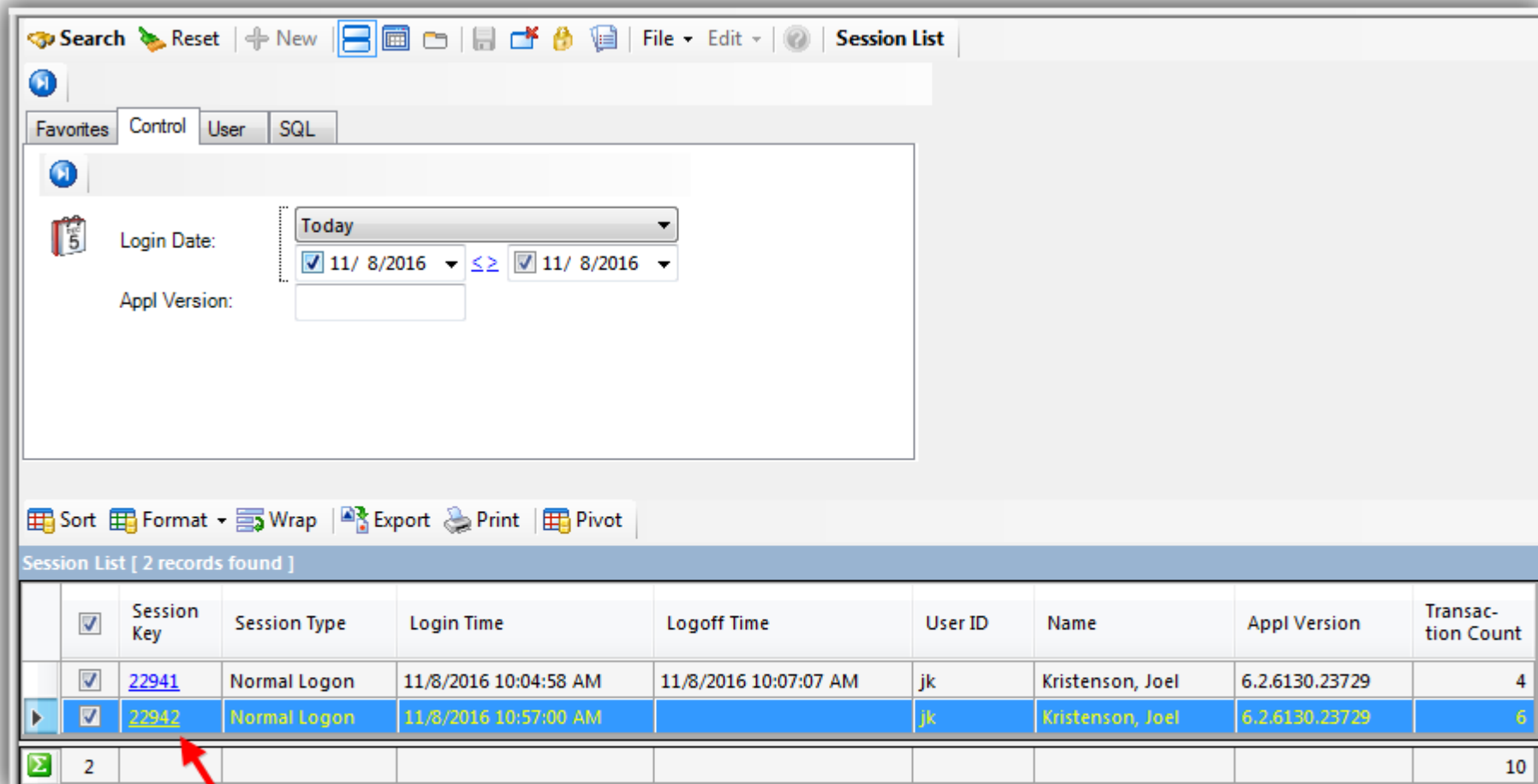
**1. Enter the date range for the login session you want to rollback a transaction for.**

Session Key	Session Type	Login Time	Logoff Time	User ID	Name	Appl Version	Transaction Count
22941	Normal Logon	11/8/2016 10:04:58 AM	11/8/2016 10:07:07 AM	jk	Kristenson, Joel	6.2.6130.23729	4
22942	Normal Logon	11/8/2016 10:57:00 AM		jk	Kristenson, Joel	6.2.6130.23729	6

**No. of login sessions for the date(s) you searched by.**

**Transaction counts.**

Click on the 'Session Key' hyperlink for the one you want to rollback a transaction for. *In my example I clicked on Session Key 22942.*



Search Reset New [Icons] File Edit ? Session List

Favorites Control User SQL

Login Date: Today  
11/ 8/2016 ≤≥ 11/ 8/2016  
Appl Version:

Sort Format Wrap Export Print Pivot

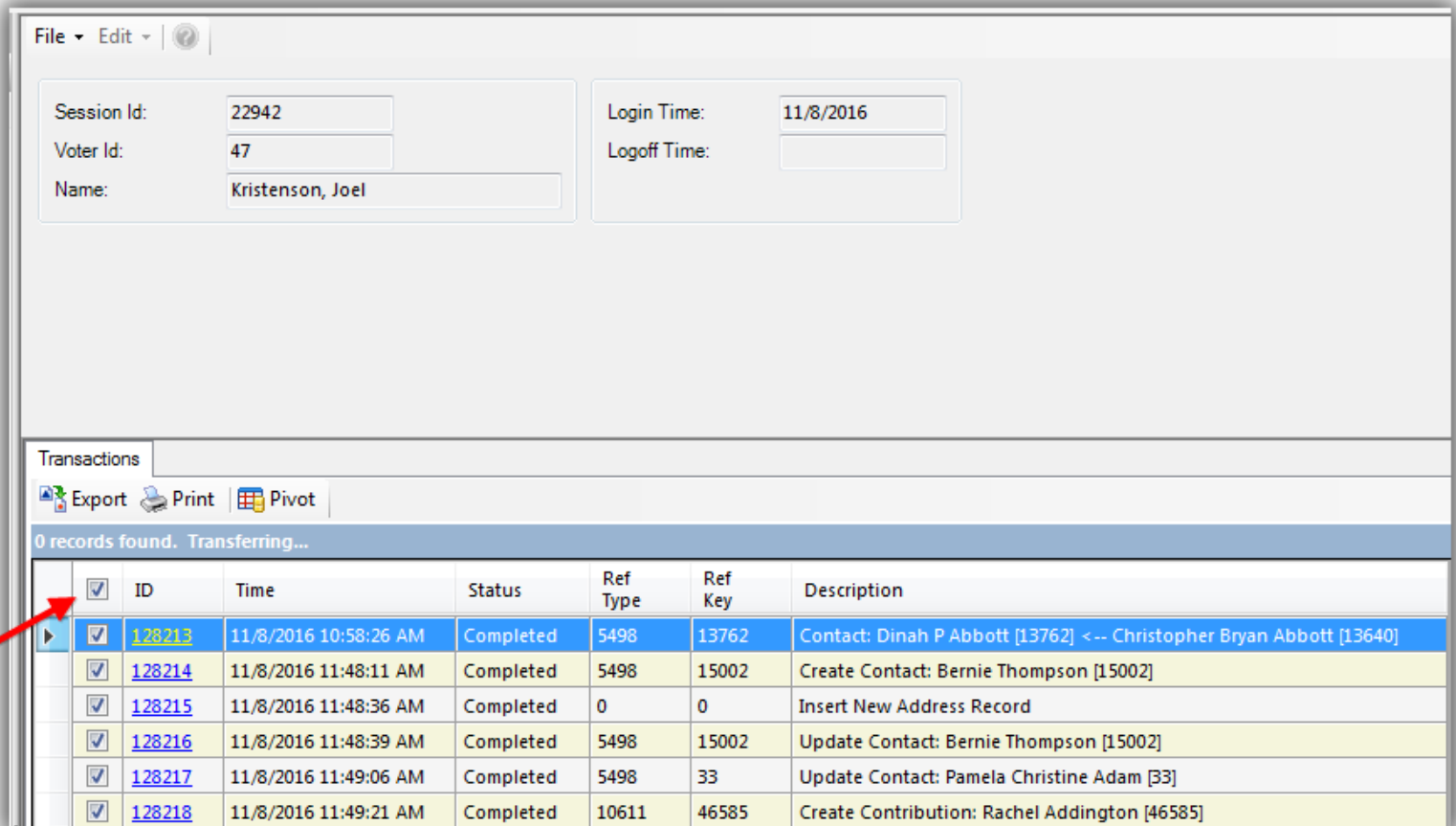
Session List [ 2 records found ]

<input checked="" type="checkbox"/>	Session Key	Session Type	Login Time	Logoff Time	User ID	Name	Appl Version	Transaction Count
<input checked="" type="checkbox"/>	<a href="#">22941</a>	Normal Logon	11/8/2016 10:04:58 AM	11/8/2016 10:07:07 AM	jk	Kristenson, Joel	6.2.6130.23729	4
<input checked="" type="checkbox"/>	<a href="#">22942</a>	Normal Logon	11/8/2016 10:57:00 AM		jk	Kristenson, Joel	6.2.6130.23729	6
<input checked="" type="checkbox"/>	2							10

**Click on the 'Session Key' for the session that has the transaction you want to rollback.**

## Rollback/Undo Function – Also, Tips on Viewing the Activity for Changes to Specific Fields (*\*Requires Admin Access*)

Uncheck **\*all\*** the boxes in the first column. You can do this quickly unchecking the top-most box.



The screenshot shows the TrailBlazer interface. At the top, there are input fields for Session Id (22942), Voter Id (47), Name (Kristenson, Joel), Login Time (11/8/2016), and Logoff Time. Below this is a 'Transactions' section with 'Export', 'Print', and 'Pivot' buttons. A message states '0 records found. Transferring...'. A table follows with columns: ID, Time, Status, Ref Type, Ref Key, and Description. The table contains six rows of transaction data. A red arrow points to the top-most checkbox in the first column of the table.

<input checked="" type="checkbox"/>	ID	Time	Status	Ref Type	Ref Key	Description
<input checked="" type="checkbox"/>	<a href="#">128213</a>	11/8/2016 10:58:26 AM	Completed	5498	13762	Contact: Dinah P Abbott [13762] <-- Christopher Bryan Abbott [13640]
<input checked="" type="checkbox"/>	<a href="#">128214</a>	11/8/2016 11:48:11 AM	Completed	5498	15002	Create Contact: Bernie Thompson [15002]
<input checked="" type="checkbox"/>	<a href="#">128215</a>	11/8/2016 11:48:36 AM	Completed	0	0	Insert New Address Record
<input checked="" type="checkbox"/>	<a href="#">128216</a>	11/8/2016 11:48:39 AM	Completed	5498	15002	Update Contact: Bernie Thompson [15002]
<input checked="" type="checkbox"/>	<a href="#">128217</a>	11/8/2016 11:49:06 AM	Completed	5498	33	Update Contact: Pamela Christine Adam [33]
<input checked="" type="checkbox"/>	<a href="#">128218</a>	11/8/2016 11:49:21 AM	Completed	10611	46585	Create Contribution: Rachel Addington [46585]

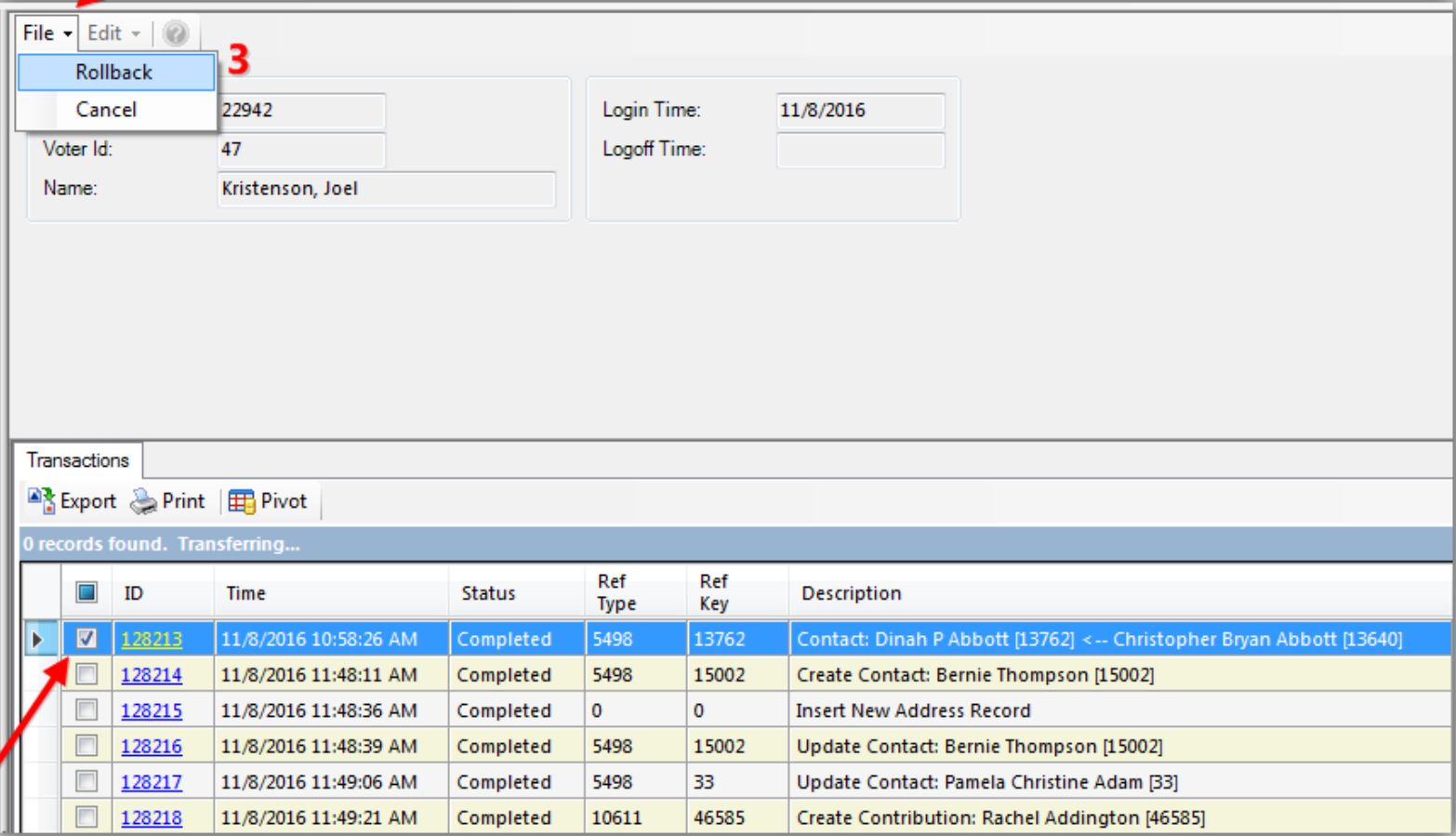
**Uncheck this box so that all checked boxes below become 'unchecked'.**

## Rollback/Undo Function – Also, Tips on Viewing the Activity for Changes to Specific Fields (*\*Requires Admin Access*)

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**Check the box** next to the **specific transaction** you want to rollback, then select **File > Rollback**. *In my example I checked the box for a contact merge where the merge should not have occurred.*

## Rollback/Undo Function – Also, Tips on Viewing the Activity for Changes to Specific Fields (*\*Requires Admin Access*)



The screenshot displays the TrailBlazer interface. At the top, there is a menu bar with 'File' and 'Edit'. A 'Rollback' dialog box is open, showing a 'Cancel' button and a 'Rollback' button. The dialog box contains fields for 'Voter Id' (47), 'Name' (Kristenson, Joel), 'Login Time' (11/8/2016), and 'Logoff Time'. Below the dialog box, there is a 'Transactions' section with 'Export', 'Print', and 'Pivot' buttons. A message states '0 records found. Transferring...'. Below this, a table lists transactions with columns for ID, Time, Status, Ref Type, Ref Key, and Description. The first transaction is selected, and its checkbox is checked.

ID	Time	Status	Ref Type	Ref Key	Description
<input checked="" type="checkbox"/> 128213	11/8/2016 10:58:26 AM	Completed	5498	13762	Contact: Dinah P Abbott [13762] <-- Christopher Bryan Abbott [13640]
<input type="checkbox"/> 128214	11/8/2016 11:48:11 AM	Completed	5498	15002	Create Contact: Bernie Thompson [15002]
<input type="checkbox"/> 128215	11/8/2016 11:48:36 AM	Completed	0	0	Insert New Address Record
<input type="checkbox"/> 128216	11/8/2016 11:48:39 AM	Completed	5498	15002	Update Contact: Bernie Thompson [15002]
<input type="checkbox"/> 128217	11/8/2016 11:49:06 AM	Completed	5498	33	Update Contact: Pamela Christine Adam [33]
<input type="checkbox"/> 128218	11/8/2016 11:49:21 AM	Completed	10611	46585	Create Contribution: Rachel Addington [46585]

**1. Check the box for the single transaction you want to rollback.**

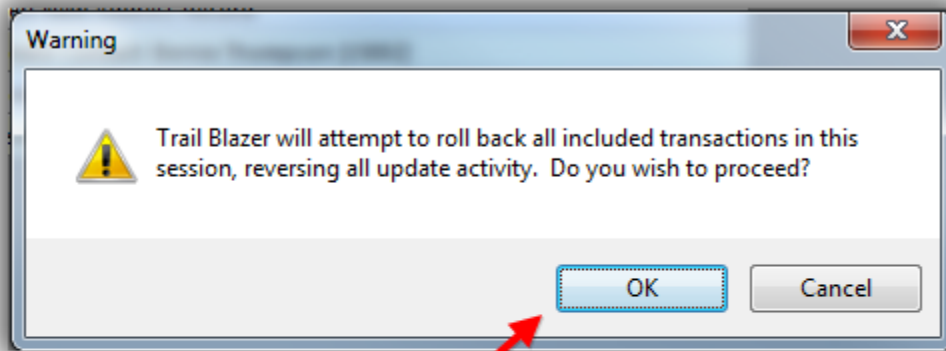
**In this example it was a merge of contact records that should not have been merged.**



## Rollback/Undo Function – Also, Tips on Viewing the Activity for Changes to Specific Fields (*\*Requires Admin Access*)

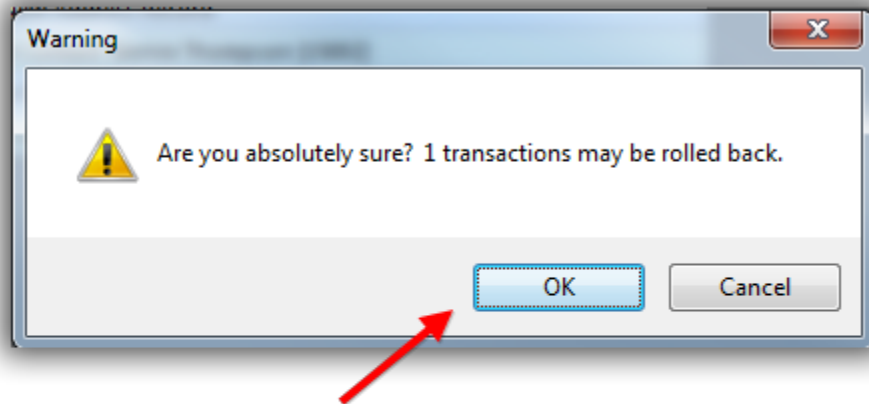
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You'll get a popup warning, click **[OK]** to proceed if you're **100% certain** you want to rollback the single transaction.



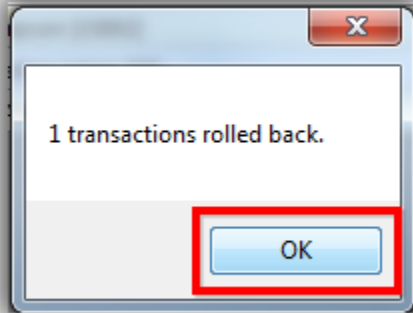
**If you are 100% certain you want to roll the transaction back click [OK].**

You'll get a second popup warning, this one will display the **total amount** of transactions that will be rolled back, click **[OK]** to proceed. *Just like construction; measure twice, cut once. Always verify the transaction you are about to rollback before moving forward, this is **not reversible**.*



**Click [OK] again if you're certain you want to roll the single transaction back.**

After the rollback has finished you'll get a notification with the results, click **[OK]**.



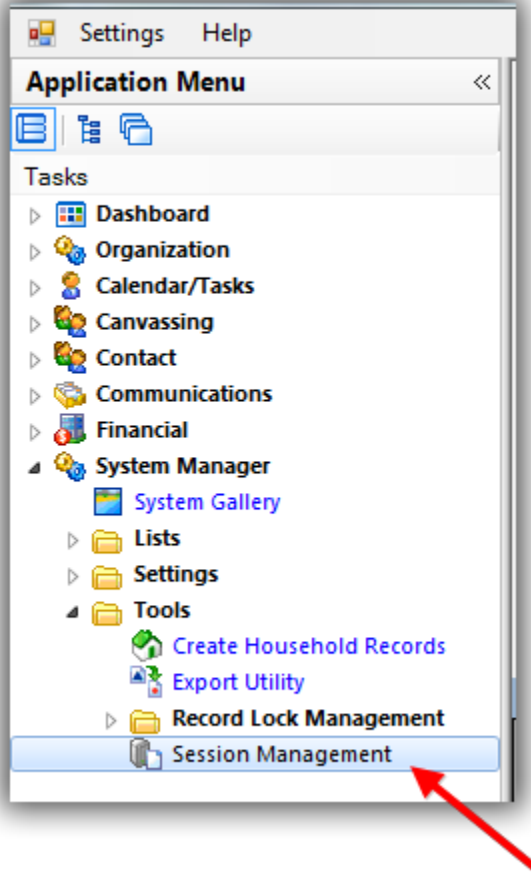
**Note:** If subsequent changes have been made to the record where you are trying to rollback transactions, it may fail. For instance if you merged contact records weeks ago, and made changes to the new 'merged' record, you would first need to rollback all subsequent changes before you could rollback the original merge.

The next section shows how to rollback a **full session** of transactions. This can be common if an [import](#) of data was botched.

## #2 Rollback a Full Session of Transactions

## Rollback/Undo Function – Also, Tips on Viewing the Activity for Changes to Specific Fields (*\*Requires Admin Access*)

Navigate to **Session Management** under the **Application Menu**.



Enter the **date range** for the date where the session exists that you want to rollback, and click **[Search]**. *In my example I search by 11/8/2016 which produced 4 results. The **transaction counts** will display on the far right, if the count is higher it means more activity occurred for that session.*

## Rollback/Undo Function – Also, Tips on Viewing the Activity for Changes to Specific Fields (\*Requires Admin Access)

**2**

**1. Enter the date range for the session log you want to rollback.**

**Transaction Counts**

**Results**

Session Key	Session Type	Login Time	Logoff Time	User ID	Name	Appl Version	Transaction Count
<a href="#">22941</a>	Normal Logon	11/8/2016 10:04:58 AM	11/8/2016 10:07:07 AM	jk	Kristenson, Joel	6.2.6130.23729	4
<a href="#">22942</a>	Normal Logon	11/8/2016 10:57:00 AM	11/8/2016 12:43:21 PM	jk	Kristenson, Joel	6.2.6130.23729	7
<a href="#">22943</a>	Normal Logon	11/8/2016 12:53:39 PM	11/8/2016 12:58:42 PM	jk	Kristenson, Joel	6.2.6130.23729	34
<a href="#">22944</a>	Normal Logon	11/8/2016 12:58:47 PM		jk	Kristenson, Joel	6.2.6130.23729	0
<b>4</b>							<b>45</b>

Click on the **Session Key** hyperlink for the session you want to rollback. *In my example I clicked on **Session Key 22943**.*

## Rollback/Undo Function – Also, Tips on Viewing the Activity for Changes to Specific Fields (*\*Requires Admin Access*)

The screenshot displays the TrailBlazer 'Session List' interface. At the top, there is a search bar and a toolbar with icons for Search, Reset, New, and various file operations. Below the search bar are tabs for Favorites, Control, User, and SQL. The main area contains a filter section with a 'Login Date' dropdown set to 'Today' and two date range selectors for '11/ 8/2016'. Below the filters is a toolbar with options for Sort, Format, Wrap, Export, Print, and Pivot. The main content is a table titled 'Session List [ 4 records found ]' with the following data:

	<input checked="" type="checkbox"/>	Session Key	Session Type	Login Time	Logoff Time	User ID	Name	Appl Version	Transaction Count
	<input checked="" type="checkbox"/>	<a href="#">22941</a>	Normal Logon	11/8/2016 10:04:58 AM	11/8/2016 10:07:07 AM	jk	Kristenson, Joel	6.2.6130.23729	4
	<input checked="" type="checkbox"/>	<a href="#">22942</a>	Normal Logon	11/8/2016 10:57:00 AM	11/8/2016 12:43:21 PM	jk	Kristenson, Joel	6.2.6130.23729	7
	<input checked="" type="checkbox"/>	<a href="#">22943</a>	Normal Logon	11/8/2016 12:53:39 PM	11/8/2016 12:58:42 PM	jk	Kristenson, Joel	6.2.6130.23729	34
	<input checked="" type="checkbox"/>	<a href="#">22944</a>	Normal Logon	11/8/2016 12:58:47 PM		jk	Kristenson, Joel	6.2.6130.23729	0
	<input checked="" type="checkbox"/>	4							45

A red arrow points to the 'Session Key' 22943 in the table.

**Click on the 'Session Key' hyperlink for the one you want to open and rollback.**

**In this example it was No 22943 with 34 transactions.**

## Rollback/Undo Function – Also, Tips on Viewing the Activity for Changes to Specific Fields (*\*Requires Admin Access*)

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This will open the **entire session** and provide details on what occurred. Select **File > Rollback**.

# Rollback/Undo Function – Also, Tips on Viewing the Activity for Changes to Specific Fields (*\*Requires Admin Access*)

File Edit

**Rollback**

Cancel

Voter Id: 22943

Name: Kristenson, Joel

Login Time: 11/8/2016

Logoff Time: 11/8/2016

Transactions

Export Print Pivot

0 records found. Transferring...

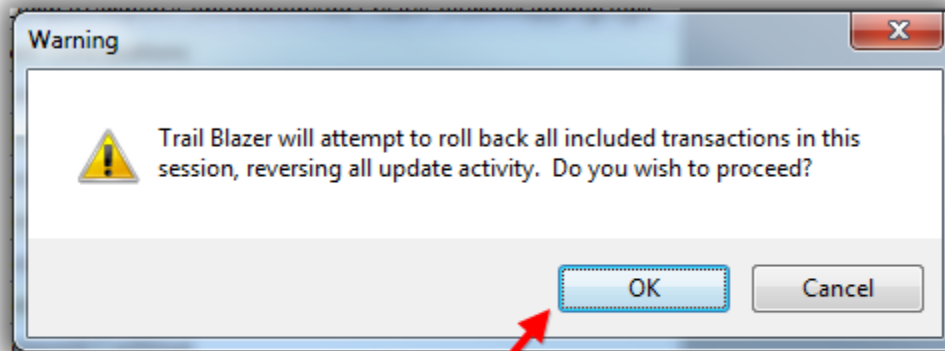
ID	Time	Status	Ref Type	Ref Key	Description
128220	11/8/2016 12:57:10 PM	Completed	0	0	Update Registry
128221	11/8/2016 12:57:10 PM	Completed	0	0	Update Registry
128222	11/8/2016 12:57:51 PM	Completed	0	0	Tri/Compact/Import/ContributionAdd.CreateColumnMappingLogN...
128223	11/8/2016 12:57:51 PM	Completed	0	0	Import Contributions
128224	11/8/2016 12:57:53 PM	Completed	0	0	Checkpoint/Continue
128225	11/8/2016 12:57:53 PM	Completed	0	0	Checkpoint/Continue
128226	11/8/2016 12:57:53 PM	Completed	0	0	Checkpoint/Continue
128227	11/8/2016 12:57:54 PM	Completed	0	0	Checkpoint/Continue
128228	11/8/2016 12:57:54 PM	Completed	0	0	Checkpoint/Continue
128229	11/8/2016 12:57:55 PM	Completed	0	0	Checkpoint/Continue
128230	11/8/2016 12:57:55 PM	Completed	0	0	Checkpoint/Continue
128231	11/8/2016 12:57:55 PM	Completed	0	0	Checkpoint/Continue
128232	11/8/2016 12:57:56 PM	Completed	0	0	Checkpoint/Continue
128233	11/8/2016 12:58:00 PM	Completed	0	0	Checkpoint/Continue
128234	11/8/2016 12:58:01 PM	Completed	0	0	Checkpoint/Continue
128235	11/8/2016 12:58:04 PM	Completed	0	0	Checkpoint/Continue
128236	11/8/2016 12:58:04 PM	Completed	0	0	Checkpoint/Continue
128237	11/8/2016 12:58:04 PM	Completed	0	0	Checkpoint/Continue
128238	11/8/2016 12:58:05 PM	Completed	0	0	Checkpoint/Continue
128239	11/8/2016 12:58:05 PM	Completed	0	0	Checkpoint/Continue
128240	11/8/2016 12:58:05 PM	Completed	0	0	Checkpoint/Continue
128241	11/8/2016 12:58:06 PM	Completed	0	0	Checkpoint/Continue
128242	11/8/2016 12:58:06 PM	Completed	0	0	Checkpoint/Continue
128243	11/8/2016 12:58:07 PM	Completed	0	0	Checkpoint/Continue
128244	11/8/2016 12:58:07 PM	Completed	0	0	Checkpoint/Continue
128245	11/8/2016 12:58:07 PM	Completed	0	0	Checkpoint/Continue

Details of what occurred in this session.

In this example it was a mass import of contribution data.



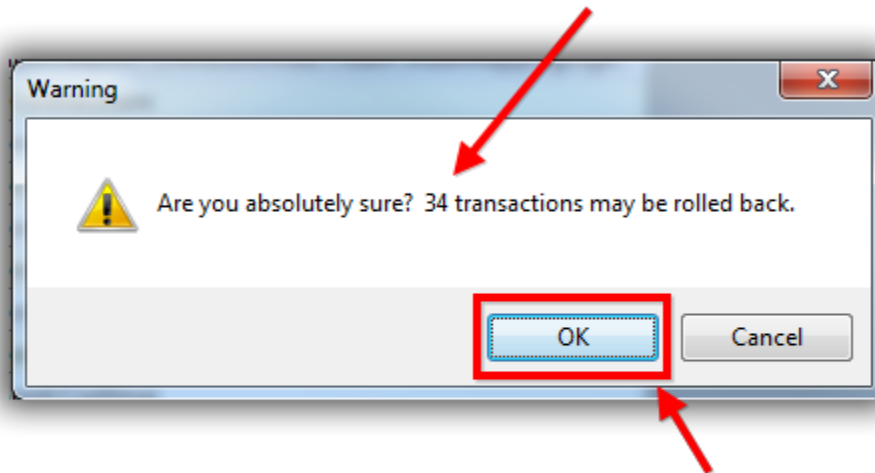
You'll get a warning message, click **[OK]**.



**Click [OK] to proceed.**

You'll get a second warning that displays the **total amount** of **transactions** that are about to be rolled back. Click **[OK]** if you're 100% certain you want to rollback the full session. *In my example I had 34 transactions in my session for an import of contributions.*

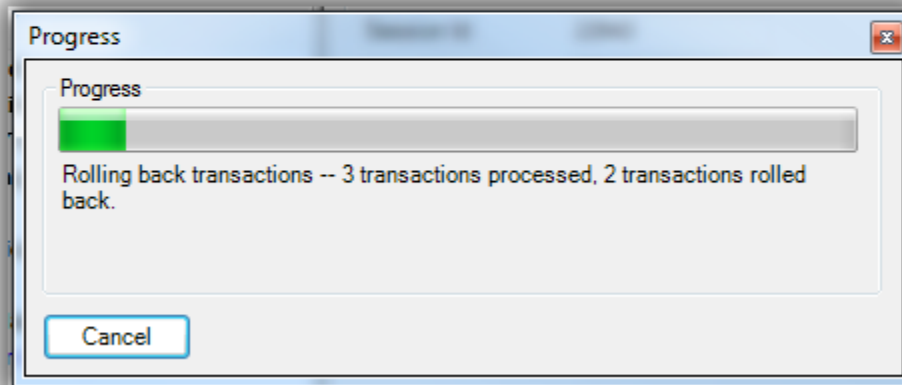
### Total amount of 'transactions' that will be rolled back.



**Click [OK] to proceed with the rollback of the entire session if you're 100% sure.**

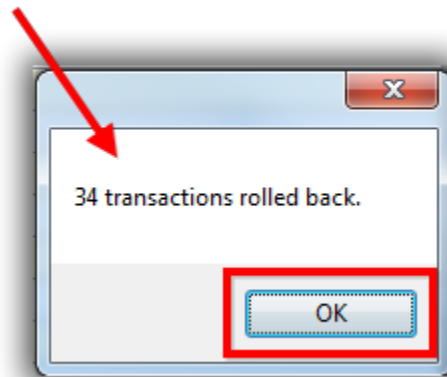
You'll get a **status notification** as the process runs. *It could take a **long time** to run if you're rolling back hundreds of thousands or millions of transactions.*

**You'll get a status animation as the rollback takes place. If it's a large list of transactions it could take a substantial amount of time. For instance if you're rolling back millions of transactions.**



You'll get a popup notification that displays the results once the process has finished, click **[OK]** to finish.

### Rollback results.



The final section of this article talks about how to view the **activity** of **specific fields** in the database.

### #3 How to View the Activity of Changes to Specific Fields

**Navigate** to the section of the software where you want to **view changes** that were made to a **specific field**, some examples could include:

- Contribution Record
- Contact (Voter/Donor) Record
- Event Record

## Rollback/Undo Function – Also, Tips on Viewing the Activity for Changes to Specific Fields (*\*Requires Admin Access*)

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In my example I [queried](#) for my own contact record and opened it.

## Rollback/Undo Function – Also, Tips on Viewing the Activity for Changes to Specific Fields (*\*Requires Admin Access*)

The screenshot shows the TrailBlazer software interface. On the left is an 'Application Menu' with categories like Dashboard, Organization, Calendar/Tasks, and Contact. The main area displays a contact record card for 'Joel Kristenson'. The card includes fields for Last Name (Kristenson), First/Org Name, Middle Name, Nickname, and Prior Last Name. Below the card is a table of contacts with one record found. A red arrow points to the 'First Name' field in the table.

ID	Title	Last Name	First Name	Street	Street 2	City	State	Zip Code	Home Phone
12796	Senor	Kristenson	Joel	9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427	(218) 442-1919

**Navigate to the area of the software where you want to view the activity of changes to a specific field, in this example I opened a contact record card.**

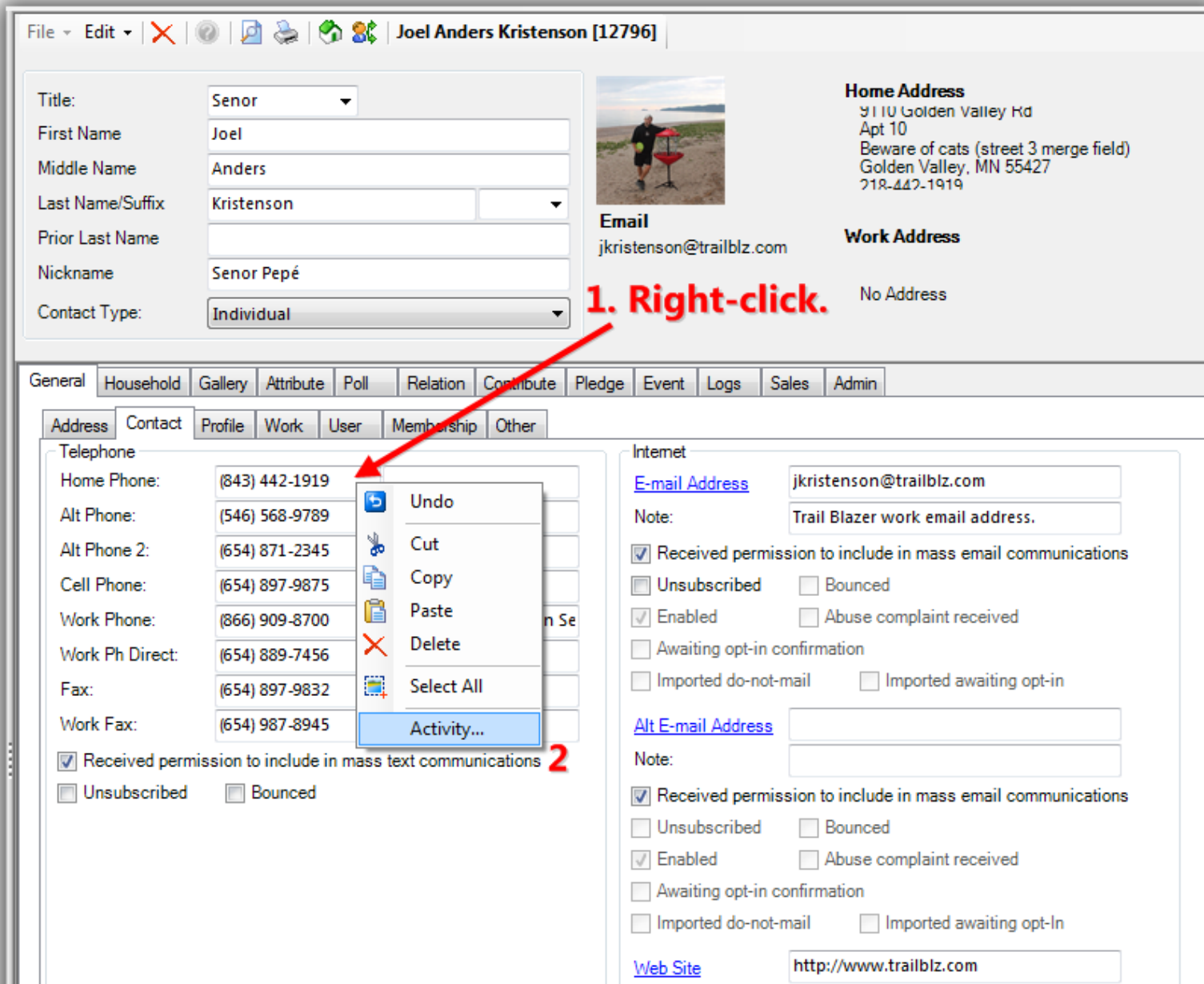
## Rollback/Undo Function – Also, Tips on Viewing the Activity for Changes to Specific Fields (*\*Requires Admin Access*)

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**Locate the field** that you want to view the **activity** for, **right-click** in the field, and select '**Activity...**'. *In my example I performed this on a **home phone** field.*

## Rollback/Undo Function – Also, Tips on Viewing the Activity for Changes to Specific Fields (*\*Requires Admin Access*)

**Note: Viewing the activity (audit trail) doesn't work on every field in the application.**



**1. Right-click.**

**2**

**Title:** Senor

**First Name:** Joel

**Middle Name:** Anders

**Last Name/Suffix:** Kristenson

**Prior Last Name:**

**Nickname:** Senor Pepé

**Contact Type:** Individual

**Home Address:** 9110 Golden Valley Rd  
Apt 10  
Beware of cats (street 3 merge field)  
Golden Valley, MN 55427  
218-442-1919

**Work Address:** No Address

**Email:** jkristenson@trailblz.com

**Telephone:**

Home Phone:	(843) 442-1919
Alt Phone:	(546) 568-9789
Alt Phone 2:	(654) 871-2345
Cell Phone:	(654) 897-9875
Work Phone:	(866) 909-8700
Work Ph Direct:	(654) 889-7456
Fax:	(654) 897-9832
Work Fax:	(654) 987-8945

Received permission to include in mass text communications

Unsubscribed  Bounced

**Internet:**

**E-mail Address:** jkristenson@trailblz.com

**Note:** Trail Blazer work email address.

Received permission to include in mass email communications

Unsubscribed  Bounced

Enabled  Abuse complaint received

Awaiting opt-in confirmation

Imported do-not-mail  Imported awaiting opt-in

**Alt E-mail Address:**

**Note:**

Received permission to include in mass email communications

Unsubscribed  Bounced

Enabled  Abuse complaint received

Awaiting opt-in confirmation

Imported do-not-mail  Imported awaiting opt-in

**Web Site:** http://www.trailblz.com

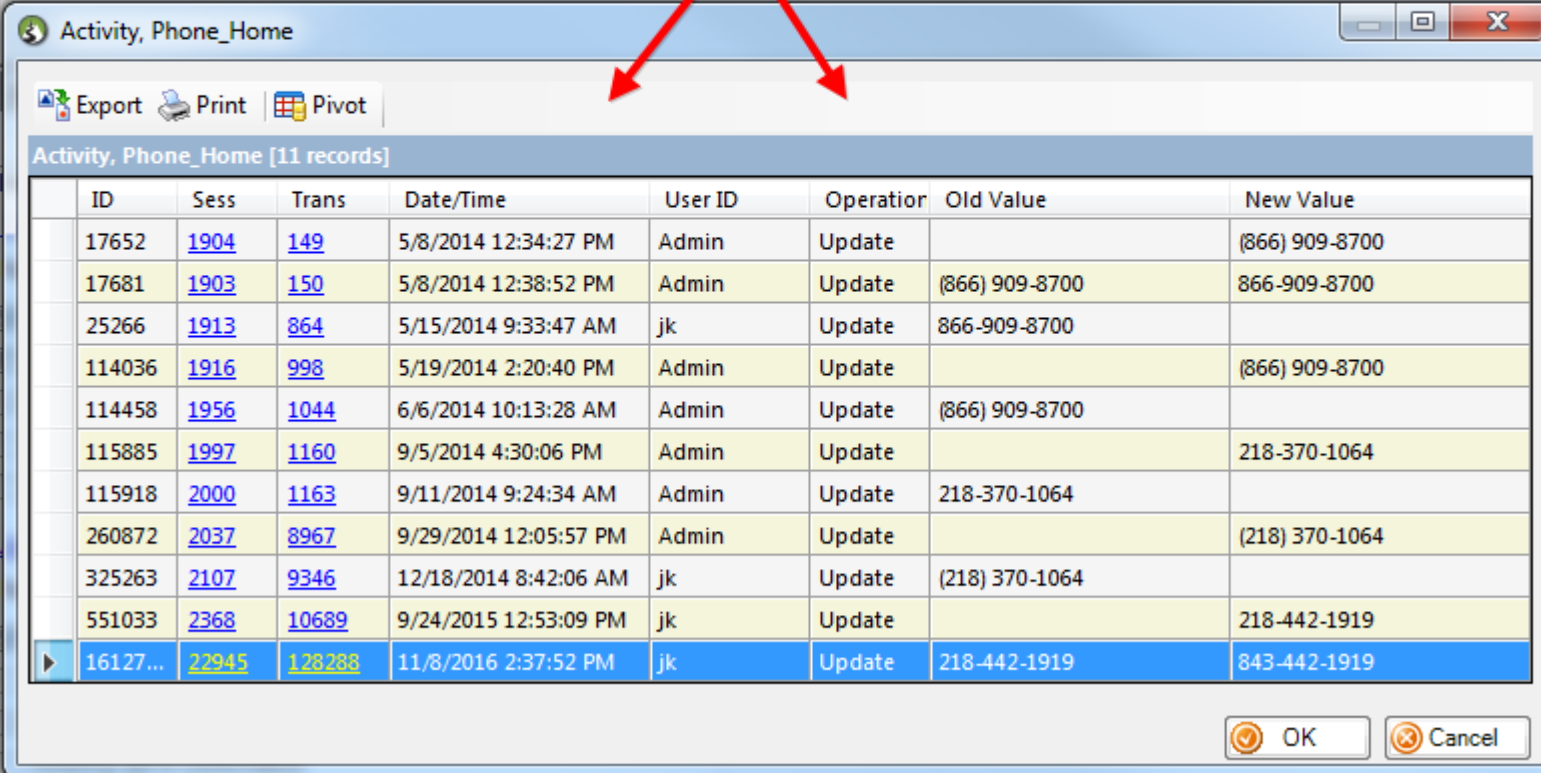


## Rollback/Undo Function – Also, Tips on Viewing the Activity for Changes to Specific Fields (*\*Requires Admin Access*)

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Below is my *example activity report* for the home phone number field. The report will included the **date, time**, and who the **users** were that made changes. *In my example the field was modified 11 times.*

**This will bring up an activity report for all changes made to the specific field including date, time, and user.**



Activity, Phone\_Home [11 records]

ID	Sess	Trans	Date/Time	User ID	Operation	Old Value	New Value
17652	<a href="#">1904</a>	<a href="#">149</a>	5/8/2014 12:34:27 PM	Admin	Update		(866) 909-8700
17681	<a href="#">1903</a>	<a href="#">150</a>	5/8/2014 12:38:52 PM	Admin	Update	(866) 909-8700	866-909-8700
25266	<a href="#">1913</a>	<a href="#">864</a>	5/15/2014 9:33:47 AM	jk	Update	866-909-8700	
114036	<a href="#">1916</a>	<a href="#">998</a>	5/19/2014 2:20:40 PM	Admin	Update		(866) 909-8700
114458	<a href="#">1956</a>	<a href="#">1044</a>	6/6/2014 10:13:28 AM	Admin	Update	(866) 909-8700	
115885	<a href="#">1997</a>	<a href="#">1160</a>	9/5/2014 4:30:06 PM	Admin	Update		218-370-1064
115918	<a href="#">2000</a>	<a href="#">1163</a>	9/11/2014 9:24:34 AM	Admin	Update	218-370-1064	
260872	<a href="#">2037</a>	<a href="#">8967</a>	9/29/2014 12:05:57 PM	Admin	Update		(218) 370-1064
325263	<a href="#">2107</a>	<a href="#">9346</a>	12/18/2014 8:42:06 AM	jk	Update	(218) 370-1064	
551033	<a href="#">2368</a>	<a href="#">10689</a>	9/24/2015 12:53:09 PM	jk	Update		218-442-1919
16127...	<a href="#">22945</a>	<a href="#">128288</a>	11/8/2016 2:37:52 PM	jk	Update	218-442-1919	843-442-1919

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



## Trail Blazer™

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

## Related Resources

**Article:** [Running an Import of Contact Data from Excel into your Database – Basic Overview](#)

**Article:** [Start Import](#)

**Article:** [Pre-Import Check](#)

**Article:** [Import Templates](#)

**Article:** [Importing Contributions](#)

**Article:** [Field/Column Mapping When Importing Voter/Donor Data](#)

**Article:** [Splitting ‘Couples’ into Separate Records En Masse using the Built-In Utility](#)

**Article:** [Managing Households – Creating, Deleting, and Re-Creating](#)

**Article:** [Voter History Imports – Required Import Format for Voter History CSV Imports – 2016 Upgrade](#)

**Article:** [Import Information – Definitions and Column Data Type](#)

**Article:** [Automatically Conform Addresses](#)

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

**Article:** [Auto-Merge Duplicate Contact Records](#)

**Video:** [How to Manage Duplicates](#)

**Video:** [Importing 101 What to Avoid](#)

**Video:** [Households – Delete and Recreate](#)

## Trail Blazer Live Support

☎ **Phone:** 1-866-909-8700

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

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

## Rollback/Undo Function – Also, Tips on Viewing the Activity for Changes to Specific Fields (*\*Requires Admin Access*)

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 **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.*