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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.
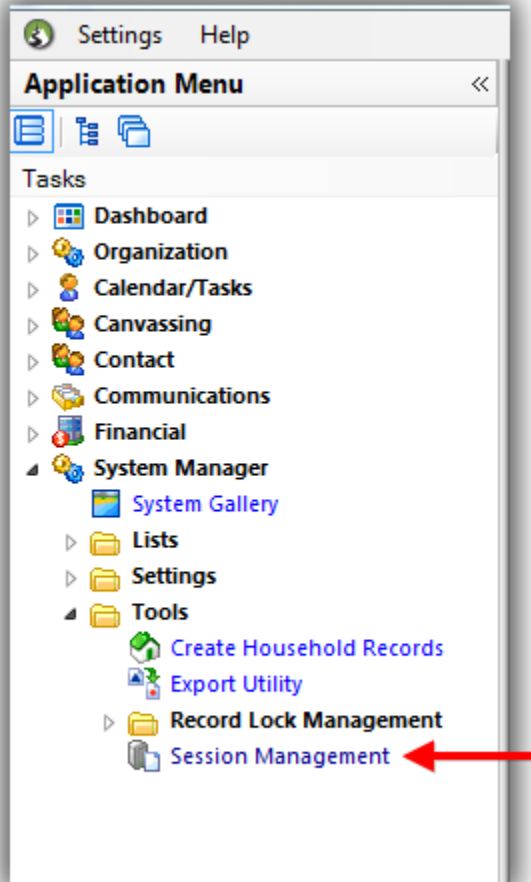
Outline

#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)*.

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.*

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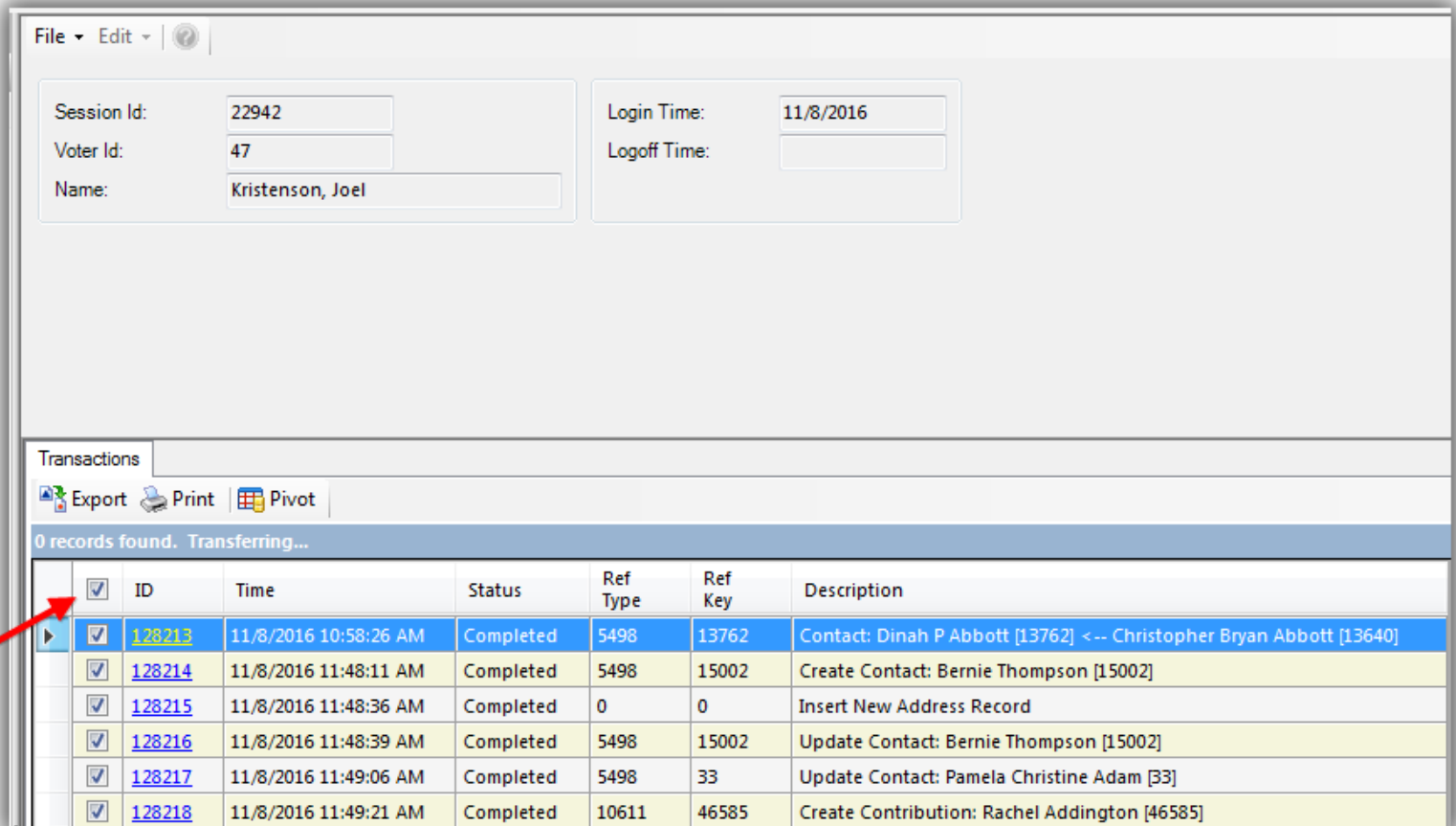
Click on the 'Session Key' for the session that has the transaction you want to rollback.

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

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

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.*

2

| File ▾ | Edit ▾ | ⑦ |

3

| Rollback |
| Cancel | 22942 |

Voter Id: 47

Name: Kristenson, Joel

Login Time: 11/8/2016

Logoff Time:

Transactions

📊 Export 🖨 Print | 📊 Pivot

0 records found. Transferring...

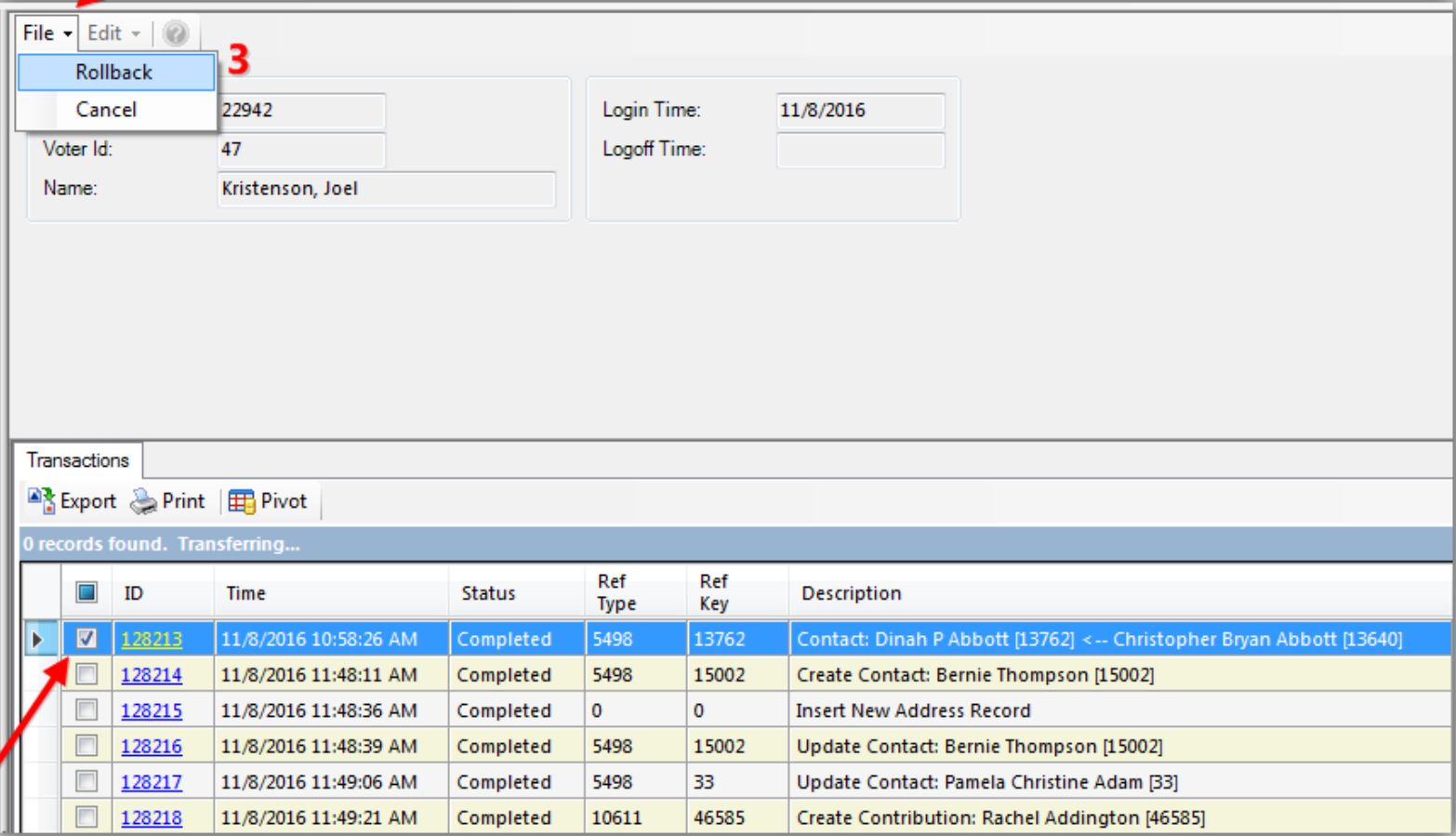|	ID	Time	Status	Ref Type	Ref Key	Description
▶ ☑	128213	11/8/2016 10:58:26 AM	Completed	5498	13762	Contact: Dinah P Abbott [13762] < -- Christopher Bryan Abbott [13640]
☐	128214	11/8/2016 11:48:11 AM	Completed	5498	15002	Create Contact: Bernie Thompson [15002]
☐	128215	11/8/2016 11:48:36 AM	Completed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

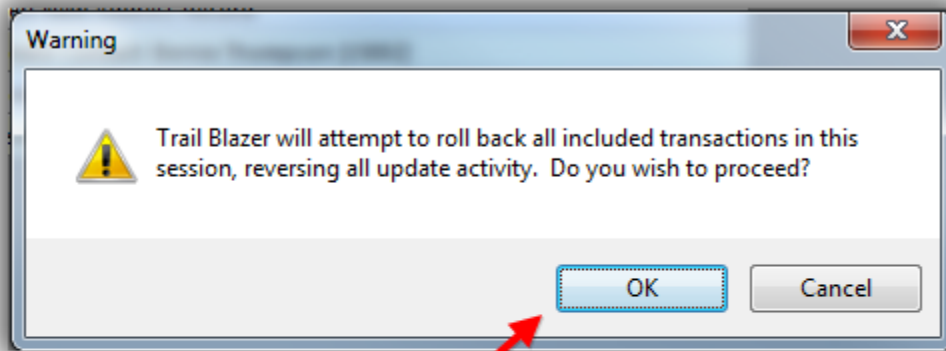**1. Check the box for the single transaction you want to rollback.**

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

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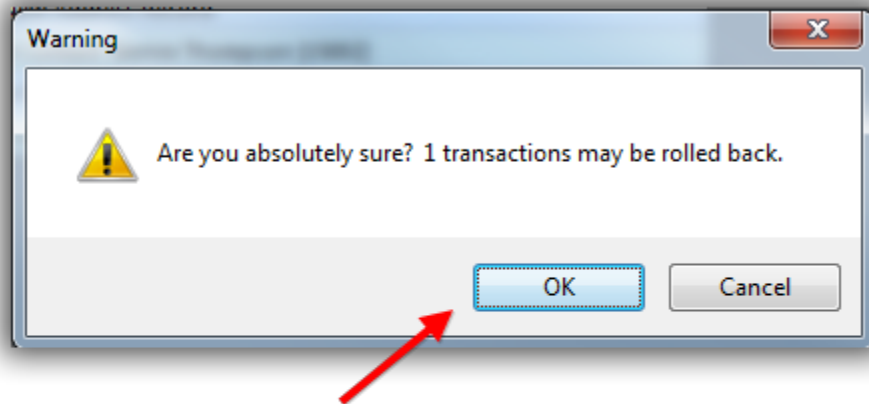
Click [OK] again if you're certain you want to roll the single transaction back.

After the rollback has finished you'll get a notification with the results, click **[OK]**.
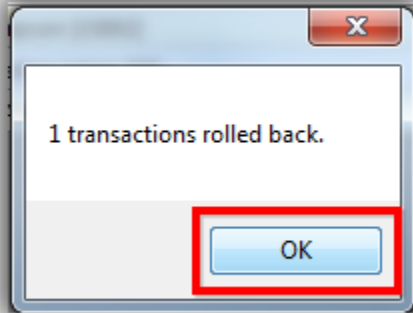
Note: If subsequent changes have been made to the record where you are trying to rollback transactions, it may fail. For instance if you merged contact records weeks ago, and made changes to the new 'merged' record, you would first need to rollback all subsequent changes before you could rollback the 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

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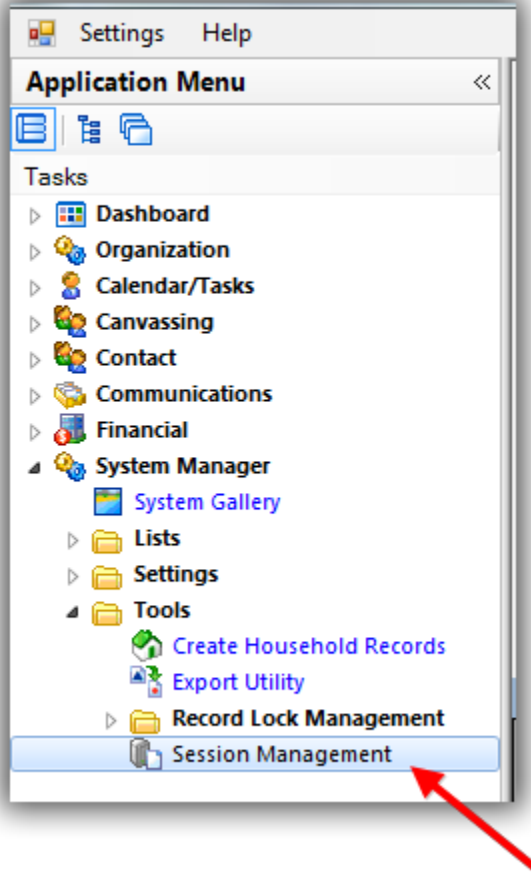
Enter the **date range** for the date where the session exists that you want to rollback, and click **[Search]**. *In my example I search by 11/8/2016 which produced 4 results. The **transaction counts** will display on the far right, if the count is higher it means more activity occurred for that session.*

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

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.

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

Details of what occured in this session.

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

'kb   16

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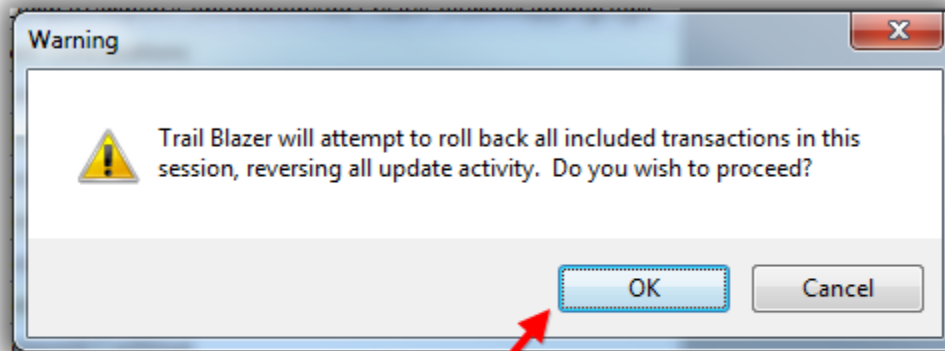
You'll get a second warning that displays the **total amount** of **transactions** that are about to be rolled back. Click **[OK]** if you're 100% certain you want to rollback the full session. *In my example I had 34 transactions in my session for an import of contributions.*

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

Warning

⚠ Are you absolutely sure? 34 transactions may be rolled back.

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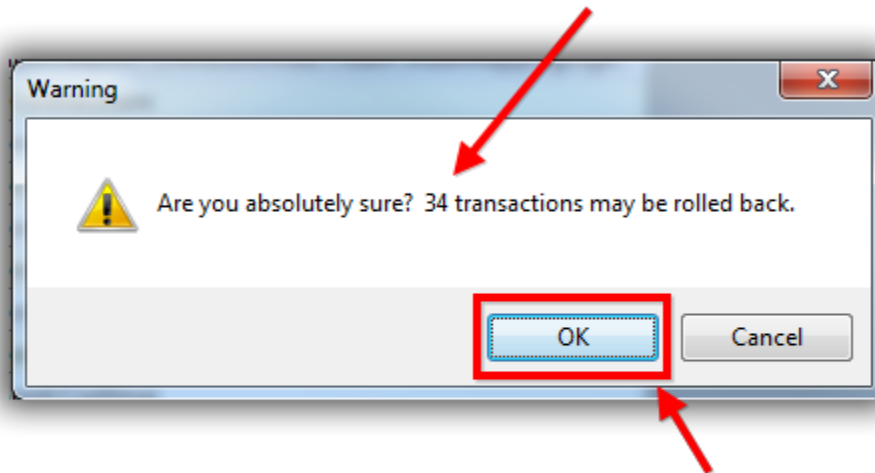
Click [OK] to proceed with the rollback of the entire session if you're 100% sure.

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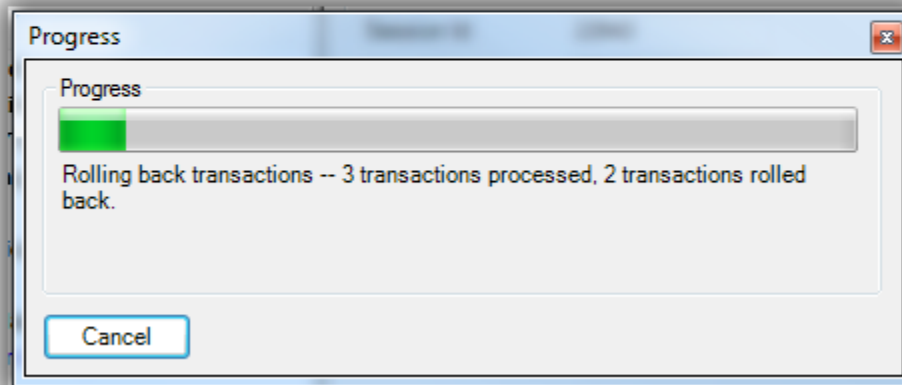
You'll get a popup notification that displays the results once the process has finished, click **[OK]** to finish.

Rollback results.

34 transactions rolled back.

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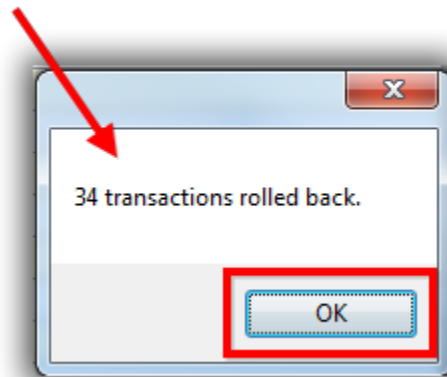
The final section of this article talks about how to view the **activity** of **specific fields** in the database.

#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

In my example I queried for my own contact record and opened it.

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.

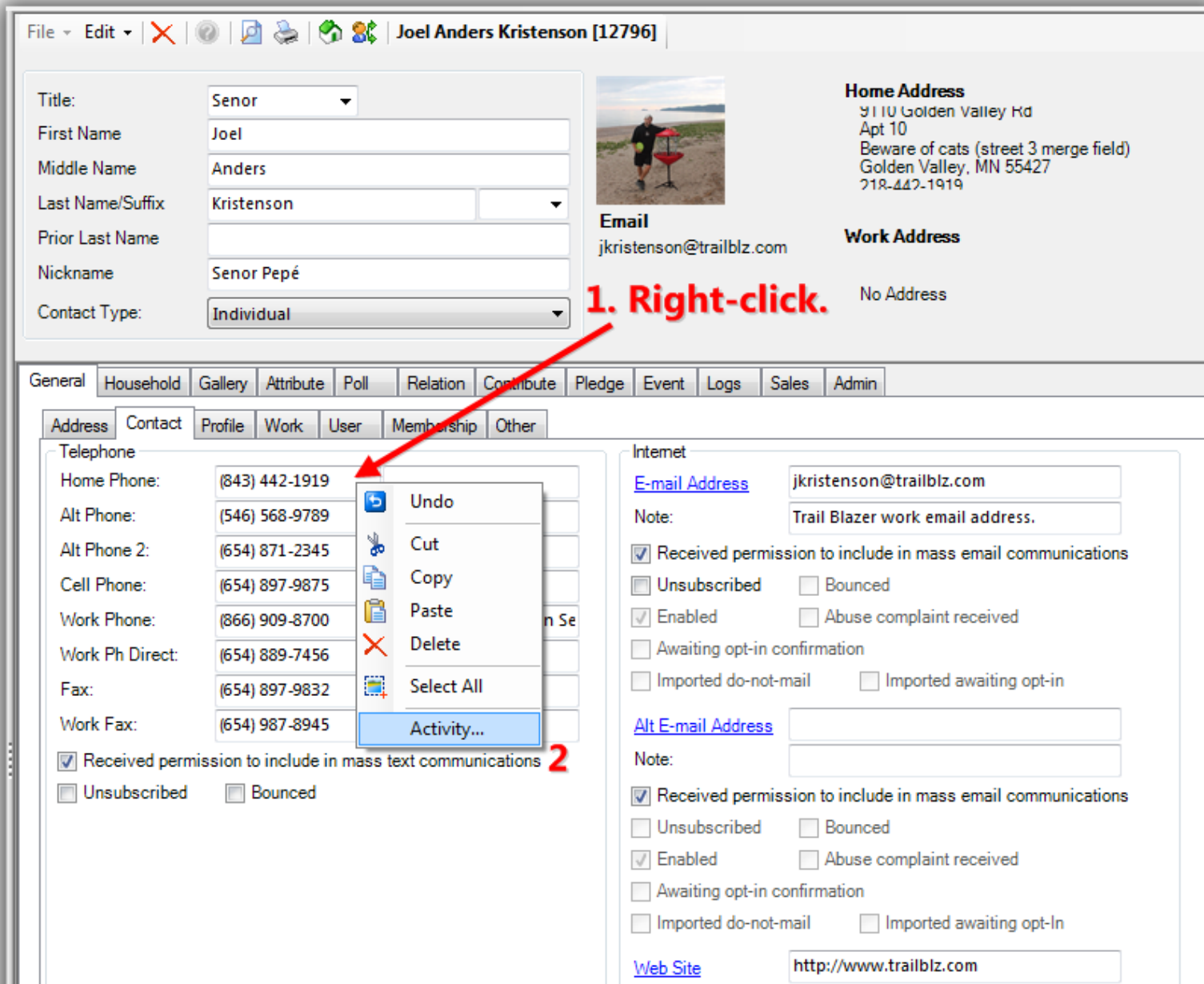**Locate the field** that you want to view the **activity** for, **right-click** in the field, and select **'Activity…'**. *In my example I performed this on a **home phone** field.*

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

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.

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

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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.

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.