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Overview

This article walks through the steps to **create new election cycles** in your database, set your **default**/previous/next cycles in your Committee record, and how to **mass update** a list of contributions to a specific election.

Tip: Use the **Ctrl+F** hot key to jump to different sections of this article (example: "**#1**", "**#2**" or "**Related Resources**".

<u>Outline</u>

#1 View your Current List of Election Cycles and Add New Ones



#2 Set Your 'Default', Previous, and Next Election Cycles in your Committee Record#3 Mass Update a List of Contributions to a Specific Election Cycle#4 Related Resources

<u>#1 – View your Current List of Election Cycles and Add New Ones</u>

Note: This article assumes you have <u>administrative access</u> for your database.

To check view your current list of elections follow Application Menu > System Manager > Lists > Elections







This will populate your current list of **Election Cycles** with related information. *In this example I had 24 elections, you can sort from oldest to newest by clicking on the 'ID' column two times.*



How to Mass Update a List of Contributions to a Specific Election – (For Political Customers)

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Elections list with my 24 example election cycles.

To sort your elections / from oldest to newest click on the 'ID' column.



You can click on any of the underline blue links in the list to **open an election** and make modifications if necessary, *example*:



Election record after it's been opened, with details related to the election.

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If you need to make changes to any of your current elections you can click on either of the blue hyperlinks.



To create a **new election** click the **[+ New]** button on the search tool strip.



Click the [+ New] button to begin creating a new election record.

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Under the **General** tab enter the election **Name, Cycle Start Date**, **Election Date**, and the **Election Type**. *The image below shows my example election called Primary 2018 with a cycle start date of 11/2/2016, and an election date of 9/1/2018.*

Fill out the details for your new election cycle under the General tab and click [Save].

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Navigate to the **Limits** tab and fill out the contribution limits for the election. *These can fluctuate as the FEC changes their rules so it's always a good idea to confirm with your FEC analyst what the current laws allow for.*

Fill out the contribution limits under the 'Limits' tab, check with your FEC analyst if you have questions on what the current laws are.

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If you want to activate the election for the mobile poll watching application you'll do that under the Poll Watch tab as shown below.

If you want to active the election for the mobile poll watching app you'll need to click the [Activate] button under this tab.





Once you're all finished creating your new election you can **save-and-close** it.

Click the [Search] button and you will now see your newly created election in your election list. Mine had an ID of 26.



Click [Search] to populate the list and display your new election.



The new election will display after clicking search and it will have the highest 'ID'.

Repeat these steps until all of the election cycles you need have been created.

<u>#2 – Set your 'Default', Previous, and Next Election Cycles in your Committee Record</u>

Under **Application Menu** follow **System Manager** > **Lists** > **Committee** and click on your **Committee Name** to open the Committee Record. *In my example my committee was called 'Demo Campaign Database – Joel'. *If you have more than one committee you'll need to select the one you need from your list that you want to configure election cycles for.*

How to Mass Update a List of Contributions to a Specific Election – (For Political Customers)

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Navigate to the **Dates and Elections** tab.

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Click the 'Current Election' drop-down and select the election you want set as your current election. In my example I used the new 2018 primary election that was created in the previous steps.

How to Mass Update a List of Contributions to a Specific Election – (For Political Customers)

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Select the elections from the drop-downs for your **Previous Election**, and **Next Election**. *In my example I set my 'Previous Election' to General 2016 and the 'Next Election' to General 2018.*

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How to Mass Update a List of Contributions to a Specific Election – (For Political Customers)

File - Edit - 📑 -	- @		
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New contributions that come into your database will now default to the 'current' election cycle that was configured in the Committee Record, whether they come in via an online donation, are mass imported, or hand entered. *My example is below for a hand-entered check contribution*.

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#3 – Mass Update a List of Contributions to a Specific Election

Note: Sometimes users will realize a bit late that their election has passed and they didn't update their 'current' cycle so contributions that are coming in are flagged for the incorrect election. Instead of going one record at a time to fix the issue you can mass update all of the contributions for the particular date period to the correct election cycle.

Important: Unlike modifying a single contribution record that's already deposited, the mass update procedure ***DOES NOT*** require that you <u>undeposit</u> it prior to running this operation, the contributions will update just fine without going through that extra effort. This is demonstrated below as some of my contributions had already been deposited prior to running the mass update.

Tip: It's a very wise decision to start a new session of Trail Blazer prior to running these mass updates, if you accidently make a mistake it will be easier to roll-it-back.

Navigate to the **Contributions** list by following **Application Menu** > **Voter** > **Contribution/Pledges** > **Contributions**

Run your search query for contributions that **are not set to the correct election**, this is usually run by a date range. In my example I queried for all contributions for my '**General 2016**' date-range of **11/5/2014 – 11/1/2016** and this populated a record count of **13**. As shown in the image below all of the contributions *should* be connected to the General 2016 election but many are not.

Run your search query for the list of contributions you need to mass update to the correct election cycle. (usually by the date range for a particual election)

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Many of the contributions in this list are not keyed to the correct election.

KNOWLEDGE BASE www.trailblz.com/kb

After your list of contributions have populated select File > Update Election...

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Choose the **election** from the drop-down, and click **[OK]**. In this example I selected the **General 2016 Election** which the contributions within this date-range were meant to be 'tied' to.

Trail Blazer will run the process to update the contributions with the election specified and will update you with a popup message when it's finished. Click **[OK]** to finish. *In my example all 13 contribution records were updated to the General 2016 election.*

Now you can click the **[Search]** button to refresh your list and you should notice that the **Election Name** has changed for all of the contribution records within your **grid**.

Click [Search] to refresh the list with the updated information.

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Repeat these steps as needed. It's not a bad idea to periodically run a search by your election(s) date ranges and verify that if you search by the 'just the election' in the drop-down menu that the counts are exactly the same. If they aren't you know that you'll have some cleanup to do.

- YouTube Channel
- Knowledge Base Articles

- 3rd Party Resources

Related Resources

Article: Add an Election to Your Trail Blazer DatabaseArticle: Setting the Time Zone in your Trail Blazer DatabaseArticle: Calculating cycle-to-date numbers for "Schedule A" Contribution entriesArticle: Creating and Filing Your First FEC ReportArticle: Add Elections for ContributionsArticle: Mass Update – Changing or Clearing FieldsArticle: How to Setup and Use the Mobile Poll Watching AppArticle: Polling – How to Setup and Run a Poll – Inside your Trail Blazer DatabaseArticle: Election Day Procedures | Poll WatchersVideo: Election Cycles Updates to Contribution Records (en masse)Video: Contribution – Entering Earmarked ContributionsVideo: Contribution – F3L Bundler or How to Track Who Brought in a DonationVideo: Mobile Canvassing

Trail Blazer Live Support

C Phone: 1-866-909-8700

- Email: support@trailblz.com
- **Facebook:** <u>https://www.facebook.com/pages/Trail-Blazer-Software/64872951180</u>
- **Twitter:** <u>https://twitter.com/trailblazersoft</u>

* 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.