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Overview

This article will show you how to tag a contact (donor/voter) record with a **Not** attribute, and how to find records that have the Not attribute assigned to them.

This mechanism comes with every **Trail Blazer** database and provides a way to **"hide"** contacts from your regular search results and reports. Some examples of this include:

- The person has passed away
- They no longer want to be contacted
- They haven't provided a donation in a long time but you still want to retain their data
- The record contains sensitive information that you may not want the average database users to view in their normal search queries, this is **not** as secure as <u>filtering the records</u> from their search queries

<u>Outline</u>

#1 Assigning a Not Attribute to a Record (Deceased, Do Not Contact, Etc.)



#2 Searching for Records that *Have the Not* Attribute#3 Related Resources

<u>#1 – Assigning a Record with a Not Attribute (Deceased, Do Not Contact, Etc.)</u>

Navigate to the Contacts (Voters/Donors) list.





Run a search query for the contact you want assign with a NOT attribute.



1. Build and run your search query for the contact you want to 'hide' with a NOT attribute.

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2. Click on the contact's name to open their record card. KNOWLEDGE BASE <u>www.trailblz.com/kb</u>



Navigate to the **Attributes** tab and expand the **Not** folder.



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Check the box for the **Not attribute item** you wish to assign. If you don't see an option that's relevant you'll need to <u>add a new attribute</u> item under the Not folder. *In my example I marked the person as deceased and recorded a brief note.*



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Click [Save and Close] to finish.



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If you **search** for the contact again they won't display as they are now hidden/archived with a Not attribute. *My example is below where I searched* for the person by their last name.



If you search for the contact again (by something like their name) they will not display in the search results as they are now 'hidden' with the Not attribute.

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The next section walks through the steps to **find** contacts who are **'hidden'** with a Not attribute.

<u>#2 – Searching for Records that *Have the NOT* Attribute</u>

Navigate to the Contacts (Voters/Donors) list.





Click on the **Attributes** tab and the **Exclude** sub-tab.



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Expand the Advanced Functions Tool Strip by clicking on the blue button to the lower-left of the Exclude sub-tab. Once it's expanded, disconnect it by 'unplugging' the tab.



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Once the Exclude tab is unplugged, navigate to the **Include** sub-tab, expand the **Not** folder, check the boxes you want to search by and click **[Search]**. *My example is below where I searched for all records tagged with the Do Not Contact and Deceased attributes.*



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If you open one of the contact records in your list you can verify which Not attribute(s) they have.



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The related resources below link to a variety of other useful articles and videos related to this topic.



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

Related Resources



Article: Creating an Attribute Folder and Attribute Items Article: How to Set an Attribute for All Members of a Household En Masse Article: Add Attributes, Attribute Dates, and Attribute Notes to the Grid by Formatting them in as a Columns Article: How to Remove an Attribute Item from a List of Contacts En Masse 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 Merge Attributes Article: Filter Database Access for Different Users by things like Address, a Saved Search Query, and a Specific Attribute Item Article: How to Mass Update a List of Contacts with an Attribute Item Article: Delete an Attribute Folder and an Attribute Item Article: Log Notes vs User Fields vs Attributes Video: Not Attribute Video: Attributes - Delete Video: Attributes – Adding New Video: Attributes – Assign en masse Video: Attributes - Add attribute dates and notes to your lists Additional Service: Trail Blazer NCOA Append (Address Refresh)

Trail Blazer Live Support

- C Phone: 1-866-909-8700
- Email: <u>support@trailblz.com</u>
- **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.