How to Use the NOT Attribute to Hide Donors and How to Find Them

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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 filtering the records from their search queries

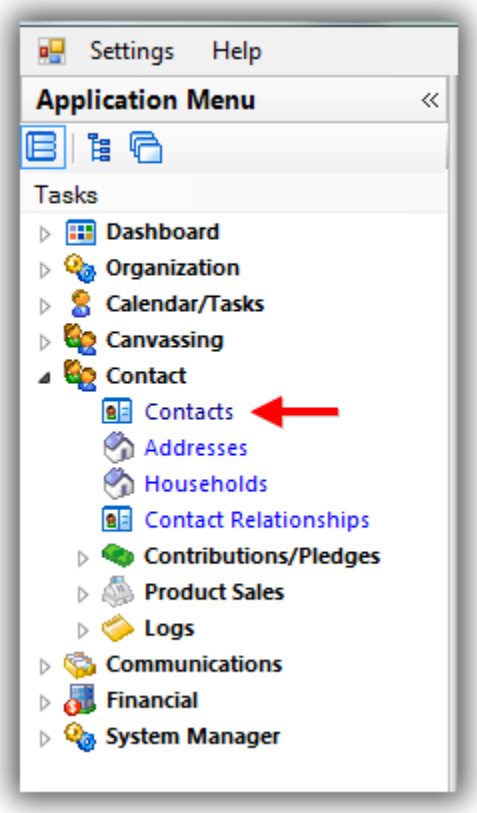
Outline

#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

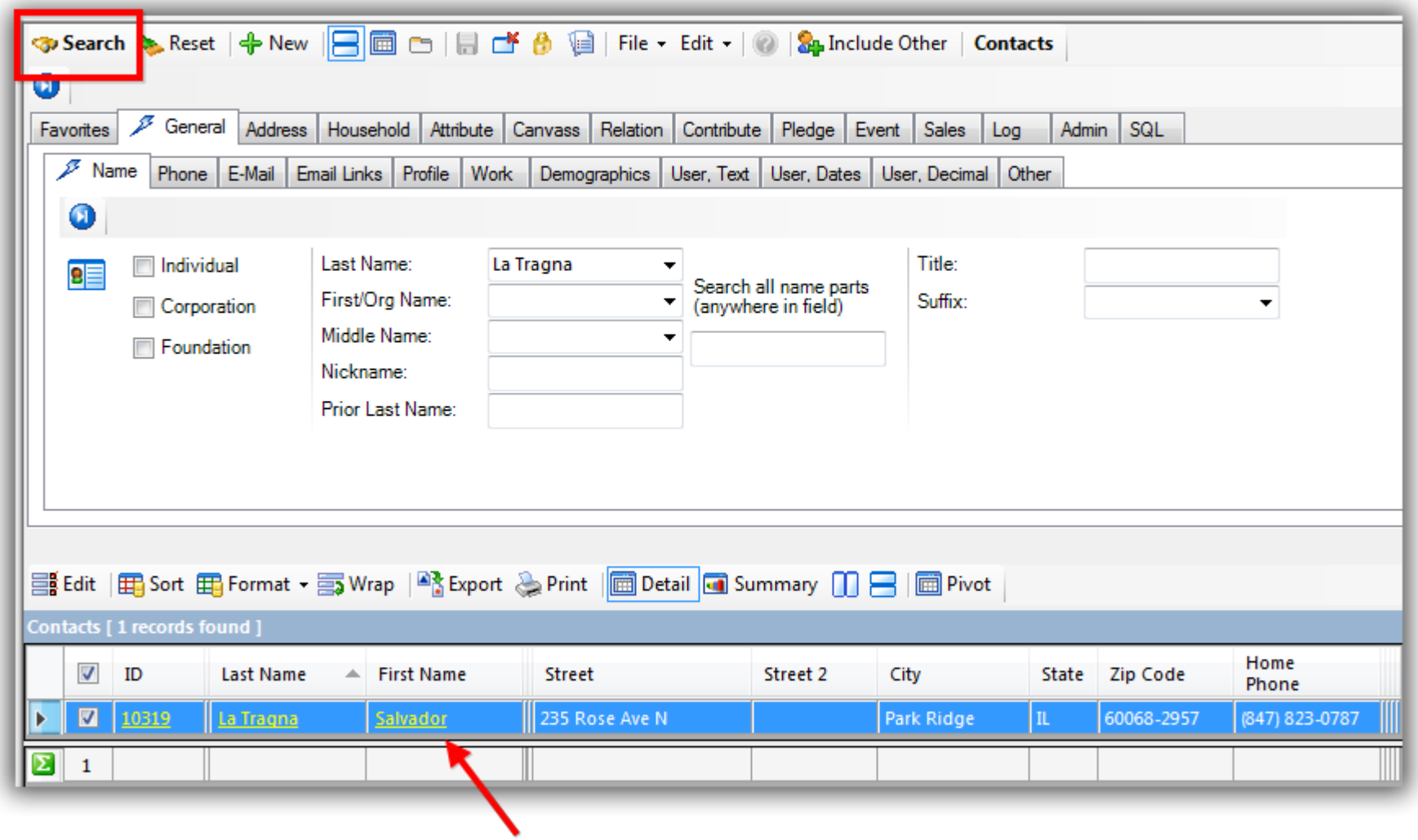
#1 – Assigning a Record with a Not Attribute (Deceased, Do Not Contact, Etc.)

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.



2. Click on the contact's name to open their record card.

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

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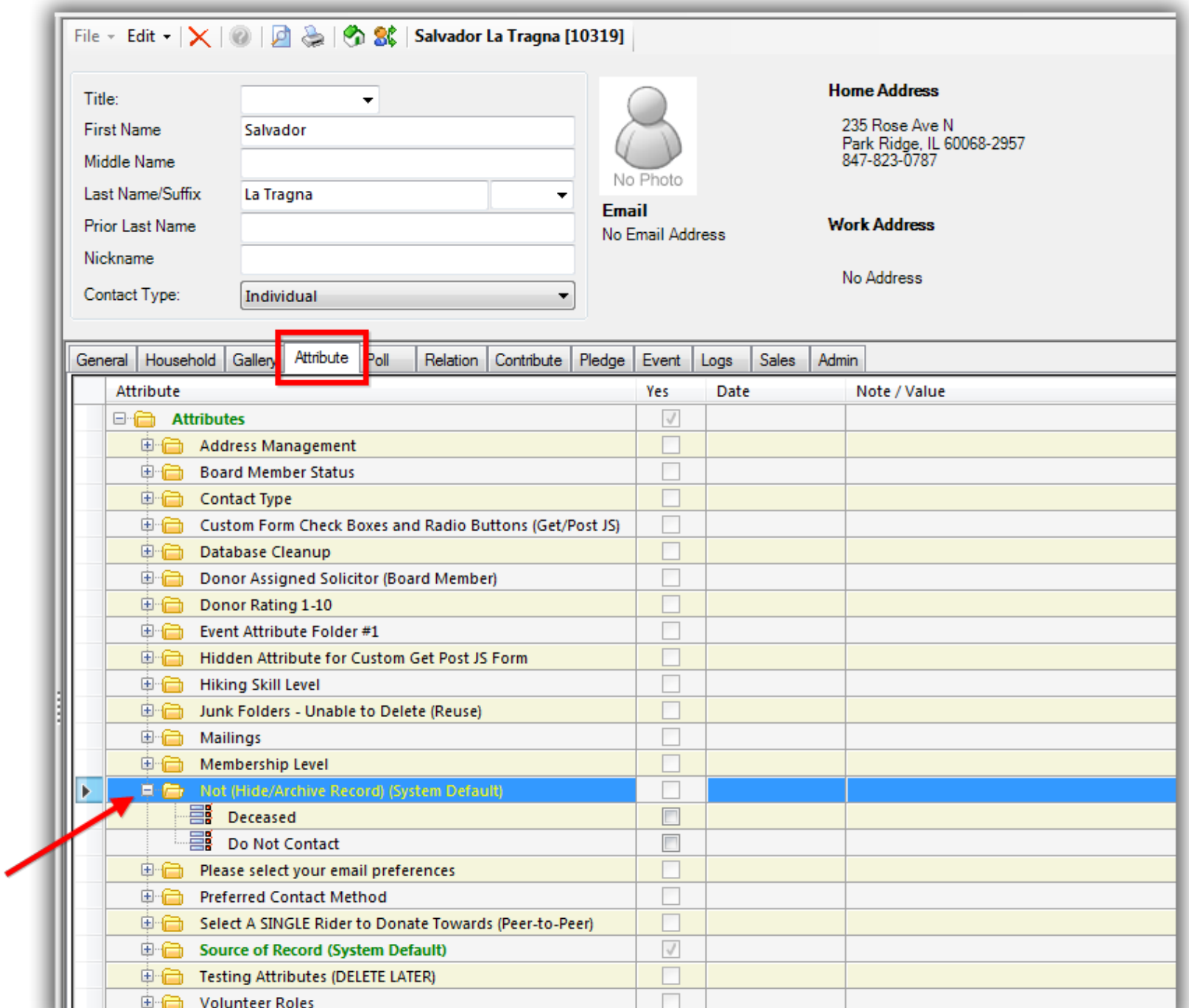

Check the box for the **Not attribute item** you wish to assign. If you don't see an option that's relevant you'll need to add a new attribute item under the Not folder. *In my example I marked the person as deceased and recorded a brief note.*

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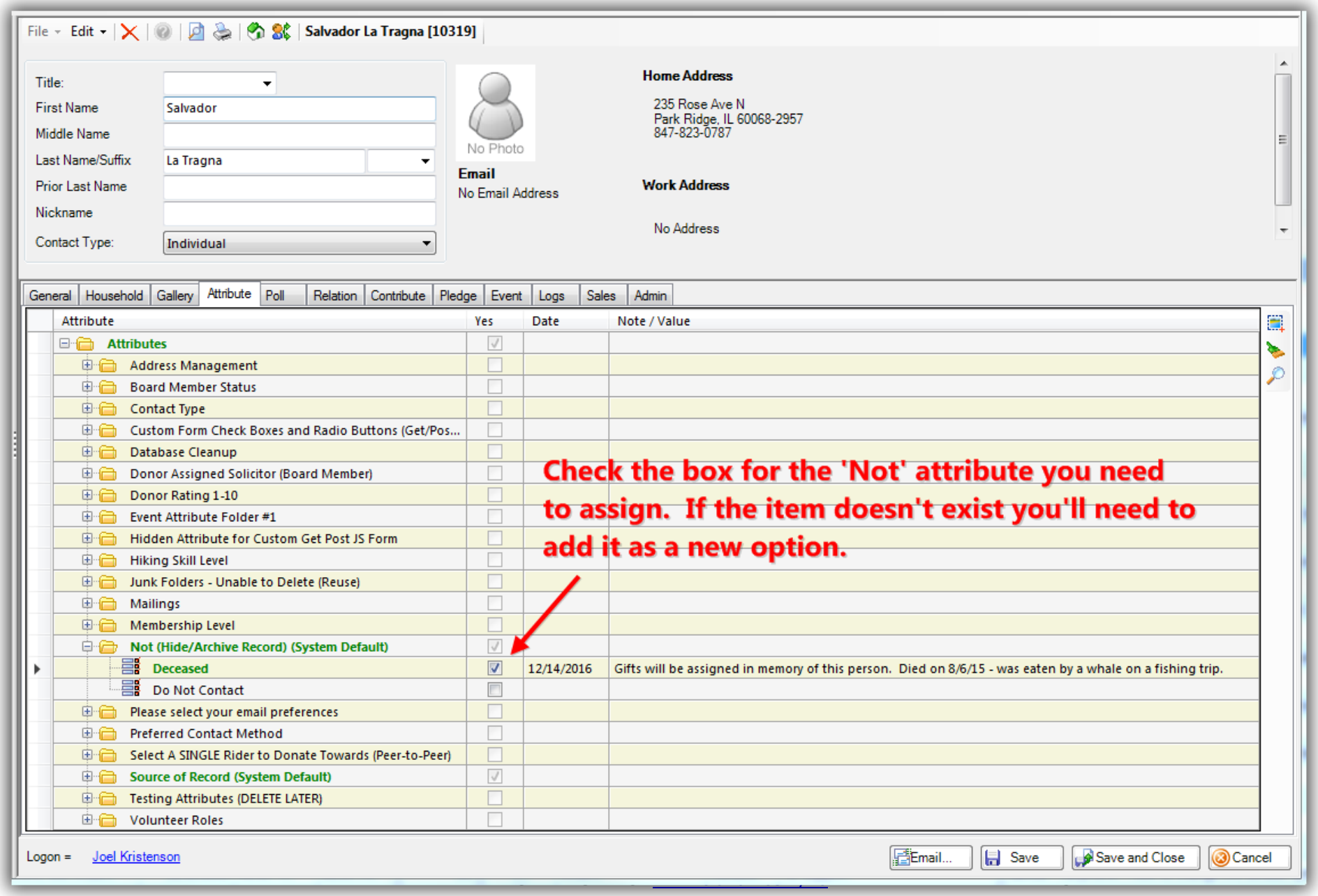

Click **[Save and Close]** to finish.

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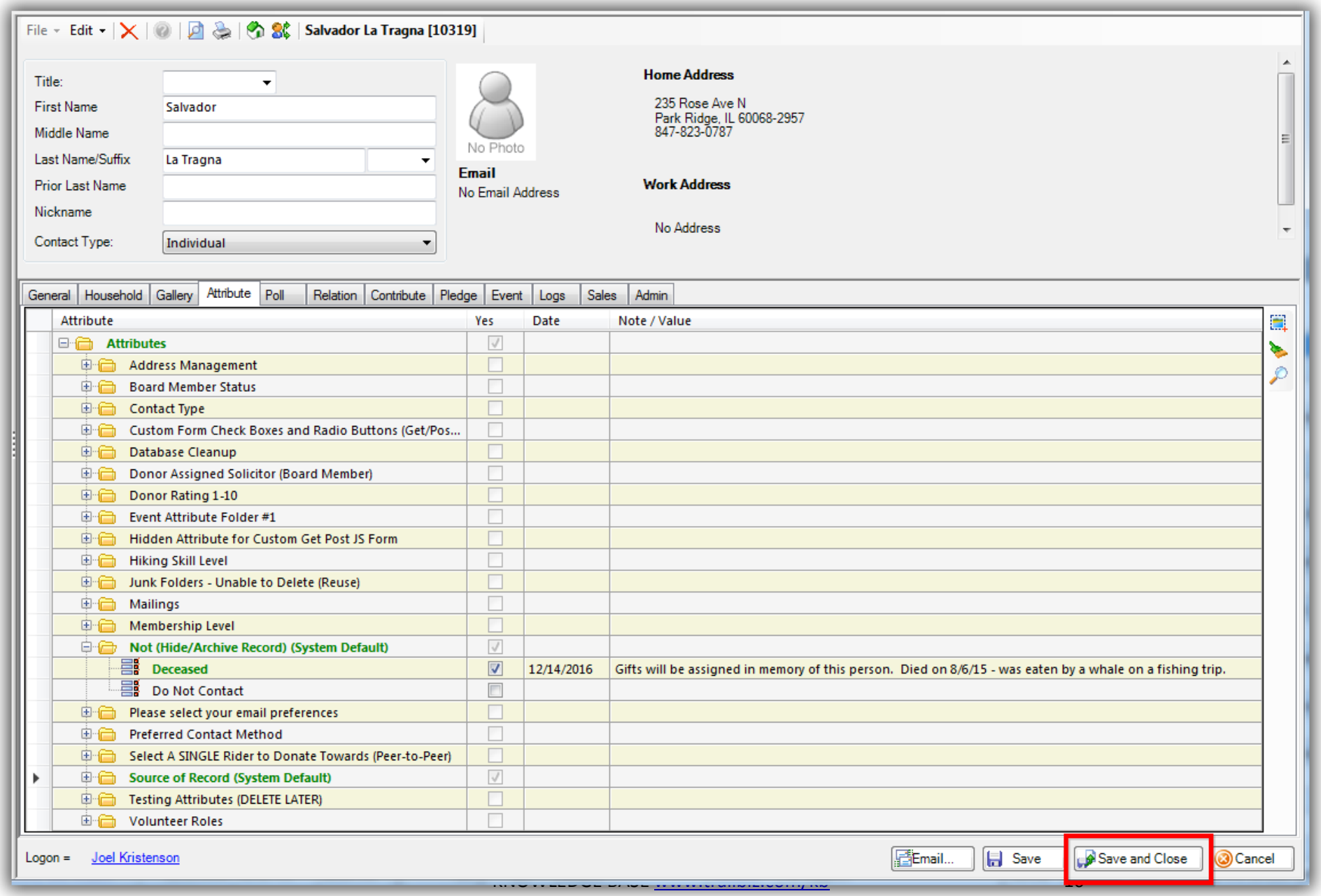
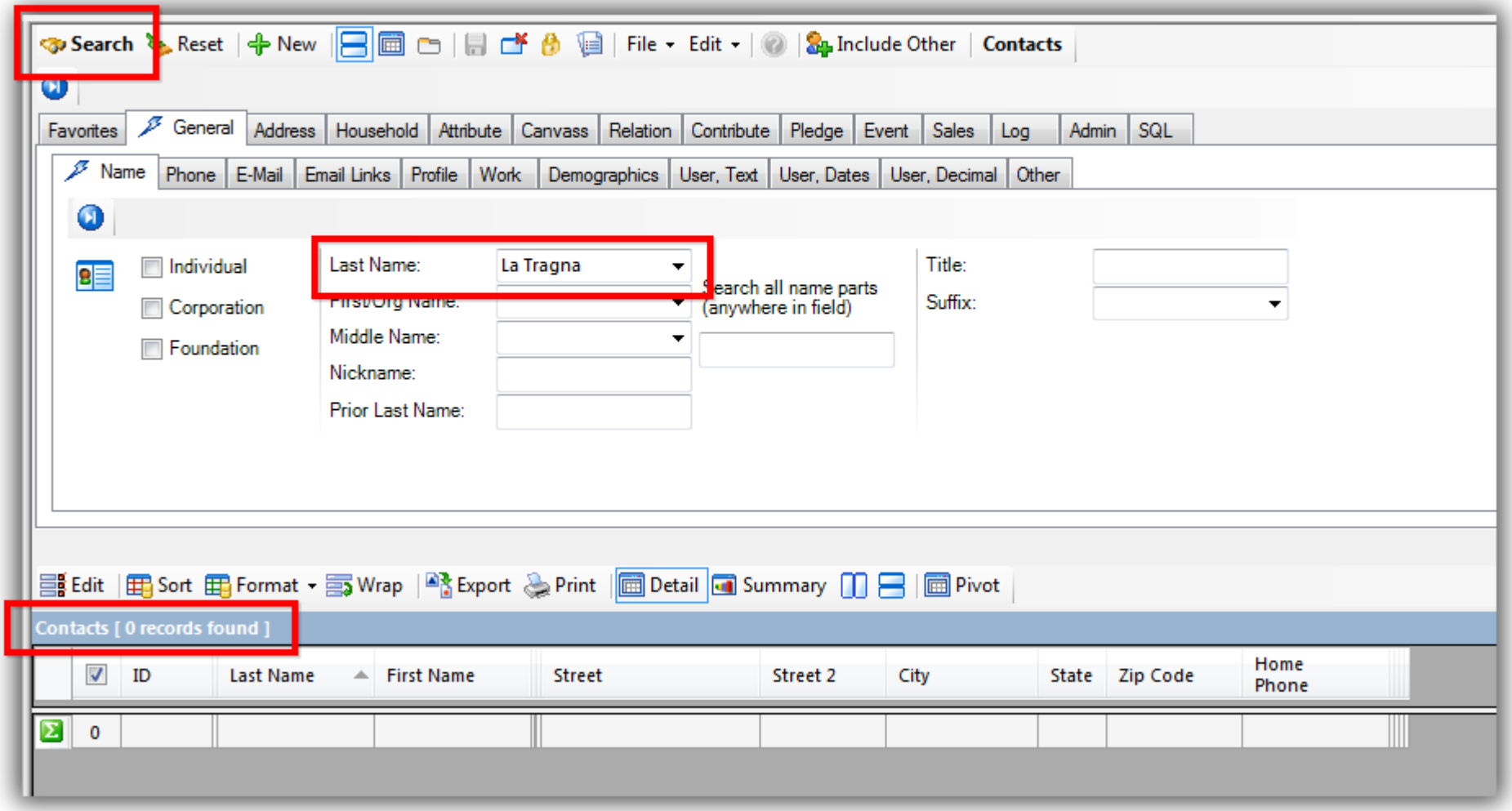


If you **search** for the contact again they won't display as they are now hidden/archived with a Not attribute. *My example is below where I searched for the person by their last name.*

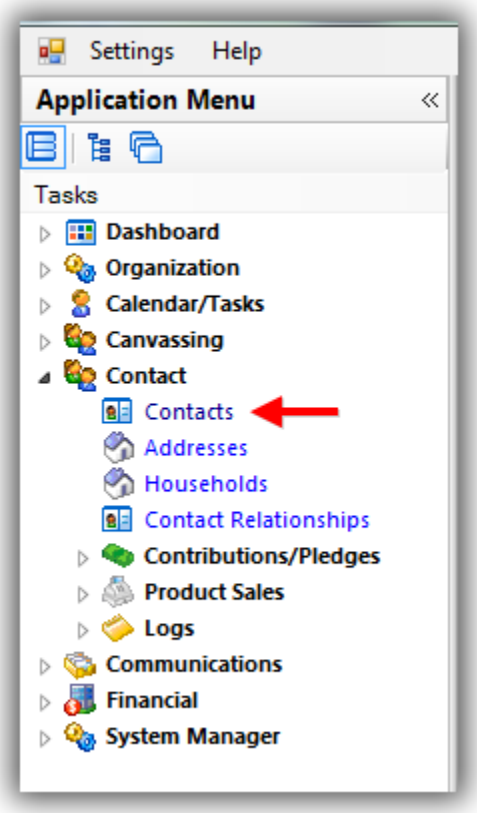
If you search for the contact again (by something like their name) they will not display in the search results as they are now 'hidden' with the Not attribute.



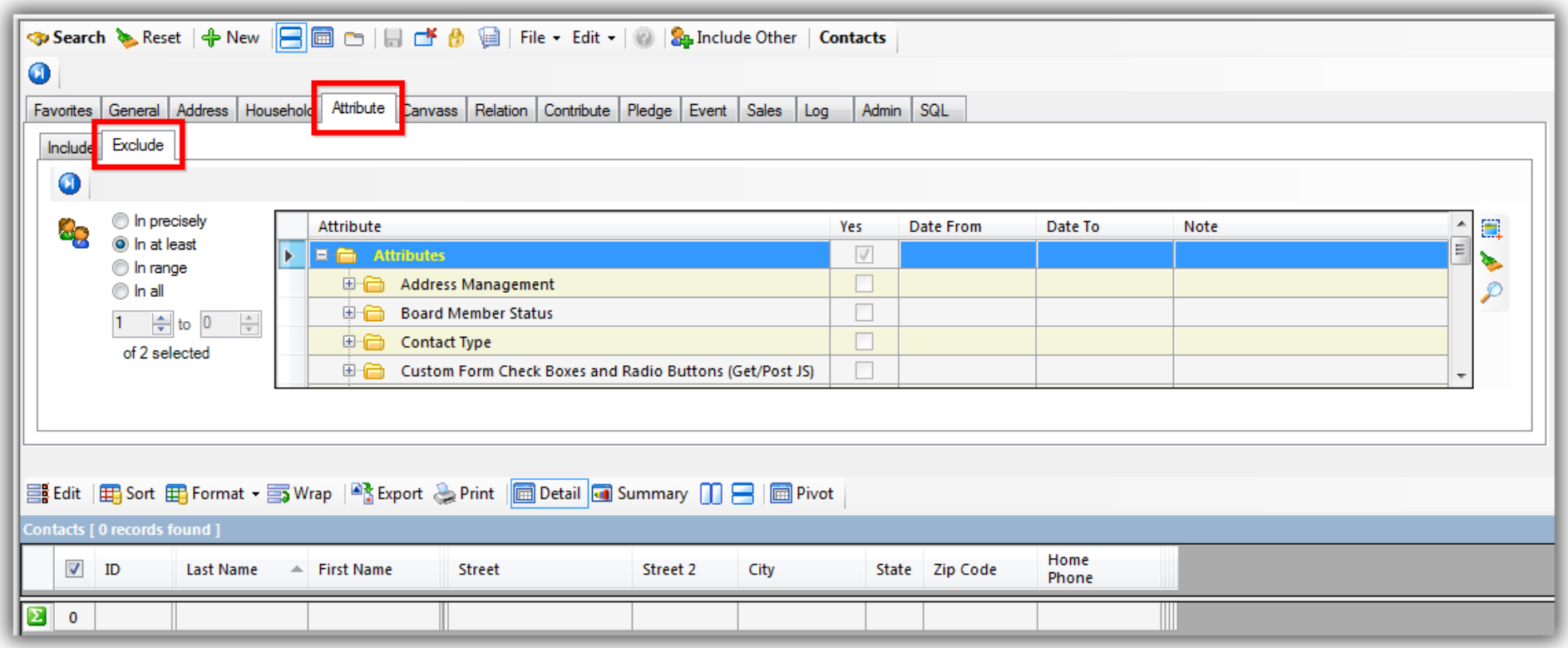
The next section walks through the steps to **find** contacts who are **'hidden'** with a Not attribute.

#2 – Searching for Records that *Have the NOT* Attribute

Navigate to the **Contacts** (Voters/Donors) list.



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

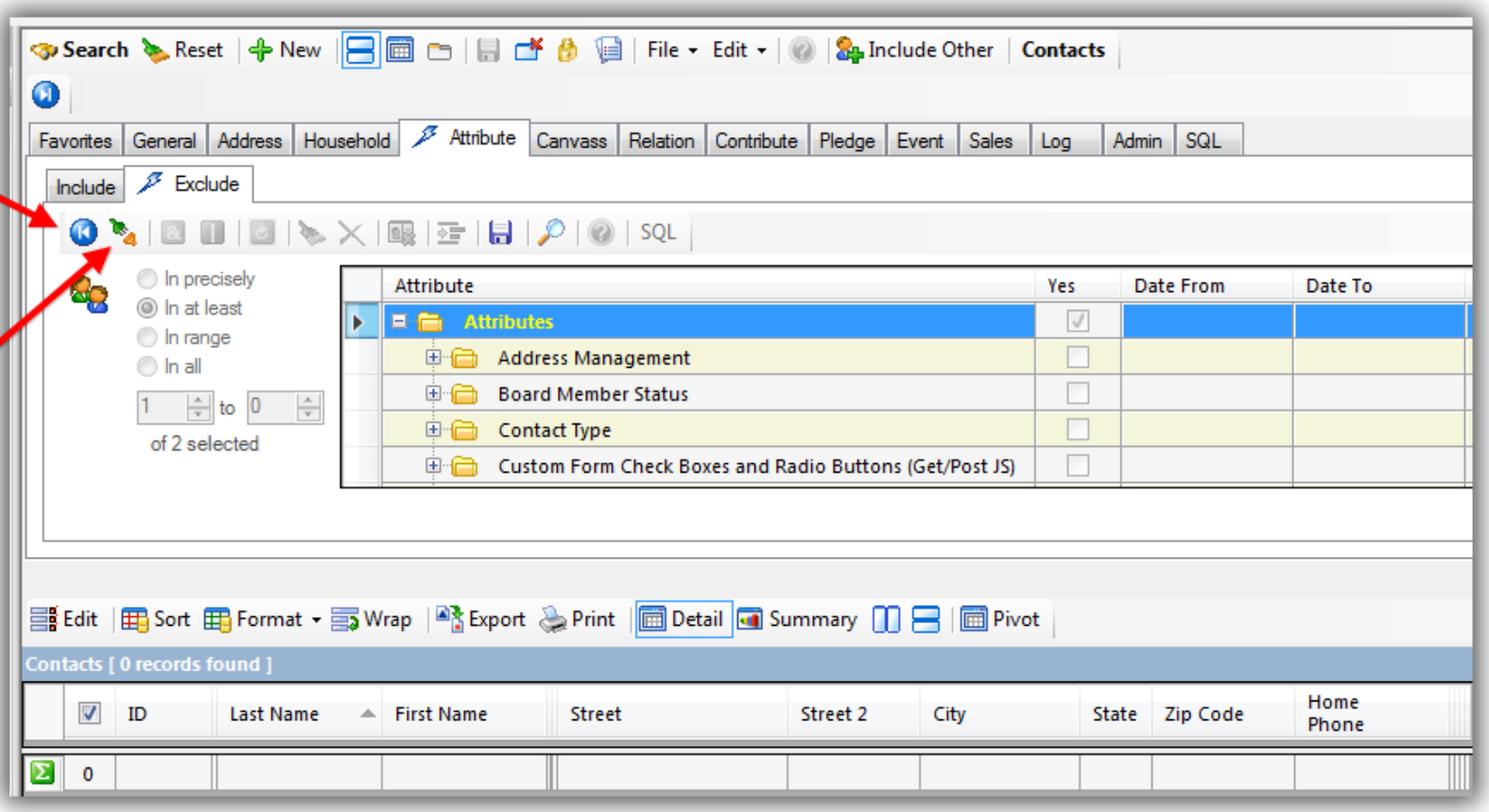


Expand the **Advanced Functions Tool Strip** by clicking on the **blue** button to the lower-left of the **Exclude** sub-tab. Once it's expanded, **disconnect** it by **'unplugging'** the tab.

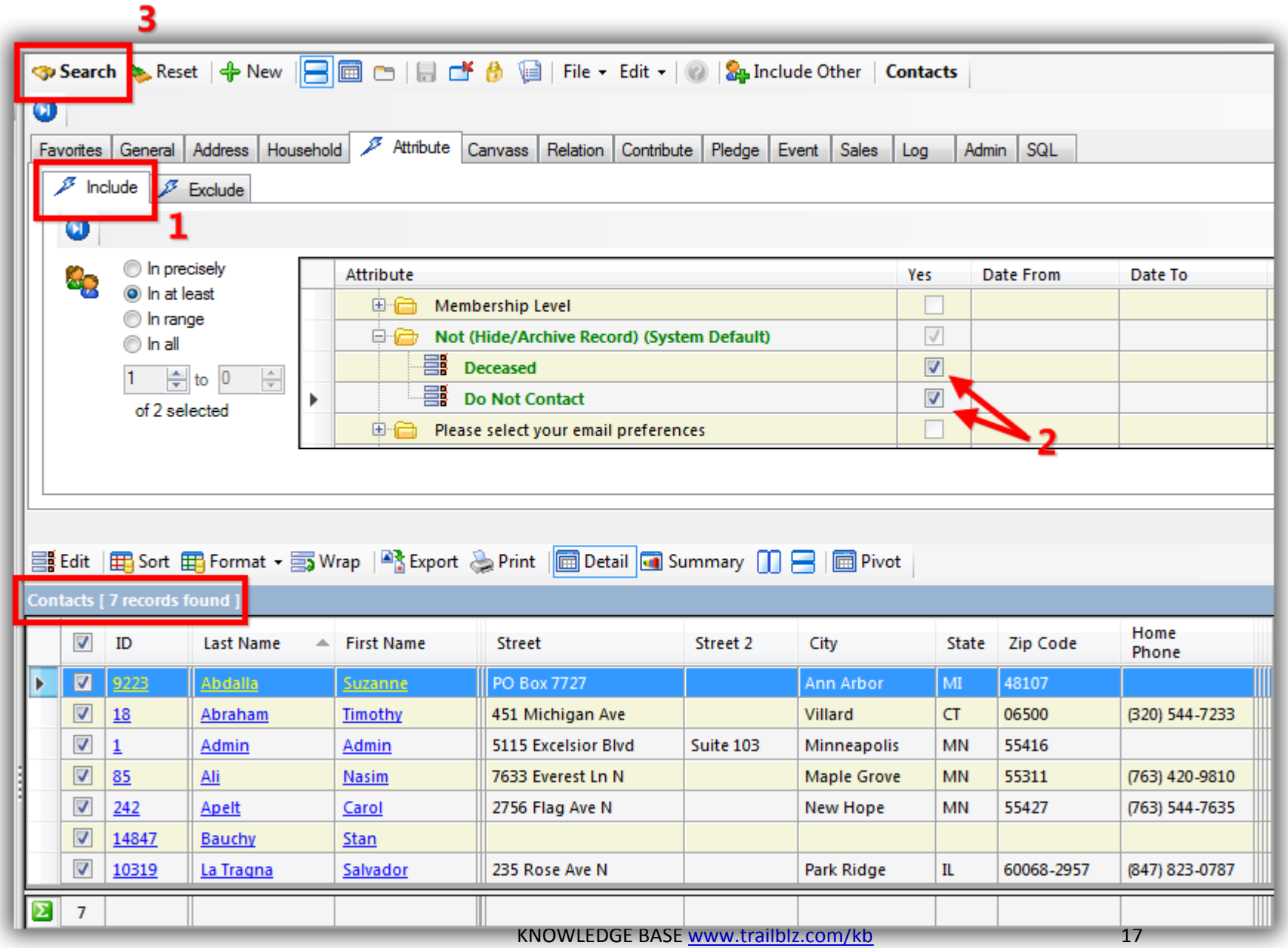
1. Expand the Advanced Functions tool strip.

2. Disconnect this tab.

By default this is always plugged in which hides anyone who is tagged with a Not attribute.



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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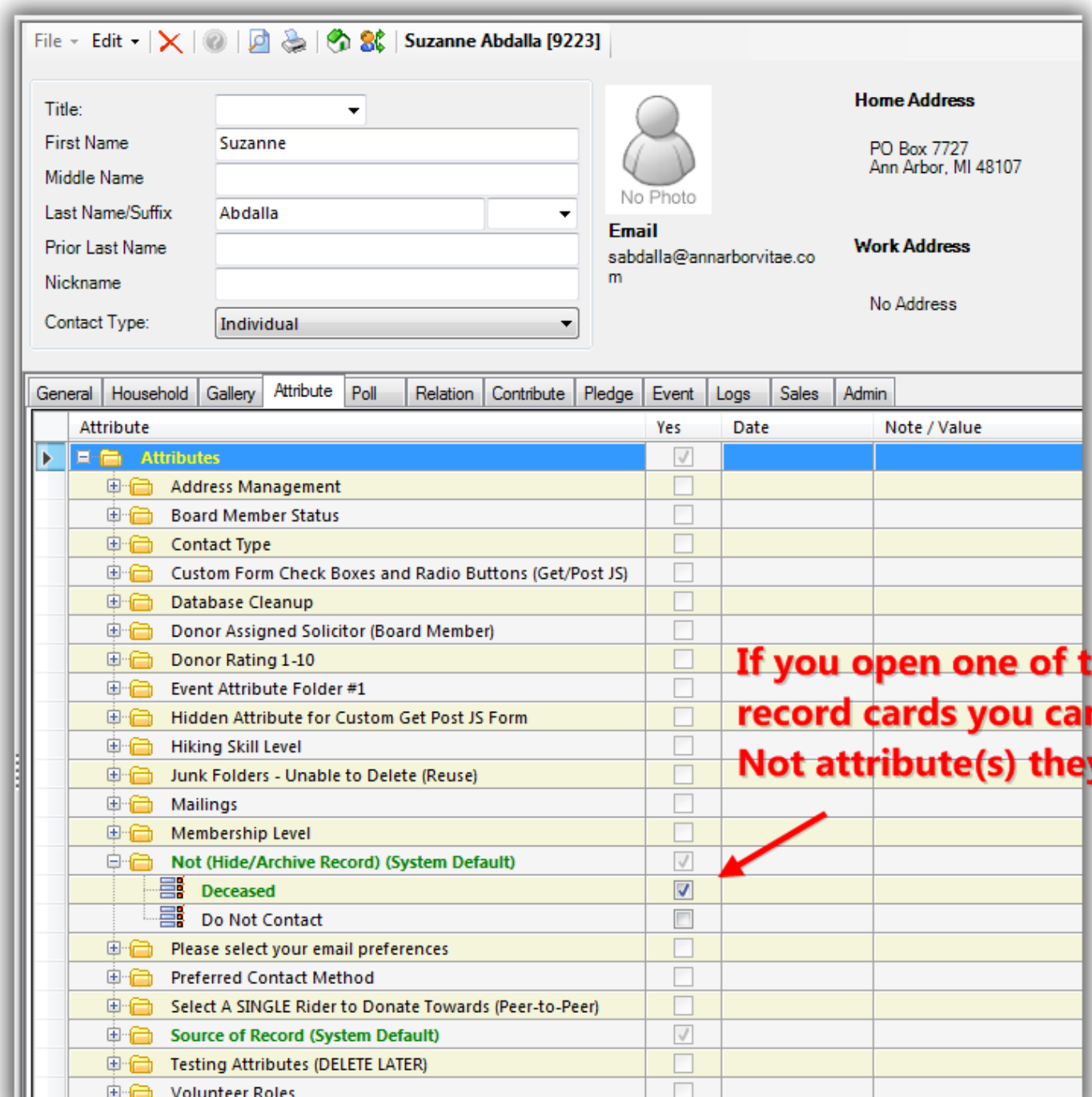
Search
Reset
New
File
Edit
Include Other
Contacts
Favorites
General
Address
Household
Attribute
Canvass
Relation
Contribute
Pledge
Event
Sales
Log
Admin
SQL
Include
Exclude
1
In precisely
In at least
In range
In all
1
to
0
of 2 selected
Attribute
Yes
Date From
Date To
Membership Level
Not (Hide/Archive Record) (System Default)
Deceased
Do Not Contact
Please select your email preferences
2
Edit
Sort
Format
Wrap
Export
Print
Detail
Summary
Pivot
Contacts [7 records found]
ID
Last Name
First Name
Street
Street 2
City
State
Zip Code
Home Phone
9223 Abdalla Suzanne PO Box 7727 Ann Arbor MI 48107
18 Abraham Timothy 451 Michigan Ave Villard CT 06500 (320) 544-7233
1 Admin Admin 5115 Excelsior Blvd Suite 103 Minneapolis MN 55416
85 Ali Nasim 7633 Everest Ln N Maple Grove MN 55311 (763) 420-9810
242 Apelt Carol 2756 Flag Ave N New Hope MN 55427 (763) 544-7635
14847 Bauchy Stan
10319 La Tragna Salvador 235 Rose Ave N Park Ridge IL 60068-2957 (847) 823-0787
7

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



If you open one of the contact's record cards you can verify which Not attribute(s) they have.

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

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

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