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## Overview

This article walks through the steps to create a **printable Call Book Report** (sometimes called an **Outbound Calling Report** or a **Trip Report**). This is used for your **fundraising** and **prospecting** needs when making phone calls (*sometimes this report is used for other purposes as well*).

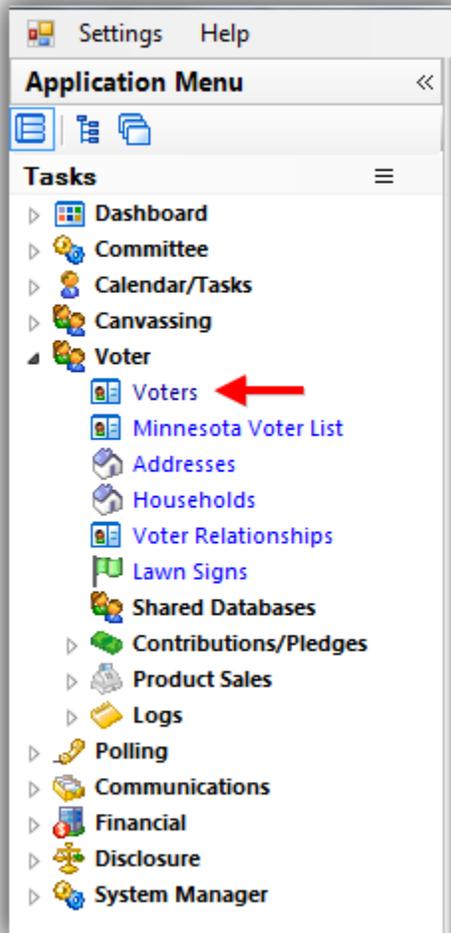
Call books provide an in-depth **summary** of **data** (e.g. **contribution history**, **log note** interactions, **attributes**, **user** fields, and **contact info**), for the list of **contacts** (voters/donors/prospects) that you **search for**. Call books are typically used for fundraising calls so the person making the call (usually the candidate or a board member) has a good understanding of who they're talking to and they can jot down notes on the call book during/after the call.

The article first shows how to **target a list** of contacts to call, how to **generate** the built-in "**report**", **configure** the report options, and it provides an *example* of how a final **print preview** looks.

 **Tip:** You can use our [mobile app](#) to look up contacts **on the go** and view things like **contact info**, **address**, **giving history**, **email/phone number**, and **record/view log notes**. This can be useful for someone who wants to make calls to donors but doesn't have their laptop with, but it does require appropriate [security access](#).

## Steps

Navigate to the **Voters/Donors** list under the **Application Menu**. *For the purpose of this article I used the **political version**.*



**Build** and **run** your [search query](#) for the list of contacts you want to generate a call book report for. *In my example I searched for all voters who contributed to my general 2016 election which produced 528 results.*

**Build and run a search query for the list of contacts you want to generate a call book report for.**

**Search** | Reset | New | File | Edit | Include Other | Voters

Favorites | General | Address | Household | Vote History | **Attribute** | Canvass | Poll | Relation | Lawn Sign | **Contribute** | Pledge | Event | Sales | Log | Admin | SQL

**Contribute** | Marketing Notion

**Committees**

- ACME for America
- Demo Campaign Database - Joel
- Kathryn For Congress

Date Range: <custom, according to dates below>

Election: General 2016

Event: <ignore>

Amount Range: minimum to maximum

Awaiting Thank-You Letters

Awaiting Thank-You Phone Call

Payment Method: <ignore>

FEC Type: <ignore>

Single Contribution

**results**

Voters [ 528 records found ]

ID	Last Name	First Name	Address Type	Street	Street 2	City	State	Zip Code	Birth Date	Gender	County	CD	SD	LD	Reg Id
4	Aaberg	Marjory		504 8th St E		Starbuck	MN	56381	1/1/1961	F	Pope	07	13	13A	1512013
8	Aalgaard	Heather		6600 32nd Ave N		Crystal	MN	55427	1/1/1977	F	Hennepin	05	45	45B	3457082
405	Alfred	Tyrone		2155 Brunswick Ave N		Golden Valley	MN	55422	1/1/1948	M	Hennepin	05	45	45B	1010800
448	Larsen	Kristen		7573 Inman Ave S		Cottage Grove	MN	55016	1/1/1980	F	Washington	02	54	54A	3028117
597	Amstutz	Carl		6527 Hampshire Pl		Golden Valley	MN	55427	1/1/1986	M	Hennepin	05	45	45B	3739997
740	Anderson	Charlotte		6280 Louisiana Ct N	Apt D	Brooklyn Park	MN	55428	1/1/1931	F	Hennepin	03	40	40A	1147159
1380	Apelt	Scott		2756 Flag Ave N		New Hope	MN	55427	1/1/1900	M	Hennepin	05	45	45B	1148469
2074	Balster	Jeremy		112 Sunrise Cir		Adrian	MN	56110	1/1/1978	M	Nobles	01	22	22B	3606665
2267	Barry	Jill		3225 Xenia Ave N		Crystal	MN	55422	1/1/1961	F	Hennepin	05	45	45B	959807
2319	Bartholow	Clayton		5124 51st Ave N		Crystal	MN	55429	1/1/1951	M	Hennepin	05	45	45A	972174
2407	Bathke	Jon		5106 50th Ave N		Crystal	MN	55429	1/1/1953	M	Hennepin	05	45	45A	3457099
2772	Beisell	Colleen		6811 47th Ave N		Crystal	MN	55428	1/1/1954	F	Hennepin	05	45	45A	930140
3152	Berge	Deanna		5300 Louisiana Ave N	Apt 526	Crystal	MN	55428	1/1/1947	F	Hennepin	05	45	45A	950099
3860	Shinnick	Martha		5920 Hampshire Ave N		Crystal	MN	55428	1/1/1958	F	Hennepin	05	45	45A	997133
3890	Garcia-Luna	Cari-ana		1473 Idaho Ave S		St Louis Park	MN	55426	1/1/1982	M	Hennepin	05	46	46A	3446659
4026	Bodle	Terry		5525 Vera Cruz Ave N		Crystal	MN	55429	1/1/1946	M	Hennepin	05	45	45A	1154561
4138	Bohnenstingel	Esther		4465 Trenton Ln N	Apt 109	Plymouth	MN	55442	1/1/1922	F	Hennepin	03	45	45A	1180055
4731	Brandes	Sheila		3835 Orleans Ln N		Plymouth	MN	55441	1/1/1964	F	Hennepin	03	45	45A	1307871
5153	Brookins	Curtis		4725 Marie Ln E		Golden Valley	MN	55422	1/1/1954	M	Hennepin	05	45	45B	1227009
5192	Brostrom	Wendy		4020 Oregon Ave N		New Hope	MN	55427	1/1/1970	F	Hennepin	05	45	45A	879024
6397	Carlson	Willis		4107 Jordan Ave N		New Hope	MN	55427	1/1/1978	M	Hennepin	05	45	45A	535242
6405	Carlton	Andrew		6150 Quinwood Ln N	Apt 5114	Plymouth	MN	55442	1/1/1977	M	Hennepin	03	44	44A	1560577
6570	Caspers	Paula		4708 Gettysburg Ave N		New Hope	MN	55428	1/1/1957	F	Hennepin	05	45	45A	969489
6815	Chase-Johnson	Kathy		4215 Rhode Island Ave N	Apt 202	New Hope	MN	55428-4...	1/1/1958	F	Hennepin	05	45	45A	970314

Click **File > Reporting > Call Book Report...**

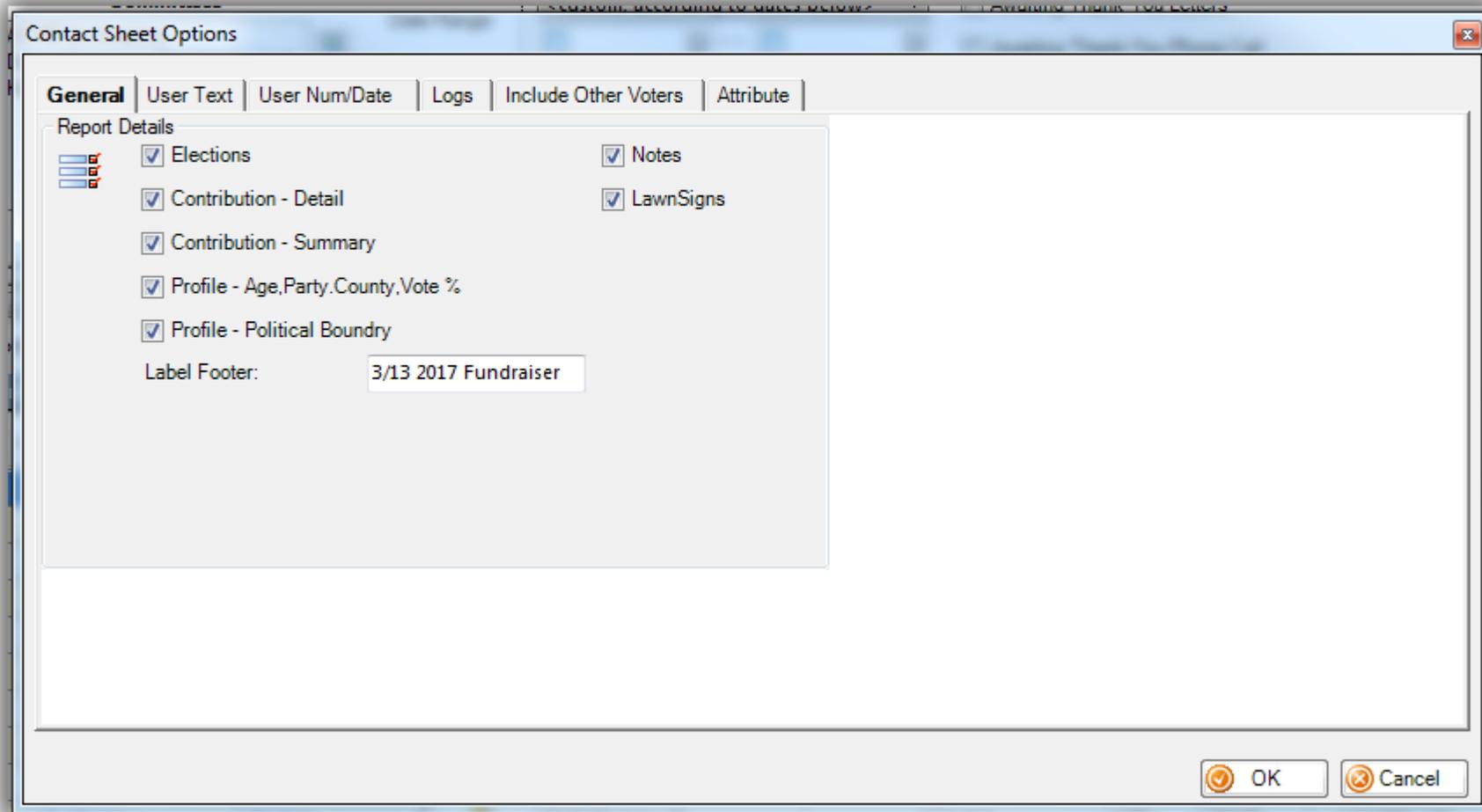
The screenshot shows the TrailBlazer software interface. The 'File' menu is open, and 'Call Book Report...' is highlighted. A red arrow points to the 'File' menu, and another red arrow points to the 'Call Book Report...' option. A tooltip above the option says 'Create a printable call book'. The interface includes a search bar, navigation tabs (General, Address, Household, Vote History, Attributes), a 'Contribute' section with a 'Marketing Notion' tab, a 'Committees' list, and various filters for Date Range, Election, Event, Amount Range, Payment Method, and FEC Type. At the bottom, there is a table of voters with 528 records found.

ID	Last Name	First Name	Address Type	Street	Street 2	City	State	Zip Code	Birth Date	Gender	County
4	Aaberg	Marjory		504 8th St E		Starbuck	MN	56381	1/1/1961	F	Pope
8	Aalgaard	Heather		6600 32nd Ave N		Crystal	MN	55427	1/1/1977	F	Hennepin
405	Alfred	Tyrone		2155 Brunswick Ave N		Golden Valley	MN	55422	1/1/1948	M	Hennepin
448	Larsen	Kristen		7573 Inman Ave S		Cottage Grove	MN	55016	1/1/1980	F	Washington
597	Amstutz	Carl		6527 Hampshire Pl		Golden Valley	MN	55427	1/1/1986	M	Hennepin
740	Anderson	Charlotte		6280 Louisiana Ct N	Apt D	Brooklyn Park	MN	55428	1/1/1931	F	Hennepin
1380	Apelt	Scott		2756 Flag Ave N		New Hope	MN	55427	1/1/1900	M	Hennepin
2074	Balster	Jeremy		112 Sunrise Cir		Adrian	MN	56110	1/1/1978	M	Nobles
2267	Barry	Jill		3225 Xenia Ave N		Crystal	MN	55422	1/1/1961	F	Hennepin
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3152	Berge	Deanna		5300 Louisiana Ave N	Apt 526	Crystal	MN	55428	1/1/1947	F	Hennepin
3860	Shinnick	Martha		5920 Hampshire Ave N		Crystal	MN	55428	1/1/1958	F	Hennepin
3890	Garcia-Luna	Cari-ana		1473 Idaho Ave S		St Louis Park	MN	55426	1/1/1982	M	Hennepin

Work your way through the different **tabs** to **configure** all the **options** you want to **print out** on your call book report. I've detailed my *example* below for each tab using 6 screenshots.

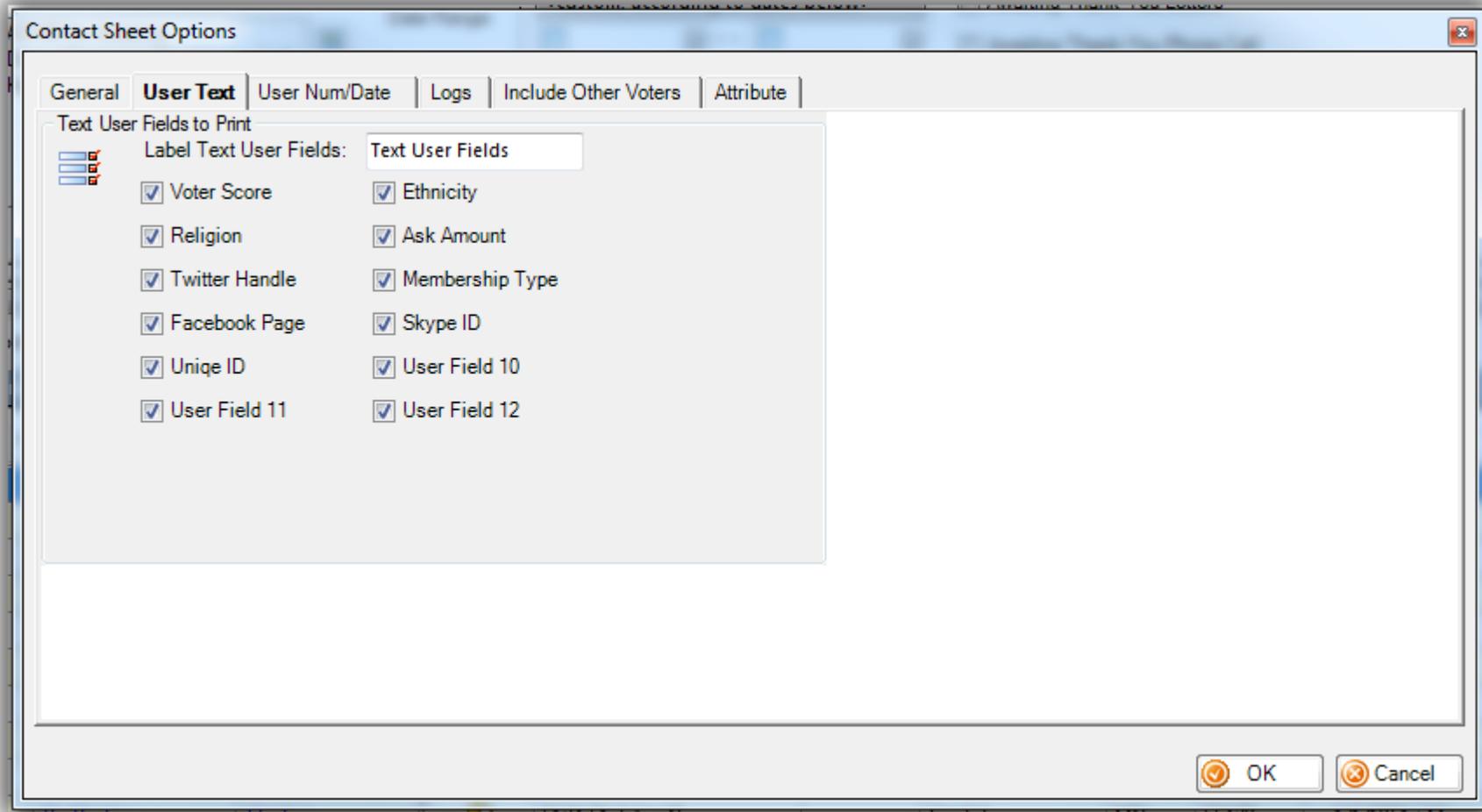
Img 1 of 6 – General

**Under the General tab you configure some of the main details to print out like: contributions, elections, age, notes, etc. You can also create a custom 'footer' for the call book report.**



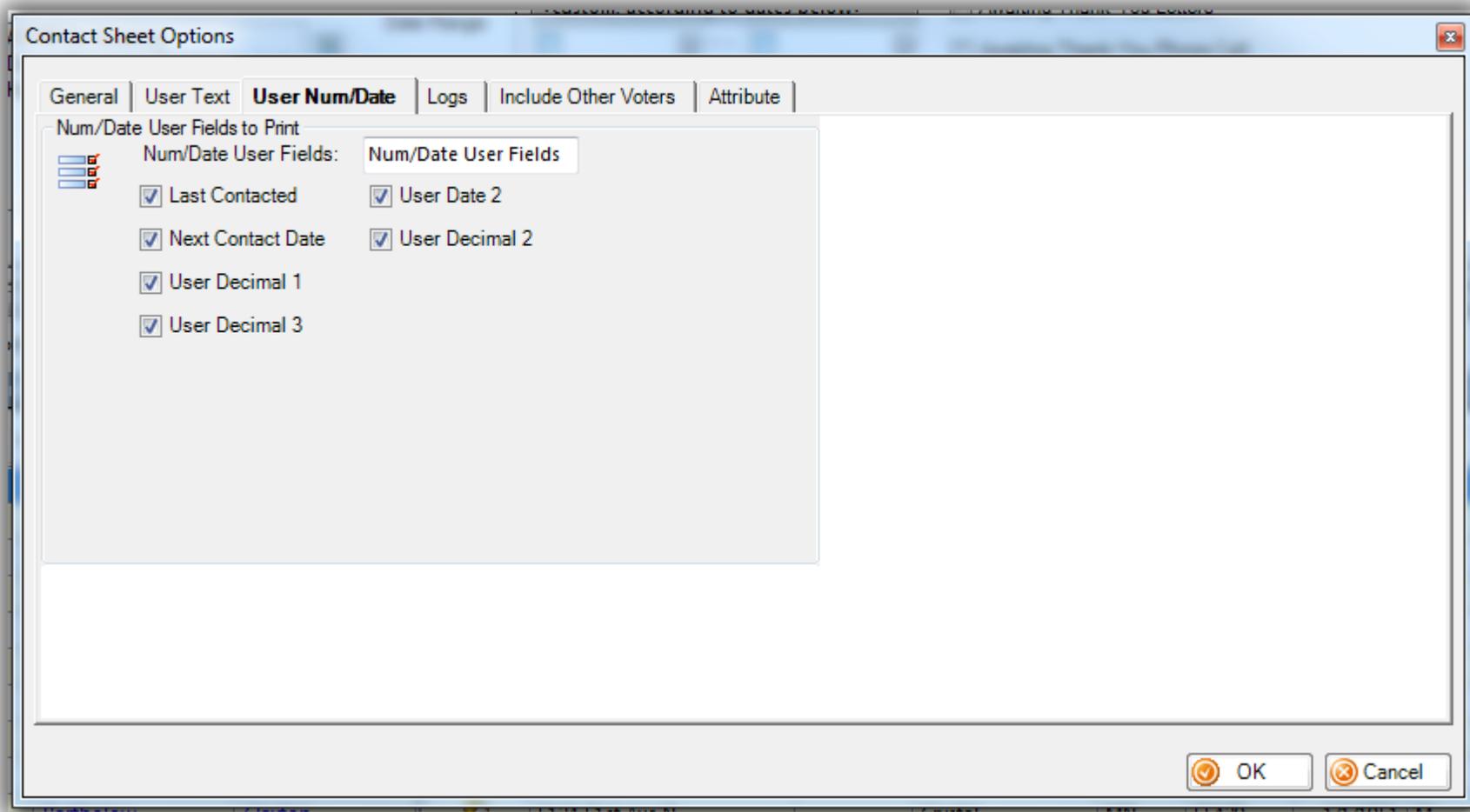
Img 2 of 6 – User Text

**Under the User tab you can turn certain user fields on or off.**



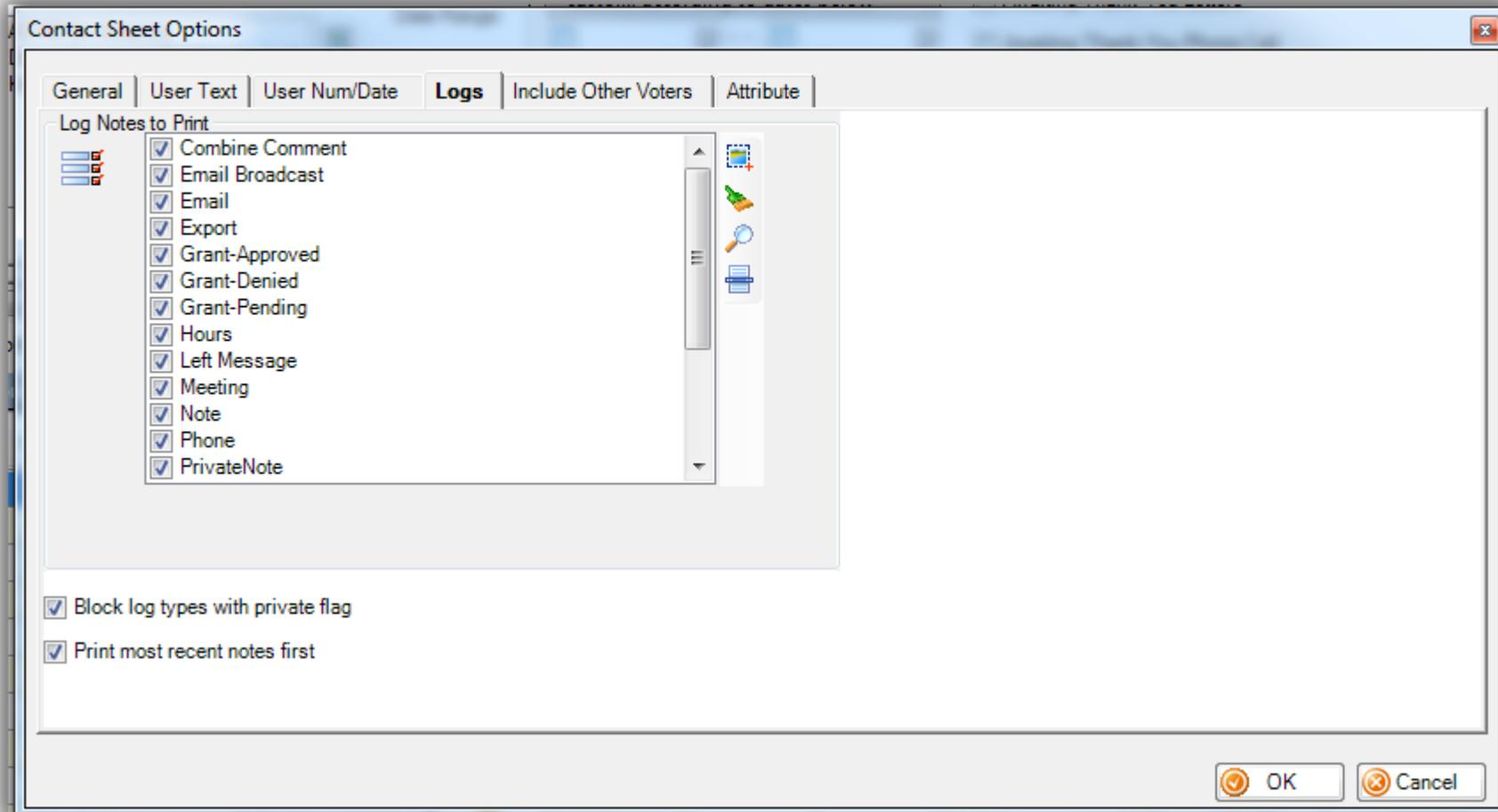
Img 3 of 6 – User Num/Date

**Under the User Num/Date tab you can turn custom decimal and date user fields on or off.**



Img 4 of 6 – Logs

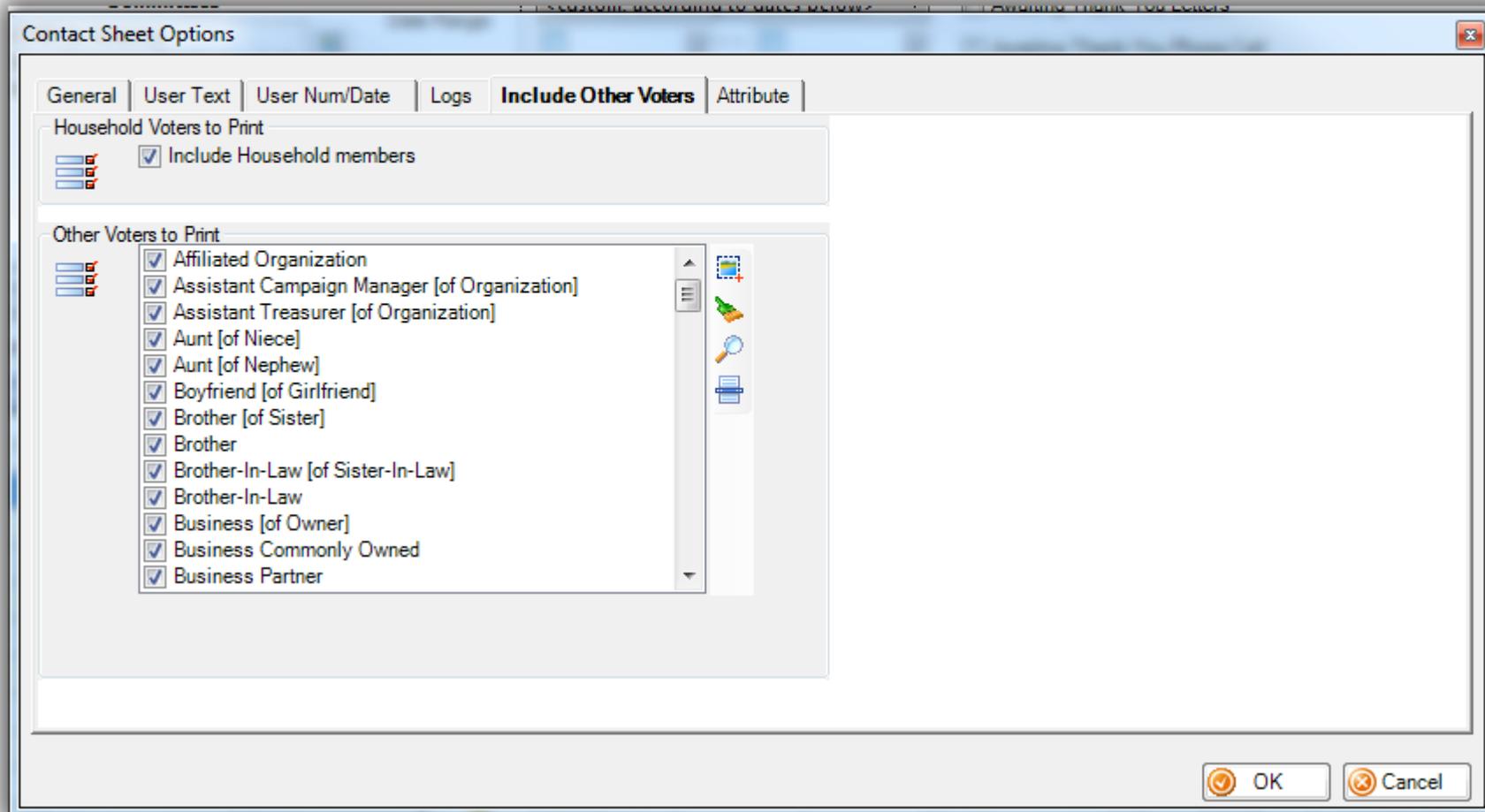
**Under the Logs tab you can turn specific log types on or off as well as configure the sort order and choose if you want hide 'private' log notes.**



Img 5 of 6 – Include Other Voters

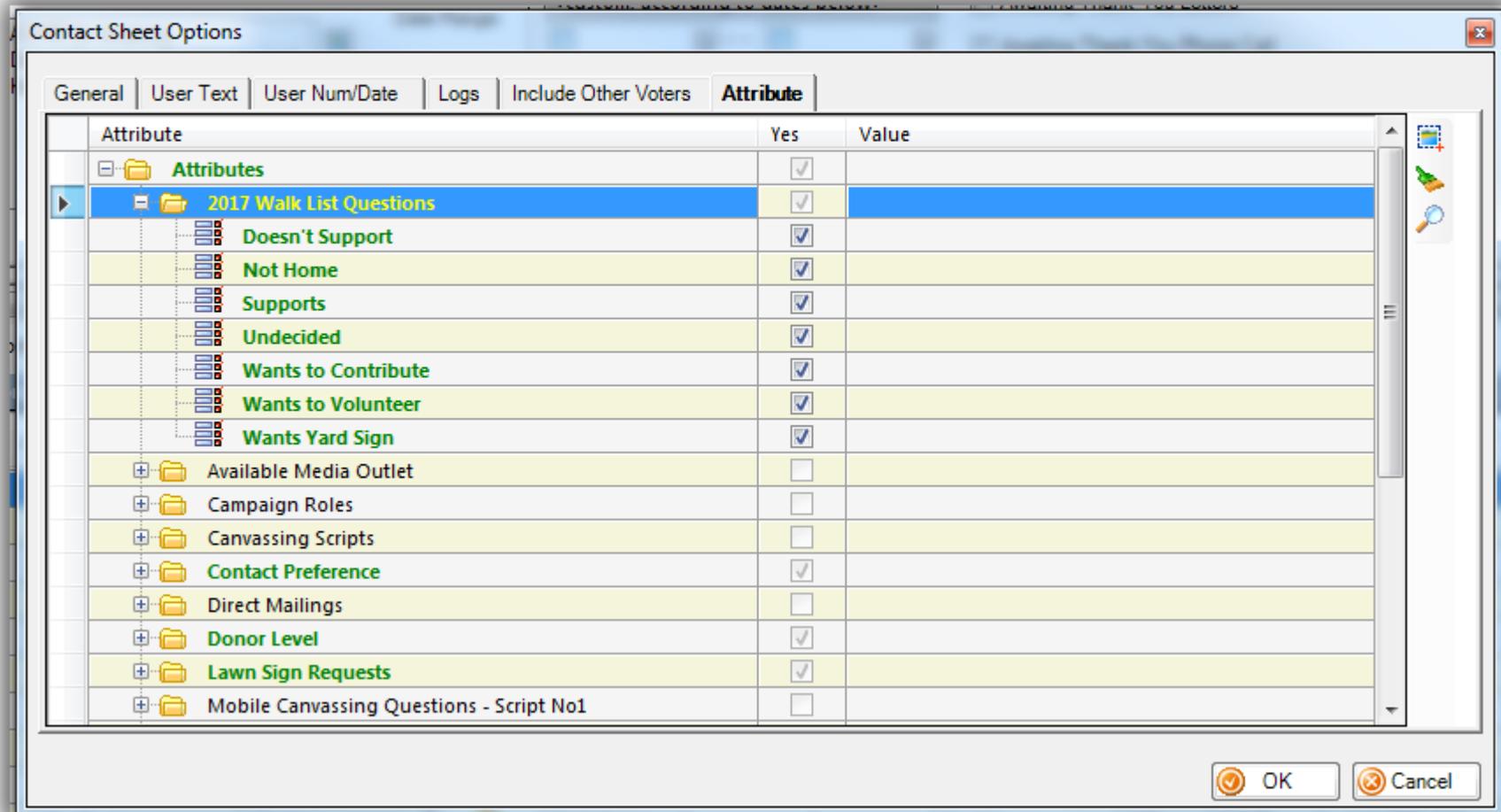


**Under the Include Other Voters tab you can display which relationships you want to display that are linked to the contacts you queried for, you can also display who is in their household (if anyone).**



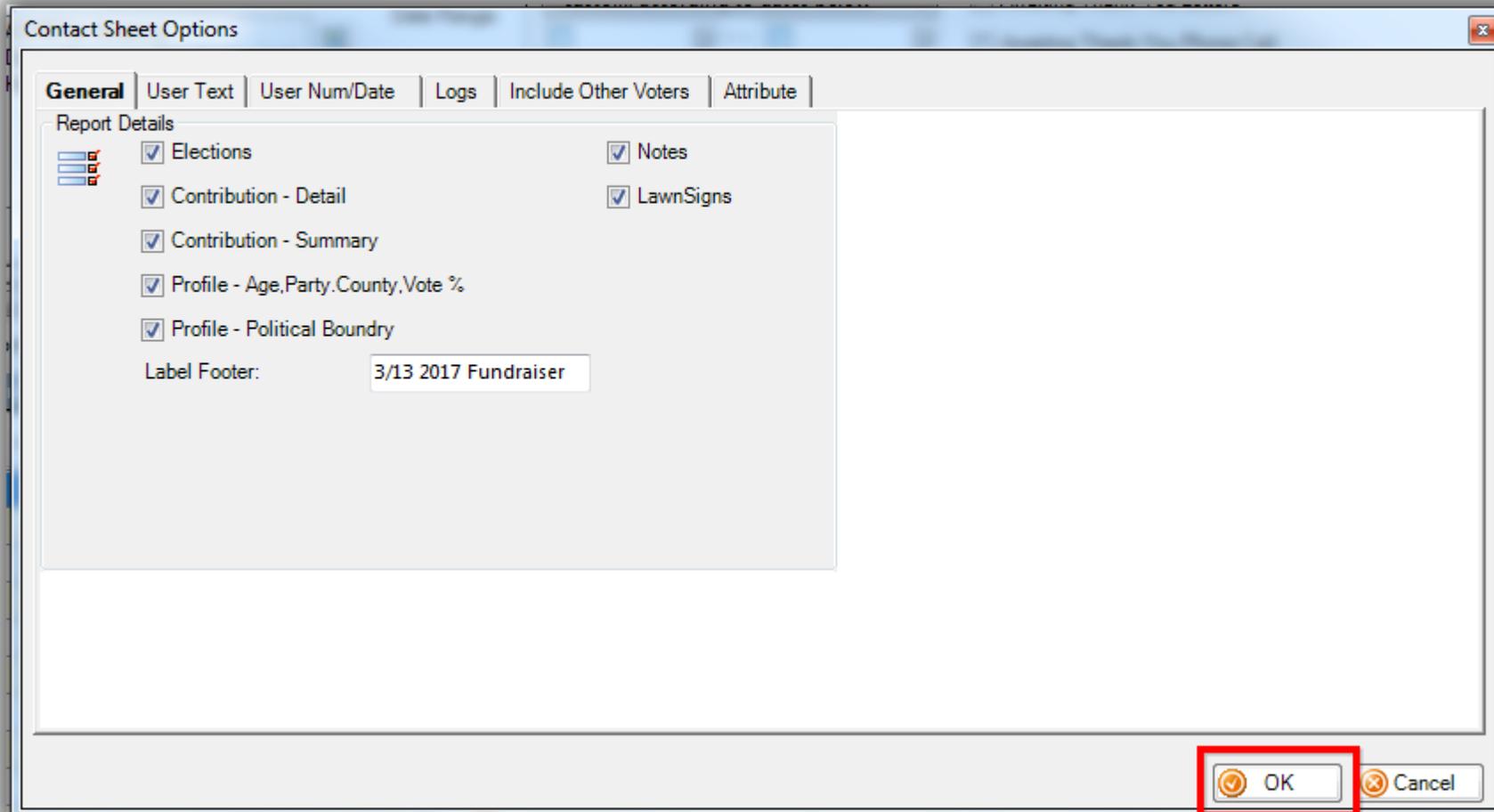
Img 6 of 6 – Attribute

**Under the Attribute tab you can display which attributes you want to print out (whether they have the attribute assigned to them or not).**



Once you're finished configuring everything, click **[OK]** to run the **print preview**. *If you're doing this for a large list it may take a few minutes for the report to finish generating.*

**After everything is configured, click [OK]. If you're running a large list it may take awhile to load.**



The two images below display **print previews** of my *example* call book report. You can click the **[Page Settings]** button to adjust the margins, type of paper, etc. You can view the different pages of the call book using the **blue page forward** and page **backward buttons** on the top tool strip.

Img 1 of 2 – Page 1 Example Call Book Report

## Example print preview of a call book report.

Print to paper or as a PDF.

Page forward and backwards.

All the details you configured on the previous screens for the call book report.

Print Less More 1 Print Settings

Printed On Mon Mar 13 2017  
**Marjory Florence Aaberg**

Nick Name:  
 Address: 504 8th St E  
 City/State/Zip: Starbuck, MN 56381

---

**Contact Information:**

Home Phone : 763-218-4433	Ext:	Cell Phone :	Ext:
Alt Phone :	Ext:	Bus Phone :	Ext:
BusFax Phone:	Ext:		
<input type="checkbox"/> Email:		<input type="checkbox"/> Alt Email:	
@		@	

Email Note: \_\_\_\_\_ Alt Email Note: \_\_\_\_\_  
 Employer: \_\_\_\_\_ Occupation: \_\_\_\_\_

---

**Text User Fields:**

Voter Score:	Ethnicity:
Religion:	Ask Amount:
Twitter Handle:	Membership Type:
Facebook Page:	Skype ID:
Unique ID:	User Field 10:
User Field 11:	User Field 12:

---

**Relationships:**  
 None

---

**Household members:**  
 Aaron Cole Byrd

---

**Profile:**

Age: 56	Party: IND
County: Pope	Vote:33%
LD: 13A	CD: 07
Precinct Code: 0125	Precinct Name: STARBUCK
Reg Date: 11/02/2010	Ward:

---

**Note:**  
 ---- 03/21/2008 ----  
 sent letter 1/1/2008  
 ----

---

**Contributions:**

Current Election	Previous Election		Next Election		Date Range	
Count	Total	Count	Total	Count	Total	
1	\$500.00	0	\$0.00	0	\$0.00	1 \$500.00
02/22/2006 - \$75.00			05/19/2016 - \$500.00 Demo Campaign Database - Joel			

---

**2017 Walk List Questions:**

<input type="checkbox"/> Doesn't Support	<input type="checkbox"/> Not Home	<input type="checkbox"/> Supports
<input type="checkbox"/> Undecided	<input type="checkbox"/> Wants to Contribute	<input type="checkbox"/> Wants to Volunteer
<input type="checkbox"/> Wants Yard Sign		

---

**Contact Preference:**

<input type="checkbox"/> Email	<input type="checkbox"/> In Person	<input type="checkbox"/> Phone
<input type="checkbox"/> USPS		

---

**Donor Level:**

Img 2 of 2 – Page 2 Example Call Book Report

### Example page two of a call book report.

Printed On Mon Mar 13 2017

Likely       Moderate       Unlikely  
 Wealthy

---

**Lawn Sign Requests:**

Large       Medium       Small

---

**Source:**

Shared Database Import       Website Contribution       Website Email Signup  
 Website Event Signup       Website Signup

---

**Source\Junk - Delete Later:**

Already Present, Did Not I...       Just Imported       Load  
 Manually Entered       Possible Duplicate Record, ...

---

**Source\Shared Database - Minnesota Voter:**

Attributes imported       Contributions imported       Voter imported

---

**Voter Candidate Support:**

Does Not Support       Support       Undecided

---

**Voter Issues:**

Defense/Security       Education       Gun Rights  
 Gun Rights - expanding       Health Care bill       Immigration  
 Jobs       Medical       NSA  
 State Budget       Taxes - Currently Too high       Taxes - Currently Too Low  
 Unemployment

---

**Lawn Sign:**

---

**Log:**

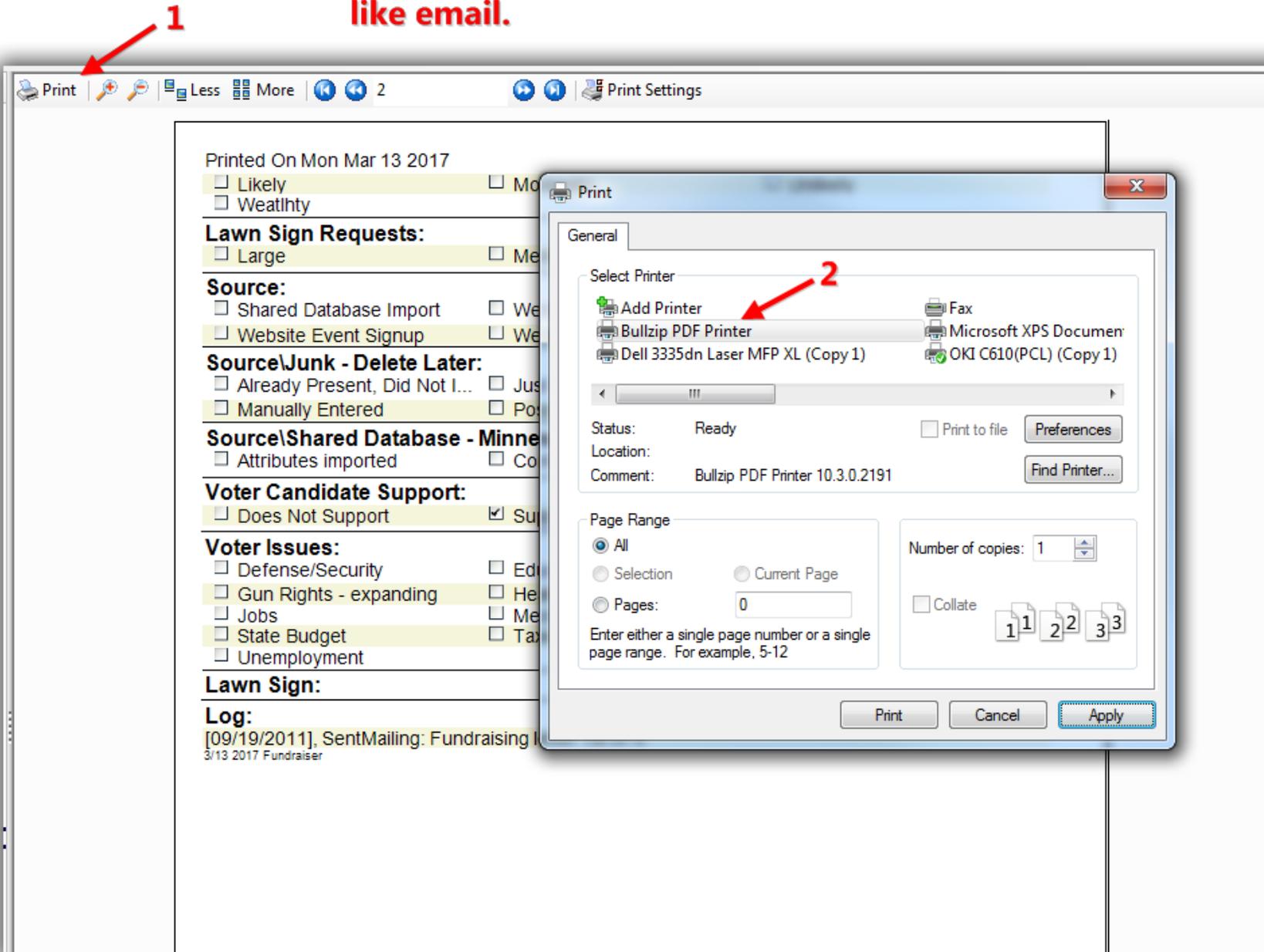
[09/19/2011], SentMailing: Fundraising letter 1st of 5

3/13 2017 Fundraiser

Once you're ready you can click the **[Print]** button to print to either **paper** or as a **PDF** (*requires you have a PDF printer installed*).

**If you want to print the report as a PDF you can select that option (if you have a PDF printer installed). Then you can send it via things like email.**

**1**



Print | Less | More | 2 | Print Settings

Printed On Mon Mar 13 2017

- Likely
- Wealthy

**Lawn Sign Requests:**

- Large

**Source:**

- Shared Database Import
- Website Event Signup

**SourceJunk - Delete Later:**

- Already Present, Did Not I...
- Manually Entered

**Source\Shared Database - Minne**

- Attributes imported

**Voter Candidate Support:**

- Does Not Support
- Support

**Voter Issues:**

- Defense/Security
- Gun Rights - expanding
- Jobs
- State Budget
- Unemployment

**Lawn Sign:**

**Log:**  
[09/19/2011], SentMailing: Fundraising I  
3/13 2017 Fundraiser

**Print** dialog box:

- General
- Select Printer
  - Add Printer
  - Bullzip PDF Printer**
  - Dell 3335dn Laser MFP XL (Copy 1)
  - Fax
  - Microsoft XPS Document
  - OKI C610(PCL) (Copy 1)
- Status: Ready
- Location: Bullzip PDF Printer 10.3.0.2191
- Page Range
  - All
  - Selection
  - Pages: 0
- Number of copies: 1
- Collate
- Buttons: Print, Cancel, Apply

 **Tip:** Instead of printing directly to paper you could save your call book report as a **pdf**. I would suggest using the free [Bullzip PDF](#) if you're working on a PC. *Typically a computer will come with a PDF printer installed.*

Take a look at the **related resources** below for links to a variety of similar articles and videos.



Trail Blazer™

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

## **Related Resources**

**Article:** [Customizing Field Names](#)

**Article:** [Walk List Selectable Format](#)

**Article:** [Adding Log Types](#)

**Article:** [Adding Log Notes, Mass Log Notes & Reminders](#)

**Article:** [How to Rename User Fields, Query by them, Add them to the Grid as Columns, and Utilizing them as Merge Fields in a Letter & E-Mail Template](#)

**Article:** [How to Create Attribute Folders and Attribute Items \(Custom Categories\)](#)

**Article:** [Creating and Saving Default Formats for Reporting with the Grid](#)

**Article:** [Add Attributes, Attribute Dates, and Attribute Notes to the Grid by Formatting them in as Columns](#)

**Article:** [Mobile Base Camp – Contact Search](#)

**Article:** [Mobile Base Camp – How to Create and Run a Mobile Canvassing \(Walk\) List](#)

**Article:** [Mobile Base Camp – How to Setup and Use the Mobile Poll Watching App](#)

**Article:** [Tips and Tricks for using Mobile Base Camp – Add Shortcuts to your Home Screen, Adjust Device Settings to Keep the Screen on, and More](#)

**Article:** [Log Notes vs User Fields vs Attributes](#)

**Article:** [SQL Wildcards](#)

**Article:** [Save and Load a Search Query as a \(Dynamic\) Search Favorite](#)

**Video:** [Reporting 102 – Quick Reports and Export](#)

**Video:** [Attributes – Adding New](#)

**Video:** [Reporting 101 – Political – Contribution reports & Walk Lists](#)

**Video:** [Reporting 104 – Joined tables](#)

**Video:** [Search Tool Strip Enhancements](#)

**Video:** [Getting Started 105 – Queries with an AND condition](#)

**Video:** [Canvass Your Neighborhood With Our Mobile Canvassing App](#)

**Video:** [Getting Started 104 Queries with wildcards](#)

**Video:** [Getting Started 102 Beginning Queries - Political](#)

**Video:** [Getting Started 102 Beginning Queries - Nonprofit](#)

**Video:** [Mobile Canvassing](#)

**3<sup>rd</sup> Party Tool:** [Bullzip PDF Printer](#)

## Trail Blazer Live Support

☎ **Phone:** 1-866-909-8700

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

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

t **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.