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Overview

This article shows how to add **Attribute Values**, **Attribute Dates**, and **Attribute Notes** into the grid as columns for reporting purposes.

This can be very useful for a wide variety of reasons. One example would be to pull the canvassing results from one of your <u>mobile walks lists</u> into a report to see total counts for each answer, as well as the date the voter was canvassed. It can also be useful when re-entering data form a physical paper walk list (*covered in the last section of this article*).

Tips: Get up to speed on how to <u>create new Attribute Folders/Items</u>, and how to <u>save custom Formats</u> for future use.

<u>Steps</u>



Navigate to your contacts list (Voters/Donors) and run your search query. *In my example I pulled up anyone who had any of the attributes I used as questions in my mobile canvassing list, it returned* **2061** *records.*



Construct your query and click [Search].

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Navigate to the **Attributes** tab, locate and expand the folder(s) of Attributes you want to add to the grid, check all of the boxes under the **Setting/Date/Note** columns, and the click **[OK]**.



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The system will add the columns to the far right of the grid (*outlined in red in the screenshot below*).



(Optionally you can click-and-drag on the column header left or right to rearrange the order in which they appear.)



Add Attributes, Attribute Dates, and Attribute Notes to the Grid by Formatting them in as Columns

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At this point you're finished with this process. Continue reading for tips on other useful task you can perform from this point forward, and checkout the related resources at the bottom for links to other articles and videos.

Export

Option 1 - The quickest way to run an export to a .csv file would be to click the **[Export]** button on the list tool strip. (*Image below*).



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Option 2 – To export a <u>householded</u> list and/or to add additional data to the export follow **File** > **Utilities** > **Export** from the file drop-down menu at the top. (*Image below*).



Add Attributes, Attribute Dates, and Attribute Notes to the Grid by Formatting them in as Columns

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<u>Print</u>

To simply print your list on paper, click the **[Print]** button from the list tool strip. (*Two images below*).

Image 1 – Print



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Image 2 – Print Preview (in landscape mode)



You may have to adjust the margins and orientation of the grid in order to get it to fit on paper correctly.

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Generate a Walk List

To create a quick walk list using the current list click the **[Reports]** button in the bottom-right and select **Walk List Selectable Format**.



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Here's the print preview on how the walk list looks with the attribute columns included.



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Print preview of the walk list with attributes included.

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Save Format and Set as Default

If you plan on using the format you created again in the future, click on the **Format** drop-down menu and select **Save-As**. (*Image below*).



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If you want to set it as the default for either you, another user, or all users - click the **Format** drop-down, and select **Assign as Default**. (*Image below*).



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Make Columns Updateable in the Grid View for Batch Data Entry

If you are performing a task such as distributing and re-entering data for paper walks, it can be much quicker if you perform the task in the grid view vs. going into each voter record and manually updating the attributes. To make a column **updateable** click the **Format** drop-down, and select columns.

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Then navigate to the **Format** tab and check the boxes in the **Updateable** columns, and click **[OK]**. KNOWLEDGE BASE www.trailblz.com/kb



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That allows you to then click the **[Edit]** button once you're back in the grid view, turning the columns green, allowing you to go row by row updating the information.



Add Attributes, Attribute Dates, and Attribute Notes to the Grid by Formatting them in as Columns

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Add Attributes, Attribute Dates, and Attribute Notes to the Grid by Formatting them in as Columns



- YouTube Channel

- Knowledge Base Articles

- 3rd Party Resources



Article: Walk List Selectable Format



Article: <u>Create Attribute Folders, and Attribute Items</u> Article: <u>Mobile Base Camp</u> Video: <u>Add attribute dates and notes to your list</u> Video: <u>Walk List Using Format Display</u> Video: Mobile Canvassing App – Pinpoint Canvassing

Trail Blazer Live Support

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- Email: support@trailblz.com
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- 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 <u>is</u> included in your contract.