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**Last Updated:** 2015-04-27

Overview

Roughly a month ago a new update of the software went out which included some significant changes to the way you create **formats**, save them, and most importantly you can now assign them as a **default** for either yourself or all database users. This saves you the hassle of reloading a format each time you open a new search window.

NOTE: Formats are still specific to the list they're created in i.e. Voters/Donors, Contributions, Email Campaigns, Event Attendees, Etc.
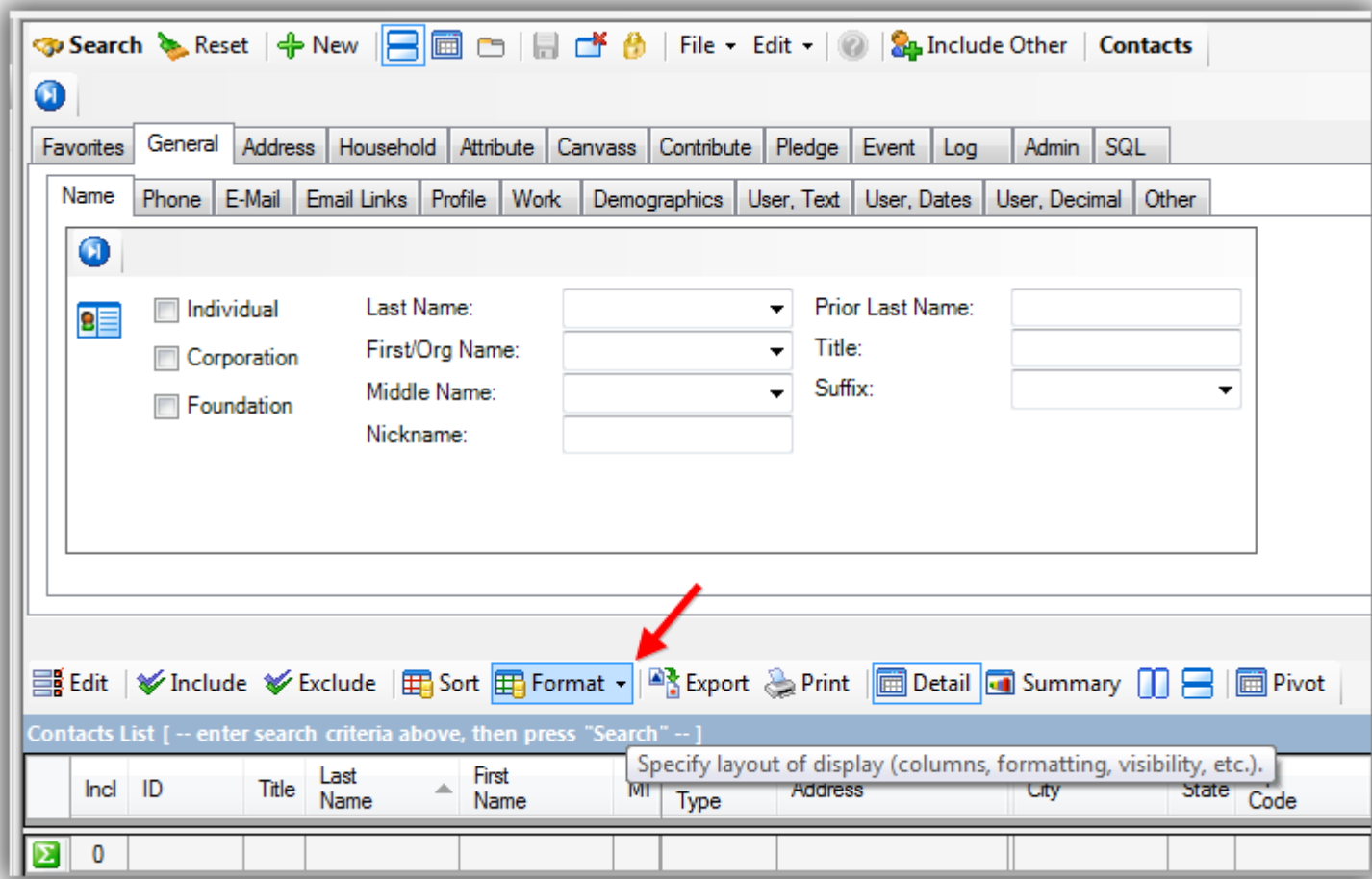
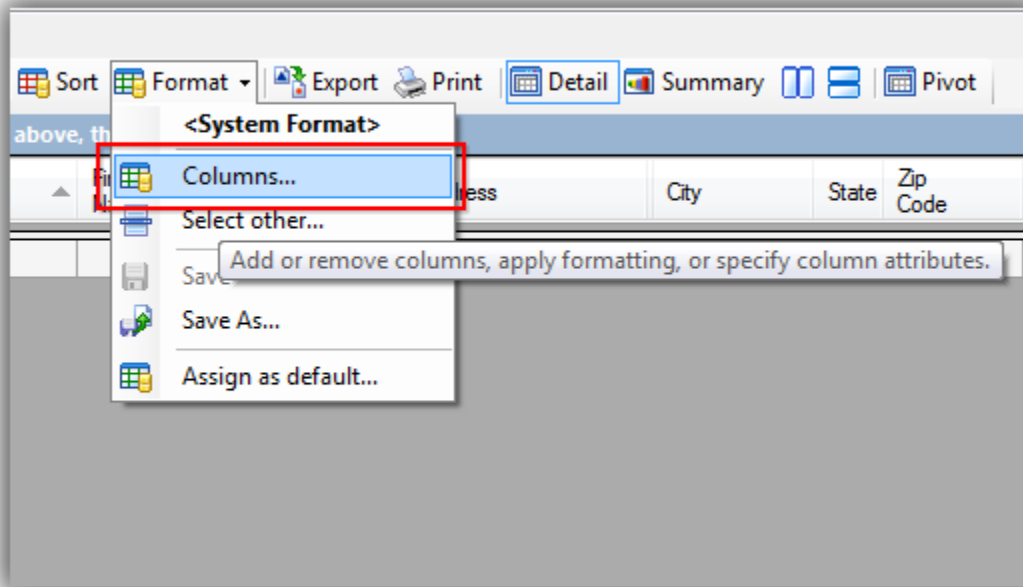💡 **Tips:** Read a blog post on the same topic for a more succinct walkthrough.

Steps

Navigate to the list you want to create a format in, in this example I used my Contacts (*Voter/Donor*) list.
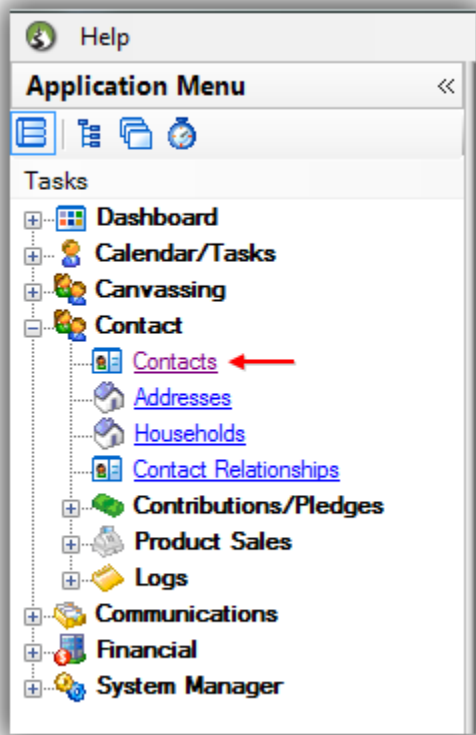
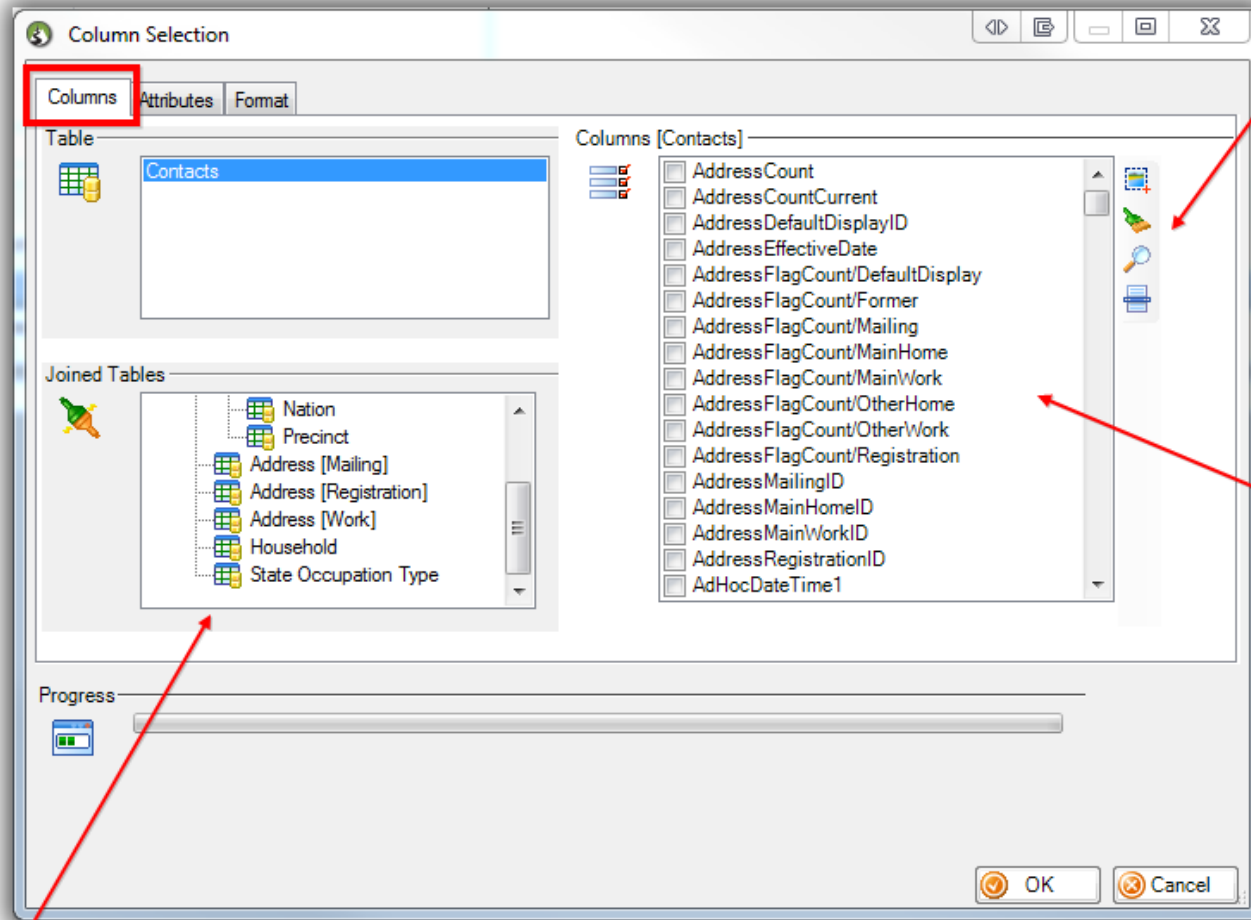Click on the **Format** drop-down menu on the list tool strip.

Select **Columns**.

The options you have in the **Column Selection** window are listed below in **three** separate images with descriptions for each tab.

Columns

- Select which columns display in your grid by checking/unchecking the boxes in the column on the right.
- Select **Joined Tables** in the lower-left to pull in information from other tables in the database i.e. Households, Addresses, User, etc.
- Use the buttons on the right to perform tasks such as Select All, Clear All, and Show Selected.

Attributes

- - You can add the Attribute Values, Dates, and Note fields into the grid as columns from this tab.
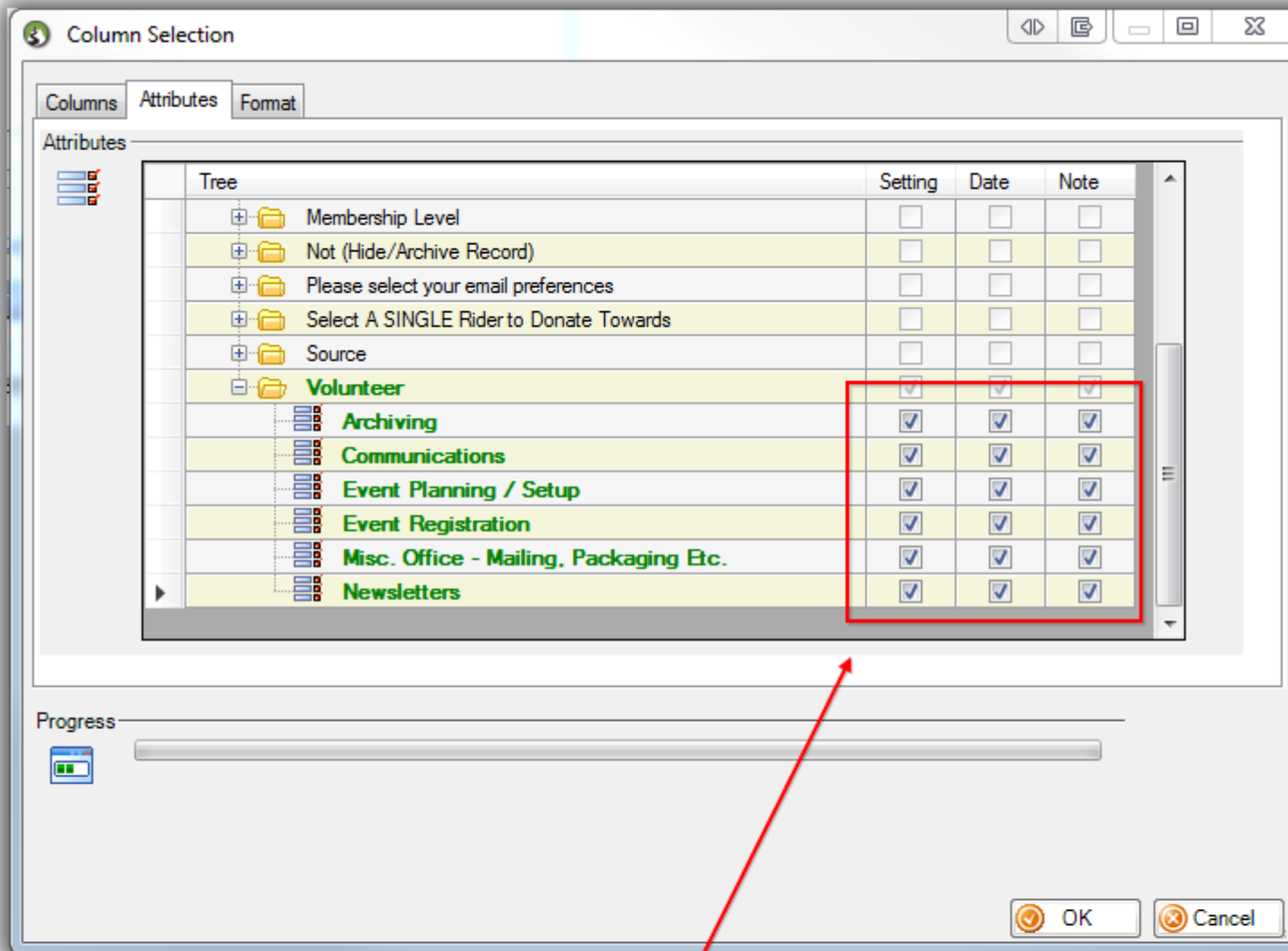
Check the boxes in the Setting, Date,
and Note fields as columns into
the grid. (Very useful for political
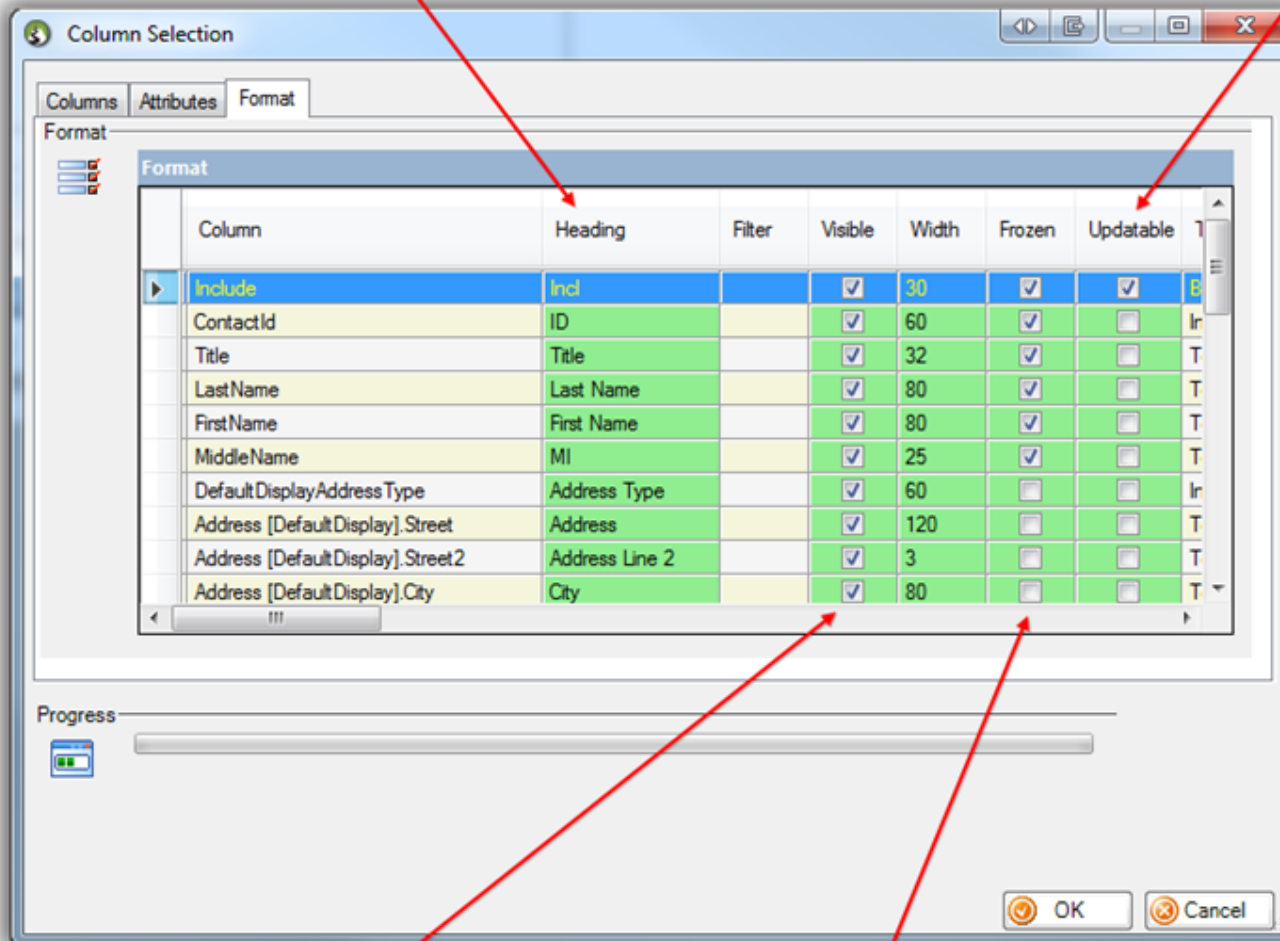campaigns who are tracking walk
list questions as attributes.)

Format

- Change the column title under the **Header** column.
- Quickly remove certain columns by unchecking them under the **Visible** column.
- Choose which columns are frozen under the **Frozen** tab.
- Choose which columns are **updateable** under the **Updateable** column.

Change the column header by double-clicking in the green column and overwriting the values.

Choose which columns are updateable in the grid view by checking the corresponding boxes in the 'Updateable' column.

Column Selection

Columns | Attributes | **Format**

Format

Format

Column	Heading	Filter	Visible	Width	Frozen	Updatable	T
Include	Incl		✓	30	✓	✓	B
ContactId	ID		✓	60	✓	☐	Ir
Title	Title		✓	32	✓	☐	T
LastName	Last Name		✓	80	✓	☐	T
FirstName	First Name		✓	80	✓	☐	T
MiddleName	MI		✓	25	✓	☐	T
DefaultDisplayAddressType	Address Type		✓	60	☐	☐	Ir
Address [DefaultDisplay].Street	Address		✓	120	☐	☐	T
Address [DefaultDisplay].Street2	Address Line 2		✓	3	☐	☐	T
Address [DefaultDisplay].City	City		✓	80	☐	☐	T

Progress

OK | Cancel

Quickly remove certain columns by unchecking them under the Visible column.

Choose which columns remain frozen in the grid view.

These are the options that you have within the **Column Selection** window, once you've configured the format you can click **[OK]** to update the grid.
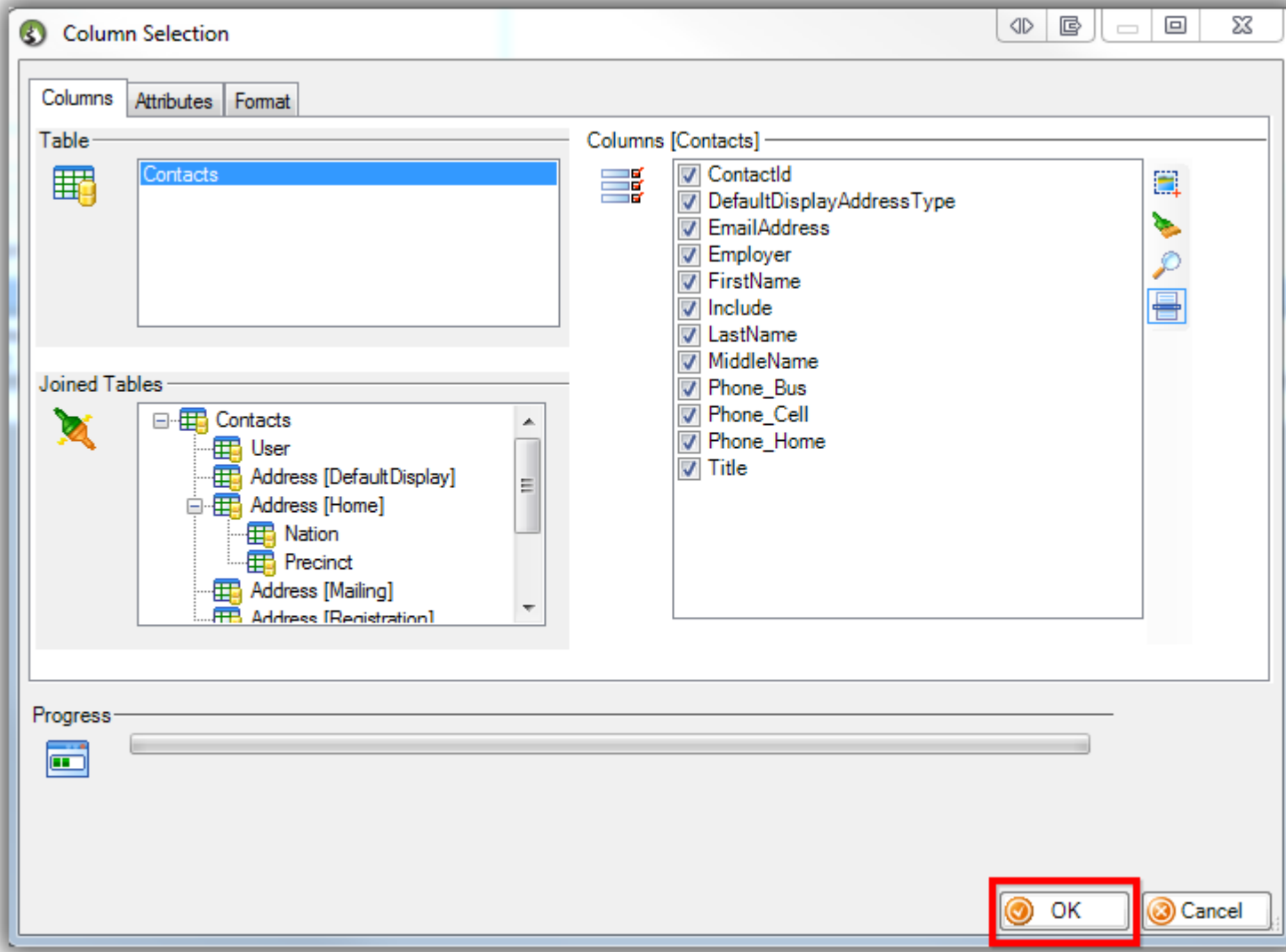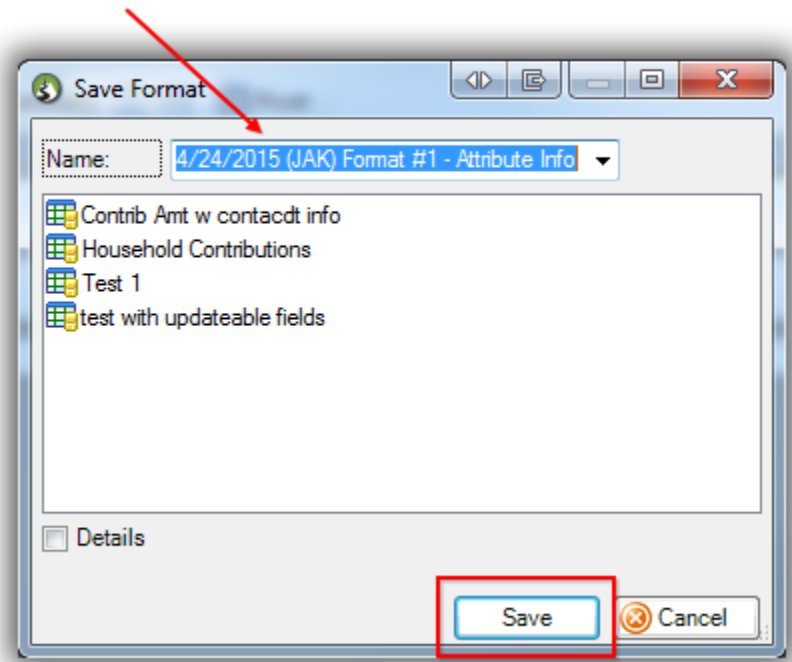
Once you have a format that you're satisfied with you'll need to **save** it before you can assign it as a system default.

Click the **Format** drop-down button, and select **Save as…**.
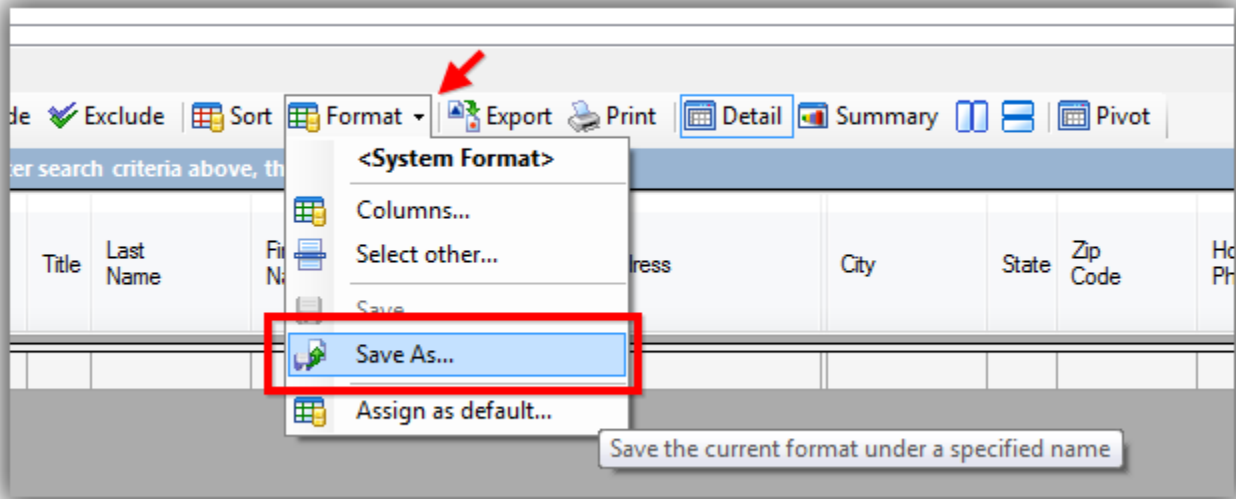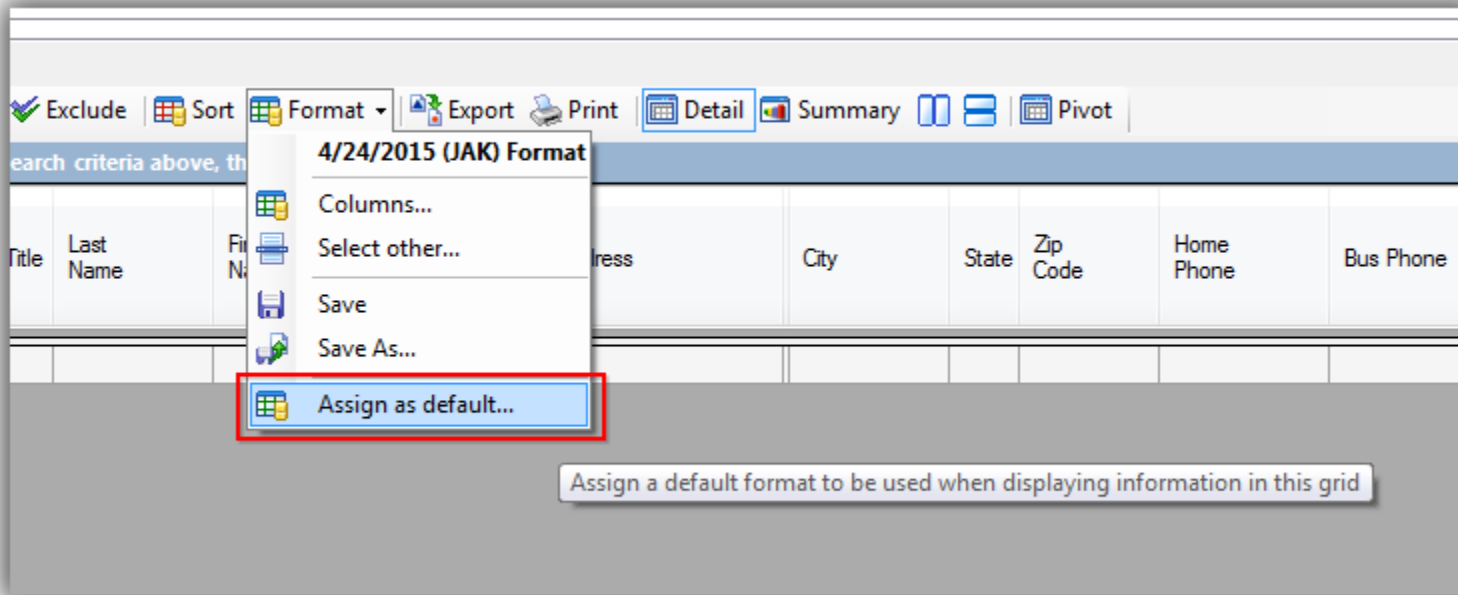

Give the format a recognizable name, and click **[Save]**.

Create a recognizable name.

After you've saved your format, you can then set is as a **default** for either you specifically OR for all other users of the database.

Click the **Format** drop-down button, and select **Assign as Default**…

This will bring up another screen which gives you two options:
- This format is used as my personal default.
- This format is used as the global default, affecting all users.

Options when assigning your format.

Assign Format Default

Format: 4/24/2015 (JAK) Format #1 - Attribute Info

☐ This format is used as my personal default.

☐ This format is used as the global default, affecting all users.

[OK]   [Cancel]
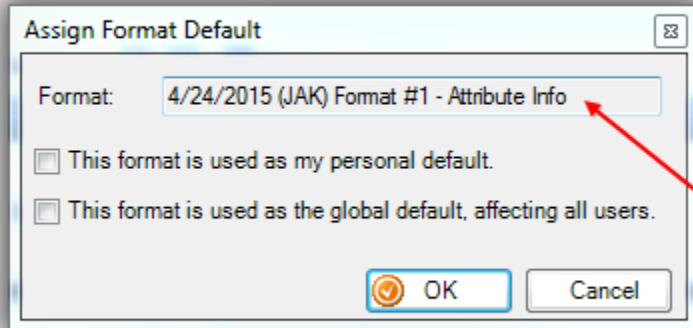
Name of current format that's in the grid.

*(In my example I chose to set it is as a **personal** format.)*

Click **[OK]** to finish.

Assign Format Default

Format: 4/24/2015 (JAK) Format #1 - Attribute Info

☑ This format is used as my personal default.

☐ This format is used as the global default, affecting all users.

[OK]   [Cancel]
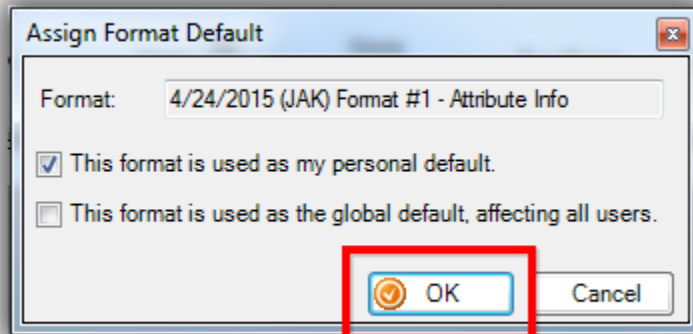
You're now finished with this process. Take a look at related resources below for links to other articles, and videos, and feel free to call/email our support line if any questions come up going through these steps.

Trail Blazer

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

Related Resources

Article: Blog Post on New Formatting Changes

Article: Creating Formats

Article: Household Export

Video: Filtered Contribution Columns in the Format

Video: Reporting 102 – Quick Reports and Export

Trail Blazer Live Support

- **Phone:** 1-866-909-8700
- **Email:** support@trailblz.com
- **Facebook:** https://www.facebook.com/pages/Trail-Blazer-Software/64872951180
- **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.