

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item


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Overview

This article walks through the steps to **filter** a user's access to your database. It's an extra layer of security that you can implement on top of generic user security levels. The intent of this tool is to limit the **amount of records** a user can view by things like a saved **search favorite, address data**, and by a specific **attribute item**.

IMPORTANT! This process **requires** you have full [administrative access](#) to your database.

 **Tip:** Use the **Ctrl+F** hot key to jump to different sections of this article (example: “**#1**”, “**#2**” or “**Related Resources**”).

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

Outline

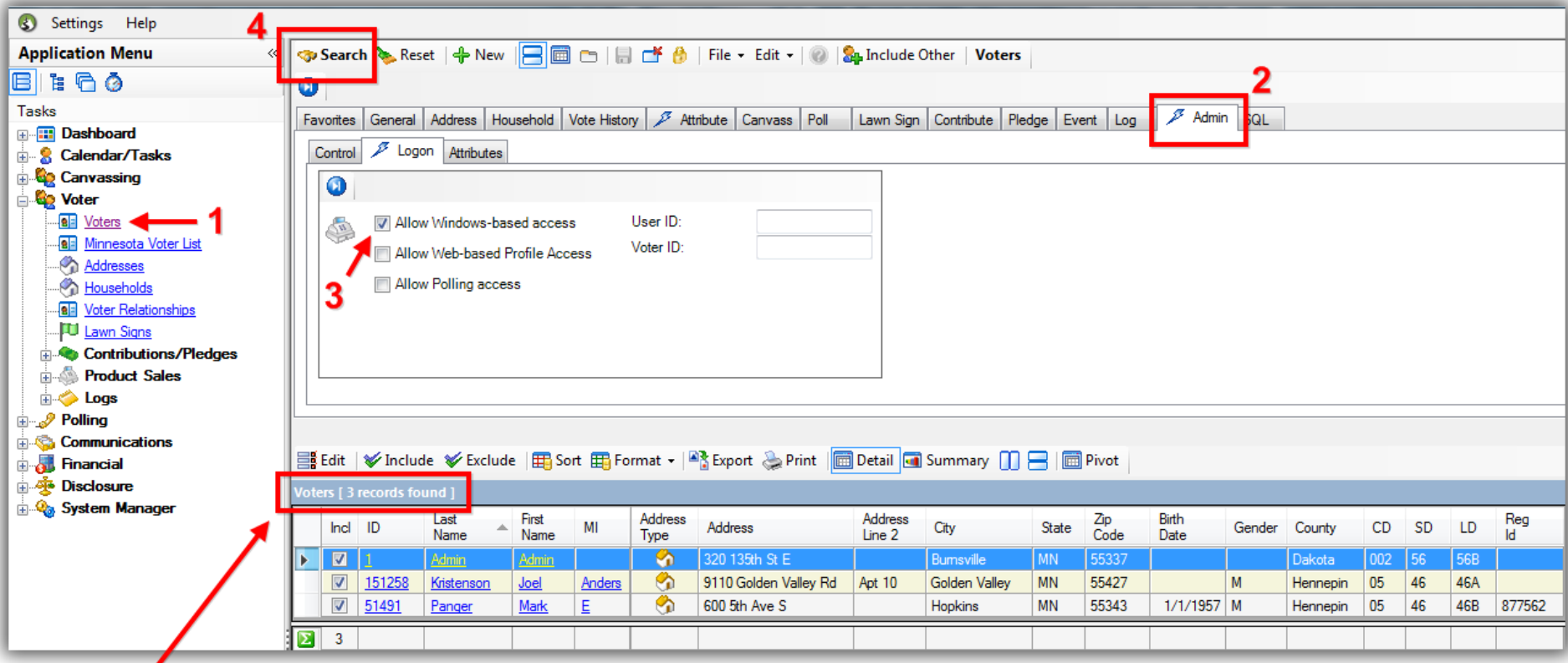
- #1 Different Ways to Query for Current Database Users
- #2 Filter Database Access by a Saved Favorite
- #3 Filter Database Access by Address (State, City, County, District...)
- #4 Filter Database Access by a Specific Attribute Item – (*Nonprofit Example*)
- #5 Related Resources

#1 Different Ways to Query for Current Database Users

To begin, it's important to know how to query for existing database users. *If you haven't yet learned how to create new users you'll need to read [this article](#).*

To pull up a list of all users who *currently* have access to your database navigate to your **Contacts (Voters/Donors)** list, click on the **Admin > Logon** tab, check **Allow Windows Based Access**, and click **[Search]**. *In my example it produced 3 contact records for users who have Windows Based access to my database.*

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item



The screenshot shows the TrailBlazer application interface. On the left is a navigation tree with 'Voters' selected. The main window displays the 'Voters' table with 3 records found. A search dialog is open, showing filters for 'Allow Windows-based access', 'Allow Web-based Profile Access', and 'Allow Polling access'. The 'Admin' user is highlighted in the table. Red annotations 1-4 point to the 'Voters' link, the search dialog, the 'Admin' user, and the search icon in the application menu respectively.

Incl	ID	Last Name	First Name	MI	Address Type	Address	Address Line 2	City	State	Zip Code	Birth Date	Gender	County	CD	SD	LD	Reg Id
<input checked="" type="checkbox"/>	1	Admin	Admin			320 135th St E		Burnsville	MN	55337			Dakota	002	56	56B	
<input checked="" type="checkbox"/>	151258	Kristenson	Joel	Anders		9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427		M	Hennepin	05	46	46A	
<input checked="" type="checkbox"/>	51491	Panger	Mark	E		600 5th Ave S		Hopkins	MN	55343	1/1/1957	M	Hennepin	05	46	46B	877562

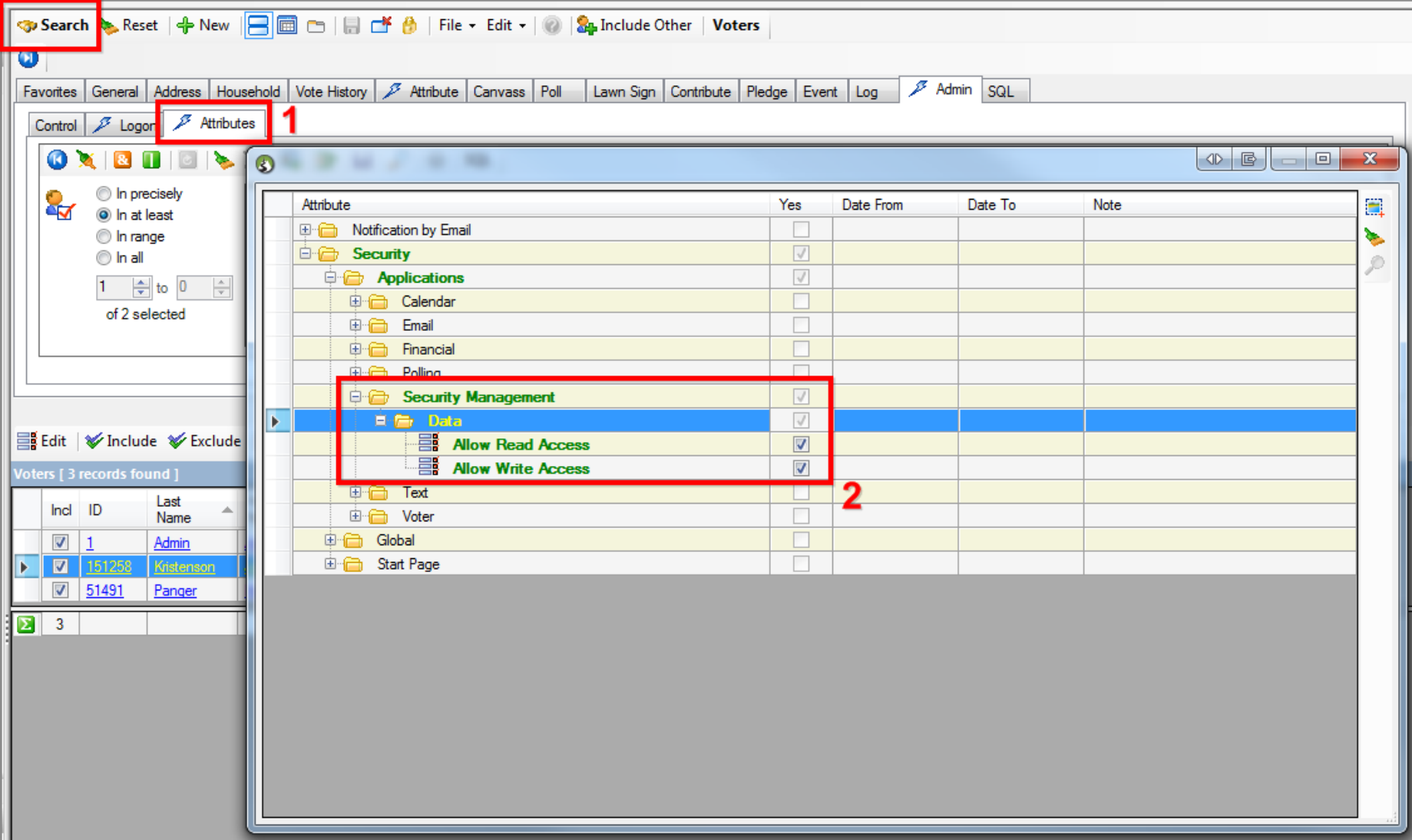
Total count of all users who have access to the database.

You can filter further by searching under the **Attributes** sub-tab for users who have a specific security level. The example below is a common one where you can quickly see who the database administrators are by using the **Security Management** attribute.

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

Searching by Security Management will provide a list of database administrators with full security access.

3



1

2

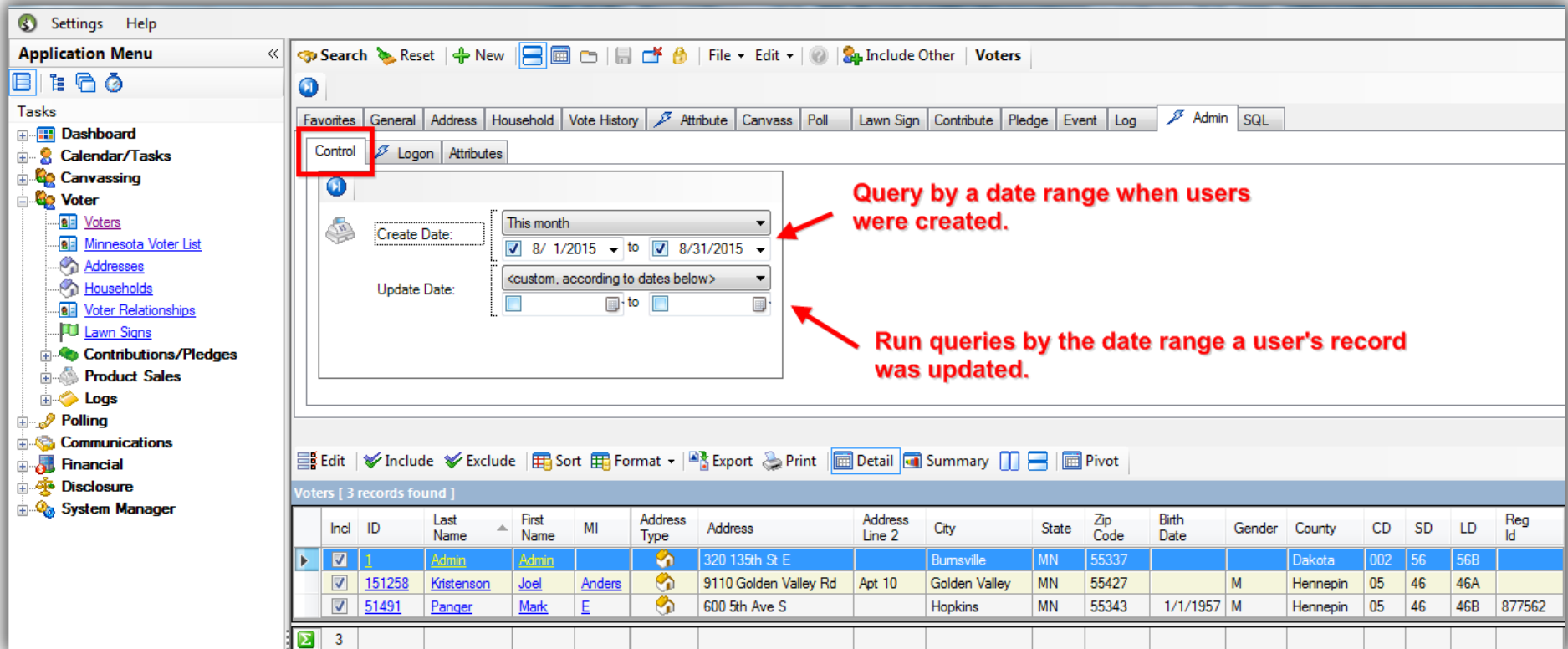
The screenshot shows the TrailBlazer software interface. The top navigation bar includes 'Search', 'Reset', 'New', and 'Voters'. Below this is a menu with 'Attributes' selected. On the left, there are search filters: 'In precisely', 'In at least', 'In range', and 'In all', with '1 to 0 of 2 selected'. Below the filters is a table of voters with 3 records found. The main window displays a tree view of database attributes. The 'Security Management' folder is expanded, showing 'Data' with 'Allow Read Access' and 'Allow Write Access' sub-items. A table below the tree shows the 'Yes' status for each attribute.

Attribute	Yes	Date From	Date To	Note
Notification by Email	<input type="checkbox"/>			
Security	<input checked="" type="checkbox"/>			
Applications	<input checked="" type="checkbox"/>			
Calendar	<input type="checkbox"/>			
Email	<input type="checkbox"/>			
Financial	<input type="checkbox"/>			
Polling	<input type="checkbox"/>			
Security Management	<input checked="" type="checkbox"/>			
Data	<input checked="" type="checkbox"/>			
Allow Read Access	<input checked="" type="checkbox"/>			
Allow Write Access	<input checked="" type="checkbox"/>			
Text	<input type="checkbox"/>			
Voter	<input type="checkbox"/>			
Global	<input type="checkbox"/>			
Start Page	<input type="checkbox"/>			

3

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

Under the **Control** tab you can query by the date a user was **created/updated** as well as by their **Voter (*donor*) ID**, and **User ID**.



Control Logon Attributes

Create Date: This month (8/ 1/2015 to 8/31/2015)

Update Date: <custom, according to dates below>

Query by a date range when users were created.


Run queries by the date range a user's record was updated.

Voters [3 records found]

Incl	ID	Last Name	First Name	MI	Address Type	Address	Address Line 2	City	State	Zip Code	Birth Date	Gender	County	CD	SD	LD	Reg Id
<input checked="" type="checkbox"/>	1	Admin	Admin			320 139th St E		Burnsville	MN	55337			Dakota	002	56	56B	
<input checked="" type="checkbox"/>	151258	Kristenson	Joel	Anders		9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427		M	Hennepin	05	46	46A	
<input checked="" type="checkbox"/>	51491	Panger	Mark	E		600 5th Ave S		Hopkins	MN	55343	1/1/1957	M	Hennepin	05	46	46B	877562

Now that you know how to find your database users, the next steps show how to apply specific filters to their login sessions. This can be very beneficial for large non-profit associations with different chapters in different states, as well as for large political campaigns that have hundreds of volunteers that don't need full access to the entire database of voters/donors.

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

 **Tip:** If you're concerned about a user's security access, one trick is to log in with that user's credentials to make sure that they don't have access to more than they should.

#2 Filter Database Access by a Saved Search Query

Search for and open the user's contact record you wish to apply a filter for. *In this example I used my own user record (Joel Kristenson).*

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

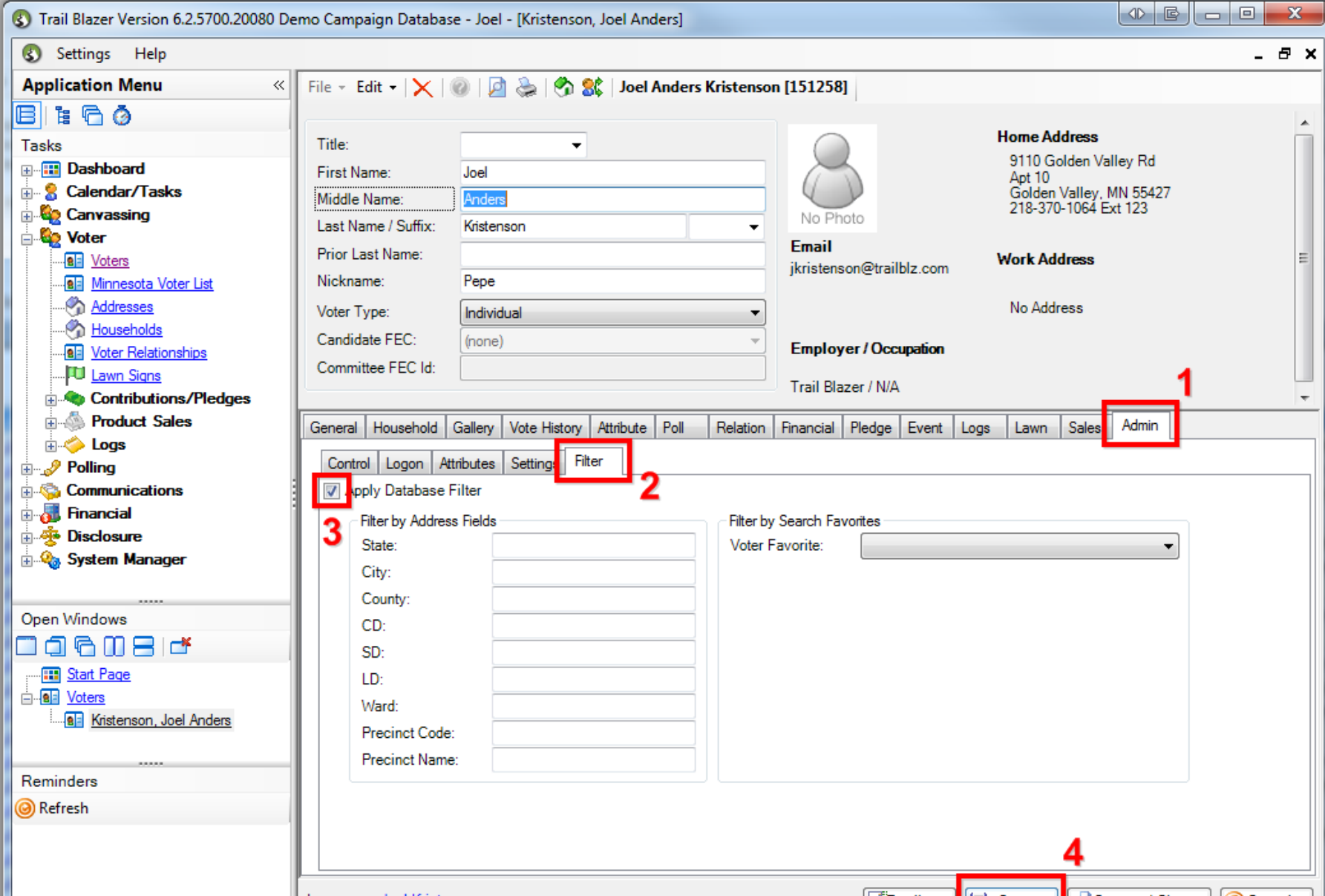
Incl	ID	Last Name	First Name	MI	Address Type	Address	Address Line 2	City	State	Zip Code	Birth Date	Gender	County	CD	SD	LD	Reg Id
<input checked="" type="checkbox"/>	1	Admin	Admin			320 135th St E		Burnsville	MN	55337			Dakota	002	56	56B	
<input checked="" type="checkbox"/>	151258	Kristenson	Joel	Anders		9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427		M	Hennepin	05	46	46A	
<input checked="" type="checkbox"/>	51491	Panzer	Mark	E		600 5th Ave S		Hopkins	MN	55343	1/1/1957	M	Hennepin	05	46	46B	877562
<input checked="" type="checkbox"/>	3																

Click on the name of the user to open their record card.

Navigate to the **Admin > Filter** tab, check the box for **Apply Database Filter**, and click **[Save]**.

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

Applying the database filter in a user's contact record.



The screenshot displays the TrailBlazer software interface for a user's contact record. The window title is "Trail Blazer Version 6.2.5700.20080 Demo Campaign Database - Joel - [Kristenson, Joel Anders]". The main content area shows the contact details for Joel Anders Kristenson [151258].

Contact Information:

- Title: [Dropdown]
- First Name: Joel
- Middle Name: Anders
- Last Name / Suffix: Kristenson
- Prior Last Name: [Empty]
- Nickname: Pepe
- Voter Type: Individual
- Candidate FEC: (none)
- Committee FEC Id: [Empty]

Home Address: 9110 Golden Valley Rd, Apt 10, Golden Valley, MN 55427, 218-370-1064 Ext 123

Work Address: No Address

Email: jkristenson@trailblz.com

Employer / Occupation: Trail Blazer / N/A

Navigation and Filter Options:

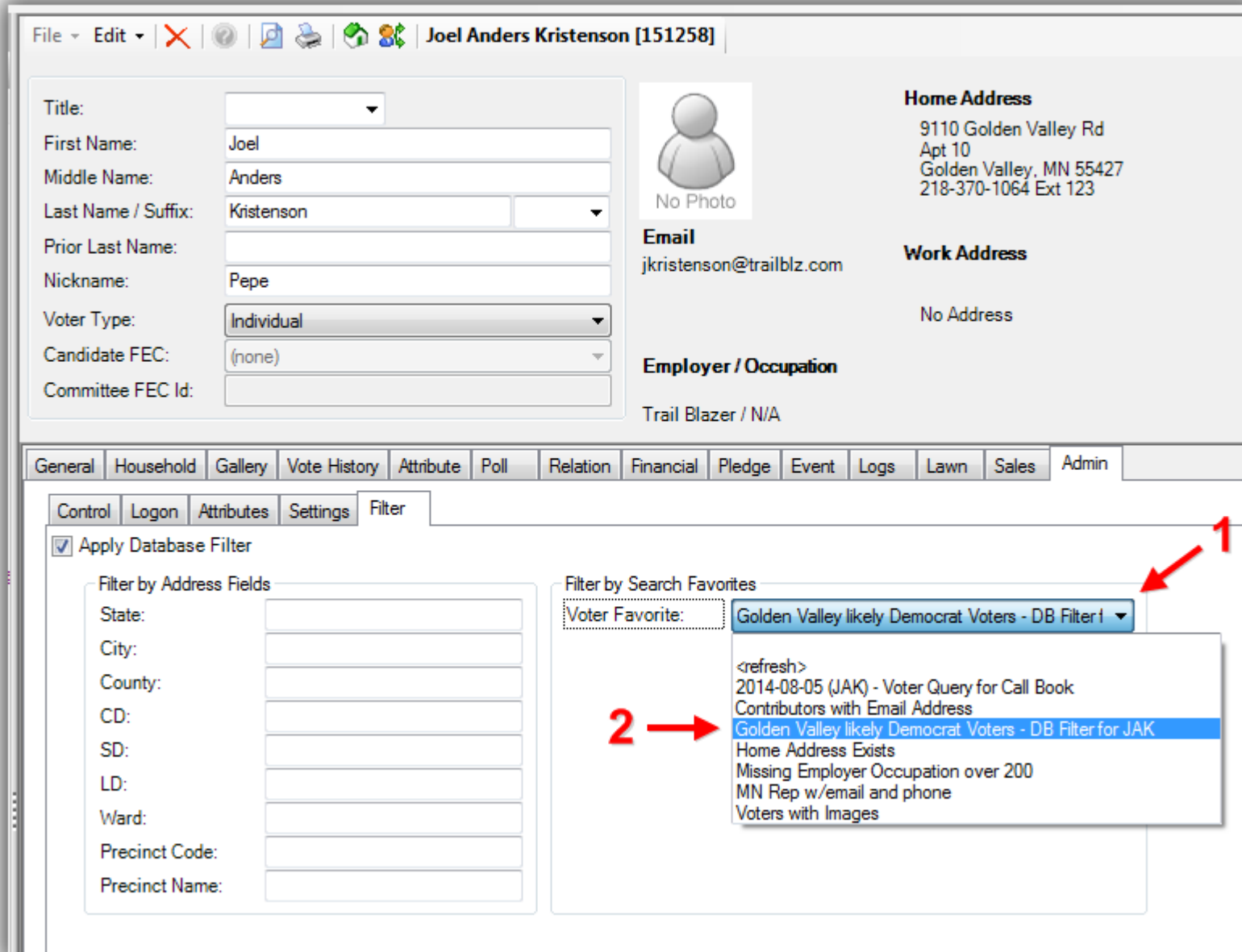
- At the bottom of the contact record, there are tabs: General, Household, Gallery, Vote History, Attribute, Poll, Relation, Financial, Pledge, Event, Logs, Lawn, Sales, and **Admin** (highlighted with a red box and number 1).
- Below the tabs, there are sub-tabs: Control, Logon, Attributes, Settings, and **Filter** (highlighted with a red box and number 2).
- The **Filter** sub-tab contains a checkbox labeled "Apply Database Filter" (checked, highlighted with a red box and number 3).
- Under "Filter by Address Fields", there are input fields for State, City, County, CD, SD, LD, Ward, Precinct Code, and Precinct Name.
- Under "Filter by Search Favorites", there is a dropdown menu for "Voter Favorite:".
- At the bottom of the window, there are buttons for "Save" (highlighted with a red box and number 4), "Save and Close", and "Cancel".

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

Select the saved search query favorite from the drop-down list to filter the user's access by. *In my example I previously saved a favorite called "Golden Valley likely Democratic Voters – DB Filter for JAK".*

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

Filtering by a saved search favorite.



File Edit X ? [Icons] Joel Anders Kristenson [151258]

Title: [Dropdown]
First Name: Joel
Middle Name: Anders
Last Name / Suffix: Kristenson [Dropdown]
Prior Last Name: [Text]
Nickname: Pepe
Voter Type: Individual [Dropdown]
Candidate FEC: (none) [Dropdown]
Committee FEC Id: [Text]

Home Address
9110 Golden Valley Rd
Apt 10
Golden Valley, MN 55427
218-370-1064 Ext 123

Work Address
No Address

Email
jkristenson@trailblz.com

Employer / Occupation
Trail Blazer / N/A

General Household Gallery Vote History Attribute Poll Relation Financial Pledge Event Logs Lawn Sales Admin

Control Logon Attributes Settings Filter

Apply Database Filter

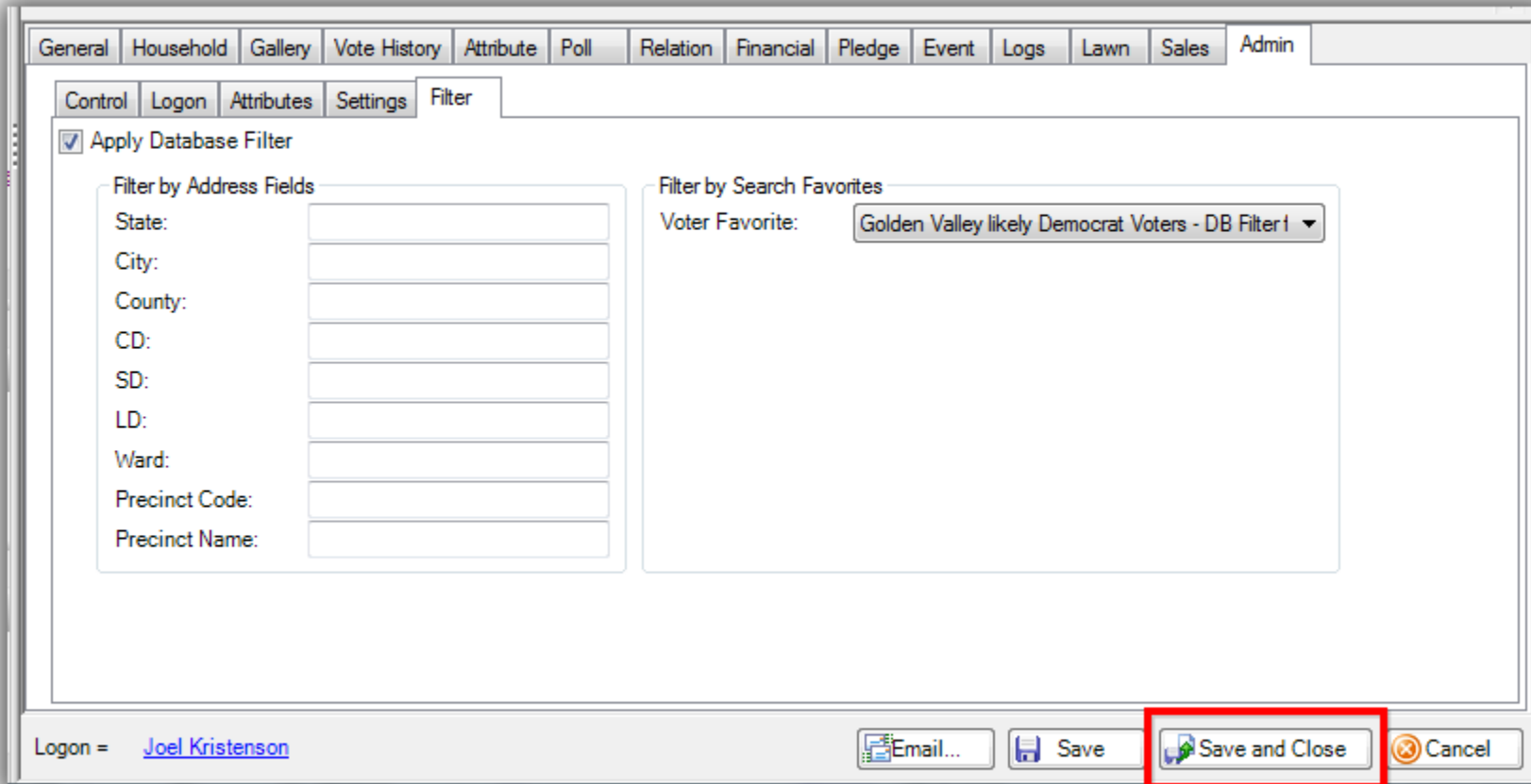
Filter by Address Fields
State: [Text]
City: [Text]
County: [Text]
CD: [Text]
SD: [Text]
LD: [Text]
Ward: [Text]
Precinct Code: [Text]
Precinct Name: [Text]

Filter by Search Favorites
Voter Favorite: Golden Valley likely Democrat Voters - DB Filter for JAK [Dropdown]

- <refresh>
- 2014-08-05 (JAK) - Voter Query for Call Book Contributors with Email Address
- Golden Valley likely Democrat Voters - DB Filter for JAK
- Home Address Exists
- Missing Employer Occupation over 200
- MN Rep w/email and phone
- Voters with Images

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

Once that step is complete you can click **[Save and Close]**.



General Household Gallery Vote History Attribute Poll Relation Financial Pledge Event Logs Lawn Sales Admin

Control Logon Attributes Settings Filter

Apply Database Filter

Filter by Address Fields

State:

City:

County:

CD:

SD:

LD:

Ward:

Precinct Code:

Precinct Name:

Filter by Search Favorites

Voter Favorite: Golden Valley likely Democrat Voters - DB Filter 1 ▼

Logon = [Joel Kristenson](#)

Email... Save **Save and Close** Cancel

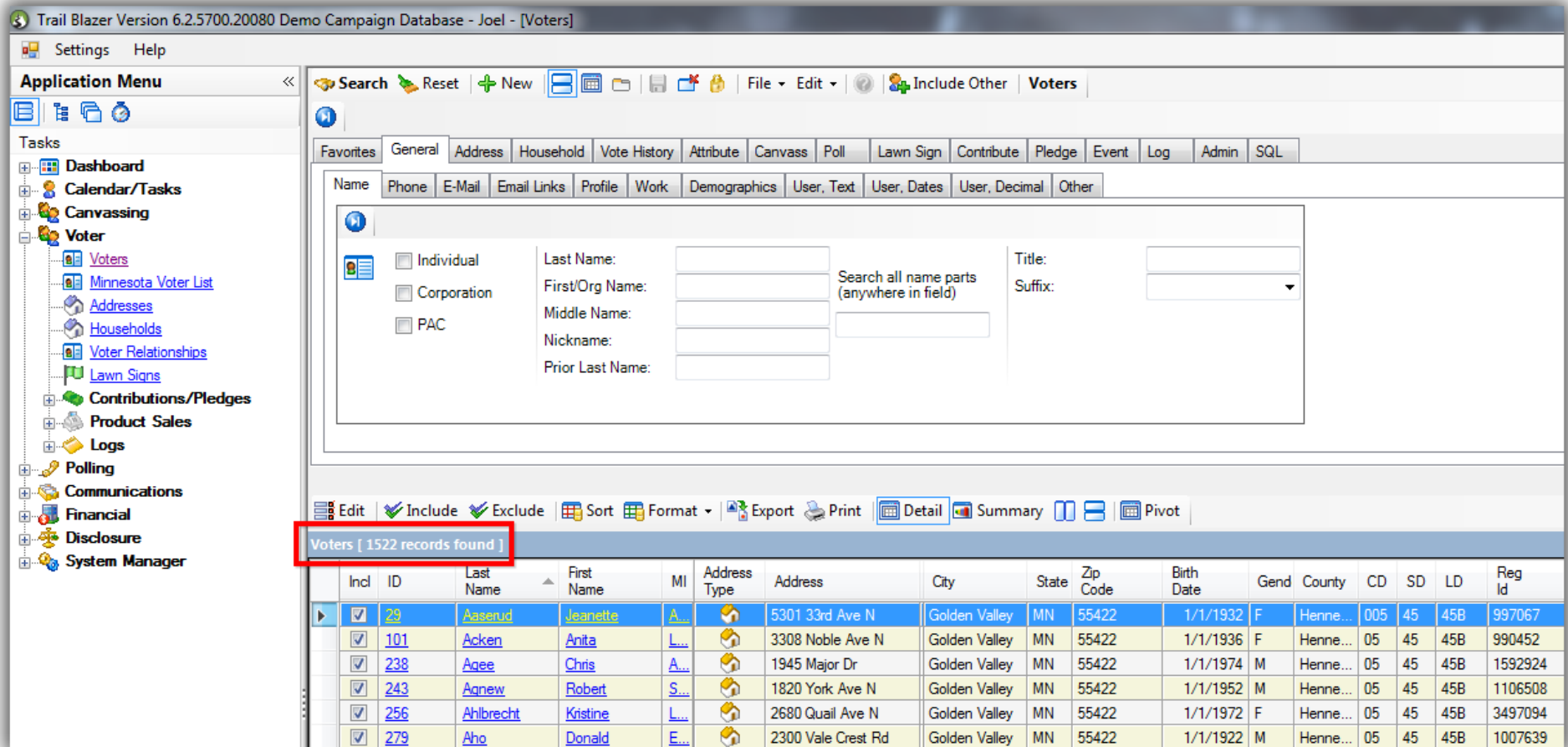
Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

If the user you're filtering access for has previously had access to your database they'll need to close out of **Trail Blazer** and **relaunch** the program before these changes will take effect.

In my example when I log back in after filtering my access by my saved search favorite it limits the amount of voters I can view from about 70k to 1,522 records that meet the saved search criteria.

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

After filtering database access by a saved search query it limits my view of voters from 70k to 1,522.



The screenshot shows the TrailBlazer software interface. On the left is an 'Application Menu' with various categories like 'Tasks', 'Dashboard', 'Calendar/Tasks', 'Canvassing', 'Voter', 'Contributions/Pledges', 'Product Sales', 'Logs', 'Polling', 'Communications', 'Financial', 'Disclosure', and 'System Manager'. The 'Voter' category is expanded, showing sub-items like 'Voters', 'Minnesota Voter List', 'Addresses', 'Households', and 'Voter Relationships'. The main window displays a search and filter interface with tabs for 'General', 'Address', 'Household', 'Vote History', 'Attribute', 'Canvass', 'Poll', 'Lawn Sign', 'Contribute', 'Pledge', 'Event', 'Log', 'Admin', and 'SQL'. Below these are various search criteria fields for Name, Phone, E-Mail, etc. At the bottom, a table of voters is displayed, with a red box highlighting the header 'Voters [1522 records found]'. The table columns include 'Incl', 'ID', 'Last Name', 'First Name', 'MI', 'Address Type', 'Address', 'City', 'State', 'Zip Code', 'Birth Date', 'Gend', 'County', 'CD', 'SD', 'LD', and 'Reg Id'. The first few rows of data are visible.

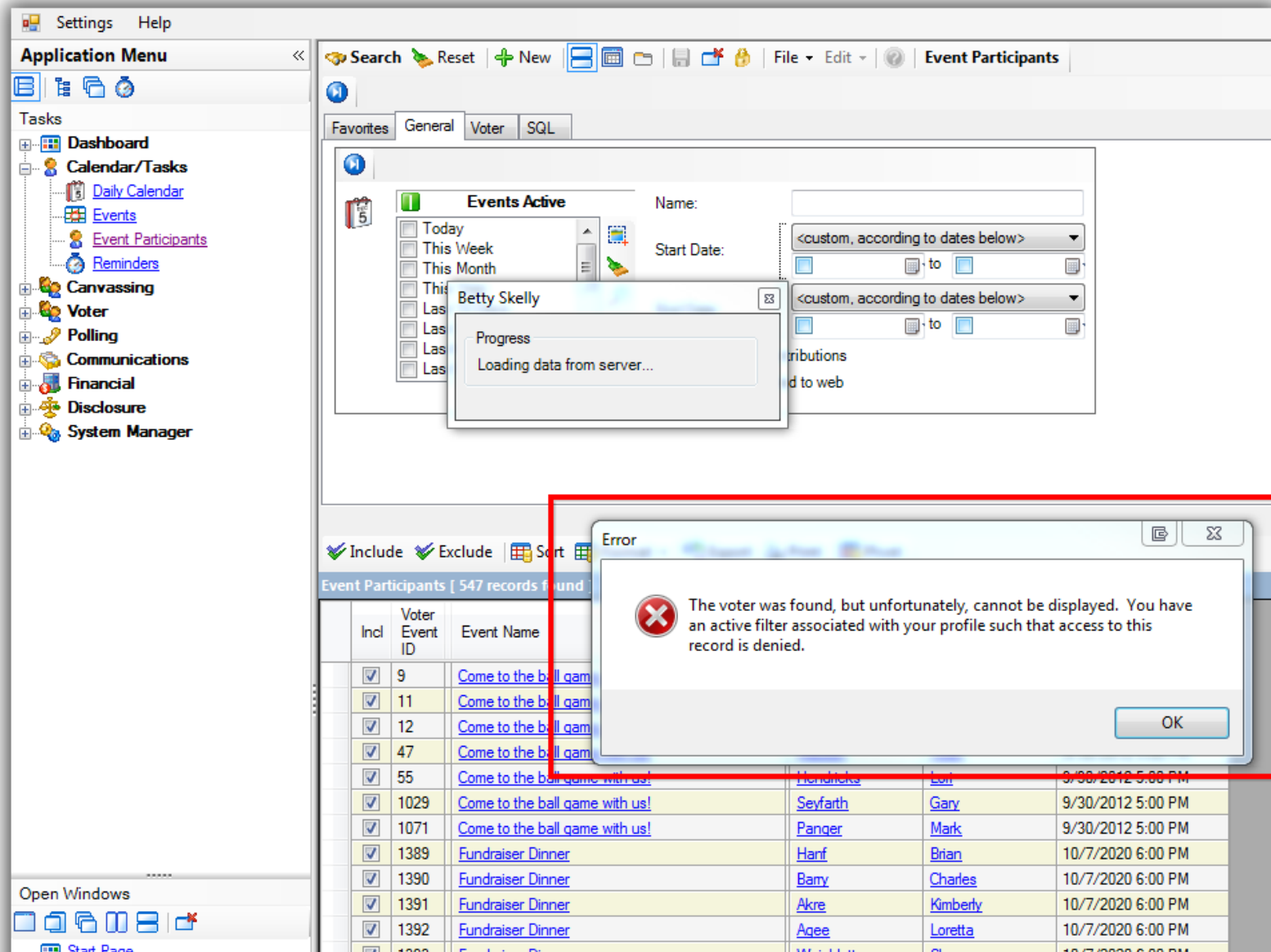
Incl	ID	Last Name	First Name	MI	Address Type	Address	City	State	Zip Code	Birth Date	Gend	County	CD	SD	LD	Reg Id
<input checked="" type="checkbox"/>	29	Aaserud	Jeanette	A...		5301 33rd Ave N	Golden Valley	MN	55422	1/1/1932	F	Henne...	005	45	45B	997067
<input checked="" type="checkbox"/>	101	Acken	Anita	L...		3308 Noble Ave N	Golden Valley	MN	55422	1/1/1936	F	Henne...	05	45	45B	990452
<input checked="" type="checkbox"/>	238	Agee	Chris	A...		1945 Major Dr	Golden Valley	MN	55422	1/1/1974	M	Henne...	05	45	45B	1592924
<input checked="" type="checkbox"/>	243	Agnew	Robert	S...		1820 York Ave N	Golden Valley	MN	55422	1/1/1952	M	Henne...	05	45	45B	1106508
<input checked="" type="checkbox"/>	256	Ahlbrecht	Kristine	L...		2680 Quail Ave N	Golden Valley	MN	55422	1/1/1972	F	Henne...	05	45	45B	3497094
<input checked="" type="checkbox"/>	279	Aho	Donald	E...		2300 Vale Crest Rd	Golden Valley	MN	55422	1/1/1922	M	Henne...	05	45	45B	1007639

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

Important! If the user goes to a different list in the system i.e. Event Participants, Contributions, etc., they'll be able to see a list of contacts that may not be part of your saved search favorite, but if they try to open one of the contact records in the list they'll get an error message like the one below.

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

When trying to open a record in the list that's not part of the user's filtered access they'll get this warning message.



The screenshot shows the TrailBlazer application interface. On the left is the 'Application Menu' with categories like 'Tasks', 'Canvassing', 'Voter', 'Polling', 'Communications', 'Financial', 'Disclosure', and 'System Manager'. The main window is titled 'Event Participants' and has tabs for 'Favorites', 'General', 'Voter', and 'SQL'. A search bar is at the top with 'Search', 'Reset', and '+ New' buttons. Below the search bar is a table of 'Events Active' with columns for 'Name' and 'Start Date'. A record for 'Betty Skelly' is highlighted. A progress dialog box is open over this record, showing 'Progress' and 'Loading data from server...'. Below the table is an 'Error' dialog box with a red 'X' icon and the text: 'The voter was found, but unfortunately, cannot be displayed. You have an active filter associated with your profile such that access to this record is denied.' The table below the error message shows columns for 'Incl', 'Voter ID', 'Event Name', and a date. The table contains several rows of data, including records for 'Come to the ball game' and 'Fundraiser Dinner'.

Incl	Voter ID	Event Name	Date
<input checked="" type="checkbox"/>	9	Come to the ball game	
<input checked="" type="checkbox"/>	11	Come to the ball game	
<input checked="" type="checkbox"/>	12	Come to the ball game	
<input checked="" type="checkbox"/>	47	Come to the ball game	
<input checked="" type="checkbox"/>	55	Come to the ball game with us!	9/30/2012 5:00 PM
<input checked="" type="checkbox"/>	1029	Come to the ball game with us!	9/30/2012 5:00 PM
<input checked="" type="checkbox"/>	1071	Come to the ball game with us!	9/30/2012 5:00 PM
<input checked="" type="checkbox"/>	1389	Fundraiser Dinner	10/7/2020 6:00 PM
<input checked="" type="checkbox"/>	1390	Fundraiser Dinner	10/7/2020 6:00 PM
<input checked="" type="checkbox"/>	1391	Fundraiser Dinner	10/7/2020 6:00 PM
<input checked="" type="checkbox"/>	1392	Fundraiser Dinner	10/7/2020 6:00 PM

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

That completes the steps to filter by a saved favorite.

The next section shows how to filter by **address** data.

#3 Filter Database Access by Address (State, City, County, District...)

Search for and open the user's contact record. *I used myself as an example.*

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

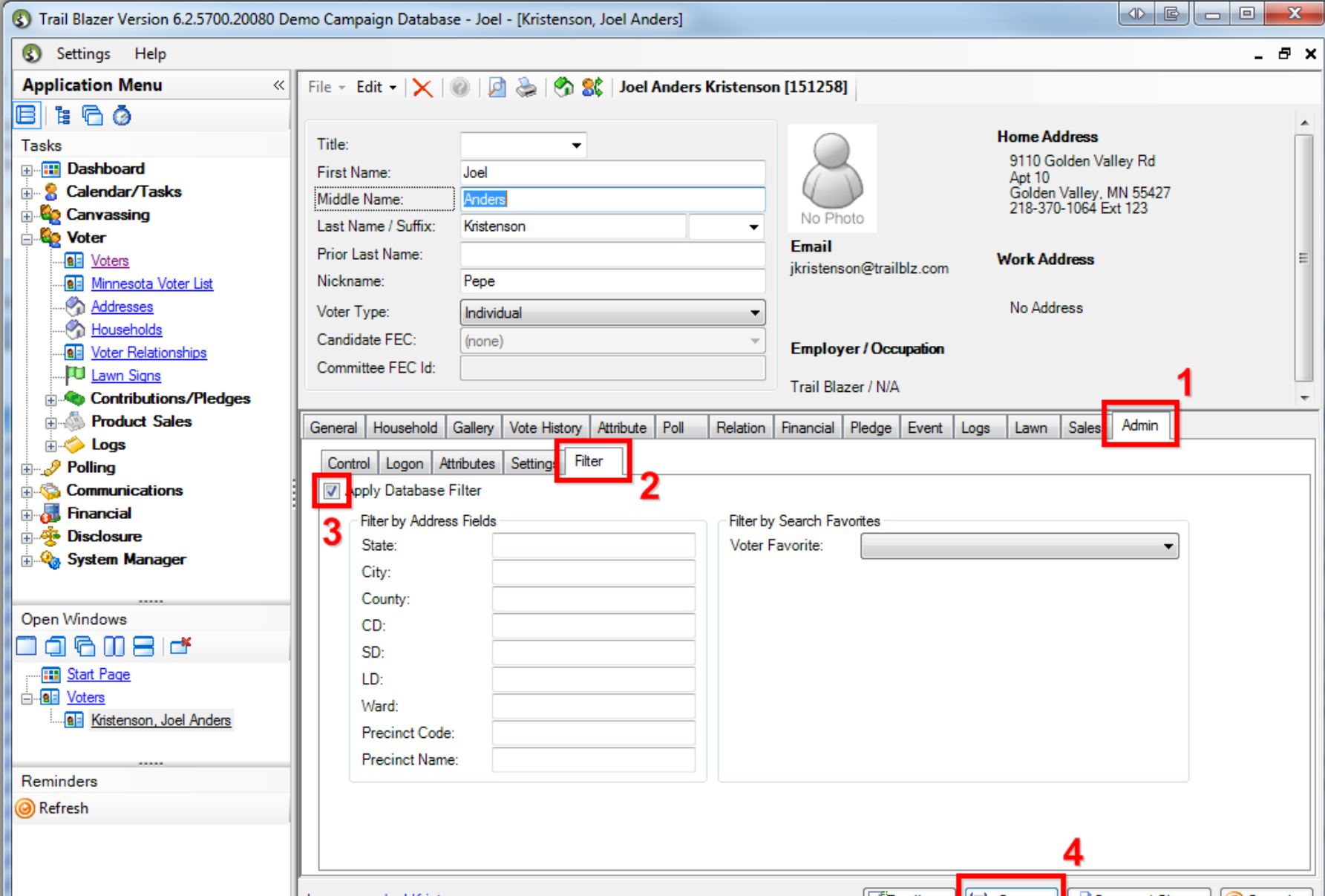
Incl	ID	Last Name	First Name	MI	Address Type	Address	Address Line 2	City	State	Zip Code	Birth Date	Gender	County	CD	SD	LD	Reg Id
<input checked="" type="checkbox"/>	1	Admin	Admin			320 135th St E		Burnsville	MN	55337			Dakota	002	56	56B	
<input checked="" type="checkbox"/>	151258	Kristenson	Joel	Anders		9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427		M	Hennepin	05	46	46A	
<input checked="" type="checkbox"/>	51491	Panzer	Mark	E		600 5th Ave S		Hopkins	MN	55343	1/1/1957	M	Hennepin	05	46	46B	877562
<input checked="" type="checkbox"/>	3																

Click on the name of the user to open their record card.

Navigate to the **Admin > Filter** tab, check the box for **Apply Database Filter**, then click **[Save]**.

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

Applying the database filter in a user's contact record.



The screenshot displays the TrailBlazer software interface for a user's contact record. The window title is "Trail Blazer Version 6.2.5700.20080 Demo Campaign Database - Joel - [Kristenson, Joel Anders]". The left sidebar shows the "Application Menu" with various tasks and sections. The main area displays the contact information for "Joel Anders Kristenson [151258]".

Key elements and annotations:

- 1**: A red box highlights the "Admin" button in the top navigation bar.
- 2**: A red box highlights the "Filter" button in the sub-navigation bar.
- 3**: A red box highlights the "Apply Database Filter" checkbox, which is checked.
- 4**: A red box highlights the "Save" button at the bottom of the interface.

The contact record shows the following details:

- Title:** [Dropdown]
- First Name:** Joel
- Middle Name:** Anders
- Last Name / Suffix:** Kristenson
- Prior Last Name:** [Empty]
- Nickname:** Pepe
- Voter Type:** Individual
- Candidate FEC:** (none)
- Committee FEC Id:** [Empty]
- Home Address:** 9110 Golden Valley Rd, Apt 10, Golden Valley, MN 55427, 218-370-1064 Ext 123
- Work Address:** No Address
- Employer / Occupation:** Trail Blazer / N/A
- Email:** jkristenson@trailblz.com

The "Filter" sub-menu is open, showing options to filter by address fields (State, City, County, CD, SD, LD, Ward, Precinct Code, Precinct Name) and by search favorites (Voter Favorite).

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

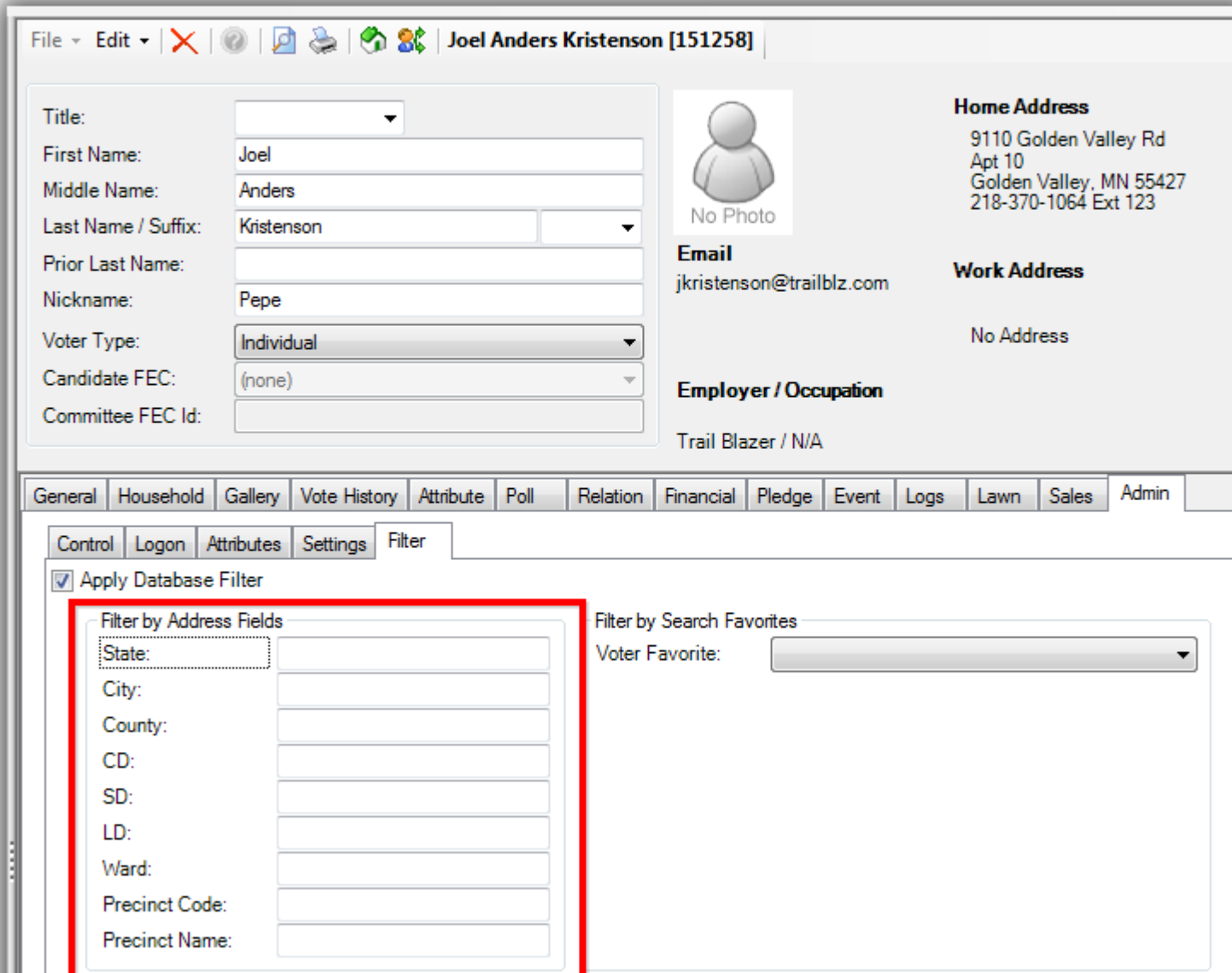
As of the time this article was written there are currently 9 different address fields you can filter a user's security by, they include:

- State
- City
- County
- CD (Congressional District)
- SD (Senate District)
- LD (Legislative District)
- Ward
- Precinct Code
- Precinct Name

Screenshot:

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item


Current list of address fields that a user's access can be filtered by.



The screenshot shows a user profile for Joel Anders Kristenson. The profile includes fields for Title, First Name, Middle Name, Last Name, Prior Last Name, Nickname, Voter Type, Candidate FEC, and Committee FEC Id. It also displays contact information like Home Address, Work Address, and Email, as well as Employer/Occupation. A navigation bar at the bottom contains tabs for various sections, with 'Filter' selected. The 'Filter' tab is active, showing a 'Filter by Address Fields' section with a red border around it. This section contains input fields for State, City, County, CD, SD, LD, Ward, Precinct Code, and Precinct Name. To the right of this section is a 'Filter by Search Favorites' section with a 'Voter Favorite' dropdown menu.

File Edit X ? [Icons] Joel Anders Kristenson [151258]

Title: [Dropdown]
First Name: Joel
Middle Name: Anders
Last Name / Suffix: Kristenson [Dropdown]
Prior Last Name: [Text]
Nickname: Pepe
Voter Type: Individual [Dropdown]
Candidate FEC: (none) [Dropdown]
Committee FEC Id: [Text]

 No Photo
Email: jkristenson@trailblz.com
Employer / Occupation: Trail Blazer / N/A

Home Address
9110 Golden Valley Rd
Apt 10
Golden Valley, MN 55427
218-370-1064 Ext 123

Work Address
No Address

General Household Gallery Vote History Attribute Poll Relation Financial Pledge Event Logs Lawn Sales Admin

Control Logon Attributes Settings Filter

Apply Database Filter

Filter by Address Fields
State: [Text]
City: [Text]
County: [Text]
CD: [Text]
SD: [Text]
LD: [Text]
Ward: [Text]
Precinct Code: [Text]
Precinct Name: [Text]

Filter by Search Favorites
Voter Favorite: [Dropdown]


Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

You have the option to filter by a single field, a combination of fields, and you can also comma separate values e.g. State = MN, WI. *In my example below I filtered user access by MN as the state, and Golden Valley, and Plymouth as the cities.*

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

File Edit [X] [?] [Print] [Refresh] [Home] [Help] Joel Anders Kristenson [151258]

Title: [Dropdown]
First Name: Joel
Middle Name: Anders
Last Name / Suffix: Kristenson [Dropdown]
Prior Last Name: [Text]
Nickname: Pepe
Voter Type: Individual [Dropdown]
Candidate FEC: (none) [Dropdown]
Committee FEC Id: [Text]


No Photo

Home Address
9110 Golden Valley Rd
Apt 10
Golden Valley, MN 55427
218-370-1064 Ext 123

Email
jkristenson@trailblz.com

Work Address
No Address

Employer / Occupation
Trail Blazer / N/A

General Household Gallery Vote History Attribute Poll Relation Financial Pledge Event Logs Lawn Sales Admin

Control Logon Attributes Settings Filter

Apply Database Filter

Filter by Address Fields
State: MN
City: Golden Valley, Plymouth
County: [Text]
CD: [Text]
SD: [Text]
LD: [Text]
Ward: [Text]
Precinct Code: [Text]
Precinct Name: [Text]

Filter by Search Favorites
Voter Favorite: [Dropdown]

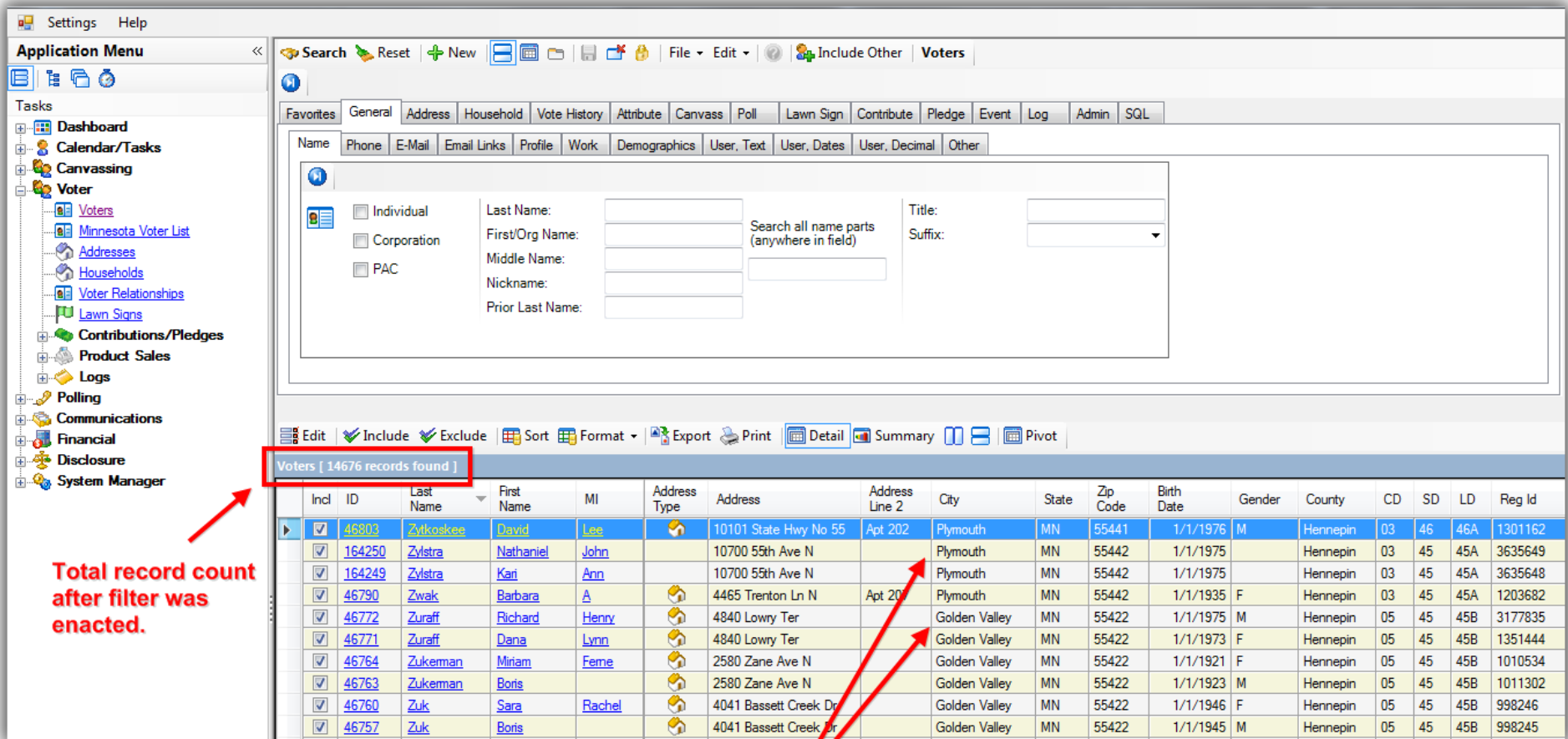
You can comma-separate values if necessary.

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

Click **[Save and Close]** once you're finished. If the user was logged in previously they'll need to relaunch the program for the changes to exist.

In my example it filtered my access from about 70k voter records to 14, 676 voters who live in Minnesota, and either live in Plymouth or Golden Valley, they voted in the last two generals, and their party type is democrat. This could be used as an assigned list for voters that I should be reaching out to for an upcoming election.

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item



The screenshot shows the TrailBlazer application interface. On the left is an 'Application Menu' with various tasks. The main window is titled 'Voters' and contains a search filter. The filter is set to 'Individual' and includes fields for Last Name, First/Org Name, Middle Name, Nickname, and Prior Last Name. There are also fields for Title and Suffix. Below the filter is a toolbar with options like Edit, Include, Exclude, Sort, Format, Export, Print, Detail, Summary, and Pivot. A status bar indicates 'Voters [14676 records found]'. Below this is a table of voter records.

Incl	ID	Last Name	First Name	MI	Address Type	Address	Address Line 2	City	State	Zip Code	Birth Date	Gender	County	CD	SD	LD	Reg Id
<input checked="" type="checkbox"/>	46803	Zytoskee	David	Lee		10101 State Hwy No 55	Apt 202	Plymouth	MN	55441	1/1/1976	M	Hennepin	03	46	46A	1301162
<input checked="" type="checkbox"/>	164250	Zylstra	Nathaniel	John		10700 55th Ave N		Plymouth	MN	55442	1/1/1975		Hennepin	03	45	45A	3635649
<input checked="" type="checkbox"/>	164249	Zylstra	Kan	Ann		10700 55th Ave N		Plymouth	MN	55442	1/1/1975		Hennepin	03	45	45A	3635648
<input checked="" type="checkbox"/>	46790	Zwak	Barbara	A		4465 Trenton Ln N	Apt 20	Plymouth	MN	55442	1/1/1935	F	Hennepin	03	45	45A	1203682
<input checked="" type="checkbox"/>	46772	Zuraff	Richard	Henry		4840 Lowry Ter		Golden Valley	MN	55422	1/1/1975	M	Hennepin	05	45	45B	3177835
<input checked="" type="checkbox"/>	46771	Zuraff	Dana	Lynn		4840 Lowry Ter		Golden Valley	MN	55422	1/1/1973	F	Hennepin	05	45	45B	1351444
<input checked="" type="checkbox"/>	46764	Zukerman	Miriam	Ferne		2580 Zane Ave N		Golden Valley	MN	55422	1/1/1921	F	Hennepin	05	45	45B	1010534
<input checked="" type="checkbox"/>	46763	Zukerman	Boris			2580 Zane Ave N		Golden Valley	MN	55422	1/1/1923	M	Hennepin	05	45	45B	1011302
<input checked="" type="checkbox"/>	46760	Zuk	Sara	Rachel		4041 Bassett Creek Dr		Golden Valley	MN	55422	1/1/1946	F	Hennepin	05	45	45B	998246
<input checked="" type="checkbox"/>	46757	Zuk	Boris			4041 Bassett Creek Dr		Golden Valley	MN	55422	1/1/1945	M	Hennepin	05	45	45B	998245

Total record count after filter was enacted.

Access is now limited to these two cities.

User access is filtered by the state of Minnesota.

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

You're now finished with this section, the next section (#4) talks about filtering by a specific attribute which goes hand-in-hand with filtering by saved favorite but can sometimes be easier to manage.

#4 Filter Database Access by a Specific Attribute – (Nonprofit Example)

This section is very similar to #2 where it requires you to save a **favorite query**, but it walks through a more real-life scenario where many of our customers want to assign donors to a specific 'solicitor' in their database.

For this example I used my **nonprofit** database to filter a user's access by a single attribute item. Prior to these steps you'll need to create an [Attribute Folder, and Attribute Item](#). You'll also need to [save a search query](#) which will pull up anyone who has that specific attribute item checked in their record card. *I used an attribute item in my **Board Member – Assigned Solicitor** folder called "Joel Kristenson".*

Screenshot of my Attribute **Folder/Item**:

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

My Example Solicitor Attribute Folder/Attribute Items

The screenshot shows the TrailBlazer interface with a list of attributes. A red box highlights the 'Board Member - Assigned Solicitor' folder and its sub-items. A red arrow points to the 'Yes' checkbox for Kevin Piatt.

Attribute	Yes	Date From	Date To	Note
Attributes	<input type="checkbox"/>			
Board Member - Assigned Solicitor	<input type="checkbox"/>			
Dan Viehman	<input type="checkbox"/>			
Joel Kristenson	<input type="checkbox"/>			
Kevin Piatt	<input type="checkbox"/>			
Mark Panger	<input type="checkbox"/>			
Patrick Hanf	<input type="checkbox"/>			
Tom Schunk	<input type="checkbox"/>			
Contact Type	<input type="checkbox"/>			
Custom Form Check Boxes and Radio Buttons (Get/Post JS)	<input type="checkbox"/>			
Database Cleanup	<input type="checkbox"/>			
Donor Rating 1-10	<input type="checkbox"/>			
Event Attribute Folder #1	<input type="checkbox"/>			
Hidden Attribute for Custom Get Post JS Form	<input type="checkbox"/>			
Hiking Skill Level	<input type="checkbox"/>			
Junk Folders - Unable to Delete (Reuse)	<input type="checkbox"/>			
Membership Level	<input type="checkbox"/>			
Not (Hide/Archive Record) (System Default)	<input type="checkbox"/>			
Please select your email preferences	<input type="checkbox"/>			
Select A SINGLE Rider to Donate Towards (Peer-to-Peer)	<input type="checkbox"/>			
Source of Record (System Default)	<input type="checkbox"/>			
Volunteer Duties	<input type="checkbox"/>			

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

Screenshot of my **Saved Search Favorite**:

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

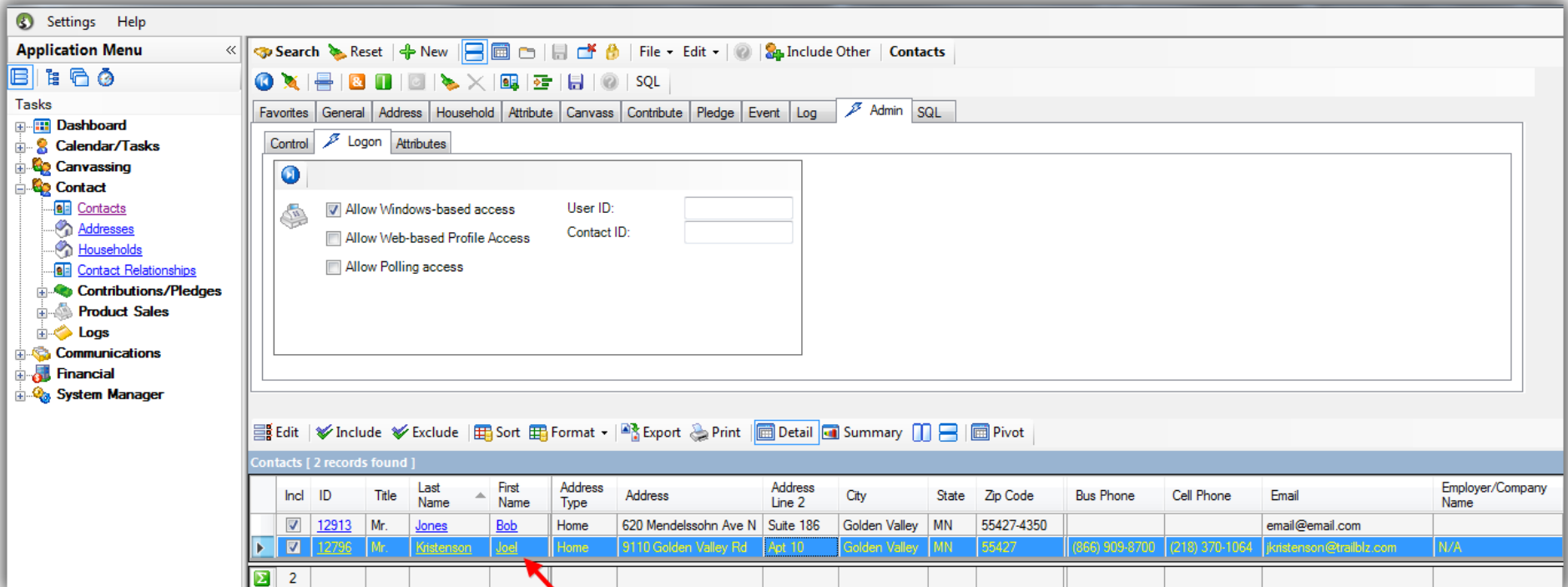
My saved query favorite, currently the record count = 10, but it will increase for every new record that gets tagged with my solicitor attribute.

The screenshot shows the TrailBlazer application interface. On the left is an 'Application Menu' with various task categories. The main window displays a 'Favorite Searches' dialog box with a list of search queries. A red arrow points to the selected query: 'Board Member - Assigned to Solicitor - Joel Kristenson'. Below the dialog, a toolbar includes options like 'Edit', 'Include', 'Exclude', 'Sort', 'Format', 'Export', 'Print', 'Detail', 'Summary', and 'Pivot'. A status bar indicates 'Contacts [10 records found]'. Below this is a table of contact records.

Incl	ID	Title	Last Name	First Name	MI	Address Type	Address	Address Line 2	City	State	Zip Code	Home Phone
<input checked="" type="checkbox"/>	12842		Campaign Services, LLC	Trail Blazer		Home	620 Mendelssohn Ave N	Suite 186	Golden Valley	MN	55427-4350	(123) 456-7890
<input checked="" type="checkbox"/>	1150		Carlson	Gayla	B	Home	2345 Xylon Ave N		Golden Valley	CT	06500	(763) 546-7235
<input checked="" type="checkbox"/>	1603		Damman	Dianne	Marie	Home	1485 Waterford Dr		Golden Valley	CT	06500	(763) 529-9311
<input checked="" type="checkbox"/>	2306		Fortier-Gruidl	Kimberly	Ann	Home	2110 Indiana Ave N		Golden Valley	CT	06500	(763) 529-9119
<input checked="" type="checkbox"/>	2314		Foster	Michael	Clayton	Home	5061 Golden Valley Rd		Golden Valley	CT	06500	(763) 521-9111
<input checked="" type="checkbox"/>	12830		Jones	Bob		Home	620 Mendelssohn Ave N		Golden Valley	MN	55427	(123) 456-7898
<input checked="" type="checkbox"/>	12796	Mr.	Kristenson	Joel		Home	9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427	
<input checked="" type="checkbox"/>	8487		Ult	Karen	Ruth Hansen	Home	1741 Valders Ave N		Golden Valley	MN	55427	(763) 544-7538
<input checked="" type="checkbox"/>	8806		Weiss	Thomas	Phillip	Home	1649 St Croix Cir		Golden Valley	MN	55422	(763) 522-9419
<input checked="" type="checkbox"/>	9120		Yeman	Tara	Sue	Home	3301 Quail Ave N		Golden Valley	CT	06500	(763) 529-9112
	10											

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

Once you've taken care of those steps you'll search for, and open the user's contact record you're filtering access for. *Once again I used my own record (Joel Kristenson) for this example.*



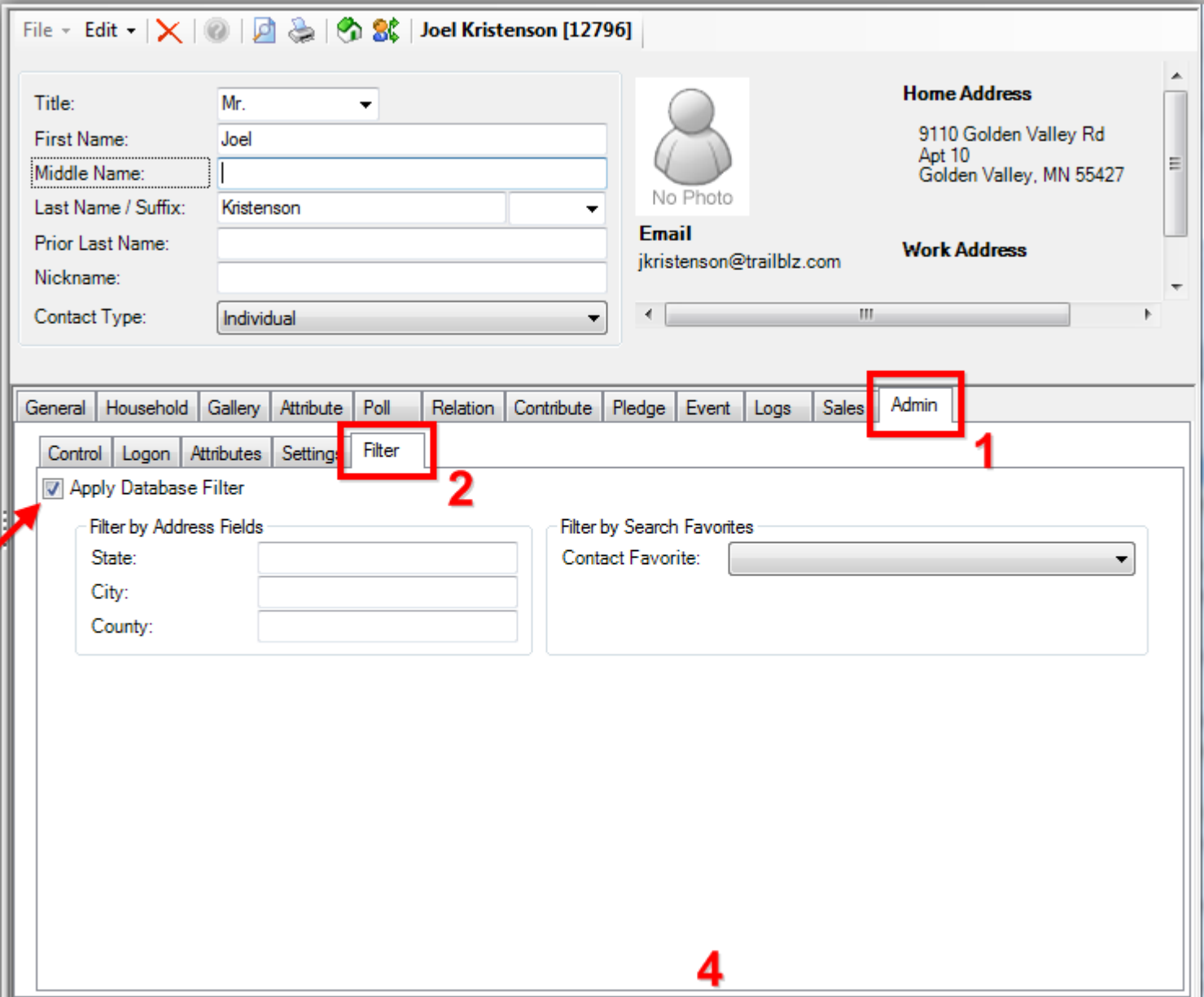
The screenshot shows the TrailBlazer application interface. On the left is an 'Application Menu' with various tasks like Dashboard, Calendar/Tasks, and Contacts. The main window is titled 'Contacts' and has tabs for 'General', 'Address', 'Household', 'Attribute', 'Canvass', 'Contribute', 'Pledge', 'Event', 'Log', 'Admin', and 'SQL'. The 'Admin' tab is active, showing a 'Control' section with checkboxes for 'Allow Windows-based access', 'Allow Web-based Profile Access', and 'Allow Polling access'. Below this is a table of contacts with 2 records found. A red arrow points to the name 'Joel' in the first name column of the second record.

Incl	ID	Title	Last Name	First Name	Address Type	Address	Address Line 2	City	State	Zip Code	Bus Phone	Cell Phone	Email	Employer/Company Name
<input checked="" type="checkbox"/>	12913	Mr.	Jones	Bob	Home	620 Mendelssohn Ave N	Suite 186	Golden Valley	MN	55427-4350			email@email.com	
<input checked="" type="checkbox"/>	12796	Mr.	Kristenson	Joel	Home	9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427	(866) 909-8700	(218) 370-1064	jkristenson@trailblz.com	N/A

Click on the users record name to open their record card.

Navigate to the **Admin > Filter** tab, check the box for '**Apply Database Filter**', and click **[Save]**.

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

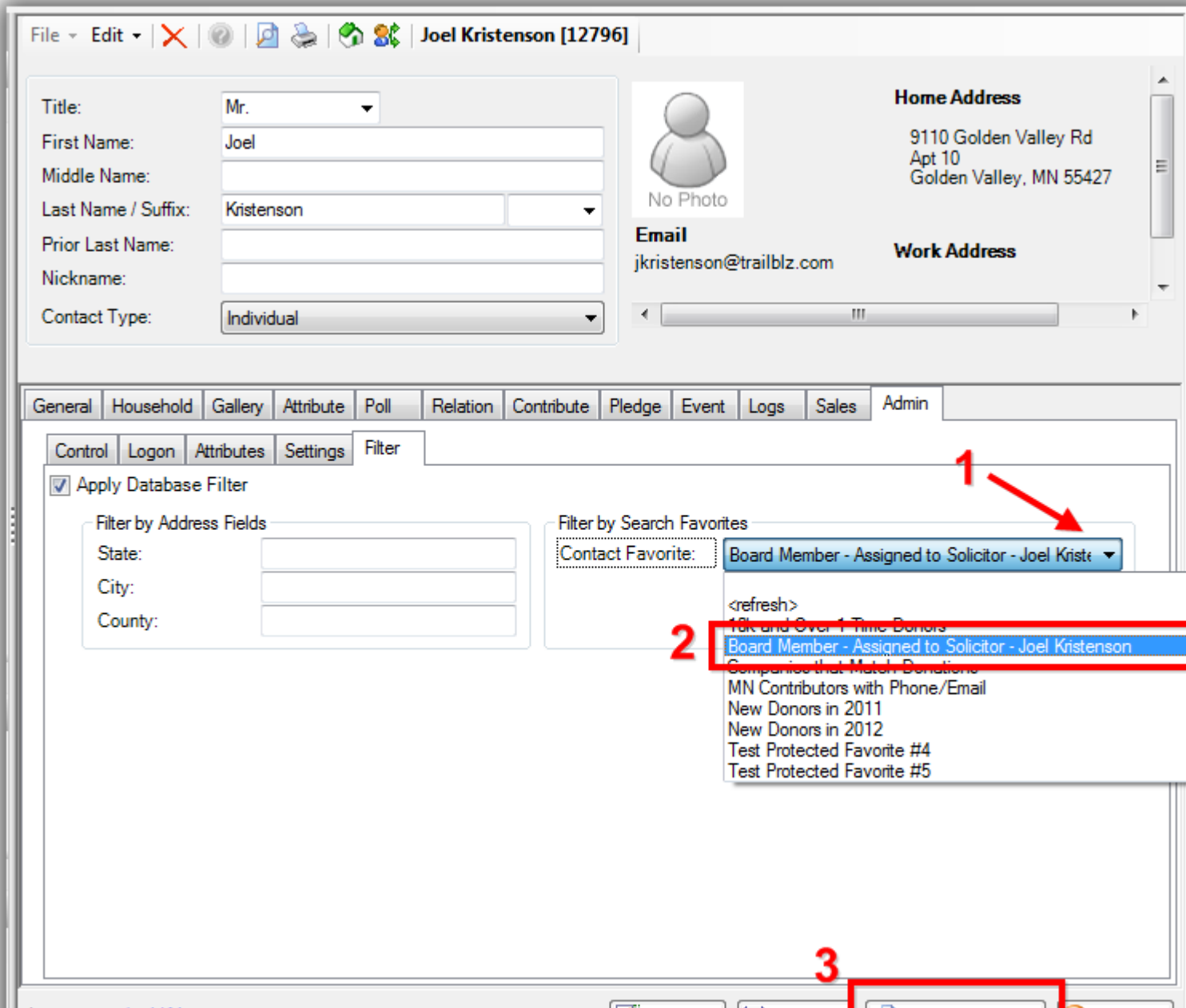


The screenshot shows the TrailBlazer software interface for a user profile. The profile information for Joel Kristenson [12796] includes fields for Title (Mr.), First Name (Joel), Middle Name, Last Name / Suffix (Kristenson), Prior Last Name, Nickname, and Contact Type (Individual). It also displays Home Address (9110 Golden Valley Rd, Apt 10, Golden Valley, MN 55427) and Email (jkristenson@trailblz.com). The interface has a menu bar with options: General, Household, Gallery, Attribute, Poll, Relation, Contribute, Pledge, Event, Logs, Sales, and Admin. Below the menu bar, there are sub-menus: Control, Logon, Attributes, Settings, and Filter. The Filter sub-menu is highlighted with a red box and a red number 1. The Filter sub-menu is expanded, showing a checked checkbox for 'Apply Database Filter' (highlighted with a red box and a red number 2). Below this, there are two filter sections: 'Filter by Address Fields' with input fields for State, City, and County, and 'Filter by Search Favorites' with a dropdown menu for Contact Favorite. A red arrow points to the 'Apply Database Filter' checkbox with a red number 3. At the bottom of the interface, there is a red box around a button with a red number 4.

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

Select your saved favorite query from the drop-down, and click **[Save and Close]** once finished.

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item



The screenshot displays the TrailBlazer software interface. At the top, a menu bar includes 'File', 'Edit', and a toolbar with various icons. The main window title is 'Joel Kristenson [12796]'. Below this, a contact profile is shown with fields for Title (Mr.), First Name (Joel), Middle Name, Last Name / Suffix (Kristenson), Prior Last Name, Nickname, and Contact Type (Individual). A 'No Photo' placeholder is visible. To the right, the 'Home Address' is listed as '9110 Golden Valley Rd, Apt 10, Golden Valley, MN 55427', and the 'Email' is 'jkristenson@trailblz.com'. Below the profile, a series of tabs are visible: General, Household, Gallery, Attribute, Poll, Relation, Contribute, Pledge, Event, Logs, Sales, and Admin. The 'Filter' tab is active, showing a sub-menu with 'Control', 'Logon', 'Attributes', 'Settings', and 'Filter'. The 'Apply Database Filter' checkbox is checked. Under 'Filter by Address Fields', there are input boxes for State, City, and County. Under 'Filter by Search Favorites', a dropdown menu is open, showing a list of saved search queries. A red arrow labeled '1' points to the dropdown menu. A red box labeled '2' highlights the selected item, 'Board Member - Assigned to Solicitor - Joel Kristenson'. A red box labeled '3' highlights the bottom of the dropdown menu.

Joel Kristenson [12796]

Title: Mr.
First Name: Joel
Middle Name:
Last Name / Suffix: Kristenson
Prior Last Name:
Nickname:
Contact Type: Individual

Home Address
9110 Golden Valley Rd
Apt 10
Golden Valley, MN 55427

No Photo
Email
jkristenson@trailblz.com

Work Address

General Household Gallery Attribute Poll Relation Contribute Pledge Event Logs Sales Admin

Control Logon Attributes Settings Filter

Apply Database Filter

Filter by Address Fields
State:
City:
County:

Filter by Search Favorites
Contact Favorite: Board Member - Assigned to Solicitor - Joel Kristenson

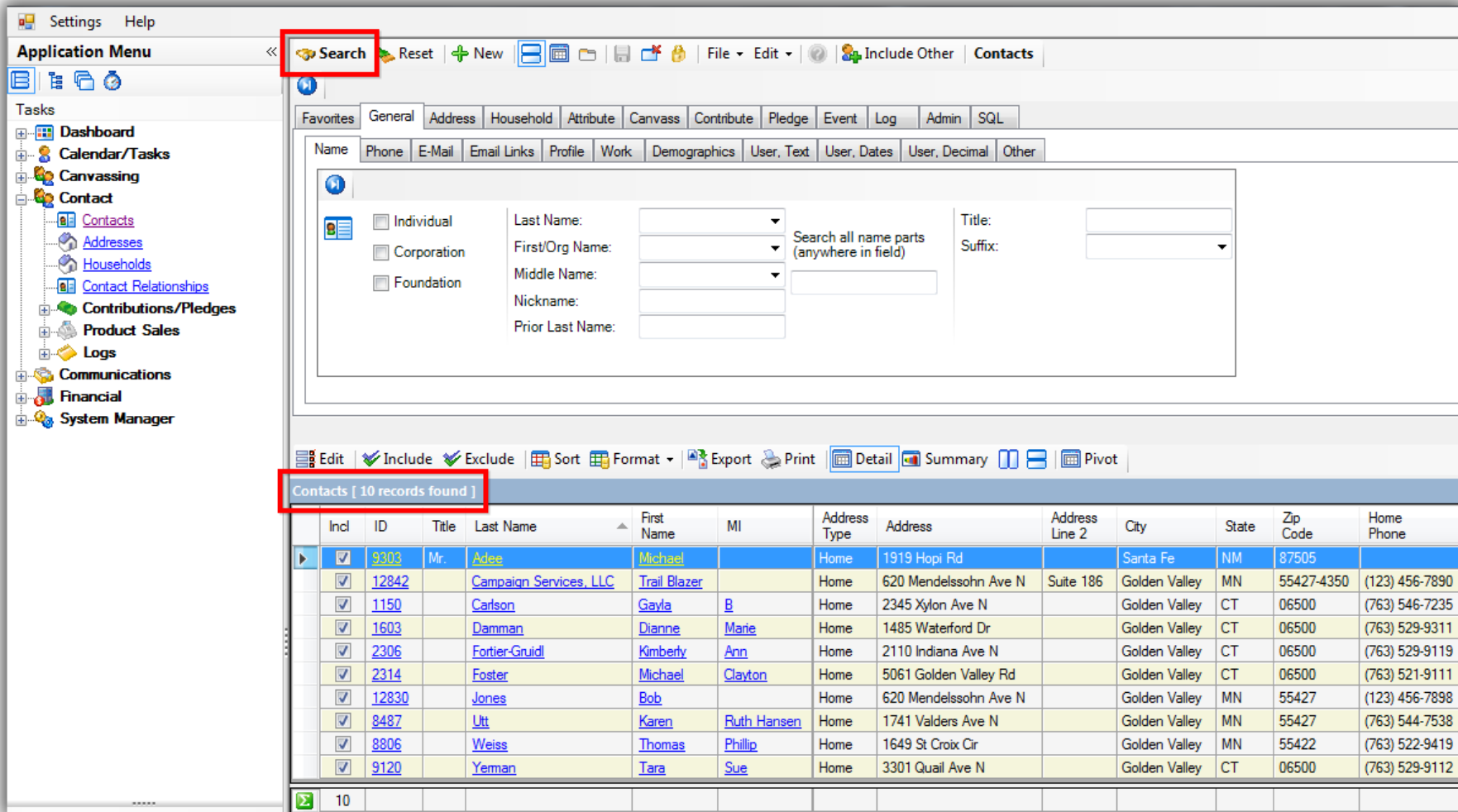
<refresh>
18k and Over 1-Time Donors
Board Member - Assigned to Solicitor - Joel Kristenson
Companies that Match Donations
MN Contributors with Phone/Email
New Donors in 2011
New Donors in 2012
Test Protected Favorite #4
Test Protected Favorite #5

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

The user you're filtering access for will need to close and relaunch the program. *In my example my access to the database of contacts has gone from about 5k to the 10 donors that are tagged with the attribute item I filtered by.*

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

When running a search on my entire database after access has been filtered by a specific attribute I now can only work with the 10 donor records that were assigned to me.



The screenshot shows the TrailBlazer application interface. The 'Search' button is highlighted with a red box. Below it, the search filter is set to 'Individual'. The search results are displayed in a table with 10 records found, also highlighted with a red box. The table columns include: Incl, ID, Title, Last Name, First Name, MI, Address Type, Address, Address Line 2, City, State, Zip Code, and Home Phone.

Incl	ID	Title	Last Name	First Name	MI	Address Type	Address	Address Line 2	City	State	Zip Code	Home Phone
<input checked="" type="checkbox"/>	9303	Mr.	Adee	Michael		Home	1919 Hopi Rd		Santa Fe	NM	87505	
<input checked="" type="checkbox"/>	12842		Campaign Services, LLC	Trail Blazer		Home	620 Mendelssohn Ave N	Suite 186	Golden Valley	MN	55427-4350	(123) 456-7890
<input checked="" type="checkbox"/>	1150		Carlson	Gayla	B	Home	2345 Xylon Ave N		Golden Valley	CT	06500	(763) 546-7235
<input checked="" type="checkbox"/>	1603		Damman	Dianne	Marie	Home	1485 Waterford Dr		Golden Valley	CT	06500	(763) 529-9311
<input checked="" type="checkbox"/>	2306		Fortier-Gnuidl	Kimberly	Ann	Home	2110 Indiana Ave N		Golden Valley	CT	06500	(763) 529-9119
<input checked="" type="checkbox"/>	2314		Foster	Michael	Clayton	Home	5061 Golden Valley Rd		Golden Valley	CT	06500	(763) 521-9111
<input checked="" type="checkbox"/>	12830		Jones	Bob		Home	620 Mendelssohn Ave N		Golden Valley	MN	55427	(123) 456-7898
<input checked="" type="checkbox"/>	8487		Utt	Karen	Ruth Hansen	Home	1741 Valdars Ave N		Golden Valley	MN	55427	(763) 544-7538
<input checked="" type="checkbox"/>	8806		Weiss	Thomas	Phillip	Home	1649 St Croix Cir		Golden Valley	MN	55422	(763) 522-9419
<input checked="" type="checkbox"/>	9120		Yerman	Tara	Sue	Home	3301 Quail Ave N		Golden Valley	CT	06500	(763) 529-9112
<input checked="" type="checkbox"/>	10											

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

If other contact records in the database get 'tagged' with the attribute that powers your saved search query, or vice versa (*have the attribute removed*), then the list of records will grow or shrink accordingly. **It requires that the user logs out and back into the database for the changes to take effect.**



Trail Blazer™

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

#5 Related Resources

Article: [Adding a Database User and Setting Security Settings](#)

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

Article: [Creating an Attribute Folder and Attribute Items](#)

Article: [Mobile Base Camp – Mobile Canvassing](#)

Article: [Polling – How to Setup and Run a Poll](#)

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

Video: [Mobile Canvassing](#)

3rd Party Resource (Tool): [Map Point](#)

Trail Blazer Live Support

☎ **Phone:** 1-866-909-8700

✉ **Email:** support@trailblz.com

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

t **Twitter:** <https://twitter.com/trailblazersoft>

Filter Database Access for Different Users by things like Address, A Saved Search Query, and a Specific Attribute Item

** 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.*