

# How to Rename User Fields, Query by Them, Add Them to the Grid as Columns, and Utilizing Them as Merge Fields in Letter & E-Mail Templates

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## Overview

This article walks through the steps to **change the names** of the **user field labels** for your database, **search** by them, **report** (*format*) on them, and utilize them as **merge fields** in the letter/email templates you create.

 **Tip:** Customers use custom user fields for all kinds of different things, some examples would include:

- Graduation Year
- Ask Amount
- Last Contact Date
- Next Contact Date
- School Attended
- Ethnicity
- Church Affiliation

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- Salary
- Religion
- Language

## **Outline**

**#1** Rename Custom User Fields

**#2** Query (Search) by Custom User Fields

**#3** Add User Fields into the Grid as Columns & Make them Updateable in the Grid View

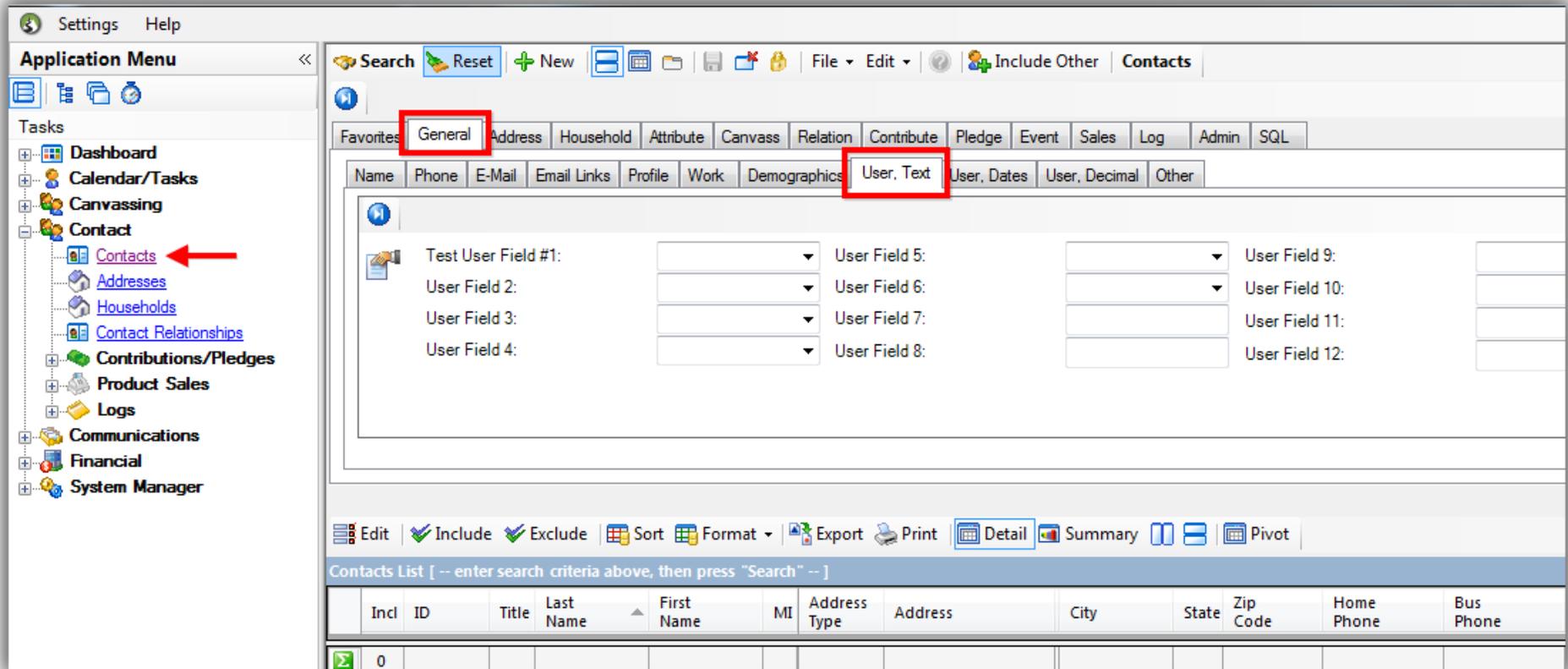
**#4** Utilize User Fields as Merge Fields in your Letter & E-Mail Templates

**#5** Related Resources

## **#1 – Rename Custom User Fields**

Navigate to the **Contacts** (*Donors/Voters*) list, and the **General > User, Text** tab.

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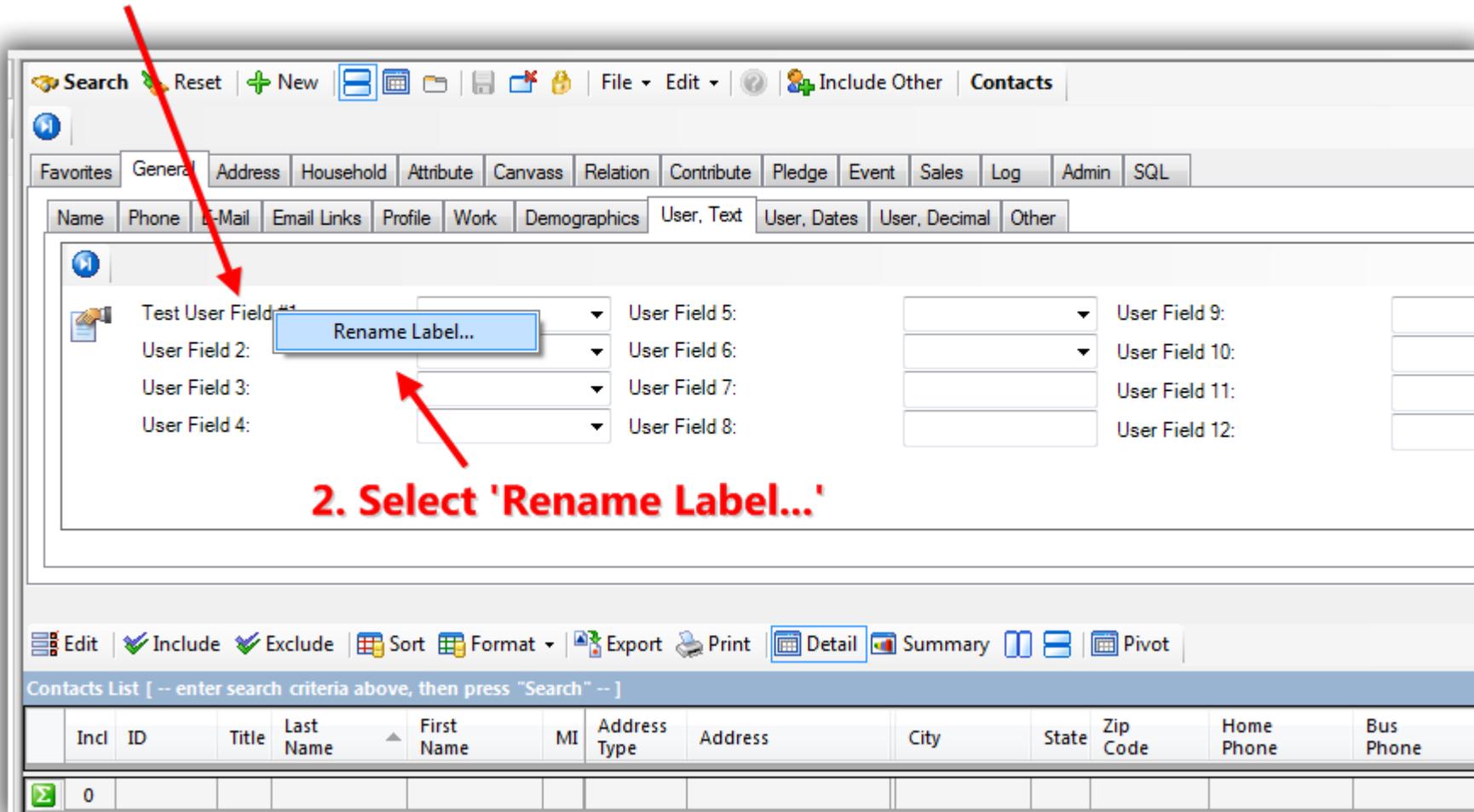


The different places you can rename user fields are from the **search panel** (as shown below), within a **contact's record** card, or by using the [customize labels list](#). In my example I chose to do it from the search panel.

Right-click on the user field label and select 'Rename Label...'

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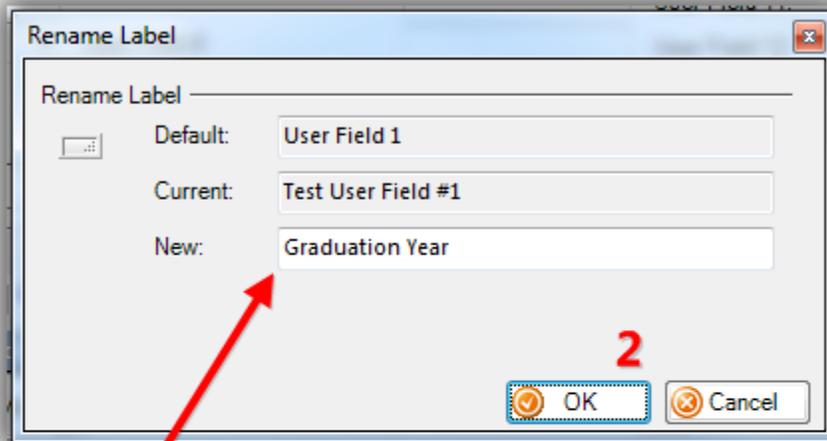
## 1. Right-click on the user field label you want to rename.



The screenshot shows the TrailBlazer software interface. At the top, there is a menu bar with options like Search, Reset, New, File, Edit, and Include Other. Below the menu bar, there are several tabs for different data categories: Favorites, General, Address, Household, Attribute, Canvass, Relation, Contribute, Pledge, Event, Sales, Log, Admin, and SQL. Under the 'General' tab, there are sub-tabs for Name, Phone, E-Mail, Email Links, Profile, Work, Demographics, User, Text, User, Dates, User, Decimal, and Other. The 'User, Text' sub-tab is active, showing a list of user fields: Test User Field #1, User Field 2, User Field 3, User Field 4, User Field 5, User Field 6, User Field 7, User Field 8, User Field 9, User Field 10, User Field 11, and User Field 12. A right-click context menu is open over 'Test User Field #1', with the 'Rename Label...' option highlighted. A red arrow points from the text '1. Right-click on the user field label you want to rename.' to the 'Test User Field #1' label. Another red arrow points from the text '2. Select 'Rename Label...'' to the 'Rename Label...' menu item. At the bottom of the interface, there is a toolbar with options like Edit, Include, Exclude, Sort, Format, Export, Print, Detail, Summary, and Pivot. Below the toolbar, there is a 'Contacts List' section with a search prompt and a table with columns: Incl, ID, Title, Last Name, First Name, MI, Address Type, Address, City, State, Zip Code, Home Phone, and Bus Phone. The table shows one row with '0' in the 'Incl' column.

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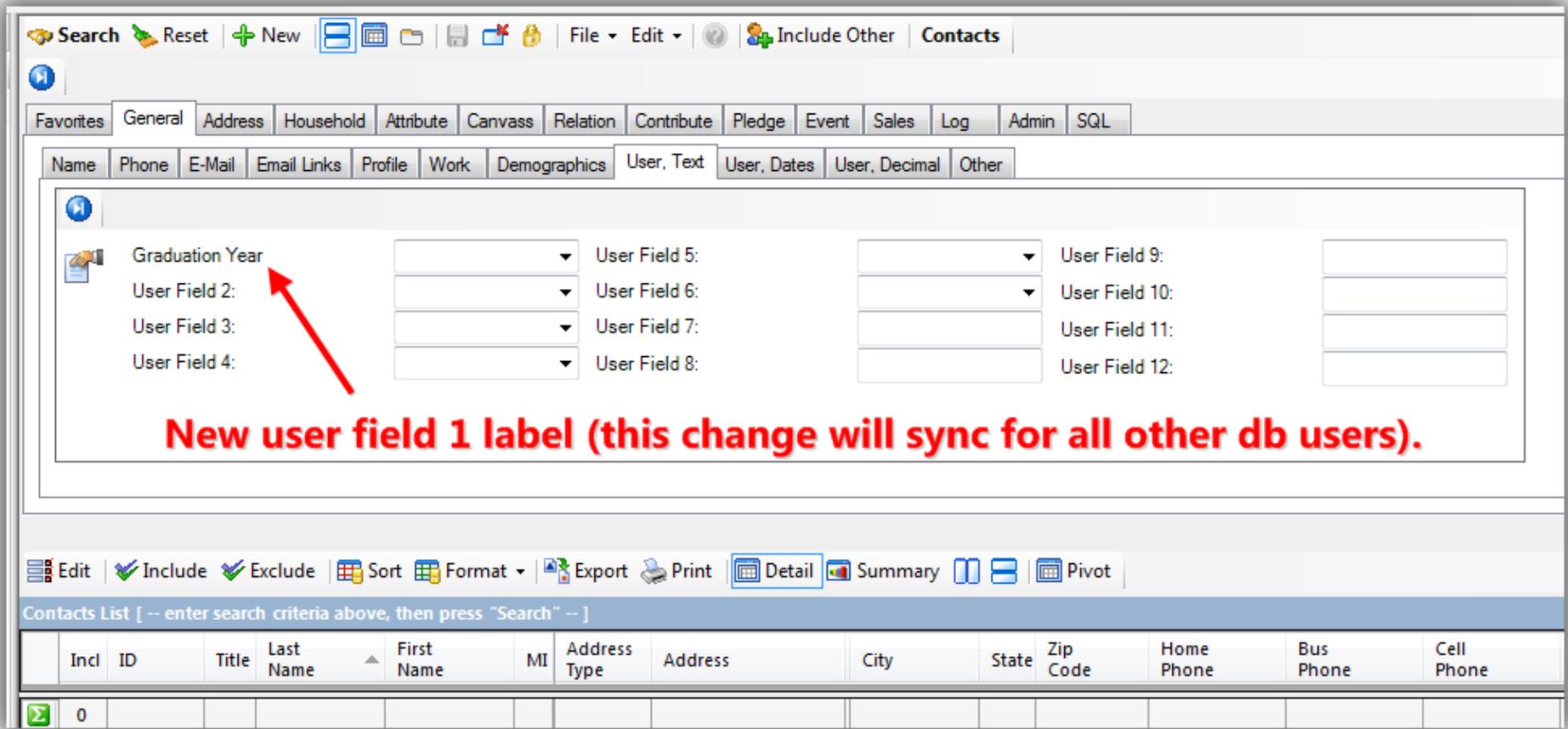
Give the new label a **name**, and click [OK]. *In my example I called my User Field 1 label 'Graduation Year'.*



### **1. Create a new name for your user field.**

The changes will affect all db users. *My finished example is below.*

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The screenshot shows the TrailBlazer software interface. At the top, there is a menu bar with options like Search, Reset, New, File, Edit, and Include Other. Below the menu bar, there are several tabs for different data categories: Favorites, General, Address, Household, Attribute, Canvass, Relation, Contribute, Pledge, Event, Sales, Log, Admin, and SQL. Under the 'General' tab, there are sub-tabs for Name, Phone, E-Mail, Email Links, Profile, Work, Demographics, User, Text, User, Dates, User, Decimal, and Other. The 'User, Text' sub-tab is selected, showing a grid of user fields. The first field is labeled 'Graduation Year' (previously 'User Field 1'), and a red arrow points to it. Below the grid, a red text box contains the text: **New user field 1 label (this change will sync for all other db users).** At the bottom of the interface, there is a toolbar with options like Edit, Include, Exclude, Sort, Format, Export, Print, Detail, Summary, and Pivot. Below the toolbar is a 'Contacts List' section with a search bar and a table with columns: Incl, ID, Title, Last Name, First Name, MI, Address Type, Address, City, State, Zip Code, Home Phone, Bus Phone, and Cell Phone.

Repeat these steps until the user fields you need to modify (*text, date, and decimal*) are changed accordingly. *As of the time this article was written there were 12 user text fields (6 of which offer drop-down menus), 3 user date, and 3 user decimal fields available. My finished example is below where I renamed 10 out of 12 user text fields.*

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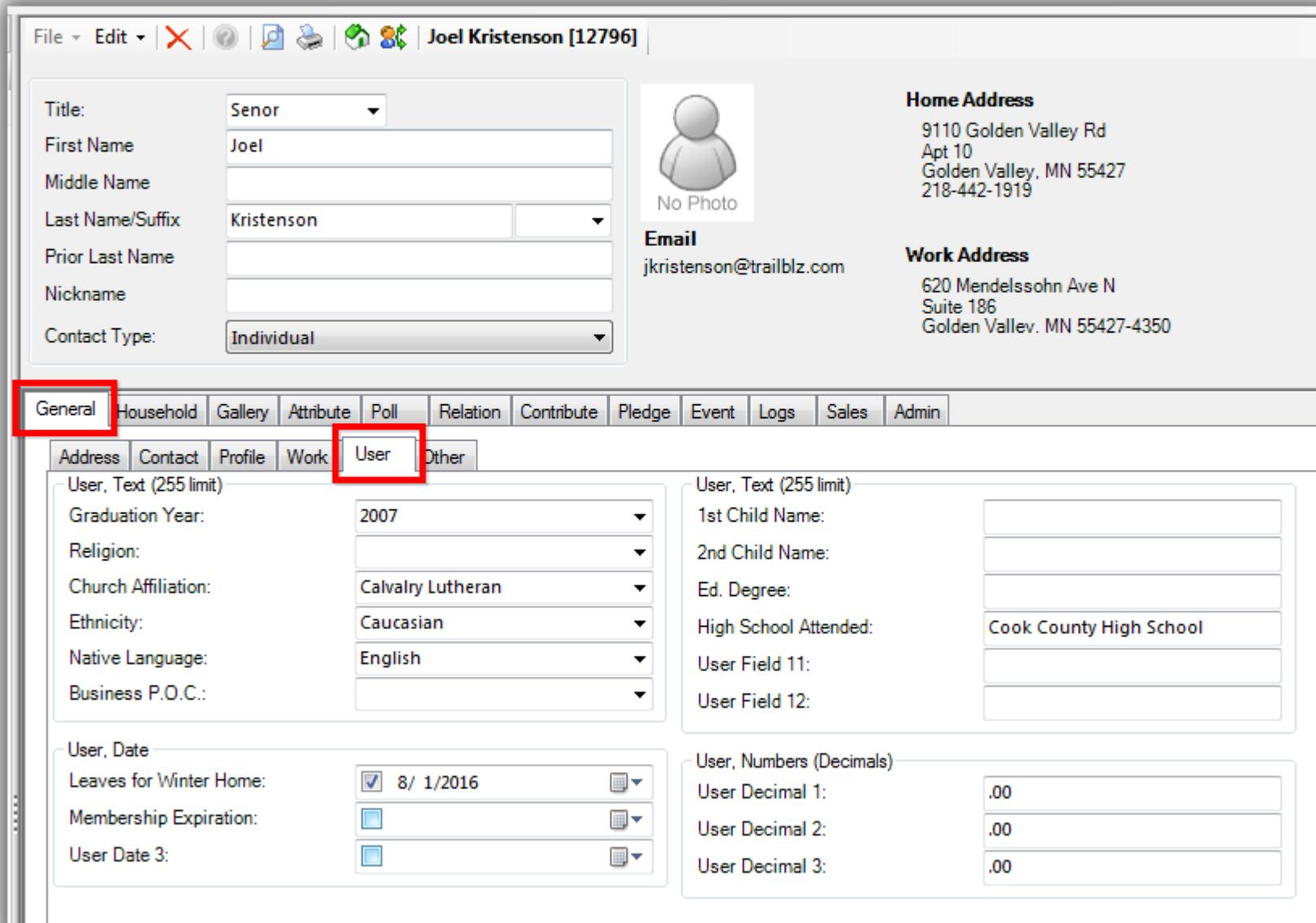
**Ex: 10 out of 12 user text fields renamed.**

**There are more user fields under the 'User, Dates' & 'User, Decimal' fields.**

The screenshot shows the TrailBlazer interface for editing a contact record. The 'General' tab is active, and the 'User' sub-tab is selected. The 'User, Text' sub-tab is highlighted with a red box, showing fields for Graduation Year, Religion, Church Affiliation, Ethnicity, Native Language, Business P.O.C., 1st Child Name, and 2nd Child Name. The 'User, Dates' and 'User, Decimal' sub-tabs are also visible and highlighted with a red box. A red arrow points to these tabs from the text above. The bottom of the screen shows a grid with one row containing the number 0.

If you open a contact's record card you can begin to record the new custom data in your user fields under the **General > User** tabs.

**Once your user fields have been configured you can begin to populate the values under the General > User tabs within a contact's record card.**



The screenshot shows a contact record card for Joel Kristenson [12796]. The card is divided into several sections: Personal Information, Home Address, Work Address, and a tabbed interface for additional details. The 'General' tab is selected, and the 'User' sub-tab is active. The 'User' sub-tab contains several fields for user-specific information, including graduation year, religion, church affiliation, ethnicity, native language, business P.O.C., graduation year, 1st and 2nd child names, education degree, high school attended, and three user-defined decimal fields.

**Personal Information:**

- Title: Senor
- 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, 218-442-1919

**Work Address:** 620 Mendelssohn Ave N, Suite 186, Golden Valley, MN 55427-4350

**Email:** jkristenson@trailblz.com

**General > User Tab Fields:**

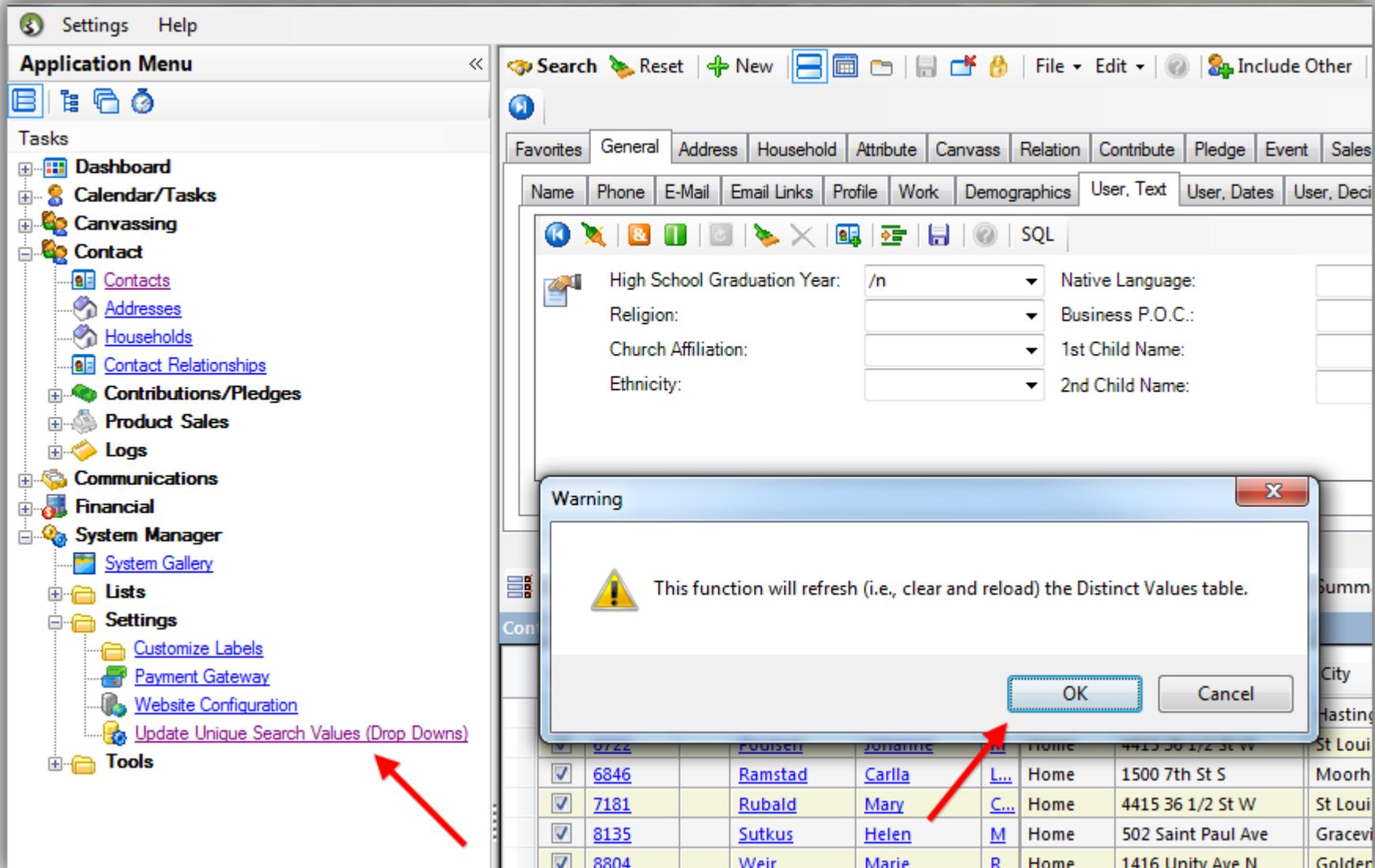
- User, Text (255 limit): Graduation Year: 2007
- Religion:
- Church Affiliation: Calvary Lutheran
- Ethnicity: Caucasian
- Native Language: English
- Business P.O.C.:
- User, Text (255 limit): 1st Child Name: , 2nd Child Name: , Ed. Degree: , High School Attended: Cook County High School
- User Field 11: , User Field 12:
- User, Date: Leaves for Winter Home:  8/ 1/2016, Membership Expiration: , User Date 3:
- User, Numbers (Decimals): User Decimal 1: .00, User Decimal 2: .00, User Decimal 3: .00

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As new values are added to your user fields, you'll periodically want to update the unique search value (drop-downs) within your system by following **Application Menu > System Manager > Settings > Update Unique Search Value (Drop Downs)...**

## How to Rename User Fields, Query by Them, Add Them to the Grid as Columns, and Utilizing Them as Merge Fields in Letter & E-Mail Templates



The screenshot displays the TrailBlazer application interface. On the left, the 'Application Menu' is visible, with a red arrow pointing to the 'Update Unique Search Values (Drop Downs)' option under the 'Settings' folder. The main window shows a 'User' profile form with fields for 'High School Graduation Year', 'Religion', 'Church Affiliation', 'Ethnicity', 'Native Language', 'Business P.O.C.', '1st Child Name', and '2nd Child Name'. A 'Warning' dialog box is overlaid on the form, containing a yellow warning icon and the text: 'This function will refresh (i.e., clear and reload) the Distinct Values table.' The dialog has 'OK' and 'Cancel' buttons. A red arrow points from the 'Update Unique Search Values (Drop Downs)' menu item to the 'OK' button in the warning dialog. Below the dialog, a table of user records is partially visible.

Phone	First Name	Last Name	Address	City
6846	Ramstad	Carlla	1500 7th St S	Moorh
7181	Rubald	Mary	4415 36 1/2 St W	St Loui
8135	Sutkus	Helen	502 Saint Paul Ave	Gracevi
8804	Weir	Marie	1416 Unity Ave N	Golder

## #2 – Query (Search) by Custom User Fields

You can now run your search queries by the user fields as you begin to populate data into those fields. *My example is below where I queried for everyone in my database who graduated high school in 1970 which produced **180** results.*

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## Example query by custom user text fields.

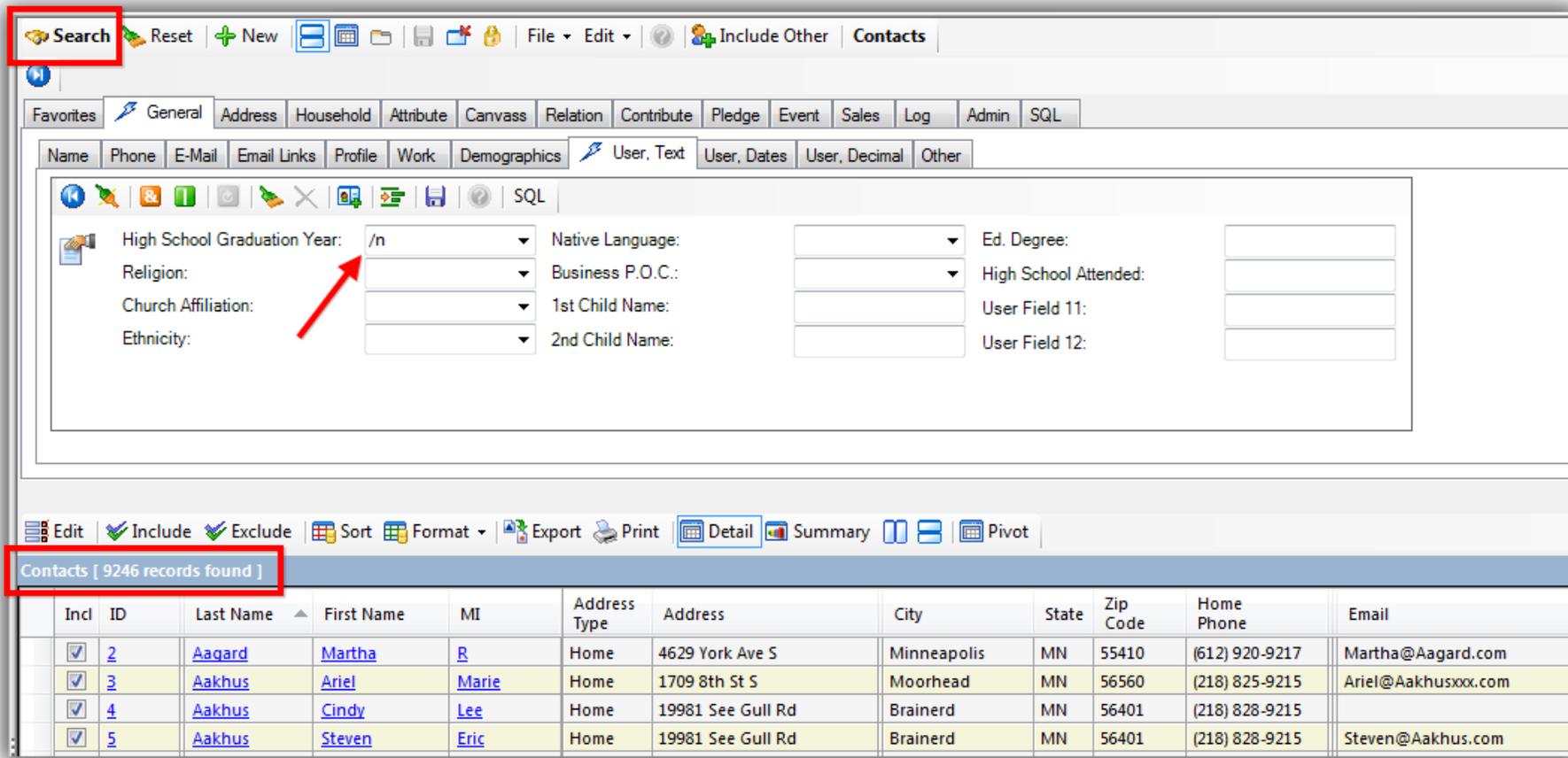
The screenshot shows the TrailBlazer interface with a query builder window open. The 'Contacts' menu item is highlighted with a red arrow and the number 1. The 'User, Text' field in the query builder is highlighted with a red box and the number 2. The 'Search' button in the top toolbar is highlighted with a red box and the number 3. Below the query builder, a table displays the results of the query, showing 180 records found. The table columns include Incl, ID, Last Name, First Name, MI, Address Type, Address, City, State, Zip Code, Home Phone, and Email.

Incl	ID	Last Name	First Name	MI	Address Type	Address	City	State	Zip Code	Home Phone	Email
<input checked="" type="checkbox"/>	10	Abbott	Steven	William	Home	5533 Concord Ave	Edina	MN	55424	(952) 929-9217	
<input checked="" type="checkbox"/>	35	Adams	Benito		Home	2403 Ethel Ave	Albert Lea	MN	56007	(507) 720-9314	
<input checked="" type="checkbox"/>	94	Allmann	Christine	Marie	Home	183 Malcolm Ave SE	Minneapolis	MN	55414	(612) 331-8321	Christine@Allmann.com
<input checked="" type="checkbox"/>	100	Alto	Bradley	C	Home	3301 State Hwy No 169	Plymouth	MN	55441	(218) 741-7232	
<input checked="" type="checkbox"/>	168	Anderson	Kari	Lisanne	Home	2010 Knollwood Dr	Fairmont	MN	56031	(507) 235-8124	Kari@Anderson.com
<input checked="" type="checkbox"/>	190	Anderson	Michael	Einar	Home	312 33rd St W	Minneapolis	MN	55408	(651) 646-7935	
<input checked="" type="checkbox"/>	312	Baccam	Rhonda	Sue	Home	15589 Avocet St NW	Andover	MN	55304	(763) 434-8922	
<input checked="" type="checkbox"/>	375	Barnett	Erin	Maureen	Home	809 Linden St S	Northfield	MN	55057	(507) 645-7432	Erin@Barnett.com

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**Tip:** You can utilize [sql wildcard search queries](#) to find records where they 'have a user field present' or are 'missing a user field'. For instance, to find everyone in my database that *has* a high school graduation date I entered /n for 'not blank' in that field which provided 9,246 records:

**Tip: Example query using sql wildcards to find all records that 'have' data in a certain user field.**



The screenshot shows the TrailBlazer interface with a search query entered: "High School Graduation Year: /n". A red arrow points to the search field. Below the search area, a status bar indicates "Contacts [ 9246 records found ]". The results are displayed in a table with the following columns: Incl, ID, Last Name, First Name, MI, Address Type, Address, City, State, Zip Code, Home Phone, and Email.

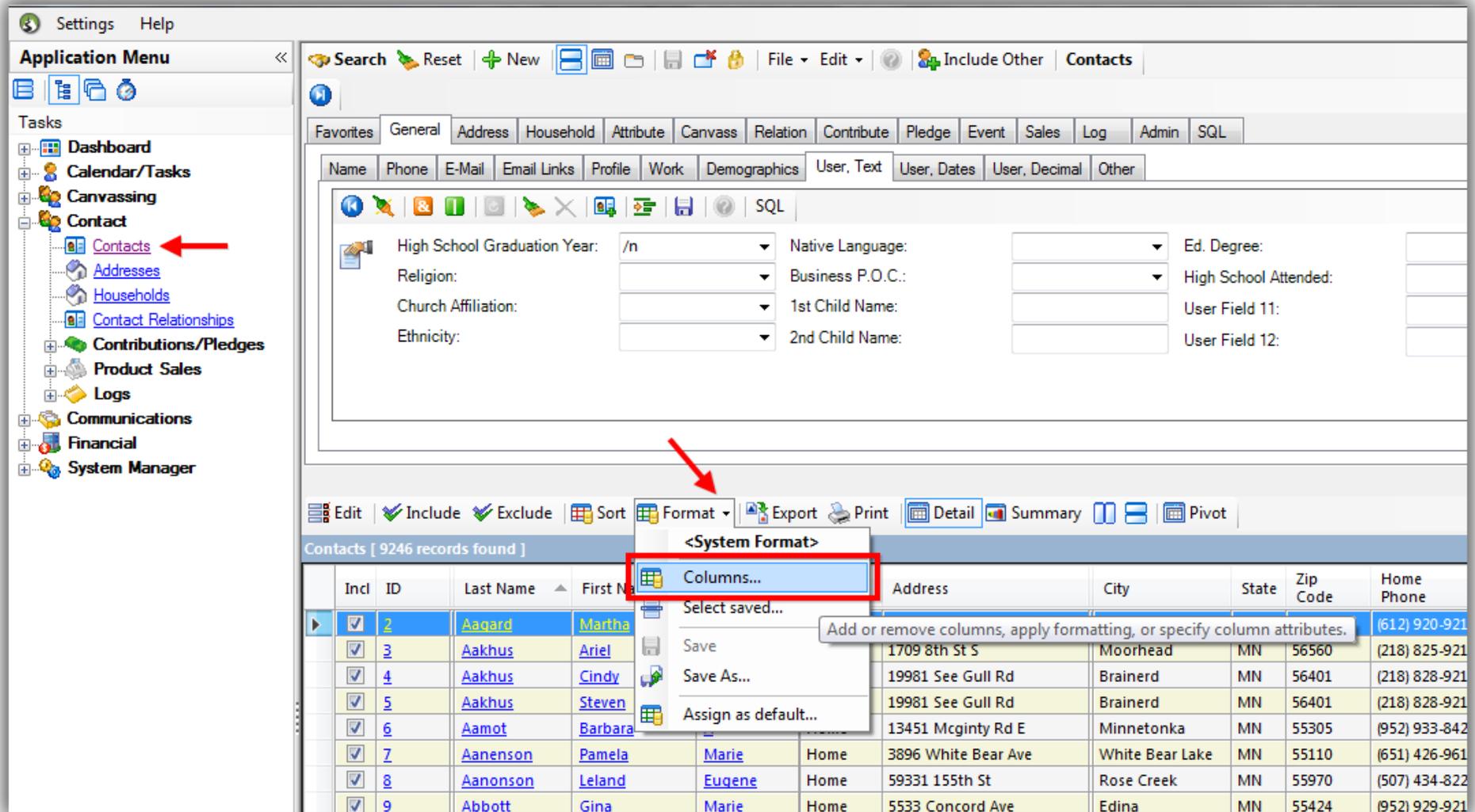
Incl	ID	Last Name	First Name	MI	Address Type	Address	City	State	Zip Code	Home Phone	Email
<input checked="" type="checkbox"/>	2	Aagard	Martha	R	Home	4629 York Ave S	Minneapolis	MN	55410	(612) 920-9217	Martha@Aagard.com
<input checked="" type="checkbox"/>	3	Aakhus	Ariel	Marie	Home	1709 8th St S	Moorhead	MN	56560	(218) 825-9215	Ariel@Aakhusxxx.com
<input checked="" type="checkbox"/>	4	Aakhus	Cindy	Lee	Home	19981 See Gull Rd	Brainerd	MN	56401	(218) 828-9215	
<input checked="" type="checkbox"/>	5	Aakhus	Steven	Eric	Home	19981 See Gull Rd	Brainerd	MN	56401	(218) 828-9215	Steven@Aakhus.com

## **#3 – Format User Fields into the Grid & Make them Updateable in the Grid View**

You can add in the user field data as columns into your grid via [formatting](#) for reporting purposes. The columns will be renamed to whatever you've named them as in your database, for example in my database I renamed User001 to High School Graduation Date.

You'll begin this process by navigating to the list you want to build the report in (*in my example it was the Contacts list*), click on the **Format** drop-down button, and select **Columns**.

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The screenshot shows the TrailBlazer application interface. On the left is the 'Application Menu' with a tree view containing 'Dashboard', 'Calendar/Tasks', 'Canvassing', 'Contact', 'Addresses', 'Households', 'Contact Relationships', 'Contributions/Pledges', 'Product Sales', 'Logs', 'Communications', 'Financial', and 'System Manager'. A red arrow points to 'Contacts' in the 'Contact' sub-menu.

The main window displays the 'Contacts' view with various tabs: 'General', 'Address', 'Household', 'Attribute', 'Canvass', 'Relation', 'Contribute', 'Pledge', 'Event', 'Sales', 'Log', 'Admin', and 'SQL'. Below these are sub-tabs for 'Name', 'Phone', 'E-Mail', 'Email Links', 'Profile', 'Work', 'Demographics', 'User, Text', 'User, Dates', 'User, Decimal', and 'Other'. The 'User, Text' sub-tab is active, showing fields like 'High School Graduation Year', 'Religion', 'Church Affiliation', 'Ethnicity', 'Native Language', 'Business P.O.C.', '1st Child Name', '2nd Child Name', 'Ed. Degree', 'High School Attended', 'User Field 11', and 'User Field 12'.

At the bottom, a data grid shows a list of contacts. A red arrow points to the 'Format' dropdown menu, which is open to the '<System Format>' menu. The 'Columns...' option is highlighted with a red box. A tooltip over the 'Columns...' option reads: 'Add or remove columns, apply formatting, or specify column attributes.'

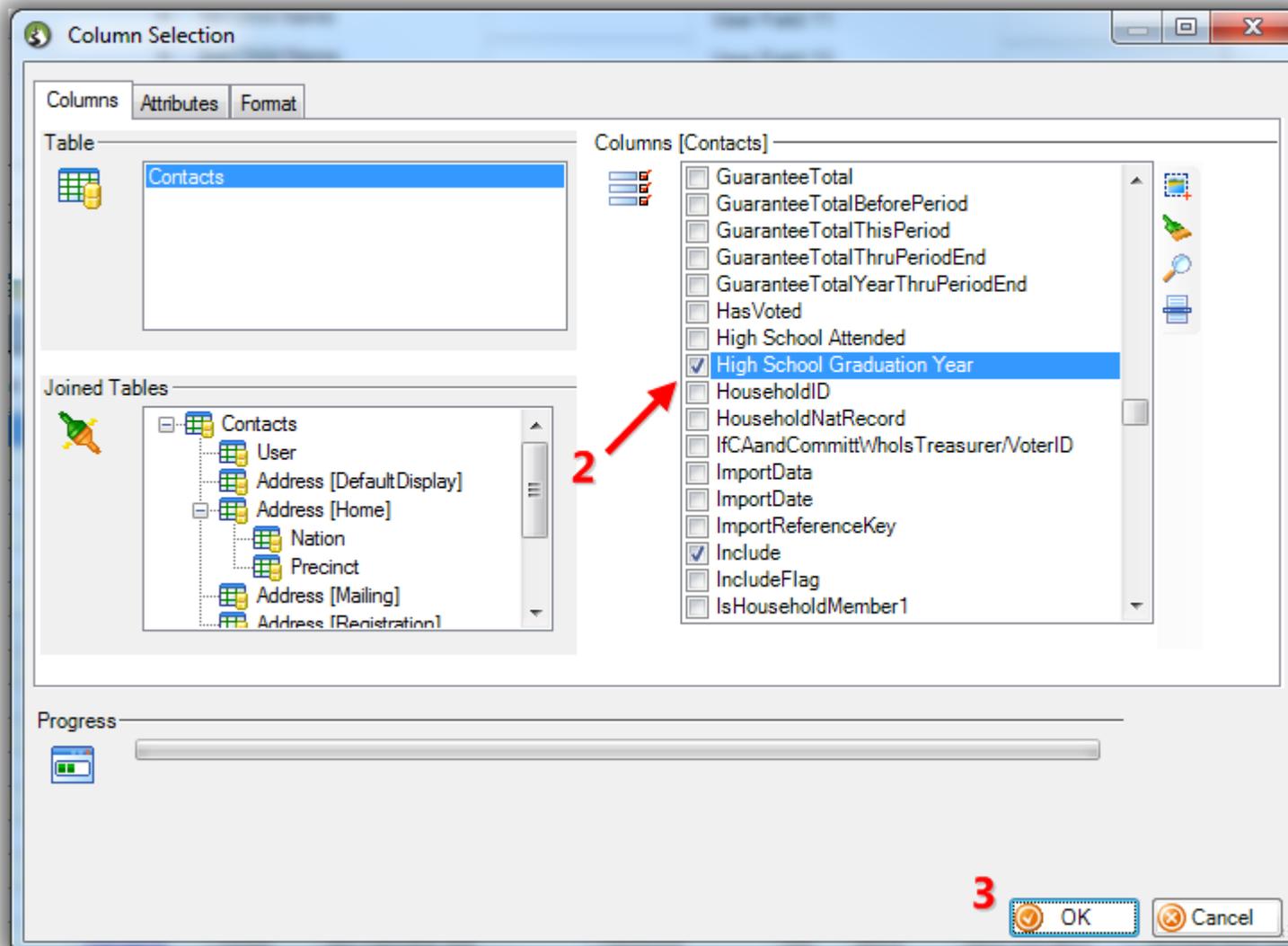
Incl	ID	Last Name	First Name	Address	City	State	Zip Code	Home Phone
<input checked="" type="checkbox"/>	2	Aagard	Martha					(612) 920-921
<input checked="" type="checkbox"/>	3	Aakhus	Ariel	1709 8th St S	Moorhead	MN	56560	(218) 825-921
<input checked="" type="checkbox"/>	4	Aakhus	Cindy	19981 See Gull Rd	Brainerd	MN	56401	(218) 828-921
<input checked="" type="checkbox"/>	5	Aakhus	Steven	19981 See Gull Rd	Brainerd	MN	56401	(218) 828-921
<input checked="" type="checkbox"/>	6	Aamot	Barbara	13451 Mcginty Rd E	Minnetonka	MN	55305	(952) 933-842
<input checked="" type="checkbox"/>	7	Aanenson	Pamela	Home 3896 White Bear Ave	White Bear Lake	MN	55110	(651) 426-961
<input checked="" type="checkbox"/>	8	Aanenson	Leland	Home 59331 155th St	Rose Creek	MN	55970	(507) 434-822
<input checked="" type="checkbox"/>	9	Abbott	Gina	Home 5533 Concord Ave	Edina	MN	55424	(952) 929-921

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Select the user fields you want to add into your format by selecting them from the list of columns (*they'll be renamed to whatever you named them to in section No1*) and click **[OK]**. *In my example I selected a single user field which was the High School Graduation Year.*

## 1. Locate the user fields in the list of column selection list that you want to add into your report.



## How to Rename User Fields, Query by Them, Add Them to the Grid as Columns, and Utilizing Them as Merge Fields in Letter & E-Mail Templates

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The column(s) will populate on the far right of the grid.

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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

Name Phone E-Mail Email Links Profile Work Demographics User, Text User, Dates User, Decimal Other

High School Graduation Year: /n Native Language: Ed. Degree: Religion: Business P.O.C.: High School Attended: Church Affiliation: 1st Child Name: User Field 11: Ethnicity: 2nd Child Name: User Field 12:

**The user field column(s) you select will populate on the far right of the grid.**

Edit Include Exclude Sort Format Export Print Detail Summary Pivot

Contacts [ 9246 records found ]

Incl	ID	Last Name	First Name	MI	Address Type	Address	State	Zip Code	Home Phone	Email	High School Graduation Year
<input checked="" type="checkbox"/>	2	Aagard	Martha	R	Home	4629 York Ave S	Minneapolis	MN 55410	(612) 920-9217	Martha@Aagard.com	1966
<input checked="" type="checkbox"/>	3	Aakhus	Ariel	Marie	Home	1709 8th St S	Moorhead	MN 56560	(218) 825-9215	Ariel@Aakhusxxx.com	2007
<input checked="" type="checkbox"/>	4	Aakhus	Cindy	Lee	Home	19981 See Gull Rd	Brainerd	MN 56401	(218) 828-9215		1962
<input checked="" type="checkbox"/>	5	Aakhus	Steven	Eric	Home	19981 See Gull Rd	Brainerd	MN 56401	(218) 828-9215	Steven@Aakhus.com	1962
<input checked="" type="checkbox"/>	6	Aamot	Barbara	A	Home	13451 Mcginty Rd E	Minnetonka	MN 55305	(952) 933-8423	Barbara@Aamot.com	1935
<input checked="" type="checkbox"/>	7	Aanenson	Pamela	Marie	Home	3896 White Bear Ave	White Bear Lake	MN 55110	(651) 426-9611	Pamela@Aanenson.com	1968
<input checked="" type="checkbox"/>	8	Aanonson	Leland	Eugene	Home	59331 155th St	Rose Creek	MN 55970	(507) 434-8229	Leland@Aanonson.com	1953
<input checked="" type="checkbox"/>	9	Abbott	Gina	Marie	Home	5533 Concord Ave	Edina	MN 55424	(952) 929-9217		1963
<input checked="" type="checkbox"/>	10	Abbott	Steven	William	Home	5533 Concord Ave	Edina	MN 55424	(952) 929-9217		1970
<input checked="" type="checkbox"/>	11	Abdi	Ali	Hassan	Home	206 62nd St W	Minneapolis	MN 55419	(612) 432-8920	Ali@Abdi.com	1982
<input checked="" type="checkbox"/>	12	Abdi	Halimo	Mohamed	Home	2904 18th Ave S	Minneapolis	MN 55407	(612) 432-8824		1974
<input checked="" type="checkbox"/>	13	Abdi	Nimo	Mohamed	Home	1201 Brook Ave SE	Minneapolis	MN 55414	(612) 532-8525		1987
<input checked="" type="checkbox"/>	14	Abdulali	Quaid		Home	3408 Stevens Ave S	Minneapolis	MN 55408	(612) 821-9310		1975
<input checked="" type="checkbox"/>	14178	Abdullahi	Rachel		Home	2437 15th St NW	Washington	DC 20009			2007
<input checked="" type="checkbox"/>	15	Abdurahman	Ayan	Adan	Home	811 28th Ave S	Minneapolis	MN 55454	(651) 645-7234		1965
<input checked="" type="checkbox"/>	16	Abel	Tasha	Margaret	Home	303 Fairview Ave	Fairmont	MN 56031	(502) 235-8827	Tasha@Abel.com	1975
<input checked="" type="checkbox"/>	13008	Abell	James	I	Home	2040 Holly Swamp Rd	Pocomoke City	MD 21851			2007
<input checked="" type="checkbox"/>	13600	Abernathy	Betty	J	Home	2411 Fairway Oaks Ct	Hampstead	MD 21074			2007
<input checked="" type="checkbox"/>	17	Abouaish	Yasmine	Y	Home	1432 Brookshire Ct	New Brighton	MN 55112	(763) 742-7139	Yasmine@Abouaish.com	1989
<input checked="" type="checkbox"/>	19	Abrahamian	Daniel	Paul	Home	6012 Beard Ave S	Edina	MN 55410	(952) 929-9918	Daniel@Abrahamian.com	1990
<input checked="" type="checkbox"/>	20	Abrahamian	David		Home	6012 Beard Ave S	Edina	MN 55410	(952) 929-9918	David@Abrahamian.com	1962
<input checked="" type="checkbox"/>	21	Abrahamian	Kelli	Ann	Home	6012 Beard Ave S	Edina	MN 55410	(952) 929-9918	Kelli@Abrahamian.com	1962
<input checked="" type="checkbox"/>	13252	Abrahams	Audrey	C	Home	11 N Main St	Port Deposit	MD 21904			2007
<input checked="" type="checkbox"/>	22	Abrahamson	Roger	Mark	Home	5147 37th Ave S	Minneapolis	MN 55417	(612) 823-9213		1952

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Repeat these steps until the user fields that you want to add are added, and the columns you don't need in your report have been removed. *My finished example is below which includes all of the user fields I've renamed in my database in a single report.*

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## Example custom user field report.

Search Reset New [Icons] File Edit Include Other Contacts

Favorites General Address Household Attribute Canvass Relation Contribute Pledge Event Sales Log Admin SQL

Name Phone E-Mail Email Links Profile Work Demographics User, Text User, Dates User, Decimal Other

High School Graduation Year: /n Native Language: Ed. Degree: [ ] [ ] [ ]  
 Religion: Business P.O.C.: High School Attended: [ ] [ ] [ ]  
 Church Affiliation: 1st Child Name: User Field 11: [ ] [ ] [ ]  
 Ethnicity: 2nd Child Name: User Field 12: [ ] [ ] [ ]

## User defined fields after they've been added to the grid.

Edit Include Exclude Sort Format Export Print Detail Summary Pivot

Contacts [ 9246 records found ]

Incl	Last Name	First Name	City	State	Religion	Church Affiliation	Ethnicity	Native Language	Ed. Degree	High School Graduation Year	High School Attended	1st Child Name	2nd Child Name	Business P. O. C.
<input checked="" type="checkbox"/>	Aaqard	Martha	Minneapolis	MN	Christian		Caucasian	English	Masters Degree	1958	Fridley High School			Bobby J
<input checked="" type="checkbox"/>	Aakhus	Ariel	Moorhead	MN				English		2007	Chaska High School			
<input checked="" type="checkbox"/>	Aakhus	Cindy	Brainerd	MN	Baptist	Elim Baptist Church	Asian			1958	West Lutheran High School	John		
<input checked="" type="checkbox"/>	Aakhus	Steven	Brainerd	MN			Chinese	English		1962	Princeton High School			
<input checked="" type="checkbox"/>	Aamot	Barbara	Minnetonka	MN	Christian	Calvary Lutheran Church	Asian	English		1935	Princeton High School	Bob	Sarah	
<input checked="" type="checkbox"/>	Aanenson	Pamela	White Bear Lake	MN	Christian		African American			1958	Chaska High School			
<input checked="" type="checkbox"/>	Aanonson	Leland	Rose Creek	MN	Amish		Caucasian	English	Masters Degree	1953	Princeton High School			Terresa
<input checked="" type="checkbox"/>	Abbott	Gina	Edina	MN	Islam	Emmaus Lutheran Church				1963				
<input checked="" type="checkbox"/>	Abbott	Steven	Edina	MN			Caucasian	English		1970				
<input checked="" type="checkbox"/>	Abdi	Ali	Minneapolis	MN			African American			1982		Kim		
<input checked="" type="checkbox"/>	Abdi	Halimo	Minneapolis	MN			Caucasian	English		1958	Pease Academy			
<input checked="" type="checkbox"/>	Abdi	Nimo	Minneapolis	MN	Christian	Calvary Lutheran Church		English		1987				
<input checked="" type="checkbox"/>	Abdulali	Quaid	Minneapolis	MN	Slavic neopaganism			Chinese	G.E.D.	1975				
<input checked="" type="checkbox"/>	Abdullahi	Rachel	Washington	DC		Calvary Lutheran Church	African American	English		2007				
<input checked="" type="checkbox"/>	Abdurahman	Avan	Minneapolis	MN	Gasin faith (Korean)		Caucasian	English		1965	Thistledeu School			
<input checked="" type="checkbox"/>	Abel	Tasha	Fairmont	MN	Amish		Hindi		Masters Degree	1975	St. Peter High School			
<input checked="" type="checkbox"/>	Abell	James	Pocomoke City	MD			African American	English	Masters Degree	2007				
<input checked="" type="checkbox"/>	Abernathy	Betty	Hampstead	MD			Caucasian			2007	Paladin Career and Technic...	Franky	Tim	Dr. Earl
<input checked="" type="checkbox"/>	Abouaish	Yasmine	New Brighton	MN		Emmaus Lutheran Church	African American	English		1989				
<input checked="" type="checkbox"/>	Abrahamian	Daniel	Edina	MN		Emmaus Lutheran Church		English	Masters Degree	1990				
<input checked="" type="checkbox"/>	Abrahamian	David	Edina	MN		Calvary Lutheran Church		English		1962	Our Lady of Lourdes			
<input checked="" type="checkbox"/>	Abrahamian	Kelli	Edina	MN			Caucasian	English	High School Diploma	1962	Truman High School			
<input checked="" type="checkbox"/>	Abrahams	Audrey	Port Deposit	MD	Islam	Calvary Lutheran Church	Asian	English	Doctorate	2007				
<input checked="" type="checkbox"/>	Abrahamson	Roger	Minneapolis	MN	Gasin faith (Korean)		Caucasian	English	Masters Degree	1952	Truman High School			
<input checked="" type="checkbox"/>	Abukar	Halima	Minneapolis	MN	Mormon		Asian			1958	West Lutheran High School			

9,246

## How to Rename User Fields, Query by Them, Add Them to the Grid as Columns, and Utilizing Them as Merge Fields in Letter & E-Mail Templates

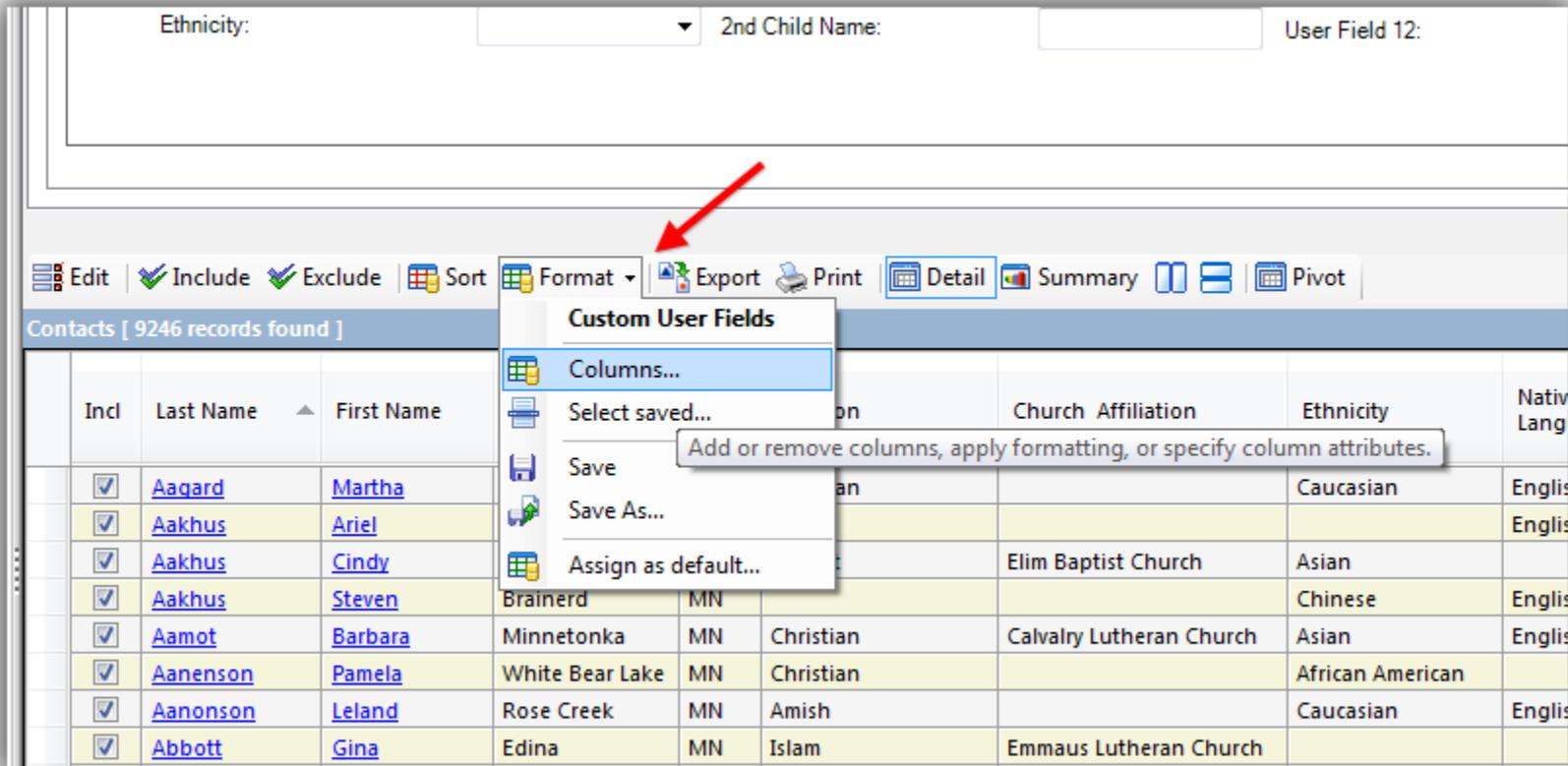
---

You can [save these formats](#) for future use and also assign it as a default if you want.

Another useful thing you can do is make these fields '**Updatable in the Grid View**' by going into the **Format** tab of the Column Selection screen and checking the corresponding boxes. *Shown in the screenshots below.*

Img 1 of 3 – Open Up the Formatting Screen

## How to Rename User Fields, Query by Them, Add Them to the Grid as Columns, and Utilizing Them as Merge Fields in Letter & E-Mail Templates



The screenshot shows the TrailBlazer interface with a grid of contact records. The 'Format' tab is selected in the top navigation bar, and a red arrow points to it. The 'Custom User Fields' menu is open, showing options like 'Columns...', 'Select saved...', 'Save', 'Save As...', and 'Assign as default...'. The background grid shows columns for 'Last Name', 'First Name', 'Church Affiliation', 'Ethnicity', and 'Native Language'.

Incl	Last Name	First Name	Church Affiliation	Ethnicity	Native Language
<input checked="" type="checkbox"/>	<a href="#">Aaqard</a>	<a href="#">Martha</a>			
<input checked="" type="checkbox"/>	<a href="#">Aakhus</a>	<a href="#">Ariel</a>			
<input checked="" type="checkbox"/>	<a href="#">Aakhus</a>	<a href="#">Cindy</a>			
<input checked="" type="checkbox"/>	<a href="#">Aakhus</a>	<a href="#">Steven</a>	Brainerd	MN	Chinese
<input checked="" type="checkbox"/>	<a href="#">Aamot</a>	<a href="#">Barbara</a>	Minnetonka	MN	Christian
<input checked="" type="checkbox"/>	<a href="#">Aanenson</a>	<a href="#">Pamela</a>	White Bear Lake	MN	Christian
<input checked="" type="checkbox"/>	<a href="#">Aanonson</a>	<a href="#">Leland</a>	Rose Creek	MN	Amish
<input checked="" type="checkbox"/>	<a href="#">Abbott</a>	<a href="#">Gina</a>	Edina	MN	Islam

Img 2 of 3 – Navigate to the Format Tab and Check the Boxes for Updateable

# How to Rename User Fields, Query by Them, Add Them to the Grid as Columns, and Utilizing Them as Merge Fields in Letter & E-Mail Templates

Column Selection

Columns | Attributes | **Format** 1

Format

Column	Heading	Filter	Visible	Width	Frozen	Updatable	Type	Subtype
Phone_Home	Home Phone		<input type="checkbox"/>	85	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Text	Phone Num
Phone_Bus	Bus Phone		<input type="checkbox"/>	85	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Text	Phone Num
Phone_Cell	Cell Phone		<input type="checkbox"/>	85	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Text	Phone Num
EmailAddress	Email		<input type="checkbox"/>	144	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Text	
Religion	Religion		<input checked="" type="checkbox"/>	121	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Text	
Church Affiliation	Church Affiliati...		<input checked="" type="checkbox"/>	148	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Text	
Ethnicity	Ethnicity		<input checked="" type="checkbox"/>	110	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Text	
Native Language	Native Language		<input checked="" type="checkbox"/>	79	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Text	
Ed. Degree	Ed. Degree		<input checked="" type="checkbox"/>	132	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Text	
High School Graduation Year	High School G...		<input checked="" type="checkbox"/>	89	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Text	
High School Attended	High School A...		<input checked="" type="checkbox"/>	156	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Text	
1st Child Name	1st Child Name		<input checked="" type="checkbox"/>	69	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Text	
2nd Child Name	2nd Child Name		<input checked="" type="checkbox"/>	63	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Text	
Business P.O.C.	Business P. O. C.		<input checked="" type="checkbox"/>	68	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Text	
Employer	Employer/Comp...		<input type="checkbox"/>	160	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Text	

Progress

OK 3 Cancel

## How to Rename User Fields, Query by Them, Add Them to the Grid as Columns, and Utilizing Them as Merge Fields in Letter & E-Mail Templates

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Img 3 of 3 – Click the [Edit] Button and Modify the Data in the Grid View

# How to Rename User Fields, Query by Them, Add Them to the Grid as Columns, and Utilizing Them as Merge Fields in Letter & E-Mail Templates

Search Reset New [Icons] File Edit Include Other Contacts

Favorites General Address Household Attribute Canvass Relation Contribute Pledge Event Sales Log Admin SQL

Name Phone E-Mail Email Links Profile Work Demographics User, Text User, Dates User, Decimal Other

High School Graduation Year: /n Native Language: Ed. Degree: Religion: Business P.O.C.: High School Attended: Church Affiliation: 1st Child Name: User Field 11: Ethnicity: 2nd Child Name: User Field 12:

**The cells turn green allowing you to update them in the grid view.**

Edit Include Exclude Sort Format Export Print Detail Summary Pivot

Contacts [ 9246 records found ]

Allow Updates

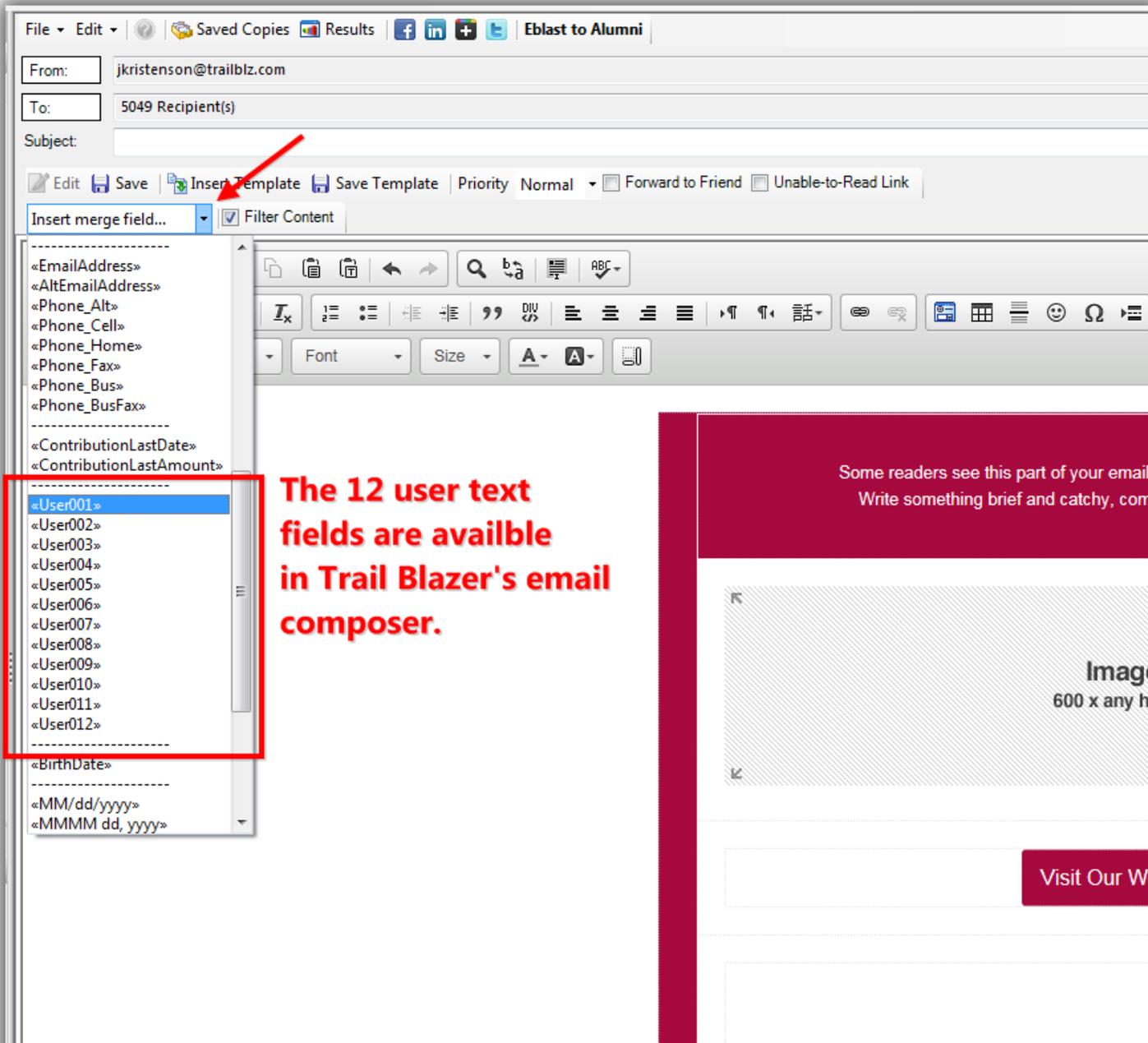
Incl	Last Name	First Name	City	State	Religion	Church Affiliation	Ethnicity	Native Language	Ed. Degree	High School Graduation Year	High School A
<input checked="" type="checkbox"/>	Aagard	Martha	Minneapolis	MN	Christian		Caucasian	English	Masters Degree	1958	Fridley High Sch
<input checked="" type="checkbox"/>	Aakhus	Ariel	Moorhead	MN				English		2007	Chaska High Sch
<input checked="" type="checkbox"/>	Aakhus	Cindy	Brainerd	MN	Baptist	Elim Baptist Church	Asian			1958	West Lutheran H
<input checked="" type="checkbox"/>	Aakhus	Steven	Brainerd	MN			Chinese	English		1962	Princeton High S
<input checked="" type="checkbox"/>	Aamot	Barbara	Minnetonka	MN	Christian	Calvary Lutheran Church	Asian	English		1935	Princeton High S
<input checked="" type="checkbox"/>	Aanenson	Pamela	White Bear Lake	MN	Christian		African American			1958	Chaska High Sch
<input checked="" type="checkbox"/>	Aanonson	Leland	Rose Creek	MN	Amish		Caucasian	English	Masters Degree	1953	Princeton High S
<input checked="" type="checkbox"/>	Abbott	Gina	Edina	MN	Islam	Emmaus Lutheran Church				1963	
<input checked="" type="checkbox"/>	Abbott	Steven	Edina	MN			Caucasian	English		1970	
<input checked="" type="checkbox"/>	Abdi	Ali	Minneapolis	MN			African American			1982	
<input checked="" type="checkbox"/>	Abdi	Halimo	Minneapolis	MN			Caucasian	English		1958	Pease Academy
<input checked="" type="checkbox"/>	Abdi	Nimo	Minneapolis	MN	Christian	Calvary Lutheran Church		English		1987	
<input checked="" type="checkbox"/>	Abdulali	Quaid	Minneapolis	MN	Slavic neopaganism			Chinese	G.E.D.	1975	
<input checked="" type="checkbox"/>	Abdullahi	Rachel	Washington	DC		Calvary Lutheran Church	African American	English		2007	
<input checked="" type="checkbox"/>	Abdurahman	Avan	Minneapolis	MN	Gasin faith (Korean)		Caucasian	English		1965	Thistledeu Scho
<input checked="" type="checkbox"/>	Abel	Tasha	Fairmont	MN	Amish		Hindi		Masters Degree	1975	St. Peter High Sc
<input checked="" type="checkbox"/>	Abell	James	Pocomoke City	MD			African American	English	Masters Degree	2007	
<input checked="" type="checkbox"/>	Abernathy	Betty	Hampstead	MD			Caucasian			2007	Paladin Career a
<input checked="" type="checkbox"/>	Abouaish	Yasmine	New Brighton	MN		Emmaus Lutheran Church	African American	English		1989	
<input checked="" type="checkbox"/>	Abrahamian	Daniel	Edina	MN		Emmaus Lutheran Church		English	Masters Degree	1990	
<input checked="" type="checkbox"/>	Abrahamian	David	Edina	MN		Calvary Lutheran Church		English		1962	Our Lady of Lou

## **#4 – Utilize User Fields as Merge Fields in your Letter & E-Mail Templates**

User fields are available as merge fields in both the email system and the mail-merge system. **In the email composer the \*TEXT\* user fields are the only ones available, in a physical letter \*ALL\* merge fields will be available.**

To utilize them in an email, create either a [template](#) or a [mass email campaign](#), and the user fields will display in the merge field drop-down list. *My example campaign is below.*

## How to Rename User Fields, Query by Them, Add Them to the Grid as Columns, and Utilizing Them as Merge Fields in Letter & E-Mail Templates



File Edit Saved Copies Results Eblast to Alumni

From: jkristenson@trailblz.com

To: 5049 Recipient(s)

Subject:

Edit Save Insert merge field... Save Template Priority Normal Forward to Friend Unable-to-Read Link

Filter Content

«EmailAddress»  
«AltEmailAddress»  
«Phone\_Alt»  
«Phone\_Cell»  
«Phone\_Home»  
«Phone\_Fax»  
«Phone\_Bus»  
«Phone\_BusFax»  
«ContributionLastDate»  
«ContributionLastAmount»  
**«User001»**  
«User002»  
«User003»  
«User004»  
«User005»  
«User006»  
«User007»  
«User008»  
«User009»  
«User010»  
«User011»  
«User012»  
«BirthDate»  
«MM/dd/yyyy»  
«MMMM dd, yyyy»

**The 12 user text fields are available in Trail Blazer's email composer.**

Some readers see this part of your email as a separate message. Write something brief and catchy, complete with a subject line.

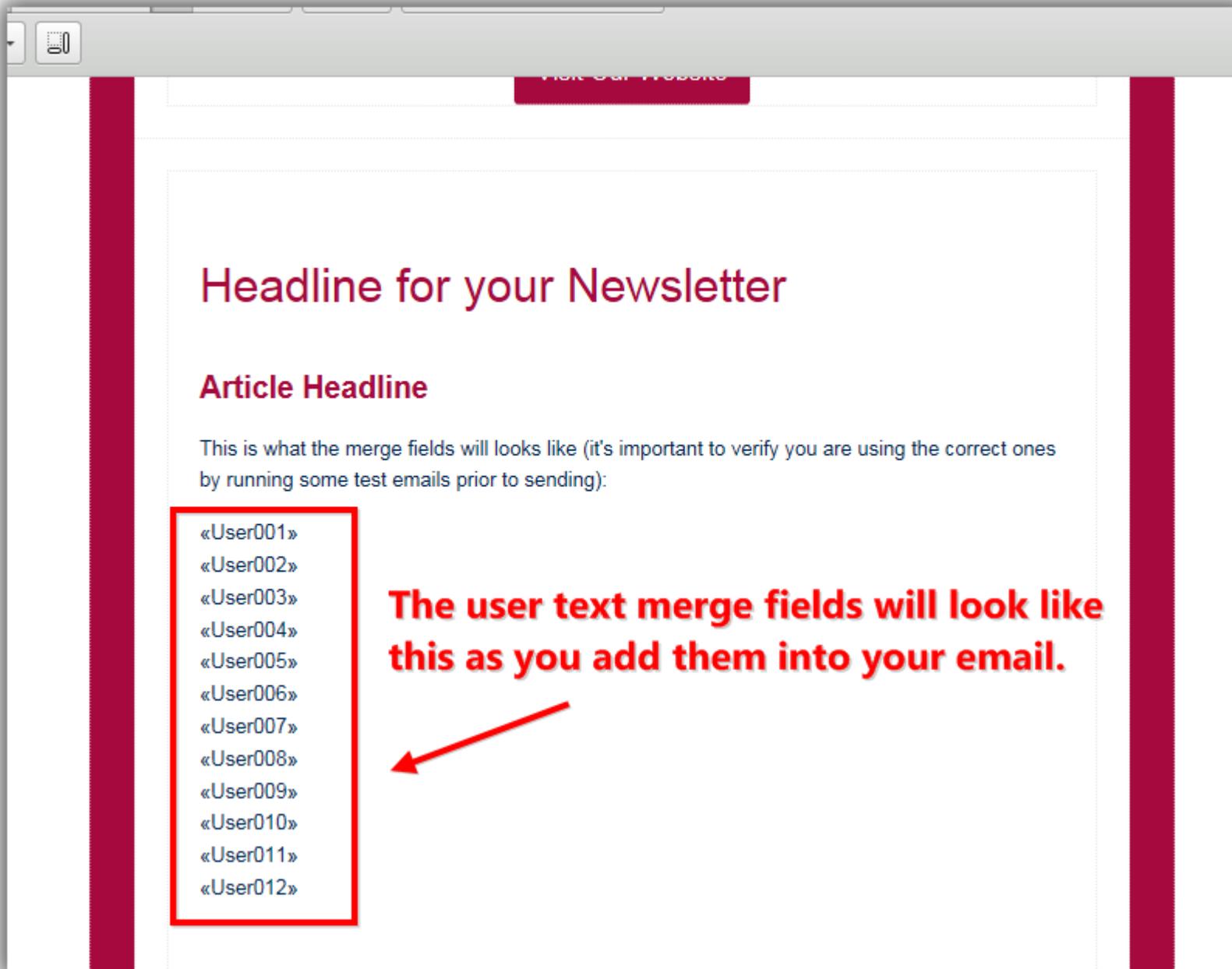
Image  
600 x any height

Visit Our Website

## How to Rename User Fields, Query by Them, Add Them to the Grid as Columns, and Utilizing Them as Merge Fields in Letter & E-Mail Templates

---

Here's what the user text merge fields will look like as they're added into your email message:



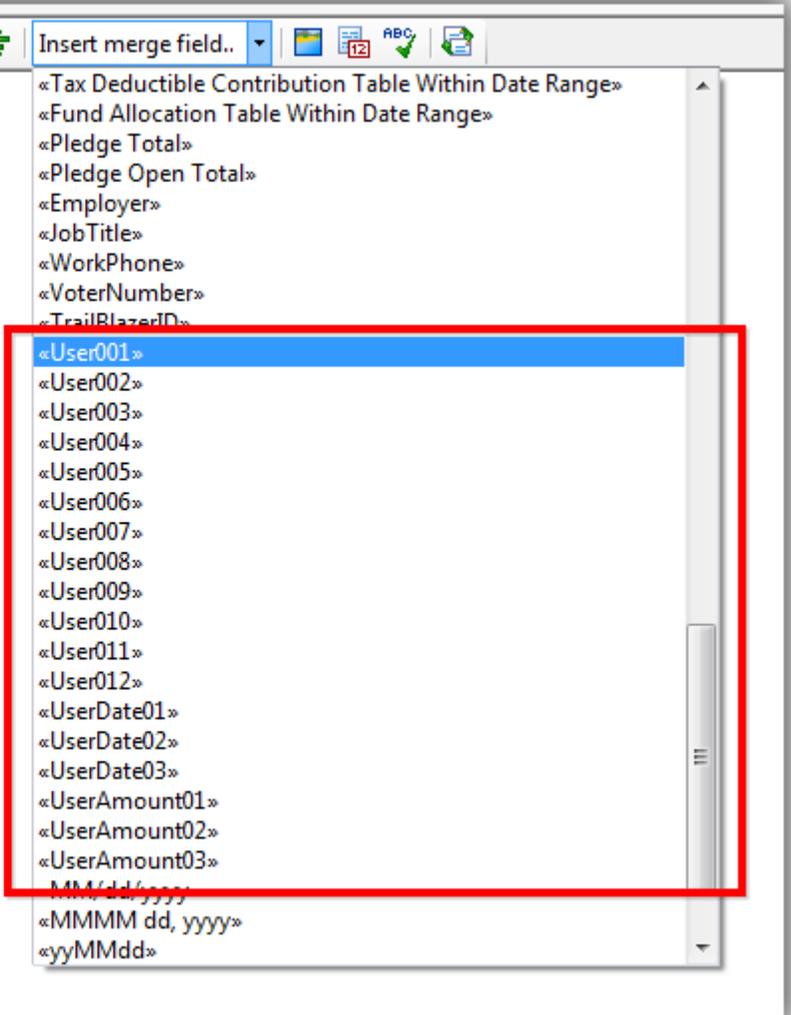
## How to Rename User Fields, Query by Them, Add Them to the Grid as Columns, and Utilizing Them as Merge Fields in Letter & E-Mail Templates

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When you create [physical letter templates](#) for your snail-mail efforts you'll be able to utilize **\*ALL\*** of the user fields (text, decimal, and date fields), the image below provides an example of where you'll insert them from:

## How to Rename User Fields, Query by Them, Add Them to the Grid as Columns, and Utilizing Them as Merge Fields in Letter & E-Mail Templates

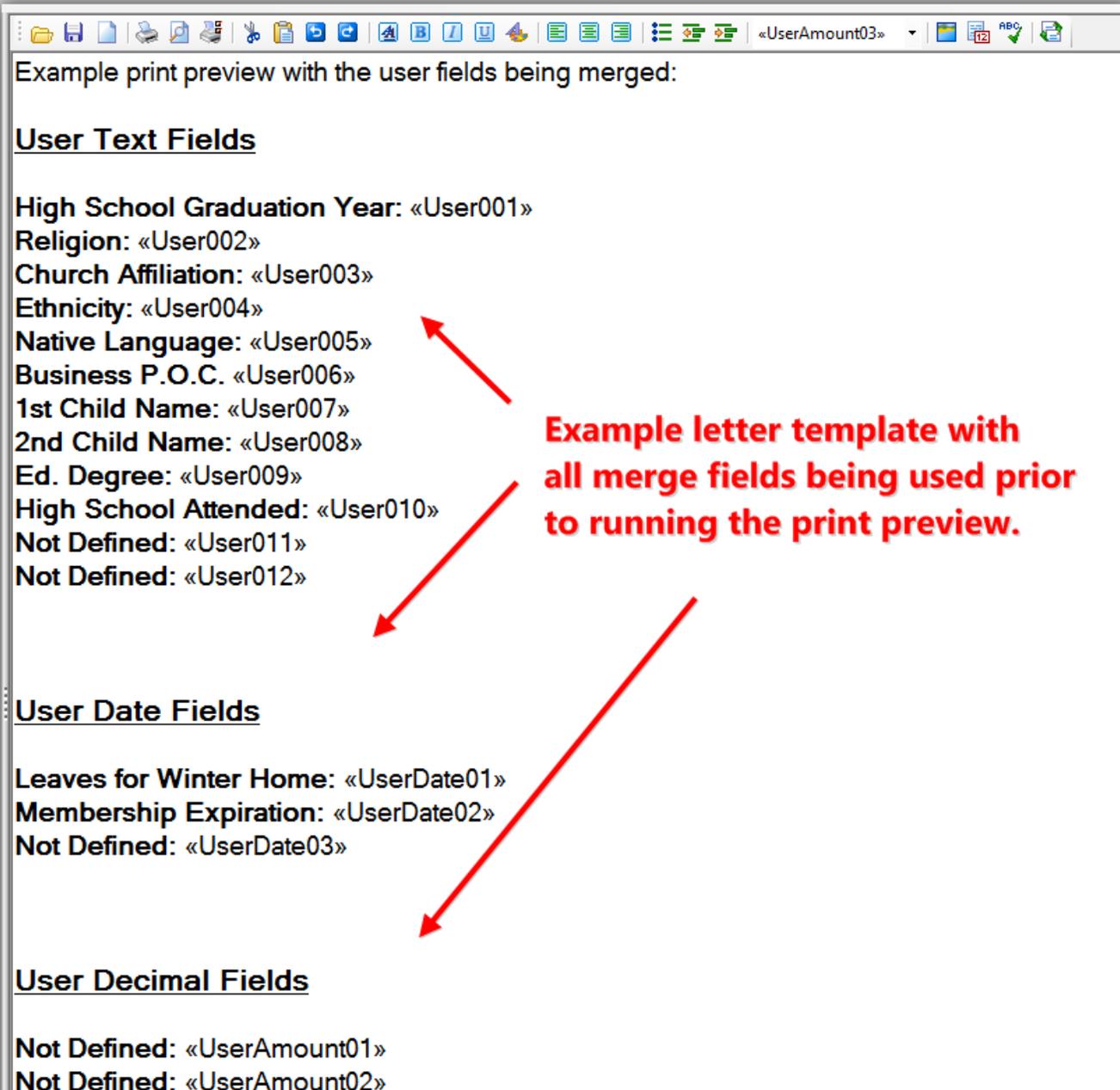
**When you create a physical letter template ALL of the user fields will be available for use.**



## How to Rename User Fields, Query by Them, Add Them to the Grid as Columns, and Utilizing Them as Merge Fields in Letter & E-Mail Templates

---

Here's my *example* print preview using all of the user field merge-fields in the system (prior to the print preview):



Example print preview with the user fields being merged:

**User Text Fields**

High School Graduation Year: «User001»  
Religion: «User002»  
Church Affiliation: «User003»  
Ethnicity: «User004»  
Native Language: «User005»  
Business P.O.C. «User006»  
1st Child Name: «User007»  
2nd Child Name: «User008»  
Ed. Degree: «User009»  
High School Attended: «User010»  
Not Defined: «User011»  
Not Defined: «User012»

**User Date Fields**

Leaves for Winter Home: «UserDate01»  
Membership Expiration: «UserDate02»  
Not Defined: «UserDate03»

**User Decimal Fields**

Not Defined: «UserAmount01»  
Not Defined: «UserAmount02»

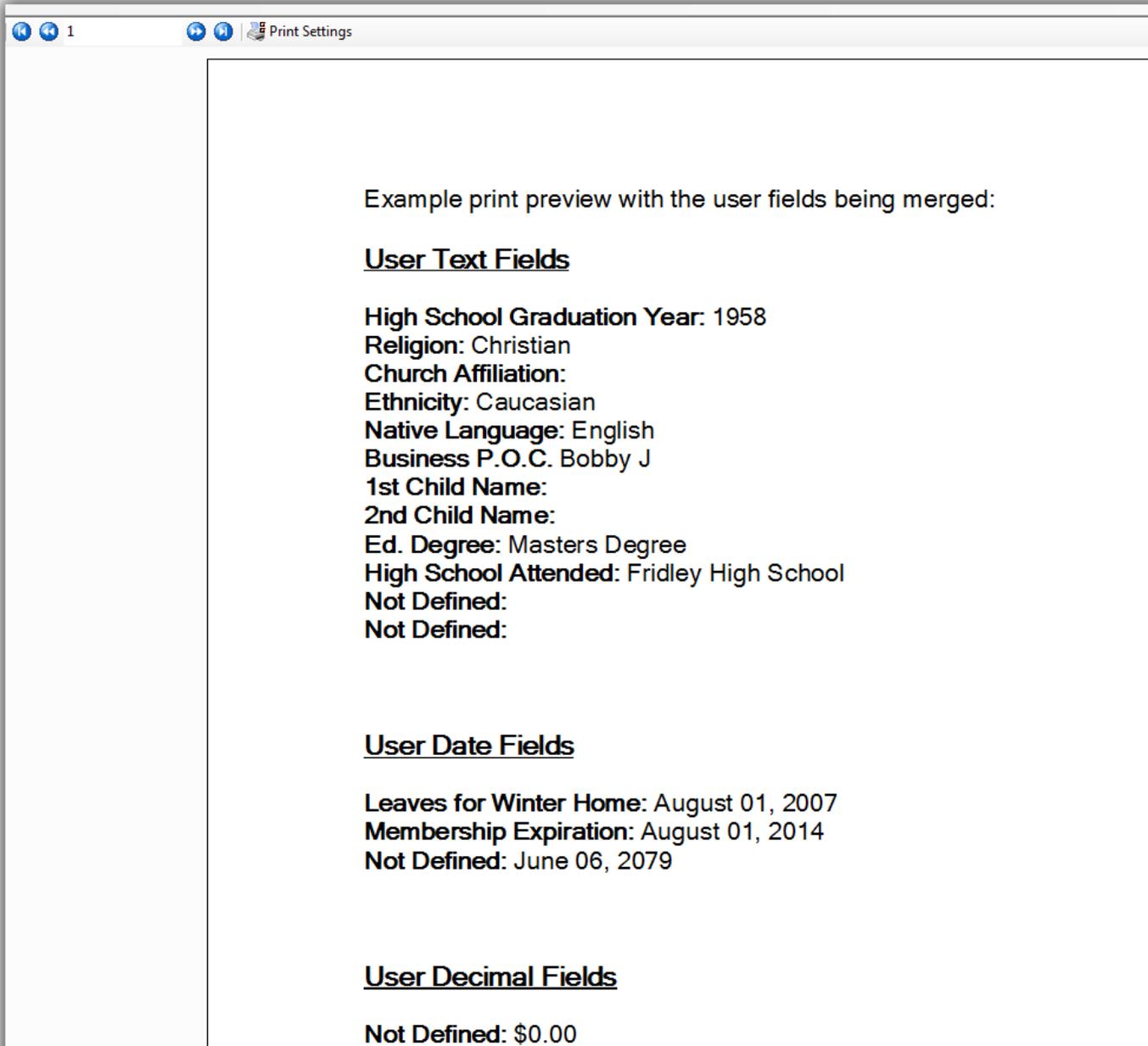
**Example letter template with all merge fields being used prior to running the print preview.**

## How to Rename User Fields, Query by Them, Add Them to the Grid as Columns, and Utilizing Them as Merge Fields in Letter & E-Mail Templates

---

And here's what my *example* looks like after the print preview is generated:

## Example print preview with all available merge fields.



1 Print Settings

Example print preview with the user fields being merged:

**User Text Fields**

High School Graduation Year: 1958  
Religion: Christian  
Church Affiliation:  
Ethnicity: Caucasian  
Native Language: English  
Business P.O.C. Bobby J  
1st Child Name:  
2nd Child Name:  
Ed. Degree: Masters Degree  
High School Attended: Fridley High School  
Not Defined:  
Not Defined:

**User Date Fields**

Leaves for Winter Home: August 01, 2007  
Membership Expiration: August 01, 2014  
Not Defined: June 06, 2079

**User Decimal Fields**

Not Defined: \$0.00

## How to Rename User Fields, Query by Them, Add Them to the Grid as Columns, and Utilizing Them as Merge Fields in Letter & E-Mail Templates

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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:** [Mass Update – Changing or Clearing Fields](#)

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

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

**Article:** [\(Mail-Merge\) – How to Write a Letter, and Save it as a Template](#)

**Article:** [Articles on Importing](#)

**Article:** [Mail Merge – Write a Letter](#)

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

**Video:** [Eblasts Create and Send Eblasts – Includes Image Management](#)

**Video:** [Donation Auto Responders with Merge Fields](#)

**Video:** [Write Letter – Edit Letter after Mail Merge](#)

**Video:** [Videos on Importing](#)

## Trail Blazer Live Support

## How to Rename User Fields, Query by Them, Add Them to the Grid as Columns, and Utilizing Them as Merge Fields in Letter & E-Mail Templates

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📞 **Phone:** 1-866-909-8700

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