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### **Overview**

This article walks through the steps to **import voters**, **vote history**, and **add elections** from the **state voter database** (*we have on file*). *This KB is just for political campaign* customers and would not work in the nonprofit product.

Note: As of the time this article was written we have these 19 states on file (from A to Z):

- Alaska
- Arkansas
- Colorado
- Florida
- Idaho
- Indiana
- Louisiana



- Michigan
- Minnesota
- Missouri
- New Jersey
- New York
- North Carolina
- Ohio
- Oklahoma
- Rhode Island
- Vermont
- Washington
- Washington D.C.

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

#### <u>Outline</u>

- #1 Import 'Voters' from the State Voter Database into your Campaign's Database
- **#2** Import 'Elections' from the State Voter Database into your Campaign's Database
- #3 Refreshing/Importing 'Voter History' from the State Voter Database into your Campaign's Database
- #4 Related Resources



## <u>#1 – Import 'Voters' from the State Voter Database into your Campaign's Database</u>

If you're in a state where we have the voter roll on file you'll see a link under the **Application Menu** in the upper-left that says something like 'Your State' Voter List. In my example is said **Minnesota Voter List**:





Click on that link and then click **[OK]** to login. *No credentials are required they're already hard coded into the software.* 







Run a <u>search query</u> for the list of voters you want to import **from the state database** into your local db. *In my example I searched for everyone who* voted in the last general **election** (2014), and lived in a specific **precinct** (Golden Valley P-1A) which produced **1,184** voter records (shown below).



#### Build and run your search query for the voters you want to import from the state database into your campaign's database.

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**Tip:** You can **'hand-import'** voters one-by-one if you click on the **[Import]** button next to their name in the grid. This is not as common as running a mass import but can come in handy, here's an *example*:



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Tip: You can import records \*one-at-a-time\* by clicking on the [Import] button next to voter's name.

KNOWLEDGE BASE www.trailblz.com/kb



To begin the mass import operation click on File > Import from State Database (in this case the Minnesota State Voter Database):







You have the *option* to import **attributes** which could be a wide range of things that your state board of elections might collect during an election on their voters i.e. race, ethnicity, or more typically the source of the data. Check the box to import attributes if you want to bring them in, and then click **[OK]**. *In my example I select to import attributes along with all the other voter data*.



\*If you want to import attributes that are tied to the voter's record check this box.

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	Please press OK to proceed
	OK OCancel

Typically this will include a 'source' attribute for when the data was initial uploaded into our state DB.



Depending on the size of the list you're importing the operation could take anywhere from a few minutes to a few hours. In my case it was only about 1k voters and took about 3 minutes. Trail Blazer will provide a load animation during the process as shown below.

## Load status while the import is taking place.

# Trail Blazer will merge any existing records together if they're an exact match.

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Once the process is complete you'll get a popup message with the results. The system will **automatically merge** existing records during the import if it's an exact match with the voter record(s) already in your database, click **[OK]** to finish. *In my example out of the 1k+ voters I was importing* **283** *were new.* 



You can now return to your own 'voters' list, and run the same search query to make sure the records were imported/updated correctly.

That completes the steps to mass import voters – continue reading to learn how to bring in new elections and voter history.



### **#2 – Import 'Elections' from the State Voter Database into your Campaign's Database**

Your current list of 'searchable' elections will reside in the **Voters** list under the **Vote History** tab. *My example is below where I had* **12** *elections in my database.* 



#### How to find the current list of elections in your database (if you have any).

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To begin importing new/old elections from the state database navigate to the 'Elections, Voter History List' by following Application Menu > System Manager > Lists > Elections, Voter History



### Navigate to the 'Elections, Voter History' list (requires admin security clearance).

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Select File > Import State Elections



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You'll receive a popup message. Click [OK] to proceed with the selection of which elections to import.



# Click [OK] to proceed with the selection of elections to import.

Check the boxes next to the elections you want to import, and then click **[OK]**. In my example I selected **all** the **general** and **primary** elections.



## No. of elections that are selected.



It usually doesn't take more than a few seconds for the process to finish. You'll receive a popup message with the results, click **[OK]** to continue. *In my example I imported* **12** *elections.* 



# After the operation has finished you'll receive a popup message with the results.



Click **[Search]** in the **Elections, Voter History** list to refresh it and display the new elections you imported. *My example is below where I had 12 more elections for a total of 24.* 



### Click [Search] to refresh the list of elections in your database to view the new ones that have been imported.

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	<b>V</b>	3	General 2004		11/2/2004	2		11/02/2004	42697	176
		4	09/14/2004 Primary		9/14/2004	1		09/14/2004	4262	152
	<b>V</b>	5	General 2003		11/4/2003	2		11/04/2003	2542	179
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These are the new elections that were imported into my database in my \*example.



That completes the steps. The following sections will show how to refresh voter history as well as setting the **voter counts** and **vote percentages** en masse once everything else has been completed.

# <u>#3 – Refreshing/Importing 'Voter History' from the State Voter Database into your</u> <u>Campaign's Database</u>

Navigate to the **Voters** list under the **Application Menu**.





Click **[Search]** to load all the voters in your database OR run a search query for a segment of voters in your database. *In my example I loaded all 72k.* 





# Either load all voter records in your database OR run a search query for a segment of voters.

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Nickname:	Records to Load
Prior Last Name:	Search found 72,538 records. Of these, load:
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72538 records found. Starting load dialog	Waiting for user input
✓ ID ▲ Last Name First Name	3 State Zip Birth Gender
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KNOWLEDGE BASE www.trailblz.com/kb



#### Follow File > Utilities > Import Voter History from State File

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		3	Aaberg	_	Kathrine	Mary	3915 Noble A	ve N		-	Robbinsdale	MN	55422	1/1/1965	F	Hennepin

Current count of voters in your list.



Click [OK] to proceed with the operation. THIS MAY TAKE A LONG TIME (hours) TO RUN IF YOU HAVE MORE THAN 100k+ VOTERS IN YOUR LIST.



You'll get a load animation as the process runs.



## You'll get a load annimation that displays the status of the voter history import/refresh. This process could take a long time if you have over a 100k voters in the list.

Progress	8
Progress	
Importing: 3,000 voters processed, voting history imported for 2,121 voters	
Running Time: 0.00:01:07	
Cancel	

When the operation has finished you'll get a popup message with the results. Click **[OK]** to proceed. In my example about ½ **(47k)** out of the 70k voters I had in my list had their voter history updated.



# You'll get a popup message when the operation has finished, click [OK] to proceed.



That completes the steps.

It's not a *requirement*, but it's a good idea to **set your voter counts** for the elections you imported. To do that return the **Elections**, **Voter History** list, select **File > Set Voter Counts** 







#### Click [OK] to proceed.



Click **[OK]** again you receive a popup notification that the process has completed.





Click [Search] to refresh the list and you'll see the new voter counts for the elections you imported from the state database.



# Click [Search] to refresh the numbers in the grid for 'voter counts' after you update them from the file drop-down menu.

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	<b>V</b>	3	General 2004		11/2/2004	2		11/02/2004	42697	176
	<b>V</b>	<u>4</u>	09/14/2004 Primary		9/14/2004	1		09/14/2004	4284	152
	<b>V</b>	5	General 2003		11/4/2003	2		11/04/2003	2542	179
	<b>V</b>	<u>6</u>	09/09/2003 Primary		9/9/2003	1		09/09/2003	14	142
	<b>V</b>	Z	General 2006		11/7/2006	2		11/07/2006	29674	230
	<b>V</b>	<u>8</u>	Primary 2006		9/12/2006	1		09/12/2006	8254	227
	<b>v</b>	2	General 2010		11/2/2010	2		11/02/2010	28828	442
	<b>V</b>	<u>10</u>	Primary 2010		8/10/2010	1		08/10/2010	8620	486
	V	<u>11</u>	General 2008		11/4/2008	2		11/04/2008	37844	857
	<b>V</b>	<u>12</u>	Primary 2008		9/9/2008	1		09/09/2008	5954	492
	<b>v</b>	<u>13</u>	11/04/2014 GENERAL		11/4/2014	2		11/04/2014	32364	136
	<b>V</b>	<u>14</u>	08/12/2014 PRIMARY		8/12/2014	1		08/12/2014	5777	112
	<b>V</b>	<u>15</u>	08/13/2013 - PRIMARY		8/13/2013	1		08/13/2013	8	113
	<b>V</b>	<u>16</u>	11/06/2012 - GENERAL		11/6/2012	2		11/06/2012	45401	138
	<b>v</b>	<u>17</u>	08/14/2012 - PRIMARY		8/14/2012	1		08/14/2012	6159	114
			11/02/2010 - GENERAL		11/2/2010	2		11/02/2010	33474	132
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Last but not least you'll want to refresh the voter history percentages in your database.

Navigate to the Voters list, click [Search], select 'load all', and click [OK].



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#### Follow Edit > Set > Update Voter History %



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Click **[OK]** when prompted. *This may take many minutes or many hours depending on how many voters you have. In my example it took about 10 minutes for 70k voters.* 



Click [OK] to proceed with the voter history refresh.

## (may take some time if you have over a million voters in your databse)

The system won't provide an update when the process is complete but it will give you a status bar as it's underway. Once complete you can run search queries by voter history for things like your 'super voters':



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How to Import Voters, Elections, and Voter History from the State Voter Database into your Campaign's Local Database – (Political Only)



- Knowledge Base Articles
- 3rd Party Resources

### **Related Resources**

Article: Running an Import of Contact Data from Excel into your Database – Basic Overview Article: Start Import Article: Import Templates



Article: Pre-Import Check Article: Field/Column Mapping When Importing Voter/Donor Data Article: Import Information – Definitions and Column Data Type Article: Importing District Information – from Non Registered Voters **Article:** Importing Contributions Article: Automatically Conform Addresses Article: Auto-Merging Duplicate Address Records **Article:** Address Management Article: Why won't some of my records merge Article: Auto-Merge Duplicate Contact Records Article: Address Normalization (unlimited addresses per person) Article: Manually Merging Contact Records Video: Importin 102 Importing your first list Video: Attributes – Import with Date and Value Video: Importing 102 Merge or Do Not Merge during import Video: Importing 101 What to avoid Video: Importing Contributions

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\* As a policy we require that you have taken our intro training class before calling or emailing our live support team.

<u>*Click here*</u> to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.

\* After registering you'll receive a confirmation email with the instructions for how to log into the <u>GoToMeeting</u> session where we host our live interactive trainings.

\* This service *is* included in your contract.