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**Author:** Kristenson, Joel

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## Overview

This article provides a quick overview on how to import **voter history** data from a **.csv file**. It links to an **example spreadsheet** you can download to see how the columns **required** to be structured for this import.

If you need a hand with this please give us a call on our support line **1-866-909-8700**. *You may also need to send us your file so the data can be 'flipped' correctly so that elections are listed as rows instead of columns.*



**IMPORTANT!** The voters **must be in your database** \*prior\* to importing voter history AND they **must** have **SOS numbers**. [These videos](#) will get you started with running an import of voters.

**Tip:** Start a **new session** of **Trail Blazer** before running the import, and **close it afterwards**. It will make it a lot easier to pinpoint the session and [roll-it-back](#) if a mistake is made. You can also run a sample import of a few hundred records before importing a large list.

## Steps

**IMPORTANT:** When you open your .csv file in **Excel**, the **leading zeros** on the voter SOS numbers will be stripped (if they lead with a zero vs a letter). Here's an example:

	A	B
1	SOS as provided by Board of Elections	SOS as it appears when opened in Excel if care is not taken
2	000012345678	12345678

You need to take the necessary steps to open the file in Excel without stripping the leading zeros or the data won't merge properly with the existing data in your database. There are a variety of resources on Google that walk through the steps to open your .csv properly:

[https://www.google.com/?gws\\_rd=ssl#newwindow=1&q=excel+dropping+leading+zeros+csv](https://www.google.com/?gws_rd=ssl#newwindow=1&q=excel+dropping+leading+zeros+csv)

Here's [the link](#) to **download** our spreadsheet template which provides the **required column mapping** for voter history imports, along with notes, and tips.

## Importing Voter History Data – Import Steps and Example Spreadsheet with Required Column Formatting – Political Only

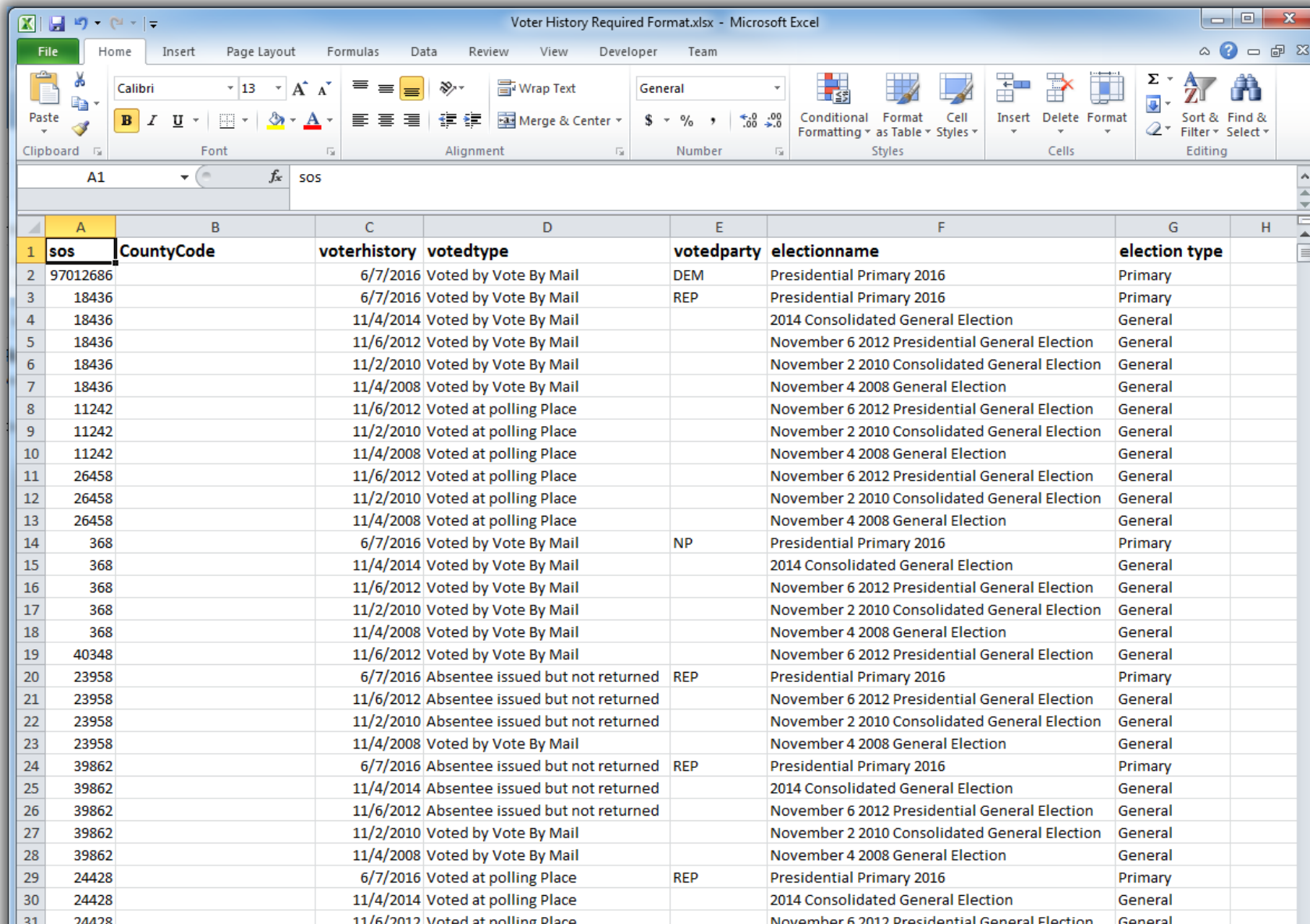
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Once you've downloaded the spreadsheet, **remove the columns** you don't need, remove the **tip section**, and **remove the \*first row\*** (*which is just a guideline*). Then replace the data in our example spreadsheet with your voter history data. *In my example I left the columns as is, and just removed the first line and the tip section.*

**IMPORTANT:** The Columns for '**electionname**' and '**election type**' will **not** be imported – you can either DELETE them from the spreadsheet prior to importing, or leave them as is. When you get to the column mapping part of the process, map them as **Do not Import**.

# Importing Voter History Data – Import Steps and Example Spreadsheet with Required Column Formatting – Political Only

**Remove the columns you don't need, the first row (so only the headers remain), and then save the file as a .csv file type.**



	A	B	C	D	E	F	G	H
1	sos	CountyCode	voterhistory	votedtype	votedparty	electionname	election type	
2	97012686		6/7/2016	Voted by Vote By Mail	DEM	Presidential Primary 2016	Primary	
3	18436		6/7/2016	Voted by Vote By Mail	REP	Presidential Primary 2016	Primary	
4	18436		11/4/2014	Voted by Vote By Mail		2014 Consolidated General Election	General	
5	18436		11/6/2012	Voted by Vote By Mail		November 6 2012 Presidential General Election	General	
6	18436		11/2/2010	Voted by Vote By Mail		November 2 2010 Consolidated General Election	General	
7	18436		11/4/2008	Voted by Vote By Mail		November 4 2008 General Election	General	
8	11242		11/6/2012	Voted at polling Place		November 6 2012 Presidential General Election	General	
9	11242		11/2/2010	Voted at polling Place		November 2 2010 Consolidated General Election	General	
10	11242		11/4/2008	Voted at polling Place		November 4 2008 General Election	General	
11	26458		11/6/2012	Voted at polling Place		November 6 2012 Presidential General Election	General	
12	26458		11/2/2010	Voted at polling Place		November 2 2010 Consolidated General Election	General	
13	26458		11/4/2008	Voted at polling Place		November 4 2008 General Election	General	
14	368		6/7/2016	Voted by Vote By Mail	NP	Presidential Primary 2016	Primary	
15	368		11/4/2014	Voted by Vote By Mail		2014 Consolidated General Election	General	
16	368		11/6/2012	Voted by Vote By Mail		November 6 2012 Presidential General Election	General	
17	368		11/2/2010	Voted by Vote By Mail		November 2 2010 Consolidated General Election	General	
18	368		11/4/2008	Voted by Vote By Mail		November 4 2008 General Election	General	
19	40348		11/6/2012	Voted by Vote By Mail		November 6 2012 Presidential General Election	General	
20	23958		6/7/2016	Absentee issued but not returned	REP	Presidential Primary 2016	Primary	
21	23958		11/6/2012	Absentee issued but not returned		November 6 2012 Presidential General Election	General	
22	23958		11/2/2010	Absentee issued but not returned		November 2 2010 Consolidated General Election	General	
23	23958		11/4/2008	Voted by Vote By Mail		November 4 2008 General Election	General	
24	39862		6/7/2016	Absentee issued but not returned	REP	Presidential Primary 2016	Primary	
25	39862		11/4/2014	Absentee issued but not returned		2014 Consolidated General Election	General	
26	39862		11/6/2012	Absentee issued but not returned		November 6 2012 Presidential General Election	General	
27	39862		11/2/2010	Voted by Vote By Mail		November 2 2010 Consolidated General Election	General	
28	39862		11/4/2008	Voted by Vote By Mail		November 4 2008 General Election	General	
29	24428		6/7/2016	Voted at polling Place	REP	Presidential Primary 2016	Primary	
30	24428		11/4/2014	Voted at polling Place		2014 Consolidated General Election	General	
31	24428		11/6/2012	Voted at polling Place		November 6 2012 Presidential General Election	General	

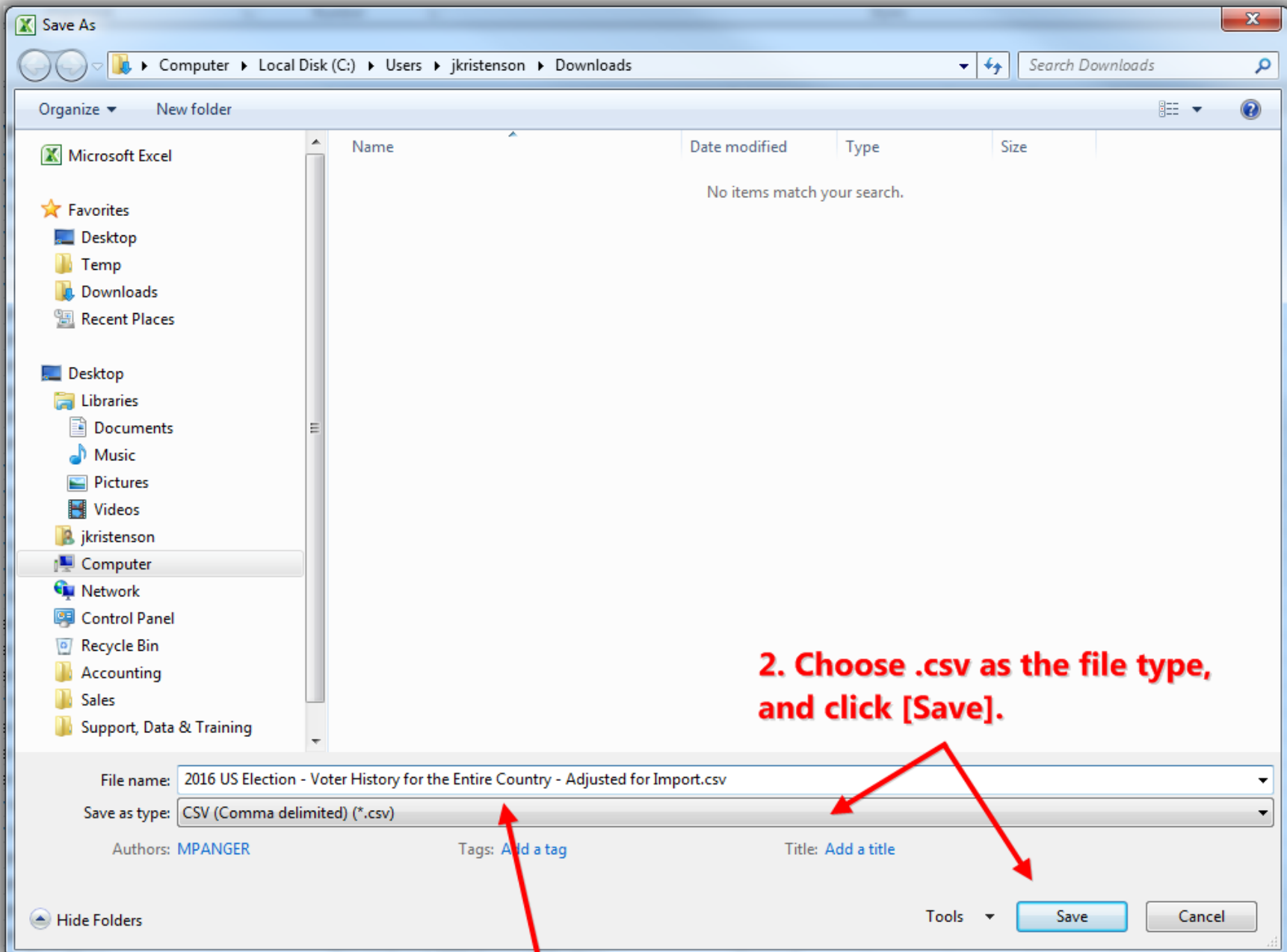
## Importing Voter History Data – Import Steps and Example Spreadsheet with Required Column Formatting – Political Only

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**Note:** The column labeled **'VoterHistory'** will create the name(s) of the election(s) in the database, so you could name them something like 'General Election MM/DD/YYYY' so that it makes more sense once the data is uploaded, or you can change these after the upload completes (covered later in this article).

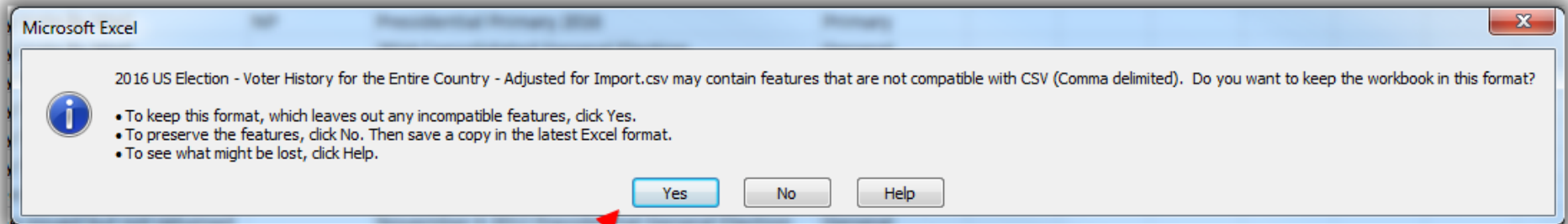
Once the file is prepped, **save it as a .csv** file type. *Make sure not to include special characters in the file type, my example is below.*

## Importing Voter History Data – Import Steps and Example Spreadsheet with Required Column Formatting – Political Only



## Importing Voter History Data – Import Steps and Example Spreadsheet with Required Column Formatting – Political Only

You'll get a warning when saving as a .csv, click **[Save]** to continue.

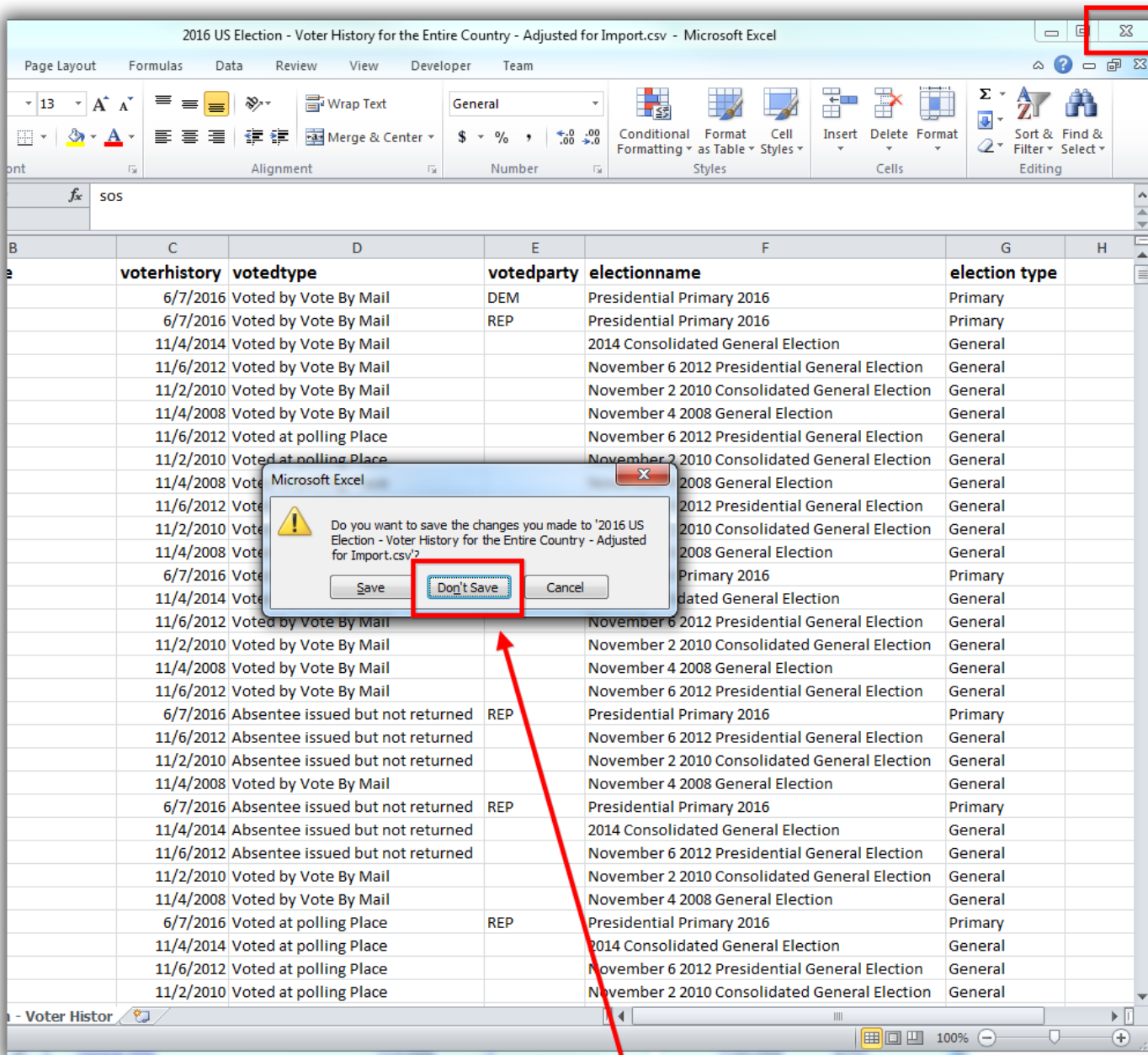


**Click [Yes] when prompted.**

Once the file is saved as a .csv, close the spreadsheet. Click **[Don't Save]** if Excel prompts you again with a warning.



## Importing Voter History Data – Import Steps and Example Spreadsheet with Required Column Formatting – Political Only



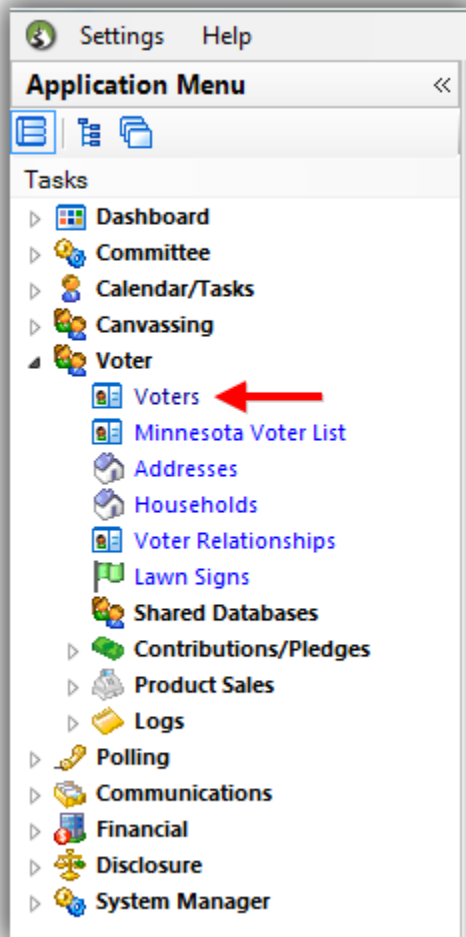
The screenshot shows the Microsoft Excel interface with a spreadsheet titled "2016 US Election - Voter History for the Entire Country - Adjusted for Import.csv". The spreadsheet has columns labeled "voterhistory", "votedtype", "votedparty", "electionname", and "election type". A dialog box is open, asking "Do you want to save the changes you made to '2016 US Election - Voter History for the Entire Country - Adjusted for Import.csv?'". The "Don't Save" button is highlighted with a red box. Another red box highlights the "X" button in the top right corner of the Excel window.

voterhistory	votedtype	votedparty	electionname	election type
6/7/2016	Voted by Vote By Mail	DEM	Presidential Primary 2016	Primary
6/7/2016	Voted by Vote By Mail	REP	Presidential Primary 2016	Primary
11/4/2014	Voted by Vote By Mail		2014 Consolidated General Election	General
11/6/2012	Voted by Vote By Mail		November 6 2012 Presidential General Election	General
11/2/2010	Voted by Vote By Mail		November 2 2010 Consolidated General Election	General
11/4/2008	Voted by Vote By Mail		November 4 2008 General Election	General
11/6/2012	Voted at polling Place		November 6 2012 Presidential General Election	General
11/2/2010	Voted at polling Place		November 2 2010 Consolidated General Election	General
11/4/2008	Voted at polling Place		November 4 2008 General Election	General
11/6/2012	Voted at polling Place		November 6 2012 Presidential General Election	General
11/2/2010	Voted at polling Place		November 2 2010 Consolidated General Election	General
11/4/2008	Voted at polling Place		November 4 2008 General Election	General
11/6/2012	Voted at polling Place		November 6 2012 Presidential General Election	General
11/2/2010	Voted at polling Place		November 2 2010 Consolidated General Election	General
11/4/2008	Voted at polling Place		November 4 2008 General Election	General
11/6/2012	Voted at polling Place		November 6 2012 Presidential General Election	General
11/2/2010	Voted at polling Place		November 2 2010 Consolidated General Election	General
11/4/2008	Voted at polling Place		November 4 2008 General Election	General
6/7/2016	Absentee issued but not returned	REP	Presidential Primary 2016	Primary
11/6/2012	Absentee issued but not returned		November 6 2012 Presidential General Election	General
11/2/2010	Absentee issued but not returned		November 2 2010 Consolidated General Election	General
11/4/2008	Voted by Vote By Mail		November 4 2008 General Election	General
6/7/2016	Absentee issued but not returned	REP	Presidential Primary 2016	Primary
11/4/2014	Absentee issued but not returned		2014 Consolidated General Election	General
11/6/2012	Absentee issued but not returned		November 6 2012 Presidential General Election	General
11/2/2010	Voted by Vote By Mail		November 2 2010 Consolidated General Election	General
11/4/2008	Voted by Vote By Mail		November 4 2008 General Election	General
6/7/2016	Voted at polling Place	REP	Presidential Primary 2016	Primary
11/4/2014	Voted at polling Place		2014 Consolidated General Election	General
11/6/2012	Voted at polling Place		November 6 2012 Presidential General Election	General
11/2/2010	Voted at polling Place		November 2 2010 Consolidated General Election	General

**1. Close the spreadsheet after prepping it and 'saving' it as a 'csv' file type.**

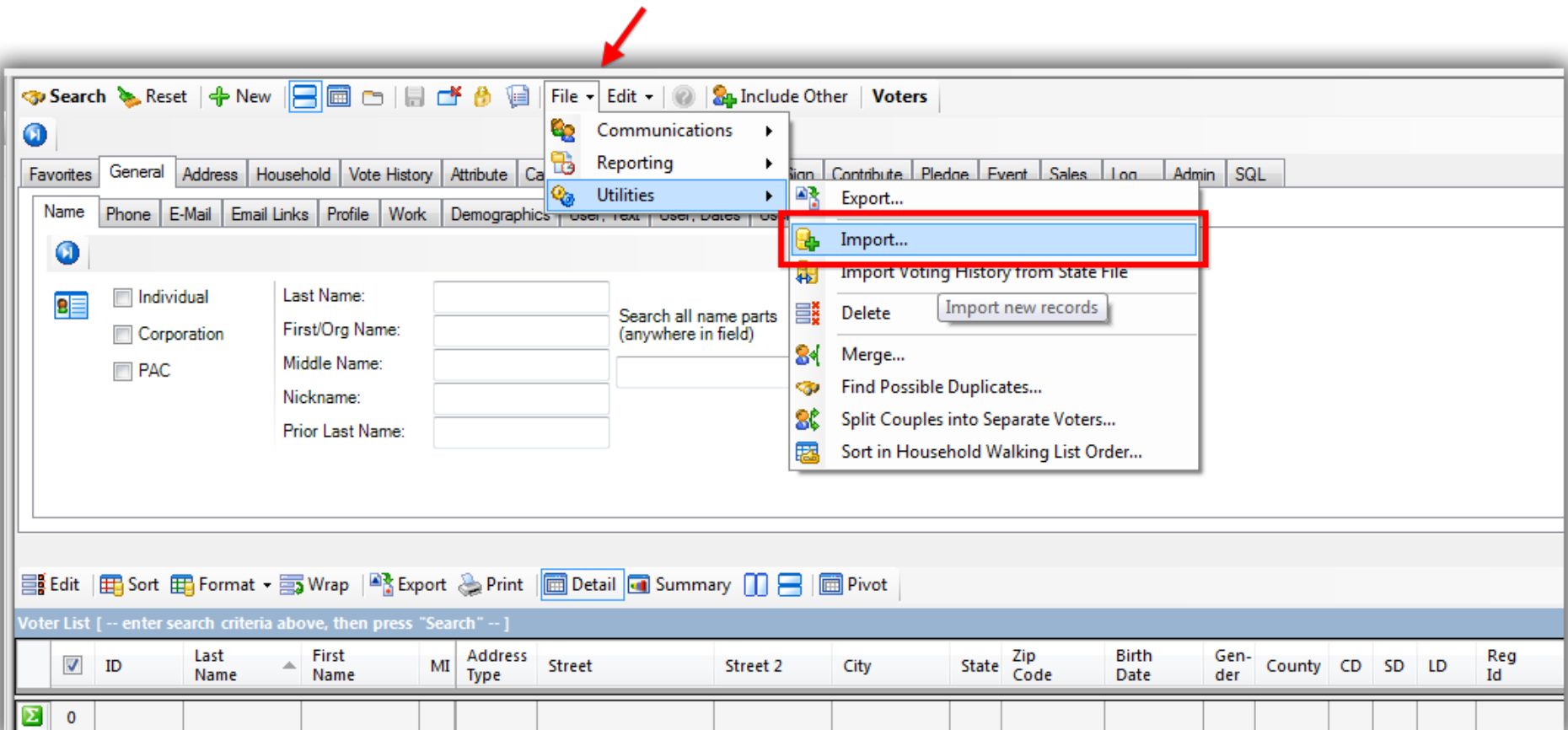
## Importing Voter History Data – Import Steps and Example Spreadsheet with Required Column Formatting – Political Only

Open your **Trail Blazer** database and navigate to the **Voters** (*Contacts*) list under the **Application Menu**.



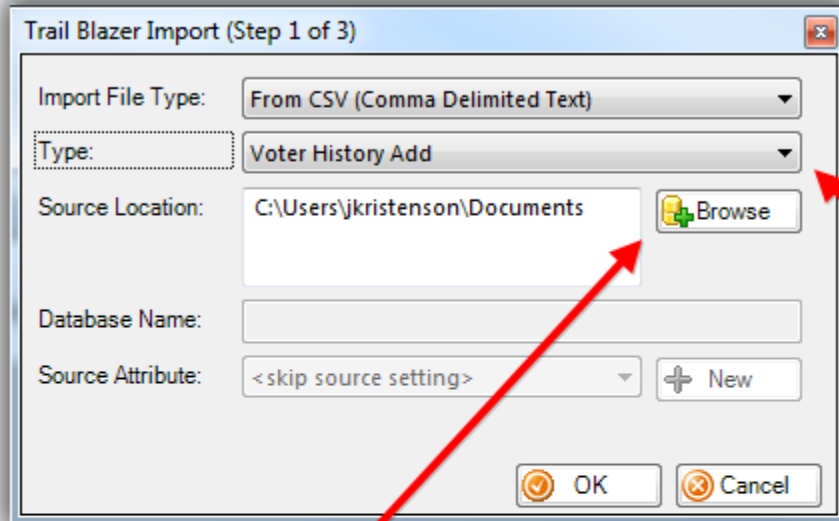
## Importing Voter History Data – Import Steps and Example Spreadsheet with Required Column Formatting – Political Only

Navigate to **File > Utilities > Import**. If you don't see this it means you don't have [appropriate security clearance](#) and you'll need to contact your system administrator.



The screenshot shows the TrailBlazer software interface. The 'File' menu is open, and the 'Utilities' option is selected. The 'Import...' option is highlighted with a red box. A red arrow points to the 'File' menu. The interface includes a search bar, a toolbar with options like 'Search', 'Reset', 'New', and 'Include Other', and a main area with tabs for 'General', 'Address', 'Household', 'Vote History', 'Attribute', and 'Ca'. Below the tabs are input fields for 'Last Name', 'First/Org Name', 'Middle Name', 'Nickname', and 'Prior Last Name'. At the bottom, there is a 'Voter List' table with columns for ID, Last Name, First Name, MI, Address Type, Street, Street 2, City, State, Zip Code, Birth Date, Gender, County, CD, SD, LD, and Reg Id.

Click on the **'Type'** drop-down and select **'Voter History Add'**.



Trail Blazer Import (Step 1 of 3)

Import File Type: From CSV (Comma Delimited Text)

Type: Voter History Add

Source Location: C:\Users\jkristenson\Documents

Database Name:

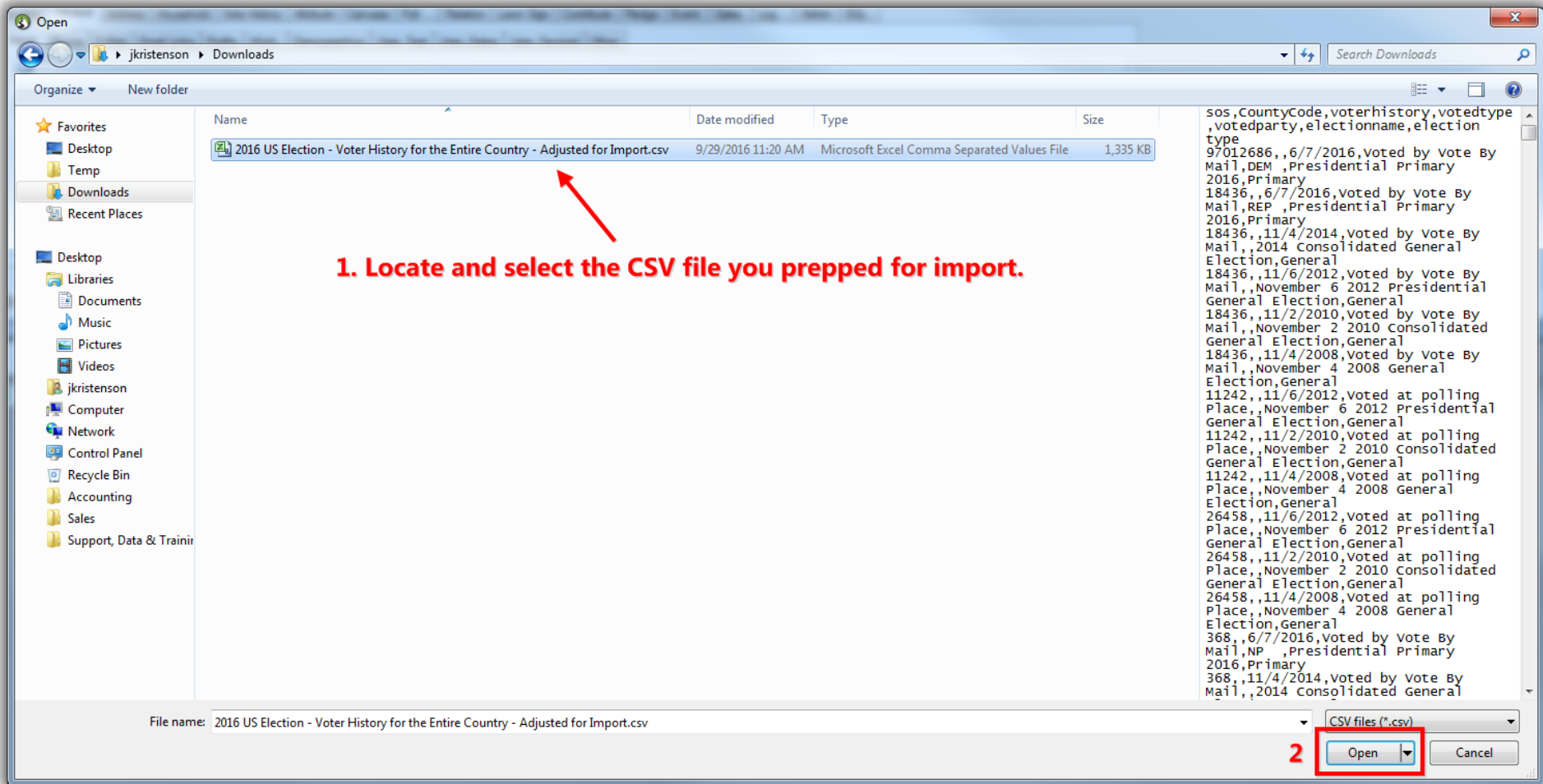
Source Attribute: <skip source setting>

**1. Select 'Voter History Add' from the drop-down.**

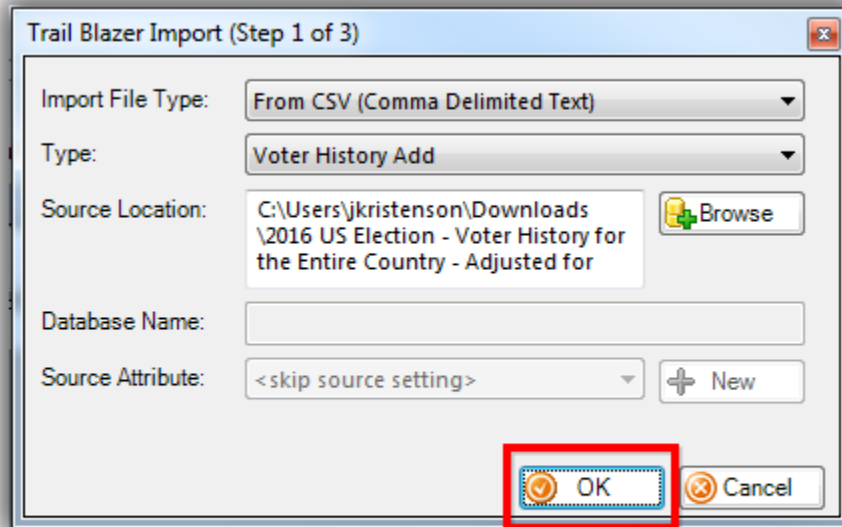
**2. Click [Browse] to locate the .csv you prepped in the previous steps.**

**Locate** and **select** the CSV file on your machine, and then click **[Open]**. *If you don't see the file make sure you have 'CSV' as the file 'type' in the lower-right of the window.*

## Importing Voter History Data – Import Steps and Example Spreadsheet with Required Column Formatting – Political Only



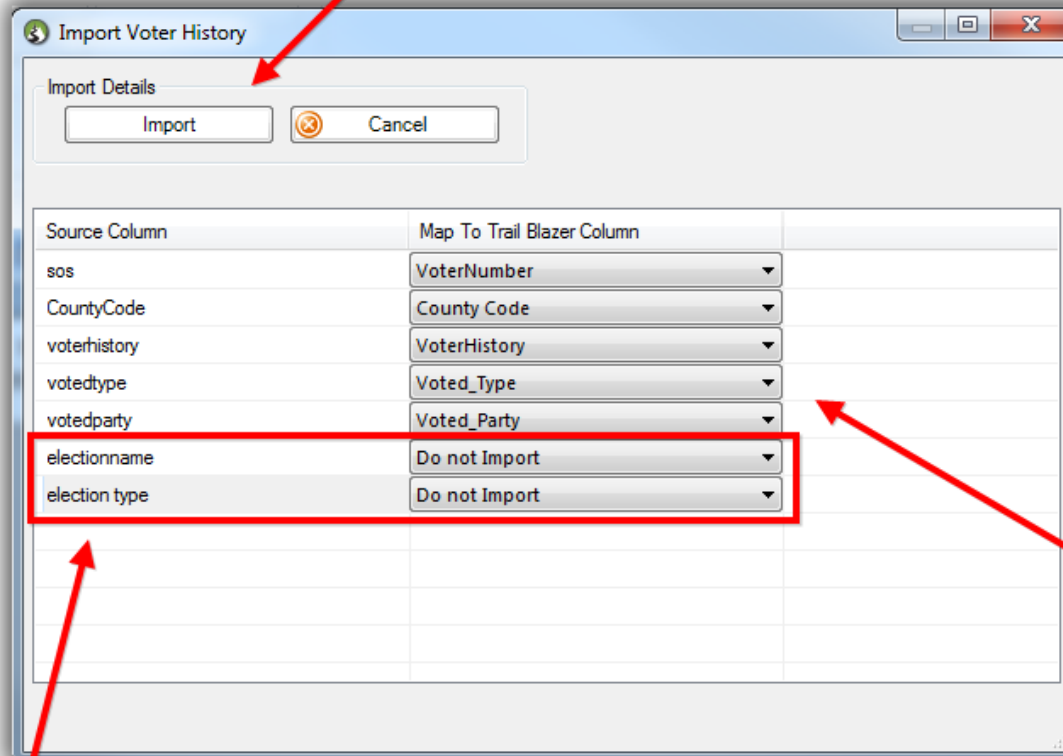
Once the file is selected, click [OK].



**Once your file has been selected, click [OK].**

This will bring up the **column mapping screen**. *\*If you named the columns in your spreadsheet the same we did in the example spreadsheet they'll automatically map to the correct import field—if that's not the case you'll need to map them accordingly by selecting the values from the drop-downs. In my example I left the two columns in my spreadsheet for 'electionname' and 'election type' which can be mapped to 'Do not Import'.*

### 3. After everything is mapped, click [Import].



Source Column	Map To Trail Blazer Column
sos	VoterNumber
CountyCode	County Code
voterhistory	VoterHistory
votedtype	Voted_Type
votedparty	Voted_Party
electionname	Do not Import
election type	Do not Import

**1. The columns should 'automatically' map \*if you left them the same way we have them in the example spreadsheet.**

**2. \*If you left these two columns in the spreadsheet you'll leave them as 'Do not Import'.**

**(Otherwise you'll need to click the drop-down and map them accordingly).**

## Importing Voter History Data – Import Steps and Example Spreadsheet with Required Column Formatting – Political Only

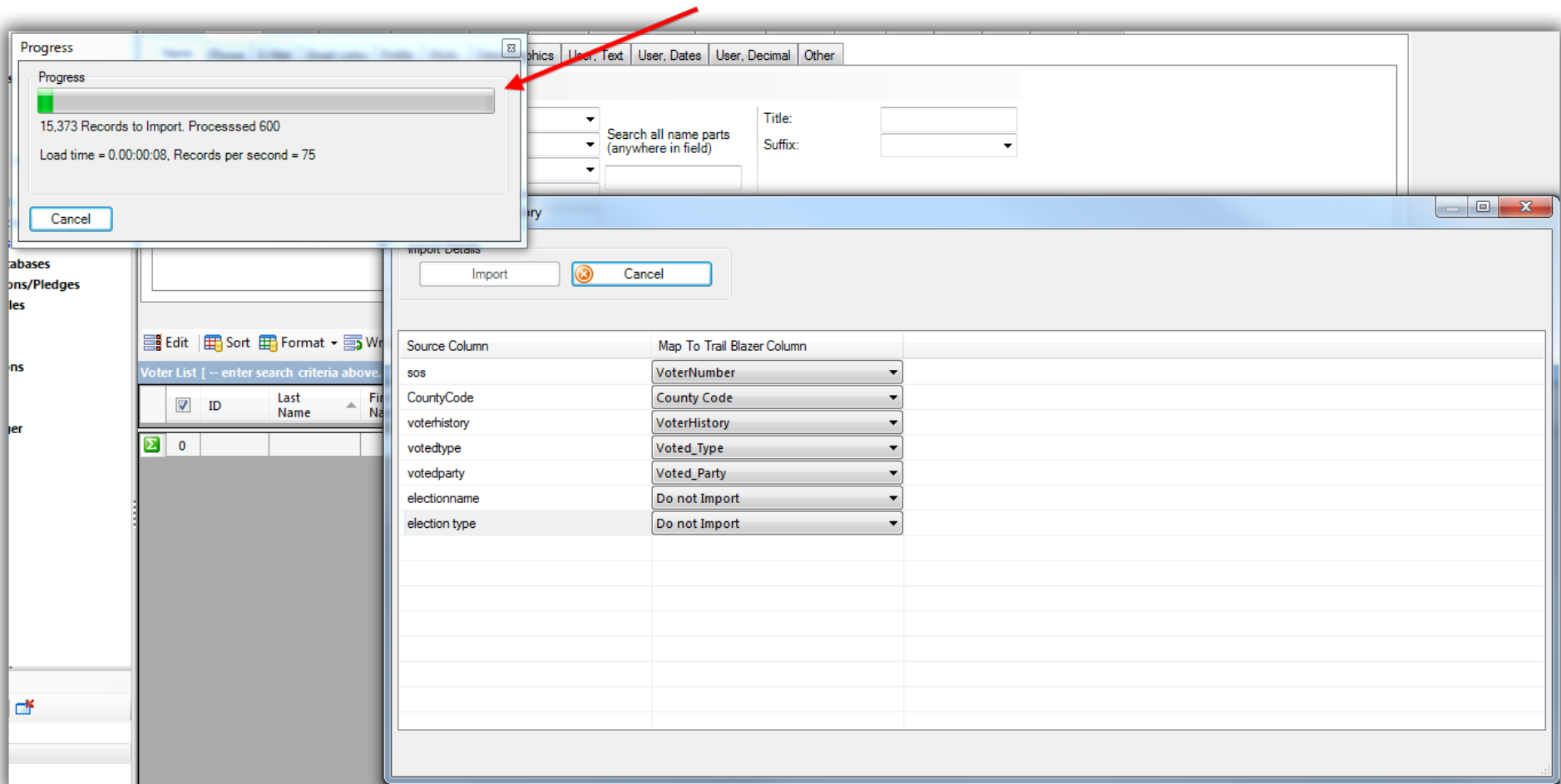
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Click **[Import]** to proceed.

If everything is working correctly you'll get a load animation that displays the status of the import. *My example is below.*



**If the import is running correctly you'll get this load animation, if it isn't you'll get an error message.**



The screenshot shows the TrailBlazer interface during an import process. A 'Progress' dialog box is open in the foreground, displaying a progress bar and the following information:

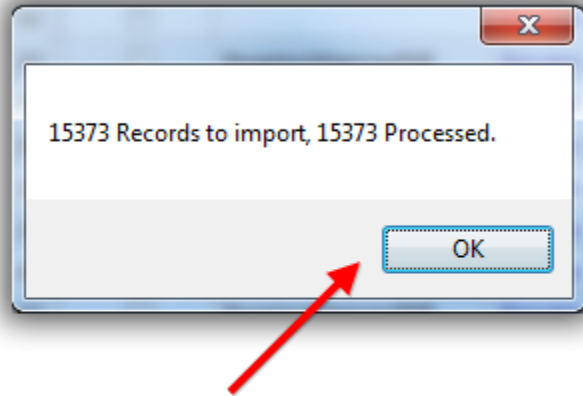
- Progress
- 15,373 Records to Import. Processed 600
- Load time = 0.00:00:08, Records per second = 75
- Cancel button

In the background, the 'Import Details' window is visible, showing a table with the following columns and rows:

Source Column	Map To Trail Blazer Column
sos	VoterNumber
CountyCode	County Code
voterhistory	VoterHistory
votedtype	Voted_Type
votedparty	Voted_Party
electionname	Do not Import
election type	Do not Import

A red arrow points from the text above to the progress bar in the dialog box.

Once the import is complete you'll get a notification with the results, click **[OK]**. *My example is below.*



**You'll get a popup message when the import has finished, click [OK].**

Once you're all done you can update voter counts under **System Manager > Lists > Election, Voter History > File > Set Voter Counts.**

## Importing Voter History Data – Import Steps and Example Spreadsheet with Required Column Formatting – Political Only

**5 refresh after count update**

**2** Search

**3** File

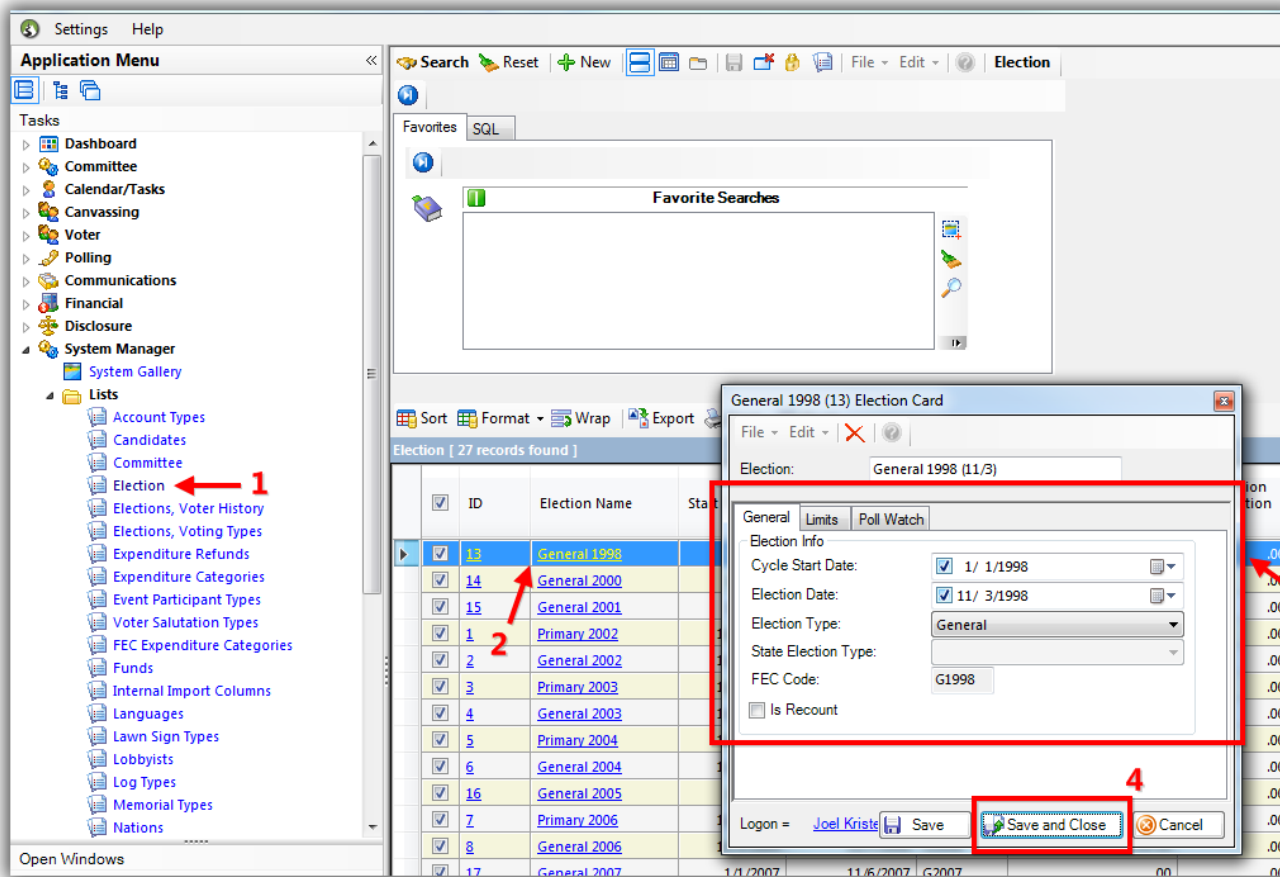
**4** Set Voter Counts

**1** Elections, Voter History

	<input checked="" type="checkbox"/>	ID	Election Name	Short Name	Election Date	Election Type	Partisan Election	Import Code Format	Voter Count
	<input checked="" type="checkbox"/>	4	Primary 2004		9/14/2004	1	<input checked="" type="checkbox"/>	09/14/2004	48004
	<input checked="" type="checkbox"/>	3	General 2004		11/2/2004	2	<input type="checkbox"/>	11/02/2004	42701
	<input checked="" type="checkbox"/>	2	Primary 2005		9/13/2005	1	<input type="checkbox"/>	09/13/2005	4814
	<input checked="" type="checkbox"/>	1	General 2005		11/8/2005	2	<input type="checkbox"/>	11/08/2005	4041
	<input checked="" type="checkbox"/>	8	Primary 2006		9/12/2006	1	<input type="checkbox"/>	09/12/2006	8267
	<input checked="" type="checkbox"/>	7	General 2006		11/7/2006	2	<input type="checkbox"/>	11/07/2006	29696
	<input checked="" type="checkbox"/>	12	Primary 2008		9/9/2008	1	<input type="checkbox"/>	09/09/2008	5953
	<input checked="" type="checkbox"/>	11	General 2008		11/4/2008	2	<input type="checkbox"/>	11/04/2008	37843
	<input checked="" type="checkbox"/>	10	Primary 2010		8/10/2010	1	<input type="checkbox"/>	08/10/2010	8620
	<input checked="" type="checkbox"/>	9	General 2010		11/2/2010	2	<input type="checkbox"/>	11/02/2010	28827
	<input checked="" type="checkbox"/>	13	General 2011		11/8/2011	2	<input type="checkbox"/>	11/08/2011 - Ge...	2636
	<input checked="" type="checkbox"/>	15	Primary 2012		8/14/2012	1	<input type="checkbox"/>	08/14/2012 - PRI...	6588
	<input checked="" type="checkbox"/>	14	General 2012		11/6/2012	2	<input type="checkbox"/>	11/06/2012 - GE...	48263
	<input checked="" type="checkbox"/>	16	General 2013		11/5/2013	2	<input type="checkbox"/>	11/05/2013	3429
	<input checked="" type="checkbox"/>	18	Primary 2014		8/12/2014	1	<input type="checkbox"/>	08/12/2014 PRI...	6003
	<input checked="" type="checkbox"/>	17	General 2014		11/4/2014	2	<input type="checkbox"/>	11/04/2014 - GE...	33460

## Importing Voter History Data – Import Steps and Example Spreadsheet with Required Column Formatting – Political Only

You can also **rename the elections** and **update other information** (such as the dates and **contribution limits**) by clicking on each election name and inputting the respective information. *My example is below.*



The screenshot shows the TrailBlazer application interface. On the left is the 'Application Menu' with a 'Lists' folder containing 'Election'. A red arrow labeled '1' points to 'Election'. The main window displays a table of elections with columns for ID, Election Name, and State. A red arrow labeled '2' points to the 'General 1998' row. An 'Election Card' dialog box is open for 'General 1998 (13)'. It has tabs for 'General', 'Limits', and 'Poll Watch'. A red arrow labeled '3' points to the 'General' tab. The 'General' tab contains fields for 'Cycle Start Date' (1/ 1/1998), 'Election Date' (11/ 3/1998), 'Election Type' (General), and 'State Election Type'. A red arrow labeled '4' points to the 'Save and Close' button at the bottom of the dialog box.

**3 - Go through the different tabs and fill out the relevant information such as:**

- Election Name
- Start/End Date
- Contribution Limits
- Active it for mobile poll watching

The **Related Resources** below link to a variety of similar articles and videos on importing.



**Trail Blazer**

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

## Related Resources

**3<sup>rd</sup> Party Resource:** [Google Search for Tutorials on How to Open a .CSV in Excel without Removing Leading Zeros](#)

**Article:** [Import Templates](#)

**Article:** [How to Import Voters, Elections, and Voter History from the State Voter Databases into your Campaign's Local Database – \(Political Only\)](#)

**Article:** [Field/Column Mapping When Importing Voter/Donor Data](#)

**Article:** [Start Import](#)

**Article:** [Running an Import of Contact Data from Excel into your Database – Basic Overview](#)

**Article:** [Pre-Import Check](#)

**Article:** [Importing Contributions](#)

**Article:** [Import Information – Definitions and Column Data Type](#)

**Article:** [How to Configure your RDP \(Remote Desktop\) Setting on a PC to Allow Access to your Clipboard, and Disk Drives](#)

**Article:** [Rollback – Undo Function](#)

**Video Playlist:** [Importing](#)

## Trail Blazer Live Support

☎ **Phone:** 1-866-909-8700

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

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

t **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.*