

Author: Joel Kristenson Last Updated: 2016-07-25

### **Overview**

This article walks through the steps to display 'system generated' log notes within a contact's record card.

**Tip:** This feature enhancement was added because of a few customers who were getting annoyed of the **system generated** log notes intermingling with their own <u>hand entered log notes</u>. If you ever notice something that would greatly improve the software for all other users, we encourage you to add those requests through the **Comments Box** on our **Start Page**.



# <u>Steps</u>

Navigate to the Contacts (Voters/Donors) list under the Application Menu.





### Query for and open the person's contact record. *I used my own record 'Joel Kristenson' for this example.*

#### 🦘 Search 🔖 Reset | 🕂 New 🔚 🥅 😁 | 🔚 🌁 😚 | File 🝷 Edit 👻 🎯 🎥 Include Other | Contacts 0 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 0 🔲 Individual Last Name: Kristenson • Title: 9 Search all name parts First/Org Name: Suffix: -Corporation (anywhere in field) Middle Name: Foundation Nickname: Prior Last Name: 📑 Edit 📲 Sort 🌐 Format 🛛 🚍 Wrap 👫 Export 🔈 Print 🗐 Detail 🖪 Summary 🕕 🚍 🗐 Pivot Contacts [ 1 records found ] Address Street Zip Home V ID First Name State **Bus Phone** Title Last Name Street City Cell Phone Email Employer/Company Name Туре Code Phone 2 ▶ 🔽 12796 Senor Golden Valley Home (218) 442-1919 (218) 370-1064 (866) 909-870 Σ 1

### Search for the contact record you want to view log notes for, and open their record.

Navigate to the Logs tab where you'll find a list of any current 'hand-entered' log notes. My example is below where it currently shows 10 of 134 log notes.



### How to Display the 'System Generate' Log Notes that are Now Suppressed by Default – 2016 System Enhancement

File - Edit - 🗙	0 0 2 0	ት 왔 🛛 Joel Kristenson [1279	6]				_			_			_	
Title:	Title: Senor													
First Name	Joel			Apt 10 Beware of cate (street 3 merce field)										
Middle Name	Middle Name Golden Valley, MN 55427													
Last Name/Suffix	Last Name/Suffix Kristenson Table Final													
Prior Last Name	Prior Last Name Work Address													
Nickname	Nickname Senor Pepé													
Contact Type:	Contact Type: Individual No Address													
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17350 7/22	2/2013 4:19 PM	Sent first welcome letter, reque	est a phone call follow-up.		SentMailing	.00	118	8/22/2013	1 Month Phone Call Follow-up	\$ Am	t or Hrs:	.00		
17175 6/8/	/2014 3:25 PM	Test		Joel Kristenson	Note	.00					Add/Open F	leminder		
17133 1/22	2/2015 2:29 PM	Followup reminder, call this do	onor and thank them.	Joel Kristenson	Note	.00	114	3/22/2017	Followup phone call	Testi	ng email log m	erge fields.		
17351 1/12	2/2015 4:20 PM	Helped with Math, feel bad for	r the person who had to I		Volunteer Hours - Tutoring	8.75								
17174 6/8	2015 3:25 PM	Test		Joel Kristenson	Note	.00								
17176 7/30	0/1015 8:24 AM	Testing double-opt in for the (	Global Ethics issue that A	Admin Admin	Sign Up Comment	.00								
17193 11/2	24/1015 9:14 AM	Import Contributions Column	Mapping. Add new Cont	Joel Kristenson	Note	.00								
17223 4/26	6/2015 9:41 AM	Import Contacts Column Mapp	oing. Merging Contacts w	Joel Kristenson	Note	.00								
17227 4/26	17227 4/26/2010 9:44 AM Import Contacts Column Mapping. Merging Contacts w Joel Kristenson Note .00													
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By defau	in the syst	tem will now "only	snow log note	is that were	e nand entered									
or other	critical lo	g notes generated	by the system.	10 out of	134 are showing	in my	exa	mple, pr	ior to					
displayin	ng the rest	t.												

From the tool strip, click on the [Show Suppressed] button to display the rest of the log notes, that are now hidden from view by default.



Title	:	Senor	•		Home Addre	55							
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Mida	la Nama	7001		$\langle \rangle$	Beware of cats (street 3 merge field) Golden Valley, MN 55427								
Midd	News/C.#			No Photo	218-442-19	19							
Last	Name/Sum	IX Kristenson	<b>T</b>	Email		Click on th	e [Sho	w Suj	ppresse	d] button			
Prio	Last Nam	e		jkristenson@trailblz.com	Work Addre	ss to display a	all log	note	s (inclue	dina the			
Nick	name	Senor Pepé			No Address	system der	orato	d one	c) that	aro			
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After the button is clicked **\*all\*** the log notes will display. *My example is below.* 



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	17213	3/21/2016 12:15 PM	Contact record [14822] merged with 1	this contact record [	Admin Admin	Combine Comment	.00				
	17216	4/5/2016 12:21 PM	Contact record [14825] merged with t	this contact record [	Admin Admin	Combine Comment	.00				
	17219	4/5/2016 12:22 PM	Contact record [14826] merged with	this contact record [	Admin Admin	Combine Comment	.00				
	17221	4/5/2016 12:23 PM	Contact record [14827] merged with	this contact record [	Admin Admin	Combine Comment	.00				
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	17227	4/26/2016 9:44 AM	Import Contacts Column Mapping. N	lerging Contacts w	Joel Kristenson	Note	.00				
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	17236	6/10/2016 2:44 PM	Contact record [14850] merged with t	this contact record [	Admin Admin	Combine Comment	.00				
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	17246	6/14/2016 9:35 AM	Contact record [14859] merged with	this contact record [	Admin Admin	Combine Comment	.00				
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You can perform many actions at this point such exporting, printing, and deleting the log notes in the grid. The screenshot below provides details.



### How to Display the 'System Generate' Log Notes that are Now Suppressed by Default – 2016 System Enhancement

Ie v Edit v First Name Middle Name Last Name/Suf Prior Last Nam Vickname Contact Type:	Senor Joel fix Kristenson se Senor Pepé Individual	Joel Kristenson [12790]      No Photo      Email     jkristenson@trailblz.cc	Home Addre 31 IU Golde Apt 10 Beware of c Golden Vall 218.442-19 Work Addres No Address	ss n Valley Kd ats (street 3 merge field) ey, MN 55427 19 ss yc us	ou car ing tł	ı dele 1e bu	te, exp	port, or pr on this too	int log not ol strip.	es that are in the grid			
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Log [134 rec	ords found]								Log Type:	Combine Comment 👻			
ID	Created	Text	Ву	Туре	S or	Rem	Reminder	Reminder Subject	Log Date:	7/21/2016			
17349	7/21/2016 3:00 PM	Contact record (14907) merged with this contact reco	loel Kristenson	Combine Comment		10	Date		\$ Amt or Hrs:	.00			
17348	7/21/2016 3:00 PM	Contact record [14903] merged with this contact reco	Joel Kristenson	Combine Comment	.00				E Add/Ope	- Parrinder			
17347	7/21/2016 3:00 PM	Contact record [14902] merged with this contact reco	Joel Kristenson	Combine Comment	.00				Contact record I	n Reminder			
17346	7/21/2016 3:00 PM	Contact record [14901] merged with this contact reco	Joel Kristenson	Combine Comment	.00								
17345	7/21/2016 3:00 PM	Contact record [14900] merged with this contact reco	Joel Kristenson	Combine Comment	.00				Field Employer of	,Home data 2183/01064 discarded. Jer data "Trail Blazer Campaign Services" discarded.			
17344	7/21/2016 3:00 PM	Contact record [14899] merged with this contact reco	Joel Kristenson	Combine Comment	.00				Field Occupatio	n data "Professional Dishwasher" discarded.			
17343	7/21/2016 3:00 PM	Contact record [14898] merged with this contact reco	Joel Kristenson	Combine Comment	.00								
17342	7/21/2016 3:00 PM	Contact record [14897] merged with this contact reco	Joel Kristenson	Combine Comment	.00				_				
17341	7/21/2016 3:00 PM	Contact record [14896] merged with this contact reco	Joel Kristenson	Combine Comment	.00				_				
17340	7/21/2016 3:00 PM	Contact record [14895] merged with this contact reco	Joel Kristenson	Combine Comment	.00				_				
17339	7/21/2016 3:00 PM	Contact record [14894] merged with this contact reco	Joel Kristenson	Combine Comment	.00				_				
17330	7/21/2016 3:00 PM	Contact record [14893] merged with this contact reco	Joel Kristenson	Combine Comment	.00				- 1				
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17332	7/21/2016 3:00 PM	Contact record [14887] merged with this contact reco	Joel Kristenson	Combine Comment	.00								
17331	7/21/2016 3:00 PM	Contact record [14886] merged with this contact reco	Joel Kristenson	Combine Comment	.00								
17330	7/21/2016 3:00 PM	Contact record [14885] merged with this contact reco	Joel Kristenson	Combine Comment	.00								
17329	7/21/2016 3:00 PM	Contact record [14884] merged with this contact reco	Joel Kristenson	Combine Comment	.00								
17328	7/21/2016 3:00 PM	Contact record [14883] merged with this contact reco	Joel Kristenson	Combine Comment	.00				_				
17327	7/21/2016 3:00 PM	Contact record [14882] merged with this contact reco	Joel Kristenson	Combine Comment	.00				_				
17326	7/21/2016 3:00 PM	Contact record [14881] merged with this contact reco	Joel Kristenson	Combine Comment	.00								
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- YouTube Channel

- Knowledge Base Articles

- 3rd Party Resources



### **Related Resources**

Article: Adding Log Notes, Mass Log Notes & Reminders
Article: Adding Log Types
Article: PayPal Error Codes and Warning Codes
Article: Vanco Response Codes and Error Code Messages
Article: How to Track Volunteer Hours in Trail Blazer, and How to Build a Pivot Report that Summarizes Volunteer's Hours
Article: Tracking Grants in Trail Blazer – Requested, Denied, Approved, and How to Build a Pivot Summary Report Off the Data
Article: Are you able to print custom issues/groups and/or log entries on walk/call sheets?
Article: Log Notes vs User Fields vs Attributes
Article: SQL Shrinking the Transaction Log
Video: Getting Started 101 – Orientation to the screen
Video: Getting Started 105 – Queries with an AND condition
Video: Getting Started 102 – Beginning Queries
Video: Getting Started 104 – Queries with wildcards



# **Trail Blazer Live Support**

- **C** Phone: 1-866-909-8700
- Email: <a href="mailto:support@trailblz.com">support@trailblz.com</a>
- Facebook: https://www.facebook.com/pages/Trail-Blazer-Software/64872951180
- Twitter: <u>https://twitter.com/trailblazersoft</u>

\* 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.