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Overview

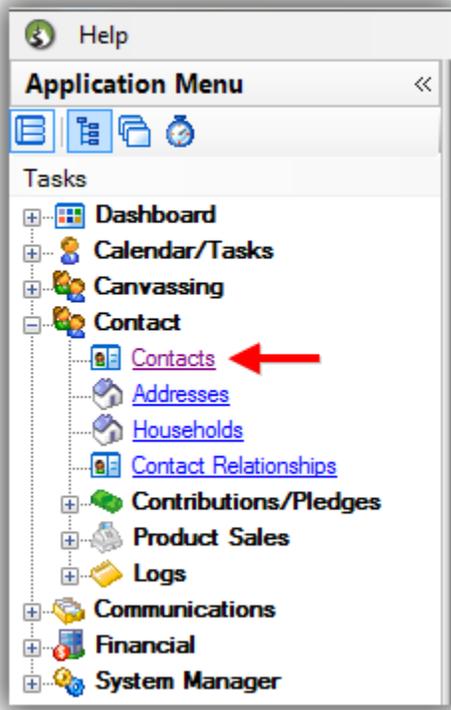
This article will teach you how to query for a list of contacts (*Donors/Voters*) in your database and then set an attribute for the entire list at once. In this particular example I set an attribute called “**VIP Donor**” to any donor that gave over \$10,000 at one time, using this mass update utility.

IMPORTANT! This article assumes you already know how to create [Attribute Folders, and Attribute Items](#). If you’ve never created attributes before, it’s covered in our free weekly intro training class which can sign up for [here](#).

 **Tip:** Using this process you can perform a wide variety of tasks such as: Tracking which contacts have received certain mass mailings such as Christmas Cards, Appeal Letters, Pledge Letters, etc.

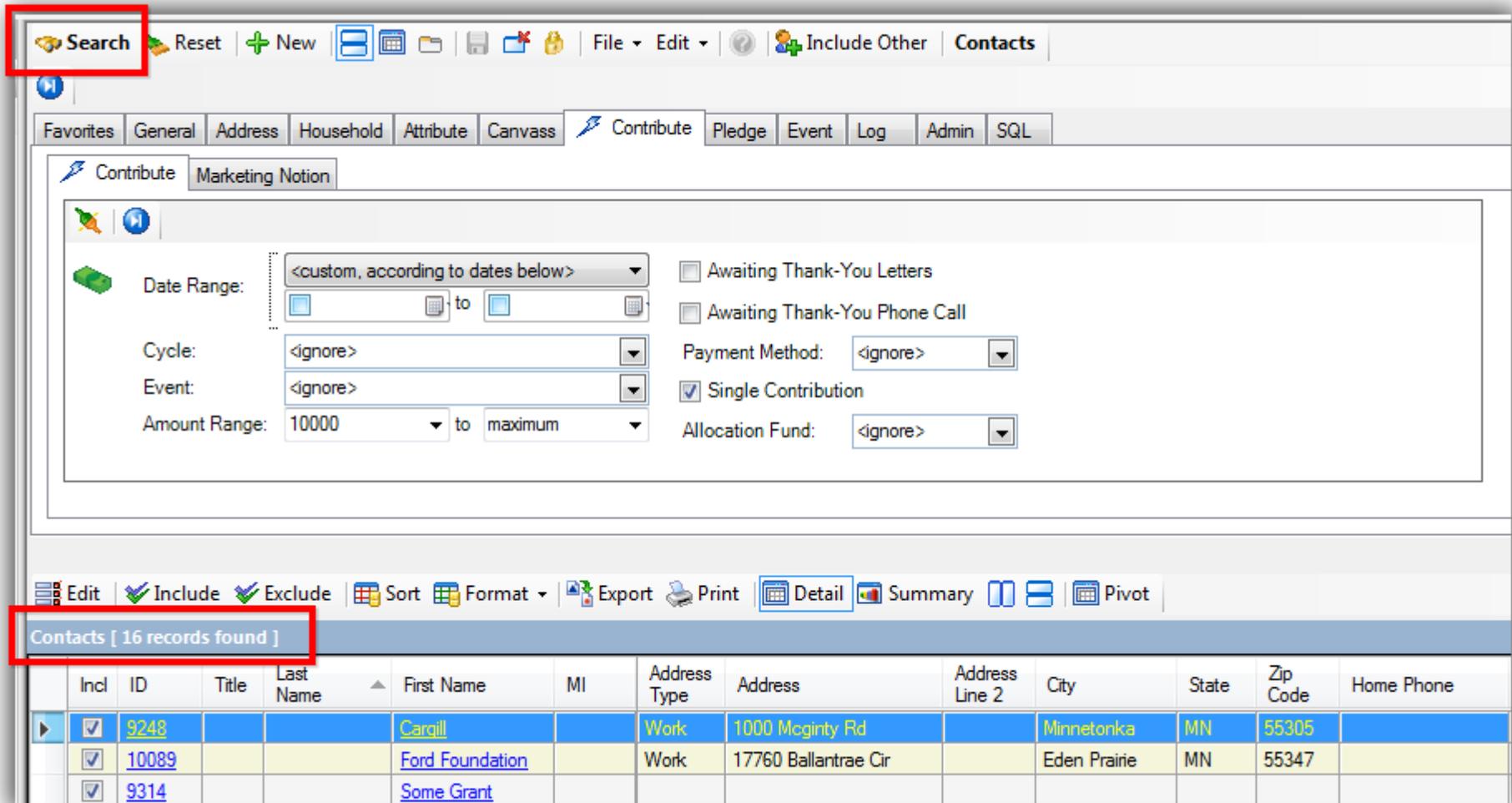
Steps

Navigate to the Contacts (*Voter/Donor*) list.



Build and run your [search query](#). *In this example I queried for everyone who's given over 10k dollars at one time, which populated **16** contact records as shown in the image below.*

Build and run your search query.



The screenshot shows the TrailBlazer search interface. At the top, the 'Search' button is highlighted with a red box. Below it, there are tabs for 'Favorites', 'General', 'Address', 'Household', 'Attribute', 'Canvass', 'Contribute', 'Pledge', 'Event', 'Log', 'Admin', and 'SQL'. The 'Contribute' tab is selected, and a 'Marketing Notion' sub-tab is active. The search criteria are as follows:

- Date Range: <custom, according to dates below>
- Cycle: <ignore>
- Event: <ignore>
- Amount Range: 10000 to maximum
- Awaiting Thank-You Letters:
- Awaiting Thank-You Phone Call:
- Payment Method: <ignore>
- Single Contribution:
- Allocation Fund: <ignore>

Below the search criteria, there is a toolbar with options: Edit, Include, Exclude, Sort, Format, Export, Print, Detail, Summary, and Pivot. The 'Include' button is highlighted with a red box. Below the toolbar, a status bar shows 'Contacts [16 records found]' in a blue box. The results are displayed in a table with the following columns: 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"/>	9248			Cargill		Work	1000 McGinty Rd		Minnetonka	MN	55305	
<input checked="" type="checkbox"/>	10089			Ford Foundation		Work	17760 Ballantrae Cir		Eden Prairie	MN	55347	
<input checked="" type="checkbox"/>	9314			Some Grant								

If you don't want to set your attribute for certain contacts in the list you can uncheck their records from the **Include** column. *In my example I unchecked two from my list of 16 giving me a final count of 14.*

Edit Include Exclude Sort Format Export Print Detail Summary Pivot

Contacts [16 records found]

	Incl	ID	Title	Last Name	First Name	MI	Address Type	Address	Address Line 2	City	State	Zip Code	Home Phone
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9248			Carroll		Work	1000 McGinty Rd		Minnetonka	MN	55305	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10089			Ford Foundation		Work	17760 Ballantrae Cir		Eden Prairie	MN	55347	
<input type="checkbox"/>	<input type="checkbox"/>	9314			Some Grant								
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9280			Towne Bank		Work	123 E Main		Norfolk	VA	23510	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9471		Chaput	Victoria		Work	400 Selby Ave	Suite Y	St Paul	MN	55102	
<input type="checkbox"/>	<input type="checkbox"/>	10699	Mr.	Gordon	Scott		Home	78911 Hampton Dr N		Edmore	MI	48829	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9260		Gore	Paul	Michael	Home	1311 Cleveland Ave N		St Paul	MN	55108	(651) 646-8894
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9263		Green	Lynn								
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9429		Henegar	Takara	I	Home	2610 Emerson Ave		Minneapolis	MN	55408	(612) 123-9999
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9253		Keohane	Kaaren	Evelyn	Home	1735 Orchid Dr N		North Mankato	MN	56003	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12796	Mr.	Kristenson	Joel		Home	9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10964		McSpadden	Laur	Marie	Home	604 College Ave		New Paris	IN	46553	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9378	Ms.	Miner	Kris	Ann	Home	876 Helen St		River Falls	WI	54022	(715) 220-5658
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9473		Walters	Barbara		Home	6876 Monroe St		Minneapolis	MN	55432	(123) 454-6666
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12823		Williams	Susanna		Home	3000 4th St NE		Renton	WA	98056	(425) 333-4123
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9468	Ms.	Withey	Jessica		Work	424 Main St E		Edmore	MI	48829	(155) 555-5555
	14												

You can uncheck certain contacts from the 'Include' column if you don't want to set the attribute for them.



Click the **Edit** drop-down menu from the search tool strip, follow **Set**, and select **Set Attributes**.

The screenshot shows the TrailBlazer software interface. At the top, there is a toolbar with icons for Search, Reset, New, and other functions. Below the toolbar is a navigation pane with tabs for Favorites, General, Address, Household, Attribute, and Canvass. The main area is divided into a form for contribution details and a table of contacts. The 'Edit' menu is open, and the 'Set Attributes...' option is highlighted with a red box. A red arrow points to the 'Edit' menu. A tooltip 'Set or Clear Attributes from Contacts' is visible over the 'Set Attributes...' option.

The contribution form includes fields for Date Range, Cycle, Event, Amount Range, and Allocation Fund. The 'Amount Range' field is set to '10000' to 'maximum'. The 'Single Contribution' checkbox is checked.

The contacts table shows 16 records found. The table has columns for Incl, ID, Title, Last Name, First Name, MI, Address Type, Address, Address Line 2, City, State, Zip Code, and Home Phone. Two records are visible:

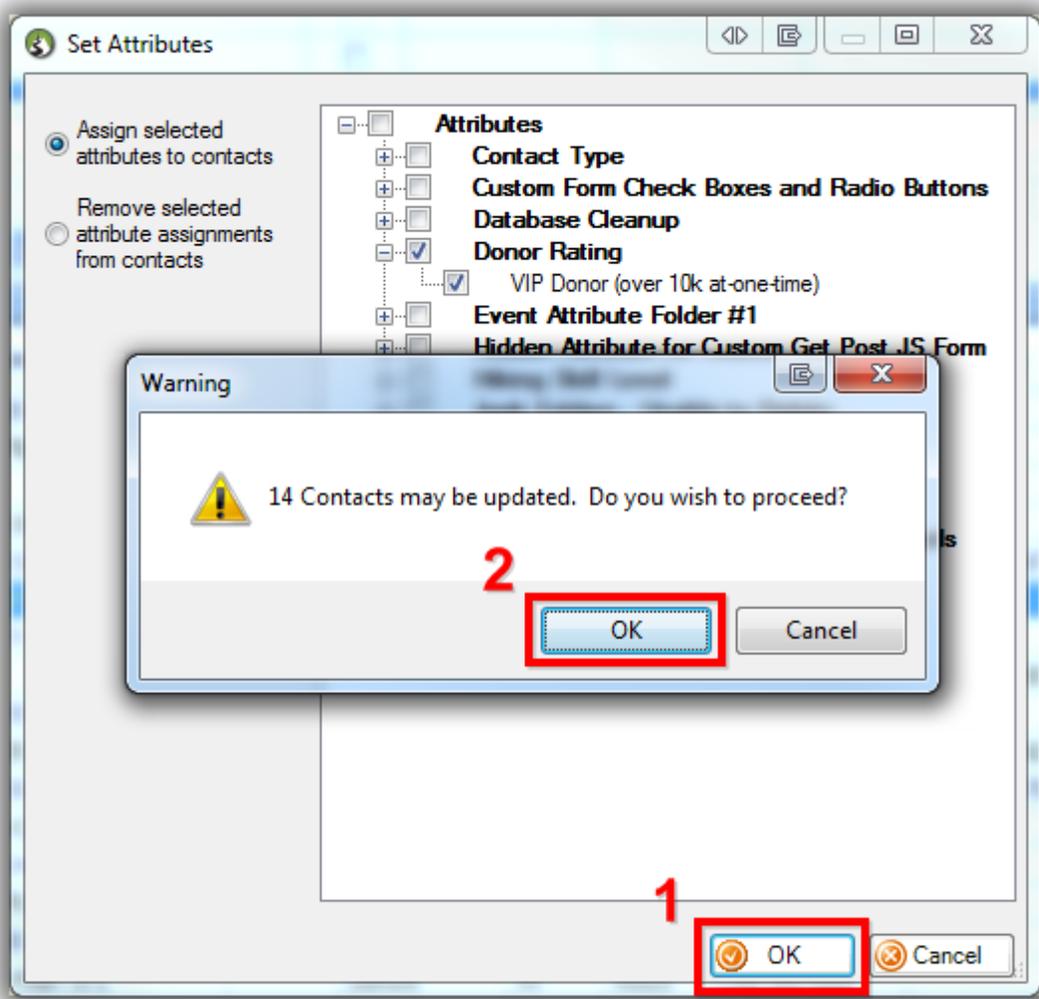
Incl	ID	Title	Last Name	First Name	MI	Address Type	Address	Address Line 2	City	State	Zip Code	Home Phone
<input checked="" type="checkbox"/>	9248			Cargill		Work	1000 Mcginty Rd		Minnetonka	MN	55305	
<input checked="" type="checkbox"/>	10089			Ford Foundation		Work	17760 Ballantrae Cir		Eden Prairie	MN	55347	

If necessary, expand the folder that contains the attribute you would like to assign en masse. *In this example I chose an attribute called “VIP Donor (over 10k at-one-time)”.*

The screenshot shows the TrailBlazer software interface. At the top, there is a toolbar with buttons for 'Search', 'Reset', 'New', and 'Include Other'. Below this is a menu bar with 'File', 'Edit', and 'Contacts'. The 'Edit' menu is open, and 'Set Attributes...' is highlighted with a red box and a red arrow pointing to it. Other options in the 'Edit' menu include 'Set', 'Fix', and 'Assign'. The main window displays a 'Marketing Notion' form with various fields for data entry. At the bottom, there is a table showing 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"/>	9248			Cargill		Work	1000 Mcginty Rd		Minnetonka	MN	55305	
<input checked="" type="checkbox"/>	10089			Ford Foundation		Work	17760 Ballantrae Cir		Eden Prairie	MN	55347	

Click **[OK]** to proceed. You'll be prompted with a warning message showing how many contacts are about to be updated, click **[OK]** again to begin the update.



When the process is complete (which could take a bit of time if you're updating 100k+ contact records) it will display the results.

To query for people tagged with your attribute, open a new contact list, check the corresponding attribute box under the Attribute tab, and click **[Search]**. *In my example I searched by the same attribute used in previous steps, which populates the 14 people who are now part of that category.*

The screenshot shows the TrailBlazer software interface with several key elements highlighted:

- 1**: A red arrow points to the **Contacts** link in the left-hand navigation menu.
- 2**: A red box highlights the **Search** button in the top application menu.
- 3**: A red arrow points to the **VIP Donor (over 10k at-one-time)** attribute in the attribute selection table.
- 4**: A red box highlights the **Attribute** tab in the top application menu.

The main window displays the **Attribute** selection interface with the following table:

Attribute	Yes	Date From
Custom Form Check Boxes and Radio Buttons	<input type="checkbox"/>	
Database Cleanup	<input type="checkbox"/>	
Donor Rating	<input checked="" type="checkbox"/>	
VIP Donor (over 10k at-one-time)	<input checked="" type="checkbox"/>	
Event Attribute Folder #1	<input type="checkbox"/>	
Hidden Attribute for Custom Get Post JS Form	<input type="checkbox"/>	

Below the attribute selection, the **Contacts [14 records found]** table is displayed:

Incl	ID	Title	Last Name	First Name	MI	Address Type	Address	City	State	Zip Code
<input checked="" type="checkbox"/>	9248			Carroll		Work	1000 Moginty Rd	Minnnetonka	MN	55305
<input checked="" type="checkbox"/>	10089			Ford Found...		Work	17760 Ballantrae Cir	Eden Prairie	MN	55347
<input checked="" type="checkbox"/>	9280			Towne Bank		Work	123 E Main	Norfolk	VA	23510
<input checked="" type="checkbox"/>	9471		Chaput	Victoria		Work	400 Selby Ave	St Paul	MN	55102
<input checked="" type="checkbox"/>	9260		Gore	Paul	M.	Home	1311 Cleveland Ave N	St Paul	MN	55108
<input checked="" type="checkbox"/>	9263		Green	Lynn						
<input checked="" type="checkbox"/>	9429		Heneqar	Takara	I	Home	2610 Emerson Ave	Minneapolis	MN	55408
<input checked="" type="checkbox"/>	9253		Keohane	Kaaren	E...	Home	1735 Orchid Dr N	North Mankato	MN	56003
<input checked="" type="checkbox"/>	12796	Mr.	Kristenson	Joel		Home	9110 Golden Valley Rd	Golden Valley	MN	55427
<input checked="" type="checkbox"/>	10964		McSpadden	Laur	M.	Home	604 College Ave	New Paris	IN	46553
<input checked="" type="checkbox"/>	9378	Ms.	Miner	Kris	A...	Home	876 Helen St	River Falls	WI	54022
<input checked="" type="checkbox"/>	9473		Walters	Barbara		Home	6876 Monroe St	Minneapolis	MN	55432
<input checked="" type="checkbox"/>	12823		Williams	Susanna		Home	3000 4th St NE	Renton	WA	98056
<input checked="" type="checkbox"/>	9468	Ms.	Withey	Jessica		Work	424 Main St E	Edmore	MI	48829

You're now finished with these steps. The related resources below discuss similar features in the program, there's also a link to an article on rolling back transactions if something goes awry during your mass updates.

 **TIP:** There are a lot of other mass updates you can perform from the **Edit** menu on the different lists throughout the system i.e. Addresses, Households, and the Voters/Donors. Another popular application of this utility would be to ***remove*** attributes from a particular list of contacts.



Trail Blazer™

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

Related Resources

Article: [How to Set an Attribute for All Members of a Household En Masse](#)

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

Article: [Adding Log Notes, Mass Log Notes, and Reminders](#)

Article: [Rollback](#)

Video: [Attributes – Adding New](#)

Video: [Attributes – Assign En Masse](#)

Trail Blazer Live Support

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