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**Author:** Joel Kristenson

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## Overview


This KB walks through the steps to delete contact (voter/donor/other) records one at a time and a list of records.

## Outline

**#1** Delete a Single Contact Record

**#2** Delete a List of Contact Records

**#3** Related Resources

 **Tip:** It's pretty rare that we recommend deleting records. The majority of the time you'll either merge duplicates together or "hide" records using the [Not Attribute](#). *(Link to this KB once it's published)*

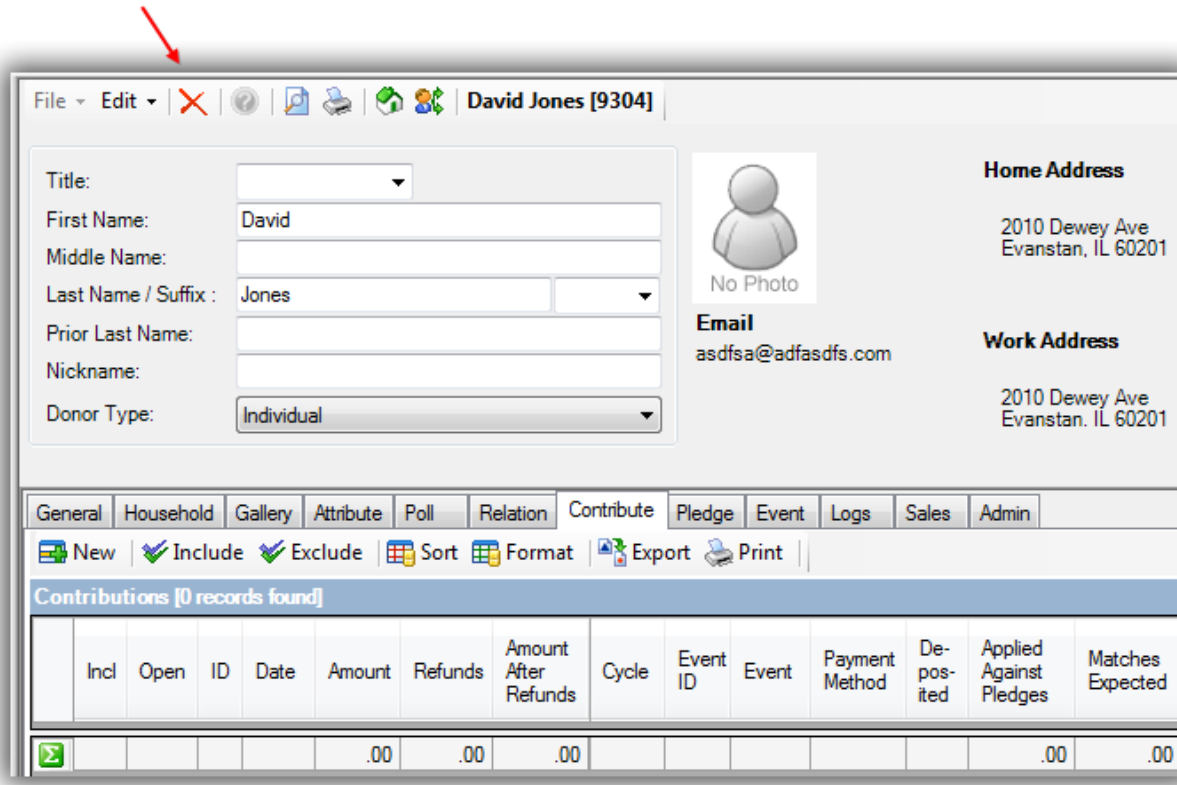
**IMPORTANT!** The system will prevent you from deleting a contact record if a **contribution, pledge, or Logon Session** is present. You'll first need to delete the contribution and then delete the record. Do this only with a high degree of discretion - if something goes wrong you may be able to [rollback](#) the session.

## #1 Delete a Single Contact Record

Open up the record you want to delete from your contact list. *In this example I used a sample donor database and opened **David Jones'** record.*

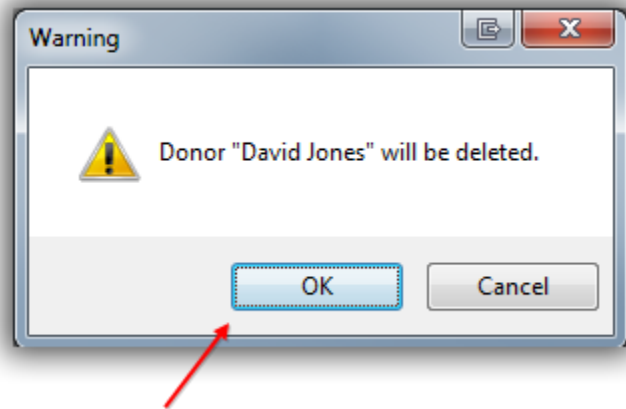
The screenshot shows the TrailBlazer software interface. On the left is the 'Application Menu' with a 'Tasks' list. The 'Donors' menu item is highlighted with a red arrow labeled '1'. The main window shows a 'Search' button with a red arrow labeled '3' pointing to it. Below the search bar is a form for entering donor information. A red arrow labeled '2' points to the 'Last Name' dropdown menu, which contains the text 'Jones'. Below the form is a table of donors. A red arrow labeled '4' points to the 'First Name' field in the first row of the table, which contains the text 'David'. The table has columns for 'Incl', 'ID', 'Title', 'Last Name', 'First Name', 'MI', 'Address Type', 'Address', 'City', and 'State'. The first row has values: [checked], 9304, [blank], Jones, David, [blank], Work, 2010 Dewey Ave, Evanston, IL.

From within the record click the **Red [X]** at the top.

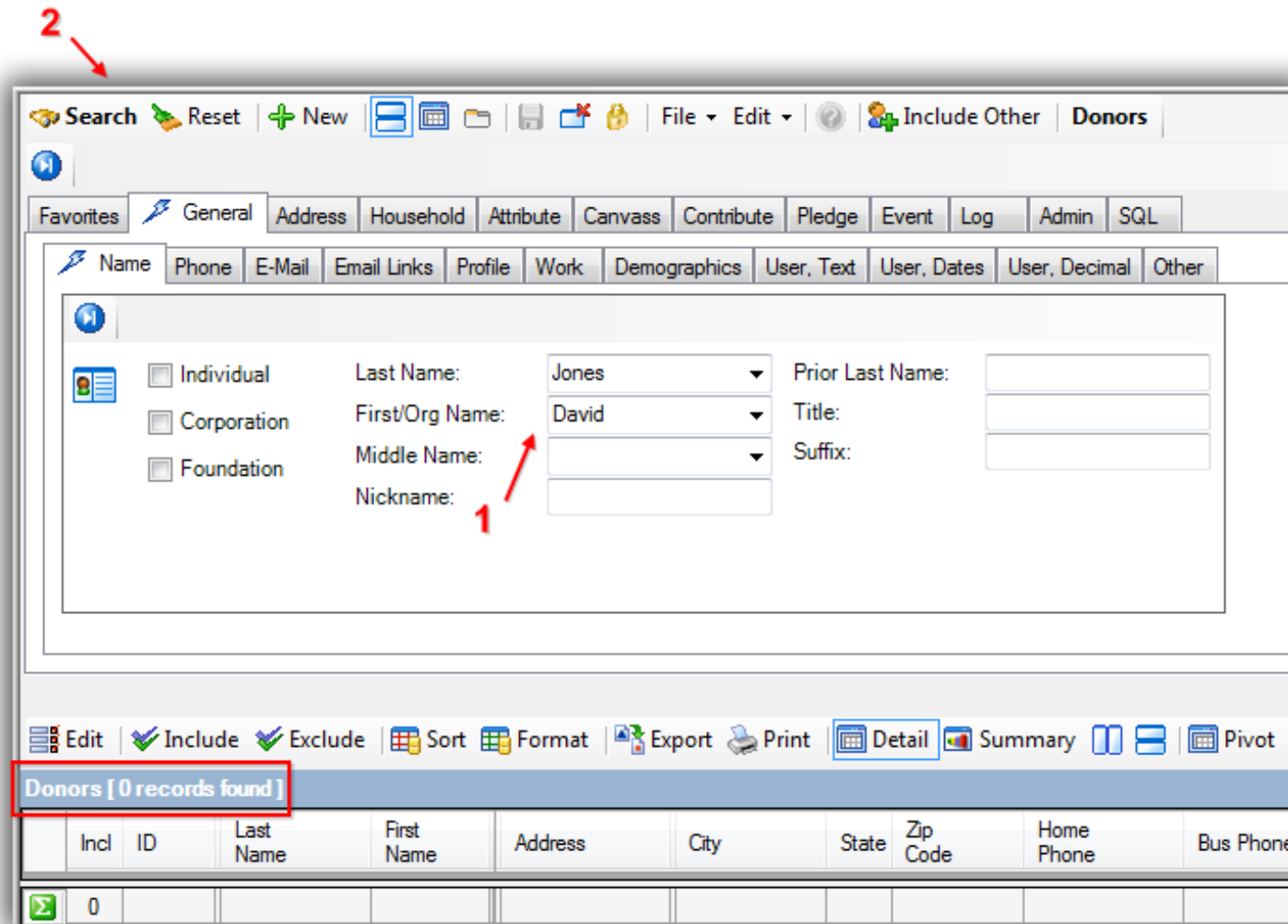


The screenshot shows the TrailBlazer software interface for a contact record. At the top, there is a menu bar with 'File', 'Edit', and a red 'X' icon. Below the menu bar, the contact's name 'David Jones [9304]' is displayed. The main area contains several sections: a form for personal information (Title, First Name: David, Middle Name, Last Name / Suffix: Jones, Prior Last Name, Nickname, Donor Type: Individual), a 'No Photo' placeholder, an 'Email' field (asdfsa@adfasdfs.com), and 'Home Address' and 'Work Address' fields (both 2010 Dewey Ave, Evanston, IL 60201). Below these fields is a tabbed interface with tabs for 'General', 'Household', 'Gallery', 'Attribute', 'Poll', 'Relation', 'Contribute', 'Pledge', 'Event', 'Logs', 'Sales', and 'Admin'. Under the 'Contribute' tab, there are icons for 'New', 'Include', 'Exclude', 'Sort', 'Format', 'Export', and 'Print'. A table titled 'Contributions [0 records found]' is displayed below the icons. The table has columns for 'Incl', 'Open', 'ID', 'Date', 'Amount', 'Refunds', 'Amount After Refunds', 'Cycle', 'Event ID', 'Event', 'Payment Method', 'De-posit-ed', 'Applied Against Pledges', and 'Matches Expected'. The table contains one row with values: .00, .00, .00, and .00.

Trail Blazer will prompt you with a warning. Click **[OK]** to proceed.



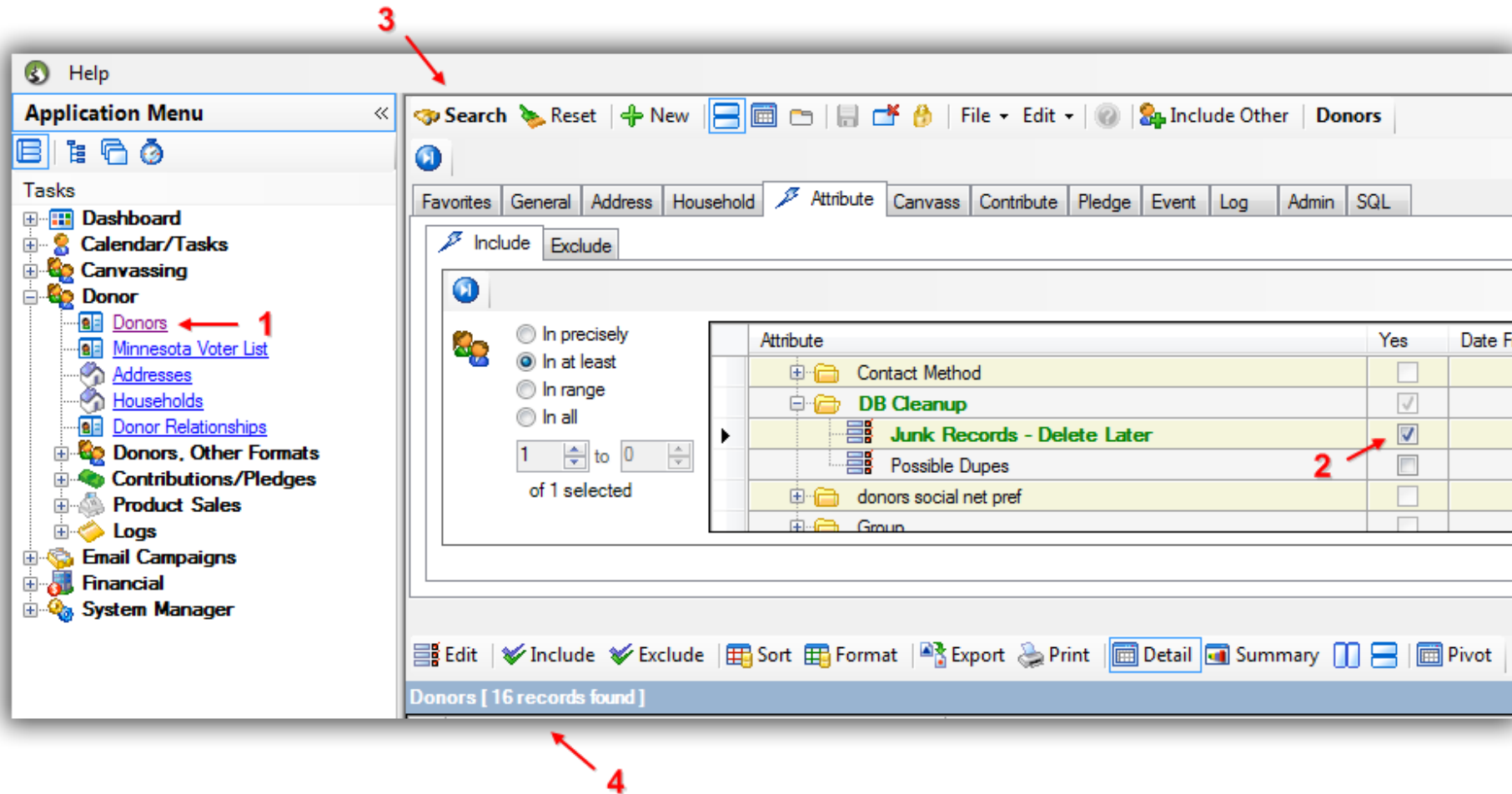
It may take a minute or two for the system to finish processing. Once complete you'll be taken back to your contact list and notice that the record has been purged.



The next section covers deleting a list of contact records at once. The same rules apply where any **pledge** or **contribution** that're present will prevent you from deleting those records.

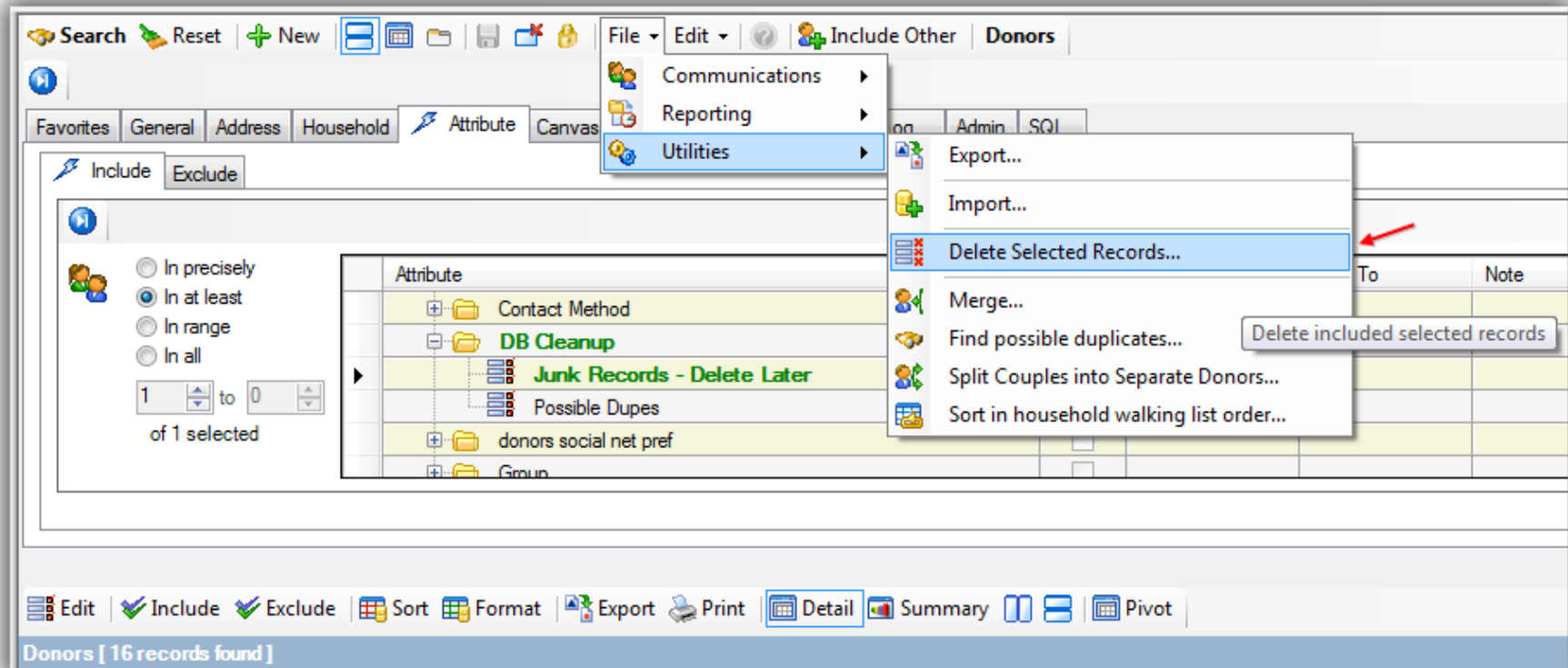
## #2 Delete a List of Contact Records

Query for the list of records you want to delete. *In my example I pulled up a list of records that had an attributed called **Junk Records – Delete Later** giving me a count of 16 people.*

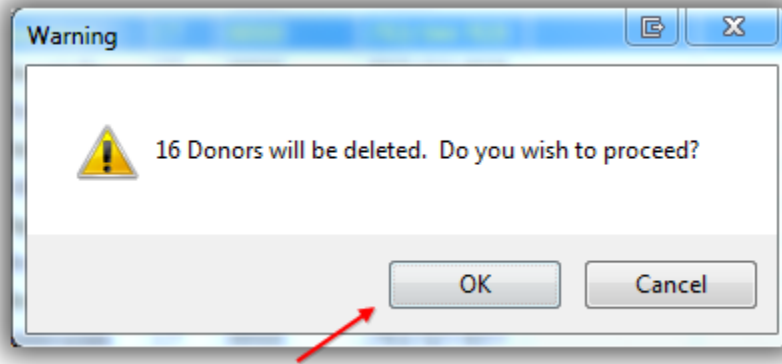


Click [File] > Utilities > Delete Selected Records...

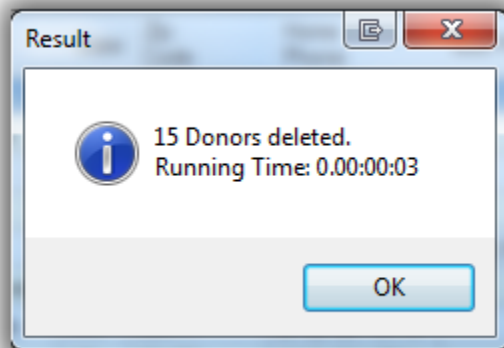




You'll be prompted with a warning displaying how many records are about to be deleted. Click **[OK]** to proceed (*with caution*).



Trail Blazer will display the progress status and a confirmation with the results. *In my example 15 records were deleted because 1 was a past database user which cannot purge if audit trail is present.*



Click **[OK]**.

Click **[Search]** to refresh the list.

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The screenshot shows the TrailBlazer search interface. At the top, there are search and filter options. Below that, a table lists various attributes with checkboxes for inclusion. The 'Junk Records - Delete Later' attribute is checked. At the bottom, a status bar indicates 'Donors [ 1 records found ]' and a table of donor records is visible.

Attribute	Yes	Date From
Contact Method	<input type="checkbox"/>	
DB Cleanup	<input checked="" type="checkbox"/>	
Junk Records - Delete Later	<input checked="" type="checkbox"/>	
Possible Dupes	<input type="checkbox"/>	
donors social net pref	<input type="checkbox"/>	
Group	<input type="checkbox"/>	

**15 records were deleted. One was not because it had past logon sessions.**

Some of the resources below are useful for managing duplicate records, and how to utilize the NOT attribute to archive a record vs. deleting the record.



Trail Blazer™

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

## #3 Related Resources

**Article:** How to Use the NOT Attribute and Query for Records Tagged with It *(Link after KB's published)*

**Article:** [Delete an Invoice/Payment](#)

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

**Video:** [How to Manage Duplicates](#)

## Trail Blazer Live Support

📞 Phone: 1-866-909-8700

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

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