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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)*
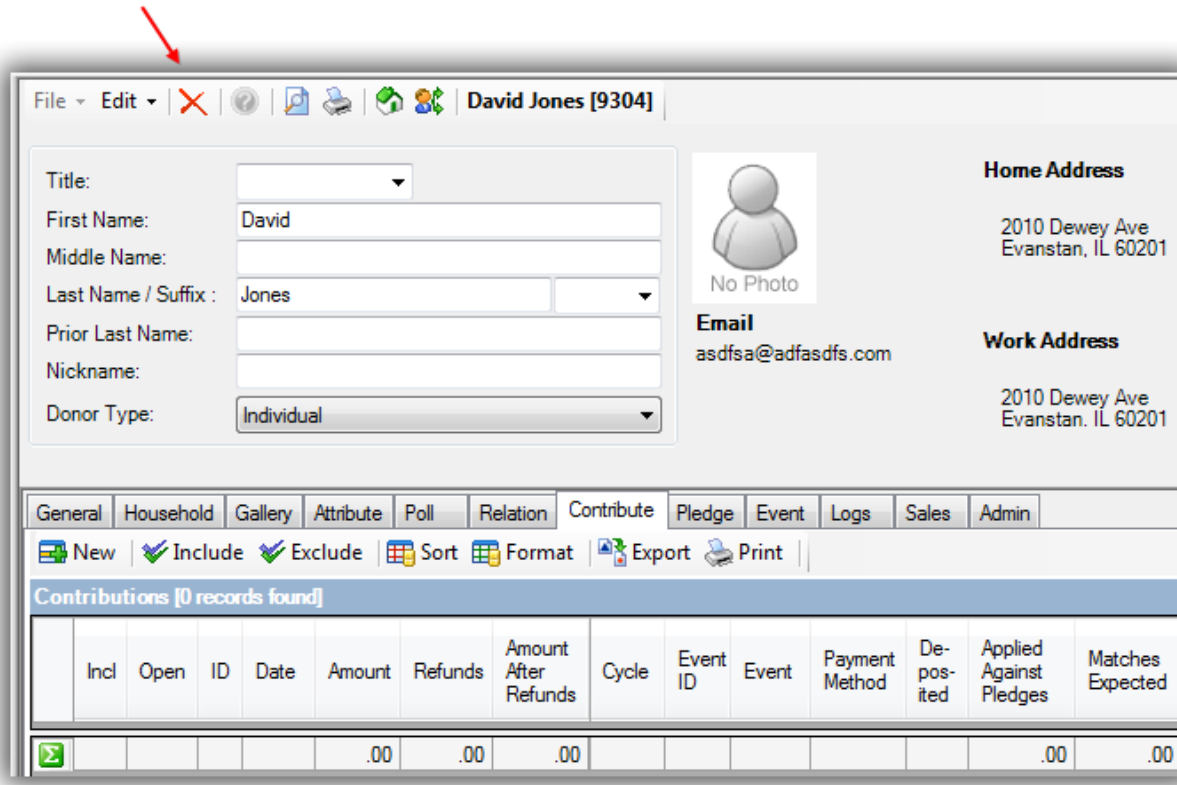
IMPORTANT! The system will prevent you from deleting a contact record if a **contribution, pledge,** or **Logon Session** is present. You'll first need to delete the contribution and then delete the record. Do this <u>only</u> with a high degree of discretion - if something goes wrong you may be able 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.*
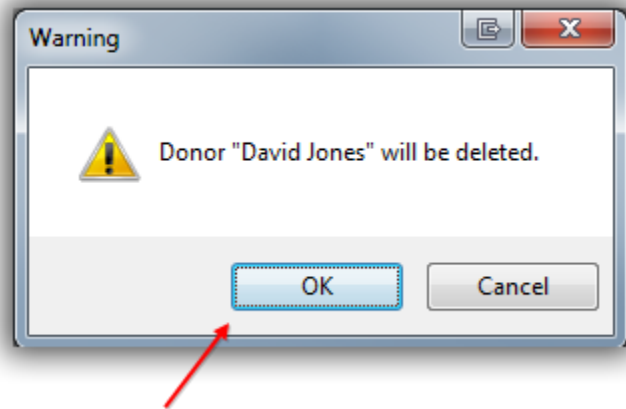
From within the record click the Red [X] at the top.

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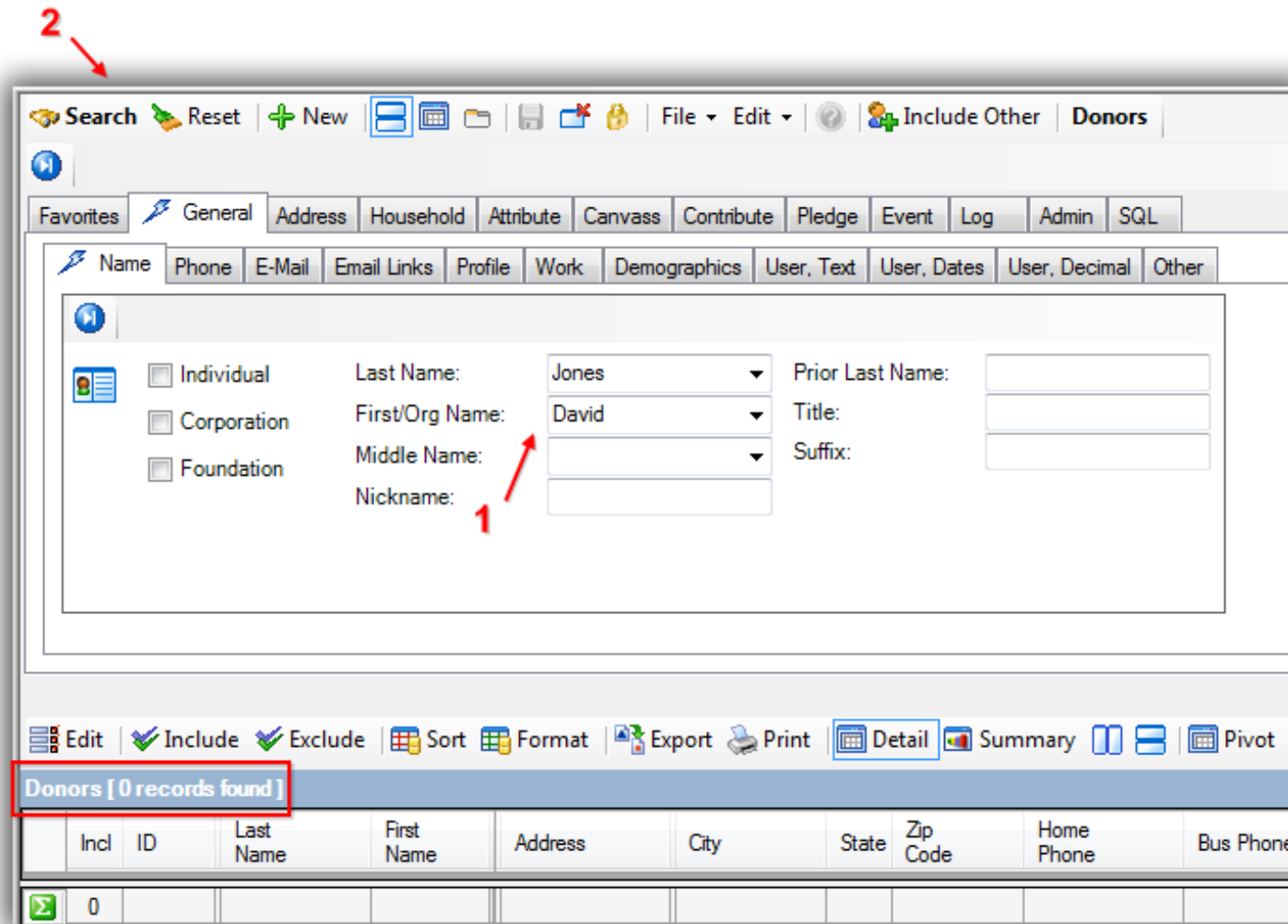
The next section covers deleting a list of contact records at once. The same rules apply where any **pledge** or **contribution** that're present will prevent you from deleting those records.

#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.*
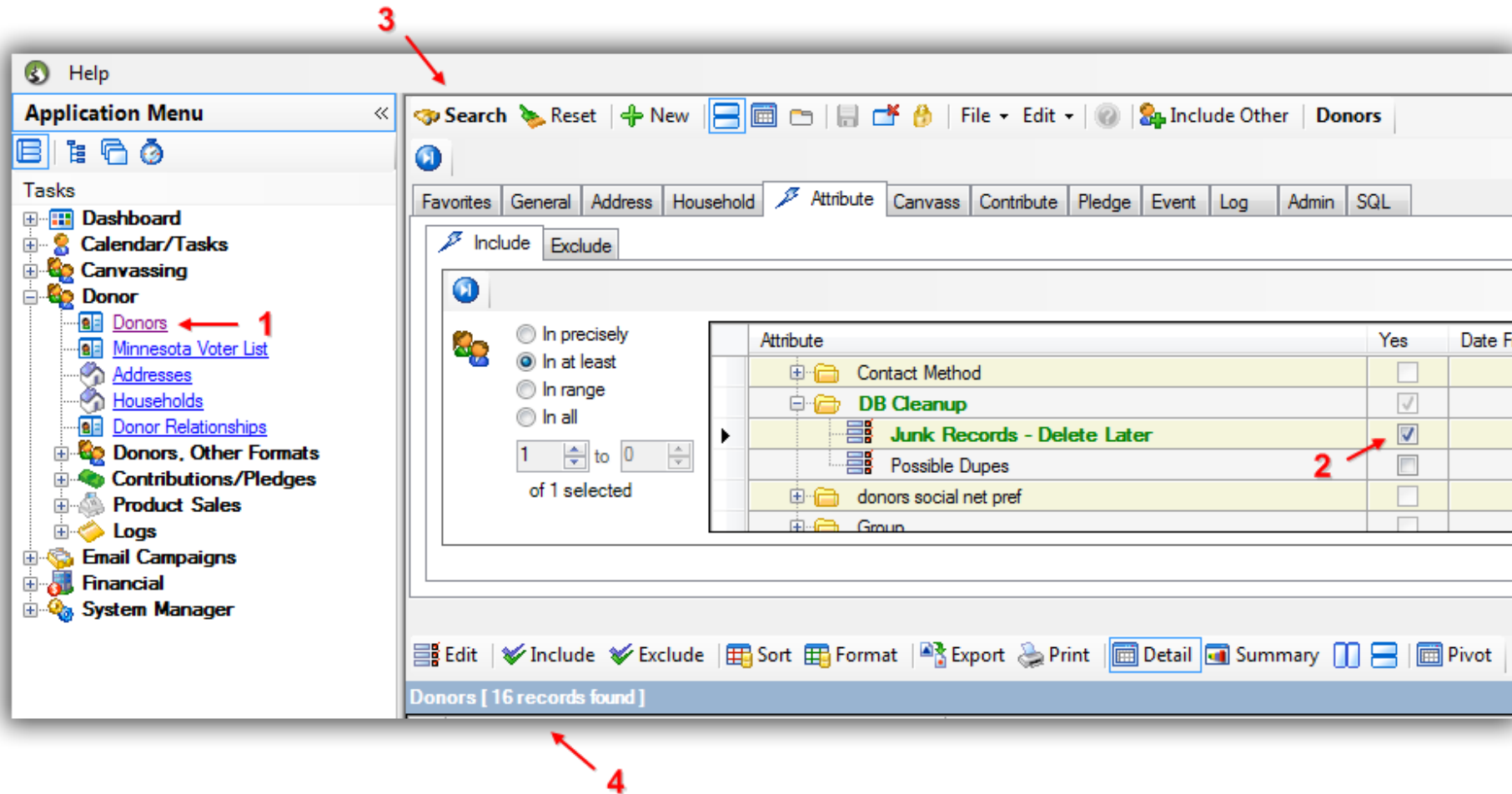
Click **[File]** > **Utilities** > **Delete Selected Records…**
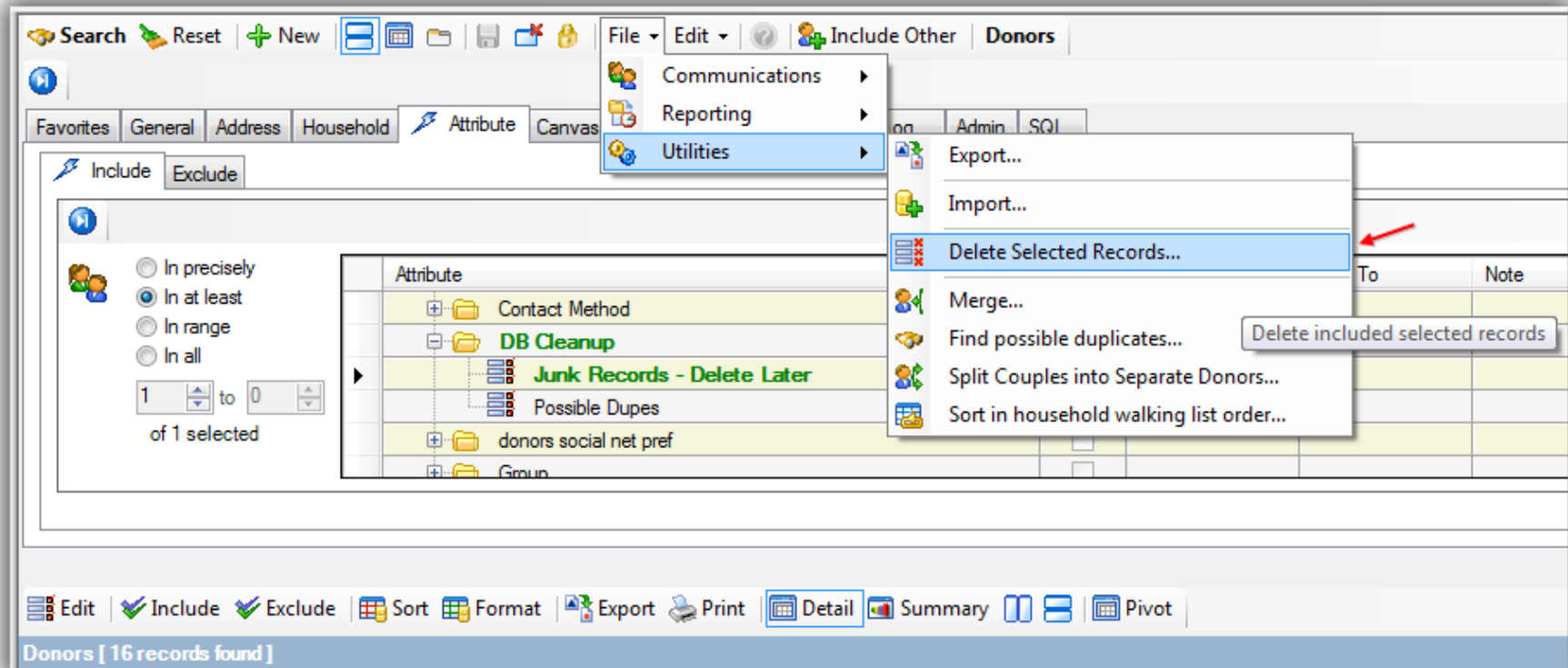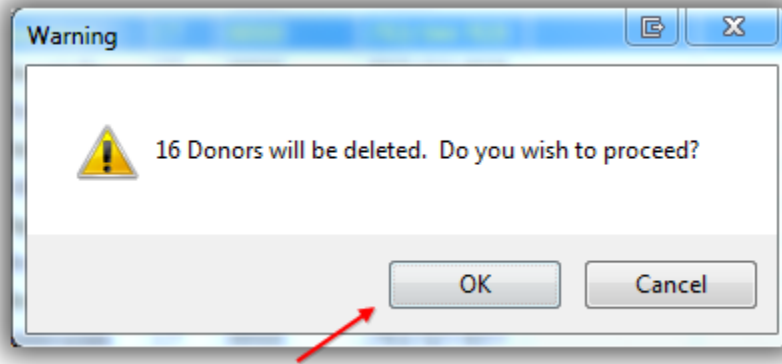
You'll be prompted with a warning displaying how many records are about to be deleted. Click **[OK]** to proceed (*with caution*).

Warning

⚠ 16 Donors will be deleted. Do you wish to proceed?

OK   Cancel

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.*

Result

ⓘ 15 Donors deleted.
Running Time: 0.00:00:03

OK
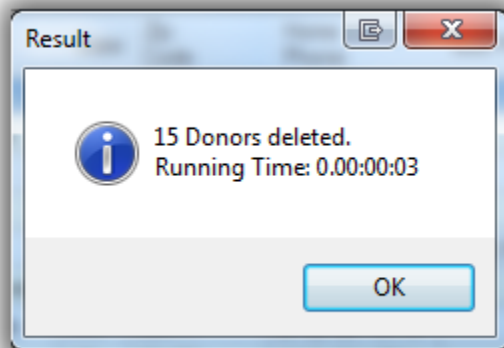
Click **[OK]**.

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

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

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