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Overview

This article walks through the steps to record **matching contributions** in **Trail Blazer**. The process entails:

- Setting up a company/organization record as a 'matching donor' (along with the percentage that they're willing to match)
- Entering the original gift and flagging it as needing a match (or multiple matches)
- Viewing a report of unfulfilled matching gifts
- Recording the matching gifts as they come in

Tip: Use the **Ctrl+F** hot key to jump to different sections of this article (example: "**#1**", "**#2**" or "**Related Resources**". Also, <u>click here</u> to watch a **video** on this topic.

<u>Outline</u>



#1 Setup a Company/Organization as a Matching Donor & Enter the Percentage they're willing to Match

- **#2** Recording a Donation and Flagging it as needing a Matching Gift
- #3 Viewing a Report of Unfulfilled Matching Gifts & Recording them as they come in

#4 Related Resources

#1 – Setup a Company/Organization as a Matching Donor & Enter the Percentage they're willing to Match

Navigate to the Contacts (Donors/Voters) list and run a <u>search query</u> for the company/organization you want to **setup as a matching donor**, and **open** their record.



2. Build and run your search query for the company/organization you want to setup as a matching donor.

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 Communications Financial System Manager 	ID First Name Street Street 2 City State Zip Code Bus Phone ID First Name Street Street 2 City State Zip Code Bus Phone ID First Name 6500 City W Pkwy #102 Eden Prairie MN 55344 (952) 931-1220

3. Click on the name hyperlink to open their contact record. KNOWLEDGE BASE www.trailblz.com/kb



Navigate to the General > Other tab, check the box for 'This organization (or individual) has agreed to match contributions received from others', and enter the percentage they're willing to match. Click [Save and Close] once you're finished.



Matching Contributions – Setup Companies/Orgs as a Matching Donor, View Unfulfilled Matching Gifts and Record the Matching Gifts as they Come In

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Last Name (opt) Prior Last Name			Email	Work Address	
(ont) Nickname (opt)			info@hormel-foods.com	6500 City W Pkwy	
Contact Type:	Corporation	•		#102 Eden Prairie. MN 55344	
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Repeat these steps for all donors who are willing to provide a matching gift. The next section shows how to record the original donation and flag it as needing a matching gift.

#2 – Recording a Donation and Flagging it as needing a Matching Gift

Navigate to the **Contacts (Donors/Voters)** list, run a search for the donor who provided the original <u>donation</u>, and **open** their record.



2 - run a search for the donor who provided the original donation.

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3 - open their record to record the original donation.

Navigate to the **Contribute** tab and click [+ New].



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	2 9				5,325.00	.00	5,325.00					0	.00	.00	.00	.00		

Fill out the contribution form under the General tab, and click [Save] (make sure to keep this form open for the next step).



Fill out the donation form under the General tab and click [Save].

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Navigate to the **Match** tab and click [+ New].



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Select the matching donor from the drop-down list (covered in section No1) and click **[OK]**. You can adjust the matching **amount** if necessary.



Matching Contributions – Setup Companies/Orgs as a Matching Donor, View Unfulfilled Matching Gifts and Record the Matching Gifts as they Come In

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		N Select the matching donor.
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If necessary you can adjust the matching amount. This will



Repeat this step until all the expected matching gifts have been recorded, and then click [OK].



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Click **[Refresh]** and the data will update in the donor's record. There's a column that will display how much (in total) is expected to be matched. *You may need to widen out the column dividers in order to view this if it isn't showing by default.*



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The next section covers the final steps of viewing un-paid matching gifts, and how to record the gifts as they come in.



<u>#3 – Viewing a Report of Unfulfilled Matching Gifts & Recording them as they come in</u>

Under the Application Menu navigate to the Contribution Matches list.







Click **[Search]** to populate all **unpaid** matching gifts. In my example I had 74 and I sorted by the ID in descending order to put the most recent ones at the top.



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Here you can view all the details such as the **amount expected** and **amount received**.

When a donation comes in from a matching donor, click on the **donors name hyperlink** to open their record. *In my example I used Hormel Foods. This step is VERY important, the 'amount received' for a matching gift will *not* update unless you record the donation from the matching donor.*



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Navigate to the **Contribute** tab and click **[+ New]**.

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Fill out the donation form and then [Save and Close]. It's not a bad idea to record a note that the gift is for a matching contribution, my example is below.



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The final step will be to **double-click** in the **green** cell for **Amount Received**, **enter the amount** that the matching donor gave, and **[Save]** as you go. *My example is below where I recorded the full \$50 amount for Hormel Foods*.



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Click [Search] as you go and the results count will drop as matching gifts are fulfilled.



Click [Search] to refresh the results and the results count will drop as matching gifts are fulfilled.

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The related resources below link to a variety of articles and videos similar to this topic.



YouTube Channel

- Knowledge Base Articles

- 3rd Party Resources



Related Resources

Article: How to Track Soft Credits using Contribution Notifications – ONLY for Nonprofit Customers Article: Recording Non-Monetary (In-Kind) Contributions and Creating New Non-Monetary Types Article: Enter Contributions Article: Entering Pledges and Applying Payments to Outstanding Pledges Article: Tax Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage Article: How to Remove an 'Event' from the Drop-Down List when Entering Donations Video: Getting Started 103 – Adding a Contact Record Video: Getting Started 106a – Entering Contributions (NON PROFIT ONLY) Video: Write Letter – Edit Letter after Mail Merge Video: Getting Started 107 – Writing Contribution Thank You Letters Video: Year End Tax Letter

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* 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.