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

Author: Kristenson, Joel
Last Updated: 2018-05-04

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, click here to watch a **video** on this topic.

Outline

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

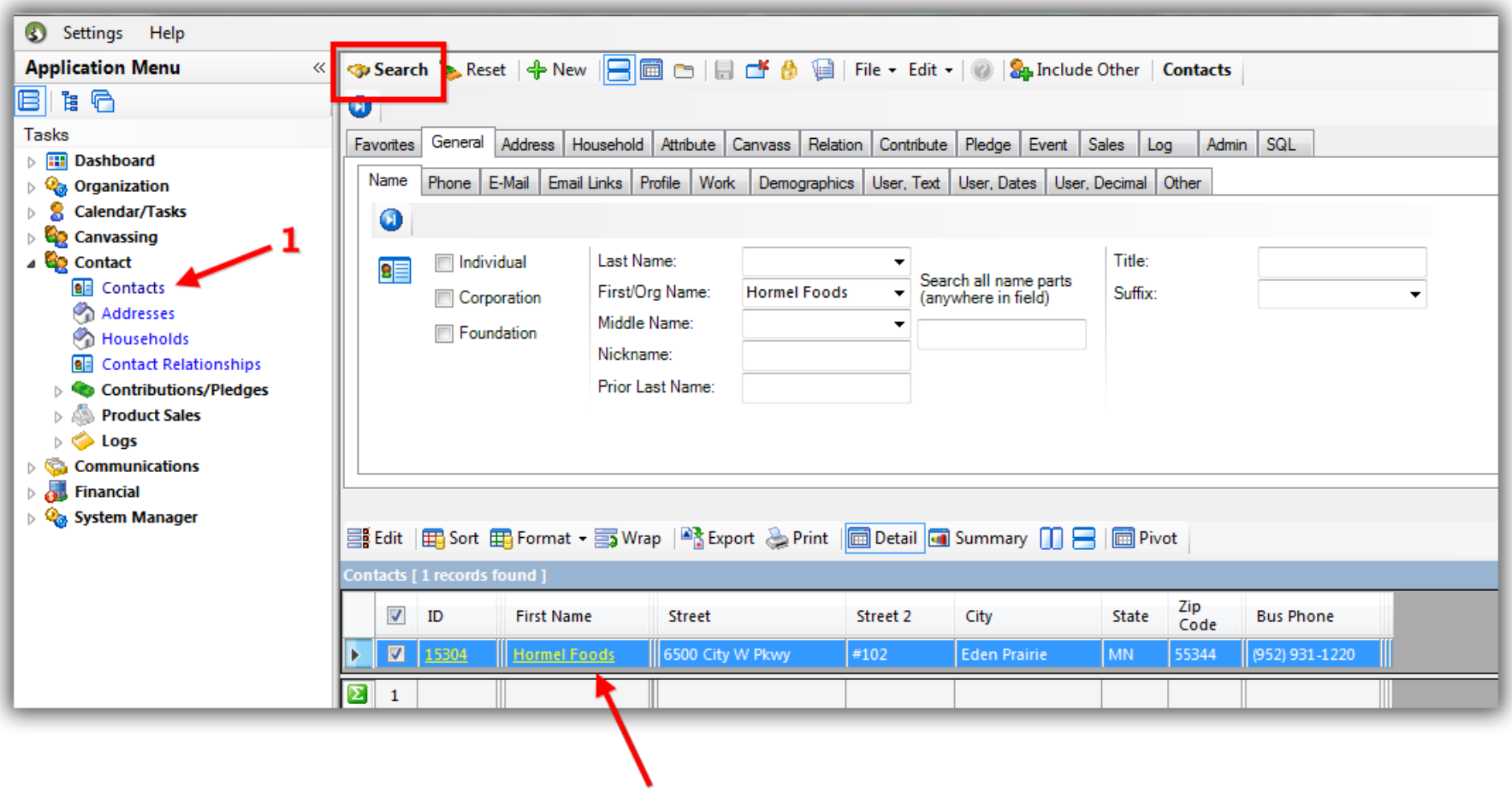
#1 Setup a Company/Organization as a Matching Donor & Enter the Percentage they're willing to Match
#2 Recording a Donation and Flagging it as needing a Matching Gift
#3 Viewing a Report of Unfulfilled Matching Gifts & Recording them as they come in
#4 Related Resources

#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 search query for the company/organization you want to **setup as a matching donor**, and **open** their record.

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

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

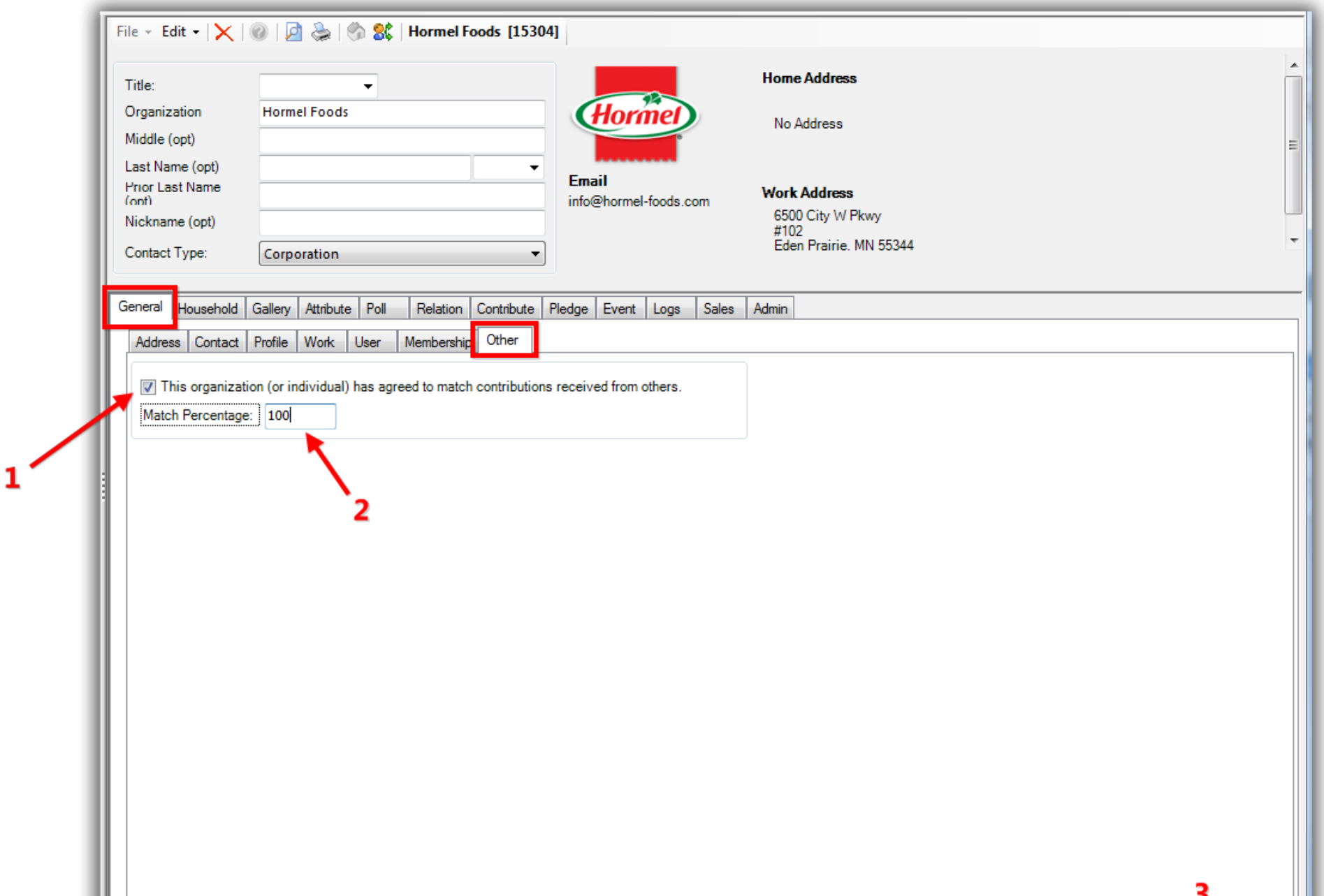


3. Click on the name hyperlink to open their contact record.

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

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

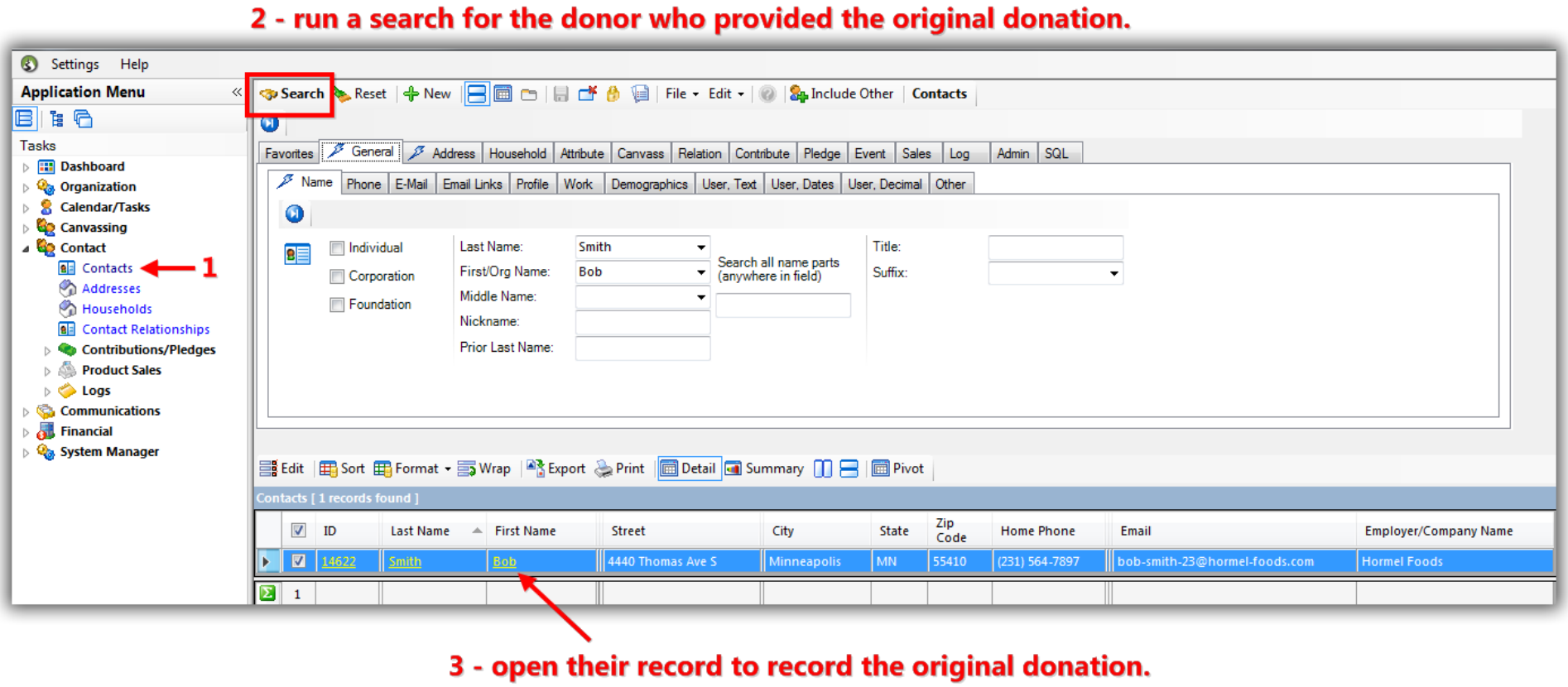


Repeat these steps for all donors who are willing to provide a matching gift. The next section shows how to record the original donation and flag it as needing a matching gift.

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

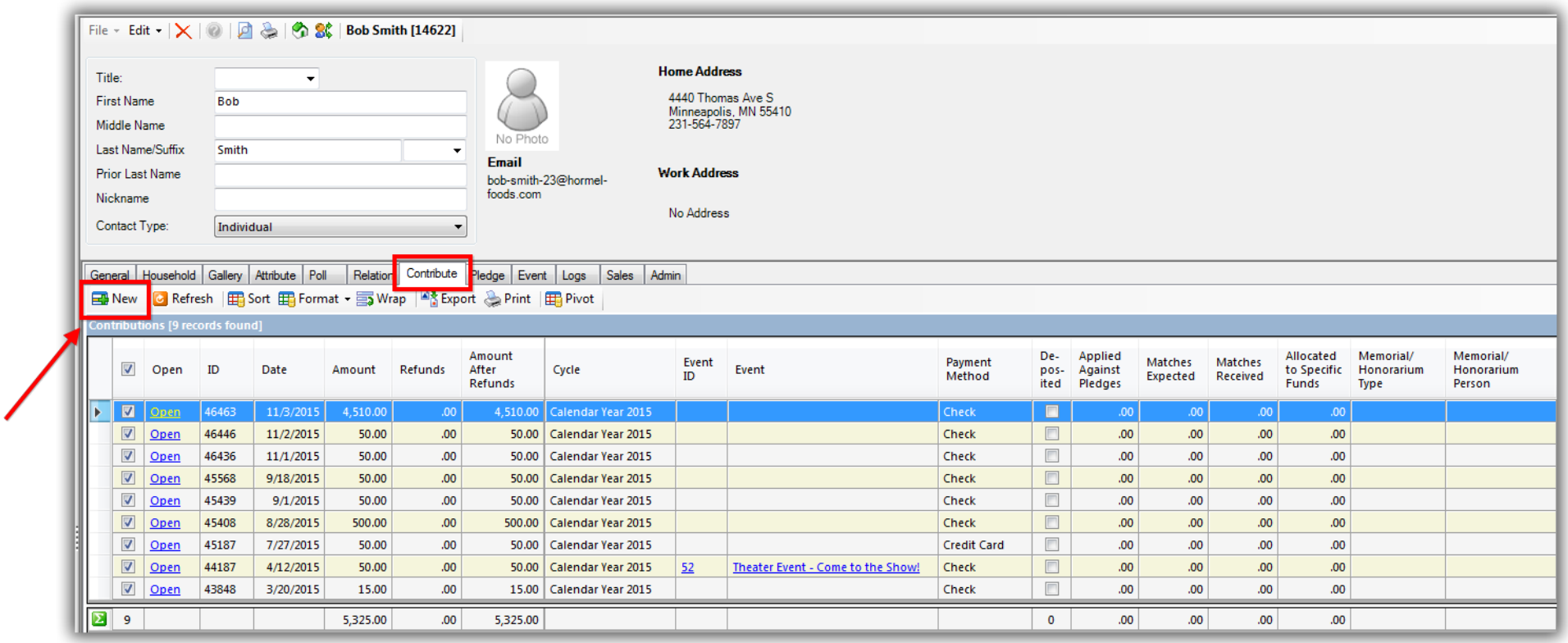
Navigate to the **Contacts (Donors/Voters)** list, run a search for the donor who provided the original donation, and **open** their record.

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



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

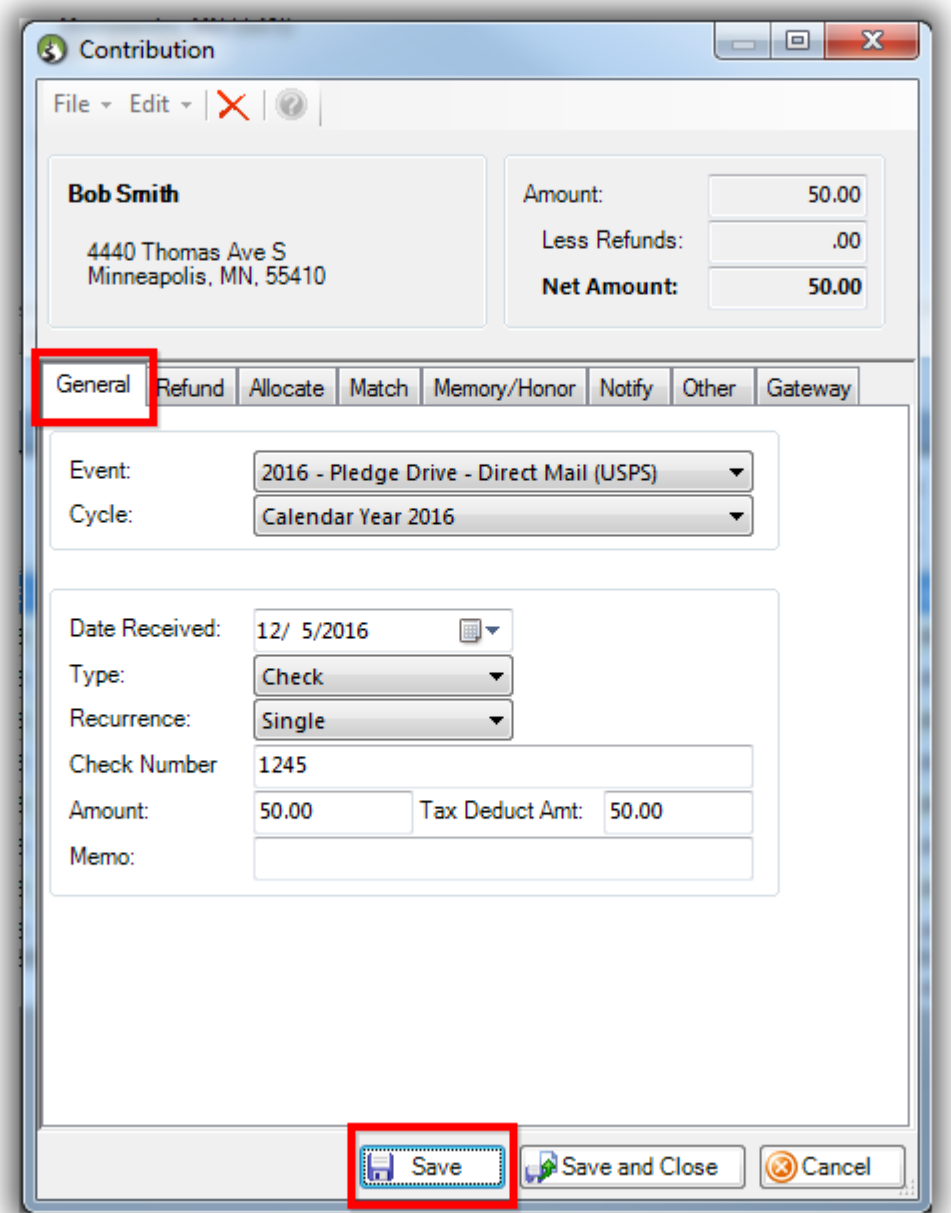
Matching Contributions – Setup Companies/Orgs as a Matching Donor, View Unfulfilled Matching Gifts and Record the Matching Gifts as they Come In



Open	ID	Date	Amount	Refunds	Amount After Refunds	Cycle	Event ID	Event	Payment Method	De-posited	Applied Against Pledges	Matches Expected	Matches Received	Allocated to Specific Funds	Memorial/ Honorarium Type	Memorial/ Honorarium Person
Open	46463	11/3/2015	4,510.00	.00	4,510.00	Calendar Year 2015			Check		.00	.00	.00	.00		
Open	46446	11/2/2015	50.00	.00	50.00	Calendar Year 2015			Check		.00	.00	.00	.00		
Open	46436	11/1/2015	50.00	.00	50.00	Calendar Year 2015			Check		.00	.00	.00	.00		
Open	45568	9/18/2015	50.00	.00	50.00	Calendar Year 2015			Check		.00	.00	.00	.00		
Open	45439	9/1/2015	50.00	.00	50.00	Calendar Year 2015			Check		.00	.00	.00	.00		
Open	45408	8/28/2015	500.00	.00	500.00	Calendar Year 2015			Check		.00	.00	.00	.00		
Open	45187	7/27/2015	50.00	.00	50.00	Calendar Year 2015			Credit Card		.00	.00	.00	.00		
Open	44187	4/12/2015	50.00	.00	50.00	Calendar Year 2015	52	Theater Event - Come to the Show!	Check		.00	.00	.00	.00		
Open	43848	3/20/2015	15.00	.00	15.00	Calendar Year 2015			Check		.00	.00	.00	.00		
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).

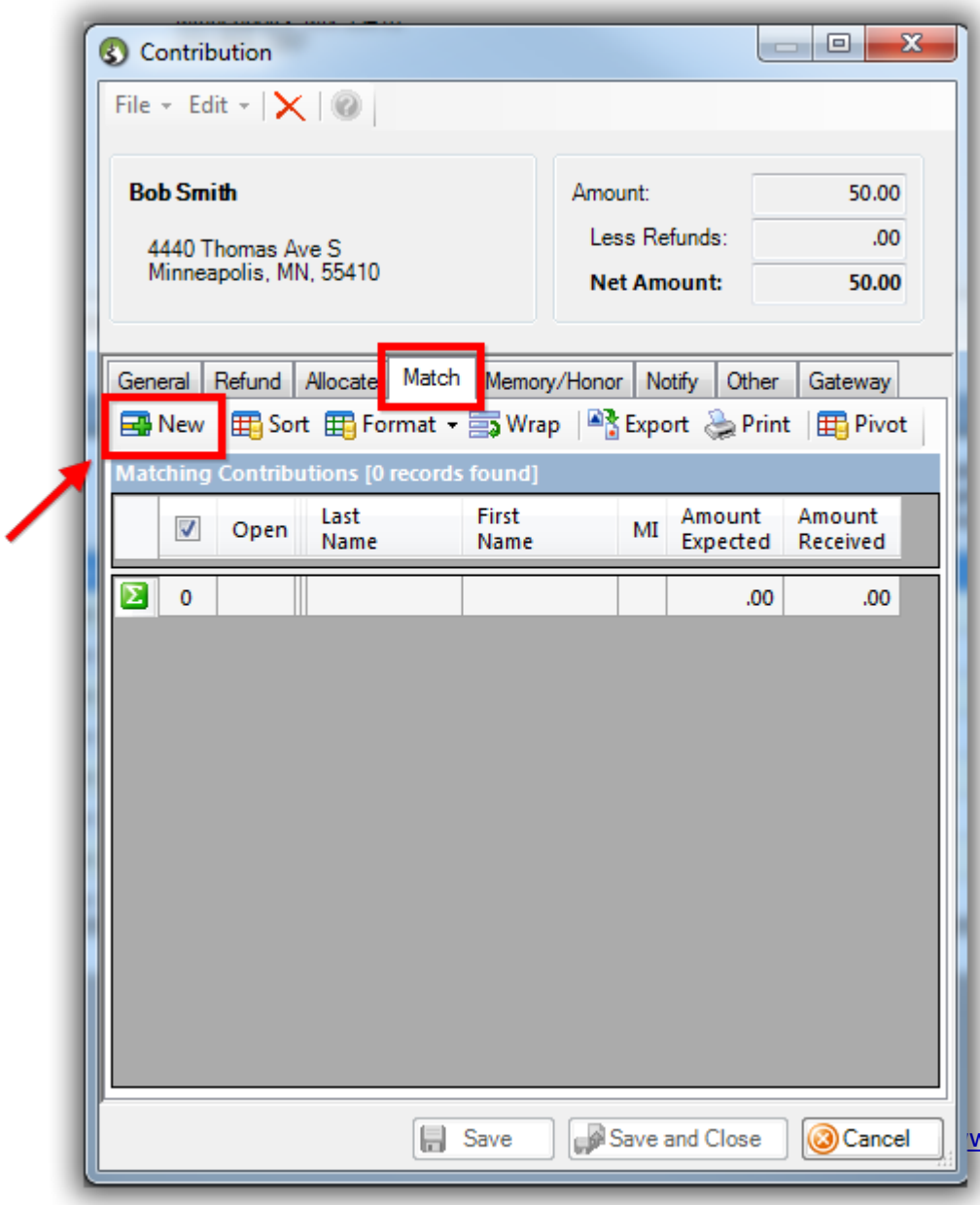
Fill out the donation form under the General tab and click [Save].



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

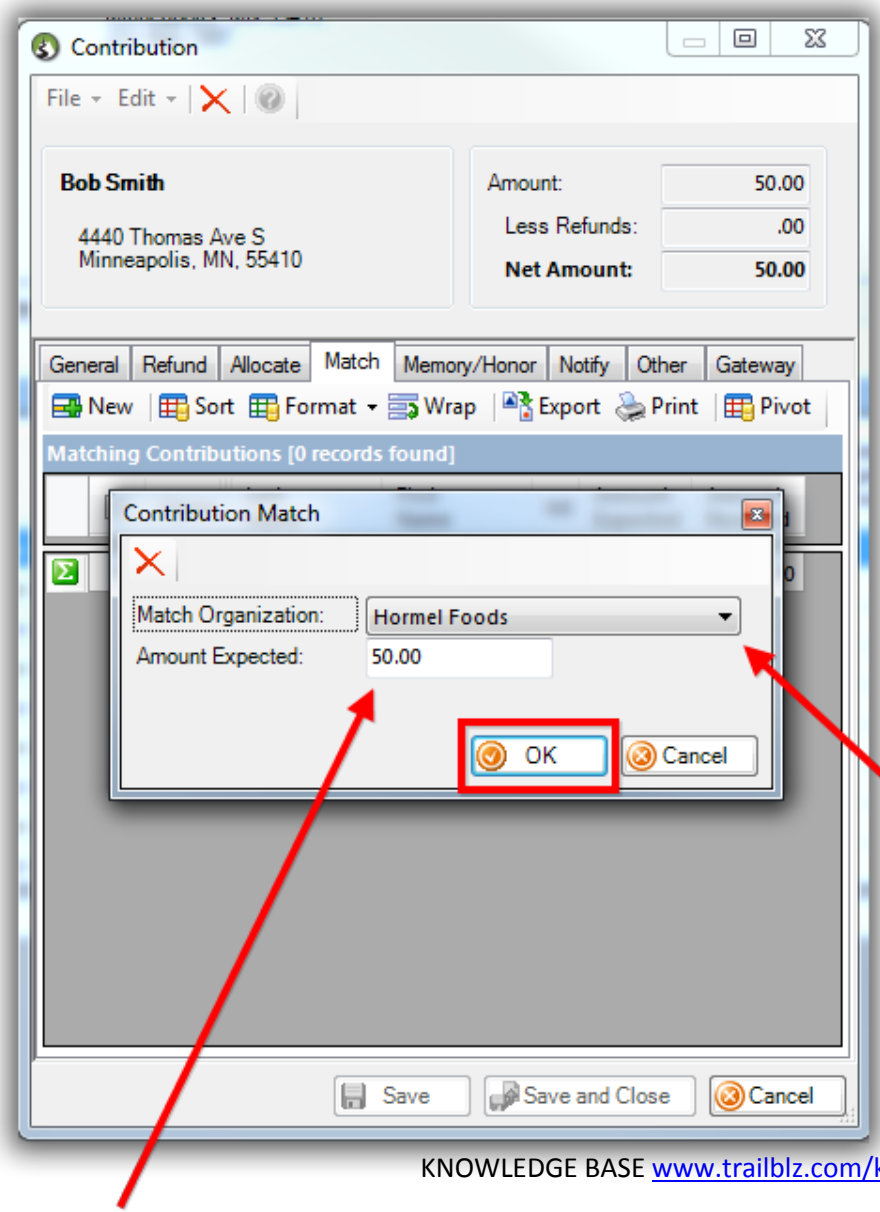
Navigate to the **Match** tab and click **[+ New]**.

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



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

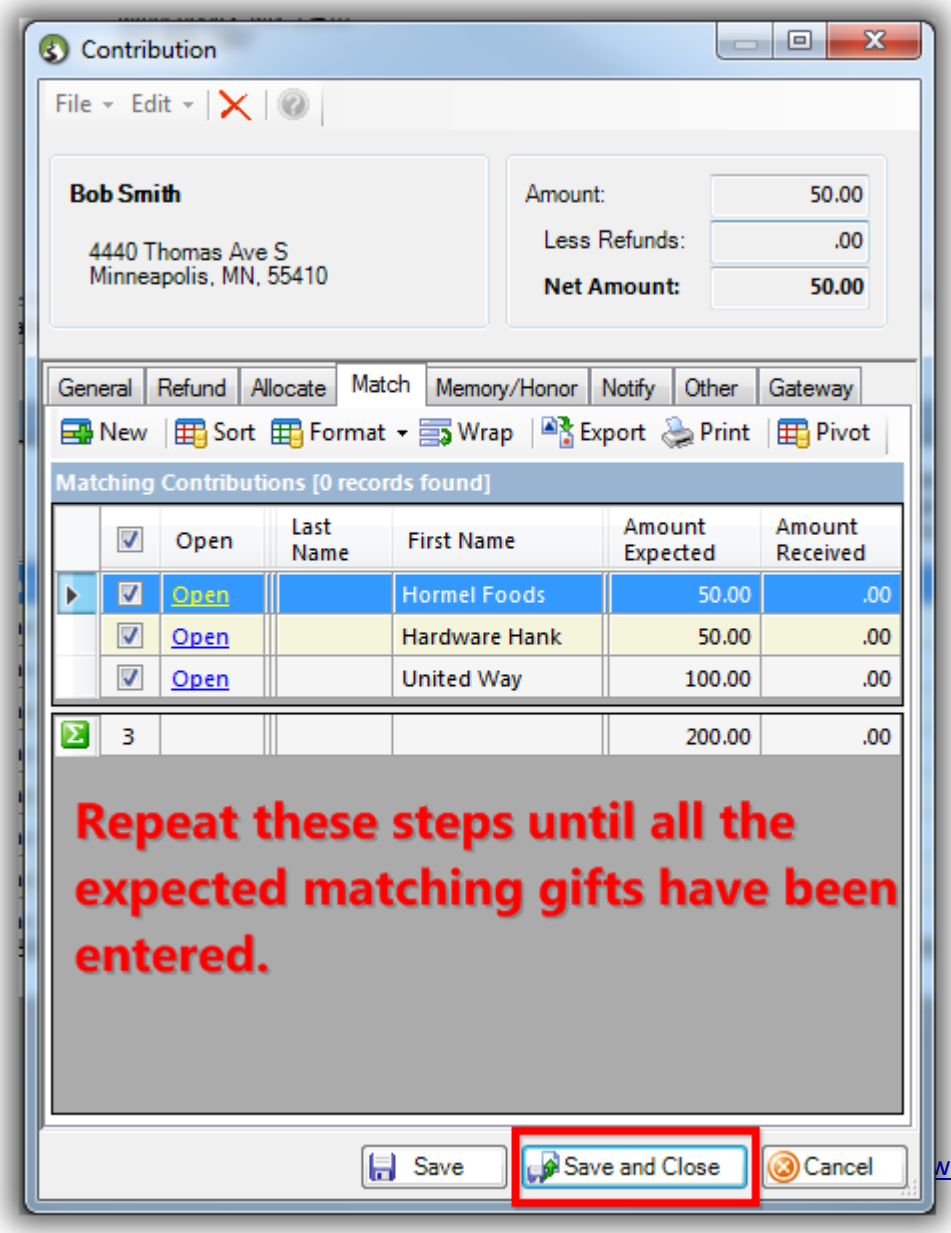


Select the matching donor.

If necessary you can adjust the matching amount. This will

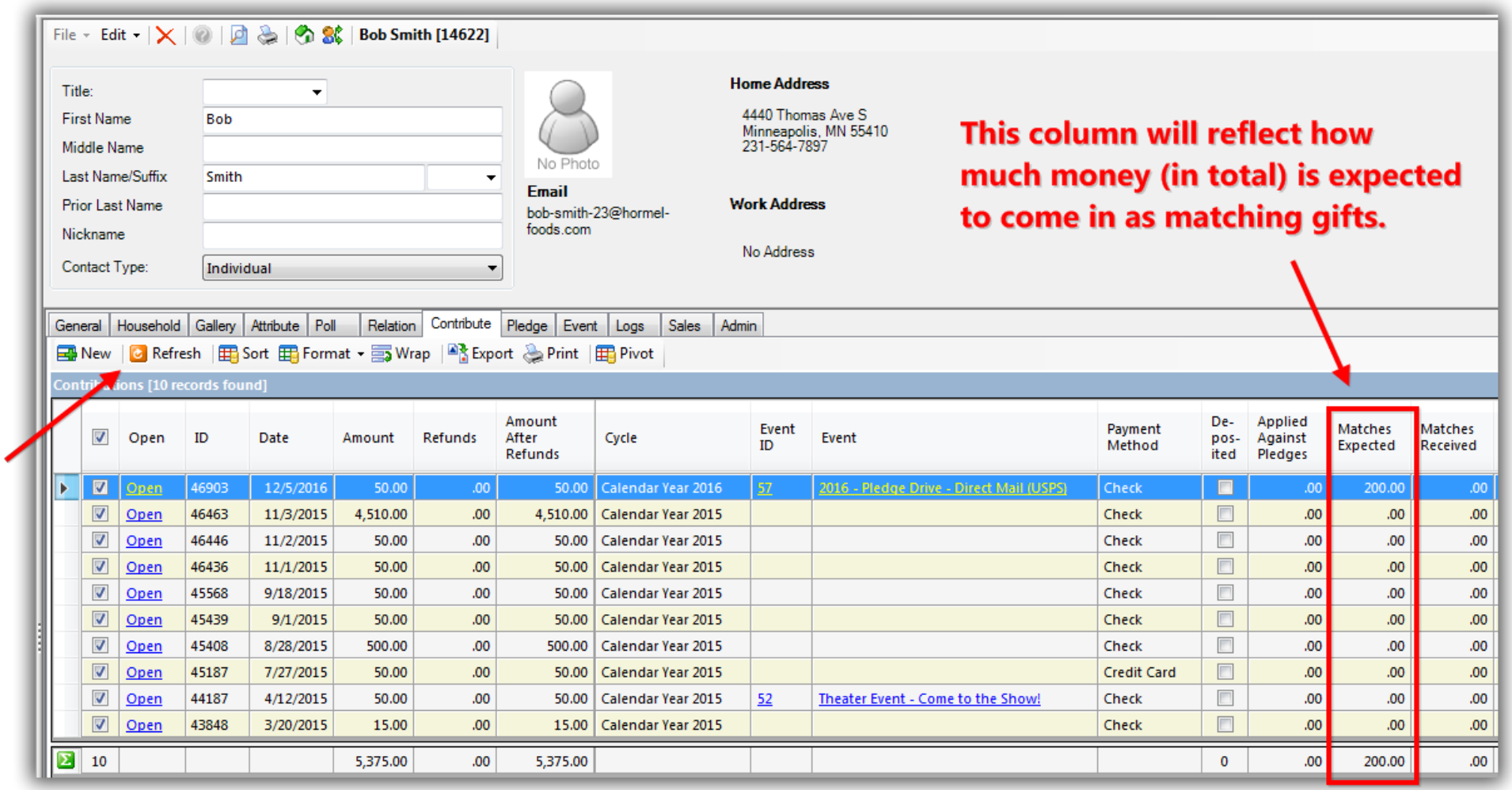
Repeat this step until all the expected matching gifts have been recorded, and then click **[OK]**.

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



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.

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



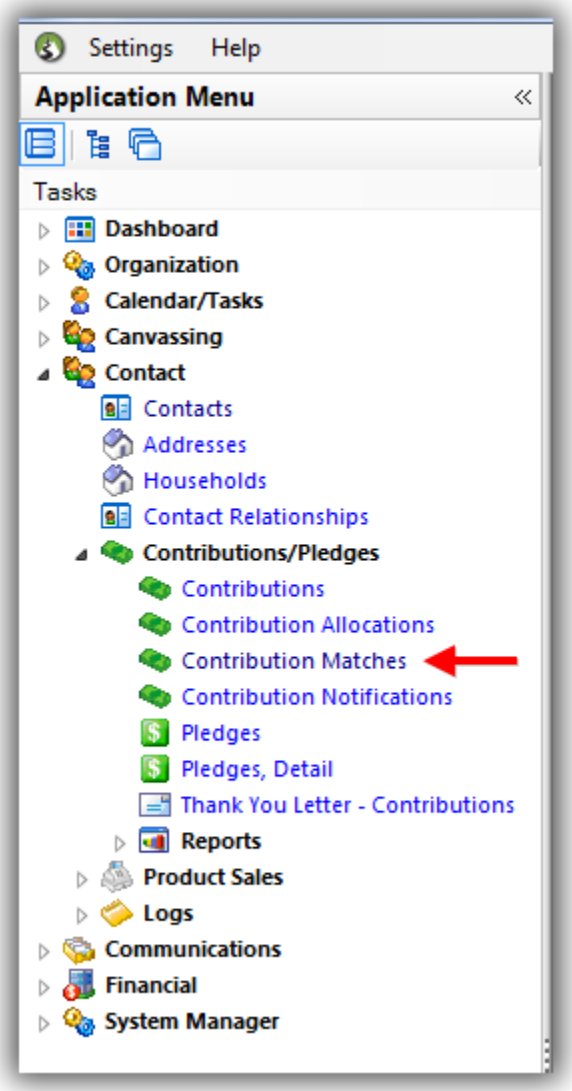
	Open	ID	Date	Amount	Refunds	Amount After Refunds	Cycle	Event ID	Event	Payment Method	De-posited	Applied Against Pledges	Matches Expected	Matches Received
☑	Open	46903	12/5/2016	50.00	.00	50.00	Calendar Year 2016	57	2016 - Pledge Drive - Direct Mail (USPS)	Check	☐	.00	200.00	.00
☑	Open	46463	11/3/2015	4,510.00	.00	4,510.00	Calendar Year 2015			Check	☐	.00	.00	.00
☑	Open	46446	11/2/2015	50.00	.00	50.00	Calendar Year 2015			Check	☐	.00	.00	.00
☑	Open	46436	11/1/2015	50.00	.00	50.00	Calendar Year 2015			Check	☐	.00	.00	.00
☑	Open	45568	9/18/2015	50.00	.00	50.00	Calendar Year 2015			Check	☐	.00	.00	.00
☑	Open	45439	9/1/2015	50.00	.00	50.00	Calendar Year 2015			Check	☐	.00	.00	.00
☑	Open	45408	8/28/2015	500.00	.00	500.00	Calendar Year 2015			Check	☐	.00	.00	.00
☑	Open	45187	7/27/2015	50.00	.00	50.00	Calendar Year 2015			Credit Card	☐	.00	.00	.00
☑	Open	44187	4/12/2015	50.00	.00	50.00	Calendar Year 2015	52	Theater Event - Come to the Show!	Check	☐	.00	.00	.00
☑	Open	43848	3/20/2015	15.00	.00	15.00	Calendar Year 2015			Check	☐	.00	.00	.00
Σ	10			5,375.00	.00	5,375.00					0	.00	200.00	.00

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

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

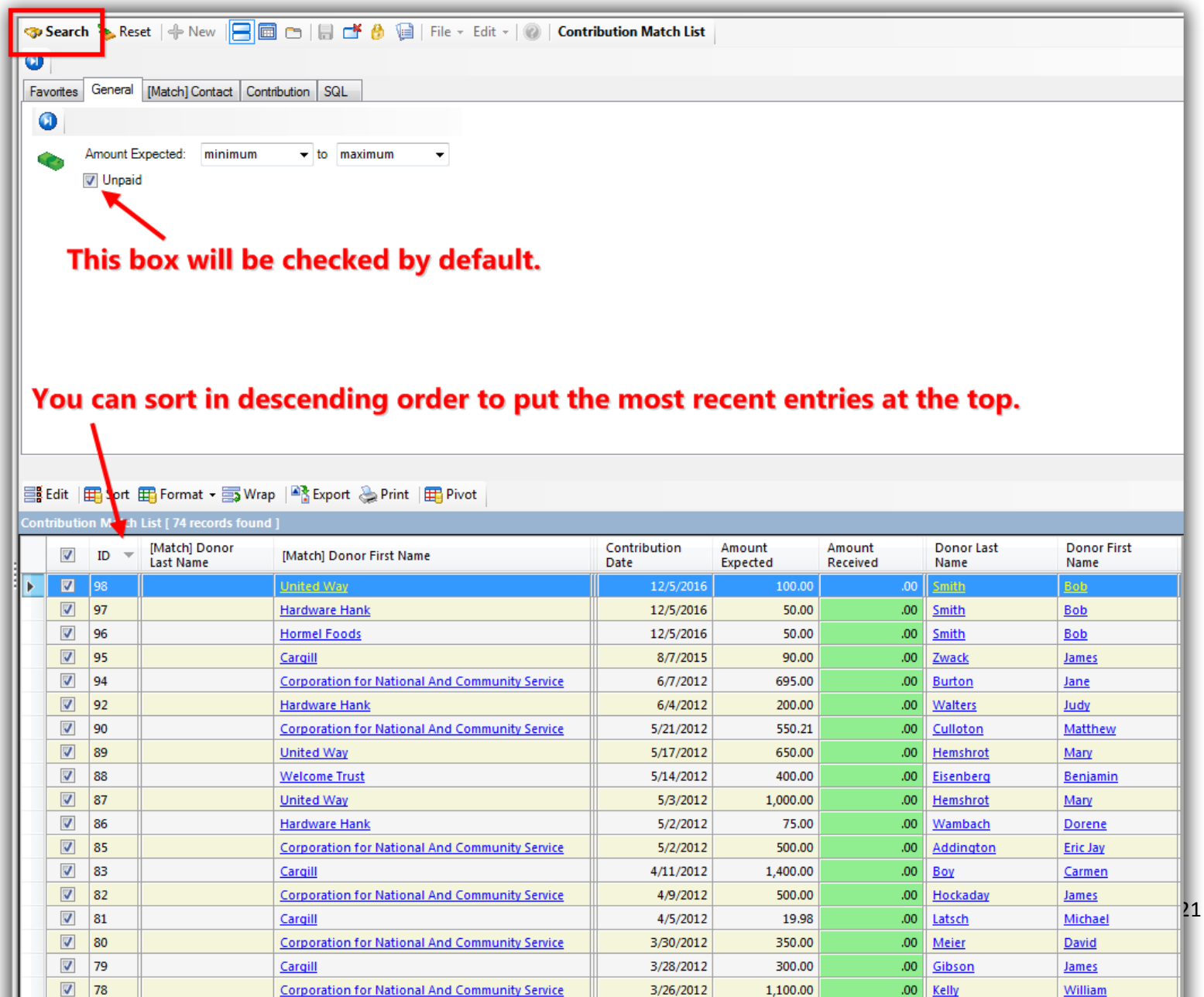
Under the **Application Menu** navigate to the **Contribution Matches** list.

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



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.*

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

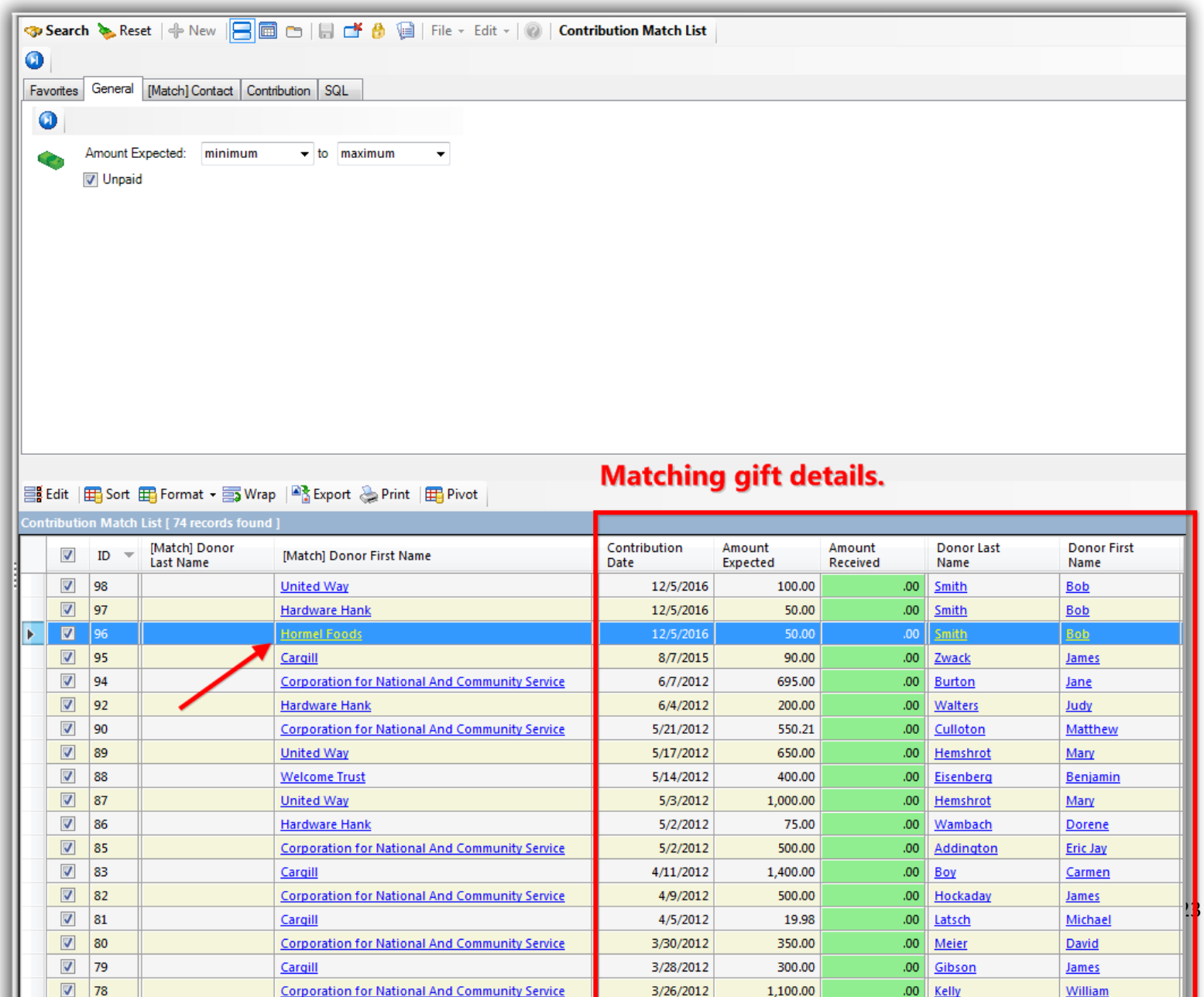


ID	[Match] Donor Last Name	[Match] Donor First Name	Contribution Date	Amount Expected	Amount Received	Donor Last Name	Donor First Name
98		United Way	12/5/2016	100.00	.00	Smith	Bob
97		Hardware Hank	12/5/2016	50.00	.00	Smith	Bob
96		Hormel Foods	12/5/2016	50.00	.00	Smith	Bob
95		Cargill	8/7/2015	90.00	.00	Zwack	James
94		Corporation for National And Community Service	6/7/2012	695.00	.00	Burton	Jane
92		Hardware Hank	6/4/2012	200.00	.00	Walters	Judy
90		Corporation for National And Community Service	5/21/2012	550.21	.00	Culloton	Matthew
89		United Way	5/17/2012	650.00	.00	Hemshrot	Mary
88		Welcome Trust	5/14/2012	400.00	.00	Eisenberg	Benjamin
87		United Way	5/3/2012	1,000.00	.00	Hemshrot	Mary
86		Hardware Hank	5/2/2012	75.00	.00	Wambach	Dorene
85		Corporation for National And Community Service	5/2/2012	500.00	.00	Addington	Eric Jay
83		Cargill	4/11/2012	1,400.00	.00	Boy	Carmen
82		Corporation for National And Community Service	4/9/2012	500.00	.00	Hockaday	James
81		Cargill	4/5/2012	19.98	.00	Latsch	Michael
80		Corporation for National And Community Service	3/30/2012	350.00	.00	Meier	David
79		Cargill	3/28/2012	300.00	.00	Gibson	James
78		Corporation for National And Community Service	3/26/2012	1,100.00	.00	Kelly	William

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

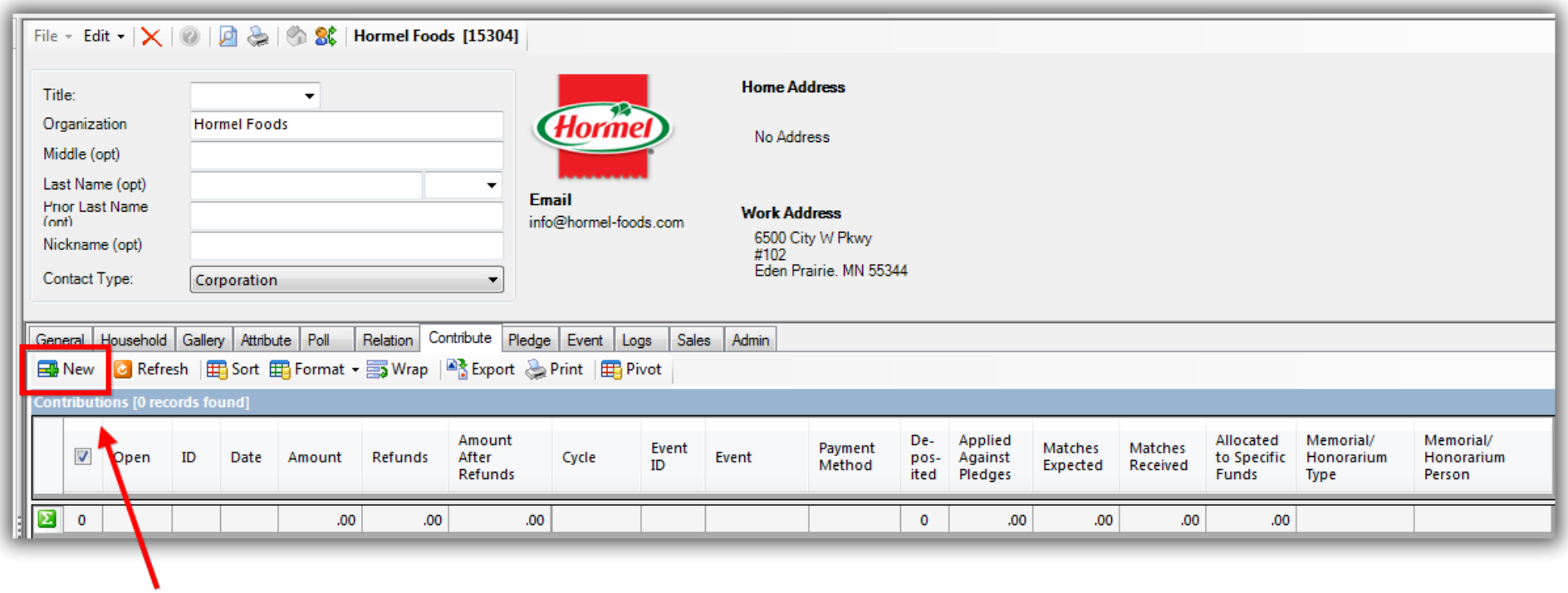
When a donation comes in from a matching donor, click on the **donors name hyperlink** to open their record. *In my example I used Hormel Foods.* ***This step is VERY important, the 'amount received' for a matching gift will *not* update unless you record the donation from the matching donor.***

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



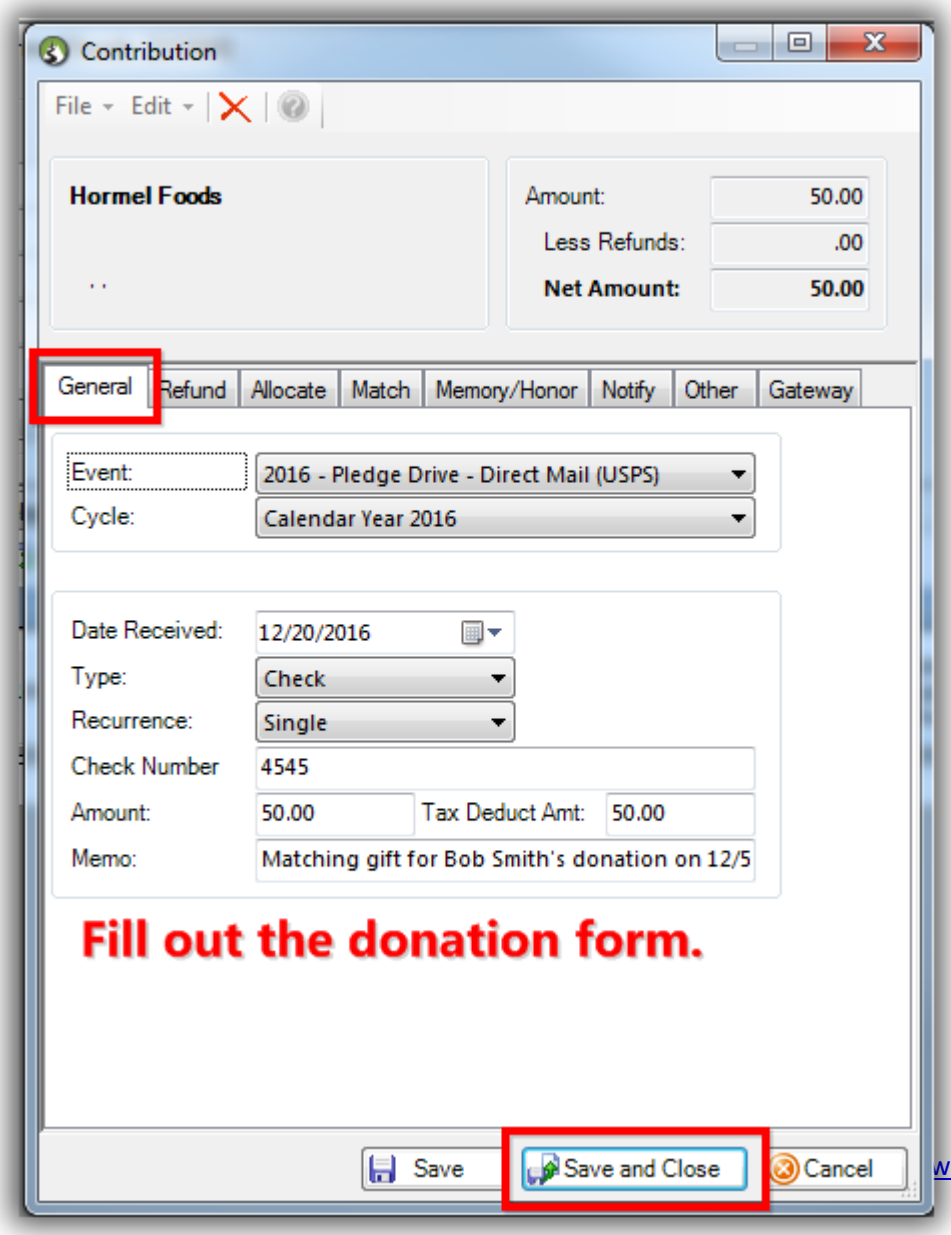
ID	[Match] Donor Last Name	[Match] Donor First Name	Contribution Date	Amount Expected	Amount Received	Donor Last Name	Donor First Name
98		United Way	12/5/2016	100.00	.00	Smith	Bob
97		Hardware Hank	12/5/2016	50.00	.00	Smith	Bob
96		Hormel Foods	12/5/2016	50.00	.00	Smith	Bob
95		Cargill	8/7/2015	90.00	.00	Zwack	James
94		Corporation for National And Community Service	6/7/2012	695.00	.00	Burton	Jane
92		Hardware Hank	6/4/2012	200.00	.00	Walters	Judy
90		Corporation for National And Community Service	5/21/2012	550.21	.00	Culloton	Matthew
89		United Way	5/17/2012	650.00	.00	Hemshrot	Mary
88		Welcome Trust	5/14/2012	400.00	.00	Eisenberg	Benjamin
87		United Way	5/3/2012	1,000.00	.00	Hemshrot	Mary
86		Hardware Hank	5/2/2012	75.00	.00	Wambach	Dorene
85		Corporation for National And Community Service	5/2/2012	500.00	.00	Addington	Eric Jay
83		Cargill	4/11/2012	1,400.00	.00	Boy	Carmen
82		Corporation for National And Community Service	4/9/2012	500.00	.00	Hockaday	James
81		Cargill	4/5/2012	19.98	.00	Latsch	Michael
80		Corporation for National And Community Service	3/30/2012	350.00	.00	Meier	David
79		Cargill	3/28/2012	300.00	.00	Gibson	James
78		Corporation for National And Community Service	3/26/2012	1,100.00	.00	Kelly	William

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



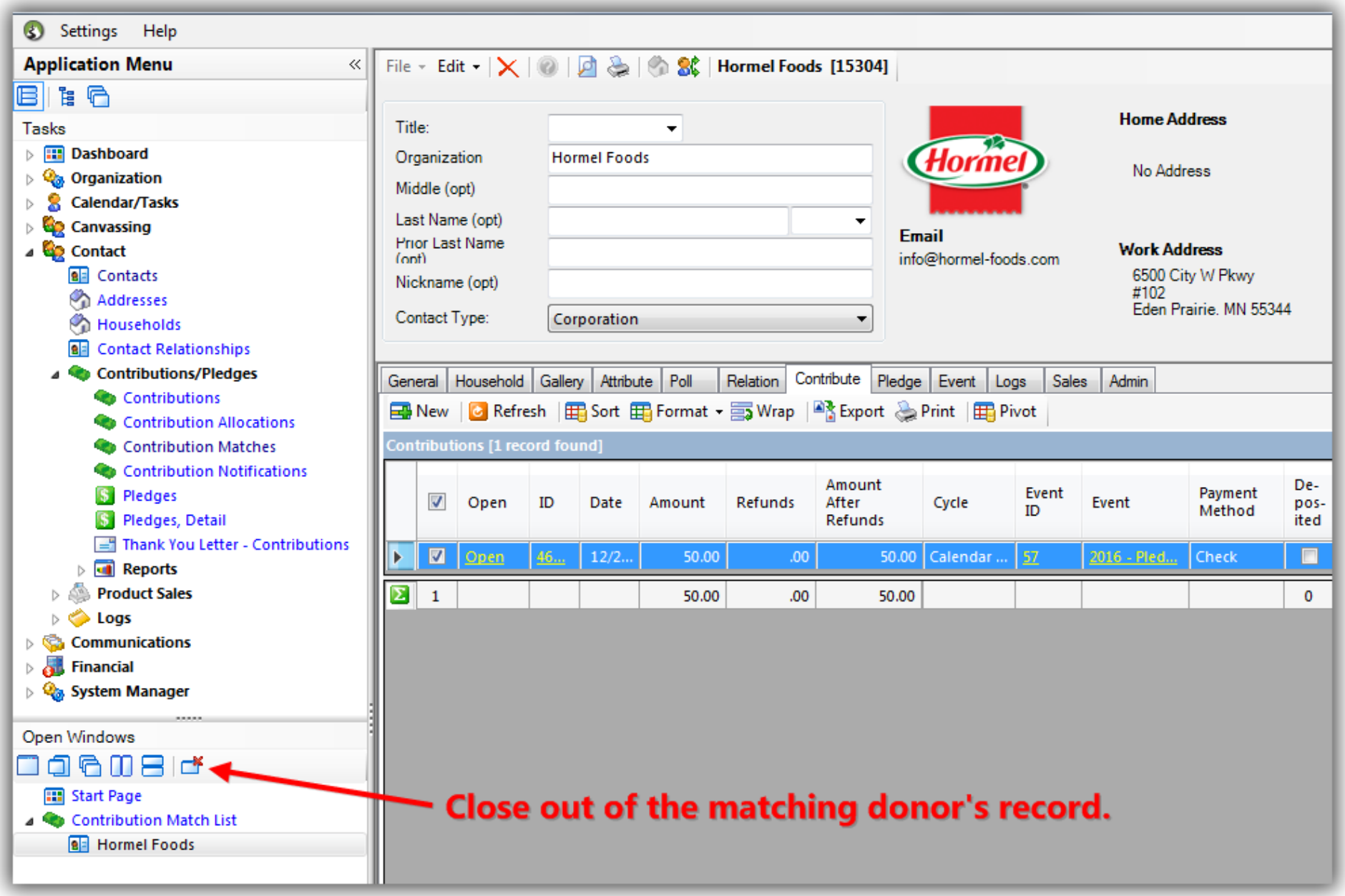
Fill out the donation form and then **[Save and Close]**. *It's not a bad idea to **record a note** that the gift is for a matching contribution, my example is below.*

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



Close out of the matching donor's record and return back to the **Contribution Matches** list.

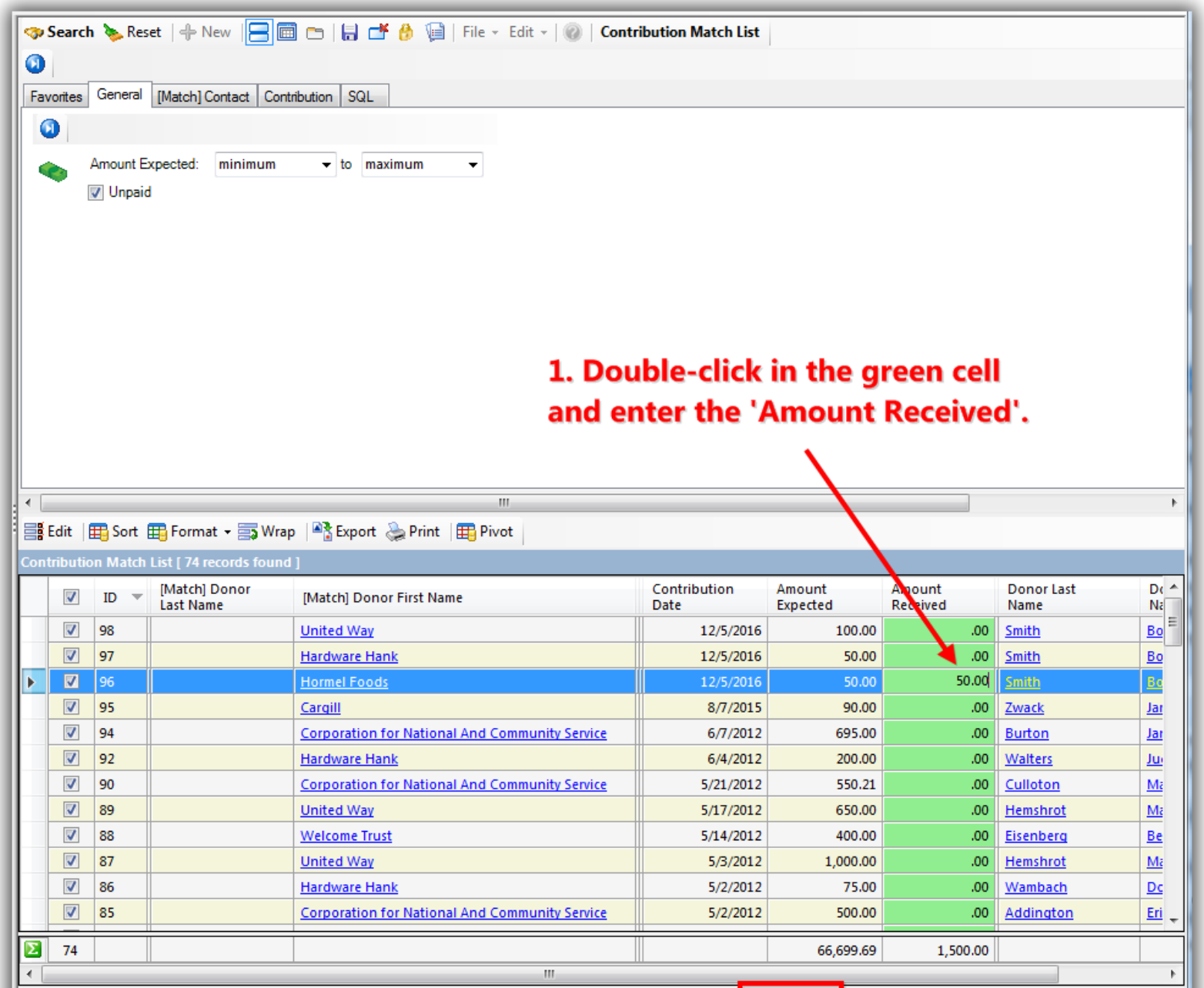
Matching Contributions – Setup Companies/Orgs as a Matching Donor, View Unfulfilled Matching Gifts and Record the Matching Gifts as they Come In



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

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.

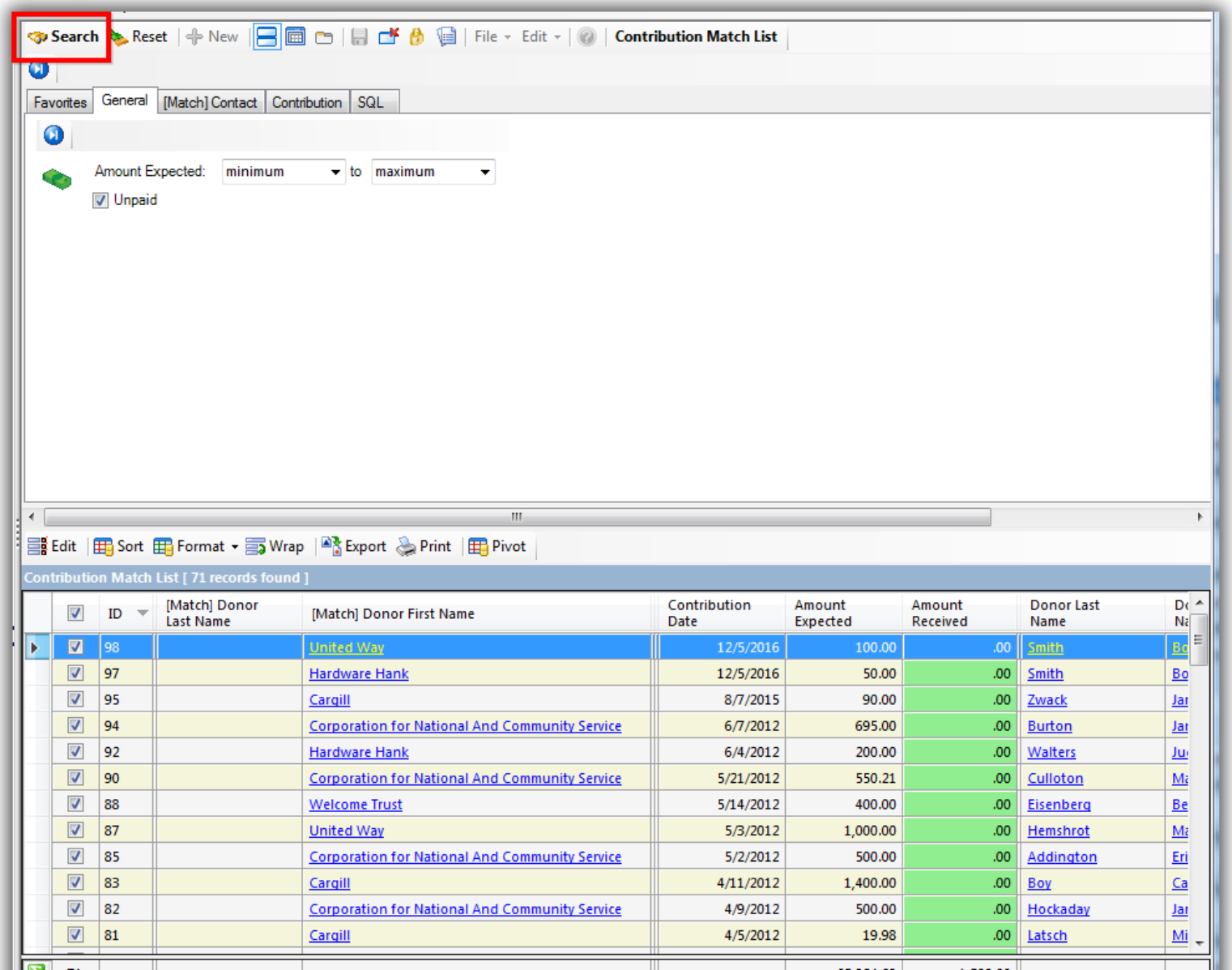
Matching Contributions – Setup Companies/Orgs as a Matching Donor, View Unfulfilled Matching Gifts and Record the Matching Gifts as they Come In



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

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

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



ID	[Match] Donor Last Name	[Match] Donor First Name	Contribution Date	Amount Expected	Amount Received	Donor Last Name
98		United Way	12/5/2016	100.00	.00	Smith
97		Hardware Hank	12/5/2016	50.00	.00	Smith
95		Cargill	8/7/2015	90.00	.00	Zwack
94		Corporation for National And Community Service	6/7/2012	695.00	.00	Burton
92		Hardware Hank	6/4/2012	200.00	.00	Walters
90		Corporation for National And Community Service	5/21/2012	550.21	.00	Culloton
88		Welcome Trust	5/14/2012	400.00	.00	Eisenberg
87		United Way	5/3/2012	1,000.00	.00	Hemshrot
85		Corporation for National And Community Service	5/2/2012	500.00	.00	Addington
83		Cargill	4/11/2012	1,400.00	.00	Boy
82		Corporation for National And Community Service	4/9/2012	500.00	.00	Hockaday
81		Cargill	4/5/2012	19.98	.00	Latsch

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

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

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

Trail Blazer Live Support

✆ **Phone:** 1-866-909-8700
✉ **Email:** support@trailblz.com

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

Facebook: https://www.facebook.com/pages/Trail-Blazer-Software/64872951180
Twitter: https://twitter.com/trailblazersoft

** As a policy we require that you have taken our intro training class before calling or emailing our live support team.*

Click here 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 GoToMeeting session where we host our live interactive trainings.*

** This service is included in your contract.*