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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

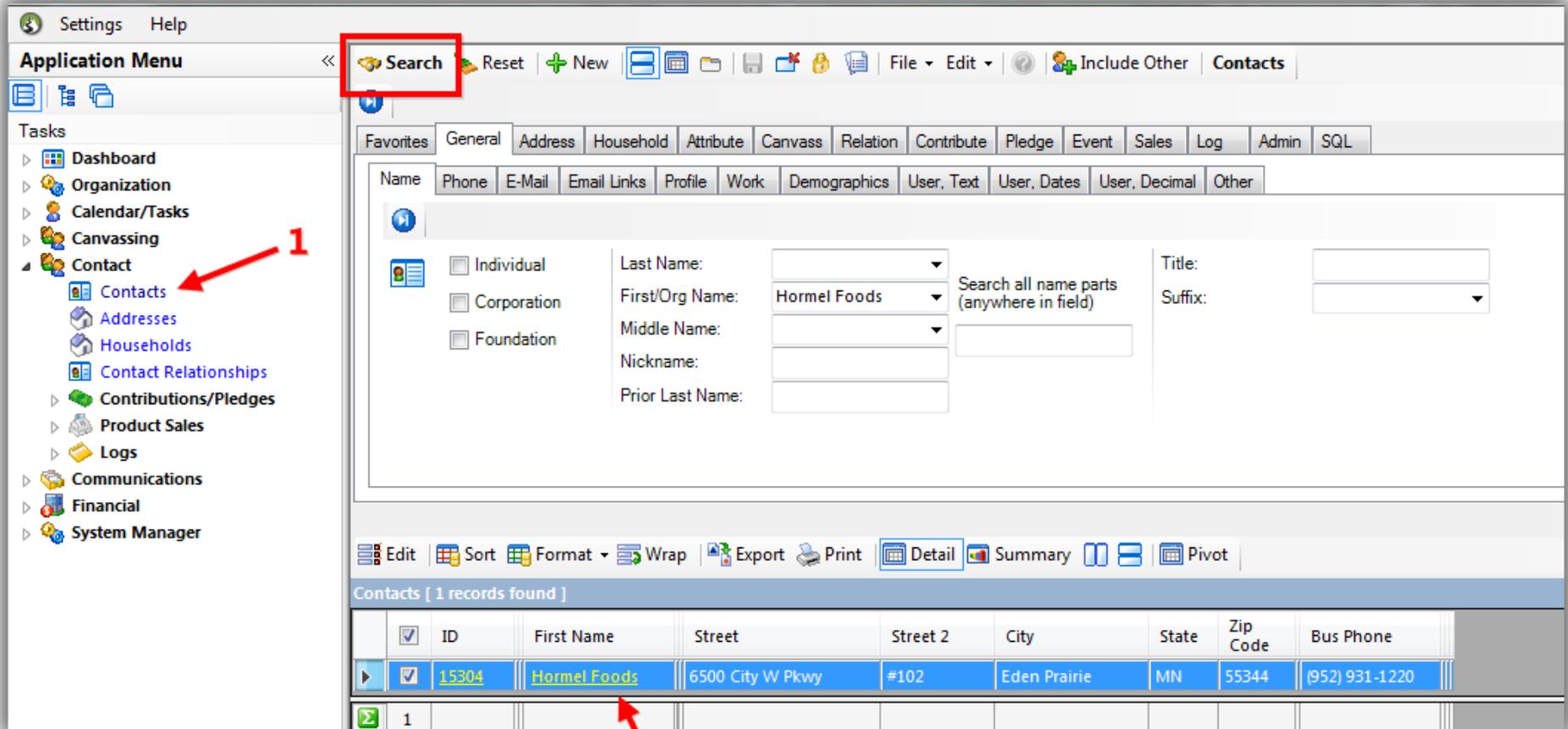
- #1 Setup a Company/Organization as a Matching Donor & Enter the Percentage they're willing to Match
- #2 Recording a Donation and Flagging it as needing a Matching Gift
- #3 Viewing a Report of Unfulfilled Matching Gifts & Recording them as they come in
- #4 Related Resources

#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.



The screenshot shows the TrailBlazer interface with the following elements:

- Application Menu:** Search (highlighted with a red box), Reset, New, File, Edit, Include Other, Contacts.
- Tasks:** Dashboard, Organization, Calendar/Tasks, Canvassing, **Contact** (with a red arrow and '1' pointing to 'Contacts'), Addresses, Households, Contact Relationships, Contributions/Pledges, Product Sales, Logs, Communications, Financial, System Manager.
- Search Form:** Individual, Corporation, Foundation. Last Name, First/Org Name (Hormel Foods), Middle Name, Nickname, Prior Last Name, Title, Suffix. Search all name parts (anywhere in field).
- Search Results:** Contacts [1 records found]
- Table:**

ID	First Name	Street	Street 2	City	State	Zip Code	Bus Phone
15304	Hormel Foods	6500 City W Pkwy	#102	Eden Prairie	MN	55344	(952) 931-1220

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

File Edit [X] [Icons] | Hormel Foods [15304]

Title: [Dropdown]
Organization: Hormel Foods
Middle (opt): [Text]
Last Name (opt): [Text] [Dropdown]
Prior Last Name (opt): [Text]
Nickname (opt): [Text]
Contact Type: Corporation



Home Address: No Address
Work Address: 6500 City W Pkwy #102 Eden Prairie, MN 55344
Email: info@hormel-foods.com

General Household Gallery Attribute Poll Relation Contribute Pledge Event Logs Sales Admin

Address Contact Profile Work User Membership **Other**

This organization (or individual) has agreed to match contributions received from others.

Match Percentage: 100

1

2

3

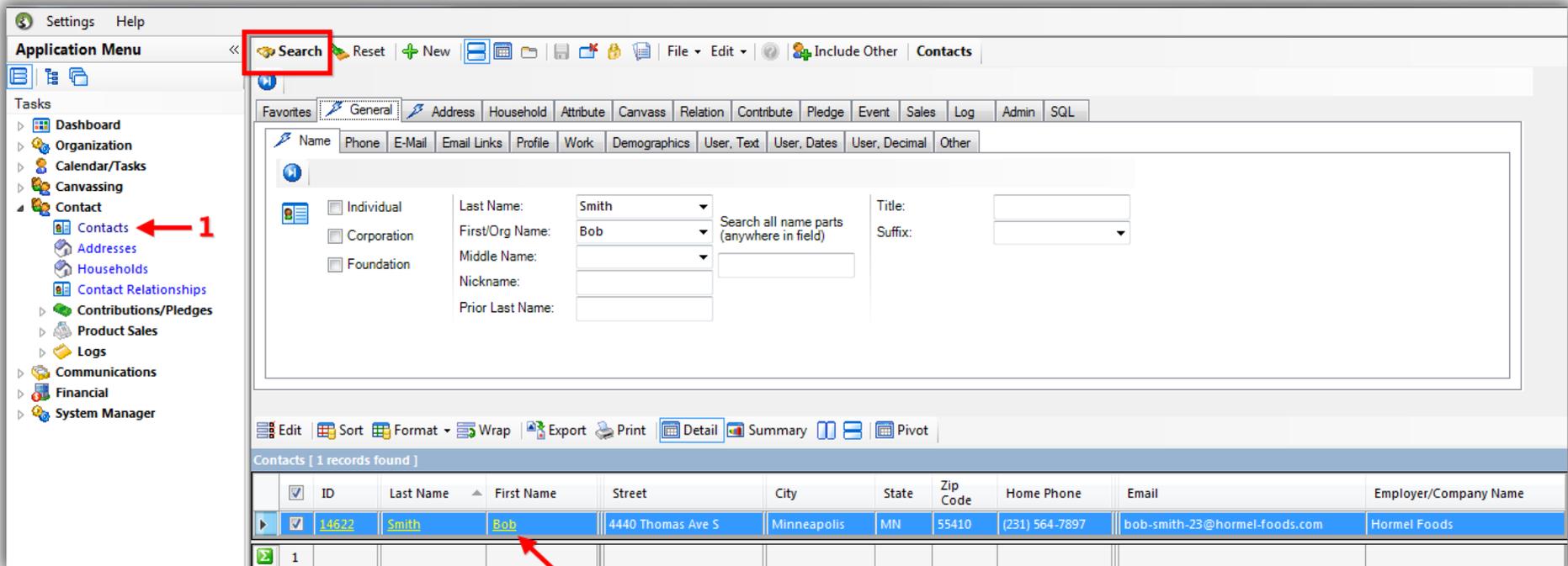
Repeat these steps for all donors who are willing to provide a matching gift. The next section shows how to record the original donation and flag it as needing a matching gift.

#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

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



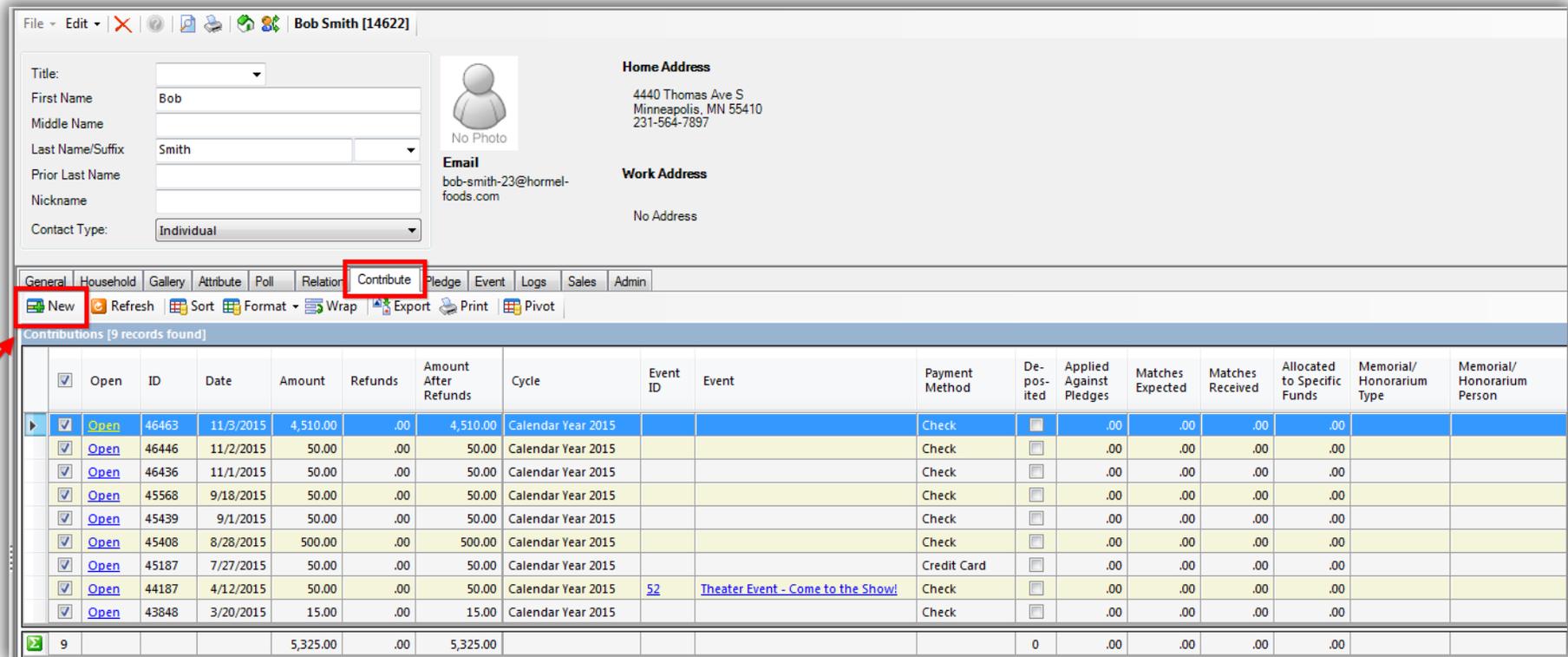
The screenshot shows the TrailBlazer application interface. The 'Search' button in the top navigation bar is highlighted with a red box. In the left-hand 'Tasks' menu, the 'Contacts' item is highlighted with a red arrow and the number '1'. The main window displays a search form with fields for Last Name (Smith), First/Org Name (Bob), Middle Name, Nickname, and Prior Last Name. Below the form, a table of search results is shown with the following data:

ID	Last Name	First Name	Street	City	State	Zip Code	Home Phone	Email	Employer/Company Name
14672	Smith	Bob	4440 Thomas Ave S	Minneapolis	MN	55410	(231) 564-7897	bob-smith-23@hormel-foods.com	Hormel Foods

3 - open their record to record the original donation.

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



Bob Smith [14622]

Title: [Dropdown]
First Name: Bob
Middle Name: [Empty]
Last Name/Suffix: Smith
Prior Last Name: [Empty]
Nickname: [Empty]
Contact Type: Individual

Home Address:
 4440 Thomas Ave S
 Minneapolis, MN 55410
 231-564-7897

Work Address:
 No Address

Email:
 bob-smith-23@hormel-foods.com

Contribute | Pledge | Event | Logs | Sales | Admin

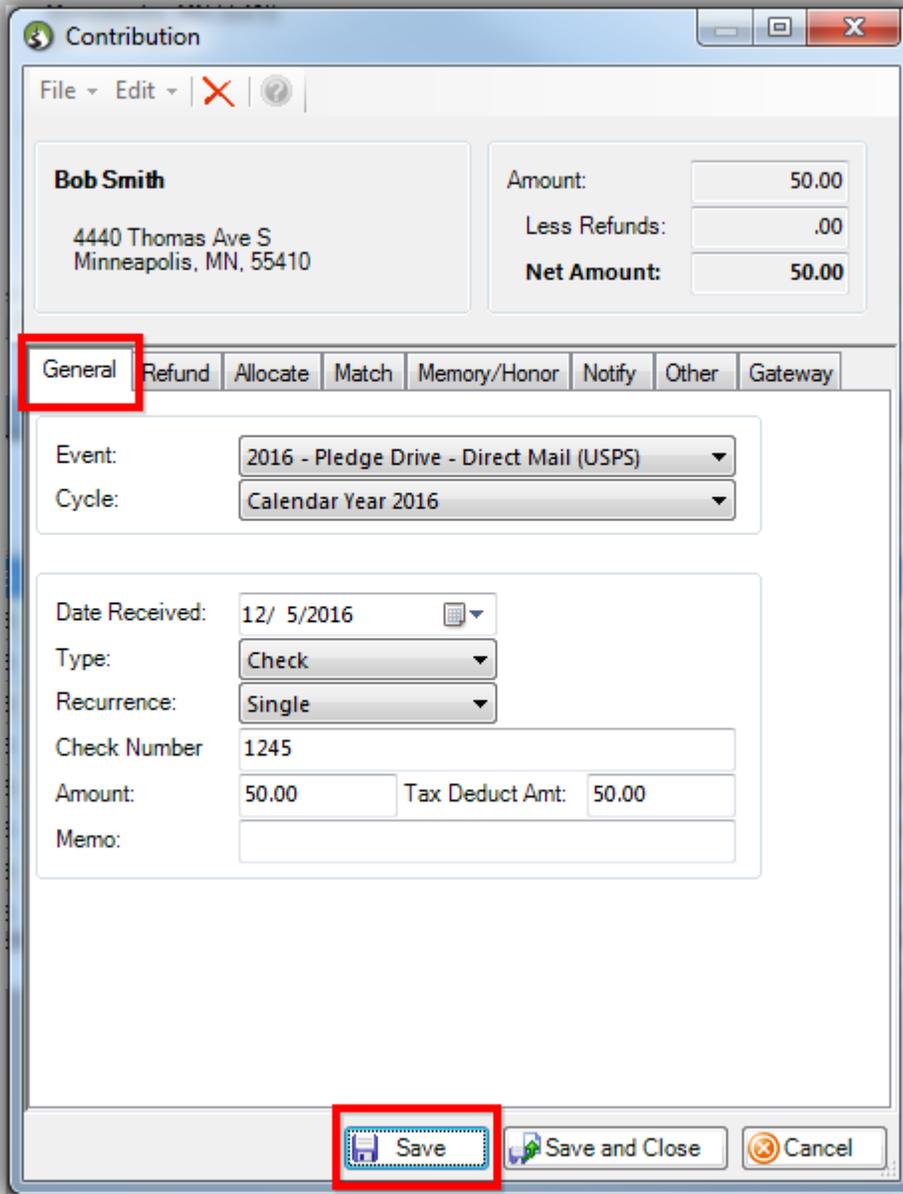
Contributions [9 records found]

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

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

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



Contribution

File Edit X ?

Bob Smith
4440 Thomas Ave S
Minneapolis, MN, 55410

Amount: 50.00
Less Refunds: .00
Net Amount: 50.00

General Refund Allocate Match Memory/Honor Notify Other Gateway

Event: 2016 - Pledge Drive - Direct Mail (USPS)
Cycle: Calendar Year 2016

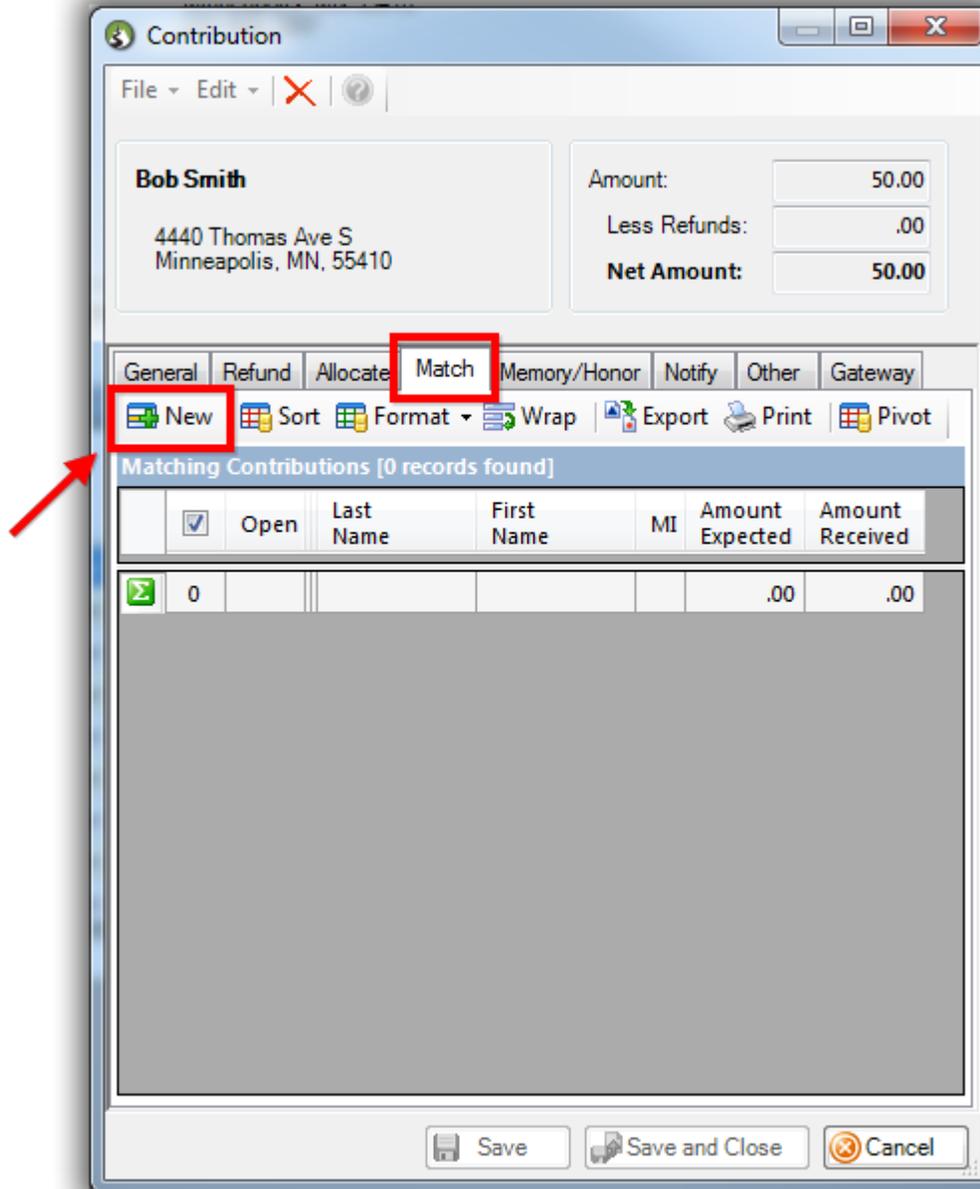
Date Received: 12/ 5/2016
Type: Check
Recurrence: Single
Check Number: 1245
Amount: 50.00 Tax Deduct Amt: 50.00
Memo:

Save Save and Close Cancel

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]**.

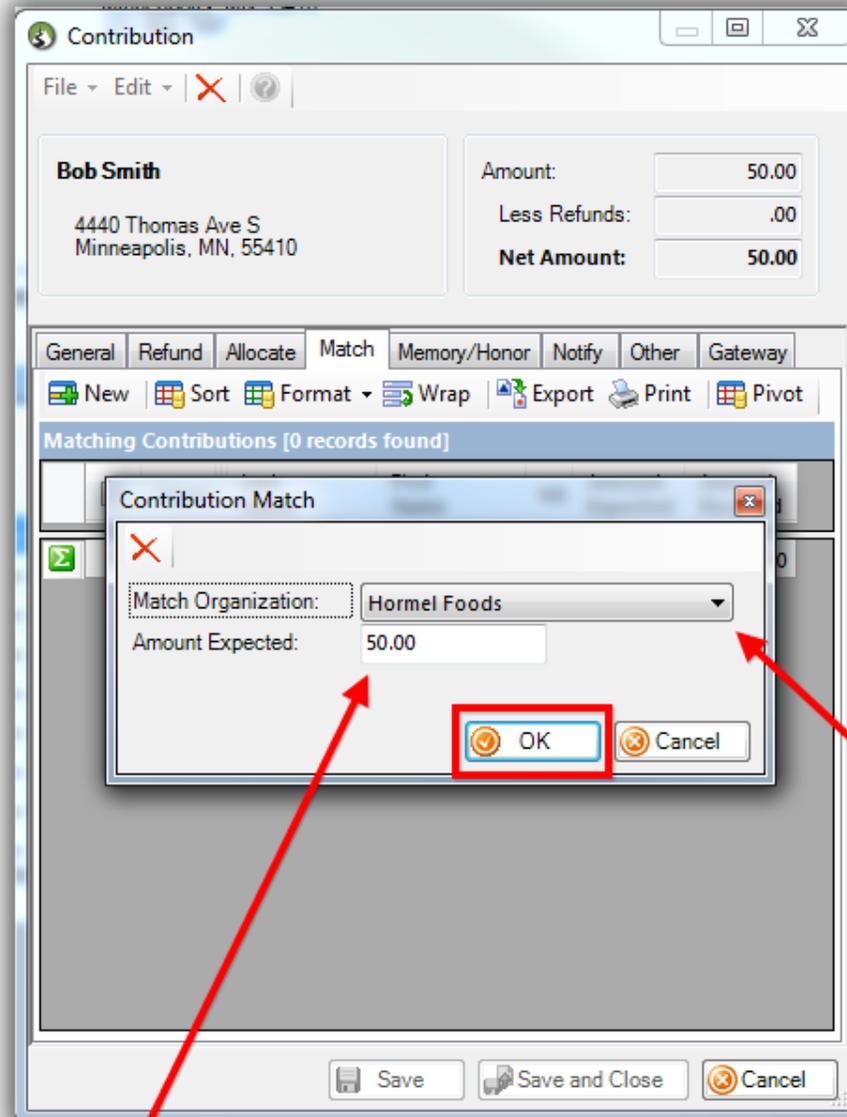
Matching Contributions – Setup Companies/Orgs as a Matching Donor, View Unfulfilled Matching Gifts and Record the Matching Gifts as they Come In



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



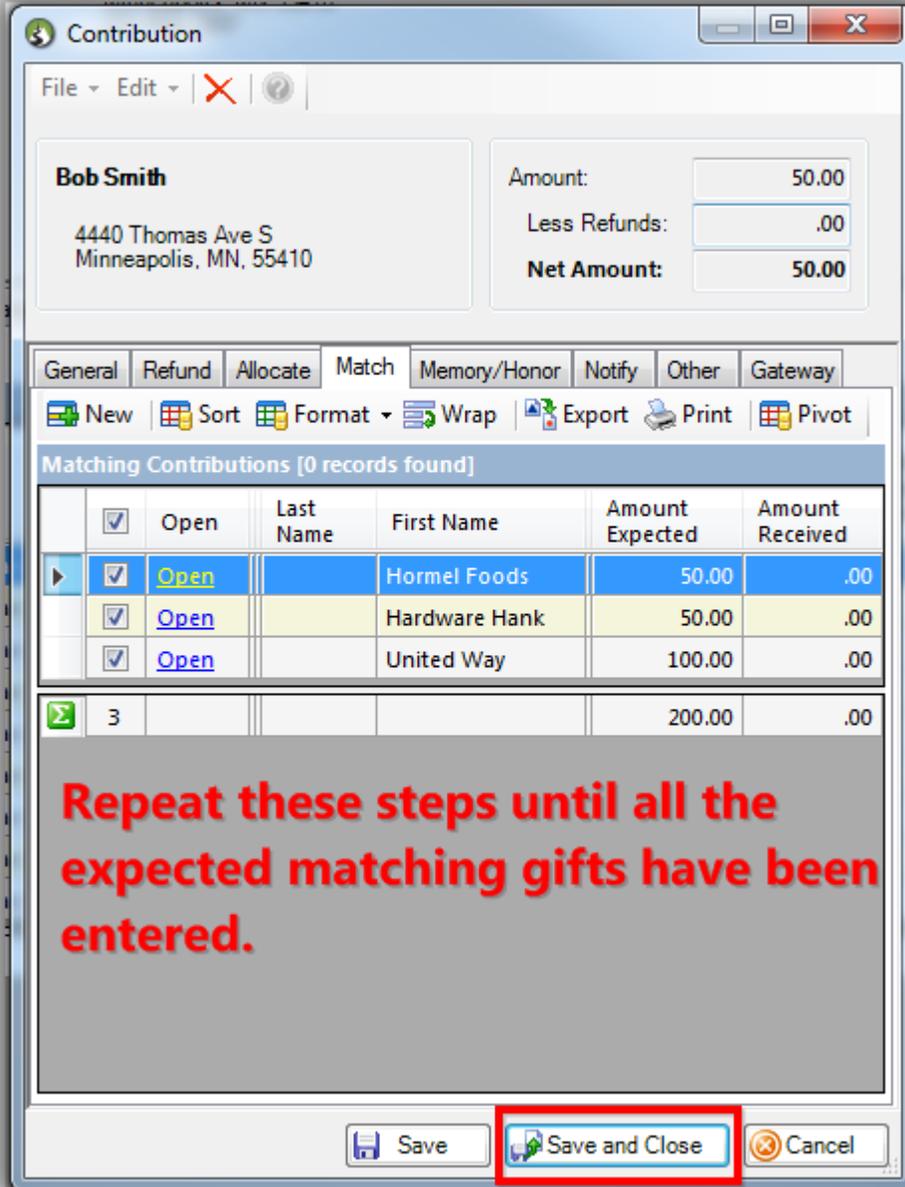
Select the matching donor.

If necessary you can adjust the matching amount. This will

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

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



The screenshot shows the 'Contribution' window in TrailBlazer. The donor information for Bob Smith is displayed, along with the contribution amount of 50.00. The 'Match' tab is selected, showing a table of matching contributions. The table has columns for 'Open', 'Last Name', 'First Name', 'Amount Expected', and 'Amount Received'. Three entries are listed: Hormel Foods (50.00 expected, .00 received), Hardware Hank (50.00 expected, .00 received), and United Way (100.00 expected, .00 received). A summary row at the bottom shows a total of 3 entries with 200.00 expected and .00 received. A red text box is overlaid on the bottom of the window, and the 'Save and Close' button is highlighted with a red box.

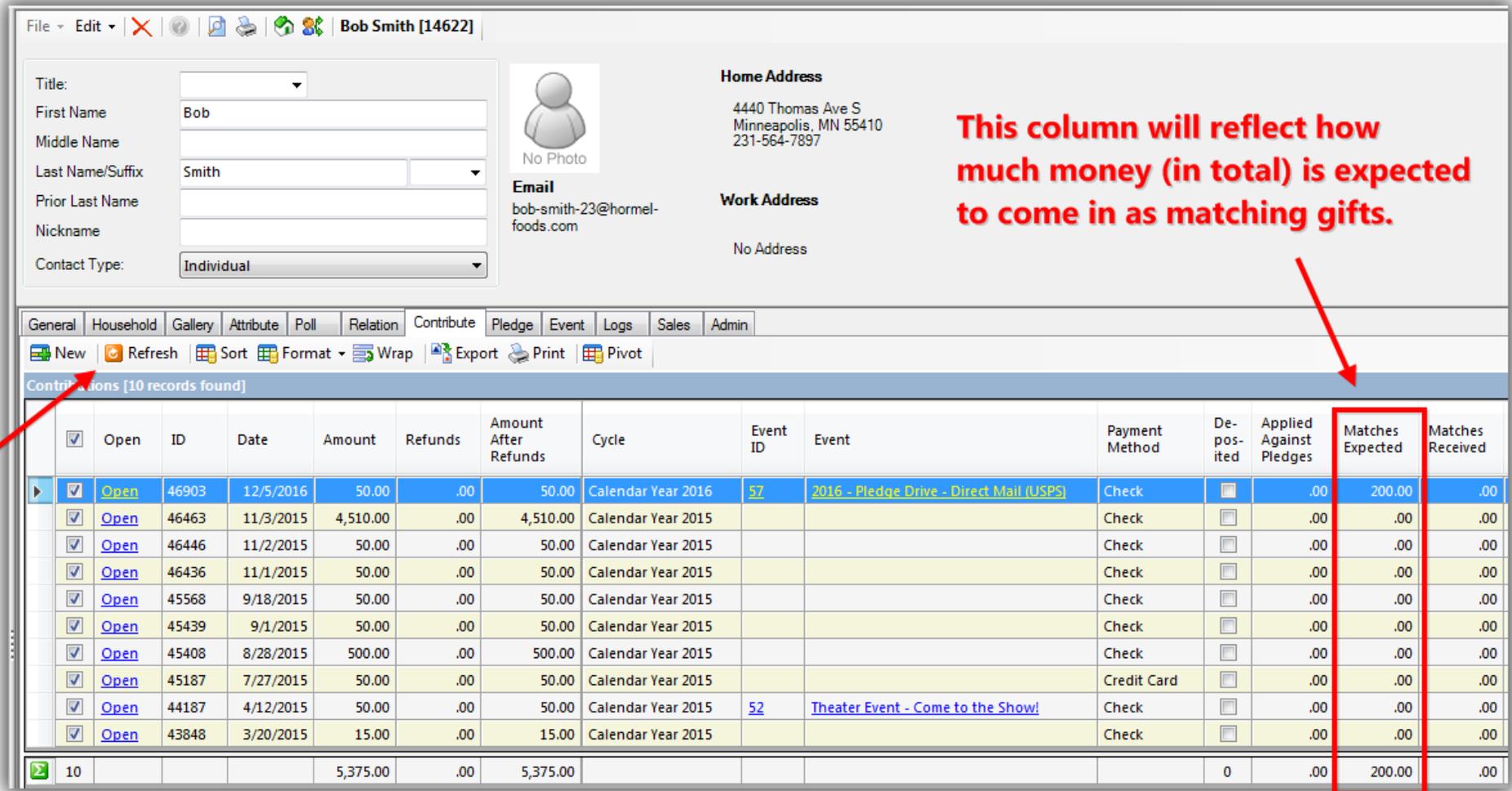
Repeat these steps until all the expected matching gifts have been entered.

Save Save and Close Cancel

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



This column will reflect how much money (in total) is expected to come in as matching gifts.

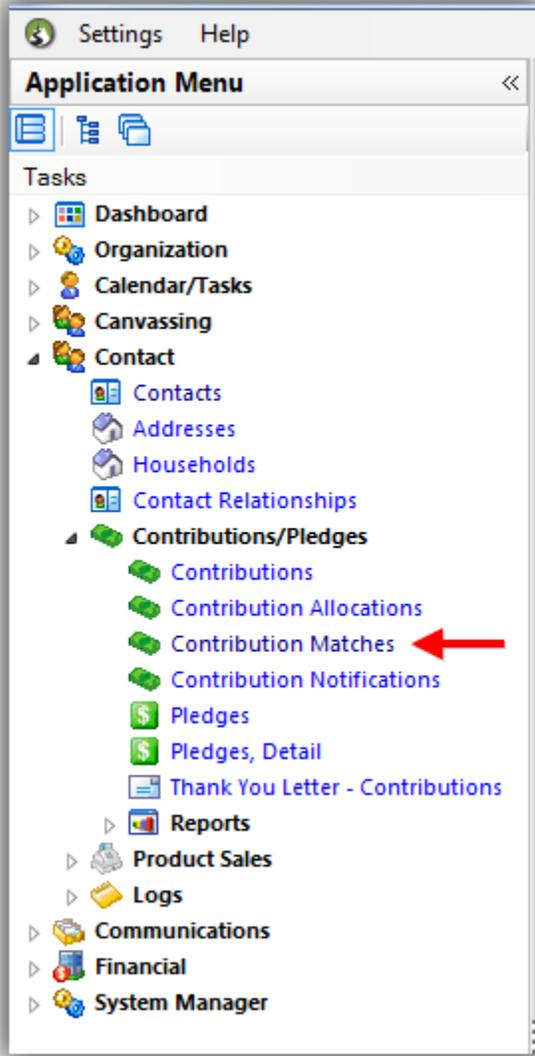
Open	ID	Date	Amount	Refunds	Amount After Refunds	Cycle	Event ID	Event	Payment Method	De-posit-ed	Applied Against Pledges	Matches Expected	Matches Received
<input checked="" type="checkbox"/>	46903	12/5/2016	50.00	.00	50.00	Calendar Year 2016	57	2016 - Pledge Drive - Direct Mail (USPS)	Check	<input type="checkbox"/>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



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

Search Reset + New [Icons] File Edit Contribution Match List

Favorites General [Match] Contact Contribution SQL

Amount Expected: minimum to maximum

Unpaid

This box will be checked by default.

You can sort in descending order to put the most recent entries at the top.

Edit Sort Format Wrap Export Print Pivot

Contribution Match List [74 records found]

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

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

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

Search Reset New [Match] Contact Contribution SQL

Amount Expected: minimum to maximum
 Unpaid

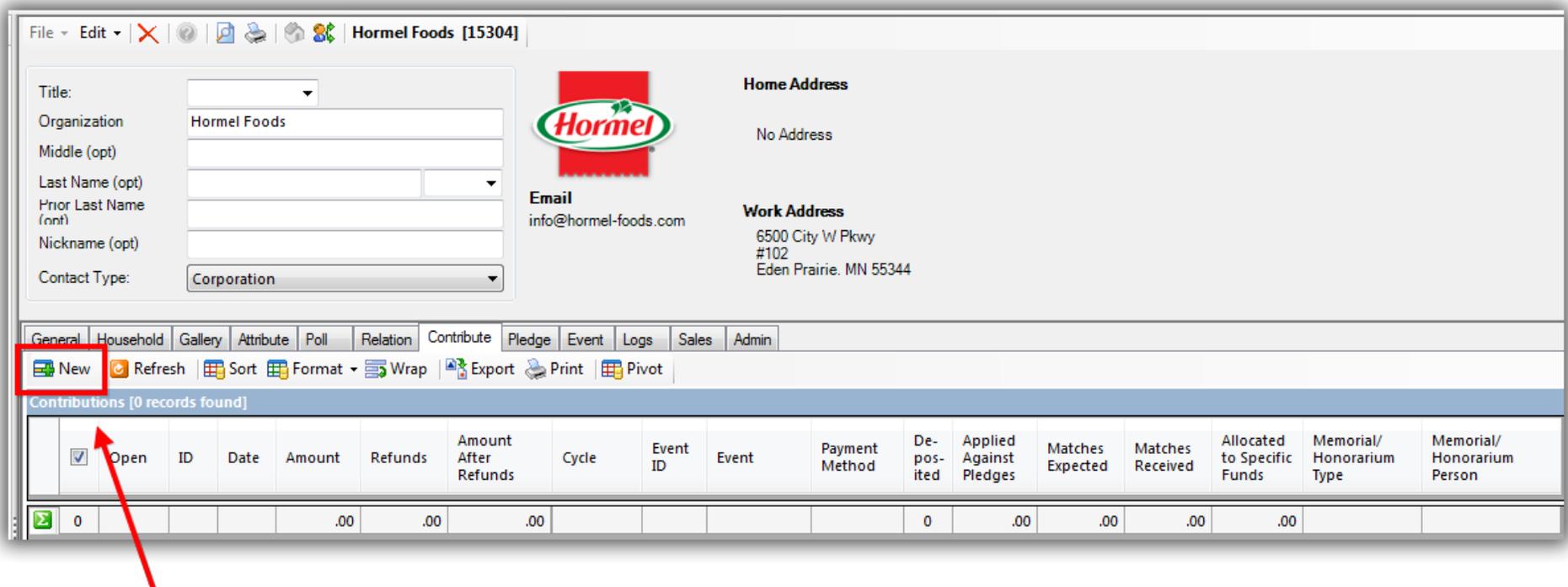
Matching gift details.

Contribution Match List [74 records found]

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

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]**.

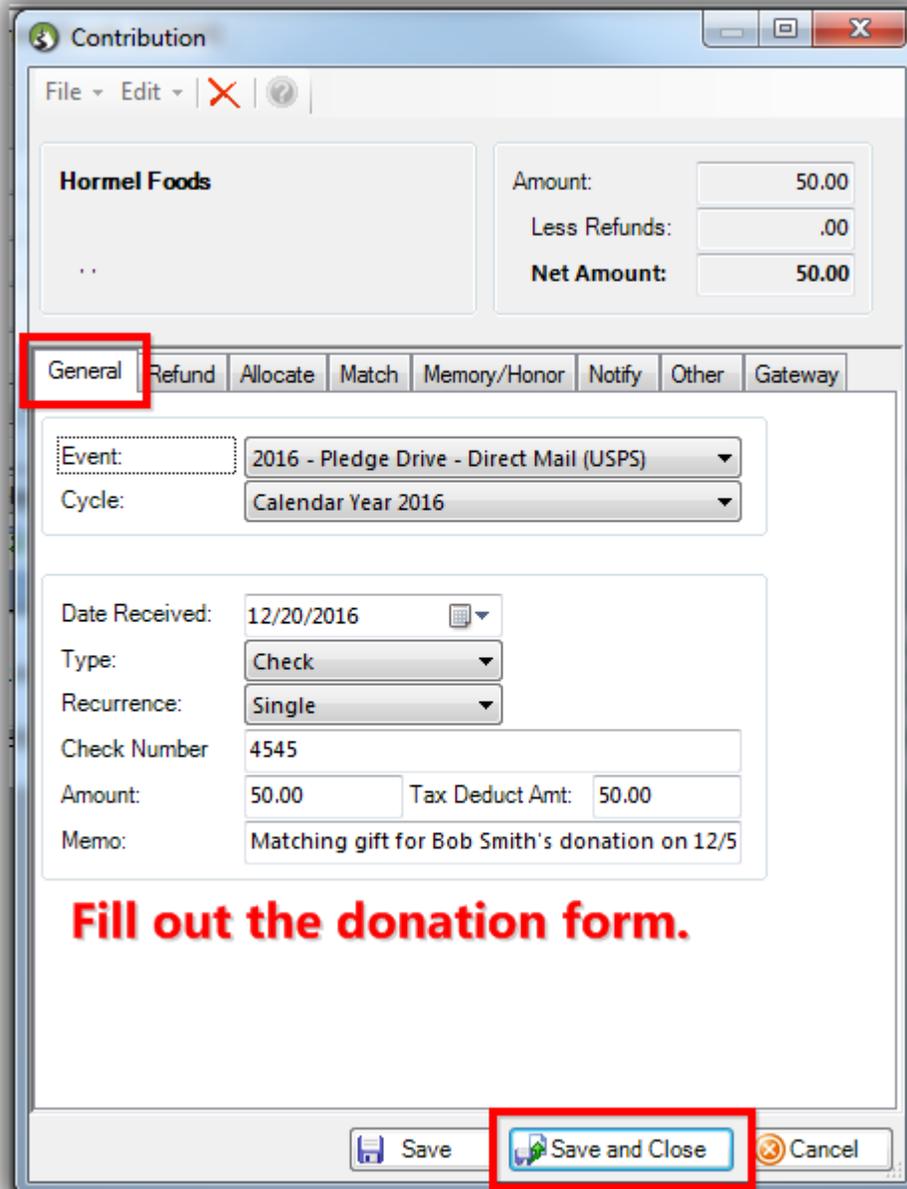


The screenshot shows the TrailBlazer software interface for managing contributions. The window title is "Hormel Foods [15304]". The interface is divided into several sections:

- Form Fields:** Title, Organization (Hormel Foods), Middle (opt), Last Name (opt), Prior Last Name (nnt), Nickname (opt), and Contact Type (Corporation).
- Image:** The Hormel logo is displayed.
- Home Address:** No Address.
- Work Address:** 6500 City W Pkwy, #102, Eden Prairie, MN 55344.
- Email:** info@hormel-foods.com.
- Tabs:** General, Household, Gallery, Attribute, Poll, Relation, **Contribute**, Pledge, Event, Logs, Sales, Admin.
- Buttons:** New (highlighted with a red box and arrow), Refresh, Sort, Format, Wrap, Export, Print, Pivot.
- Table:** A table titled "Contributions [0 records found]" with columns: Open, ID, Date, Amount, Refunds, Amount After Refunds, Cycle, Event ID, Event, Payment Method, De-posit-ited, Applied Against Pledges, Matches Expected, Matches Received, Allocated to Specific Funds, Memorial/Honorarium Type, and Memorial/Honorarium Person. The first row shows a value of 0 in the Open column.

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



Contribution

File Edit X

Hormel Foods

Amount: 50.00
Less Refunds: .00
Net Amount: 50.00

General Refund Allocate Match Memory/Honor Notify Other Gateway

Event: 2016 - Pledge Drive - Direct Mail (USPS)
Cycle: Calendar Year 2016

Date Received: 12/20/2016
Type: Check
Recurrence: Single
Check Number: 4545
Amount: 50.00 Tax Deduct Amt: 50.00
Memo: Matching gift for Bob Smith's donation on 12/5

Fill out the donation form.

Save Save and Close Cancel

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

Settings Help

Application Menu

Tasks

- Dashboard
- Organization
- Calendar/Tasks
- Canvassing
- Contact**
 - Contacts
 - Addresses
 - Households
 - Contact Relationships
 - Contributions/Pledges**
 - Contributions
 - Contribution Allocations
 - Contribution Matches
 - Contribution Notifications
 - Pledges
 - Pledges, Detail
 - Thank You Letter - Contributions
 - Reports
- Product Sales
- Logs
- Communications
- Financial
- System Manager

Open Windows

- Start Page
- Contribution Match List
- Hormel Foods

File Edit X [Icons] **Hormel Foods [15304]**

Title:

Organization: Hormel Foods

Middle (opt):

Last Name (opt):

Prior Last Name (opt):

Nickname (opt):

Contact Type: Corporation



Email
info@hormel-foods.com

Home Address
No Address

Work Address
6500 City W Pkwy
#102
Eden Prairie, MN 55344

General Household Gallery Attribute Poll Relation **Contribute** Pledge Event Logs Sales Admin

New Refresh Sort Format Wrap Export Print Pivot

Contributions [1 record found]

<input checked="" type="checkbox"/>	Open	ID	Date	Amount	Refunds	Amount After Refunds	Cycle	Event ID	Event	Payment Method	De-posit-ited
<input checked="" type="checkbox"/>	Open	46...	12/2...	50.00	.00	50.00	Calendar ...	57	2016 - Pled...	Check	<input type="checkbox"/>
<input checked="" type="checkbox"/>	1			50.00	.00	50.00					0

Close out of the matching donor's record.

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

Search Reset New [Match] Contact Contribution SQL

Amount Expected: minimum to maximum
 Unpaid

1. Double-click in the green cell and enter the 'Amount Received'.

Contribution Match List [74 records found]

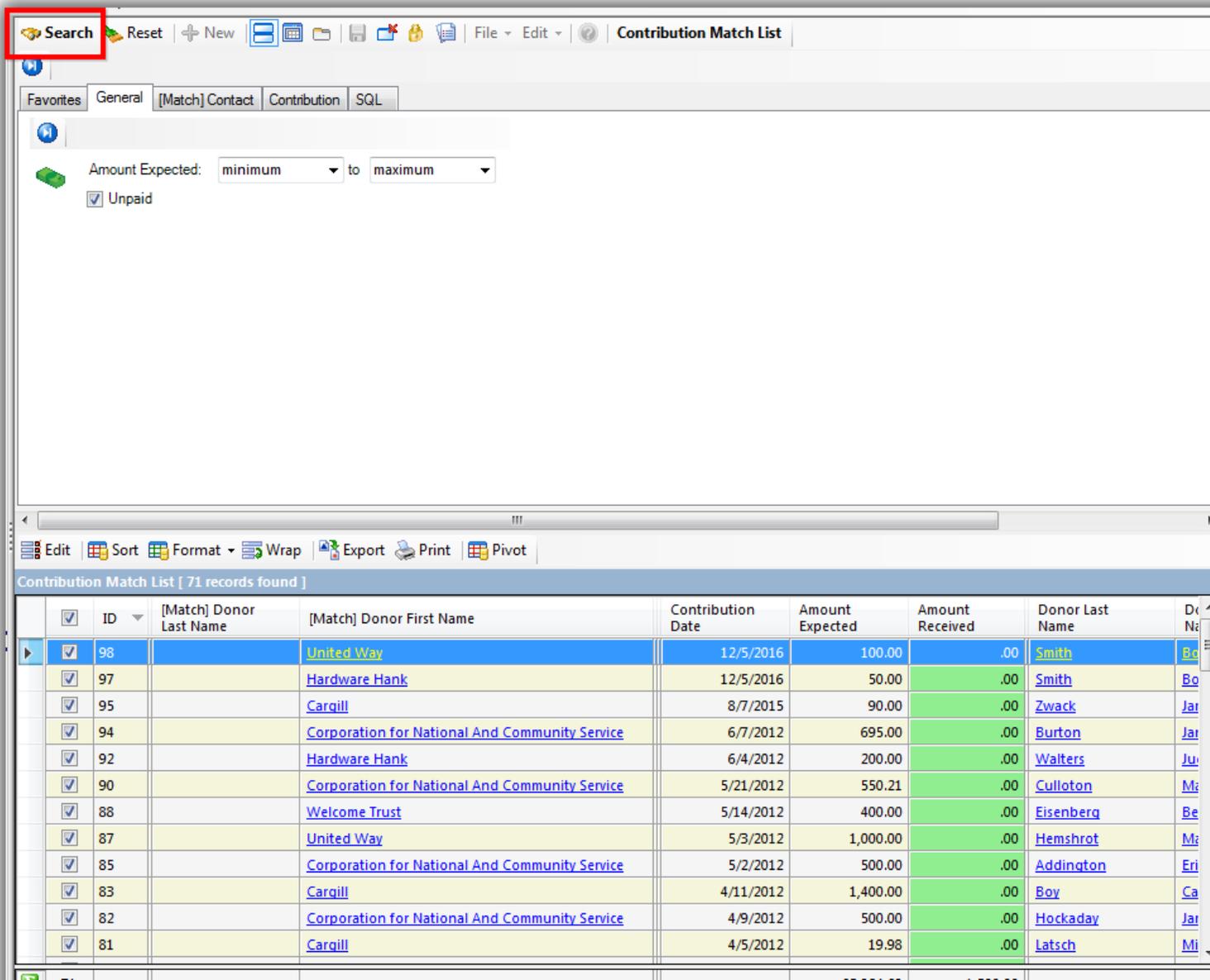
ID	[Match] Donor Last Name	[Match] Donor First Name	Contribution Date	Amount Expected	Amount Received	Donor Last Name	De Na
98	United Way		12/5/2016	100.00	.00	Smith	Bo
97	Hardware Hank		12/5/2016	50.00	.00	Smith	Bo
96	Hormel Foods		12/5/2016	50.00	50.00	Smith	Bo
95	Cargill		8/7/2015	90.00	.00	Zwack	Jar
94	Corporation for National And Community Service		6/7/2012	695.00	.00	Burton	Jar
92	Hardware Hank		6/4/2012	200.00	.00	Walters	Ju
90	Corporation for National And Community Service		5/21/2012	550.21	.00	Culloton	Mi
89	United Way		5/17/2012	650.00	.00	Hemshrot	Mi
88	Welcome Trust		5/14/2012	400.00	.00	Eisenberg	Be
87	United Way		5/3/2012	1,000.00	.00	Hemshrot	Mi
86	Hardware Hank		5/2/2012	75.00	.00	Wambach	Dc
85	Corporation for National And Community Service		5/2/2012	500.00	.00	Addington	Eri
74				66,699.69	1,500.00		

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.



The screenshot shows the 'Contribution Match List' interface. At the top, there is a toolbar with a 'Search' button highlighted in a red box. Below the toolbar, there are tabs for 'Favorites', 'General', '[Match] Contact', 'Contribution', and 'SQL'. The 'General' tab is active, showing filters for 'Amount Expected' (minimum to maximum) and a checked 'Unpaid' checkbox. Below the filters, there is a toolbar with 'Edit', 'Sort', 'Format', 'Wrap', 'Export', 'Print', and 'Pivot' options. The main area displays a table with the following data:

	<input checked="" type="checkbox"/>	ID	[Match] Donor Last Name	[Match] Donor First Name	Contribution Date	Amount Expected	Amount Received	Donor Last Name	De
	<input checked="" type="checkbox"/>	96		United Way	12/5/2016	100.00	.00	Smith	Bo
	<input checked="" type="checkbox"/>	97		Hardware Hank	12/5/2016	50.00	.00	Smith	Bo
	<input checked="" type="checkbox"/>	95		Cargill	8/7/2015	90.00	.00	Zwack	Jar
	<input checked="" type="checkbox"/>	94		Corporation for National And Community Service	6/7/2012	695.00	.00	Burton	Jar
	<input checked="" type="checkbox"/>	92		Hardware Hank	6/4/2012	200.00	.00	Walters	Ju
	<input checked="" type="checkbox"/>	90		Corporation for National And Community Service	5/21/2012	550.21	.00	Culloton	Mi
	<input checked="" type="checkbox"/>	88		Welcome Trust	5/14/2012	400.00	.00	Eisenberg	Be
	<input checked="" type="checkbox"/>	87		United Way	5/3/2012	1,000.00	.00	Hemshrot	Mi
	<input checked="" type="checkbox"/>	85		Corporation for National And Community Service	5/2/2012	500.00	.00	Addington	Eri
	<input checked="" type="checkbox"/>	83		Cargill	4/11/2012	1,400.00	.00	Boy	Ca
	<input checked="" type="checkbox"/>	82		Corporation for National And Community Service	4/9/2012	500.00	.00	Hockaday	Jar
	<input checked="" type="checkbox"/>	81		Cargill	4/5/2012	19.98	.00	Latsch	Mi

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



Trail Blazer™

- 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](#)

Trail Blazer Live Support

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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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