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Overview

This article will teach you how to enter the **tax-deductible** donation **amount** when [recording/updating donations](#). It walks through a few different methods such as:

- Recording it on a **single donation** record
- Setting the tax-deductible **percentage** for a list of donations **en masse**
- How to **batch enter** the data in a list (grid) view utilizing the editable column feature

Outline

#1 Enter the Tax-Deductible Donation Amount into a Single Donation Record

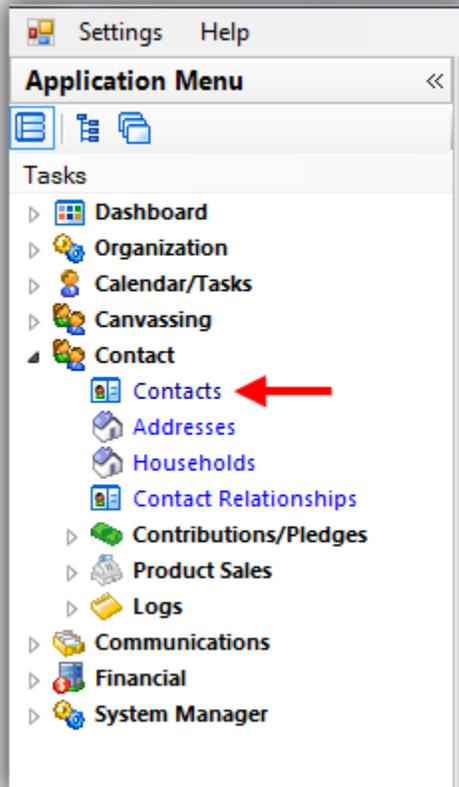
#2 Set a Tax-Deductible Percentage for a List of Donations En Masse

#3 Batch Entering the Tax-Deductible Amount for Donations in the List (Grid) View using Editable Columns

#4 Related Resources

#1 Enter a Tax-Deductible Donation Amount into a Donation Record

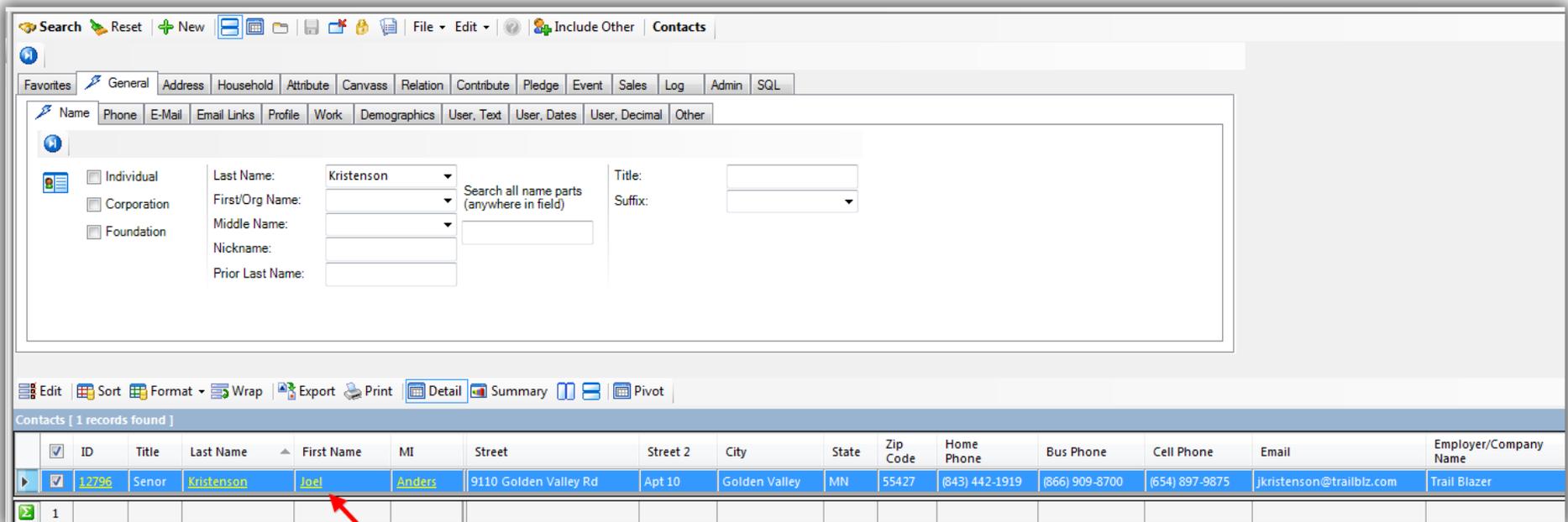
Navigate to the **Contacts** (*Voters/Donors*) list.



[Query](#) for and **open** the donor's record that contains the donation that you want to record a tax-deductible amount for. *In my example I searched for my own record.*

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

Search for and open the donor's record that has the donation in it you want to record a tax-deductible amount for.



Search Reset New Include Other Contacts

Favorites General Address Household Attribute Canvass Relation Contribute Pledge Event Sales Log Admin SQL

Name Phone E-Mail Email Links Profile Work Demographics User, Text User, Dates User, Decimal Other

Individual Last Name: Kristenson Title:
 Corporation First/Org Name: Search all name parts (anywhere in field) Suffix:
 Foundation Middle Name:
Nickname:
Prior Last Name:

Edit Sort Format Wrap Export Print Detail Summary Pivot

Contacts [1 records found]

<input checked="" type="checkbox"/>	ID	Title	Last Name	First Name	MI	Street	Street 2	City	State	Zip Code	Home Phone	Bus Phone	Cell Phone	Email	Employer/Company Name
<input checked="" type="checkbox"/>	12796	Senior	Kristenson	Joel	Anders	9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427	(843) 442-1919	(866) 909-8700	(654) 897-9875	jkristenson@trailblz.com	Trail Blazer

Click on the donor's name to open their record card.

Navigate to the **Contribute** tab and **open** the donation record you want to record a tax-deductible amount for. *In my example I selected a \$1,500 donation made on 4/6/2012.*

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

File Edit X [Icons] Joel Anders Kristenson [12796]

Title: Senior
First Name: Joel
Middle Name: Anders
Last Name/Suffix: Kristenson
Prior Last Name:
Nickname: Senior Pepé
Contact Type: Individual



Home Address:
 9110 Golden Valley Rd
 Apt 10
 Beware of cats (street 3 merge field)
 Golden Valley, MN 55427
 847-447-1919

Email: jkristenson@trailblz.com
Work Address: No Address

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

New Refresh Sort Format Wrap Export Print Pivot

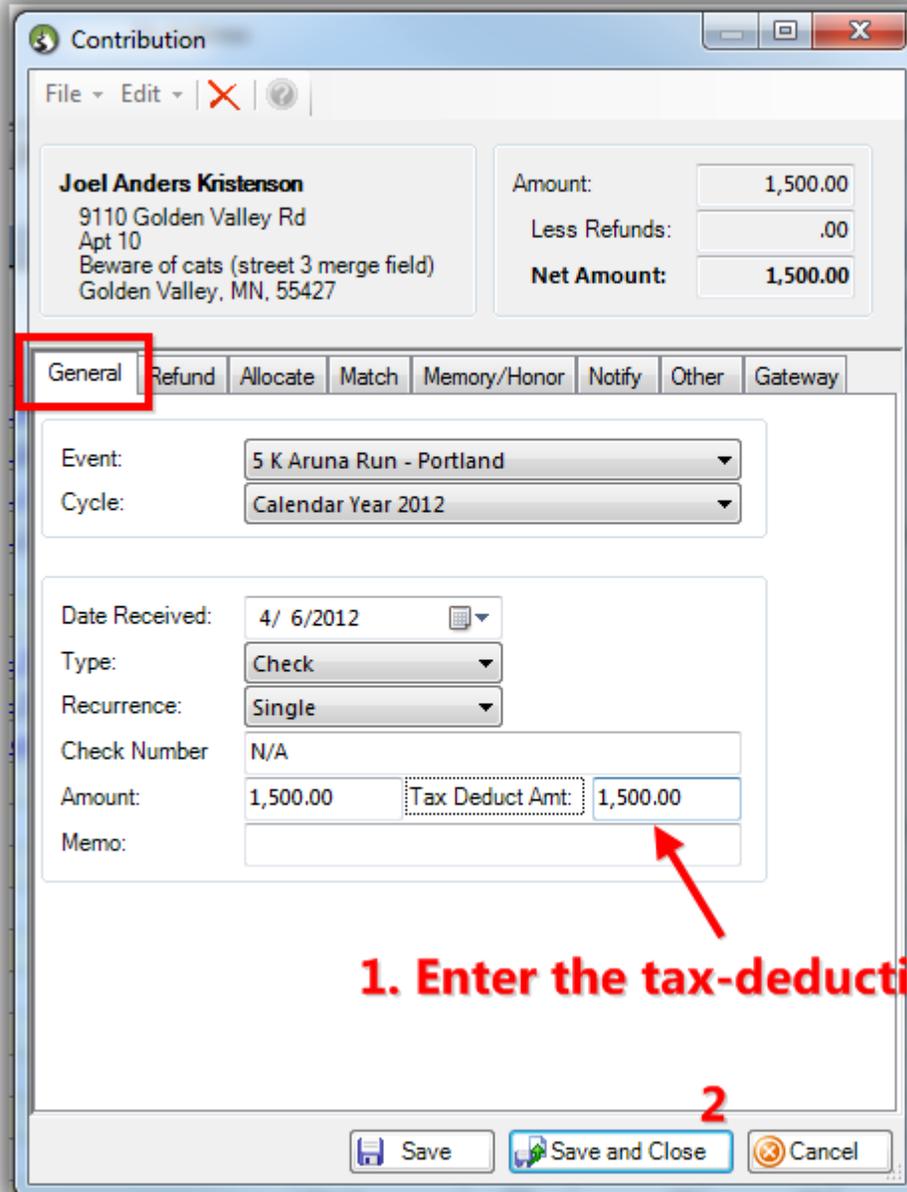
Contributions [125 records found]

<input checked="" type="checkbox"/>	Open	Date	Amount After Refunds	Cycle	Event	Payment Method	De-posit-ited	Applied Against Pledges	Matches Expected	Allocated to Specific Funds	Memorial/ Honorarium Type	Memorial/ Honorarium Person
<input checked="" type="checkbox"/>	Open	8/12/2014	2,965.00	Calendar Year 2014	2016 Celebrity Golf Tournament	Credit Card	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	8/12/2014	265.00	Calendar Year 2014	2016 Celebrity Golf Tournament	Credit Card	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	7/30/2014	50.00	Calendar Year 2014	Internal Event - Donations via Social M...	Credit Card	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	7/30/2014	65,000.25	Calendar Year 2014	Internal Event - Donations via Social M...	Credit Card	<input type="checkbox"/>	.00	.00	65,000.25		
<input checked="" type="checkbox"/>	Open	7/28/2014	200.00	Calendar Year 2014		Credit Card	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	6/6/2014	68.25	Calendar Year 2014		Credit Card	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	5/23/2014	2,308.50	Calendar Year 2014	Blazing Trails - The King's Trail - (5/15/2...	Credit Card	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	5/19/2014	2,308.50	Calendar Year 2014	Blazing Trails - The King's Trail - (5/15/2...	Credit Card	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	5/8/2014	100.00	Calendar Year 2014	21st Annual Golf Tournament	Credit Card	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	5/8/2014	160.00	Calendar Year 2014		Credit Card	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	5/1/2014	1,000.00	Calendar Year 2014		Check	<input type="checkbox"/>	.00	.00	1,000.00		
<input checked="" type="checkbox"/>	Open	9/27/2013	20.00	Calendar Year 2013		Cash	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	9/23/2013	250.50	Calendar Year 2013		Credit Card	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	9/1/2013	500.00	Calendar Year 2013		Cash	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	8/23/2013	250.50	Calendar Year 2013		Credit Card	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	8/2/2013	250.50	Calendar Year 2013		Credit Card	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	7/22/2013	250.50	Calendar Year 2013		Credit Card	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	7/17/2013	50.00	Calendar Year 2013		Credit Card	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	7/15/2013	250.50	Calendar Year 2013		Credit Card	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	7/15/2013	100.00	Calendar Year 2013		Check	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	7/9/2013	250.50	Calendar Year 2013		Credit Card	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	7/2/2013	250.50	Calendar Year 2013		Credit Card	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	5/6/2013	100.00	Calendar Year 2013		Credit Card	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	1/17/2013	5,000.00	Calendar Year 2013		Check	<input type="checkbox"/>	.00	.00	.00		
<input checked="" type="checkbox"/>	Open	4/6/2012	1,500.00	Calendar Year 2012		Check	<input type="checkbox"/>	.00	.00	.00		

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

Under the **General** tab you can fill in the '**tax-deductible amount**', and then click **[Save and Close]**. *My example is below where I entered the full amount as tax-deductible.*

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage



Contribution

File Edit X

Joel Anders Kristenson
9110 Golden Valley Rd
Apt 10
Beware of cats (street 3 merge field)
Golden Valley, MN, 55427

Amount: 1,500.00
Less Refunds: .00
Net Amount: 1,500.00

General Refund Allocate Match Memory/Honor Notify Other Gateway

Event: 5 K Aruna Run - Portland
Cycle: Calendar Year 2012

Date Received: 4/ 6/2012
Type: Check
Recurrence: Single
Check Number: N/A
Amount: 1,500.00 Tax Deduct Amt: 1,500.00
Memo:

1. Enter the tax-deductible amount.

2

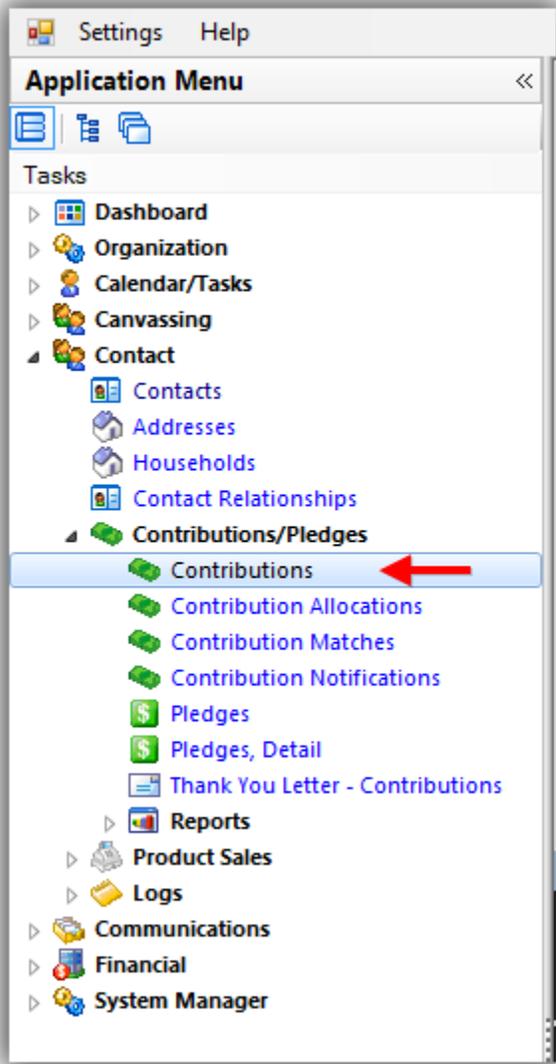
Save Save and Close Cancel

The next section will show how to **mass update** a list of donations with a set tax-deductible percentage (*either full, partial, or zero*).

#2 Set a Tax-Deductible Percentage for a List of Donations En Masse

Navigate to the **Contributions** list.

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

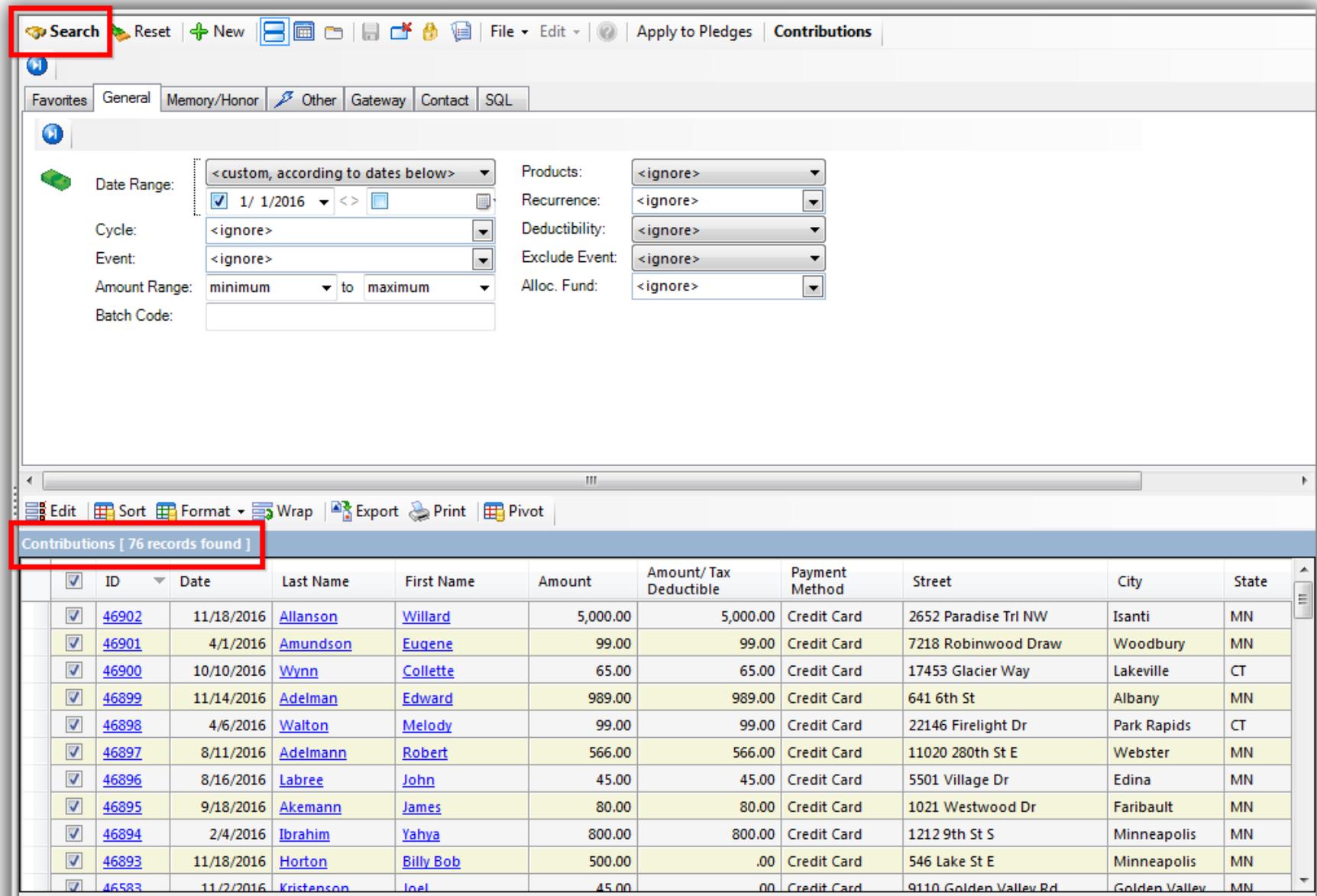


Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

Build and run your [search query](#) for the donations you want to update the tax-deductible amount for. *In my example I populated all credit card donations for 2016 which produced **76** results (as of the time this article was written, online donations will have a tax-deductible amount of zero).*

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

Build and run your search query for the donation records you want to mass update the tax-deductible amount for. In this example it was all credit card donations for 2016.

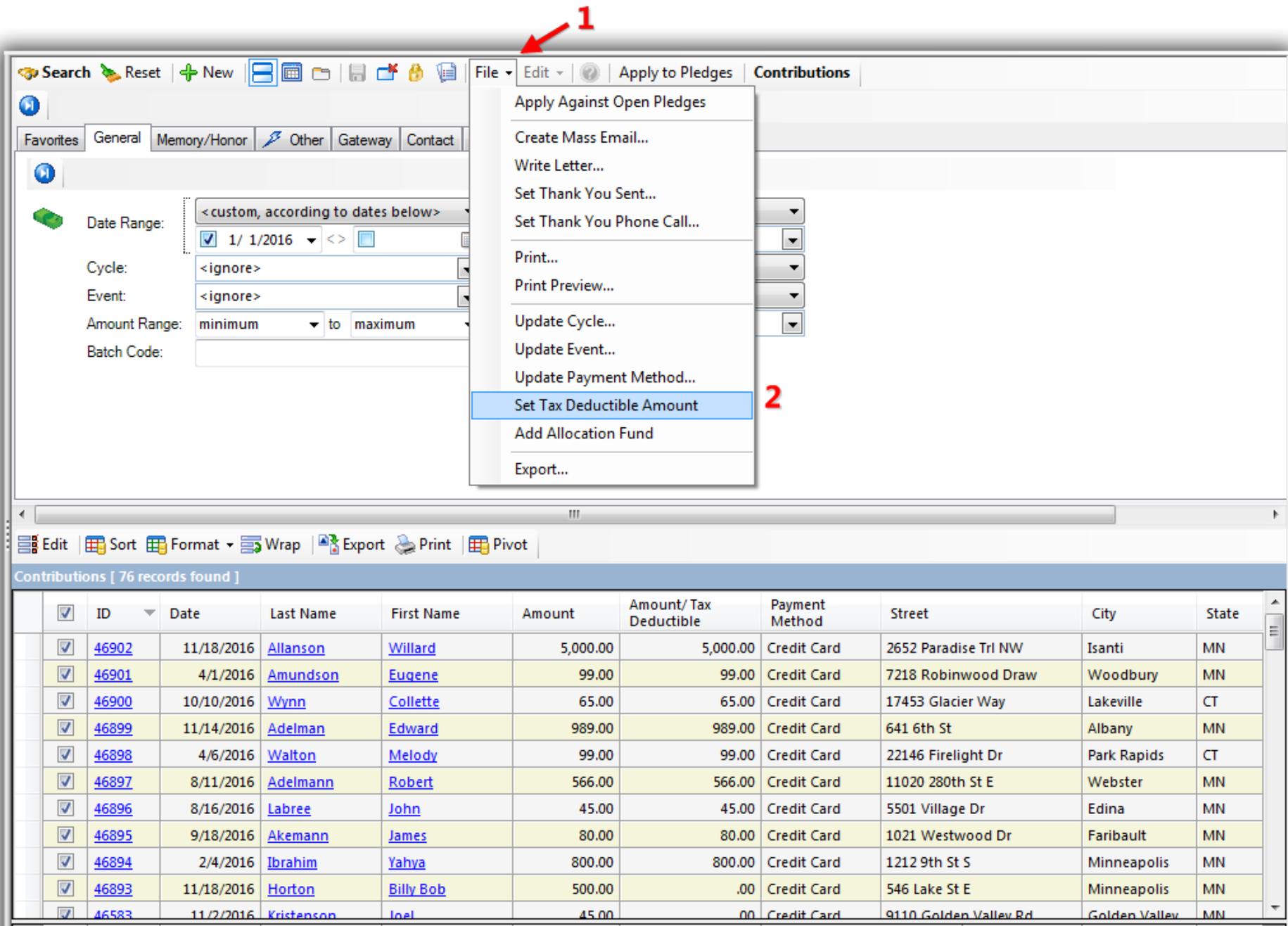


The screenshot shows the TrailBlazer interface with search filters set for 2016 credit card donations. The 'Search' button is highlighted with a red box. Below the filters, a table displays the search results, with the 'results' label also highlighted in red. The table has 12 columns: ID, Date, Last Name, First Name, Amount, Amount/Tax Deductible, Payment Method, Street, City, and State. The first few rows are highlighted in yellow.

ID	Date	Last Name	First Name	Amount	Amount/Tax Deductible	Payment Method	Street	City	State
46902	11/18/2016	Allanson	Willard	5,000.00	5,000.00	Credit Card	2652 Paradise Trl NW	Isanti	MN
46901	4/1/2016	Amundson	Eugene	99.00	99.00	Credit Card	7218 Robinwood Draw	Woodbury	MN
46900	10/10/2016	Wynn	Collette	65.00	65.00	Credit Card	17453 Glacier Way	Lakeville	CT
46899	11/14/2016	Adelman	Edward	989.00	989.00	Credit Card	641 6th St	Albany	MN
46898	4/6/2016	Walton	Melody	99.00	99.00	Credit Card	22146 Firelight Dr	Park Rapids	CT
46897	8/11/2016	Adelmann	Robert	566.00	566.00	Credit Card	11020 280th St E	Webster	MN
46896	8/16/2016	Labree	John	45.00	45.00	Credit Card	5501 Village Dr	Edina	MN
46895	9/18/2016	Akemann	James	80.00	80.00	Credit Card	1021 Westwood Dr	Faribault	MN
46894	2/4/2016	Ibrahim	Yahya	800.00	800.00	Credit Card	1212 9th St S	Minneapolis	MN
46893	11/18/2016	Horton	Billy Bob	500.00	.00	Credit Card	546 Lake St E	Minneapolis	MN
46583	11/2/2016	Kristenson	Joel	45.00	.00	Credit Card	9110 Golden Valley Rd	Golden Valley	MN

Click **File > Set Tax Deductible Amount.**

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

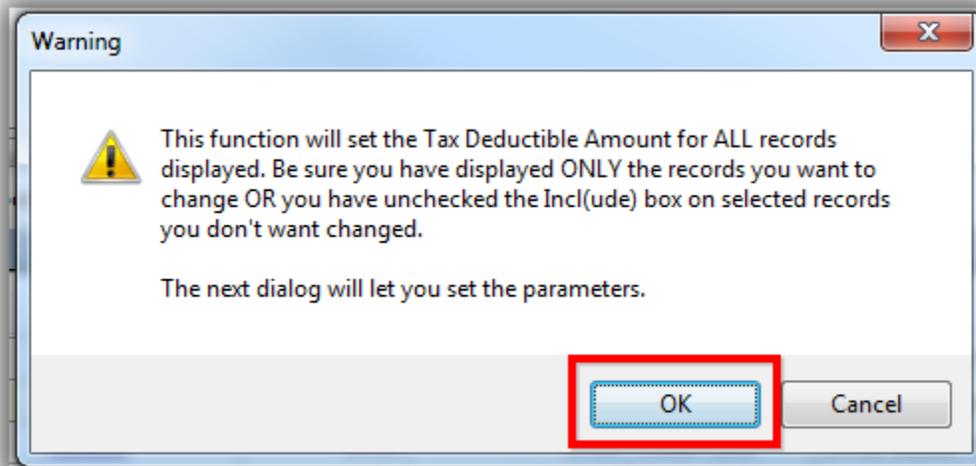


The screenshot shows the TrailBlazer software interface. The 'File' menu is open, and the 'Set Tax Deductible Amount' option is highlighted. A red arrow labeled '1' points to the 'File' menu, and a red number '2' is next to the highlighted option.

Contributions [76 records found]

ID	Date	Last Name	First Name	Amount	Amount/ Tax Deductible	Payment Method	Street	City	State
46902	11/18/2016	Allanson	Willard	5,000.00	5,000.00	Credit Card	2652 Paradise Trl NW	Isanti	MN
46901	4/1/2016	Amundson	Eugene	99.00	99.00	Credit Card	7218 Robinwood Draw	Woodbury	MN
46900	10/10/2016	Wynn	Collette	65.00	65.00	Credit Card	17453 Glacier Way	Lakeville	CT
46899	11/14/2016	Adelman	Edward	989.00	989.00	Credit Card	641 6th St	Albany	MN
46898	4/6/2016	Walton	Melody	99.00	99.00	Credit Card	22146 Firelight Dr	Park Rapids	CT
46897	8/11/2016	Adelmann	Robert	566.00	566.00	Credit Card	11020 280th St E	Webster	MN
46896	8/16/2016	Labree	John	45.00	45.00	Credit Card	5501 Village Dr	Edina	MN
46895	9/18/2016	Akemann	James	80.00	80.00	Credit Card	1021 Westwood Dr	Faribault	MN
46894	2/4/2016	Ibrahim	Yahya	800.00	800.00	Credit Card	1212 9th St S	Minneapolis	MN
46893	11/18/2016	Horton	Billy Bob	500.00	.00	Credit Card	546 Lake St E	Minneapolis	MN
46583	11/2/2016	Kristenson	Joel	45.00	.00	Credit Card	9110 Golden Valley Rd	Golden Valley	MN

Click **[OK]** to proceed.



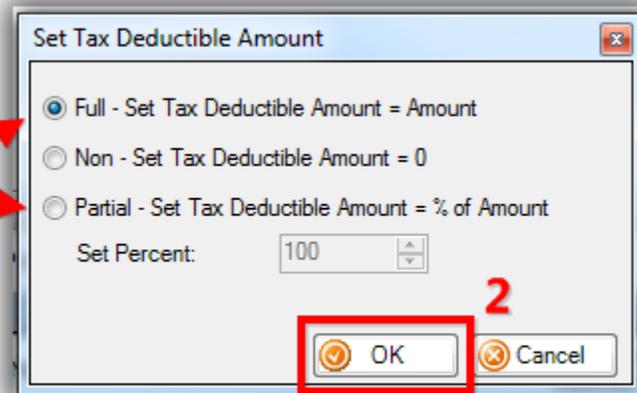
You now have **3** options for setting the **Tax Deductible Amount**:

- **Full** – Set Tax Deductible Amount = Amount
- **Non** – Set Tax Deductible Amount = 0
- **Partial** – Set Tax Deductible Amount = % of Amount (then choose the percentage)

In this *example* I updated the amount to 100% for all donations in my list. Click **[OK]** to proceed after selecting your preference.

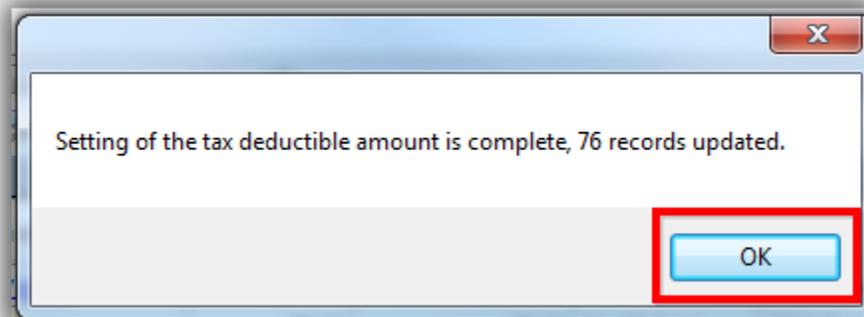
Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

1. Select your preference.



After the process is finished you'll get a notification with the results, click [OK] to finish.

You'll get a notification with the results after the process is complete.



If you [format](#) in the **Amount Tax/Deductible** column into the grid you can verify the results. *My finished example is below.*

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

Search | Reset | New | [Icons] | File | Edit | Apply to Pledges | **Contributions**

Favorites | General | Memory/Honor | Other | Gateway | Contact | SQL

Date Range: <custom, according to dates below> | Products: <ignore>
 1/ 1/2016 | Recurrence: <ignore>
 Cycle: <ignore> | Deductibility: <ignore>
 Event: <ignore> | Exclude Event: <ignore>
 Amount Range: minimum to maximum | Alloc. Fund: <ignore>
 Batch Code: []

You can format this column into the grid to verify the amounts are correct after running your mass update.

Edit | Sort | Format | Wrap | Export | Print | Pivot

Contributions [76 records found]

ID	Date	Last Name	First Name	Amount	Amount/ Tax Deductible	Payment Method	Street	City	State
46902	11/18/2016	Allanson	Willard	5,000.00	5,000.00	Credit Card	2652 Paradise Trl NW	Isanti	MN
46901	4/1/2016	Amundson	Eugene	99.00	99.00	Credit Card	7218 Robinwood Draw	Woodbury	MN
46900	10/10/2016	Wynn	Collette	65.00	65.00	Credit Card	17453 Glacier Way	Lakeville	CT
46899	11/14/2016	Adelman	Edward	989.00	989.00	Credit Card	641 6th St	Albany	MN
46898	4/6/2016	Walton	Melody	99.00	99.00	Credit Card	22146 Firelight Dr	Park Rapids	CT
46897	8/11/2016	Adelmann	Robert	566.00	566.00	Credit Card	11020 280th St E	Webster	MN
46896	8/16/2016	Labree	John	45.00	45.00	Credit Card	5501 Village Dr	Edina	MN
46895	9/18/2016	Akemann	James	80.00	80.00	Credit Card	1021 Westwood Dr	Faribault	MN
46894	2/4/2016	Ibrahim	Yahya	800.00	800.00	Credit Card	1212 9th St S	Minneapolis	MN
46893	11/18/2016	Horton	Billy Bob	500.00	500.00	Credit Card	546 Lake St E	Minneapolis	MN
46583	11/2/2016	Kristenson	Joel	45.00	45.00	Credit Card	9110 Golden Valley Rd	Golden Valley	MN
76				6,246,279.15	6,246,279.15				

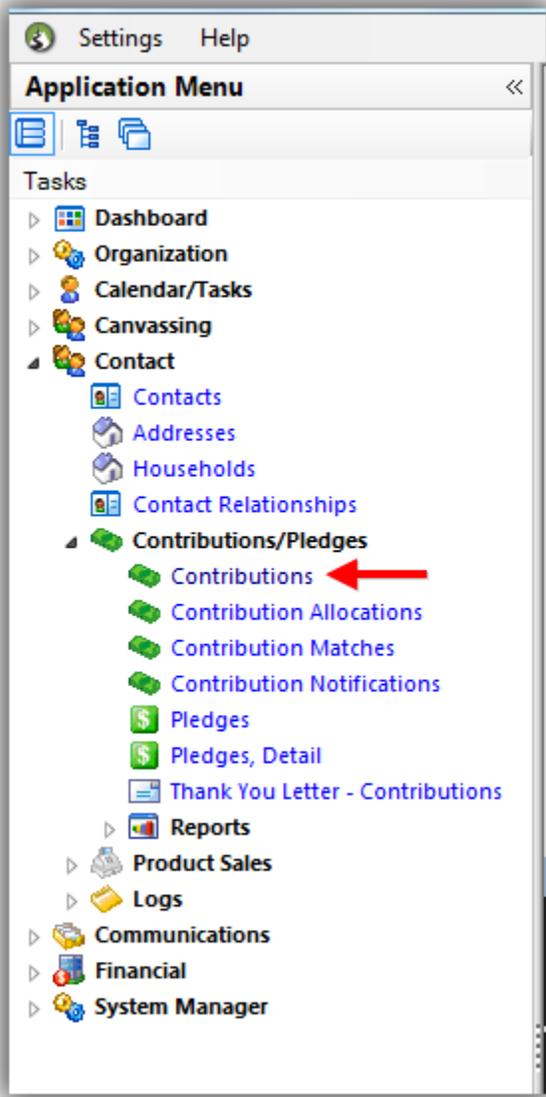
If a mistake was made you can usually [roll-it-back](#) if you catch it in time.

The next section will show how to modify the tax-deductible amount in the **'grid/list'** view by adding in the necessary columns and making them **'updatable'**.

#3 Batch Entering the Tax-Deductible Amount for Donations in the List (Grid) View using Editable Columns

Navigate to the **Contributions** list under the **Application Menu**.

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage



Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

Build and run your [search query](#). *In this example I populated all credit card contribution records for 2015 which produced 656 donation records.*

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

Search | Reset | New | [Icons] | File | Edit | Apply to Pledges | Contributions

Favorites | General | Memory/Honor | Other | Gateway | Contact | SQL

Payment Methods: Credit Card | Thank You Letter: <ignore>
 Use Type: <ignore> | Thank You Call: <ignore>
 Memo: | Earmarked: <ignore>
 Check Number: | In-Kind Type: <ignore>
 Anonymous: <ignore> | Bundler: <ignore>

Build and run you search query for the donation records you want to update the tax-deductible amount for.

In this example it was all donations in 2015 that were made by credit card.

Edit | Sort | Format | Wrap | Export | Print | Pivot

Contributions [656 records found] results

<input type="checkbox"/>	ID	Date	Contact ID	Last Name	First Name	MI	Amount	Applied Against Pledges	Open Pledges [Per Contact]	Deposited	Thank You Letter Sent	Thank You Date	Thank You Call Done	Check #	Street	Street 2	City	State	Zip Code	Deposit Date	Cycle ID	Cycle	Payment Method	Recu Type
<input checked="" type="checkbox"/>	46487	11/23/2015	14780	Daigle	Jazz		175.00	.00	5,000.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>		1800 Baptist World Ce...		Nashville	TN	37207		28	Calendar Year 2015	Credit Card	
<input checked="" type="checkbox"/>	46485	11/23/2015	14779	Wagner	Anthony		15.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>		10101 Fondren Rd	Suite 222	Houston	TX	77096		28	Calendar Year 2015	Credit Card	
<input checked="" type="checkbox"/>	46483	11/20/2015	14778	Caryl	Alysia		145.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>		390 Ashton Ave		San Francisco	CA	94112		28	Calendar Year 2015	Credit Card	
<input checked="" type="checkbox"/>	46482	11/20/2015	14777	Unknown	Abigail		175.43	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>		123 Main St		Eugene	OR	123456		28	Calendar Year 2015	Credit Card	
<input checked="" type="checkbox"/>	46480	11/18/2015	14775	Wheelock	Alex		1,000.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>		1705 Highway 59	Suite 11	Mandeville	LA	70448		28	Calendar Year 2015	Credit Card	
<input checked="" type="checkbox"/>	46479	11/12/2015	14774	Ferguson	Ashley		147.55	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>		1701 Shackelford Rd S		Little Rock	AR	72211		28	Calendar Year 2015	Credit Card	
<input checked="" type="checkbox"/>	46478	11/12/2015	14773	Caplan	Neil		145.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>		PO Box 843		Glenham	NY	12527		28	Calendar Year 2015	Credit Card	
<input checked="" type="checkbox"/>	46477	11/12/2015	14772	Nelson	Amber		123.56	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>		PO Box 85		Oakley	UT	84055		28	Calendar Year 2015	Credit Card	
<input checked="" type="checkbox"/>	46475	11/11/2015	14770	Crum	Caitlyn		145.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>		425 Sugar Maple Ln		Marion	OH	43302		28	Calendar Year 2015	Credit Card	
<input checked="" type="checkbox"/>	46473	11/10/2015	14768	Ozorkiewicz	Melodie		145.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>		PO Box 101104		Fort Worth	TX	76185		28	Calendar Year 2015	Credit Card	
<input checked="" type="checkbox"/>	46472	11/9/2015	14767	McMahon	Cory		145.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>		2151 59th St		St Louis	MO	63110		28	Calendar Year 2015	Credit Card	
<input checked="" type="checkbox"/>	46471	11/5/2015	14766	Jentgen	Julie		24.57	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>		158 Sleep Bowl Rd		Chandler	AZ	85286		28	Calendar Year 2015	Credit Card	
<input checked="" type="checkbox"/>	46469	11/4/2015	14765	Platt	Kevin		1,000.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>		1256 Landmark Trl S		Hopkins	MN	55343		28	Calendar Year 2015	Credit Card	
<input checked="" type="checkbox"/>	46468	11/4/2015	14764	Gray	Damian		145.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>		5330 Technology Ln		Birmingham	AL	35210		28	Calendar Year 2015	Credit Card	
<input checked="" type="checkbox"/>	46467	11/4/2015	14763	Broughton	Catherine		145.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>		2510 Mills Branch Dr	Apt 140	Humble	TX	77345		28	Calendar Year 2015	Credit Card	
<input checked="" type="checkbox"/>	46466	11/4/2015	14762	Miller	Derek		145.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>		3050 K St NW	Suite 350	Washington	DC	20007		28	Calendar Year 2015	Credit Card	
<input checked="" type="checkbox"/>	46465	11/4/2015	14762	Miller	Derek		145.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>		3050 K St NW	Suite 350	Washington	DC	20007		28	Calendar Year 2015	Credit Card	
<input checked="" type="checkbox"/>	46462	11/3/2015	14761	Rice	Donald		145.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>		349 Plato Pl		Middletown	DE	19709		28	Calendar Year 2015	Credit Card	
<input checked="" type="checkbox"/>	46447	11/2/2015	14760	Buzard	Ron		145.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>		2500 Valleyhigh		Rochester	MN	55901		28	Calendar Year 2015	Credit Card	
<input checked="" type="checkbox"/>	46445	11/2/2015	14759	Barstad	Caitlyn		145.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>		56 Nor-nan Rd		Winchester	TN	37398		28	Calendar Year 2015	Credit Card	
<input checked="" type="checkbox"/>	46384	10/28/2015	14758	Urthva	Anastasiv		145.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>		2016 Anniston Rd		Jacksonville	OR	32246		28	Calendar Year 2015	Credit Card	
<input checked="" type="checkbox"/>	656						147,370...	.00	5,000.00	0	656		0								18368			

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

Click the **[Format]** drop-down and select **Columns**.

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

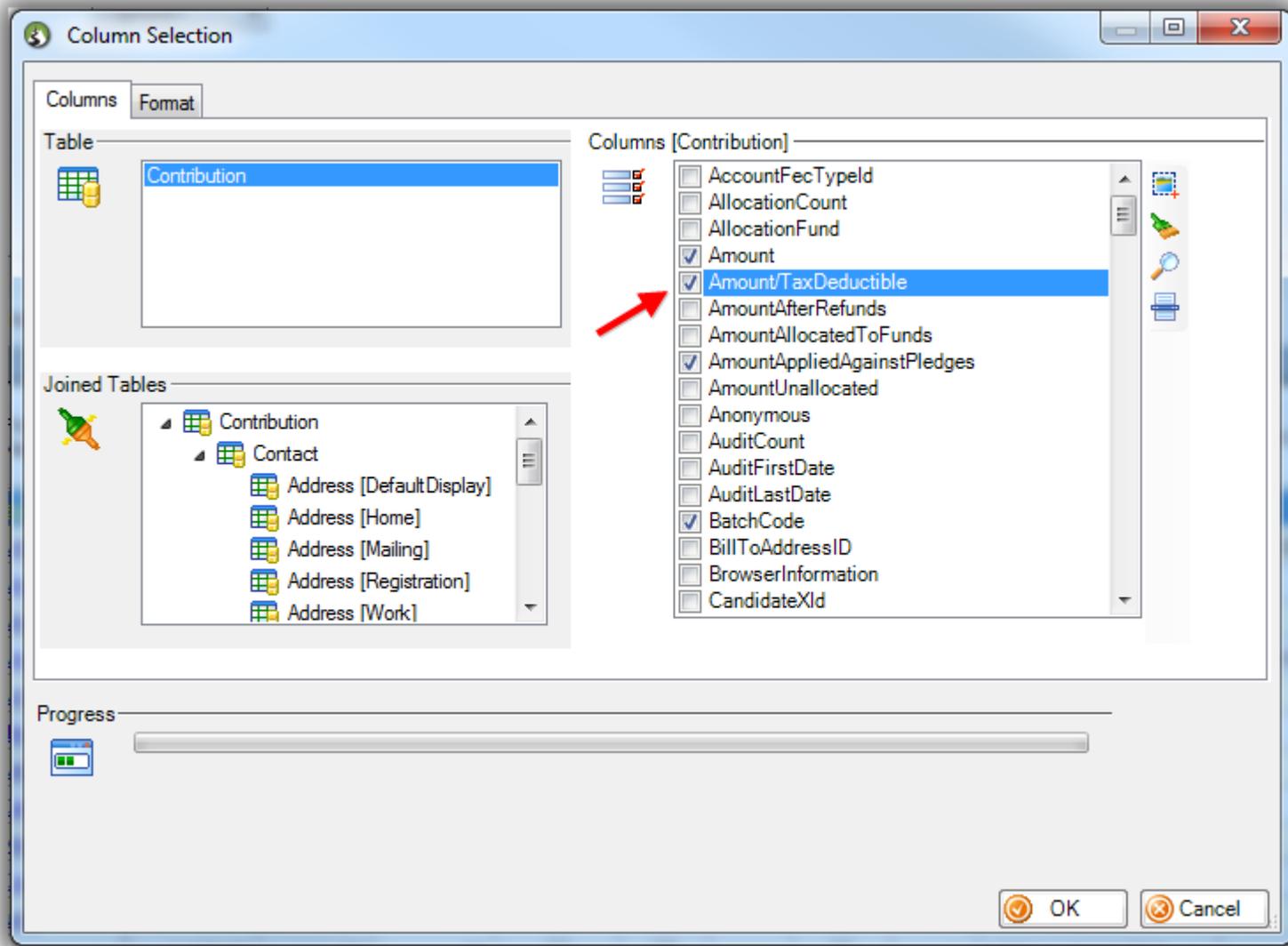
Payment Methods: Credit Card
 Use Type: <ignore>
 Memo:
 Check Number:
 Anonymous: <ignore>
 Thank You Letter: <ignore>
 Thank You Call: <ignore>
 Earmarked: <ignore>
 In-Kind Type: <ignore>
 Bundler: <ignore>

ID	First Name	Amount	Applied Against	Open Pledges IPer	Deposited	Thank You Letter Sent	Thank You Date	Thank You Call Done	Check #	Street
46487	Jazz	175.00	.00	5,000.00		<input checked="" type="checkbox"/>		<input type="checkbox"/>		1800 Baptist World Ce...
46485	Anthony	15.00	.00	.00		<input checked="" type="checkbox"/>		<input type="checkbox"/>		10101 Fondren Rd
46483	Alysia	145.00	.00	.00		<input checked="" type="checkbox"/>		<input type="checkbox"/>		390 Ashton Ave
46482	Abigail	175.43	.00	.00		<input checked="" type="checkbox"/>		<input type="checkbox"/>		123 Main St
46480	Alex	1,000.00	.00	.00		<input checked="" type="checkbox"/>		<input type="checkbox"/>		1705 Highway 59
46479	Ashley	147.55	.00	.00		<input checked="" type="checkbox"/>		<input type="checkbox"/>		1701 Shackleford Rd S
46478	Neil	145.00	.00	.00		<input checked="" type="checkbox"/>		<input type="checkbox"/>		PO Box 843

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

Check the box on the right for '**Amount/TaxDeductible**'. *This is the step that will add that column into the list (grid).*

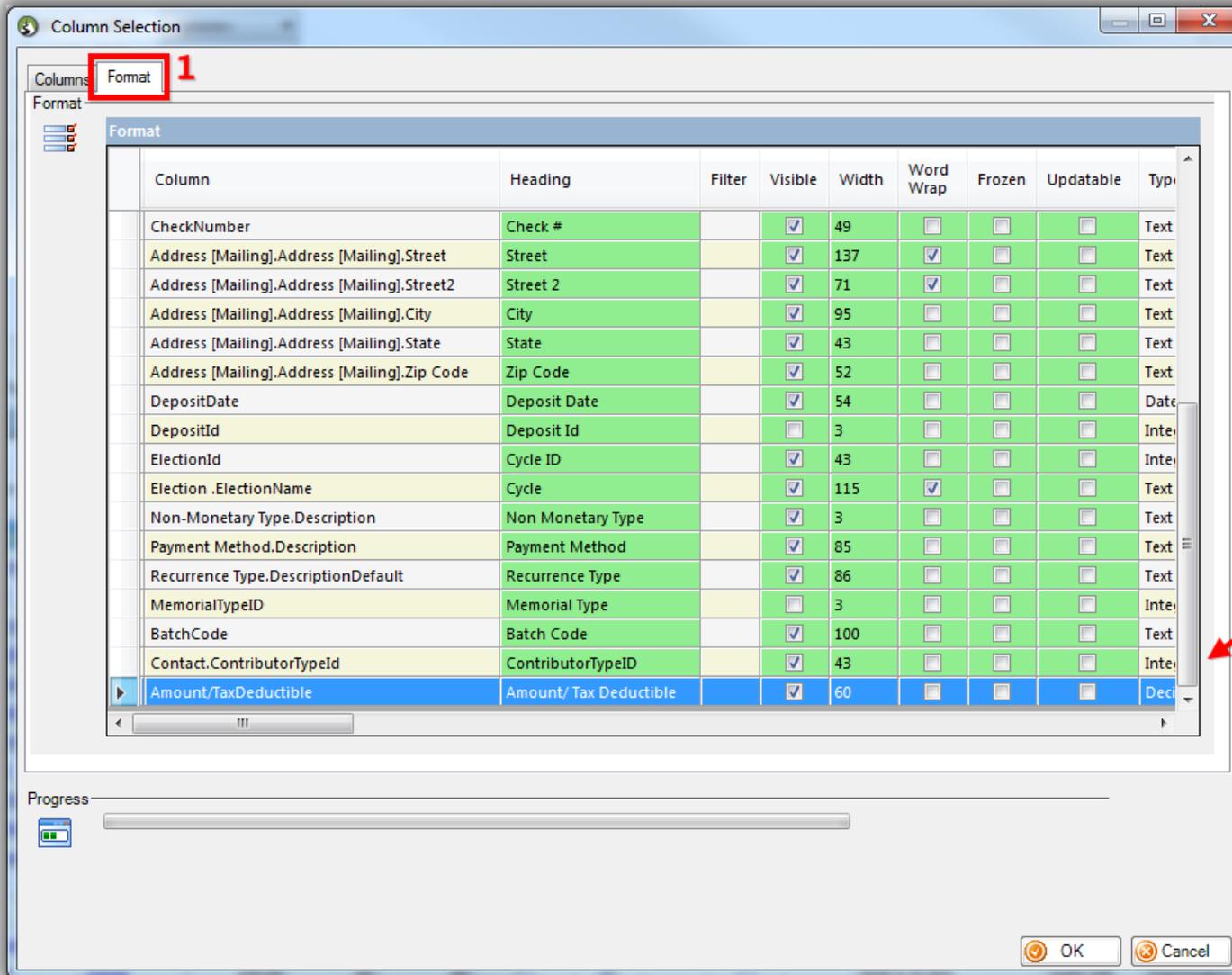
Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage



Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

Navigate to the **Format** tab and scroll to the bottom of the list.

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage



Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

Scroll to the **right** until you see the column called **Updatable**. Check this box for the **Amount/TaxDeductible** row and click **[OK]**.

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

Column Selection

Columns | Format

Format

Column	Heading	Filter	Word Wrap	Frozen	Updatable	Type	Subtype
CheckNumber	Check #		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Text	
Address [Mailing].Address [Mailing].Street	Street		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Text	
Address [Mailing].Address [Mailing].Street2	Street 2		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Text	
Address [Mailing].Address [Mailing].City	City		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Text	
Address [Mailing].Address [Mailing].State	State		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Text	
Address [Mailing].Address [Mailing].Zip Code	Zip Code		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Text	
DepositDate	Deposit Date		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DateTime	
DepositId	Deposit Id		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Integer	
ElectionId	Cycle ID		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Integer	
Election .ElectionName	Cycle		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Text	
Non-Monetary Type.Description	Non Monetary Type		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Text	
Payment Method.Description	Payment Method		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Text	
Recurrence Type.DescriptionDefault	Recurrence Type		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Text	
MemorialTypeID	Memorial Type		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Integer	
BatchCode	Batch Code		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Text	
Contact.ContributorTypeID	ContributorTypeID		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Integer	
Amount/TaxDeductible	Amount/ Tax Deductible		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Decimal	

1

2

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

Scroll out to the far right of the **grid** where the new tax-deductible amount column will display.

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

Search Reset + New [Icons] File Edit Apply to Pledges Contributions

Favorites General Memory/Honor Other Gateway Contact SQL

Payment Methods: Credit Card Thank You Letter: <ignore>
 Use Type: <ignore> Thank You Call: <ignore>
 Memo: Earmarked: <ignore>
 Check Number: In-Kind Type: <ignore>
 Anonymous: <ignore> Bundler: <ignore>

Contributions [656 records found]

ID	Date	Contact ID	Last Name	First Name	Code	Deposit Date	Cycle ID	Cycle	Payment Method	Recurrence Type	Batch Code	Cont	Amount/ Tax Deductibl
46487	11/23/2015	14780	Daigle	Jazz	207		28	Calendar Year 2015	Credit Card		20151124-from-...	1	.00
46485	11/23/2015	14779	Wagner	Anthony	096		28	Calendar Year 2015	Credit Card		20151124-from-...	1	.00
46483	11/20/2015	14778	Caryl	Alysia	112		28	Calendar Year 2015	Credit Card		20151124-from-...	1	.00
46482	11/20/2015	14777	Unknown	Abigail	3456		28	Calendar Year 2015	Credit Card		20151124-from-...	1	.00
46480	11/18/2015	14775	Wheelock	Alex	448		28	Calendar Year 2015	Credit Card		20151124-from-...	1	.00
46479	11/12/2015	14774	Ferguson	Ashley	211		28	Calendar Year 2015	Credit Card		20151124-from-...	1	.00
46478	11/12/2015	14773	Caplan	Neil	527		28	Calendar Year 2015	Credit Card		20151124-from-...	1	.00
46477	11/12/2015	14772	Nelson	Amber	055		28	Calendar Year 2015	Credit Card		20151124-from-...	1	.00
46475	11/11/2015	14770	Crum	Caitlyn	302		28	Calendar Year 2015	Credit Card		20151124-from-...	1	.00
46473	11/10/2015	14768	Ozorkiewicz	Melodie	185		28	Calendar Year 2015	Credit Card		20151124-from-...	1	.00
46472	11/9/2015	14767	McMahon	Cory	110		28	Calendar Year 2015	Credit Card		20151124-from-...	1	.00
46471	11/5/2015	14766	Jentaen	Julie	286		28	Calendar Year 2015	Credit Card		20151124-from-...	1	.00
656							18368						.00

Logon = Joel Kristenson Save Save and Close Reports + New Close

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

Click-and-hold on the **column title** and **drag it** to the left until it's next to the Amount column, then release it to complete the move. *In my example I also removed columns I wasn't interested in via [formatting](#).*

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

Search Reset New [Icons] File Edit Apply to Pledges Contributions

Favorites General Memory/Honor Other Gateway Contact SQL

Payment Methods: Credit Card Thank You Letter: <ignore>
 Use Type: <ignore> Thank You Call: <ignore>
 Memo: Earmarked: <ignore>
 Check Number: In-Kind Type: <ignore>
 Anonymous: <ignore> Bundler: <ignore>

Click and drag this column to the left so it's next to the 'Amount' column.

Edit Sort Format Wrap Export Print Pivot

Contributions [656 records found]

<input checked="" type="checkbox"/>	Date	Last Name	First Name	Amount	Street	Street 2	City	State	Zip Code	Payment Method	Recurrence Type	Amount/ Tax Deductible
<input checked="" type="checkbox"/>	11/23/2015	Daigle	Jazz	175.00	1800 Baptist World Ce...		Nashville	TN	37207	Credit Card		.00
<input checked="" type="checkbox"/>	11/23/2015	Wagner	Anthony	15.00	10101 Fondren Rd	Suite 222	Houston	TX	77096	Credit Card		.00
<input checked="" type="checkbox"/>	11/20/2015	Caryl	Alysia	145.00	390 Ashton Ave		San Francisco	CA	94112	Credit Card		.00
<input checked="" type="checkbox"/>	11/20/2015	Unknown	Abigail	175.43	123 Main St		Eugene	OR	123456	Credit Card		.00
<input checked="" type="checkbox"/>	11/18/2015	Wheelock	Alex	1,000.00	1705 Highway 59	Suite 11	Mandeville	LA	70448	Credit Card		.00
<input checked="" type="checkbox"/>	11/12/2015	Ferguson	Ashley	147.55	1701 Shackelford Rd S		Little Rock	AR	72211	Credit Card		.00
<input checked="" type="checkbox"/>	11/12/2015	Caplan	Neil	145.00	PO Box 843		Glenham	NY	12527	Credit Card		.00
<input checked="" type="checkbox"/>	11/12/2015	Nelson	Amber	123.56	PO Box 85		Oakley	UT	84055	Credit Card		.00
<input checked="" type="checkbox"/>	11/11/2015	Crum	Caitlyn	145.00	425 Sugar Maple Ln		Marion	OH	43302	Credit Card		.00
<input checked="" type="checkbox"/>	11/10/2015	Ozorkiewicz	Melodie	145.00	PO Box 101104		Fort Worth	TX	76185	Credit Card		.00
<input checked="" type="checkbox"/>	11/9/2015	McMahon	Cory	145.00	2151 59th St		St Louis	MO	63110	Credit Card		.00
<input checked="" type="checkbox"/>	11/5/2015	Lentgen	Julie	24.57	158 Sleep Bowl Rd		Chandler	AZ	85286	Credit Card		.00

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

After you've placed the tax-deductible column next to the amount column, click the **[Edit]** button so the new column turns **green**. Any cell in **green** in **Trail Blazer** allows you to **edit** it in the grid view, which can save a lot of time instead of going record by record.

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

Search Reset + New [Icons] File Edit Apply to Pledges Contributions

Favorites General Memory/Honor Other Gateway Contact SQL

Payment Methods: Credit Card Thank You Letter: <ignore>
 Use Type: <ignore> Thank You Call: <ignore>
 Memo: Earmarked: <ignore>
 Check Number: In-Kind Type: <ignore>
 Anonymous: <ignore> Bundler: <ignore>

← Edit Sort Format Wrap Export Print Pivot

Contributions [656 records found]

<input checked="" type="checkbox"/>	Date	Last Name	First Name	Amount	Amount/ Tax Deductible	Street	Street 2	City	State	Zip Code	Payment Method	Recurrence Type
<input checked="" type="checkbox"/>	11/23/2015	Daigle	Jazz	175.00	.00	1800 Baptist World Ce...		Nashville	TN	37207	Credit Card	
<input checked="" type="checkbox"/>	11/23/2015	Wagner	Anthony	15.00	.00	10101 Fondren Rd	Suite 222	Houston	TX	77096	Credit Card	
<input checked="" type="checkbox"/>	11/20/2015	Caryl	Alysia	145.00	.00	390 Ashton Ave		San Francisco	CA	94112	Credit Card	
<input checked="" type="checkbox"/>	11/20/2015	Unknown	Abigail	175.43	.00	123 Main St		Eugene	OR	123456	Credit Card	
<input checked="" type="checkbox"/>	11/18/2015	Wheelock	Alex	1,000.00	.00	1705 Highway 59	Suite 11	Mandeville	LA	70448	Credit Card	
<input checked="" type="checkbox"/>	11/12/2015	Ferguson	Ashley	147.55	.00	1701 Shackelford Rd S		Little Rock	AR	72211	Credit Card	
<input checked="" type="checkbox"/>	11/12/2015	Caplan	Neil	145.00	.00	PO Box 843		Glenham	NY	12527	Credit Card	
<input checked="" type="checkbox"/>	11/12/2015	Nelson	Amber	123.56	.00	PO Box 85		Oakley	UT	84055	Credit Card	
<input checked="" type="checkbox"/>	11/11/2015	Crum	Caitlyn	145.00	.00	425 Sugar Maple Ln		Marion	OH	43302	Credit Card	
<input checked="" type="checkbox"/>	11/10/2015	Ozorkiewicz	Melodie	145.00	.00	PO Box 101104		Fort Worth	TX	76185	Credit Card	
<input checked="" type="checkbox"/>	11/9/2015	McMahon	Cory	145.00	.00	2151 59th St		St Louis	MO	63110	Credit Card	
<input checked="" type="checkbox"/>	11/5/2015	Jentgen	Julie	24.57	.00	158 Sleep Bowl Rd		Chandler	AZ	85286	Credit Card	
<input checked="" type="checkbox"/>	656			147,370.27	.00							

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

You can now **double-click** in the green cell and populate the data for the tax-deductible amount. Click **[Save]** in the bottom-right as you go. *My finished example is below.*

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

The screenshot shows the TrailBlazer software interface. At the top, there is a menu bar with options like Search, Reset, New, File, Edit, and Apply to Pledges. Below the menu bar, there are tabs for Favorites, General, Memory/Honor, Other, Gateway, Contact, and SQL. The main area contains a form for entering contribution details, including Payment Methods, Use Type, Memo, Check Number, Anonymous, Thank You Letter, Thank You Call, Earmarked, In-Kind Type, and Bundler. Below the form is a table of contributions with 656 records found. The table has columns for Date, Last Name, First Name, Amount, Amount/ Tax Deductible, Street, Street 2, City, State, Zip Code, Payment Method, and Recurrence Type. The 'Amount/ Tax Deductible' column is highlighted in green, and a red box is drawn around it. A red arrow points to the 'Save' button at the bottom of the window.

	Date	Last Name	First Name	Amount	Amount/ Tax Deductible	Street	Street 2	City	State	Zip Code	Payment Method	Recurrence Type
<input checked="" type="checkbox"/>	11/23/2015	Daique	Jazz	175.00	45.00	800 Baptist World Ce...		Nashville	TN	37207	Credit Card	
<input checked="" type="checkbox"/>	11/23/2015	Wagner	Anthony	15.00	15.00	0101 Fondren Rd	Suite 222	Houston	TX	77096	Credit Card	
<input checked="" type="checkbox"/>	11/20/2015	Caryl	Alysia	145.00	100.00	90 Ashton Ave		San Francisco	CA	94112	Credit Card	
<input checked="" type="checkbox"/>	11/20/2015	Unknown	Abigail	175.43	100.00	23 Main St		Eugene	OR	123456	Credit Card	
<input checked="" type="checkbox"/>	11/18/2015	Wheelock	Alex	1,000.00	.00	705 Highway 59	Suite 11	Mandeville	LA	70448	Credit Card	
<input checked="" type="checkbox"/>	11/12/2015	Ferguson	Ashley	147.55	147.55	701 Shackelford Rd S		Little Rock	AR	72211	Credit Card	
<input checked="" type="checkbox"/>	11/12/2015	Caplan	Neil	145.00	145.00	0 Box 843		Glenham	NY	12527	Credit Card	
<input checked="" type="checkbox"/>	11/12/2015	Nelson	Amber	123.56	123.56	0 Box 85		Oakley	UT	84055	Credit Card	
<input checked="" type="checkbox"/>	11/11/2015	Crum	Caitlyn	145.00	.00	25 Sugar Maple Ln		Marion	OH	43302	Credit Card	
<input checked="" type="checkbox"/>	11/10/2015	Ozorkiewicz	Melodie	145.00	.00	0 Box 101104		Fort Worth	TX	76185	Credit Card	
<input checked="" type="checkbox"/>	11/9/2015	McMahon	Cory	145.00	145.00	151 59th St		St Louis	MO	63110	Credit Card	
<input checked="" type="checkbox"/>	11/5/2015	Jentgen	Julie	24.57	.00	58 Sleep Bowl Rd		Chandler	AZ	85286	Credit Card	
<input checked="" type="checkbox"/>	11/4/2015	Platt	Kevin	1,000.00	1,000.00	256 Landmark Trl S		Hopkins	MN	55343	Credit Card	
<input checked="" type="checkbox"/>	11/4/2015	Gray	Damian	145.00	25.00	330 Technology Ln		Birmingham	AL	35210	Credit Card	
<input checked="" type="checkbox"/>	11/4/2015	Broughton	Catherine	145.00	25.00	510 Mills Branch Dr	Apt 140	Humble	TX	77345	Credit Card	
<input checked="" type="checkbox"/>	11/4/2015	Miller	Derek	145.00	25.00	050 K St NW	Suite 350	Washington	DC	20007	Credit Card	
	656			147,370.27	2,116.11							

1. Double-click in the green cells

The **related resources** below link to a variety of useful article and videos on this topic.



Trail Blazer

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

Related Resources

Article: [Contribution Year-End Report](#)

Article: [Enter Contributions](#)

Article: [How to Change your Current, Previous, and Next Cycle or Fiscal Year, and How to Mass Update Donations to a Specific Cycle or Fiscal Year En Masse – Nonprofit Only](#)

Article: [How to Add and Remove the Allocation Funds to your Online Donation Form, and to the Drop-Down Menus in your Database](#)

Article: [How to Remove an ‘Event’ from the Drop-Down List when Entering Donations](#)

Article: [Contribution Year-End Report](#)

Article: [How to Create a Custom Redirect Thank-You Page for your Donation Form\(s\) that Automatically Populates the Donor’s First Name and the Donation Amount they Gave – Advanced Feature](#)

Article: [Memorial and Honorarium Gifts – Add the Option to your Online Donation Form, and How to Run Searches and Build Reports on these Type of Gifts in the Database](#)

Article: [Custom Donation Amounts for Non-Primary Pages – List of All Configurable Donation Page URL Options](#)

Article: [Recording Non-Monetary \(In-Kind\) Contributions and Creating New Non-Monetary Types](#)

Article: [Delete a Contribution](#)

Article: [How to Enable ACH \(E-Check\) Payments with the Vanco Merchant Gateway on Trail Blazer’s Donation Form](#)

Article: [Modify your Donation Form – Change the Amounts – Add Descriptions – Add & Remove which Amounts Display](#)

Article: [How to Put your Trail Blazer Donation Form on your Facebook Page](#)

Article: [How to Add the Security Disclaimer Section to your Online Donation Form, and How to Style the Text Inside with html & CSS](#)

Article: [How to Create a Custom Thank-You Auto-Responder Email with Merge Fields for your Online Donation Form](#)

Article: [How to Configure Recurring Donation Options for your Trail Blazer Donation Form \(must be using either Vanco Services or Authorize.Net as your Merchant Gateway\)](#)

Video: [Getting Started 106a – Entering Contributions \(NON PROFIT ONLY\)](#)

Video: [Thank you’s using mass email](#)

Video: [Thank A Person Once For Multiple Contributions](#)

Video: [Getting Started 107 – Writing Contribution Thank You Letters](#)

Video: [Year End Tax Letter](#)

Video: [Write Letter – Edit Letter after Mail Merge](#)

Video: [Filtered Contribution Columns in Format](#)

Video: [Donation Auto Responders with Merge Fields](#)

Video: [Attributes – Add To Donation Page](#)

Video: [Iframes](#)

Video: [Contributions Online – Change Default \\$ Donation Amounts](#)

Trail Blazer Live Support

📞 **Phone:** 1-866-909-8700

✉️ **Email:** support@trailblz.com

📘 **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.

Tax-Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage

** 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.*