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Overview

This article will teach you how to enter the **tax-deductible** donation **amount** when <u>recording/updating donations</u>. 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

<u>Outline</u>

#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

KNOWLEDGE BASE www.trailblz.com/kb



#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.





<u>Query</u> 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.*



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

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		Individual	Last Name:	Kristenson	•	o	Title:								
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Ľ		LZ796 Senor	Kristenson Je		Anders	9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427	(843) 442-1919	(866) 909-8700	(654) 897-9875	Jkristenson@trailblz.com	Irail Blazer
	1														

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.*



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	Open	5/8/2014	160.00	Calendar Year 2014		Credit Card		.00	.00	.00		
	Open	5/1/2014	1,000.00	Calendar Year 2014		Check		.00	.00	1,000.00		
	Open	9/27/2013	20.00	Calendar Year 2013		Cash		.00	.00	.00		
	Open	9/23/2013	250.50	Calendar Year 2013		Credit Card		.00	.00	.00		
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	Open	8/23/2013	250.50	Calendar Year 2013		Credit Card		.00	.00	.00		
	Open	8/2/2013	250.50	Calendar Year 2013		Credit Card		.00	.00	.00		
	Open	7/22/2013	250.50	Calendar Year 2013		Credit Card		.00	.00	.00		
	Open	7/17/2013	50.00	Calendar Year 2013		Credit Card		.00	.00	.00		
	Open	7/15/2013	250.50	Calendar Year 2013		Credit Card		.00	.00	.00		
	Open	7/15/2013	100.00	Calendar Year 2013		Check		.00	.00	.00		
	Open	7/9/2013	250.50	Calendar Year 2013		Credit Card		.00	.00	.00		
	Open	7/2/2013	250.50	Calendar Year 2013		Credit Card		.00	.00	.00		
	Open	5/6/2013	100.00	Calendar Year 2013		Credit Card		.00	.00	.00		
	Open	1/17/2013	5,000.00	Calendar Year 2013		Check		.00	.00	.00		
	Open	4/6/2012	1,500.00	Calendar Year 2012		Check		.00	.00	.00		



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.*



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Apt 10 Beware of cats Golden Valley,	(street 3 merge field) MN, 55427	Less Refunds: Net Amount:	.00 1,500.00	
General Refund	Allocate Match Memor	y/Honor Notify Oth	ner Gateway	
Event:	5 K Aruna Run - Portlar	nd	•	
Cycle:	Calendar Year 2012		•	
Type: Recurrence: Check Number Amount: Memo:	A/ 6/2012	duct Amt: 1,500.00		
	1. Ent	er the tax	\ k-deduc	tible amou



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.







Build and run your <u>search query</u> 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).*



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.

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Click File > Set Tax Deductible Amount.



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	V	<u>46901</u>	4/1/2016	Amundson	Eugene		99.00	99.00	Credit Card	7218 Robinwood Draw	Woodbury	MN	
	V	<u>46900</u>	10/10/2016	Wynn	<u>Collette</u>		65.00	65.00	Credit Card	17453 Glacier Way	Lakeville	ст	
		<u>46899</u>	11/14/2016	Adelman	Edward		989.00	989.00	Credit Card	641 6th St	Albany	MN	
		<u>46898</u>	4/6/2016	Walton	Melody		99.00	99.00	Credit Card	22146 Firelight Dr	Park Rapids	ст	
		<u>46897</u>	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	-
		40894	2/4/2016	Horton	<u>Tanya</u> Rilly Rob		500.00	800.00	Credit Card	1212 9th St S	Minneapolis	MN	-
		46593	11/10/2016	Kristenson			45.00	.00	Credit Card	0110 Colden Valley Rd	Colden 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.



	Set Tax Deductible Amount
1. Select your	 Full - Set Tax Deductible Amount = Amount Non - Set Tax Deductible Amount = 0 Partial - Set Tax Deductible Amount = % of Amount Set Percent:
	OK OCancel

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.

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	Setting of the tax deductible amount is complete, 76 records updated.
-	ОК

If you format in the Amount Tax/Deductible column into the grid you can verify the results. My finished example is below. KNOWLEDGE BASE www.trailblz.com/kb





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	V	<u>46901</u>	4/1/2016	Amundson	Eugene	99.00	99.00	iredit Card	7218 Robinwood Draw	Woodbury	MN	
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	V	<u>46899</u>	11/14/2016	Adelman	Edward	989.00	989.00	redit Card	641 6th St	Albany	MN	
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	V	<u>46896</u>	8/16/2016	Labree	John	45.00	45.00	redit Card	5501 Village Dr	Edina	MN	
	V	<u>46895</u>	9/18/2016	<u>Akemann</u>	James	80.00	80.00	redit Card	1021 Westwood Dr	Faribault	MN	
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		46893	11/18/2016	Horton	Billy Bob	500.00	500.00	redit Card	546 Lake St E	Minneapolis	MN	
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		46583	11/2/2016	Kristenson	loel	45.00	45.00	redit Card	9110 Golden Valley Rd	Golden Valley	MN	-



If a mistake was made you can usually <u>roll-it-back</u> 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**.







Build and run your <u>search query</u>. In this example I populated all credit card contribution records for 2015 which produced 656 donation records.



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KNOWLEDGE BASE <u>www.trailblz.com/kb</u>



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



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



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2. Scroll to the bottom of this list so that the 'Amount/TaxDeductible' option is displayed.



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



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



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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* <u>formatting</u>.



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	11/23/2015	Wagner	Anthony	15.00	10101 Fondren Rd	Suite 222	Houston	TX	77096	Credit Card		.00	
	11/20/2015	<u>Caryl</u>	<u>Alysia</u>	145.00	390 Ashton Ave		San Francisco	CA	94112	Credit Card		.00	
	11/20/2015	<u>Unknown</u>	Abigail	175.43	123 Main St		Eugene	OR	123456	Credit Card		.00	
	11/18/2015	Wheelock	Alex	1,000.00	1705 Highway 59	Suite 11	Mandeville	LA	70448	Credit Card		.00	
	11/12/2015	Ferguson	Ashley	147.55	1701 Shackleford Rd S		Little Rock	AR	72211	Credit Card		.00	
	11/12/2015	<u>Caplan</u>	Neil	145.00	PO Box 843		Glenham	NY	12527	Credit Card		.00	
	11/12/2015	Nelson	Amber	123.56	PO Box 85		Oakley	UT	84055	Credit Card		.00	
	11/11/2015	Crum	<u>Caitlyn</u>	145.00	425 Sugar Maple Ln		Marion	ОН	43302	Credit Card		.00	
	11/10/2015	<u>Ozorkiewicz</u>	Melodie	145.00	PO Box 101104		Fort Worth	TX	76185	Credit Card		.00	
	11/9/2015	<u>McMahon</u>	Cory	145.00	2151 59th St		St Louis	MO	63110	Credit Card		.00	
	11/5/2015	lentgen	Iulia	24.57	158 Sleep Bowl Rd		Chandler	Δ7	85286	Credit Card		00	



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.



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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.*



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	V	11/20/2015	<u>Caryl</u>	<u>Alysia</u>	145.00	100.00	90 Ashton Ave		San Francisco	CA	94112	Credit Card		
		11/20/2015	<u>Unknown</u>	Abigail	175.43	100.00	23 Main St		Eugene	OR	123456	Credit Card		
	V	11/18/2015	Wheelock	Alex	1,000.00	.00	705 Highway 59	Suite 11	Mandeville	LA	70448	Credit Card		
		11/12/2015	Ferguson	Ashley	147.55	147.55	701 Shackleford Rd S		Little Rock	AR	72211	Credit Card		
	V	11/12/2015	<u>Caplan</u>	Neil	145.00	145.00	O Box 843		Glenham	NY	12527	Credit Card		
		11/12/2015	Nelson	Amber	123.56	123.56	O Box 85		Oakley	UT	84055	Credit Card		
	V	11/11/2015	Crum	<u>Caitlyn</u>	145.00	.00	25 Sugar Maple Ln		Marion	он	43302	Credit Card		
		11/10/2015	<u>Ozorkiewicz</u>	Melodie	145.00	.00	O Box 101104		Fort Worth	ТΧ	76185	Credit Card		
	V	11/9/2015	<u>McMahon</u>	Cory	145.00	145.00	151 59th St		St Louis	MO	63110	Credit Card		
		11/5/2015	<u>Jentgen</u>	Julie	24.57	.00	58 Sleep Bowl Rd		Chandler	AZ	85286	Credit Card		
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1. Double-click in the green cells



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



- 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: <u>Attributes Add To Donation Page</u>
- Video: Iframes
- Video: Contributions Online Change Default \$ Donation Amounts

Trail Blazer Live Support

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- Email: support@trailblz.com
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