

How to Create a Donor LYBUNT Search Query (Donors who Gave Last Year BUT Unfortunately NOT This Year) and How to Save and Load it as a Search Favorite


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Overview

This article will teach you how to **save** an *advanced search query* as a **favorite** and **re-load** it again. *It's useful to store queries you run often to save time, and improve consistency in the future. Saved queries are **dynamic** so as soon as the data changes, the search results will change accordingly. Saved queries are stored in the "Cloud", accessible by any of the database users.*


IMPORTANT: *Saved queries only reside within the **search window** you build them in (ex: if you save a search in the 'Contacts/Voters/Donors' list it will only be available in that list vs other lists such as Households/Contributions/Etc.)*

 **Tip:** Use the **Ctrl+F** hot key to jump to different sections of this article (example: "**#1**", "**#2**" or "**Related Resources**").

Outline

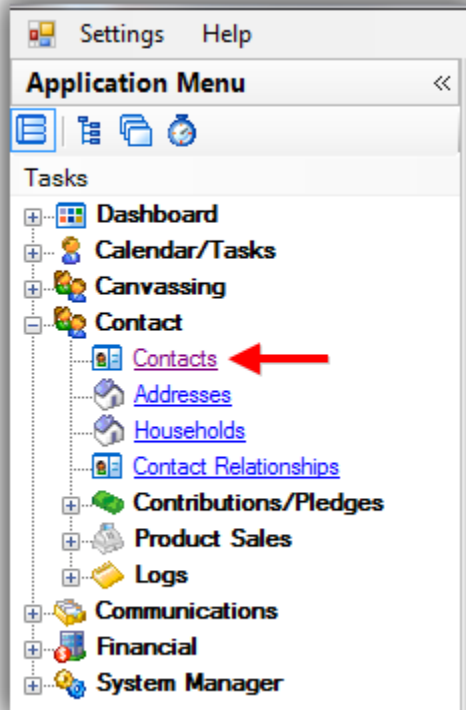
- #1 – Steps to Create an Advanced “LYBUNT” Donor Query
- #2 – Save and Load your Search Query as a ‘Favorite’
- #3 – Related Resources

#1 – Steps to Create an Advanced “LYBUNT” Donor Query

 **Tip:** *LYBUNT and SYBUNT queries are extremely useful to solicit lapsed donors.*

First, navigate to the **Contacts** (*Donors/Voters*) list under the **Application Menu**.

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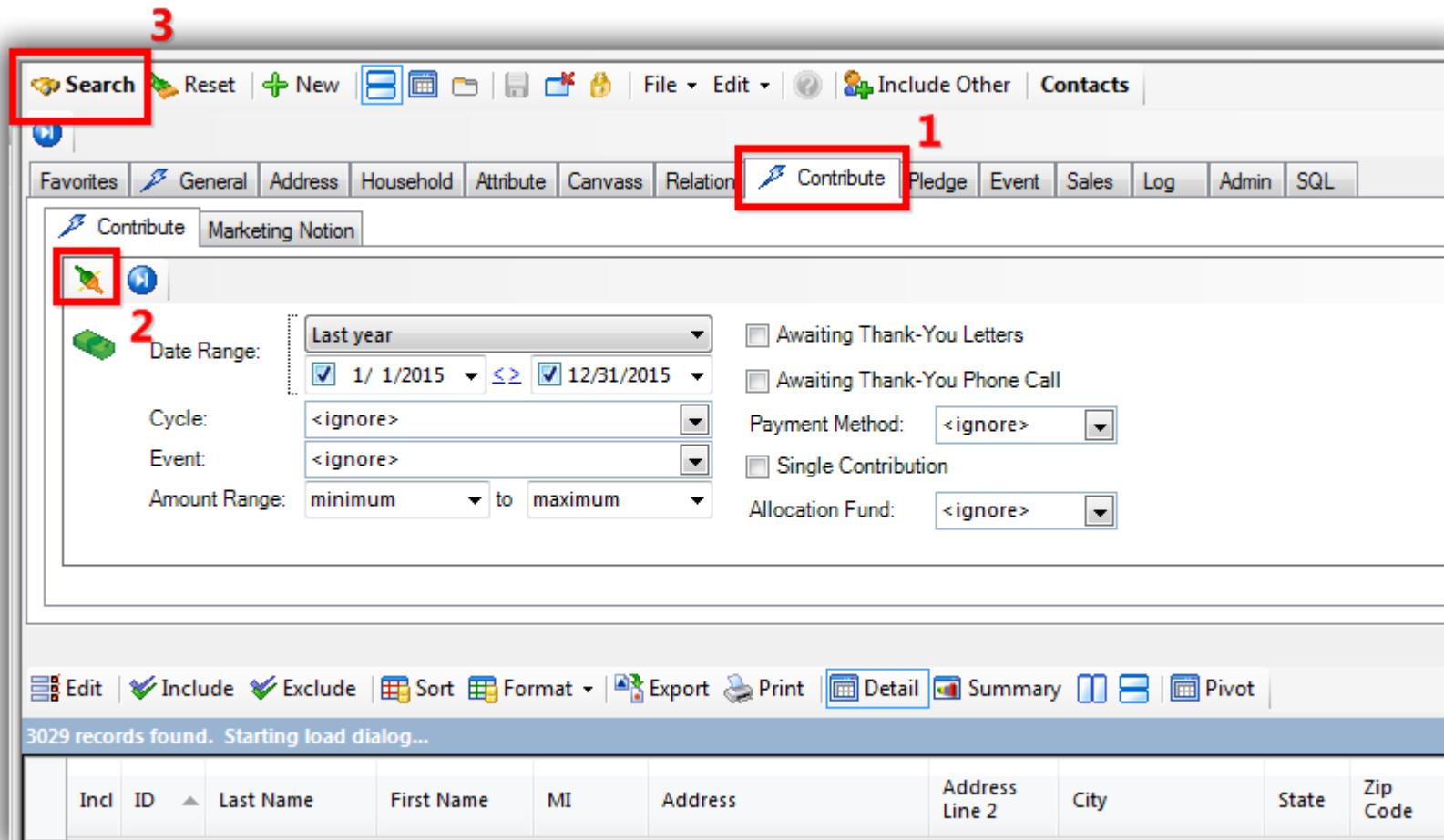


Navigate to the **Contribute** tab, **[Plug]** it in the tab to activate it, select **Last Year** from the date range drop-down, and then click **[Search]** to execute the query.

IMPORTANT: If you're running on a cycle that's different than a calendar year you'll need to enter those date ranges vs selecting them from the date range drop-down.

In my example I also select 'just individuals' from the General tab, if you don't want to do that it will include both individuals as well as companies.

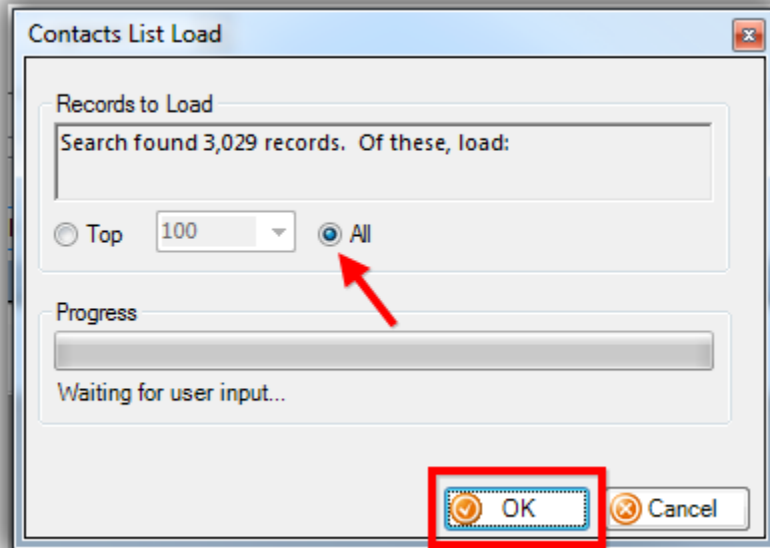
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The screenshot shows the TrailBlazer search interface. At the top, the 'Search' button is highlighted with a red box and the number '3'. Below it, the 'Contribute' tab is highlighted with a red box and the number '1'. In the search filter section, the search filter icon is highlighted with a red box and the number '2'. The search criteria are set to 'Date Range: Last year' with a date range of '1/1/2015' to '12/31/2015'. The status bar at the bottom indicates '3029 records found. Starting load dialog...'. Below the status bar is a table with columns: Incl, ID, Last Name, First Name, MI, Address, Address Line 2, City, State, and Zip Code.

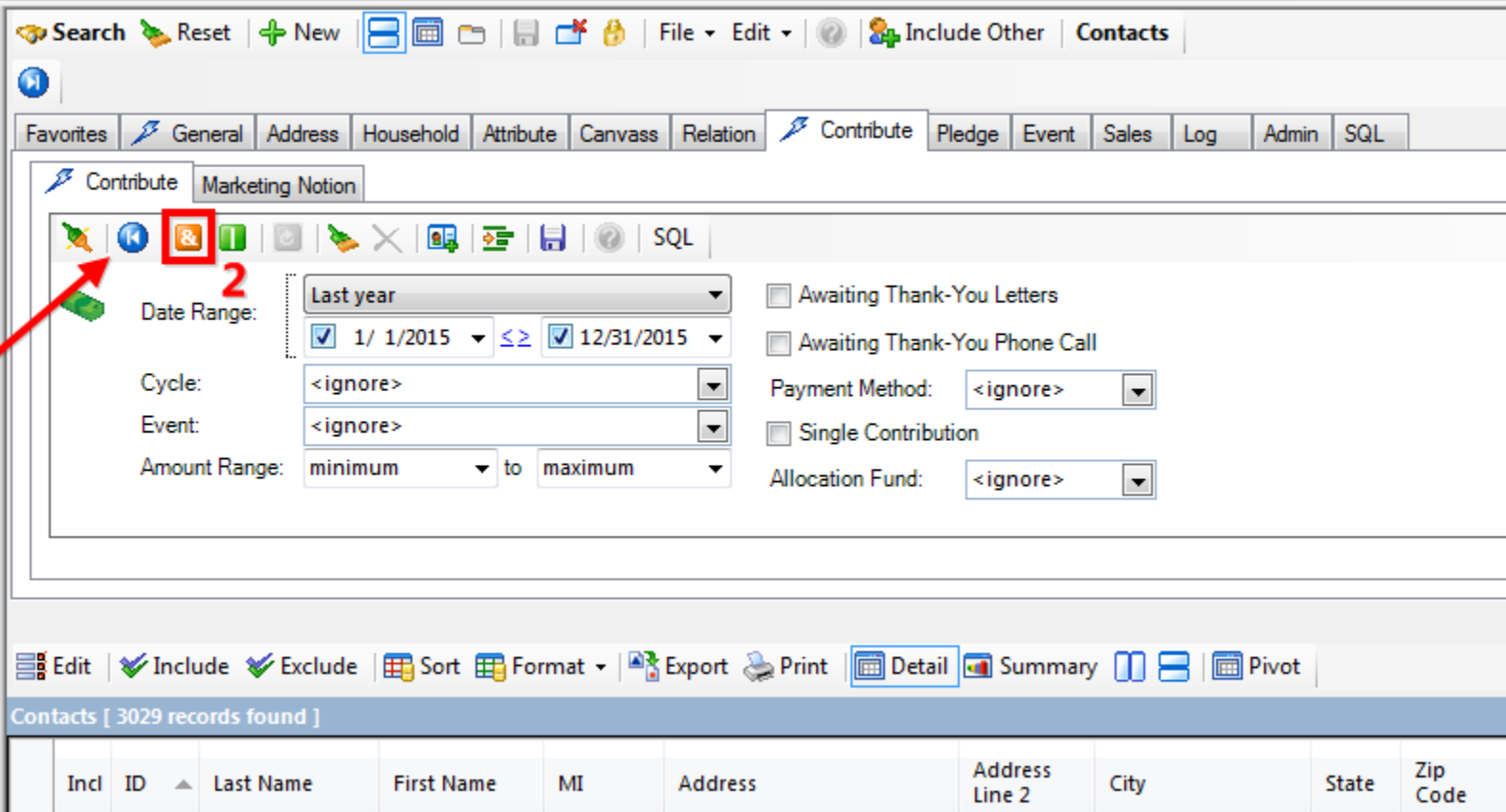
If your record count is over 1k, select the 'all' radio button, and click [OK]. In my example the query produced **3,029** donors who gave **last year**. If the record count is under 1k it will auto-populate.

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Expand the **Advanced Functions** tool strip by clicking the circular **blue** button, and then click the **orange [&]** button to add an SQL '**AND**' statement. *This will add a new search sub-tab also called 'Contribute'.*

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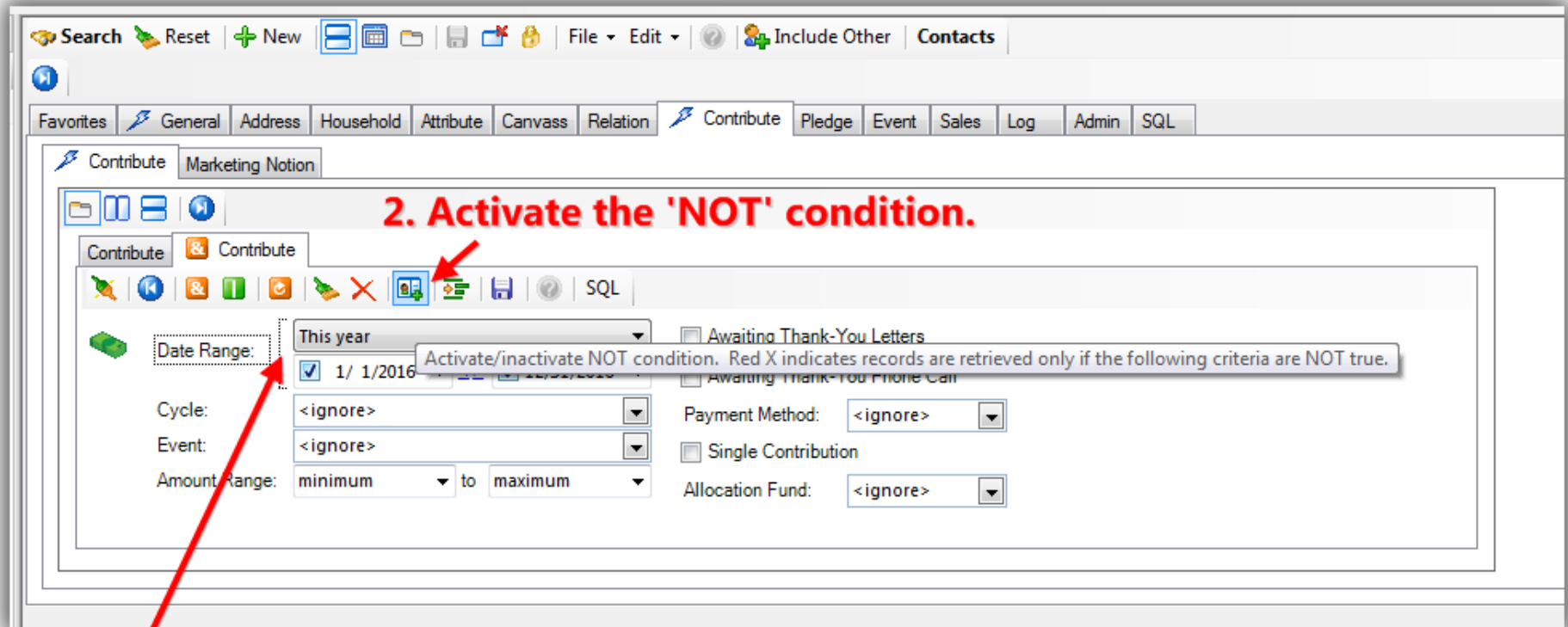
The screenshot displays the TrailBlazer search interface. At the top, there are navigation buttons like 'Search', 'Reset', 'New', and 'Include Other'. Below that is a menu bar with options like 'General', 'Address', 'Household', 'Attribute', 'Canvass', 'Relation', 'Contribute', 'Pledge', 'Event', 'Sales', 'Log', 'Admin', and 'SQL'. The 'Contribute' sub-tab is active, showing a 'Marketing Notion' section. In this section, a toolbar contains several icons, including a green plus sign (labeled '1') and a red 'X' over a green plus sign (labeled '2'). The search criteria are as follows:

- Date Range:** Last year (dropdown), 1/ 1/2015 (checkbox and dropdown), <= (checkbox), 12/31/2015 (checkbox and dropdown)
- Cycle:** <ignore> (dropdown)
- Event:** <ignore> (dropdown)
- Amount Range:** minimum (dropdown) to maximum (dropdown)
- Awaiting Thank-You Letters
- Awaiting Thank-You Phone Call
- Payment Method:** <ignore> (dropdown)
- Single Contribution
- Allocation Fund:** <ignore> (dropdown)

At the bottom, there is a toolbar with 'Edit', 'Include', 'Exclude', 'Sort', 'Format', 'Export', 'Print', 'Detail', 'Summary', and 'Pivot'. Below this is a status bar showing 'Contacts [3029 records found]' and a table header with columns: Incl, ID, Last Name, First Name, MI, Address, Address Line 2, City, State, Zip Code.

In the new sub-tab that opens select '**This Year**' from the date range drop-down, and then click on the '**NOT**' condition to activate it. *Once the 'NOT' button is clicked it will turn from a little green + into a red x.*

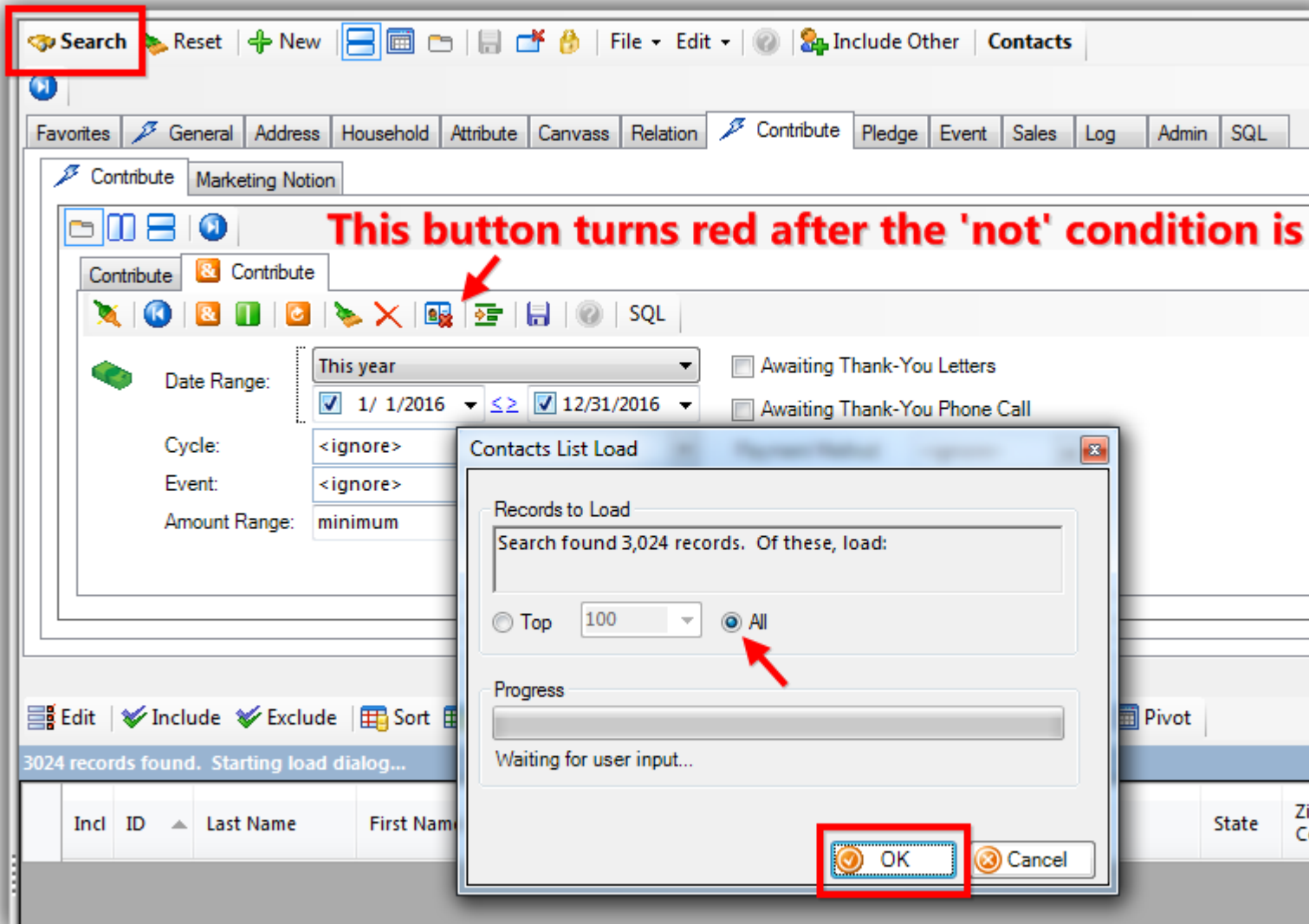
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1. Select 'this year' from the drop-down.

Click **[Search]** to refresh your query results and load 'all' if the list is over 1k. *You could build the entire query without ever clicking [Search] in-between but it's usually beneficial to see the record counts change as new search criteria is added.*

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The screenshot shows the TrailBlazer interface with a search query configured. The 'Search' button in the top toolbar is highlighted with a red box. A red arrow points to a button in the 'Contribute' toolbar, with the text: **This button turns red after the 'not' condition is active.**

The search criteria are set to 'Date Range: This year' with a date range from '1/ 1/2016' to '12/31/2016'. The 'Cycle' is set to '<ignore>' and the 'Amount Range' is 'minimum'. A status bar at the bottom indicates '3024 records found. Starting load dialog...'. A 'Contacts List Load' dialog box is open, showing 'Search found 3,024 records. Of these, load:'. The 'All' radio button is selected, and the 'OK' button is highlighted with a red box.

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Once the records are populated you may want to verify the query results by building a [filtered contribution \(giving history\) format](#) to display how much your donors have given year-by-year.

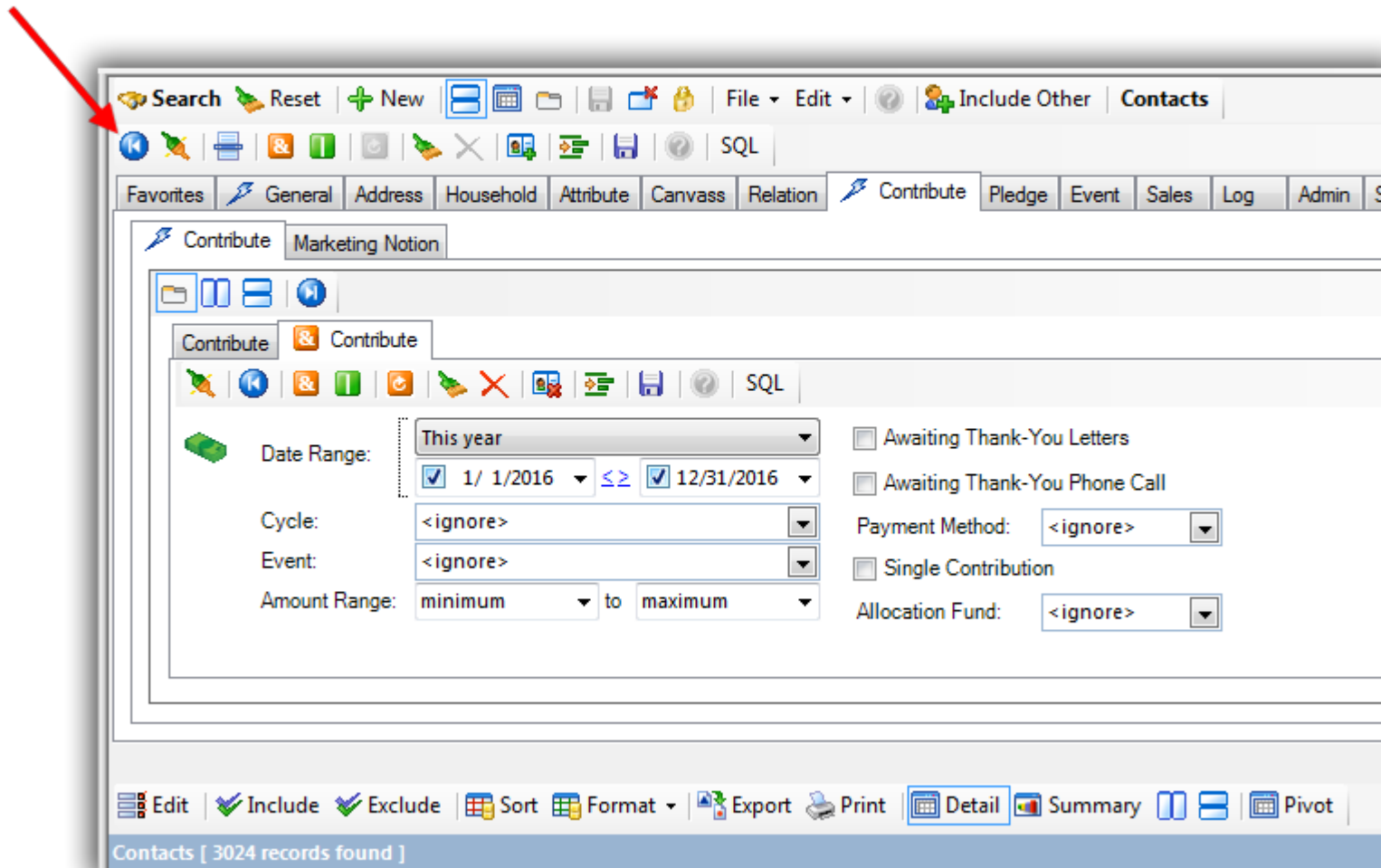
#2 – Save and Load your Search Query as a ‘Search Favorite’

Now that the advanced query has been created you may want to save it so that it can be reused in the future.

First, click on the **topmost [Advanced Function]** to expand the **Advanced Function** tool strip. *This is always located directly below the [Search] button as shown in the image below.*

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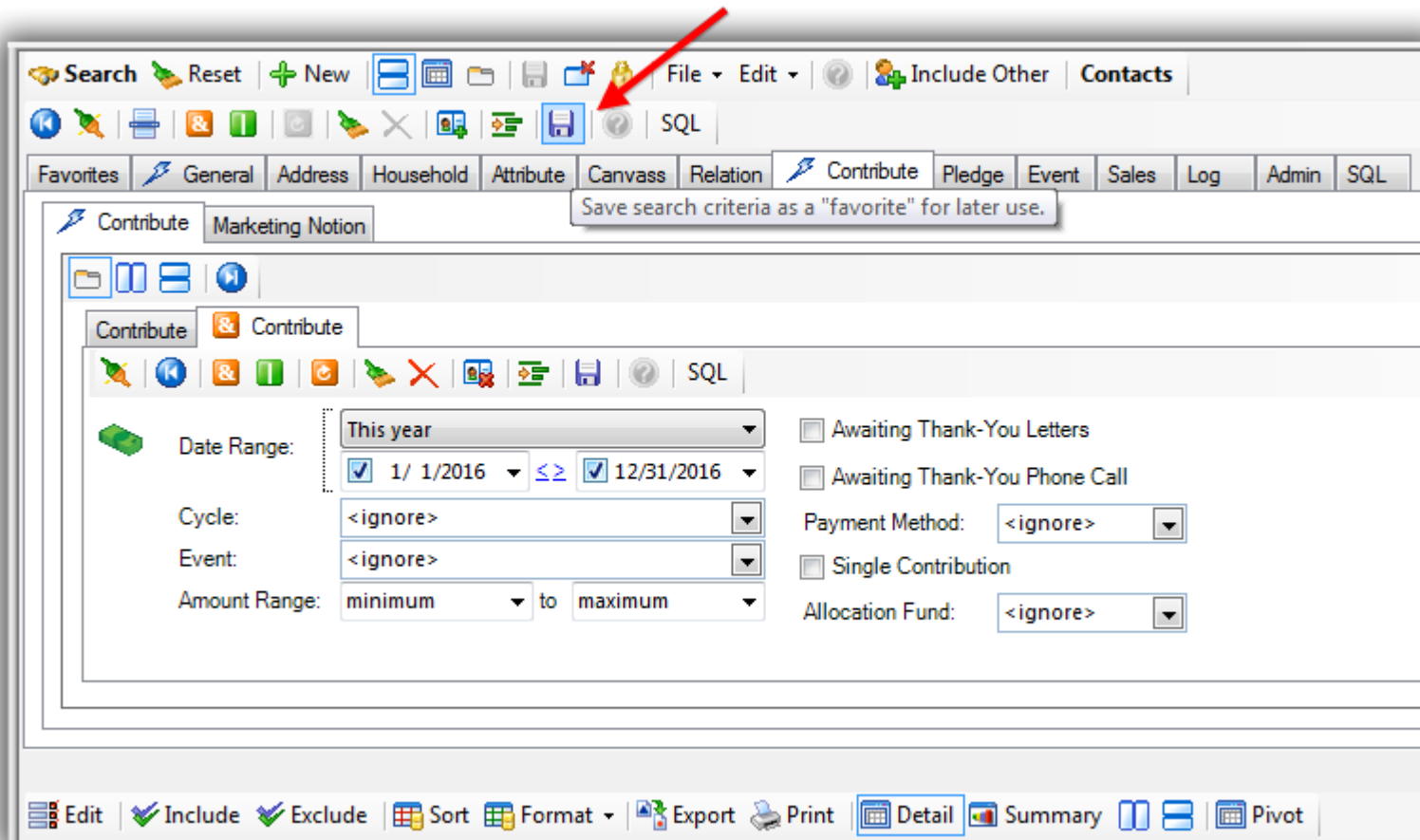
Click this button to expand the Advanced Functions tool strip directly below the [Search] button.



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Click the [Save] button which looks like a **blue** floppy disc. This will allow you to save the query as a **search favorite**.

Click the blue 'floppy disc' icon to save your query as a Favorite.



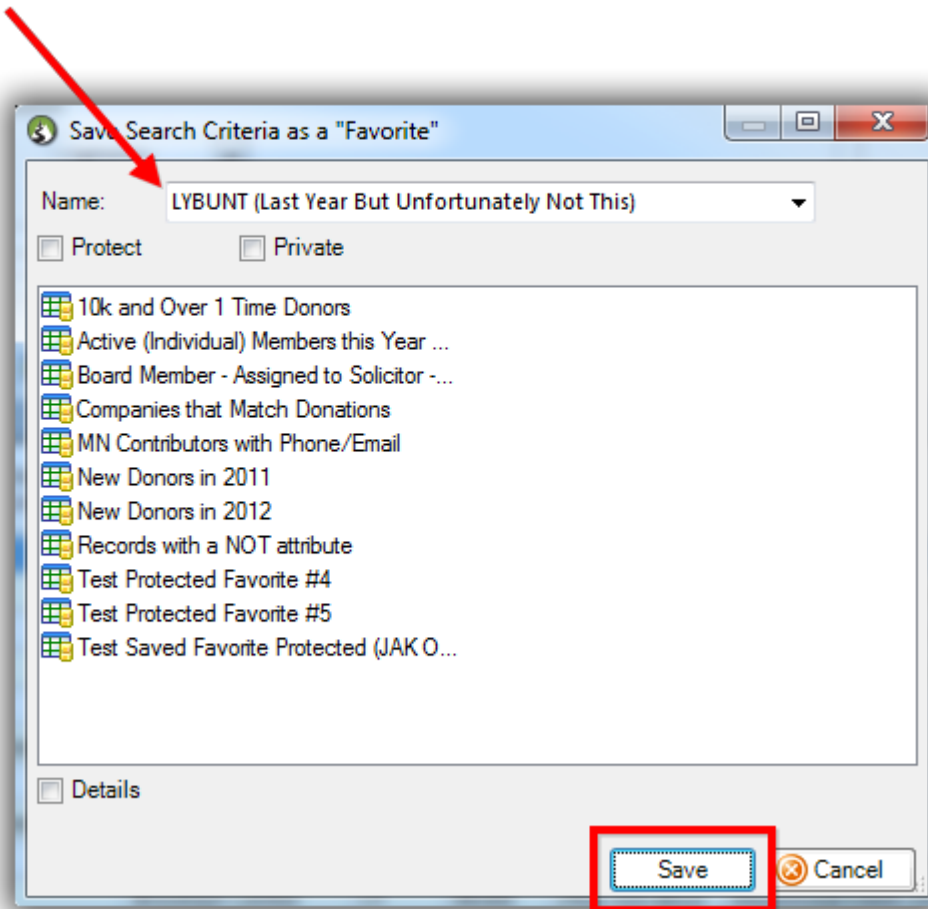
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Give the saved search a **descriptive name** that any other user could easily distinguish. *When you or another user loads the query again it won't show you what search criteria is included (unless you are fluent at [reading SQL](#)) so it's important to be as descriptive as possible.*

Click **[Save]** to complete the process. *In this example I called my saved favorite "LYBUNT (Last Year But Unfortunately Not This)".*

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Give the query a descriptive name.



That completes the steps to **save** your search.

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To **load** the saved favorite navigate to the **Contacts** (*Donors/Voters*) list, click on the '**Favorites**' tab, **check the box** next to the query you saved, and click **[Search]**.

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The screenshot shows the TrailBlazer application interface. On the left is the 'Application Menu' with a 'Tasks' section containing 'Contacts' (highlighted with a red arrow labeled '1'). The main window has a toolbar with a 'Favorites' button (highlighted with a red arrow labeled '3'). Below the toolbar is a 'Favorite Searches' panel (highlighted with a red arrow labeled '2') containing a list of search queries, with 'LYBUNT (Last Year But Unfortunately Not This)' selected. At the bottom, a table displays search results for 'Contacts [3024 records found]'.

Incl	ID	Last Name	First Name	MI	Address	Address Line 2	City	State	Zip Code
<input checked="" type="checkbox"/>	2	Aagard	Martha	R	4629 York Ave S		Minneapolis	MN	55410
<input checked="" type="checkbox"/>	5	Aakhus	Steven	Eric	19981 See Gull Rd		Brainerd	MN	56401

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 **Tip:** You have the ability to **rename** and **delete saved queries**, for more information checkout the **related resources** below.



Trail Blazer™

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

#3 – Related Resources

Article: [Creating Formats for Custom Views and Editing of Your Data](#)

Article: [How to Create a Year-by-Year Giving History Report Using Filtered Contribution Columns in the Grid – Primarily for Nonprofits](#)

Article: [Creating Formats](#)

Article: [Delete Saved Search Queries](#)

Article: [Advanced Queries – the SQL Tab](#)

Article: [How to Mass Update a List of Contacts with an Attribute Item](#)

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

Video: [Reporting 104 – Joined tables](#)

Video: [Formatting the Grid](#)

Video: [Reporting 102 – Quick Reports and Export](#)

Video: [Attributes – Add attribute dates and notes to your lists](#)

Video: [Filter Using New Date Controls](#)

Video: [Search – Contribution AndOr \(donated in 1 time period but not another\)](#)

Trail Blazer Live Support

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f **Facebook:** <https://www.facebook.com/pages/Trail-Blazer-Software/64872951180>

t **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.*