


Author: Joel Kristenson

Last Updated: 2016-07-20

Overview

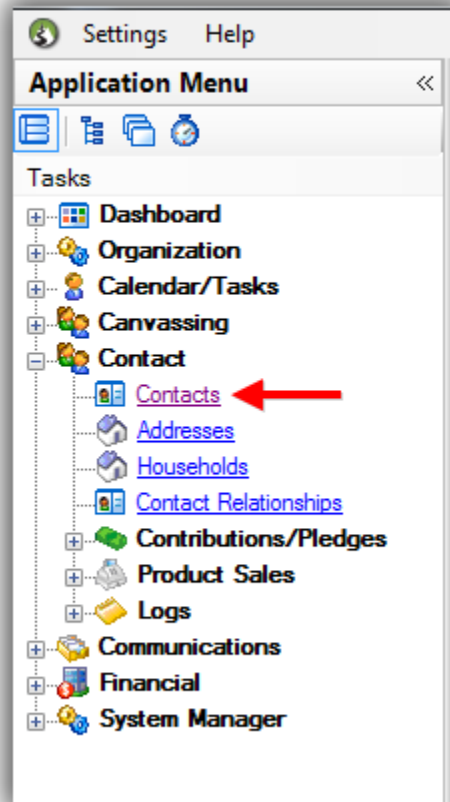
This article walks through the steps to save a [search query](#) as a favorite for future use. The query will be dynamic in nature, so if the data changes in your database, the record counts for the query will change respectively (ex: if you save a [LYBUNT](#) the count will drop as people who gave last year, give again this year).

 **Tip:** It's very useful to save queries as favorites, especially if the query is complex, or if it's a query you run often. This will save time and help with operator error mistakes when rebuilding a search. In most cases you can also add this favorite to your [Dashboard](#) to quickly view the report without needing to reload it.

Steps

Create and run your query from whatever list you need to run it from i.e. Contacts (Voters/Donors), Contributions, Households, etc. *In my example I used the Contacts (Voters/Donors list).*

Navigate to the list where you need to run your search query.



You can see which tabs are active in the search because they will display a **blue** lightning bolt. *In my example I ran my search for all donors who gave both last year and this year which produced **8** results.*

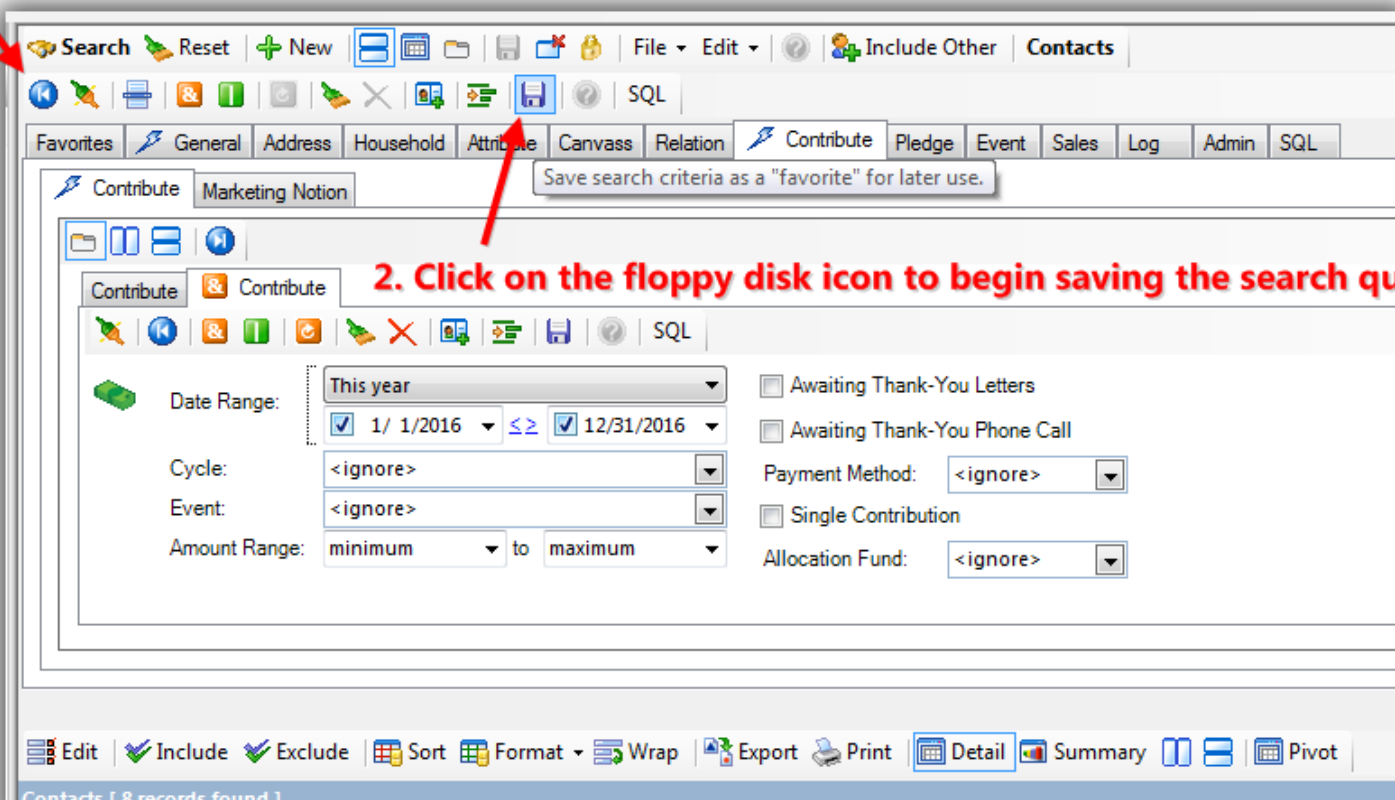
The little blue lightning bolts will distinguish which tabs are active in the search query.

The screenshot shows the TrailBlazer search interface. At the top, there are tabs for 'General', 'Address', 'Household', 'Attribute', 'Cavass', 'Relation', 'Contribute', 'Pledge', 'Event', 'Sales', 'Log', 'Admin', and 'SQL'. The 'Contribute' tab is active, indicated by a blue lightning bolt icon. Below the tabs, there are search criteria fields: 'Date Range' (This year), 'Cycle' (<ignore>), 'Event' (<ignore>), 'Amount Range' (minimum to maximum), 'Awaiting Thank-You Letters', 'Awaiting Thank-You Phone Call', 'Payment Method' (<ignore>), 'Single Contribution', and 'Allocation Fund' (<ignore>). A red box highlights the search criteria with the text: 'Build and run your search query (in this example it's everyone who gave both last year, and this year)'. Below the search criteria, there are buttons for 'Edit', 'Include', 'Exclude', 'Sort', 'Format', 'Wrap', 'Export', 'Print', 'Detail', 'Summary', and 'Pivot'. A red arrow points to the 'Results' section, which shows a table with 8 records found. The table has columns for 'Incl', 'Last Name', 'First Name', 'Street', 'Street 2', 'City', 'State', 'Zip Code', 'Home Phone', 'Email', 'Contribution Total Last Year', and 'Contribution Total This Year'. The data rows are as follows:

Incl	Last Name	First Name	Street	Street 2	City	State	Zip Code	Home Phone	Email	Contribution Total Last Year	Contribution Total This Year
<input checked="" type="checkbox"/>	Aakhus	Ariel	1709 8th St S	Cpo 3010	Moorhead	MN	56560	(218) 825-9215	Ariel@Aakhusxxx.com	620.00	500.00
<input checked="" type="checkbox"/>	Aakhus	Steven	19981 See Gull Rd		Brainerd	MN	56401	(218) 828-9215	Steven@Aakhus.com	1,050.00	50.00
<input checked="" type="checkbox"/>	Anderson	Gloria	9045 Larkspur Ln		Eden Prairie	MN	55347	(952) 944-7034		200.00	45.00
<input checked="" type="checkbox"/>	Galentine	Tom	2956 County 120 Rd NE	Apt 68	Stewartville	CT	06500	(507) 533-8426	Tom@Galentine.com	190.00	.00
<input checked="" type="checkbox"/>	Kristenson	Joel	9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427	(218) 442-1919	jkristenson@trailblz.com	33,658.00	77,761.15
<input checked="" type="checkbox"/>	Silvers	Denise	620 Mendelsoohn Ave N	Suite 186	Golden Valley	MN	55427-4350		denise.and.john@email.com	100.00	500.00
<input checked="" type="checkbox"/>	Uecker	Lynn	1340 Evergreen Pl		Mayer	MN	55360	(952) 237-8029		70.00	.00
<input checked="" type="checkbox"/>	Zwack	James	5419 50th Ave N		Crystal	CT	06500	(763) 536-8626	James@Zwack.com	1,015.00	500.00
8										36,903.00	79,356.15

Expand the top-most **Advanced Functions** tool strip (directly below the **[Search]** button), and then click on the **blue** floppy disk button to begin saving the search as a favorite.

1. Expand the top-most Advanced Functions tool bar (located directly below the [Search] button).



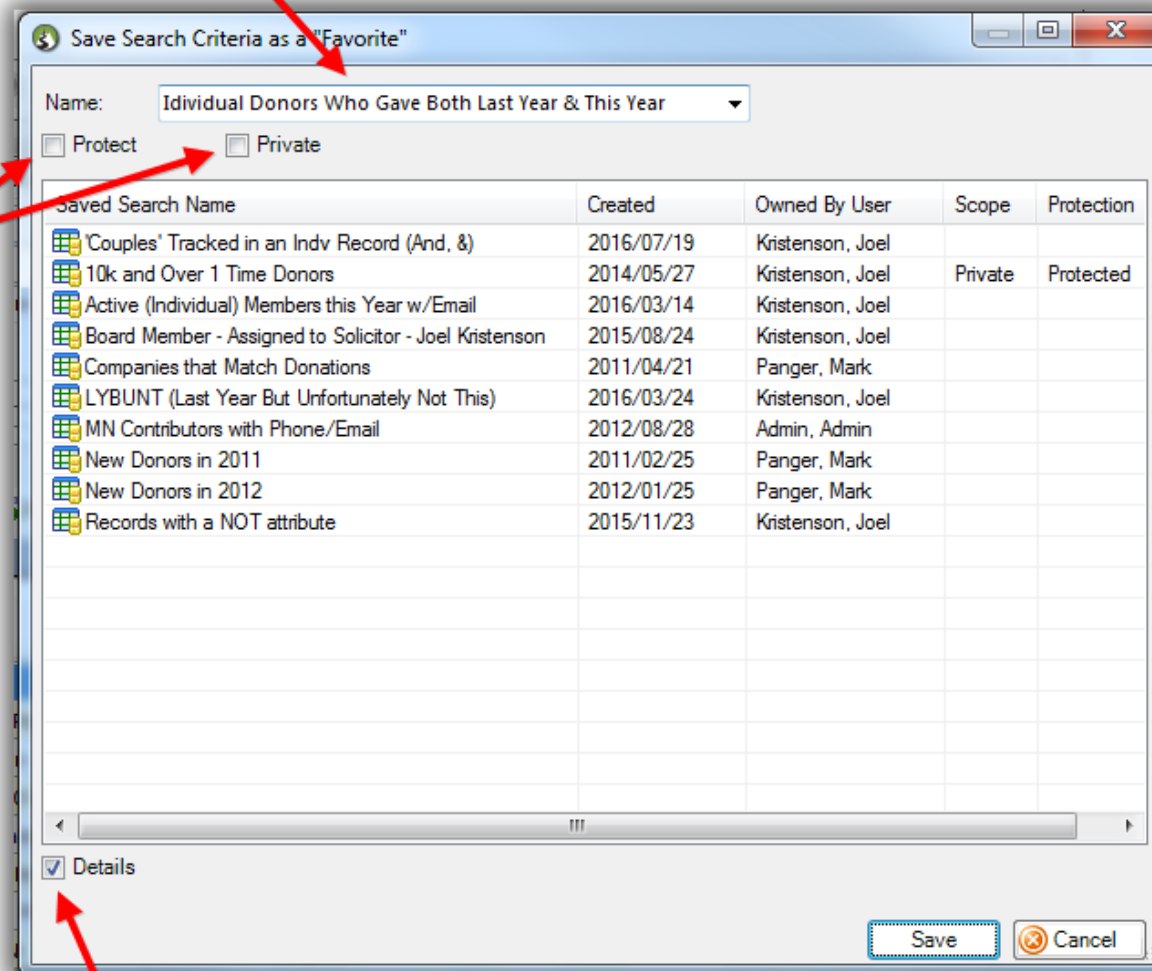
The screenshot shows the TrailBlazer software interface. At the top, there is a menu bar with options like Search, Reset, New, File, Edit, and Include Other. Below the menu bar is a toolbar with various icons, including a blue floppy disk icon. A red arrow points to this floppy disk icon. Below the toolbar is a search criteria form with fields for Date Range, Cycle, Event, Amount Range, and several checkboxes. A tooltip above the floppy disk icon reads "Save search criteria as a 'favorite' for later use." A second red arrow points to the floppy disk icon. At the bottom of the interface, there is a status bar showing "Contacts [8 records found]".

2. Click on the floppy disk icon to begin saving the search query as a favorite.

Give the query a very descriptive name, and click **[Save]**. *You can also make the query **private** and/or **protected** if need be, as well as view further details on the saved queries i.e. create date, and who created it. My example is below for the favorite I created showing indiv donors who gave both last year and this year.*

1. Enter a very *descriptive* name for the search favorite that will be easy to recognize.

***If you want to hide the query from other users, and/or make it 'protected' from further edits you can control that here.**



Save Search Criteria as a "Favorite"

Name: Individual Donors Who Gave Both Last Year & This Year

Protect Private

Saved Search Name	Created	Owned By User	Scope	Protection
Couples' Tracked in an Indv Record (And, &)	2016/07/19	Kristenson, Joel		
10k and Over 1 Time Donors	2014/05/27	Kristenson, Joel	Private	Protected
Active (Individual) Members this Year w/Email	2016/03/14	Kristenson, Joel		
Board Member - Assigned to Solicitor - Joel Kristenson	2015/08/24	Kristenson, Joel		
Companies that Match Donations	2011/04/21	Panger, Mark		
LYBUNT (Last Year But Unfortunately Not This)	2016/03/24	Kristenson, Joel		
MN Contributors with Phone/Email	2012/08/28	Admin, Admin		
New Donors in 2011	2011/02/25	Panger, Mark		
New Donors in 2012	2012/01/25	Panger, Mark		
Records with a NOT attribute	2015/11/23	Kristenson, Joel		

Details

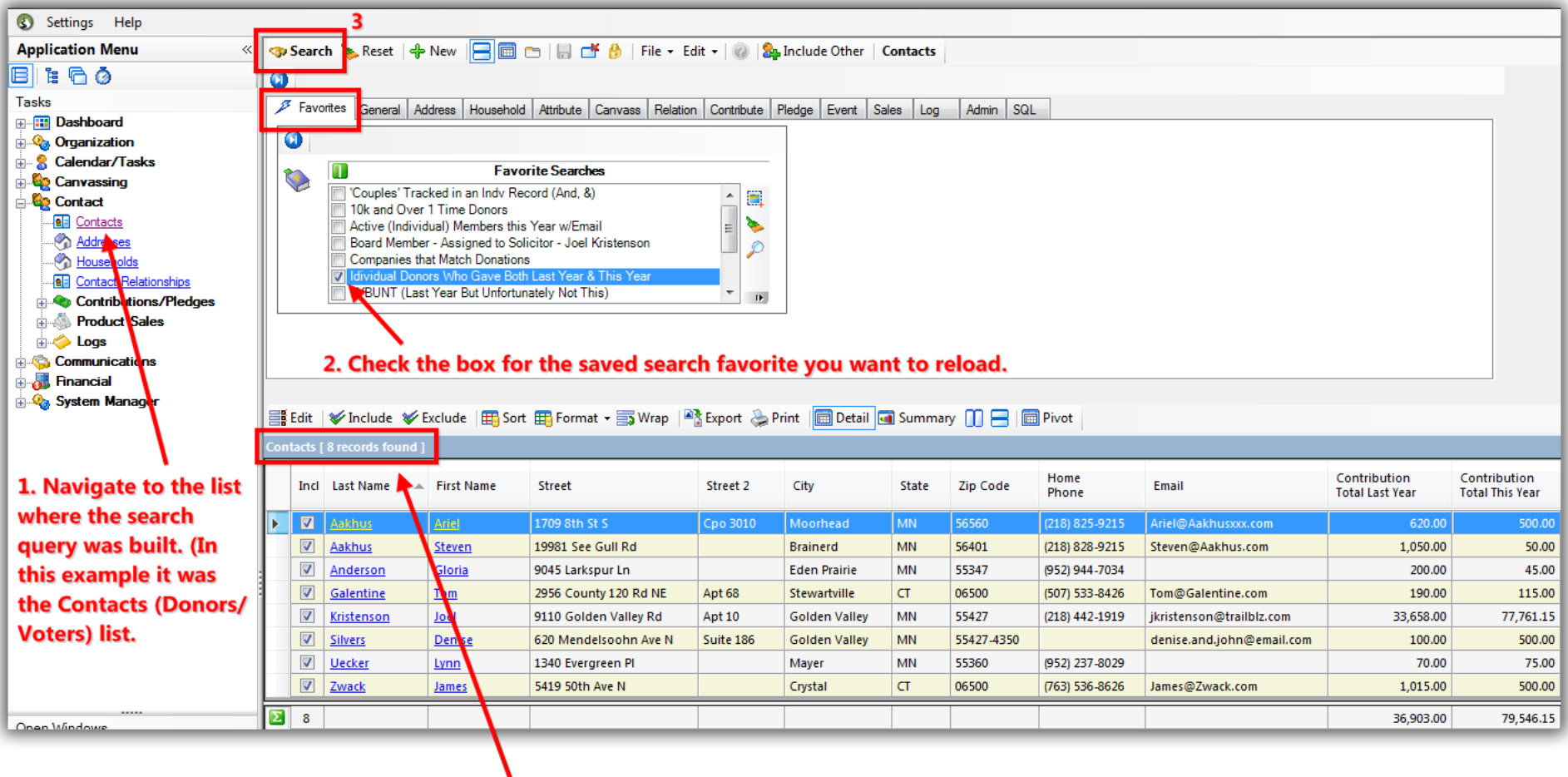
Save Cancel

***If you want to view details about the saved favorites, check this box.**

2. After the name and other settings for the favorite are entered, click

That completes the steps to save a search favorite. *Queries will *only* be stored in the list they were created in.*

To load a search favorite you'll need to return the list where the search was built (*in this case it was the contacts 'donors/voters' list*), navigate to the **Favorites** tab, check the box next to the saved favorite you need to load, and click **[Search]**.



1. Navigate to the list where the search query was built. (In this example it was the Contacts (Donors/ Voters) list.)

2. Check the box for the saved search favorite you want to reload.

3

Favorite Searches

- 'Couples' Tracked in an Indv Record (And. &)
- 10k and Over 1 Time Donors
- Active (Individual) Members this Year w/Email
- Board Member - Assigned to Solicitor - Joel Kristenson
- Companies that Match Donations
- Individual Donors Who Gave Both Last Year & This Year
- BUNT (Last Year But Unfortunately Not This)

Contacts [8 records found]

Incl	Last Name	First Name	Street	Street 2	City	State	Zip Code	Home Phone	Email	Contribution Total Last Year	Contribution Total This Year
<input checked="" type="checkbox"/>	Aakhus	Ariel	1709 8th St S	Cpo 3010	Moorhead	MN	56560	(218) 825-9215	Ariel@Aakhusxxx.com	620.00	500.00
<input checked="" type="checkbox"/>	Aakhus	Steven	19981 See Gull Rd		Brainerd	MN	56401	(218) 828-9215	Steven@Aakhus.com	1,050.00	50.00
<input checked="" type="checkbox"/>	Anderson	Gloria	9045 Larkspur Ln		Eden Prairie	MN	55347	(952) 944-7034	Tom@Galentine.com	200.00	45.00
<input checked="" type="checkbox"/>	Galentine	Tom	2956 County 120 Rd NE	Apt 68	Stewartville	CT	06500	(507) 533-8426	Tom@Galentine.com	190.00	115.00
<input checked="" type="checkbox"/>	Kristenson	Joel	9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427	(218) 442-1919	jkristenson@trailblz.com	33,658.00	77,761.15
<input checked="" type="checkbox"/>	Silvers	Denise	620 Mendelsoohn Ave N	Suite 186	Golden Valley	MN	55427-4350		denise.and.john@email.com	100.00	500.00
<input checked="" type="checkbox"/>	Uecker	Lynn	1340 Evergreen Pl		Mayer	MN	55360	(952) 237-8029		70.00	75.00
<input checked="" type="checkbox"/>	Zwack	James	5419 50th Ave N		Crystal	CT	06500	(763) 536-8626	James@Zwack.com	1,015.00	500.00
										36,903.00	79,546.15

Since it's a dynamic search favorite the counts will change depending on what data meets the search criteria at the time it's run.

The **related resources** below link to a wide variety of articles and videos that are related to this topic. *If you ever need a hand building queries, or anything else for that matter, please reach out to our live support team.*



Trail Blazer™

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

Related Resources

Article: [Delete Saved Search Query](#)

Article: [SQL Wildcards](#)

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

Article: [Creating and Saving Default Formats for Reporting with the Grid](#)

Article: [Querying by Email](#)

Article: [How to Use the New Dashboard Features – Adding Graphs and Metrics with Drag-and-Drop](#)

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

Article: [Add Attributes, Attribute Dates, and Attribute Notes to the Grid by Formatting them in as Columns](#)

Article: [What Donors Have Increased Giving Over Last Year](#)

Video: [Getting Started 102 – Beginning Queries](#)

Video: [Favorites Deleting Saved Queries](#)

Video: [Getting Started 104 – Queries with Wildcards](#)

Video: [Favorite - Update and Delete a Favorite](#)

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

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

Video: [Reporting 103 – Format with various contribution columns](#)

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

Trail Blazer Live Support

☎ **Phone:** 1-866-909-8700

✉ **Email:** support@trailblz.com

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.*