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Overview

This article picks up where [Events 2014 Part I](#) left off. This section digs deeper into managing **product/ticket** sales, **attendees**, and how to build a custom **shopping cart**. There are many links throughout to other related resources.

 **Tip:** *It may be easier to print out this article and follow along, or contact our support team to have someone go through the steps with you [1-866-909-8700](tel:1-866-909-8700) / support@trailblz.com*

Outline

#1 Managing Sale Orders and Event Attendees

#2 Querying Event Attendees

#3 Searching Product Sales (*Inventory/Reporting*)

#4 Build a Custom Shopping Cart

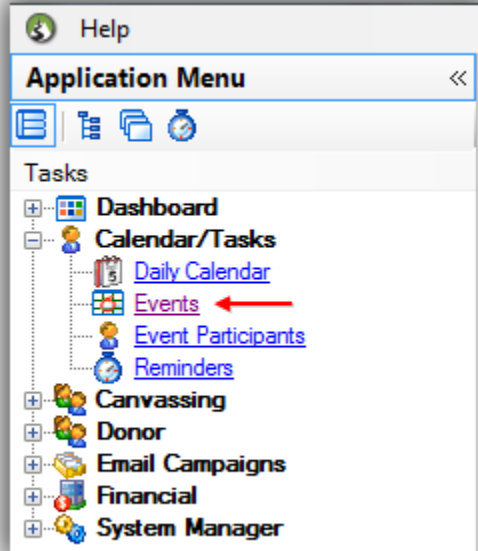
#5 Related Resources

 **Tip:** Use the **Ctrl+F** hot key to jump to different sections using keywords like **#1, #2, Related Resources**

#1 Managing Sale Orders and Event Attendees

As people begin registering for events and ordering tickets/products you can work with the data in Trail Blazer in many different ways. This section will detail how sales orders and event attendees look inside the database and how you can [query](#) people by **Events, Orders, Products** and **RSVP Response**.

Navigate to the **Events** list.



Click **[Search]** to populate all events.



The screenshot shows the TrailBlazer Events management interface. At the top, there's a search bar and a toolbar with icons for Search, Reset, New, and various file operations. Below this, there are tabs for Favorites, General, and SQL. The 'General' tab is active, showing a sidebar with 'Events Active' and a list of filters (Today, This Week, This Month, This Year, Last 10 Days, Last 30 Days, Last 60 Days, Last 90 Days). The main area has fields for Name, Start Date, and End Date, each with a dropdown menu. Below these are checkboxes for 'Event tracks contributions' and 'Event is published to web'. At the bottom of the filter section, there are buttons for 'Export', 'Print', and 'Pivot'. A red box highlights these buttons, with a red arrow pointing to them from the text: '- Export as a .csv File', '- Print as a Report', and '- Run a Pivot Summary Report'. Below the filter section, there's a section for 'Events [10 records found]' with a 'Record Count' label. This section contains a table with columns: Incl, Event ID, Event Name, Start Date, End Date, City, State, Public, Track Contributions, Open Pledges, Contributions, Summary Count, and Close Registration Time. The table lists 10 events, with the 21st Annual Golf Tournament highlighted in blue. A red arrow points from the 'Export', 'Print', and 'Pivot' buttons to the table, with the text 'Default Grid' below it.

Incl	Event ID	Event Name	Start Date	End Date	City	State	Public	Track Contributions	Open Pledges	Contributions	Summary Count	Close Registration Time
<input checked="" type="checkbox"/>	2	Gala Fundraiser	6/11/2011	6/11/2011	Minneapolis	MN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	860,896.00	351	6/10/2011 5:00 PM
<input checked="" type="checkbox"/>	9	2011 - Annual Appeal	7/1/2011	10/31/2011			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4,525.00	174,072.96	126	7/1/2011 12:10 PM
<input checked="" type="checkbox"/>	1	2012 - Capital Campaign	1/1/2012	12/31/2012			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	750.00	1,685,830.99	743	
<input checked="" type="checkbox"/>	47	2013 - Membership Renewal	1/1/2013	12/31/2013			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	148,280.00	229	
<input checked="" type="checkbox"/>	3	2014 - Membership Renewal	1/1/2014	12/31/2014			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	72,735.00	219	
<input checked="" type="checkbox"/>	15	2014 - Pledge Drive	11/1/2014	12/31/2014	Boise	ID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	300.00	.00	0	10/30/2014 12:00 AM
<input checked="" type="checkbox"/>	46	Webinar - Environmental Stewardship	1/1/2015	1/1/2015			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	0	1/1/2015 2:00 PM
<input checked="" type="checkbox"/>	14	Wine & Cheese Tasting	5/1/2015	5/2/2015	Silver Bay	MN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	0	4/29/2015 11:45 AM
<input checked="" type="checkbox"/>	20	21st Annual Golf Tournament	7/4/2015	7/4/2015	Golden Valley	MN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	250.00	3	7/3/2015 7:30 AM
<input checked="" type="checkbox"/>	28	Blazing Trails - The King's Trail	5/15/2020	5/25/2020	Abisko		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	4,617.00	1	5/8/2020 7:30 AM
<input checked="" type="checkbox"/>	10						5	10	5,575.00	2,946,681.95	1,672	

Default Grid

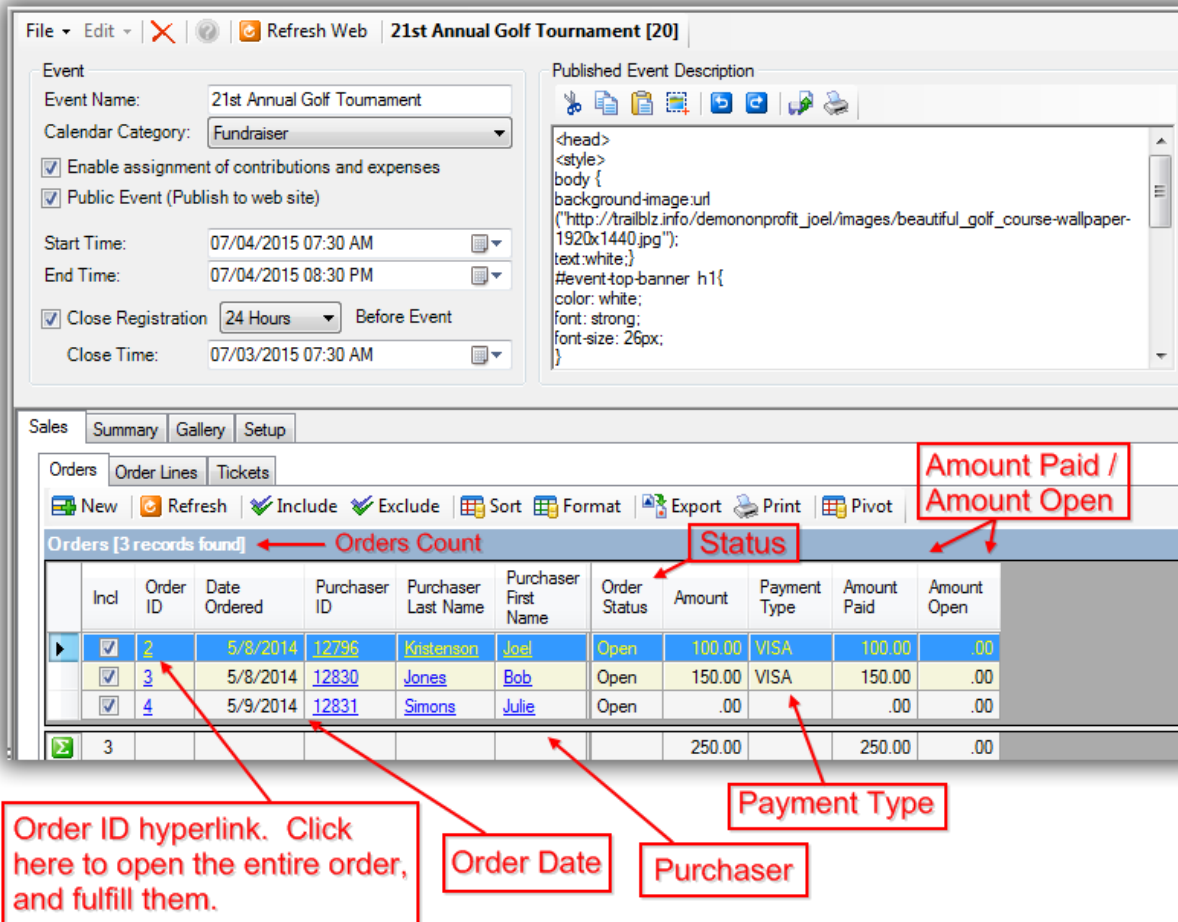
View details in the grid such as Event Name, Dates, Location, Pledges, Contributions (*sales/donations*), Summary Counts and which events have been published. You may adjust the columns to your needs by [Formatting](#). You may also [Print/Export](#) the results.

Click on any of the underlined blue links to open that event. *In my example I opened an event called "21st Annual Golf Tournament".*

Events [10 records found]													
	Incl	Event ID	Event Name	Start Date ▲	End Date	City	State	Public	Track Contributions	Open Pledges	Contributions	Summary Count	Close Registration Time
	<input checked="" type="checkbox"/>	2	Gala Fundraiser	6/11/2011	6/11/2011	Minneapolis	MN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	860,896.00	351	6/10/2011 5:00 PM
	<input checked="" type="checkbox"/>	9	2011 - Annual Appeal	7/1/2011	10/31/2011			<input type="checkbox"/>	<input checked="" type="checkbox"/>	4,525.00	174,072.96	126	7/1/2011 12:10 PM
	<input checked="" type="checkbox"/>	1	2012 - Capital Campaign	1/1/2012	12/31/2012			<input type="checkbox"/>	<input checked="" type="checkbox"/>	750.00	1,685,830.99	743	
	<input checked="" type="checkbox"/>	47	2013 - Membership Renewal	1/1/2013	12/31/2013			<input type="checkbox"/>	<input checked="" type="checkbox"/>	.00	148,280.00	229	
	<input checked="" type="checkbox"/>	3	2014 - Membership Renewal	1/1/2014	12/31/2014			<input type="checkbox"/>	<input checked="" type="checkbox"/>	.00	72,735.00	219	
	<input checked="" type="checkbox"/>	15	2014 - Pledge Drive	11/1/2014	12/31/2014	Boise	ID	<input type="checkbox"/>	<input checked="" type="checkbox"/>	300.00	.00	0	10/30/2014 12:00 AM
	<input checked="" type="checkbox"/>	46	Webinar - Environmental Stewardship	1/1/2015	1/1/2015			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	0	1/1/2015 2:00 PM
	<input checked="" type="checkbox"/>	14	Wine & Cheese Tasting	5/1/2015	5/2/2015	Silver Bay	MN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	0	4/29/2015 11:45 AM
	<input checked="" type="checkbox"/>	20	21st Annual Golf Tournament	7/4/2015	7/4/2015	Golden Valley	MN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	250.00	3	7/3/2015 7:30 AM
	<input checked="" type="checkbox"/>	28	Blazing Trails - The King's Trail	5/15/2020	5/25/2020	Abisko		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	4,617.00	1	5/8/2020 7:30 AM
	10							5	10	5,575.00	2,946,681.95	1,672	

The 1st screen you will see displays the **Sales > Orders** tab where you can view who the **purchaser** is, the **date** of the order, **payment type** (if applicable), as well as the **order status**. This is where you will fulfill orders as people make their payment(s).

*In my example my event displayed three different **Sales Orders** with a status of **Open**. Two were for a monetary value and one was for a free volunteer signup.*



The screenshot displays the TrailBlazer web application interface for the '21st Annual Golf Tournament'. The top section shows event details, including the event name, calendar category, and start/end times. Below this, the 'Sales' section is active, showing a table of orders. Red callout boxes highlight specific features:

- Order ID hyperlink:** Click here to open the entire order, and fulfill them.
- Order Date:** The date the order was placed.
- Purchaser:** The name of the person who placed the order.
- Payment Type:** The method of payment used.
- Status:** The current status of the order.
- Amount Paid / Amount Open:** The amount paid and the amount still open.

Incl	Order ID	Date Ordered	Purchaser ID	Purchaser Last Name	Purchaser First Name	Order Status	Amount	Payment Type	Amount Paid	Amount Open
<input checked="" type="checkbox"/>	2	5/8/2014	12796	Kristenson	Joel	Open	100.00	VISA	100.00	.00
<input checked="" type="checkbox"/>	3	5/8/2014	12830	Jones	Bob	Open	150.00	VISA	150.00	.00
<input checked="" type="checkbox"/>	4	5/9/2014	12831	Simons	Julie	Open	.00		.00	.00
3							250.00		250.00	.00

From here you have the ability to click the **[+ New]** button to manually create new **sale orders**.

Click on a pre-existing **order ID** to open, record payments and set the order status.

In my example I chose to open **Order ID 2** and fulfill it by entering the **amount shipped** and setting the order status to **complete**.

Sales											
Summary Gallery Setup											
Orders Order Lines Tickets											
New Refresh Include Exclude Sort Format Export Print Pivot											
Orders [3 records found]											
	Incl	Order ID	Date Ordered	Purchaser Last Name	Purchaser First Name	Purchaser Middle Name	Order Status	Amount	Payment Type	Amount Paid	Amount Open
	<input checked="" type="checkbox"/>	2	5/8/2014	Kristenson	Joel		Open	100.00	VISA	100.00	.00
	<input checked="" type="checkbox"/>	3	5/8/2014	Jones	Bob		Open	150.00	VISA	150.00	.00

Click on the Order ID hyperlink to open that order.

The next screen will display the **Order Lines** with related details. From here you can toggle between the **Tickets** and **Order Lines** tabs and you also have the ability to **[X] Delete** the entire **Sale Order** (*with utmost discretion*).

The image below shows details about the **sale order** screen.

Delete Order

Create New

Payment Amounts

Order Status

Ticket Orders

Order Line ID - click to open and record payments, quantity shipped, or to delete the order line.

Default Order Details

File Edit X ?

Date Ordered: 05/08/2014
Purchaser: Kristenson, Joel
Event Name: 21st Annual Golf Tournament
Payment Type: VISA
Order Status: Open

Before Discount: 100.00
Discount: .00
Order Amount: 100.00
Amount Paid: 100.00
Amount Open: .00

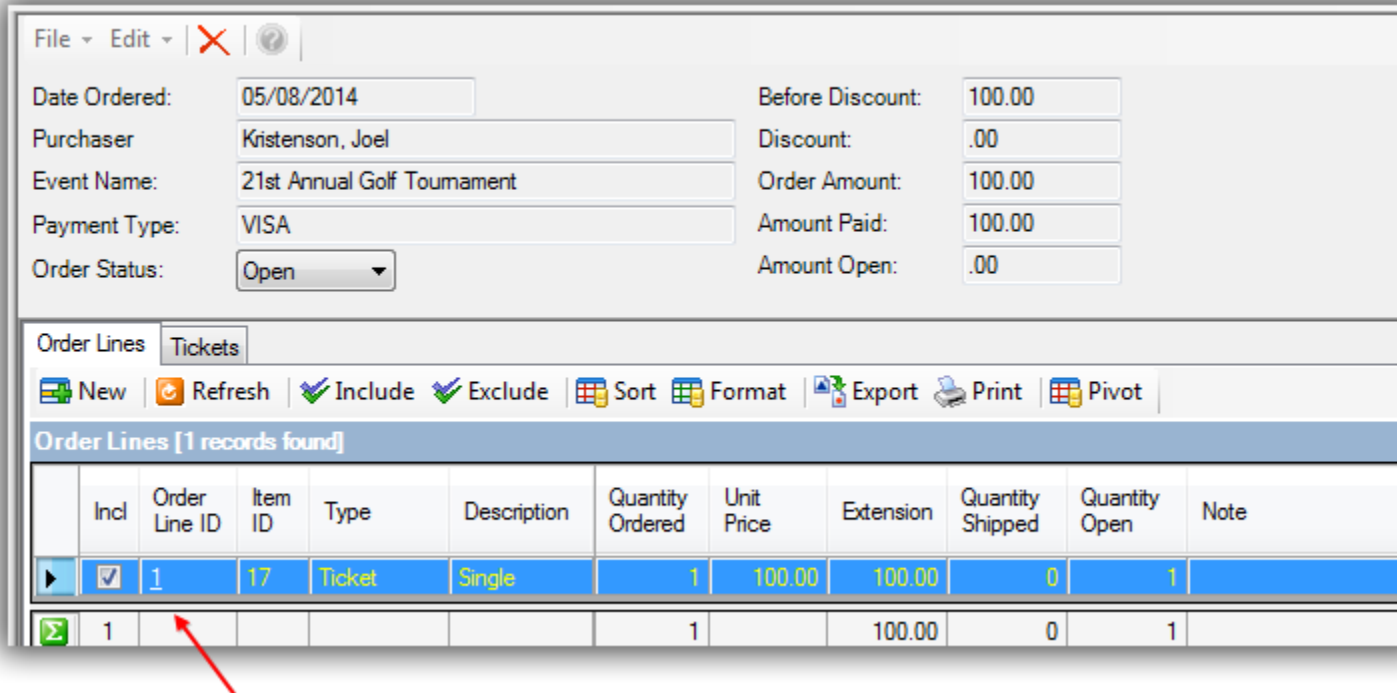
Order Lines Tickets

New Refresh Include Exclude Sort Format Export Print Pivot

Order Lines [1 records found]

Incl	Order Line ID	Item ID	Type	Description	Quantity Ordered	Unit Price	Extension	Quantity Shipped	Quantity Open	Note
<input checked="" type="checkbox"/>	1	17	Ticket	Single	1	100.00	100.00	0	1	
Σ	1				1		100.00	0	1	

Click the **Order Line ID** [hyperlink](#) to open. In my example I selected **Order Line ID #1** which was a **single ticket** that **required shipping** to complete.



File ▾ Edit ▾ | ✕ | ?

Date Ordered: 05/08/2014 Before Discount: 100.00
Purchaser: Kristenson, Joel Discount: .00
Event Name: 21st Annual Golf Tournament Order Amount: 100.00
Payment Type: VISA Amount Paid: 100.00
Order Status: Open Amount Open: .00

Order Lines Tickets

New Refresh Include Exclude Sort Format Export Print Pivot

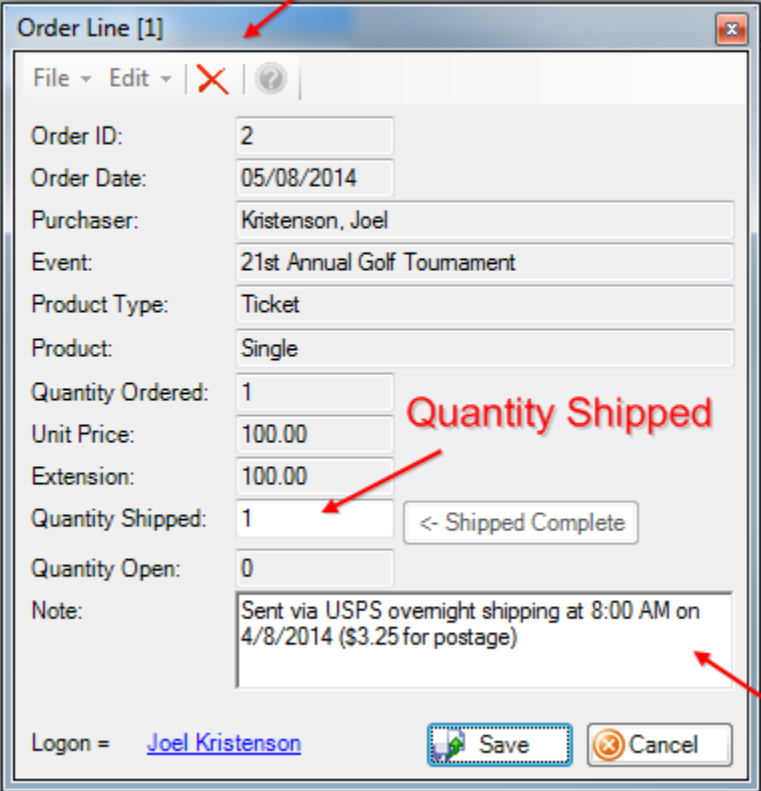
Order Lines [1 records found]

	Incl	Order Line ID	Item ID	Type	Description	Quantity Ordered	Unit Price	Extension	Quantity Shipped	Quantity Open	Note
▶	<input checked="" type="checkbox"/>	1	17	Ticket	Single	1	100.00	100.00	0	1	
Σ	1					1		100.00	0	1	

From the **Order Line** screen you can view details, mark the quantity shipped, record notes or delete the order.

*Below is my example of a completed order with the **quantity shipped** set to 1 and a note.*

Delete Order Line (with utmost discretion)



The screenshot shows the 'Order Line [1]' dialog box with the following fields and values:

Order ID:	2
Order Date:	05/08/2014
Purchaser:	Kristenson, Joel
Event:	21st Annual Golf Tournament
Product Type:	Ticket
Product:	Single
Quantity Ordered:	1
Unit Price:	100.00
Extension:	100.00
Quantity Shipped:	1
Quantity Open:	0

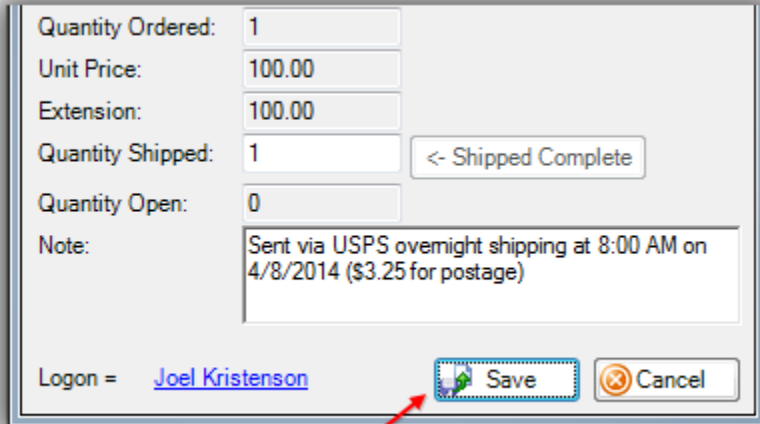
Additional elements in the dialog box include:

- A 'File' menu and a red 'X' icon.
- A 'Note' field containing: "Sent via USPS overnight shipping at 8:00 AM on 4/8/2014 (\$3.25 for postage)".
- A '<- Shipped Complete' button.
- A 'Logon =' field showing 'Joel Kristenson'.
- 'Save' and 'Cancel' buttons.

Red annotations with arrows point to the following elements:

- 'Delete Order Line (with utmost discretion)' points to the red 'X' icon.
- 'Quantity Ordered' points to the 'Quantity Ordered' field.
- 'Quantity Shipped' points to the 'Quantity Shipped' field.
- 'Quantity Open' points to the 'Quantity Open' field.
- 'Notes' points to the 'Note' field.

Click **[Save]** to update the **Order Line** or **[Cancel]** to close without making changes.



Quantity Ordered: 1

Unit Price: 100.00



Extension: 100.00

Quantity Shipped: 1 <- Shipped Complete

Quantity Open: 0



Note: Sent via USPS overnight shipping at 8:00 AM on 4/8/2014 (\$3.25 for postage)

Logon = [Joel Kristenson](#)

 Save  Cancel










After entering the quantity **Shipped** you will need to click the **Order Status** drop-down and select **Completed**.

Alternately you may choose to do this at a later time if multiple products/tickets need to be shipped and paid for or if the order gets canceled you can also mark it as such.



File ▾ Edit ▾ |  | 

Date Ordered: 05/08/2014 Before Discount: 100.00
Purchaser: Kristenson, Joel Discount: .00
Event Name: 21st Annual Golf Tournament Order Amount: 100.00
Payment Type: VISA Amount Paid: 100.00
Order Status: Open ▾ Amount Open: .00
Open
Completed
Cancelled

Order Lines Tickets

 New  Refresh  Include  Exclude  Sort  Format  Export  Print  Pivot

0 records found. Transferring...

	Incl	Order Line ID	Item ID	Type	Description	Quantity Ordered	Unit Price	Extension	Quantity Shipped	Quantity Open	Note
	<input checked="" type="checkbox"/>	1	17	Ticket	Single	1	100.00	100.00	1	0	Sent via USPS over...
	1					1		100.00	0	1	

Once you set the **Order Status** to **Completed** click **[Save and Close]** in the bottom right to finish.

File ▾ Edit ▾ | ✕ | ?

Date Ordered: 05/08/2014 Before Discount: 100.00
 Purchaser: Kristenson, Joel Discount: .00
 Event Name: 21st Annual Golf Tournament Order Amount: 100.00
 Payment Type: VISA Amount Paid: 100.00
 Order Status: Completed ▼ Amount Open: .00

Order Lines Tickets

New Refresh Include Exclude Sort Format Export Print Pivot

0 records found. Transferring...

	Incl	Order Line ID	Item ID	Type	Description	Quantity Ordered	Unit Price	Extension	Quantity Shipped	Quantity Open	Note
▶	<input checked="" type="checkbox"/>	1	17	Ticket	Single	1	100.00	100.00	1	0	Sent via USPS over..
Σ	1					1		100.00	1	0	

Logon = Joel Kristenson

Save Save and Close Cancel

Back in the **Sales > Orders** tab of the event the order status will display as **completed**.

Sales Summary Gallery Setup

Orders Order Lines Tickets

New Refresh Include Exclude Sort Format Export Print Pivot

Orders [3 records found]

	Incl	Order ID	Date Ordered	Purchaser ID	Purchaser Last Name	Purchaser First Name	Order Status	Amount	Payment Type	Amount Paid	Amount Open
	<input checked="" type="checkbox"/>	2	5/8/2014	12796	Kristenson	Joel	Completed	100.00	VISA	100.00	.00
	<input checked="" type="checkbox"/>	3	5/8/2014	12830	Jones	Bob	Open	150.00	VISA	150.00	.00
	<input checked="" type="checkbox"/>	4	5/9/2014	12831	Simons	Julie	Open	.00		.00	.00
	3							250.00		250.00	.00

To view a list of everyone who's signed up for the event click on the **Summary** tab.

Sales Summary Gallery Setup

New Refresh Include Exclude

Donors [3 records found]

From here you can:

- **Add New** Attendees Manually
- **View Details** in the Grid
- **Filter** by Response / Financial Status / Attendance Status
- [Print/Export](#) & [Run Pivot \(Summary\) Reports](#)

- **Update/Delete** attendees under the [RSVP Response](#) Link (*explained below*)

Image 1 of 2 | Summary Tab

Add New →

Sales Summary Gallery Setup													
New Refresh Include Exclude Sort Format Export Print Pivot Response Financial Attendance													
Donors [3 records found] ← Attendee Count													
	Incl	Donor Event ID	Donor ID	Last Name	First Name	Date Created	RSVP Response	Date Responded	Tickets Purchased	Tickets Under Name	Did They Attend	Pledged	Open Pledges
▶	<input checked="" type="checkbox"/>	2737	12830	Jones	Bob	5/8/2014	Yes		1	1		.00	.00
	<input checked="" type="checkbox"/>	2736	12796	Kristenson	Joel	5/8/2014	Yes	5/20/2014	1	1	Yes	.00	.00
	<input checked="" type="checkbox"/>	2738	12831	Simons	Julie	5/9/2014	Yes		1	1		.00	.00
Σ									3	3		.00	.00

↙ ↘
Default Attendee Details

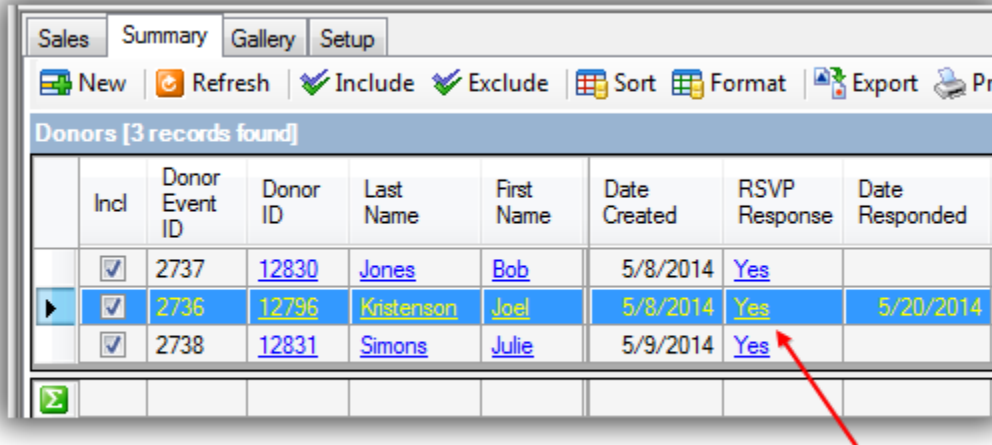
Click on the RSVP link to delete an attendee, update their RSVP status, set their role, record notes, and to mark if they attended or not.

Image 2 of 2 | Summary Tab

Contributed	Open Pledges + Contributed	Participant Role	Employer	User 1	User 2	Comment	Email
150.00	150.00	Other				Online Ticket Purchase	support@trailblz.com
100.00	100.00	Volunteer	Trail Blazer Campaign Services, LLC			- Online Ticket Purchase- Delegated Volunteer Activities	jkristenson@trailblz.com
.00	.00	Other				Online Ticket Purchase	support@trailblz.com
250.00	250.00						

If you click on the blue [link](#) under **RSVP Response** you can:

- **Delete** the Attendee
- Set the **RSVP Response** and **Date of Response**
- Set **Actually Attend** Status
- Set **Role**
- Record Notes within **User1** and **User2** Custom Fields
- Record **Comments**



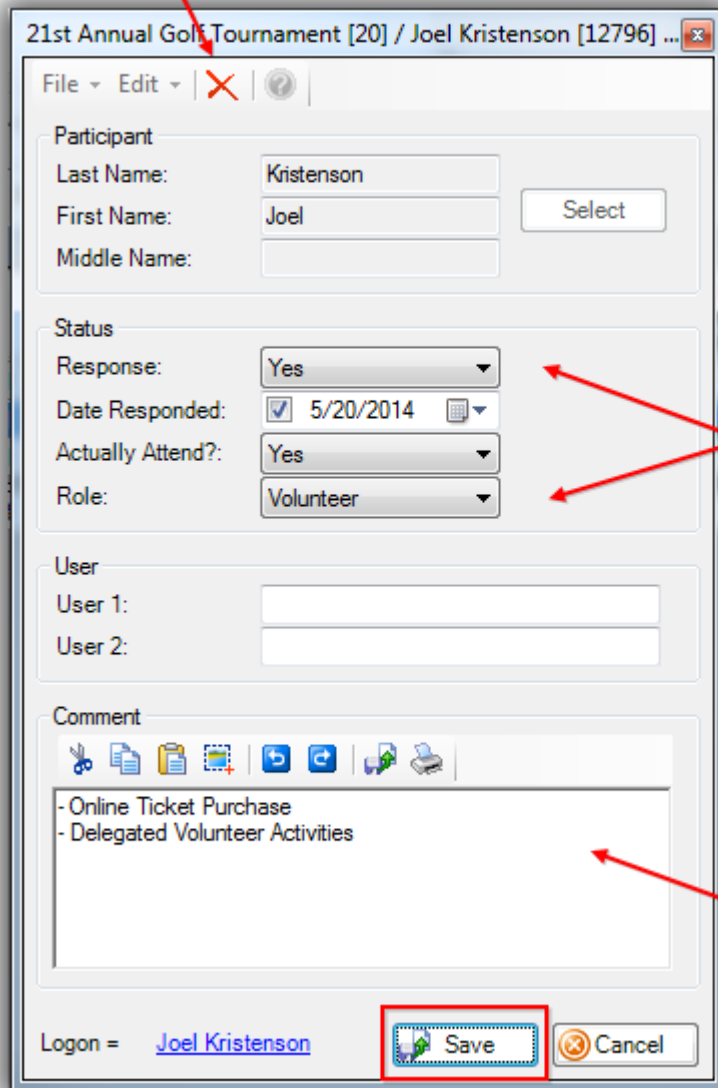
The screenshot shows a web application interface with a table titled "Donors [3 records found]". The table has columns: Incl, Donor Event ID, Donor ID, Last Name, First Name, Date Created, RSVP Response, and Date Responded. There are three records. The second record is highlighted in blue, and a red arrow points to the "Yes" link in the "RSVP Response" column.

	Incl	Donor Event ID	Donor ID	Last Name	First Name	Date Created	RSVP Response	Date Responded
	<input checked="" type="checkbox"/>	2737	12830	Jones	Bob	5/8/2014	Yes	
▶	<input checked="" type="checkbox"/>	2736	12796	Kistenson	Joel	5/8/2014	Yes	5/20/2014
	<input checked="" type="checkbox"/>	2738	12831	Simons	Julie	5/9/2014	Yes	

Open and Set RSVP Response

The image below is a detailed *example* of a participant for my event.

Delete Participant



21st Annual Golf Tournament [20] / Joel Kristenson [12796] ...

File Edit

Participant

Last Name: Kristenson
First Name: Joel
Middle Name:

Select






Status

Response: Yes
Date Responded: ☒ 5/20/2014
Actually Attend?: Yes
Role: Volunteer

User

User 1:
User 2:

Comment

- Online Ticket Purchase
- Delegated Volunteer Activities

Logon = Joel Kristenson

Save Cancel

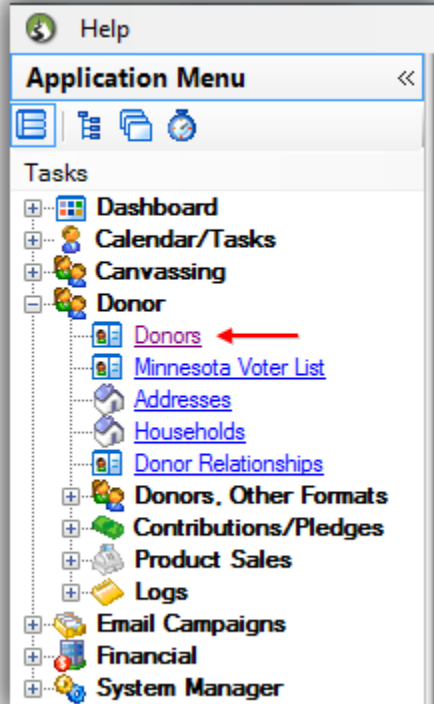
Click **[Save]** after making adjustments or **[Cancel]** to close.

#2 Querying Event Attendees

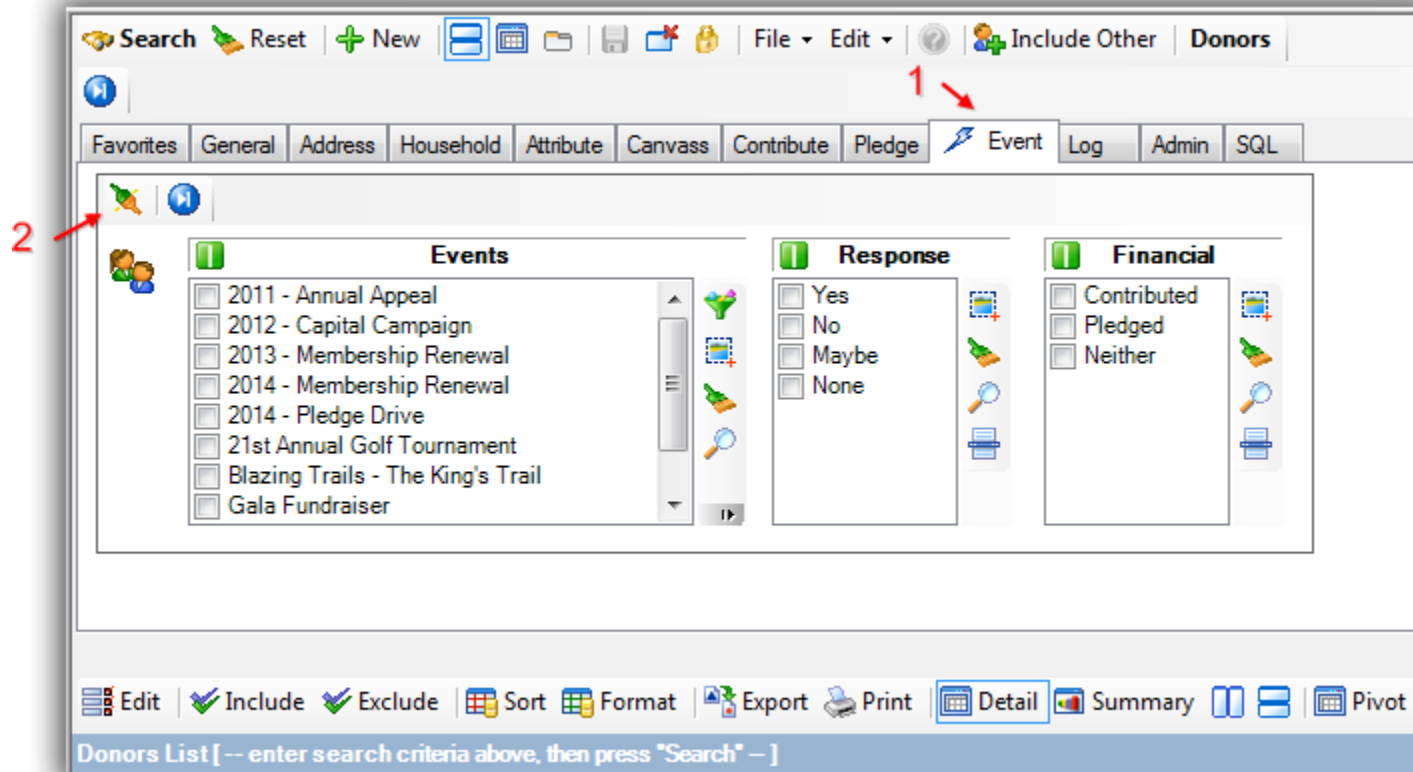
There're a few different ways to search for event attendees. One would be from the contact list (voters/donors) and the other would be from within the event itself, under the **Summary** tab.

The 2 options are detailed below starting by searching from the contacts list.

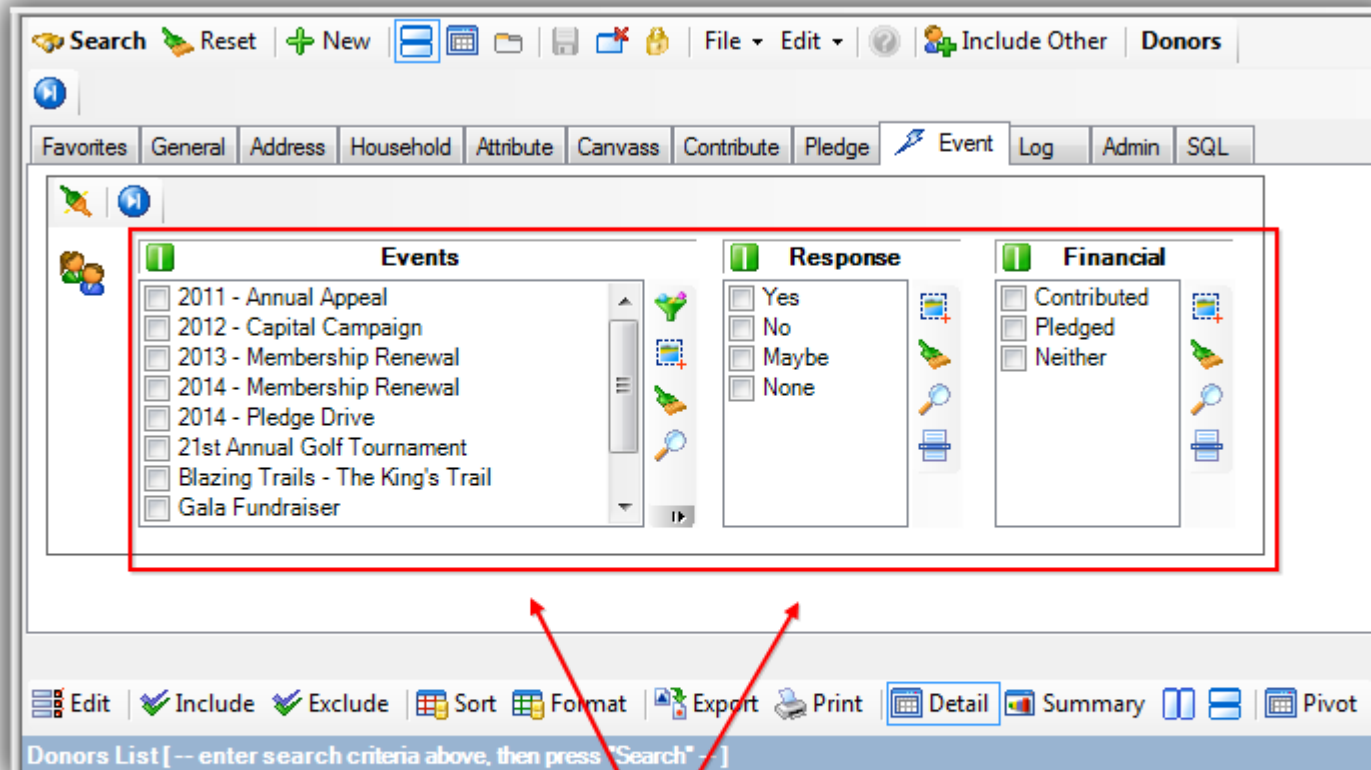
Navigate to the **donor/voter** list. *In this example I used a nonprofit database.*



Click on the **Event** tab and **plug** it in.



From here you can check boxes for the different **events** to search by - you can also filter by **Response** and **Financial** (i.e. if someone contributed financially to the event such as a ticket/product purchase or a donation.)



Query for contacts by event name, response, and/or financial status.

[Create filtered column reports](#) to see how much donors have given by event (if you want a really neat report you can filter by both event and by date range – an example of this would be to create a single membership event to tie money to, and filter a column for each year displaying membership dues paid).

The image below shows everyone who's signed up for my 21st Annual Golf event.

2

1

Events

- ☐ 2011 - Annual Appeal
- ☐ 2012 - Capital Campaign
- ☐ 2013 - Membership Renewal
- ☐ 2014 - Membership Renewal
- ☐ 2014 - Pledge Drive
- ☒ 21st Annual Golf Tournament
- ☐ Blazing Trails - The King's Trail
- ☐ Gala Fundraiser

Response

- ☐ Yes
- ☐ No
- ☐ Maybe
- ☐ None

Financial

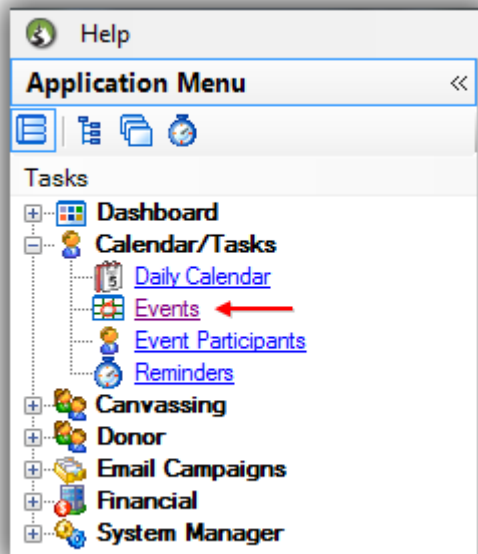
- ☐ Contributed
- ☐ Pledged
- ☐ Neither

Donors [3 records found]

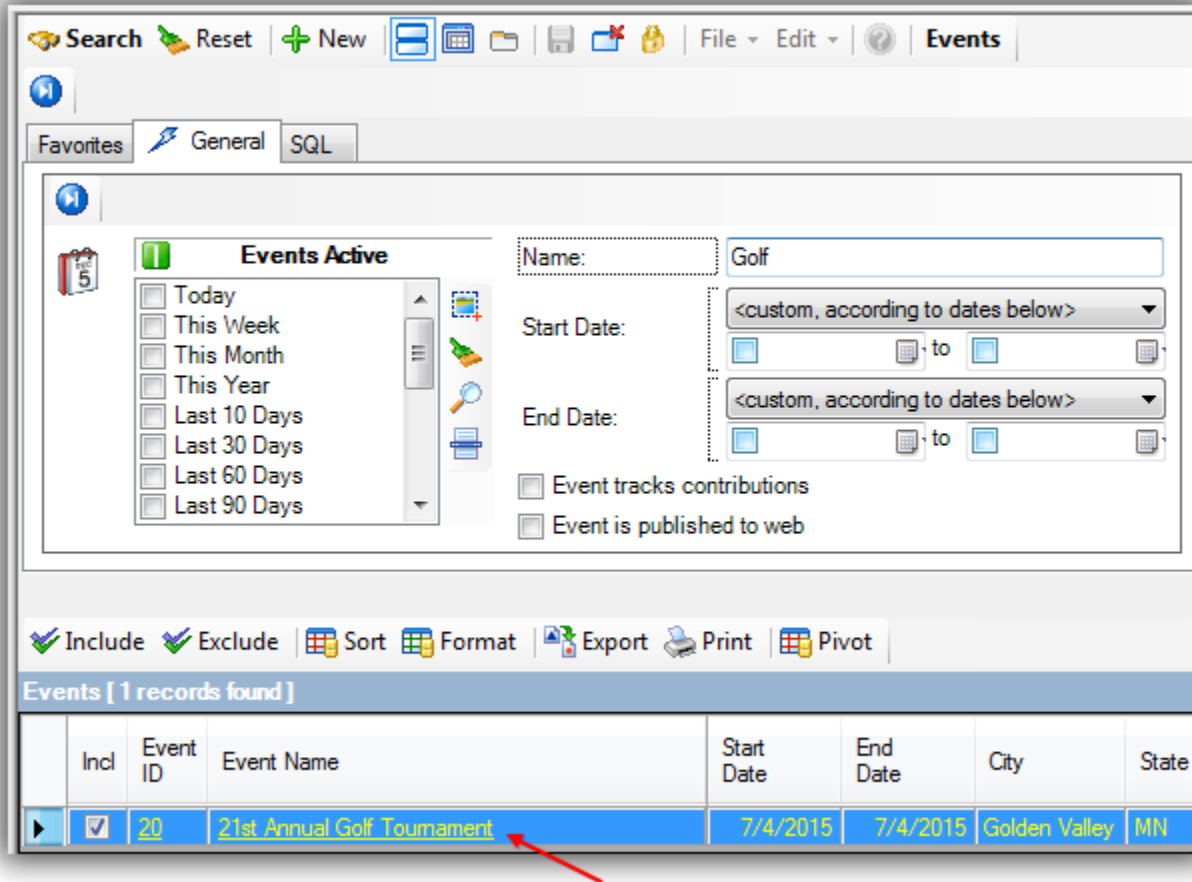
Incl	ID	Title	Last Name	First Name	MI	Address Type	Address	City	State	Zip Code
<input checked="" type="checkbox"/>	12830		Jones	Bob		Home	620 Mendelssohn Av ...	Golden Valley	MN	55427
<input checked="" type="checkbox"/>	12796	Mr.	Kristenson	Joel		Home	9110 Golden Valley ...	Golden Valley	MN	55426-4350
<input checked="" type="checkbox"/>	12831		Simons	Julie		Home	1448 Hennepin Ave	Minneapolis	MN	55418
Σ	3									

The other area you can search for event attendees would be from within that specific event record.

Navigate to the Events list.



Search for the event and open it. *I used the event 21st Annual Golf Tournament.*



Events Active

☐ Today
☐ This Week
☐ This Month
☐ This Year
☐ Last 10 Days
☐ Last 30 Days
☐ Last 60 Days
☐ Last 90 Days

Name:

Start Date:

End Date:

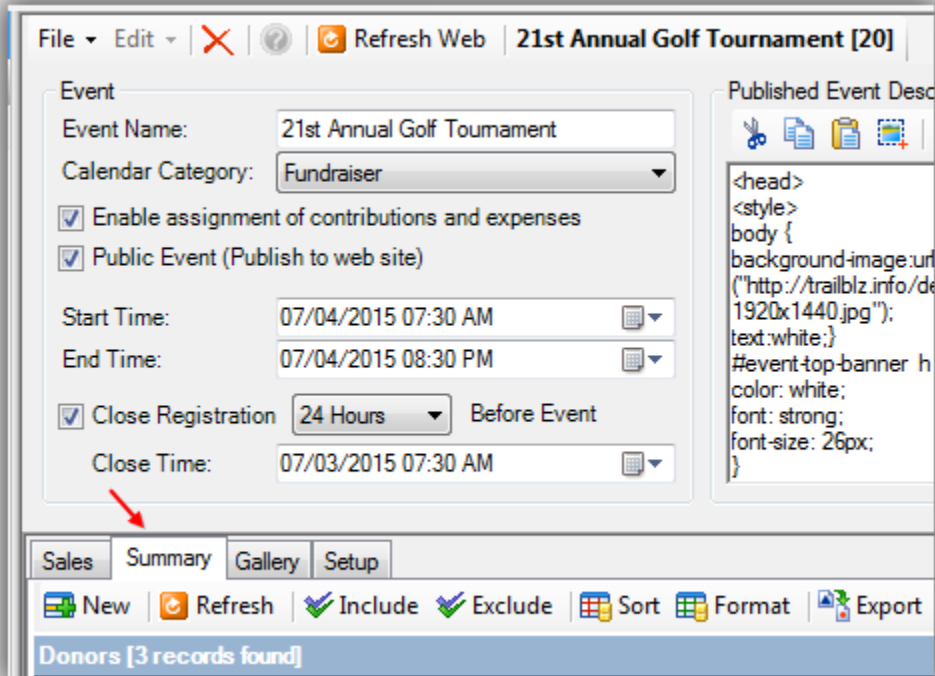
☐ Event tracks contributions
☐ Event is published to web

Include Exclude Sort Format Export Print Pivot

Events [1 records found]

Incl	Event ID	Event Name	Start Date	End Date	City	State
<input checked="" type="checkbox"/>	20	21st Annual Golf Tournament	7/4/2015	7/4/2015	Golden Valley	MN

Click on the **Summary** tab.



The screenshot shows the TrailBlazer web application interface for the '21st Annual Golf Tournament'. The interface includes a menu bar with 'File', 'Edit', and 'Refresh Web'. The main content area is divided into two sections: 'Event' and 'Published Event Description'.

Event Section:

- Event Name: 21st Annual Golf Tournament
- Calendar Category: Fundraiser
- ☒ Enable assignment of contributions and expenses
- ☒ Public Event (Publish to web site)
- Start Time: 07/04/2015 07:30 AM
- End Time: 07/04/2015 08:30 PM
- ☒ Close Registration: 24 Hours Before Event
- Close Time: 07/03/2015 07:30 AM

Published Event Description Section:

```
<head>
<style>
body {
background-image: url(
("http://trailblz.info/de
1920x1440.jpg");
text: white;
#event-top-banner h
color: white;
font: strong;
font-size: 26px;
}
```

At the bottom of the interface, there are tabs for 'Sales', 'Summary', 'Gallery', and 'Setup'. Below these tabs is a toolbar with icons for 'New', 'Refresh', 'Include', 'Exclude', 'Sort', 'Format', and 'Export'. The bottom status bar indicates 'Donors [3 records found]'.

This displays everyone who's associated with the event and displays details such as RSVP response, role, and how much money they've paid.

Default Summary Tab Details

Sales Summary Gallery Setup															
New Refresh Include Exclude Sort Format Export Print Pivot Response Financial Attendance															
Donors [3 records found]															
Incl	Last Name	First Name	MI	Date Created	RSVP Response	Date Responded	Tickets Purchased	Tickets Under Name	Did They Attend	Pledged	Open Pledges	Contributed	Open Pledges + Contributed	Participant Role	
<input checked="" type="checkbox"/>	Jones	Bob		5/8/2014	Yes		1	1		.00	.00	150.00	150.00	Other	
<input checked="" type="checkbox"/>	Kristenson	Joel		5/8/2014	Yes	5/20/2014	1	1	Yes	.00	.00	100.00	100.00	Volunteer	
<input checked="" type="checkbox"/>	Simons	Julie		5/9/2014	Yes		1	1		.00	.00	.00	.00	Other	
Σ							3	3		.00	.00	250.00	250.00		

You can filter this list by **Response**, **Financial**, and **Attendance**.

Filter Event Attendees

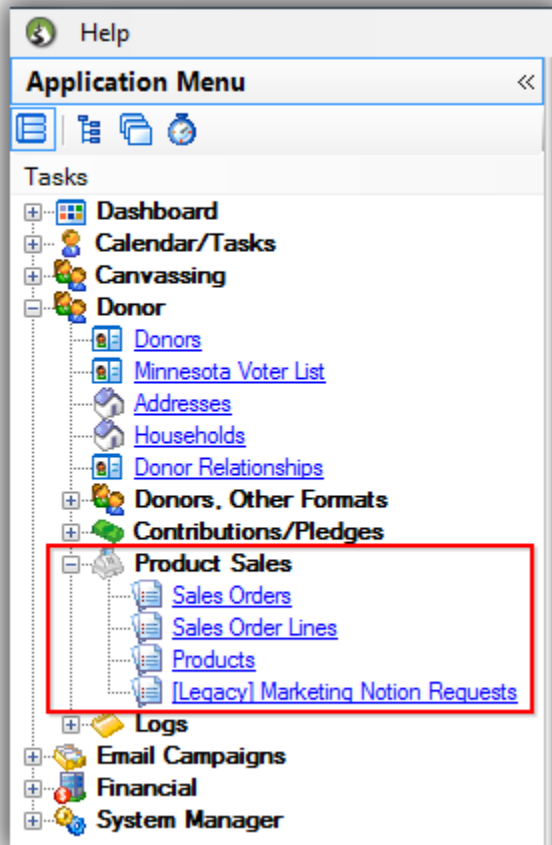
Summary Gallery Setup															
New Refresh Include Exclude Sort Format Export Print Pivot Response Financial Attendance															
s [3 records found]															
Incl	Last Name	First Name	MI	Date Created	RSVP Response	Date Responded	Tickets Purchased	Tickets Under Name	Did They Attend	Pledged	Open Pledges	Contributed			
<input checked="" type="checkbox"/>	Jones	Bob		5/8/2014	Yes		1	1		.00	.00	150			
<input checked="" type="checkbox"/>	Kristenson	Joel		5/8/2014	Yes	5/20/2014	1	1	Yes	.00	.00	100			
<input checked="" type="checkbox"/>	Simons	Julie		5/9/2014	Yes		1	1		.00	.00				
							3	3		.00	.00	250			

From here you could print or export the list and check people off at the door. You could also bring your laptop with as long as you have internet access.

The next section describes how to query and report on sale orders.

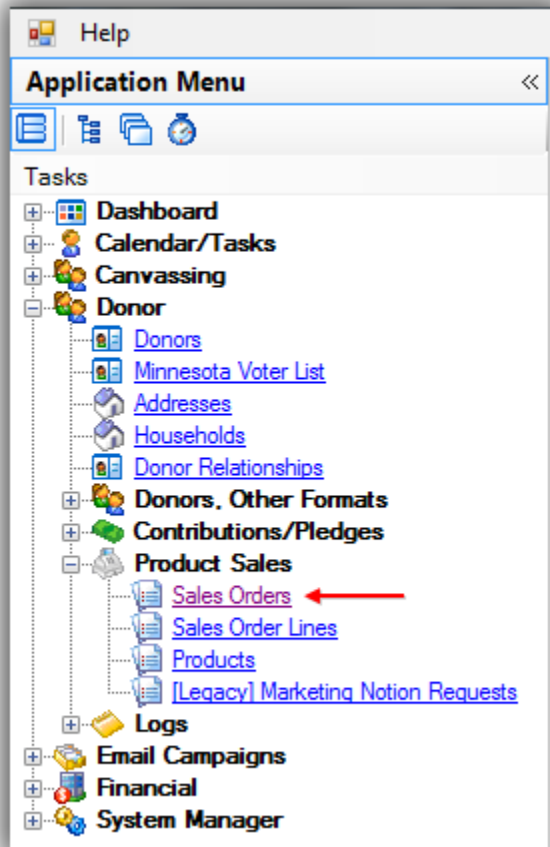
#3 Searching Product Sales (*Inventory/Reporting*)

Follow **Application Menu > Donor/Voter/Contact > Product Sales**



From here you can run reports in the **Sales Orders**, **Sale Order Lines** and **Products** lists.

Each one is listed below starting with **Sales Orders**.



Within this list you can search by:

- Order Status **Open**, **Completed** and **Cancelled**
- Date Range
- Event Name
- Payment Type

- Amount Range
- Unpaid Orders Only

The image below details what the **Sales Orders** list looks like by default.

Sales Orders List

Search Reset + New [Icons] File Edit ? Sales Orders

Favorites General Donor SQL

Status

☒ Open
☐ Completed
☐ Cancelled

Date Range: <custom, according to dates below>
 to

Event: <ignore>
 Payment Type: <ignore>
 Amount Range: minimum to maximum

☐ Unpaid orders only

Order Status **Unpaid Orders Only**

Query sales orders by:

- Date Range
- Event Name
- Payment Type
- Amount Ranges

Edit Include Exclude Sort Format Export Print Pivot

Sales Orders [3 records found]

	Incl	Order ID	Date Ordered	Purchaser Last Name	Purchaser First Name	Purchaser Middle Name	Order Status	Event Name	Amount	Payment Type	Amount Paid	Amount Open
▶	<input checked="" type="checkbox"/>	1	5/7/2014	Kristenson	Joel		Open	Wine & Cheese Tasting	.00	Purchase Order	.00	.00
	<input checked="" type="checkbox"/>	3	5/8/2014	Jones	Bob		Open	21st Annual Golf Tournament	150.00	VISA	150.00	.00
	<input checked="" type="checkbox"/>	4	5/9/2014	Simons	Julie		Open	21st Annual Golf Tournament	.00		.00	.00
Σ	3								150.00		150.00	.00

If you click on any of the **Order ID** links you can open that specific **order** to set it as **complete**, apply **payments** or **delete** it.

Image 1 of 2 – Sales Orders List

Edit Include Exclude Sort Format Export Print Pivot													
Sales Orders [4 records found]													
	Incl	Order ID	Purchaser Donor ID	Date Ordered	Purchaser Last Name	Purchaser First Name	Order Status	Event ID	Event Name	Amount	Payment Type	Amount Paid	Amount Open
	<input checked="" type="checkbox"/>	1	12796	5/7/2014	Kristenson	Joel	Open	14	Wine & Cheese Tasting	.00	Purchase Order	.00	.00
	<input checked="" type="checkbox"/>	3	12830	5/8/2014	Jones	Bob	Open	20	21st Annual Golf Tournament	150.00	VISA	150.00	.00
	<input checked="" type="checkbox"/>	4	12831	5/9/2014	Simons	Julie	Open	20	21st Annual Golf Tournament	.00		.00	.00
	<input checked="" type="checkbox"/>	5	12796	5/19/2014	Kristenson	Joel	Open	28	Blazing Trails - The Kings Trail	2,308.50	VISA	2,308.50	.00
Σ	4									2,458.50		2,458.50	.00

Click on any of the Order ID links to open that order to make payments, set the status as complete or delete it.

Image 2 of 2 – Sale Order

File ▾ Edit ▾ ✕ ⓘ

Date Ordered: 05/07/2014
Purchaser: Kristenson, Joel [Update](#)
Event Name: Wine & Cheese Tasting ▾
Payment Type: Purchase Order
Order Status: Open ▾

Before Discount: .00
Discount: .00
Order Amount: .00
Amount Paid: .00
Amount Open: .00

Order Lines Tickets

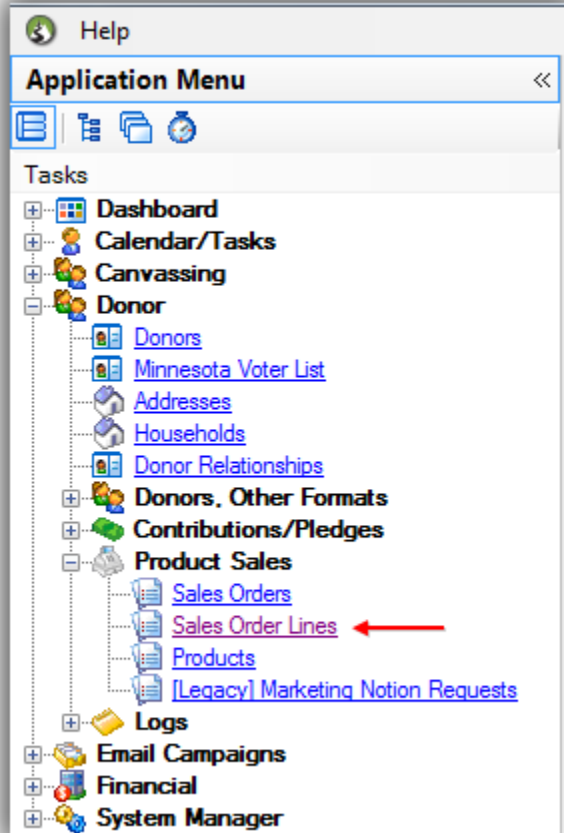
New Refresh Include Exclude Sort Format Export Print Pivot

Order Lines [0 records found]

Incl	Order Line ID	Type	Description	Quantity Ordered	Unit Price	Extension	Quantity Shipped	Quantity Open	Note
Σ	0			0		.00	0	0	

Logon = [Joel Kristenson](#)
Save Save and Close Cancel

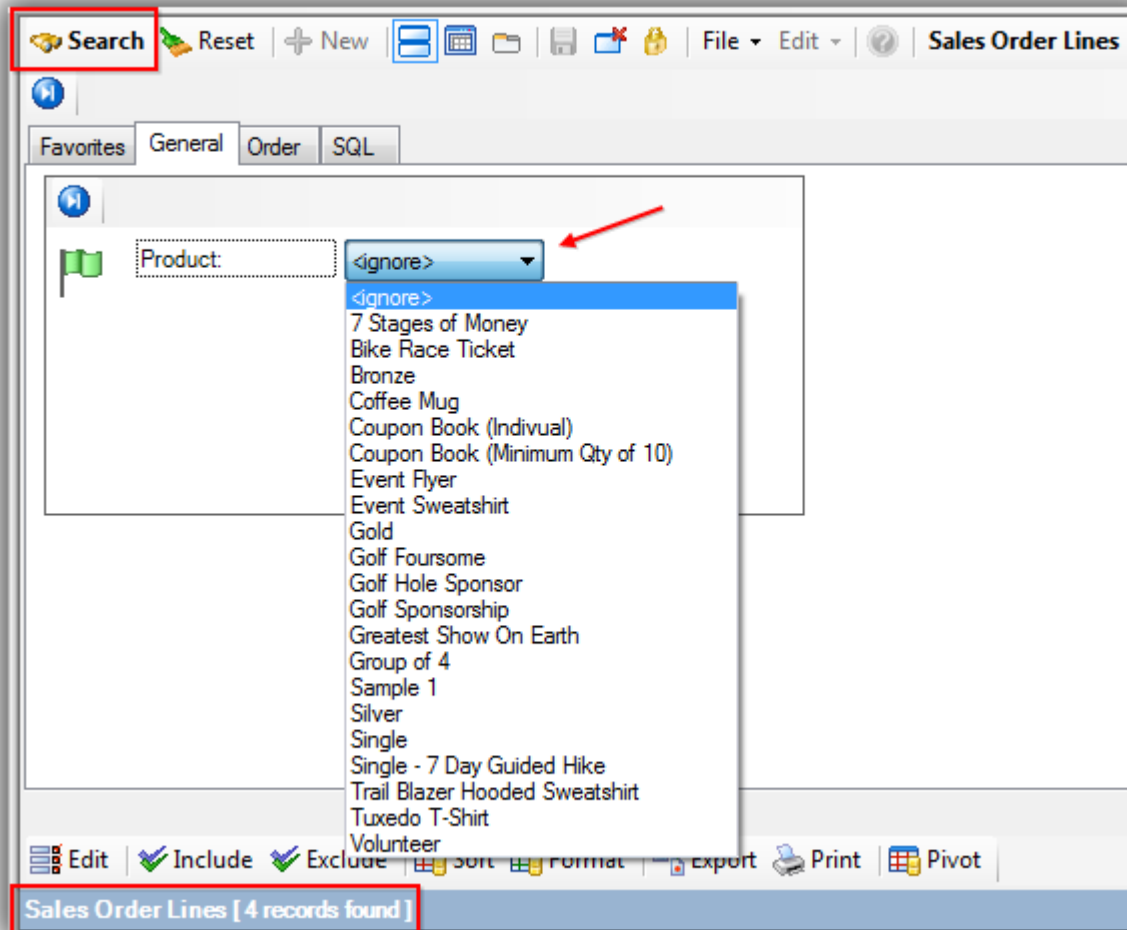
The next list is called **Sales Order Lines**.



From here you can search by a specific **Product** by clicking the drop down or leave it empty to search all products.

General Tab

Search Products

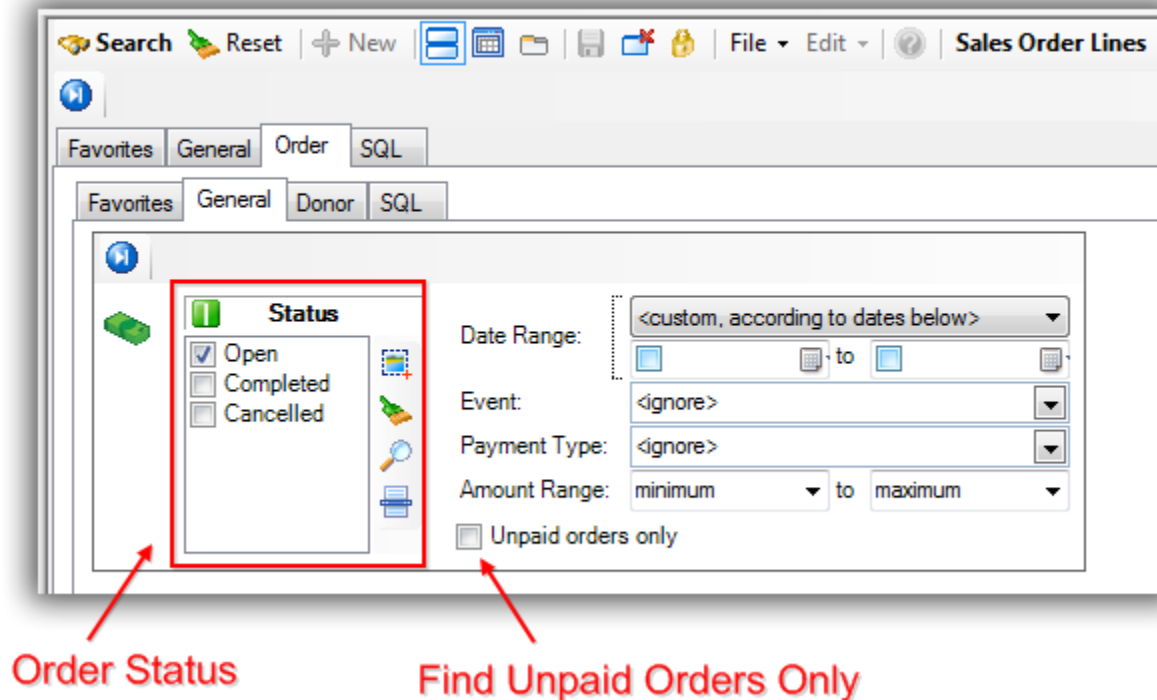


By **default** the **Order** tab and the **General** sub-tab will have the status set to display **open** sale orders. You can adjust that status and query by date range, event, unpaid orders only and amount ranges.

The images below detail each search tab of the Sales Orders list and how they appear by default.

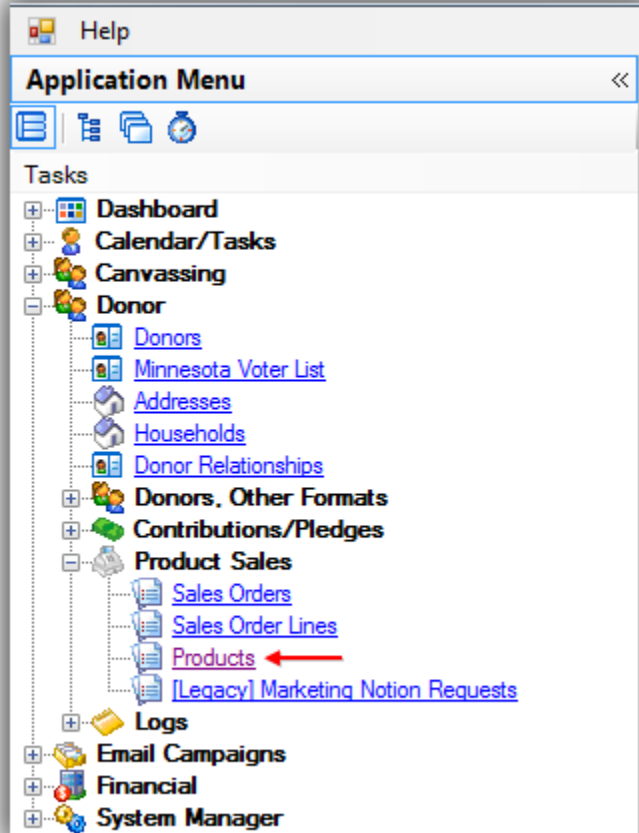
Order > General

Sales Order Lines > Order > General



The grid will display columns related to products, if you want to get a summary report by product, set a date range and use the [pivot](#) function.

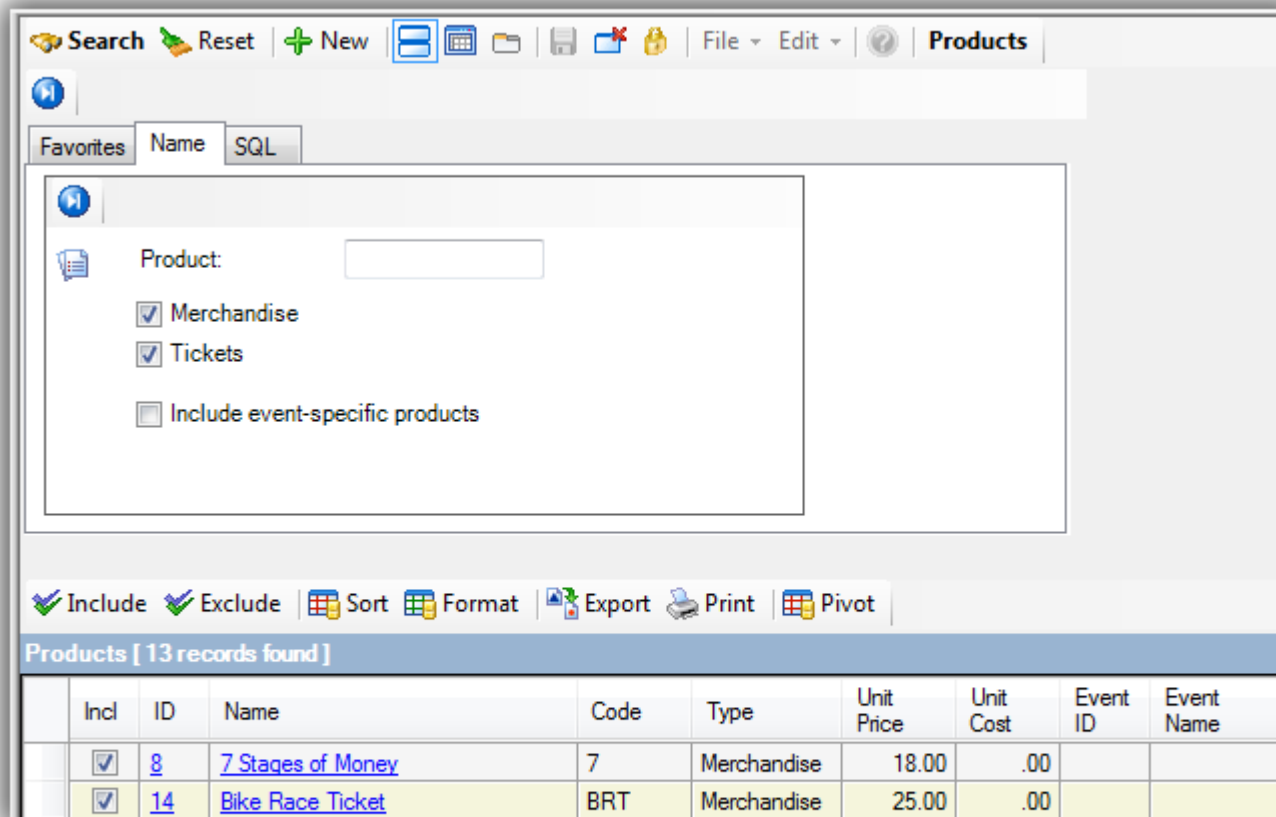
The last list under **Product Sales** is the **Products** list.



From here you can:

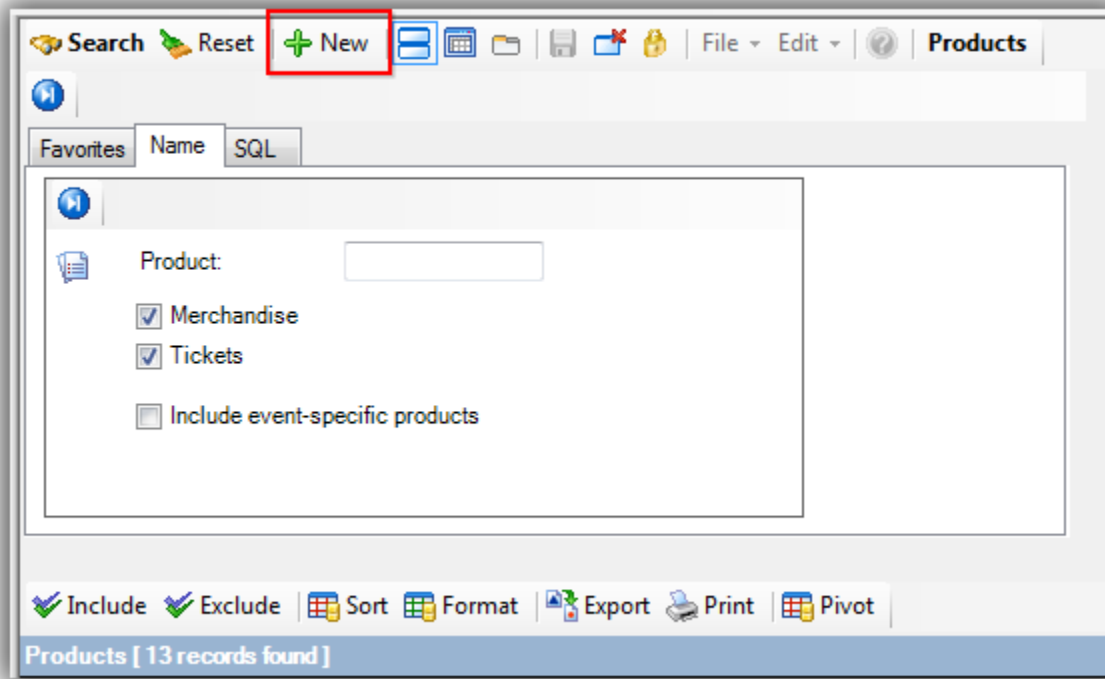
- Query by specific **products, merchandise/tickets** and/or **event-specific products**
- Add new **products** to your global list of products or update current ones
- View details on your current products (i.e. **name, code, type, price, cost** and related **event**)

The image below is what the Products list grid looks like by default.



Default Grid

To create a **new** product click **[+ New]** from the search tool strip.



From the **Create New Product** screen you can:

- Create a description
- Set the flag if the item is considered shipped when ordered
- Set the flag if the item has free shipping
- Set the flag if the item is tax exempt
- Create a product code
- Set the unit price
- Set the unit cost

- Set the handling fee
- Set the quantity on hand
- Set the max order quantity
- **Optionally* add an image and copy HTML/JavaScript for a custom online shopping cart

The image below will show a sample product record.

*In my example I created a product called **Trail Blazer Sweatshirt**.*

Trail Blazer Hooded Sweatshirt (24) Product Card

File Edit Trail Blazer Hooded Sweatshirt [24]

Description:	Trail Blazer Sweatshirt
Type:	Merchandise
Event:	
Code:	TBZ_Sweatshirt
Unit Price:	65.00
Unit Cost:	25.00
Handling Fee:	3.25
Quantity On Hand:	25
Max Per Order:	3

☐ Item is considered shipped when ordered -- no further fulfillment is required
☐ Item has free shipping
☐ Item is tax exempt

Details for new product.

HTML Image

(Buy Now) Button HTML code, Copy/Paste into your website.

Step 1) Copy JavaScript Step 2) Copy Html

```

<form name="cartbutton-24" onsubmit='javascript:addtocart(this);location.href=fullurl.va
<div>
<div>Trail Blazer Hooded Sweatshirt</div>
<span>QTY</span>
<input type="hidden" name="clientid" value="DemoNonprofit_Joel" />
<input type="hidden" name="notionid" value="24" />
<input type="hidden" name="returnurl" value="http://www.ReplaceThisDomain.com/" />
<input type="hidden" name="confirmurl" value="http://www.ReplaceThisDomain.com/thankyou..
<input type="hidden" name="fullurl" />
<input name="qty" value="1" size="3" type="text" />
<input src="images/addtocart.png" type="image" alt="Add To Cart" name="_AddToCart" />
</div>
    
```

Logon = [Joel Kristenson](#) Save Save and Close Cancel

JavaScript and Html code for this product to

Click **[Save and Close]** to finish creating your new product.

Click **[Search]** to refresh the list.

1

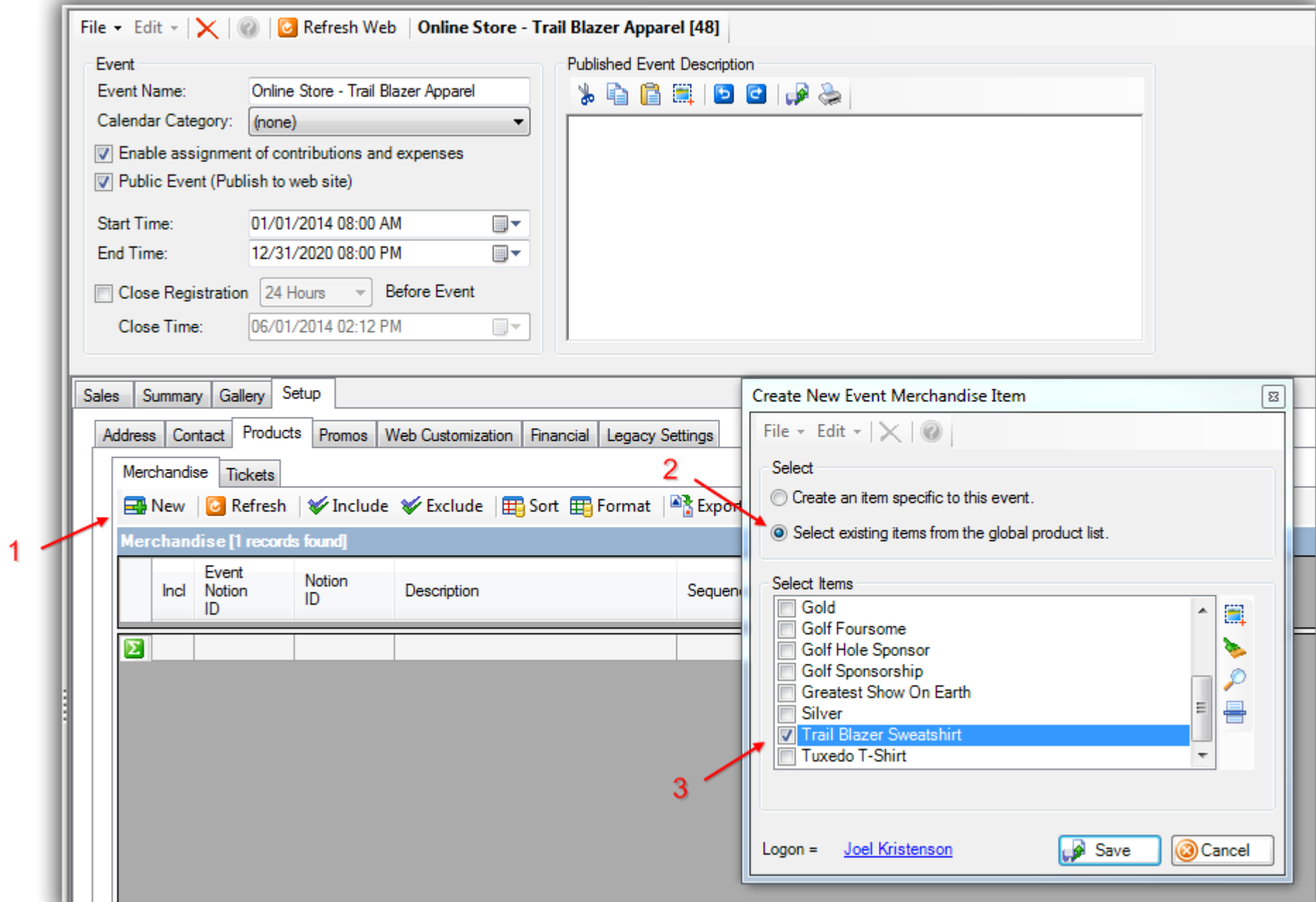
The screenshot shows the TrailBlazer 'Products' window. The top toolbar includes buttons for Search, Reset, New, and various file operations. Below the toolbar, there are tabs for Favorites, Name, and SQL. A sidebar on the left contains a 'Product:' input field and checkboxes for 'Merchandise', 'Tickets', and 'Include event-specific products'. The main area displays a table of products with columns: Incl, ID, Name, Code, Type, Unit Price, Unit Cost, Event ID, and Event Name. The table contains 14 records, with the first five visible. A red arrow points to the 'Bike Race Ticket' row (ID 14).

Incl	ID	Name	Code	Type	Unit Price	Unit Cost	Event ID	Event Name
<input checked="" type="checkbox"/>	24	Trail Blazer Sweatshirt	TBZ_Sweatshirt	Merchandise	65.00	25.00		
<input checked="" type="checkbox"/>	14	Bike Race Ticket	BRT	Merchandise	25.00	.00		
<input checked="" type="checkbox"/>	13	Greatest Show On Earth	GSE	Merchandise	179.00	.00		
<input checked="" type="checkbox"/>	12	Golf Hole Sponsor	ghs	Merchandise	100.00	.00		
<input checked="" type="checkbox"/>	11	Golf Foursome	GF	Merchandise	500.00	.00		

New product - you can open and make adjustments in the future.

When creating events you will now have the option to choose these products from your **Global List** of products.

*The image below is an example taken from within an **Event** record card.*



Event

Event Name:

Calendar Category:

☒ Enable assignment of contributions and expenses

☒ Public Event (Publish to web site)

Start Time:

End Time:

☐ Close Registration Before Event

Close Time:

Published Event Description

Sales Summary Gallery Setup

Merchandise Tickets

☒ New ☐ Refresh ☒ Include ☒ Exclude ☐ Sort ☐ Format ☐ Export

Merchandise [1 records found]

Incl	Event Notion ID	Notion ID	Description	Sequence
<input checked="" type="checkbox"/>				

Create New Event Merchandise Item

File Edit X ?

Select

☐ Create an item specific to this event.

☒ Select existing items from the global product list.

Select Items

- ☐ Gold
- ☐ Golf Foursome
- ☐ Golf Hole Sponsor
- ☐ Golf Sponsorship
- ☐ Greatest Show On Earth
- ☐ Silver
- ☒ Trail Blazer Sweatshirt
- ☐ Tuxedo T-Shirt

Logon = [Joel Kristenson](#)

There're many related resources below that talk about other event and sale order related topics, 3rd party tools to help make your life easier, but as always please give us a call if you need some assistance.



Trail Blazer™

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

#5 Related Resources

Article: [Events 2014 Part I](#)

Article: [Purchase Orders](#)

Article: [Add a Background Image to an Event](#)

Article: [Display your Logo as a Redirect Link for an Event](#)

Article: [Events 2013 | Coupon promo code error messages](#)

Video: [Events 2013](#)

Article: [Events 2013](#)

Article: [Web site signup < iFrame >](#)

Article: [Configure Website](#)

Article: [Setting the Time Zone in your Trail Blazer Database](#)

Article: [Email Notification of Web Occurrences](#)

3rd Party Resource: [Notepad++](#)

3rd Party Resource: [HTML Tidy](#)

Live Event Demo 1: https://trailblz.info/demononprofit_joel/EventComplete.aspx?eventid=20

Live Event Demo 2: <https://trailblz.info/demononprofitmark/EventComplete.aspx?eventid=20>

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 Trail Blazer's intro training class before calling or emailing tech support. [Click Here](#) to view our calendar for upcoming classes and events. After signing up you will receive instructions for how to log into the interactive online webinar.

**This service is included in your contract.*