Tracking Grants in Trail Blazer – Requested, Denied, Approved, And How to Build a Pivot Summary Report for Totals

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Last Updated: 2015-09-04

Overview

This article is primarily for our **nonprofit** customers, but does contain useful information related to log notes and pivot reports for political customers who are interested in the same. It covers the basic ways you can track **grants** by utilizing **Log Note Types**, **Reminders**, and the **System Gallery** to stay organized. It also gets into details on how to build a basic **Pivot** report you can run to get sum totals on how your different grant requests are coming along.

IMPORTANT! Some sections of this article require you have appropriate security clearance to things like the **System Manger**.

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

Outline

#1 Adding the Log Types for Grant Requested, Grant Denied, and Grant Approved

#2 Recording the Log Notes in a Foundation's Record Card, and Storing the Related Documentation in the Gallery

#3 Generating Reports from the Search Log Entries List, and Building a Pivot Summary Report for Totals of Grants Requested, Approved, and Denied

#4 Related Resources

#1 Adding the Log Types for Grant Requested, Grant Denied, and Grants Approved

Navigate to the Log Types list under **Application Menu** > **System Manager** > **Lists** > **Log Types** and click **[Search]**.

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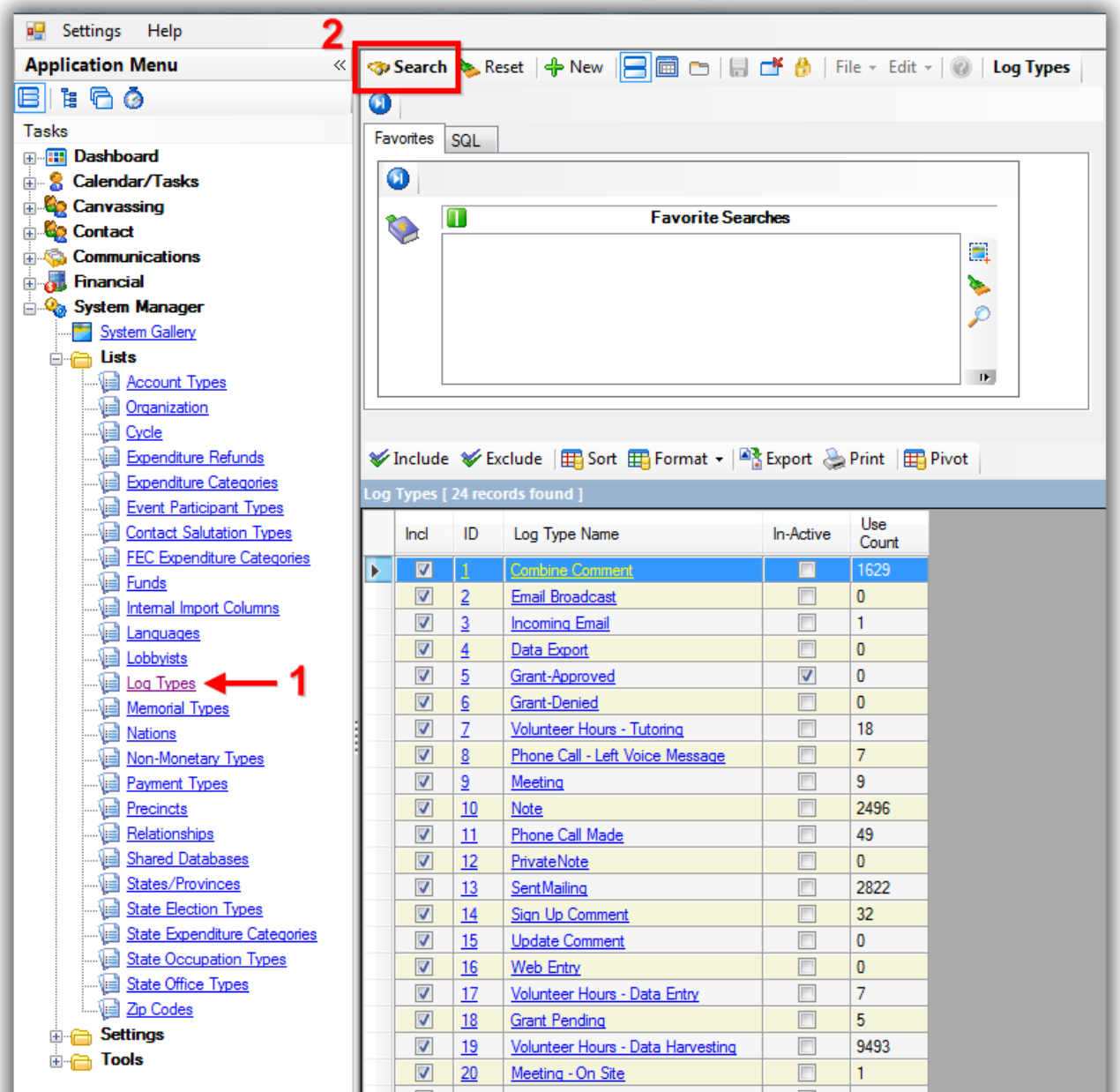
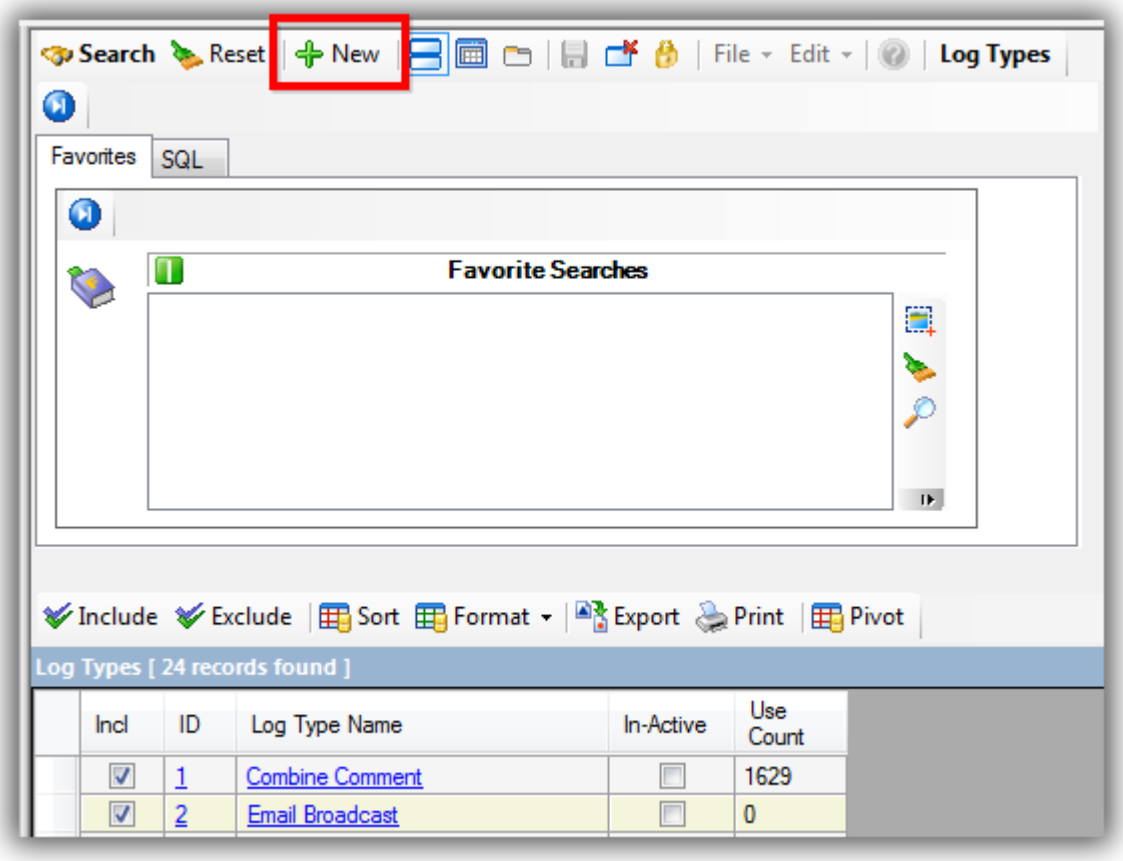
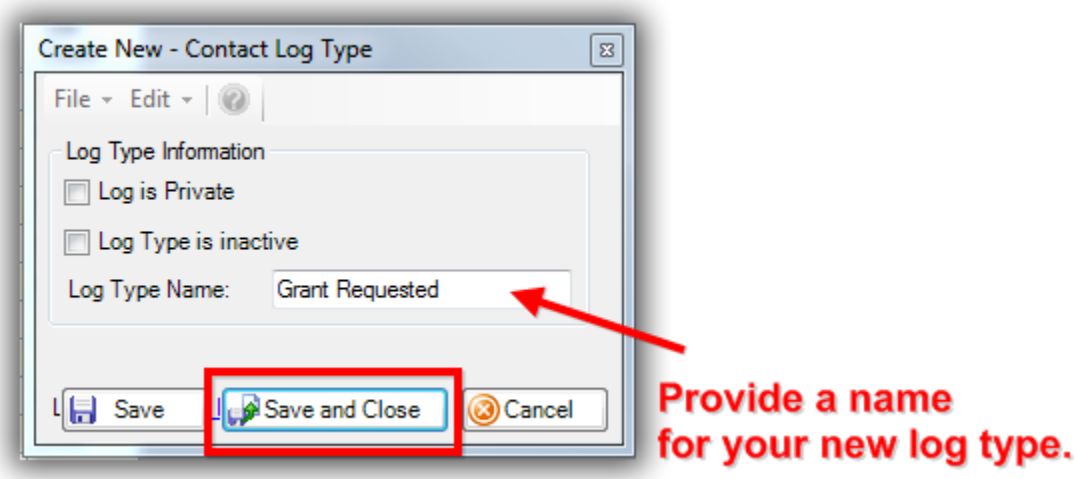
How to find the current list of Log Types in your database.



Click **[+ New]** on the search tool strip to begin adding a new log type.



Create a Log Type Name to categorize your grant status, and then click **[Save and Close]**.



In my example I created 3 different log types called ***Grant Requested****,* ***Grant Denied****, and* ***Grant Approved****.*

Once you're done adding your log types click **[Search]** to refresh the list and they'll display at the bottom:

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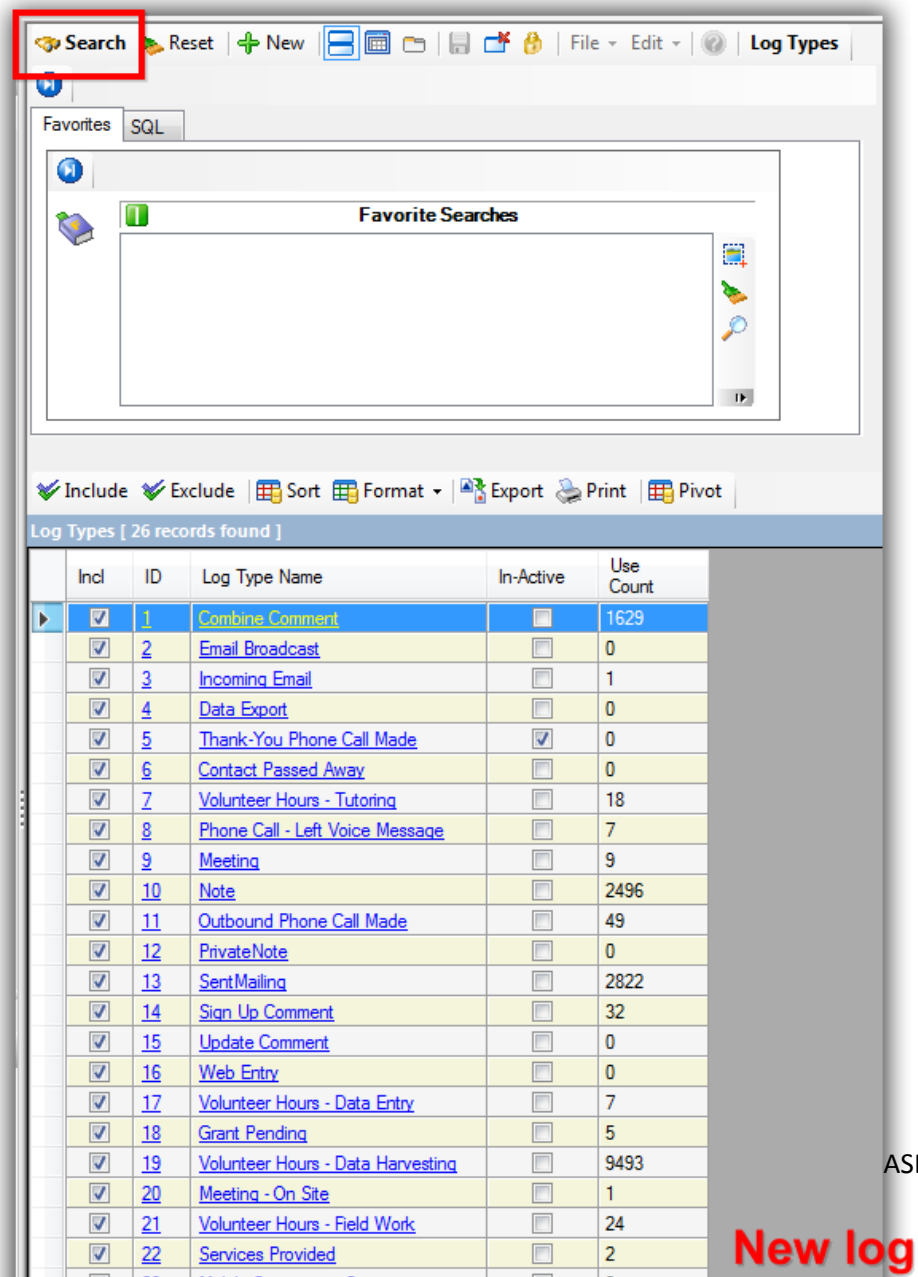

Incl	ID	Log Type Name	In-Active	Use Count
☑	1	Combine Comment	☐	1629
☑	2	Email Broadcast	☐	0
☑	3	Incoming Email	☐	1
☑	4	Data Export	☐	0
☑	5	Thank-You Phone Call Made	☑	0
☑	6	Contact Passed Away	☐	0
☑	7	Volunteer Hours - Tutoring	☐	18
☑	8	Phone Call - Left Voice Message	☐	7
☑	9	Meeting	☐	9
☑	10	Note	☐	2496
☑	11	Outbound Phone Call Made	☐	49
☑	12	PrivateNote	☐	0
☑	13	SentMailing	☐	2822
☑	14	Sign Up Comment	☐	32
☑	15	Update Comment	☐	0
☑	16	Web Entry	☐	0
☑	17	Volunteer Hours - Data Entry	☐	7
☑	18	Grant Pending	☐	5
☑	19	Volunteer Hours - Data Harvesting	☐	9493
☑	20	Meeting - On Site	☐	1
☑	21	Volunteer Hours - Field Work	☐	24
☑	22	Services Provided	☐	2

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New log types for

Next you'll want to refresh the **drop-downs** in your database so they display your new log types. To execute this utility follow **Application Menu** > **System Manager** > **Settings** > **Update Unique Search Values (Drop Downs)**

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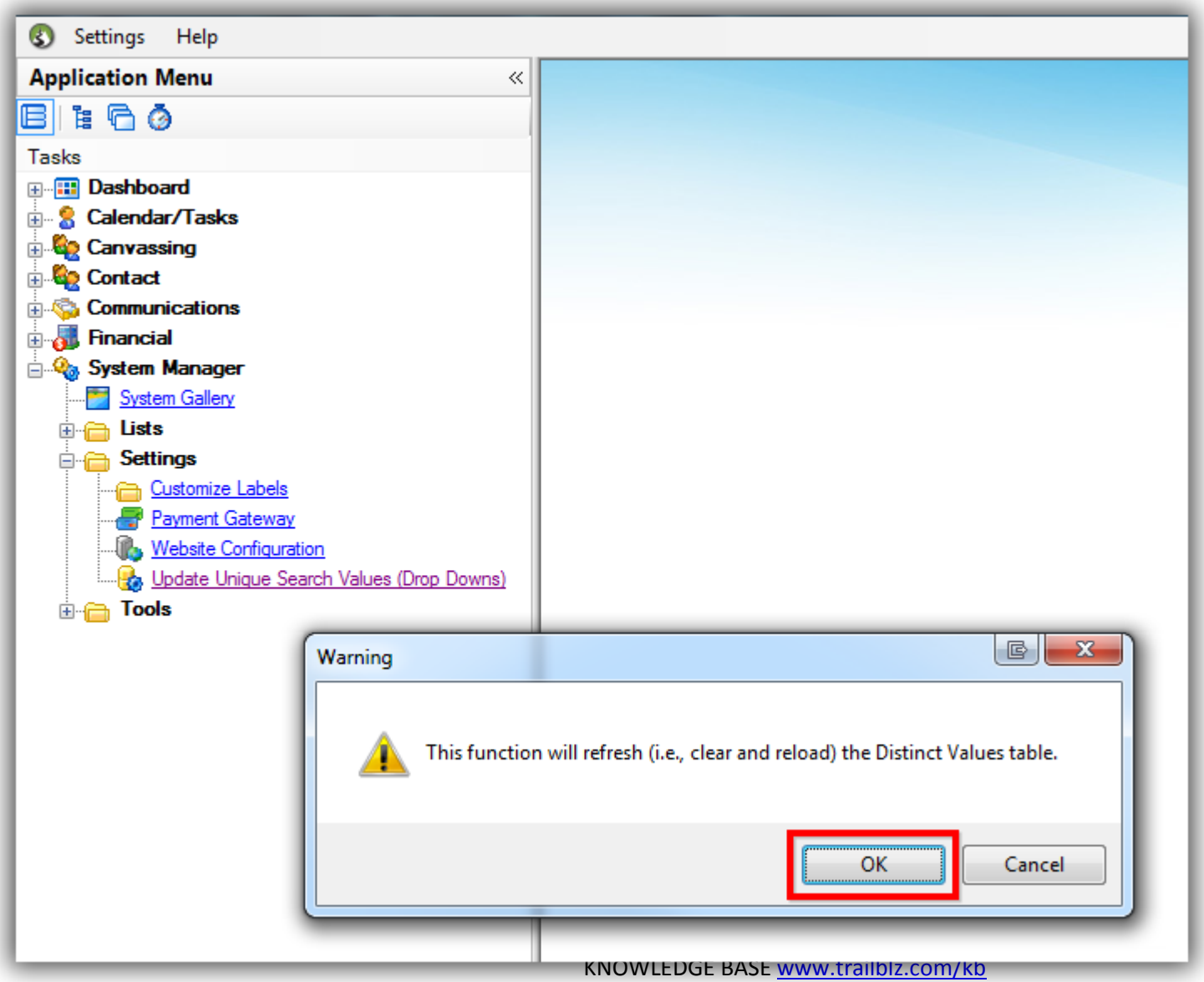

You're now finished with these steps. The next section will show you how to record a grant request in a foundation's record card, and how to store the related documentation in the Gallery.

Tip: Once a new Log Type has been created you're not able to delete it so if it hasn't been used you can always just rename it by opening the Log Type record(s) in your Log Types list under **System Manger > Lists**.

#2 Recording the Log Notes in a Foundation's Record Card, and Storing the Related Documentation in the Gallery

From your Contacts (*Donors/Voters*) list search for the foundation you're requesting a grant from, and click on the blue First Name hyperlink to open their record. *In this example I pulled up all of my foundation records and selected the **Rockefeller Foundation**.*

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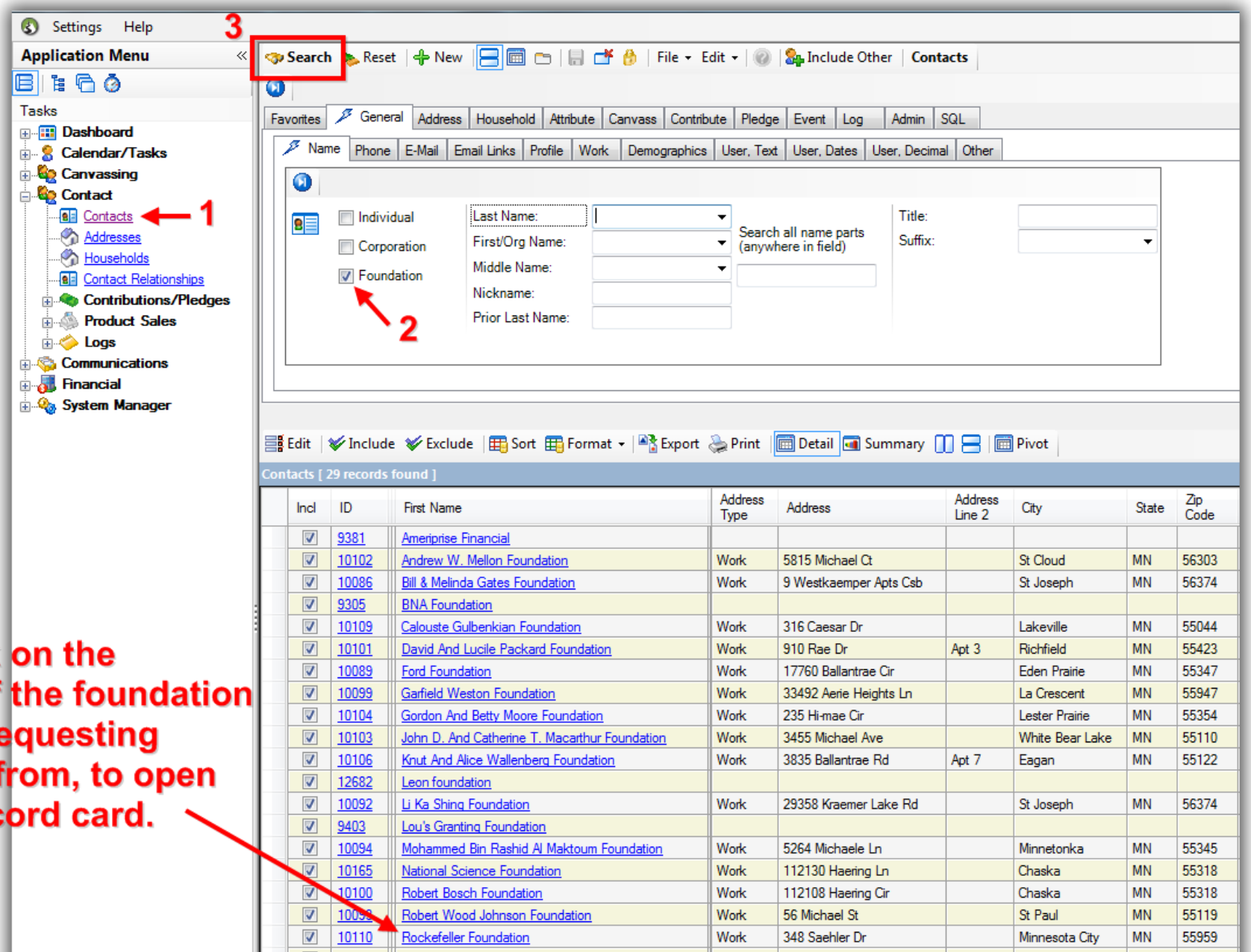

4 - Click on the name of the foundation you're requesting a grant from, to open their record card.

Navigate to the **Logs** tab, and click the **[+ New]** button.

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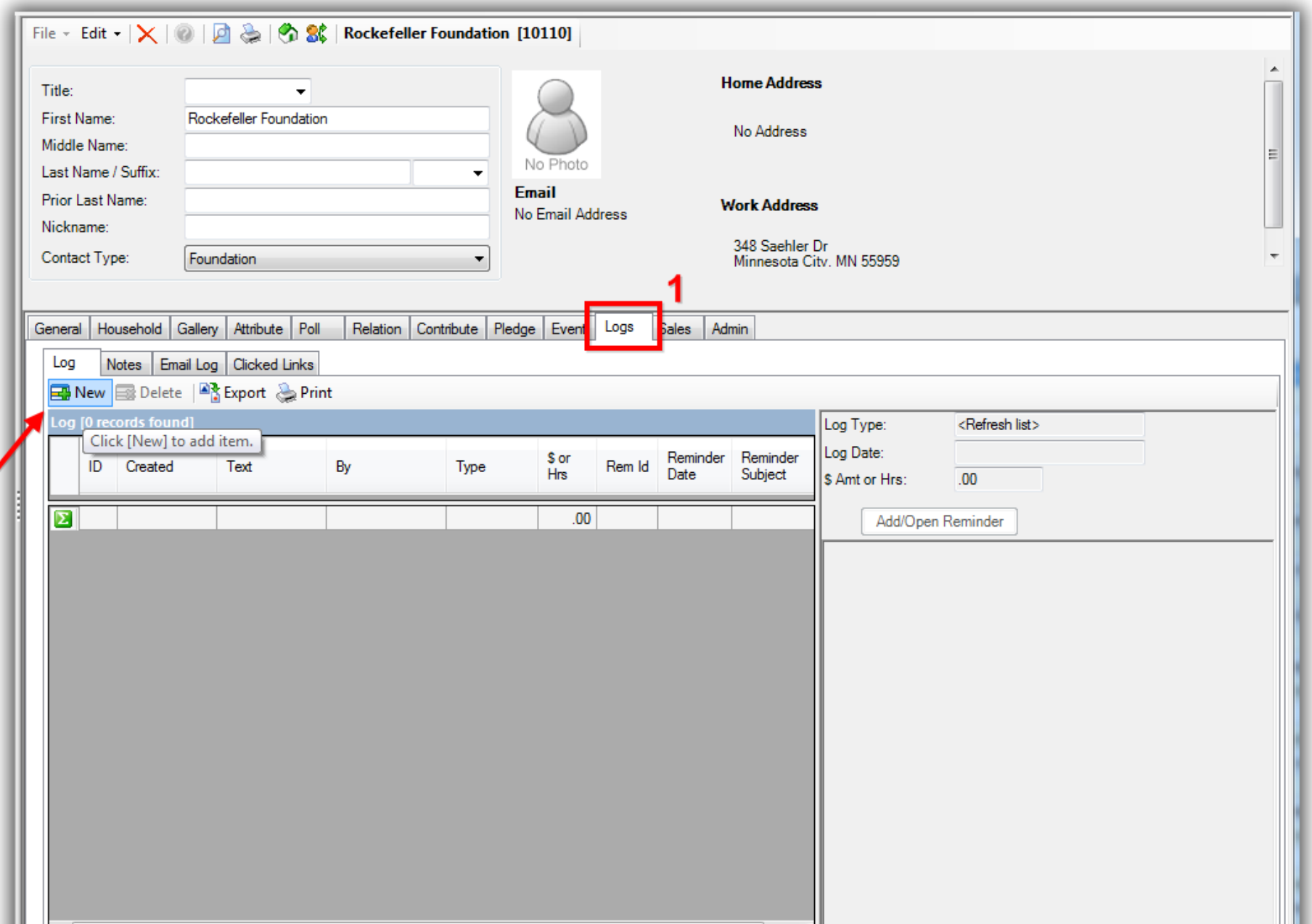

Click the **Log Type** drop-down and select your new log type of **Grant Requested**.

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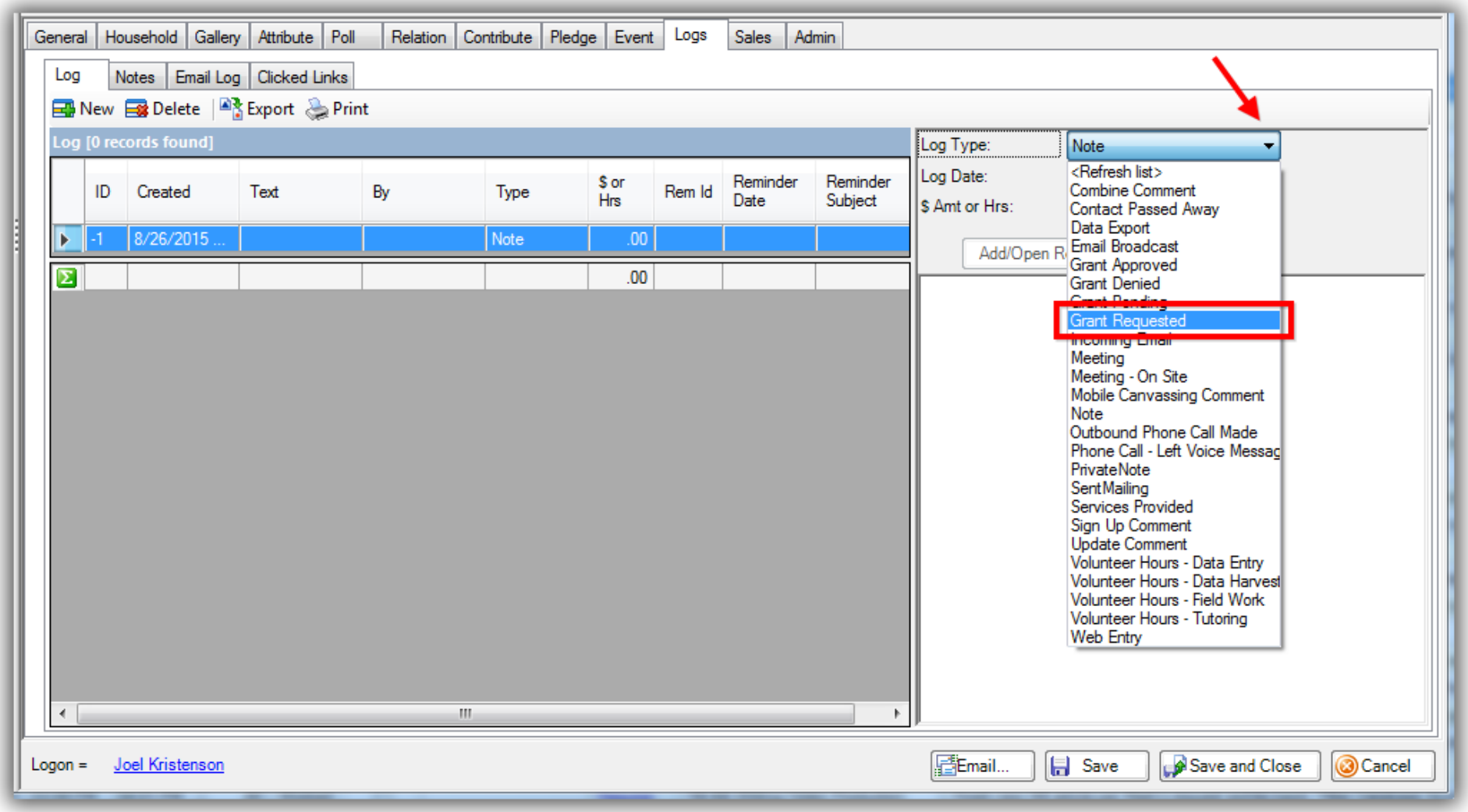

Tip: If your new log types don't display even after running the 'refresh unique drop-downs' utility, then click the '**Refresh list**' option, shown in the image below.

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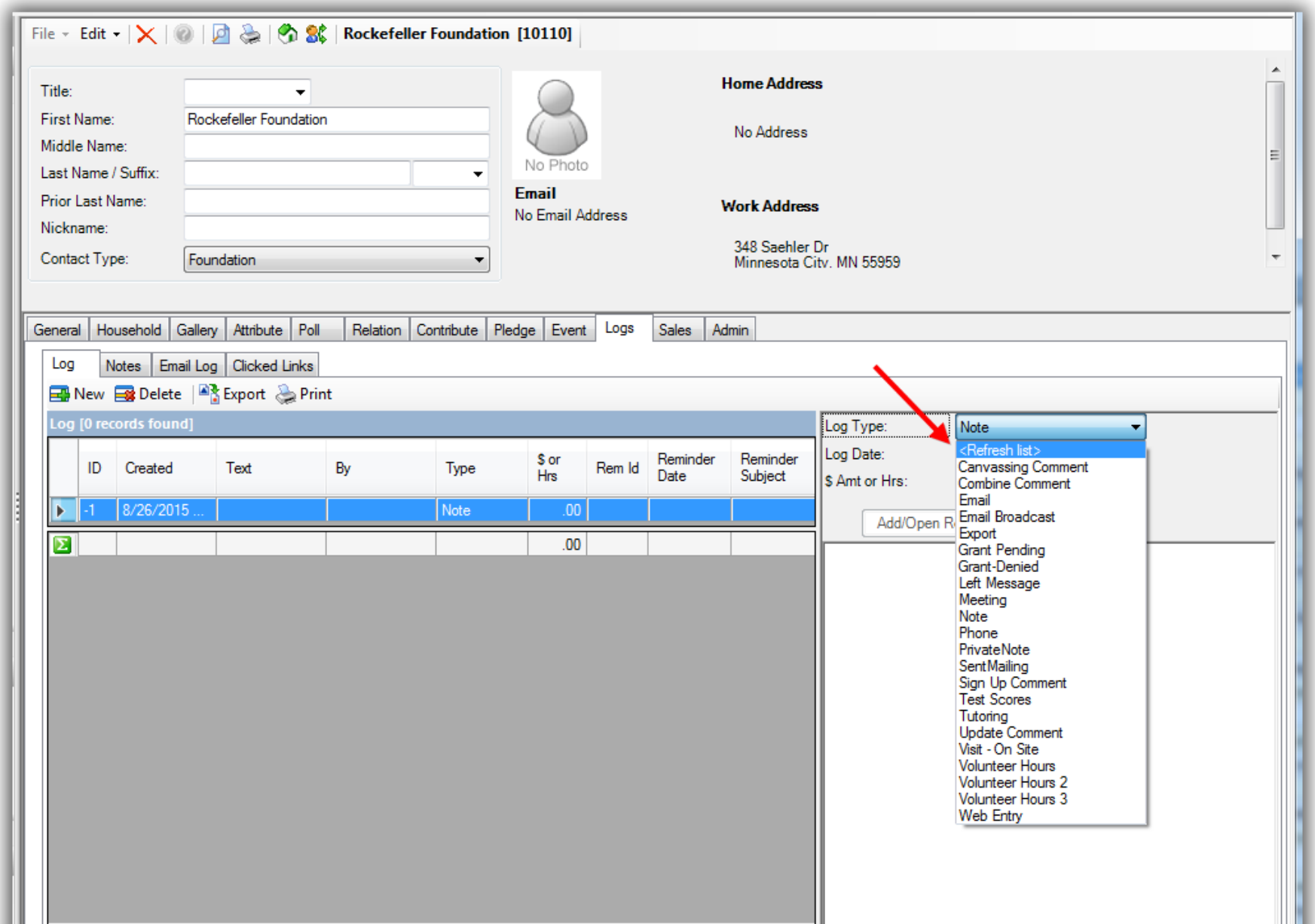
If your new Log Type drop-down options don't display click on 'Refresh list'.



Fill out the relevant information on the input form i.e. Date/Amount/Details, and click **[Save]**. *In my example below I requested **$5,000** on **8/21/2015** with notes on where to find related info in the **Gallery**.*

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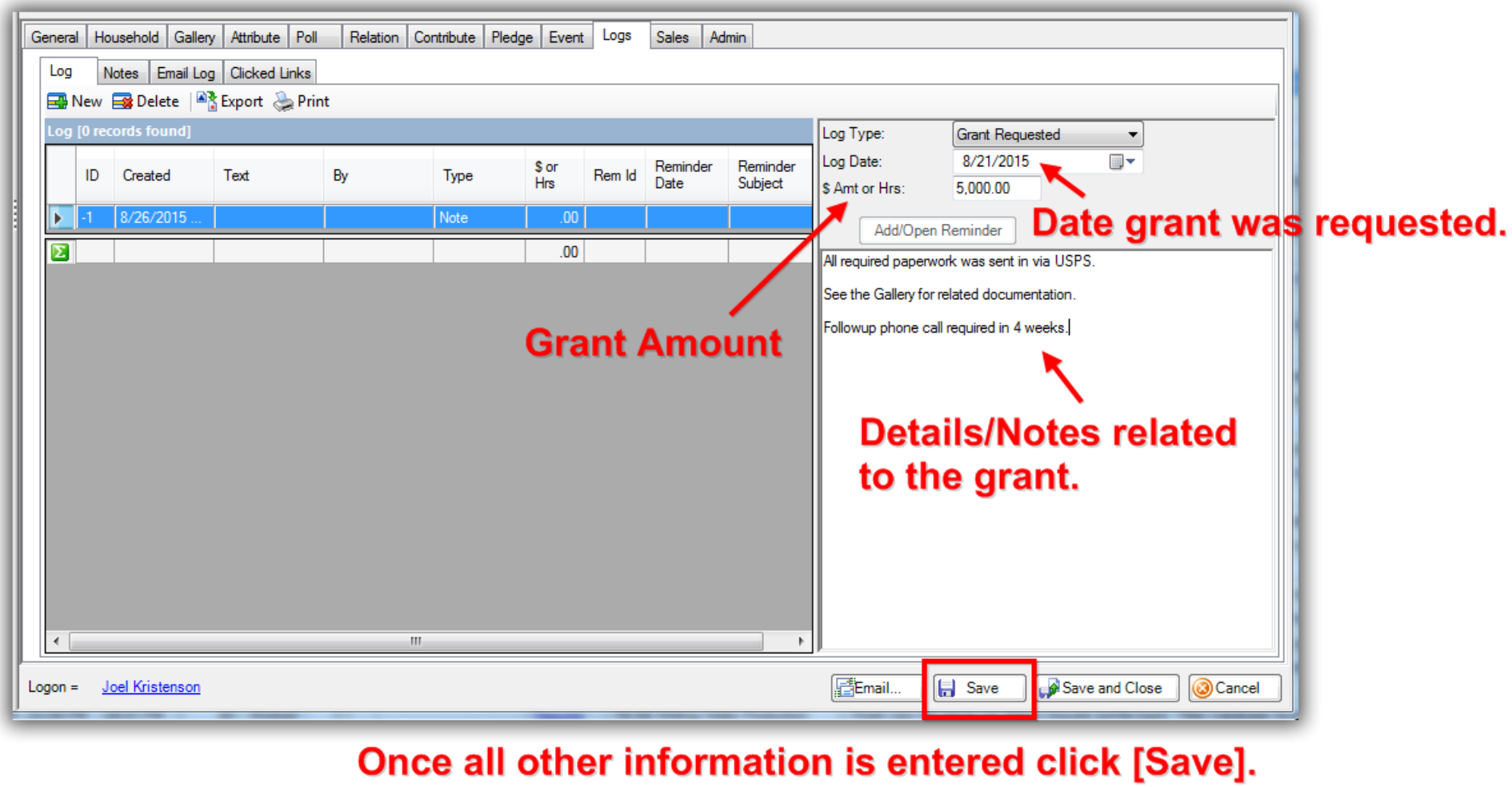

My example saved log note is below, the details you entered will now display so each of your database users can quickly see what's been communicated with this contact if they open the record at some future point.

Next you'll want to click on **[Add/Open Reminder]** if you need to follow up on this grant at a future point.

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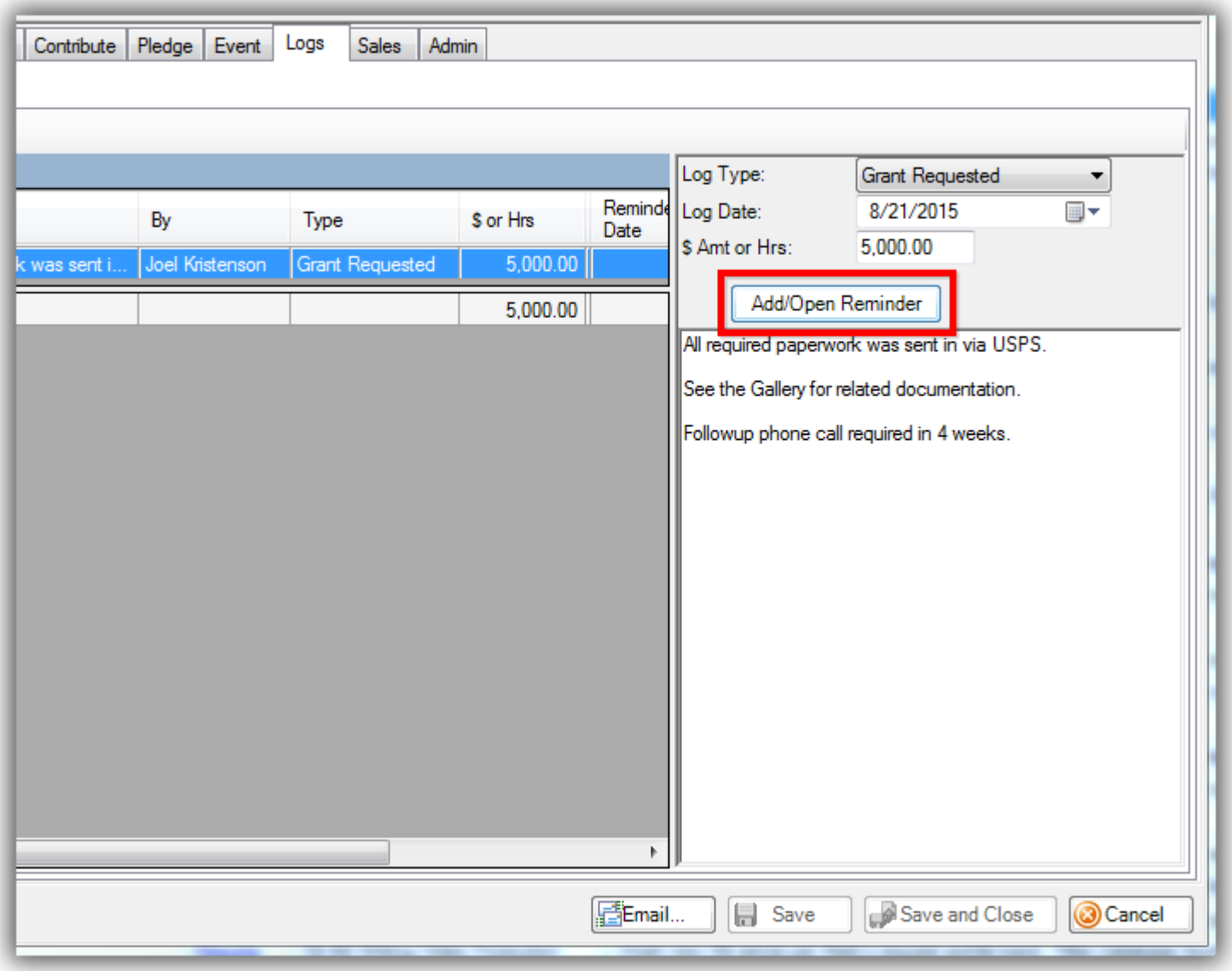

Fill out all of the relevant follow-up reminder information, and click **[Save]**. *If no follow-up is required you can skip this step. My example is below to follow-up in 4 weeks after the date the grant was requested.*

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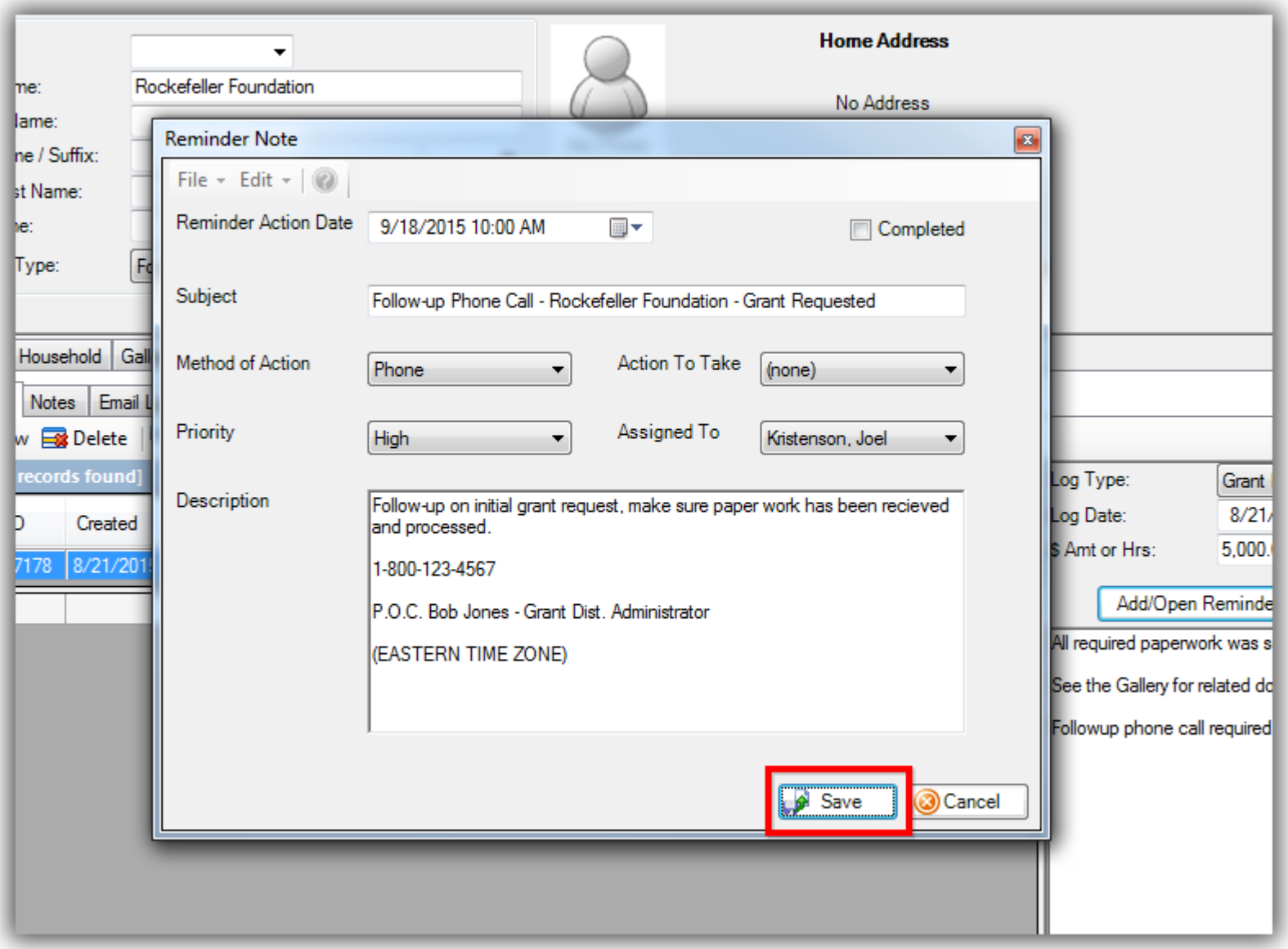
Example follow-up reminder record.



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Reminders will display in the lower-left of the **Trail Blazer** interface, they will turn red if they're passed due. *My example is below.*

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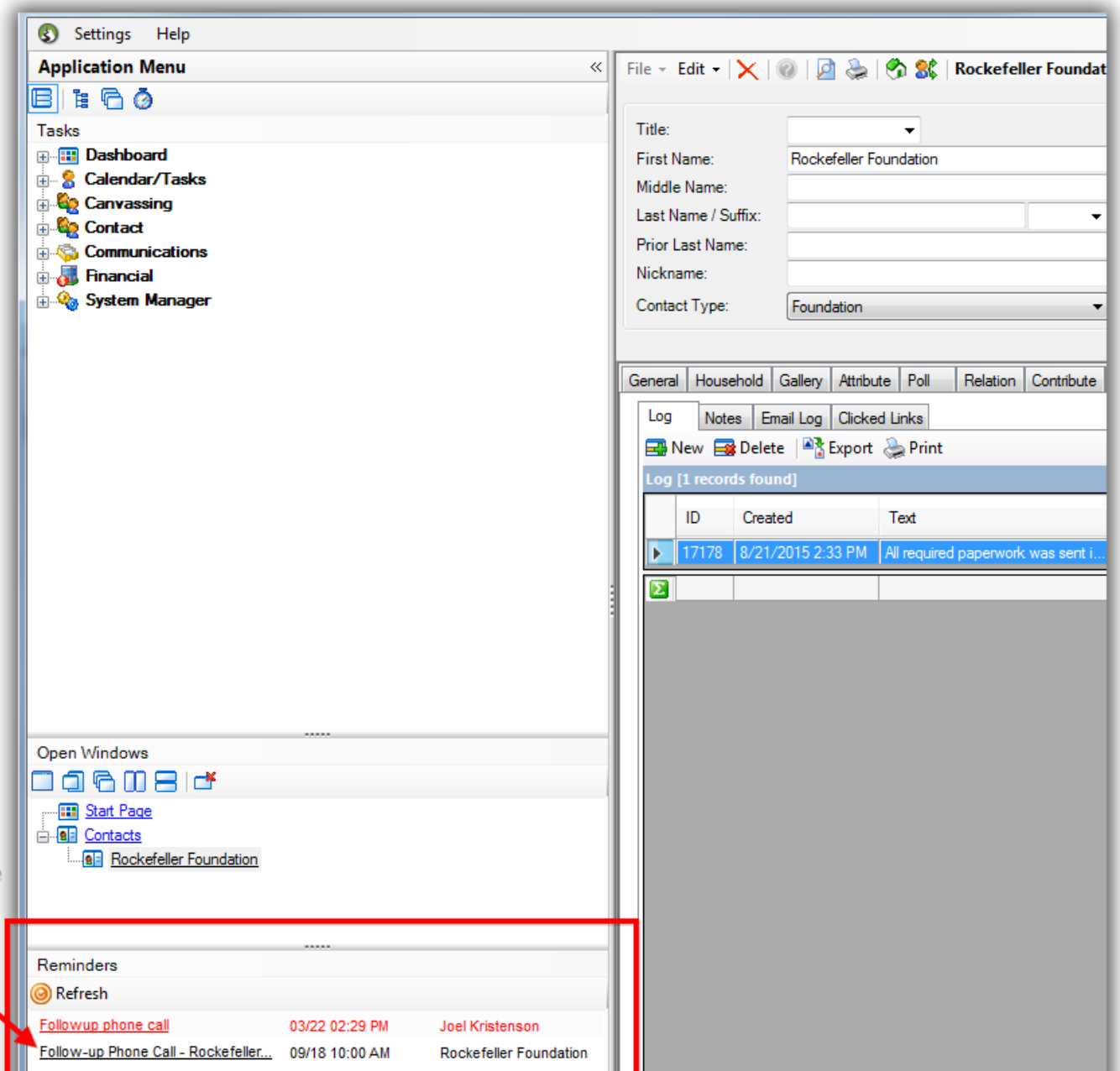

If you schedule a reminder it will show in the lower-left of the Trail Blazer interface.

You may need to click 'refresh' if you don't see it right away. If it's past due it will turn red.

You're now finished with the recording of the grant request log note, navigate to the **Gallery** tab if you would like to store **related grant documents**. I*f you don't have any you can skip this step.*

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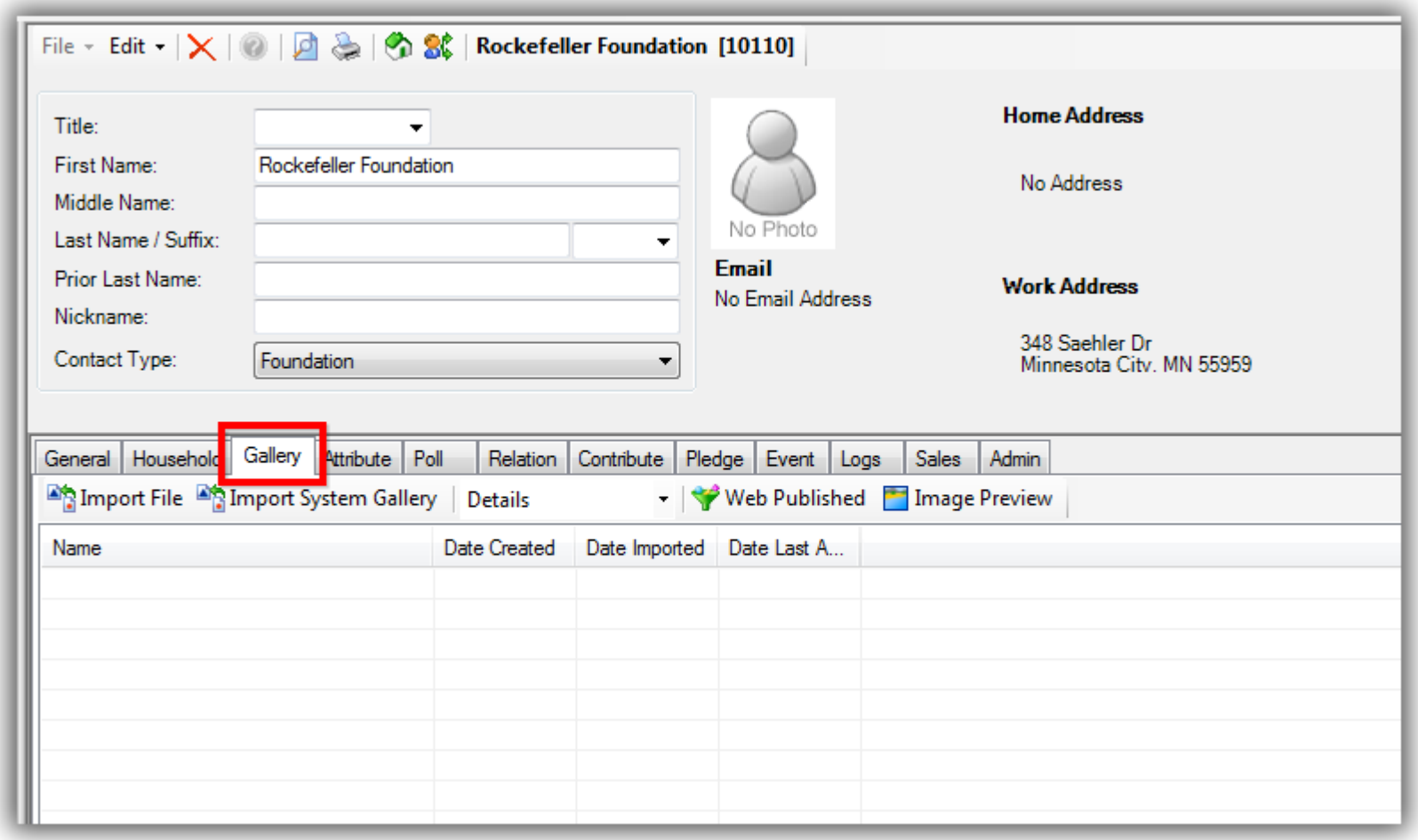

Click on the **[Import File]** button.

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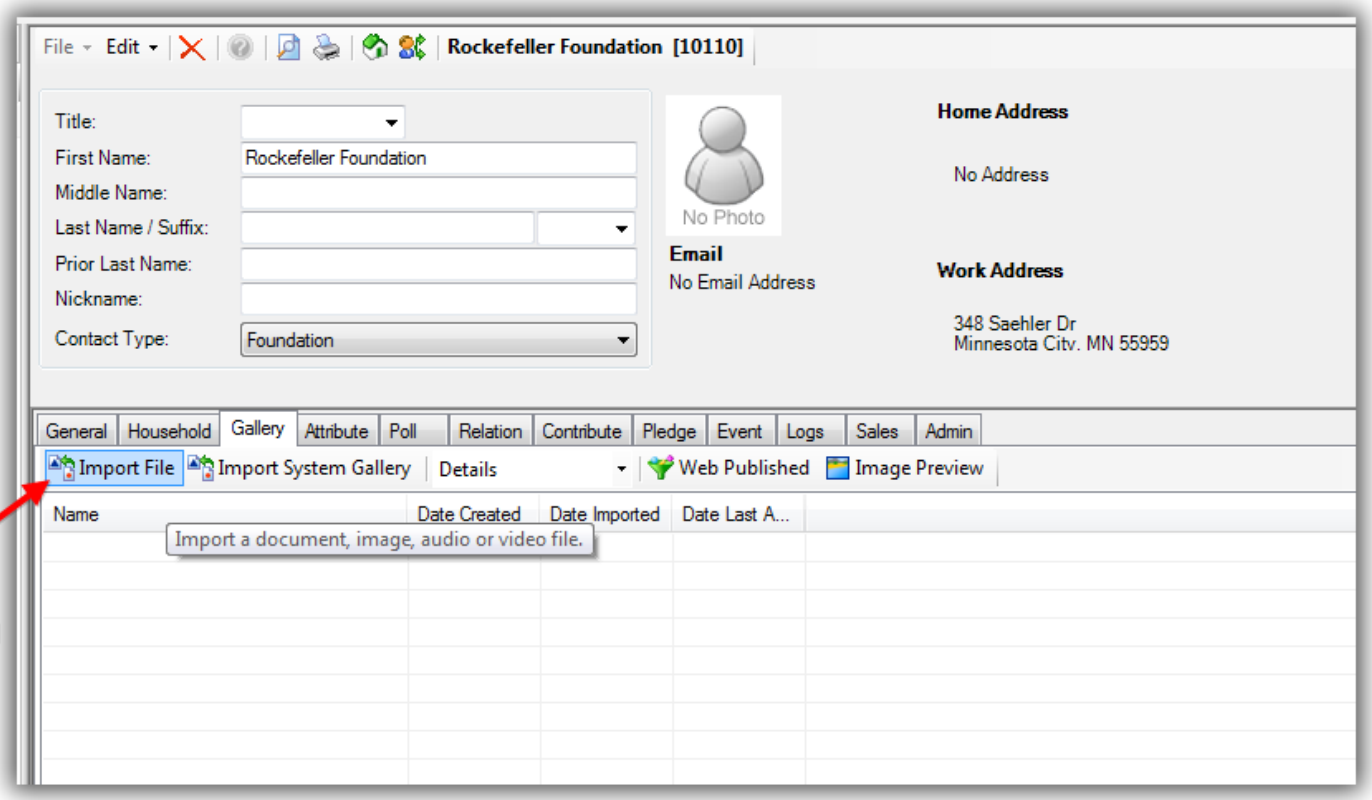

Click here to import your grant related documentation i.e. Word Docs, Excel Spreadsheets, PDF's, etc.

Locate the file(s) you would like to upload, click on it, and then click **[Open]**.

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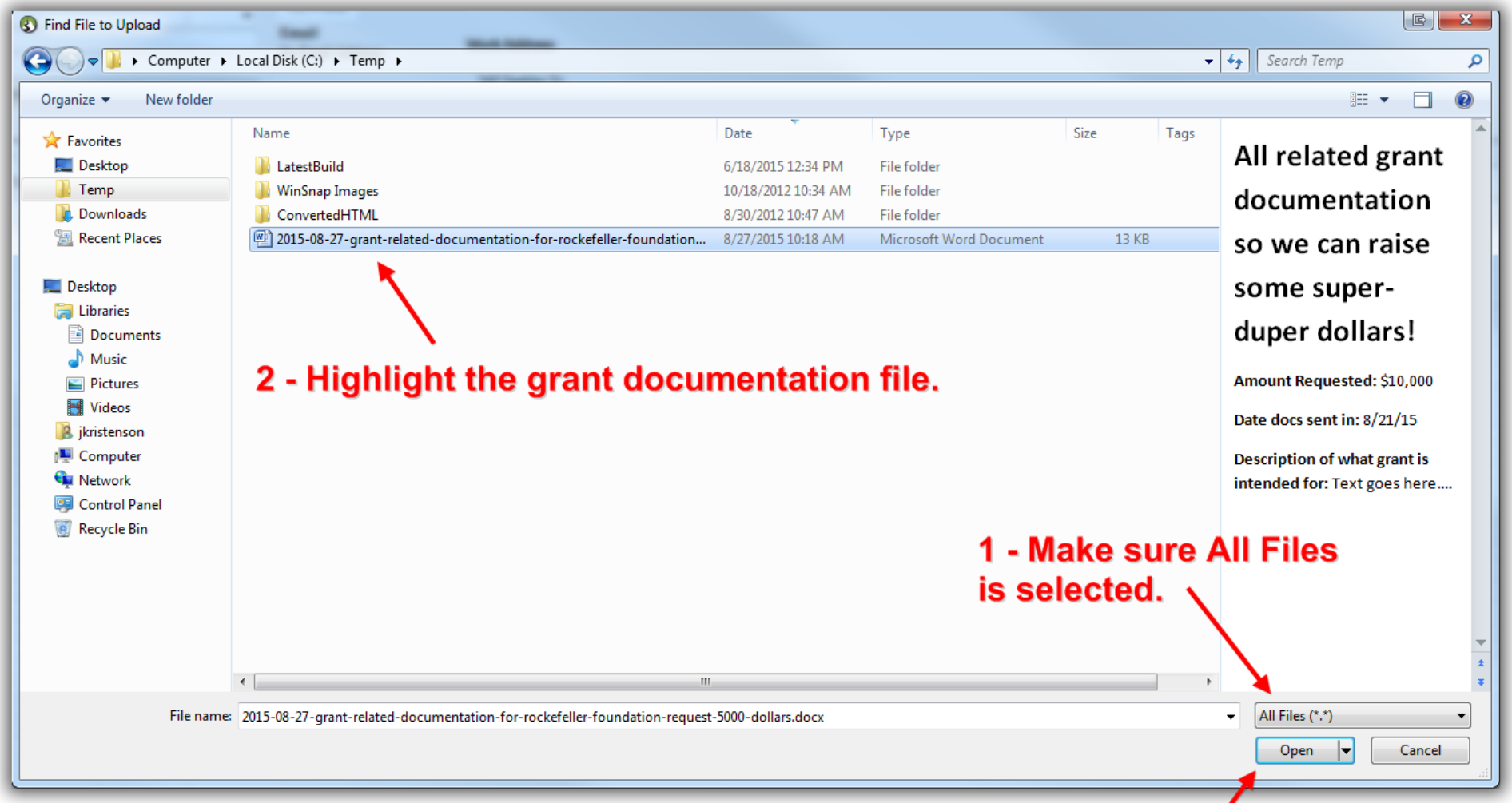
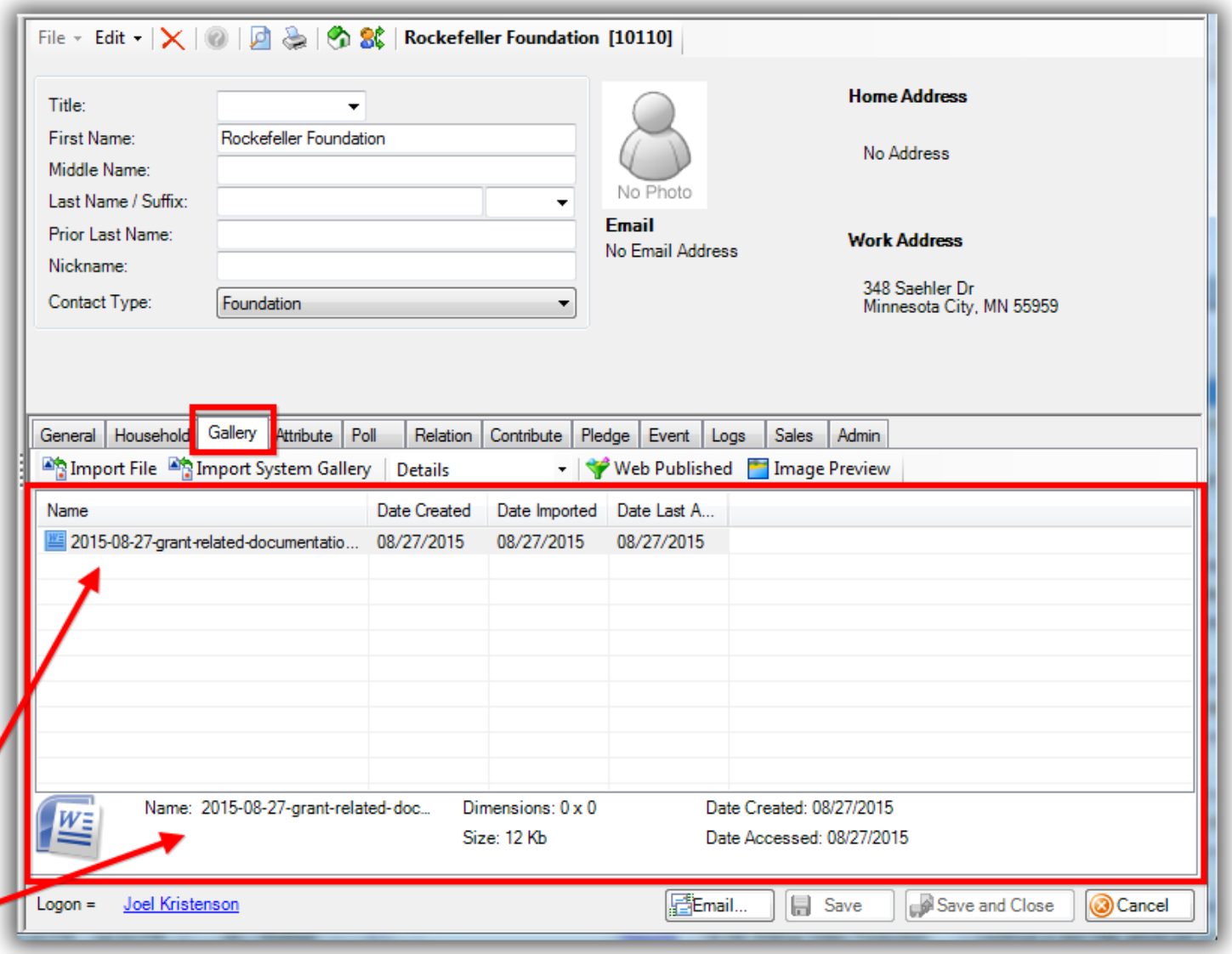


Once the file(s) is uploaded it will display with details in the **Gallery**. It can be viewed by other users with appropriate security access and can be exported if need be. *My example Word Document is below.*

Tracking Grants in Trail Blazer – Requested, Denied, Approved, And How to Build a Pivot Summary Report for Totals



Details related to the stored document.

You're now finished with these steps.

The final section in this article talks about how to generate **basic reports** off of the log note data you've record as well as how to build a more advanced **Pivot table** which will **summarize** the current dollar amounts for each of the grants you're tracking.

#3 Generating Reports from the Search Log Entries List, and Building a Pivot Summary Report for Totals of Grants Requested, Approved, and Denied

For this section we'll start with some very basic queries, and finish with a more advanced summary report using the Pivot utility.

To search by a single **Log Type** e.g. '**Grant Requested'**, navigate to the **Search Log Entries** list under the **Application Menu**, choose '**Grant Requested**' under the **Log Type** drop-down, and then click **[Search]**.

In my example I had 3 requested grant records for a total of $18,500.00.

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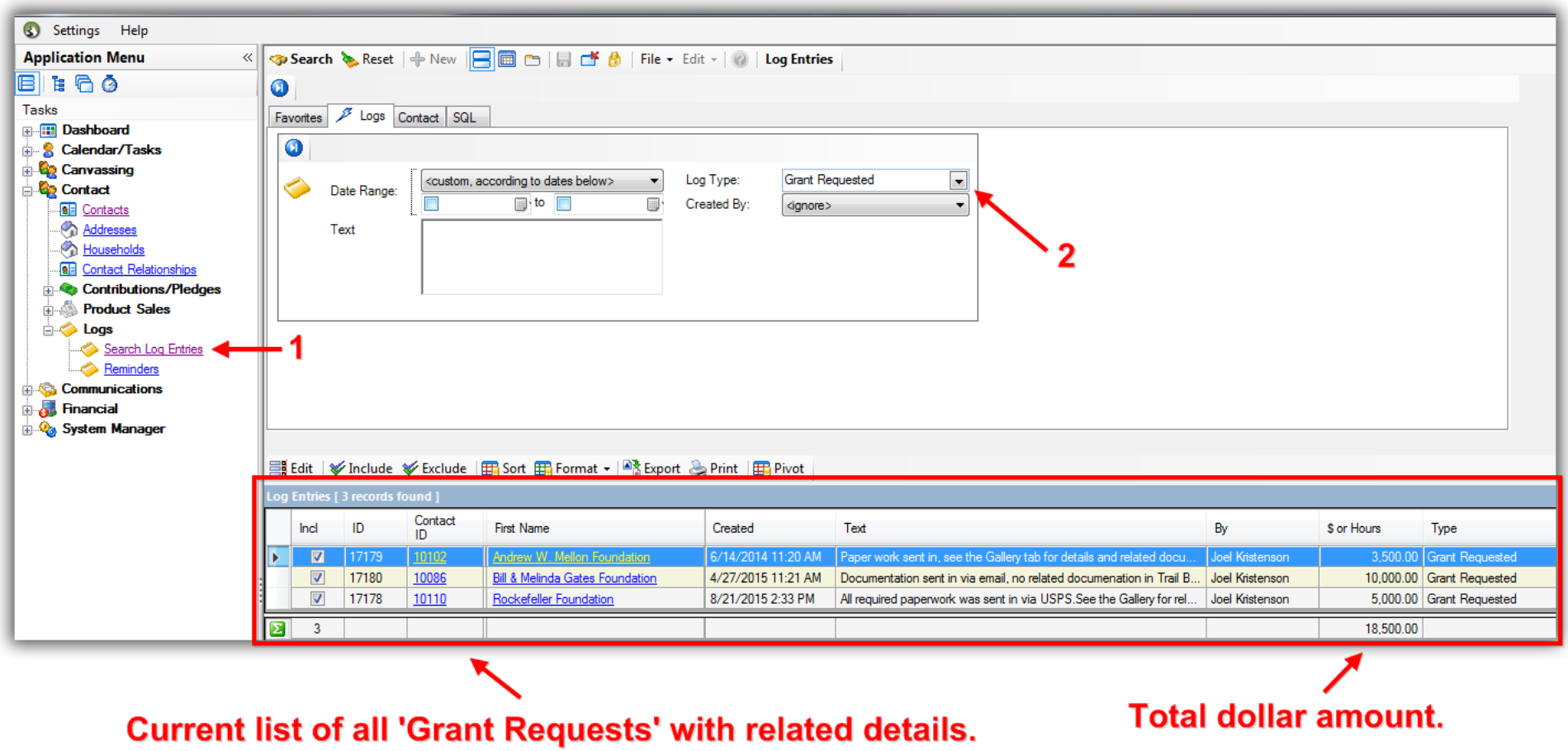
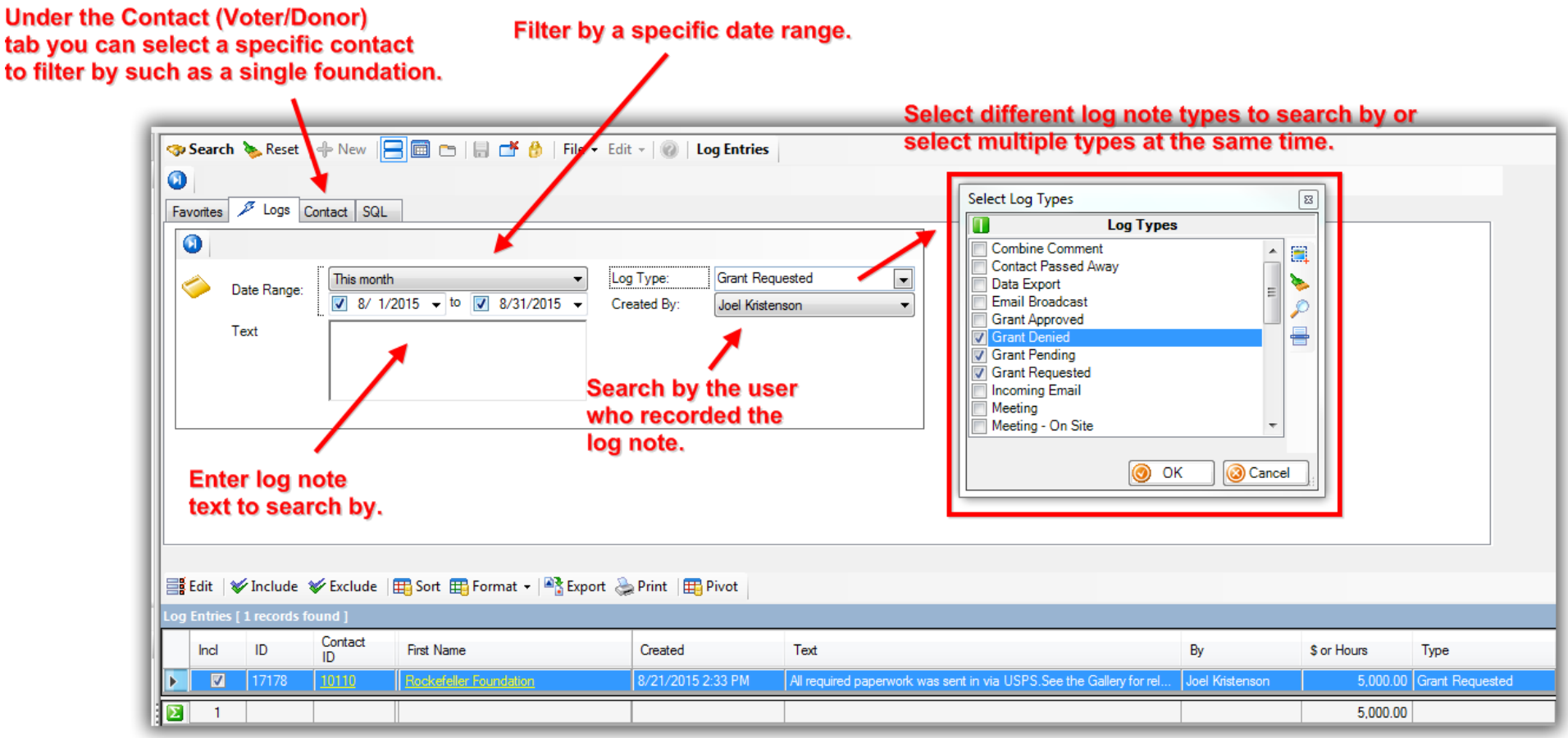


The other search criteria you can use in this list for basic queries includes:

- Date Range
- Created By
- Other Log Types

- A Specific Contact (Foundation)
- Specific Text within a Log Note

This screenshot provides a visual of the other searchable fields in the **Log Entries** List with descriptions:



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To finish off this article we'll end by constructing a **pivot summary report** of all the different **Grant Log Types** to see how many grant requests have occurred per foundation, as well as the total dollar amounts for all requested, accepted and denied grants.

Begin by opening a new **Search Log Entries** list, and select the **Log Types** of **Grant Requested**, **Grant Approved**, and **Grant Denied**, then click **[Search]**. *In my example it produced 10 log entries related to my grant tracking.*

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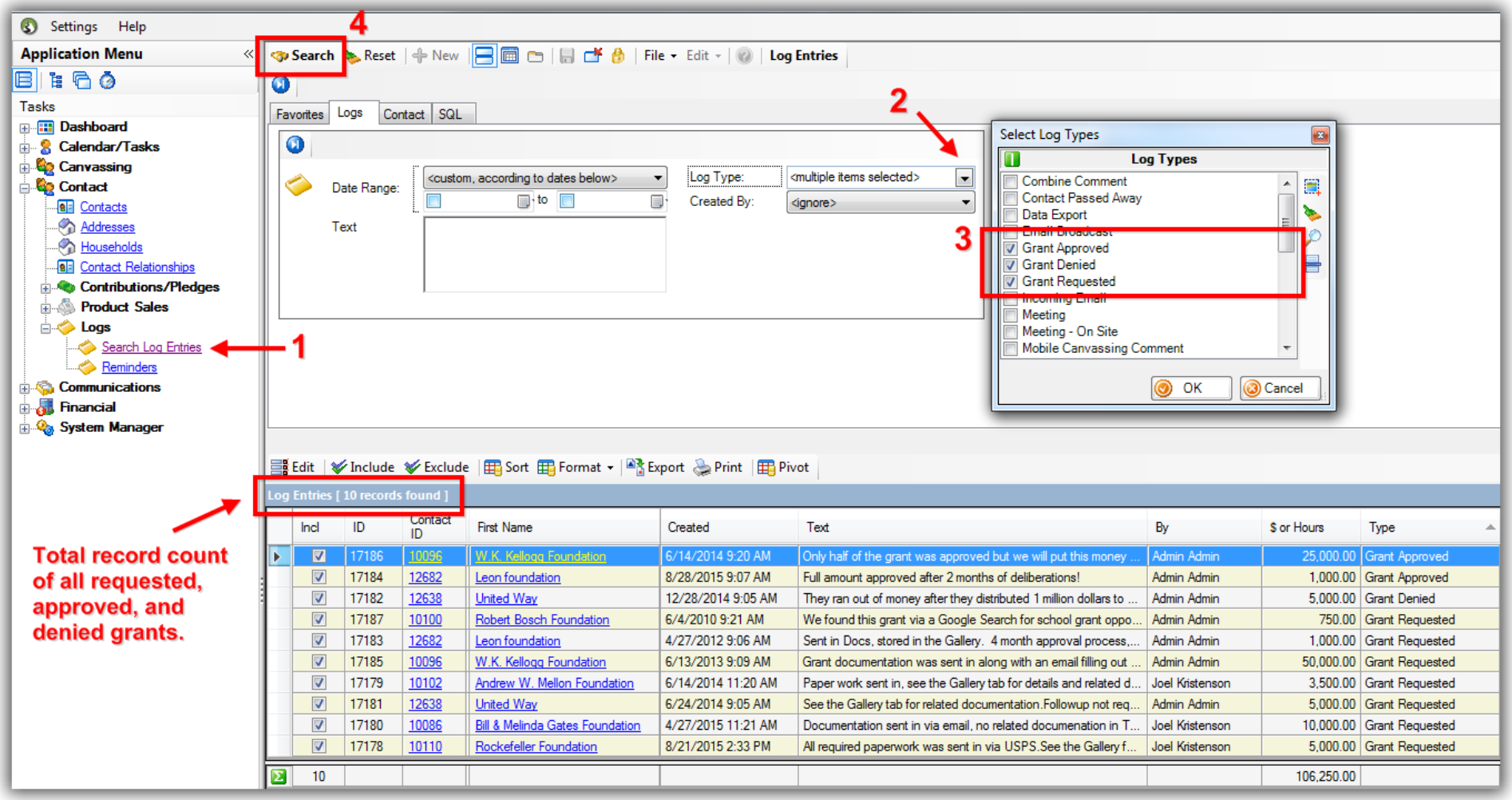

Incl	ID	Contact ID	First Name	Created	Text	By	$ or Hours	Type
☑	17186	10096	W.K. Kellogg Foundation	6/14/2014 9:20 AM	Only half of the grant was approved but we will put this money ...	Admin Admin	25,000.00	Grant Approved
☑	17184	12682	Leon foundation	8/28/2015 9:07 AM	Full amount approved after 2 months of deliberations!	Admin Admin	1,000.00	Grant Approved
☑	17182	12638	United Way	12/28/2014 9:05 AM	They ran out of money after they distributed 1 million dollars to ...	Admin Admin	5,000.00	Grant Denied
☑	17187	10100	Robert Bosch Foundation	6/4/2010 9:21 AM	We found this grant via a Google Search for school grant oppo...	Admin Admin	750.00	Grant Requested
☑	17183	12682	Leon foundation	4/27/2012 9:06 AM	Sent in Docs, stored in the Gallery. 4 month approval process,...	Admin Admin	1,000.00	Grant Requested
☑	17185	10096	W.K. Kellogg Foundation	6/13/2013 9:09 AM	Grant documentation was sent in along with an email filling out ...	Admin Admin	50,000.00	Grant Requested
☑	17179	10102	Andrew W. Mellon Foundation	6/14/2014 11:20 AM	Paper work sent in, see the Gallery tab for details and related d...	Joel Kristenson	3,500.00	Grant Requested
☑	17181	12638	United Way	6/24/2014 9:05 AM	See the Gallery tab for related documentation.Followup not req...	Admin Admin	5,000.00	Grant Requested
☑	17180	10086	Bill & Melinda Gates Foundation	4/27/2015 11:21 AM	Documentation sent in via email, no related documenation in T...	Joel Kristenson	10,000.00	Grant Requested
☑	17178	10110	Rockefeller Foundation	8/21/2015 2:33 PM	All required paperwork was sent in via USPS.See the Gallery f...	Joel Kristenson	5,000.00	Grant Requested
10							106,250.00	

Next, click on the **[Pivot]** button on the list tool strip.

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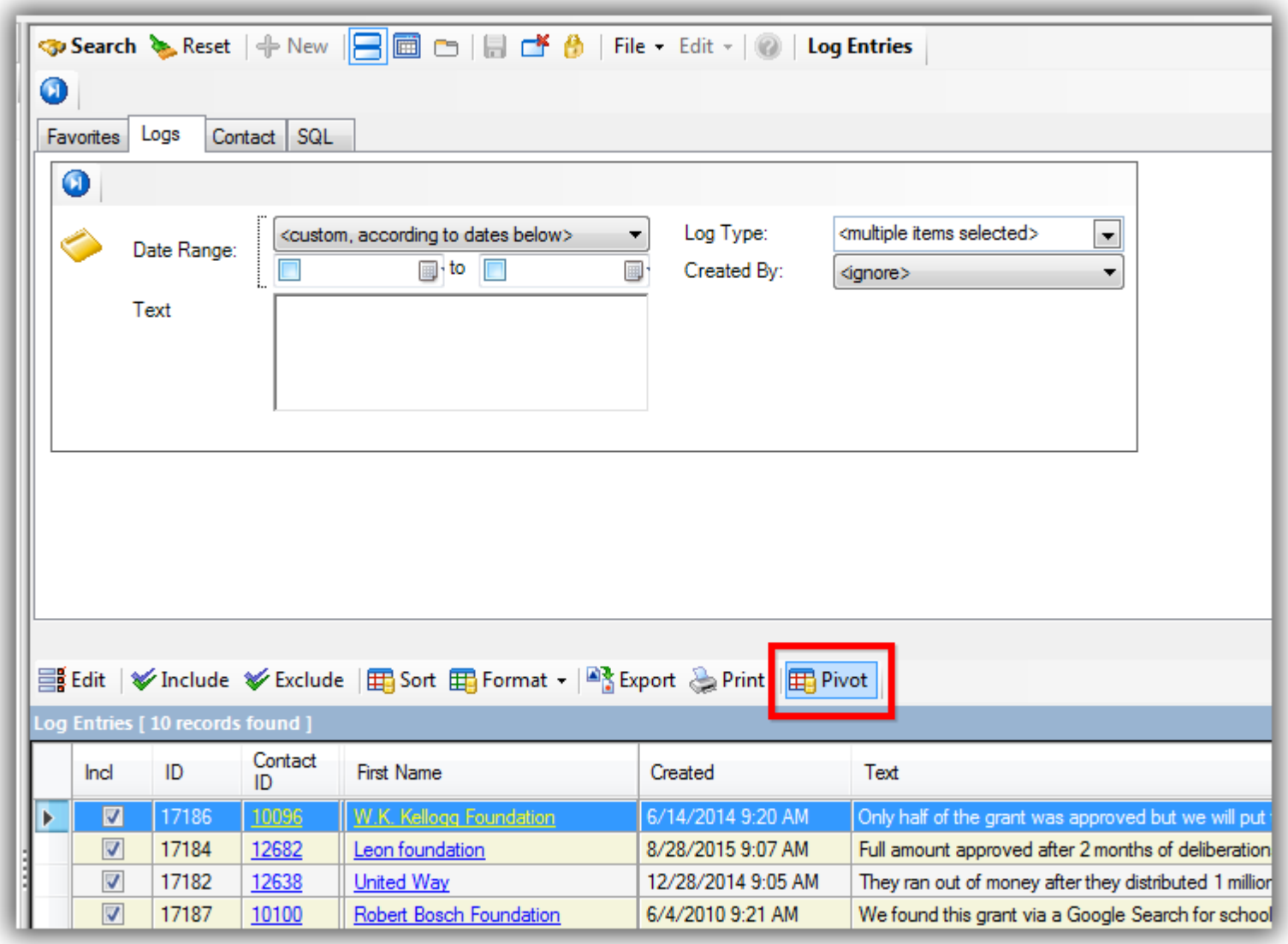
Tracking Grants in Trail Blazer – Requested, Denied, Approved, And How to Build a Pivot Summary Report for Totals



Under the **Row Labels** tab select **First Name**.

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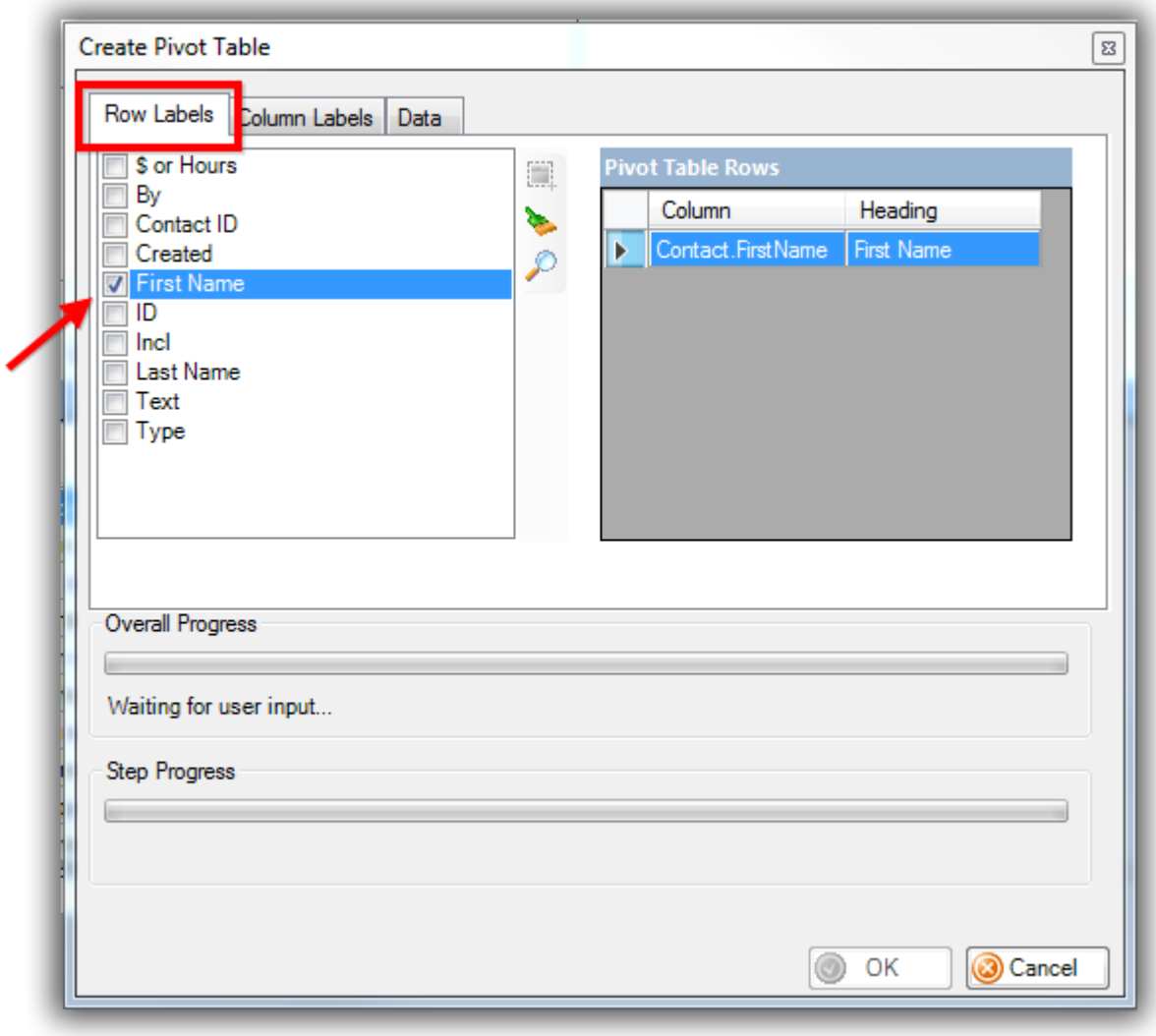
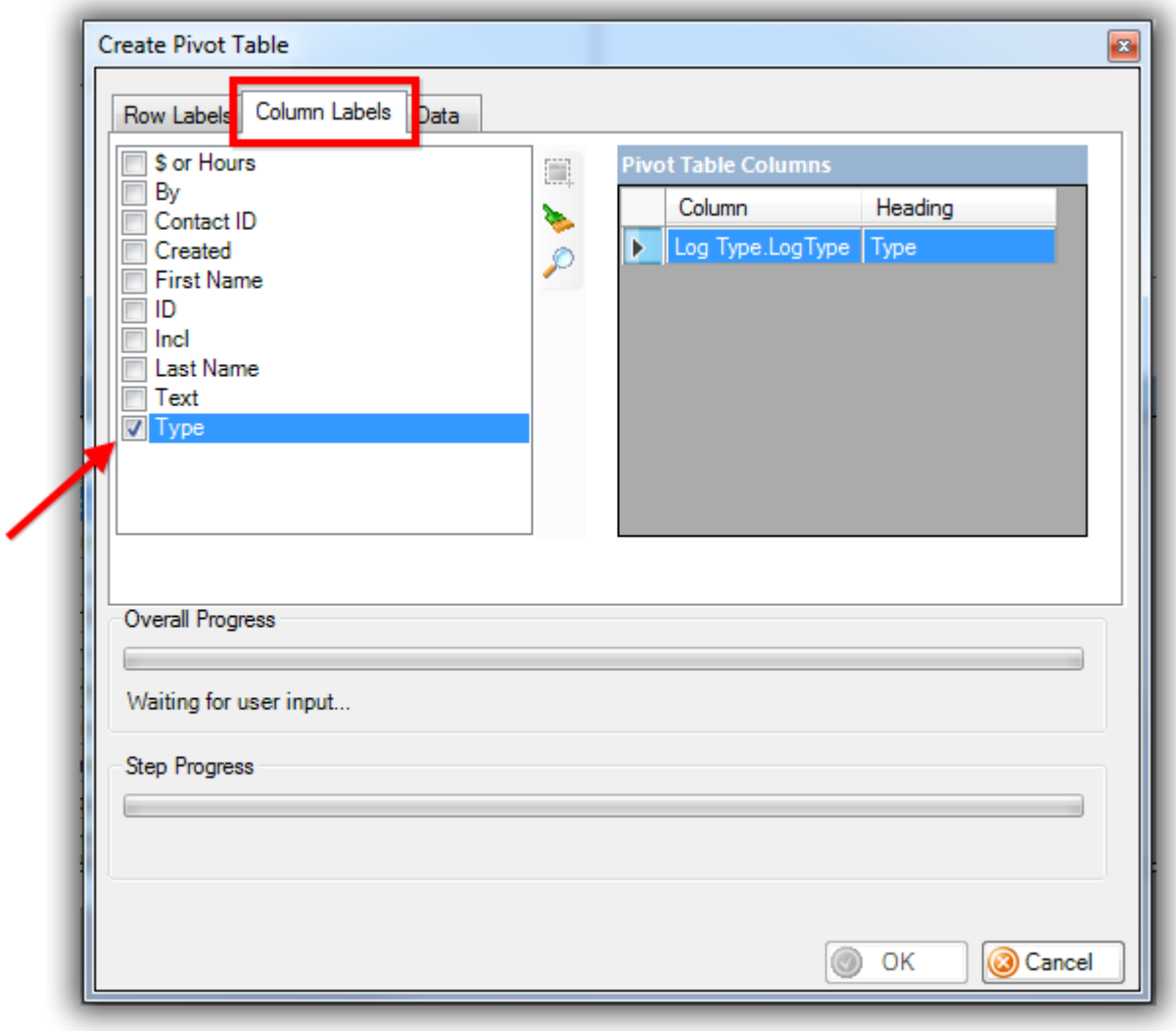


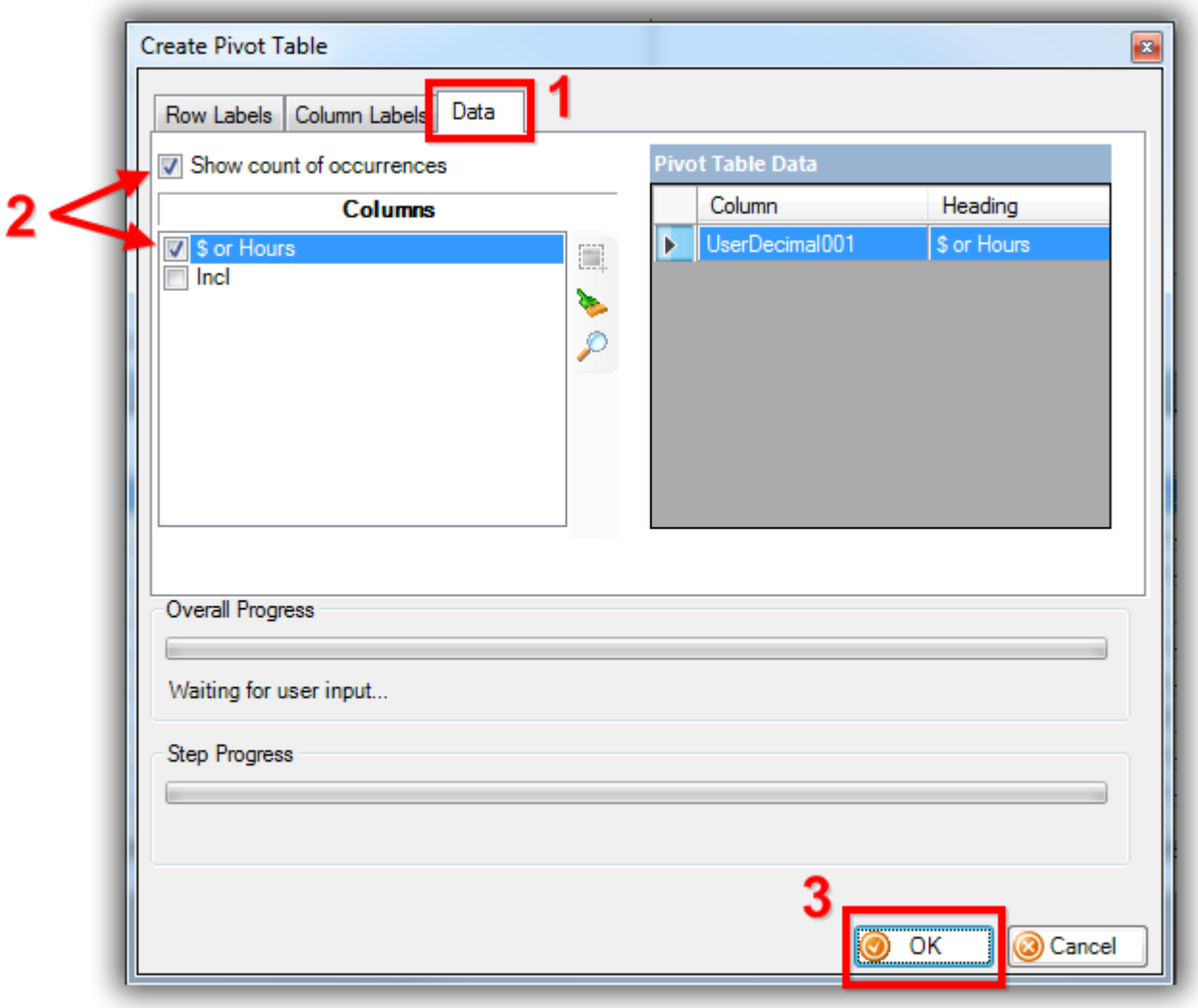
Under the **Column Labels** tab select '**Type**'.

Tracking Grants in Trail Blazer – Requested, Denied, Approved, And How to Build a Pivot Summary Report for Totals



Under to the **Data** tab, select **Show count of occurrences**, **$ or Hours**, and then click **[OK]**.

Tracking Grants in Trail Blazer – Requested, Denied, Approved, And How to Build a Pivot Summary Report for Totals



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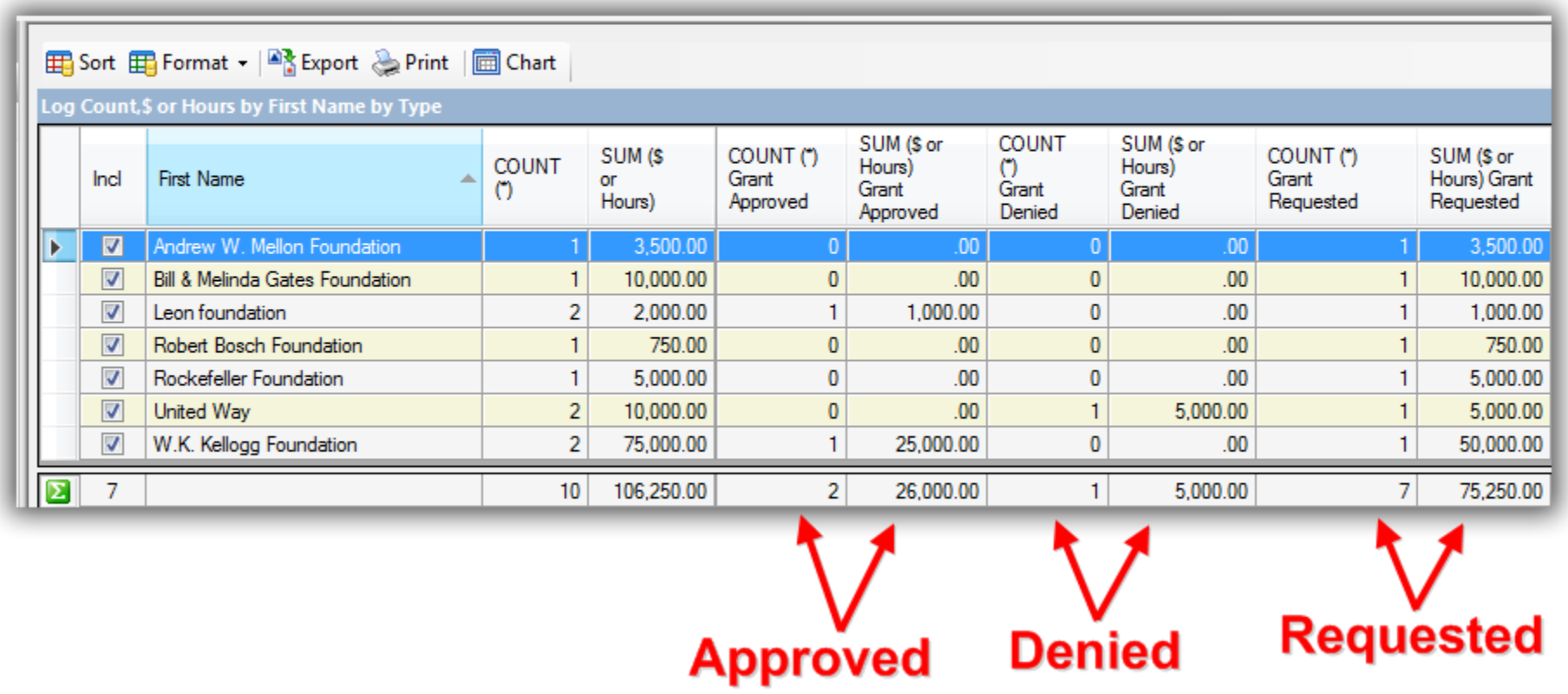
*Below is my example Pivot Table, the report summarizes how many grants have been **requested**, **approved**, and **denied** by each of the foundations as well as the total dollar amounts for each.*

Finished Pivot Table with totals for Grants Requested, Approved, and Denied.



Sort | Format | Export | Print | Chart

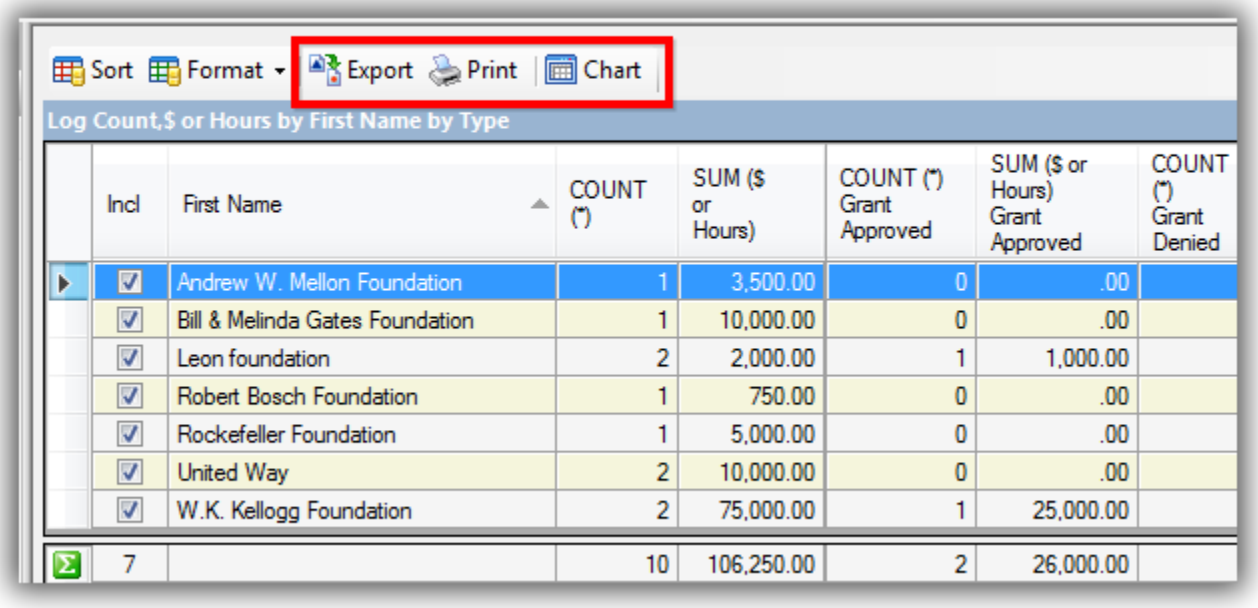
Log Count,$ or Hours by First Name by Type

Incl	First Name	COUNT (*)	SUM ($ or Hours)	COUNT (*) Grant Approved	SUM ($ or Hours) Grant Approved	COUNT (*) Grant Denied	SUM ($ or Hours) Grant Denied	COUNT (*) Grant Requested	SUM ($ or Hours) Grant Requested
☑	Andrew W. Mellon Foundation	1	3,500.00	0	.00	0	.00	1	3,500.00
☑	Bill & Melinda Gates Foundation	1	10,000.00	0	.00	0	.00	1	10,000.00
☑	Leon foundation	2	2,000.00	1	1,000.00	0	.00	1	1,000.00
☑	Robert Bosch Foundation	1	750.00	0	.00	0	.00	1	750.00
☑	Rockefeller Foundation	1	5,000.00	0	.00	0	.00	1	5,000.00
☑	United Way	2	10,000.00	0	.00	1	5,000.00	1	5,000.00
☑	W.K. Kellogg Foundation	2	75,000.00	1	25,000.00	0	.00	1	50,000.00
Σ	7	10	106,250.00	2	26,000.00	1	5,000.00	7	75,250.00

Approved Denied Requested

You can **Export**, **Print**, or **Chart** your pivot table if necessary:

Export, Print, or Chart your Pivot Table



Incl	First Name	COUNT (*)	SUM ($ or Hours)	COUNT (*) Grant Approved	SUM ($ or Hours) Grant Approved	COUNT (*) Grant Denied
☑	Andrew W. Mellon Foundation	1	3,500.00	0	.00	
☑	Bill & Melinda Gates Foundation	1	10,000.00	0	.00	
☑	Leon foundation	2	2,000.00	1	1,000.00	
☑	Robert Bosch Foundation	1	750.00	0	.00	
☑	Rockefeller Foundation	1	5,000.00	0	.00	
☑	United Way	2	10,000.00	0	.00	
☑	W.K. Kellogg Foundation	2	75,000.00	1	25,000.00	
Σ	7	10	106,250.00	2	26,000.00	

You're now finished with this article, take a look at the related help resources below, and don't hesitate to call our support team for 1-on-1 assistance.

#4 Related Resources

Article: Adding Log Types

Article: Adding Log Notes, Mass Log Notes, & Reminders

Video: Reporting 105 – Pivots – summary reporting

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.

** 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.*

Tracking Grants in Trail Blazer – Requested, Denied, Approved, And How to Build a Pivot Summary Report for Totals

** This service is included in your contract.*