

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

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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**”).

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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

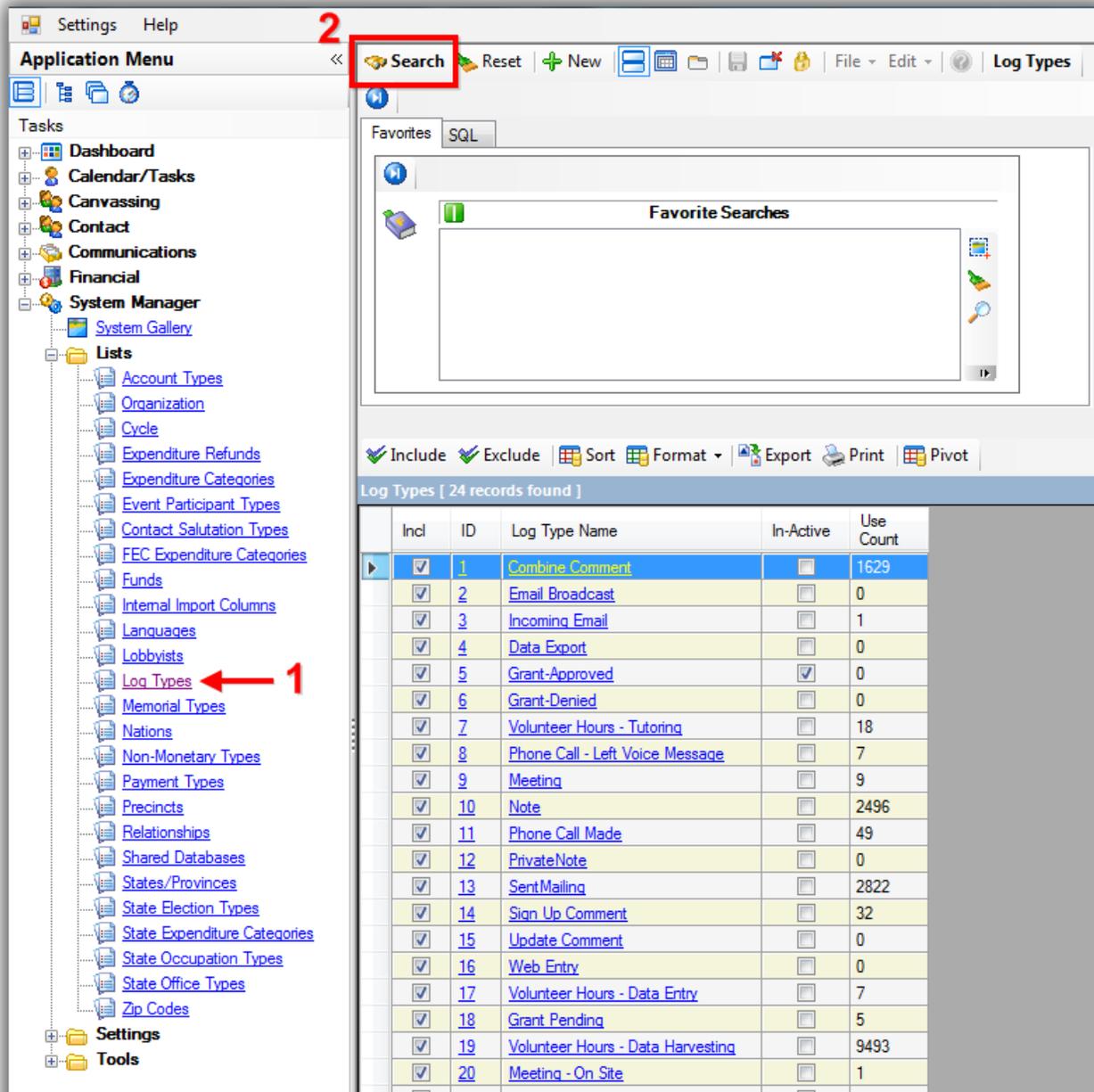
#4 Related Resources

#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.

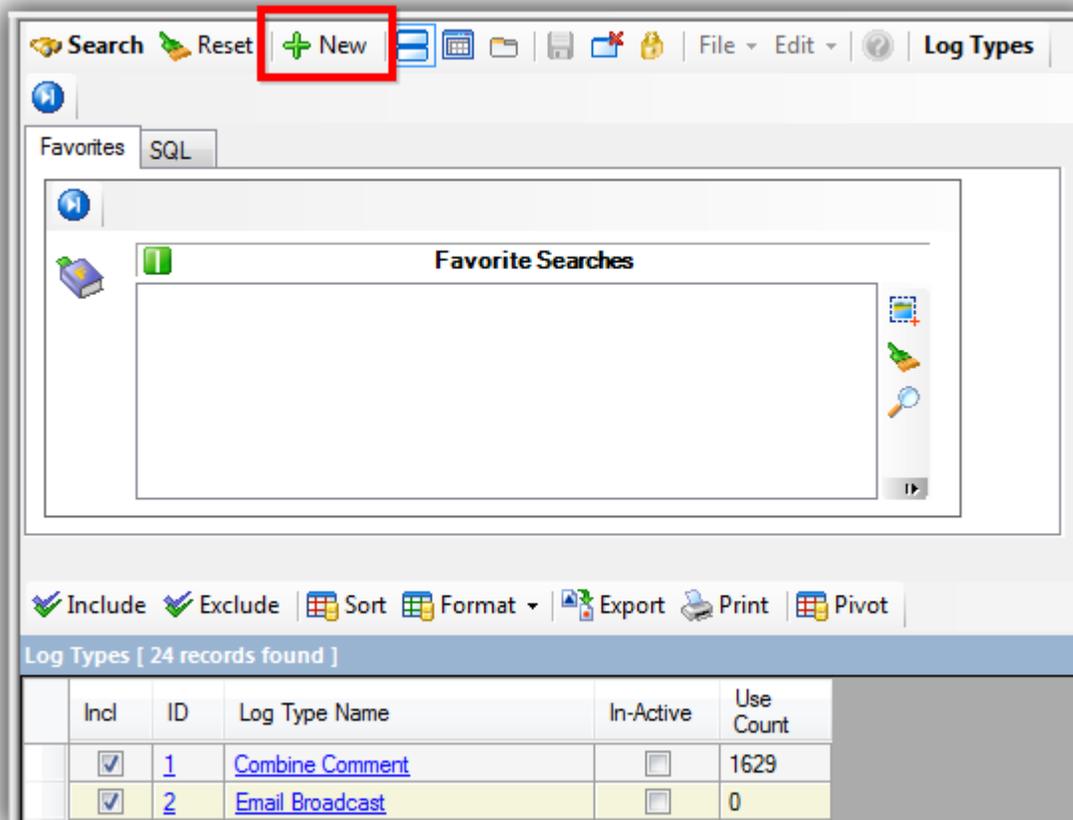


The screenshot shows the TrailBlazer application interface. On the left is a navigation tree with categories like 'Tasks', 'Lists', 'Settings', and 'Tools'. Under 'Lists', 'Log Types' is highlighted with a red arrow and the number '1'. At the top, the 'Search' button is highlighted with a red box and the number '2'. The main window displays a table of 'Log Types' with 24 records found. The table has columns for 'Incl', 'ID', 'Log Type Name', 'In-Active', and 'Use Count'.

Incl	ID	Log Type Name	In-Active	Use Count
<input checked="" type="checkbox"/>	1	Combine Comment	<input type="checkbox"/>	1629
<input checked="" type="checkbox"/>	2	Email Broadcast	<input type="checkbox"/>	0
<input checked="" type="checkbox"/>	3	Incoming Email	<input type="checkbox"/>	1
<input checked="" type="checkbox"/>	4	Data Export	<input type="checkbox"/>	0
<input checked="" type="checkbox"/>	5	Grant-Approved	<input checked="" type="checkbox"/>	0
<input checked="" type="checkbox"/>	6	Grant-Denied	<input type="checkbox"/>	0
<input checked="" type="checkbox"/>	7	Volunteer Hours - Tutoring	<input type="checkbox"/>	18
<input checked="" type="checkbox"/>	8	Phone Call - Left Voice Message	<input type="checkbox"/>	7
<input checked="" type="checkbox"/>	9	Meeting	<input type="checkbox"/>	9
<input checked="" type="checkbox"/>	10	Note	<input type="checkbox"/>	2496
<input checked="" type="checkbox"/>	11	Phone Call Made	<input type="checkbox"/>	49
<input checked="" type="checkbox"/>	12	PrivateNote	<input type="checkbox"/>	0
<input checked="" type="checkbox"/>	13	SentMailing	<input type="checkbox"/>	2822
<input checked="" type="checkbox"/>	14	Sign Up Comment	<input type="checkbox"/>	32
<input checked="" type="checkbox"/>	15	Update Comment	<input type="checkbox"/>	0
<input checked="" type="checkbox"/>	16	Web Entry	<input type="checkbox"/>	0
<input checked="" type="checkbox"/>	17	Volunteer Hours - Data Entry	<input type="checkbox"/>	7
<input checked="" type="checkbox"/>	18	Grant Pending	<input type="checkbox"/>	5
<input checked="" type="checkbox"/>	19	Volunteer Hours - Data Harvesting	<input type="checkbox"/>	9493
<input checked="" type="checkbox"/>	20	Meeting - On Site	<input type="checkbox"/>	1

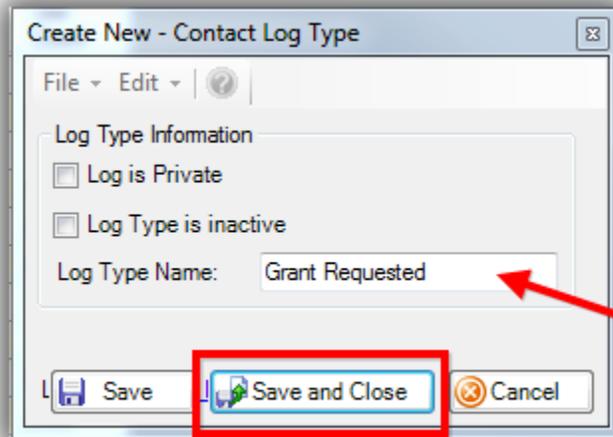
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Click **[+ New]** on the search tool strip to begin adding a new log type.



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

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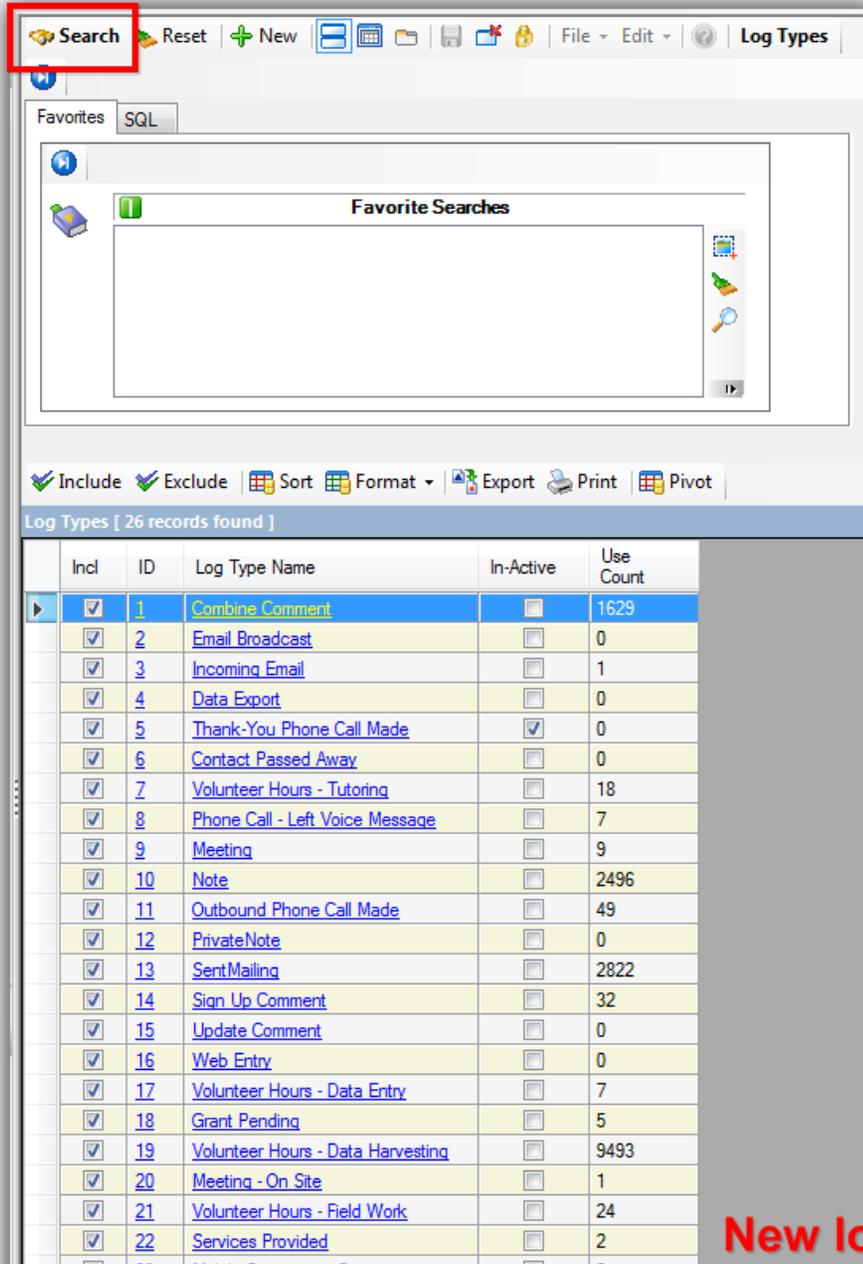


**Provide a name
for your new log type.**

*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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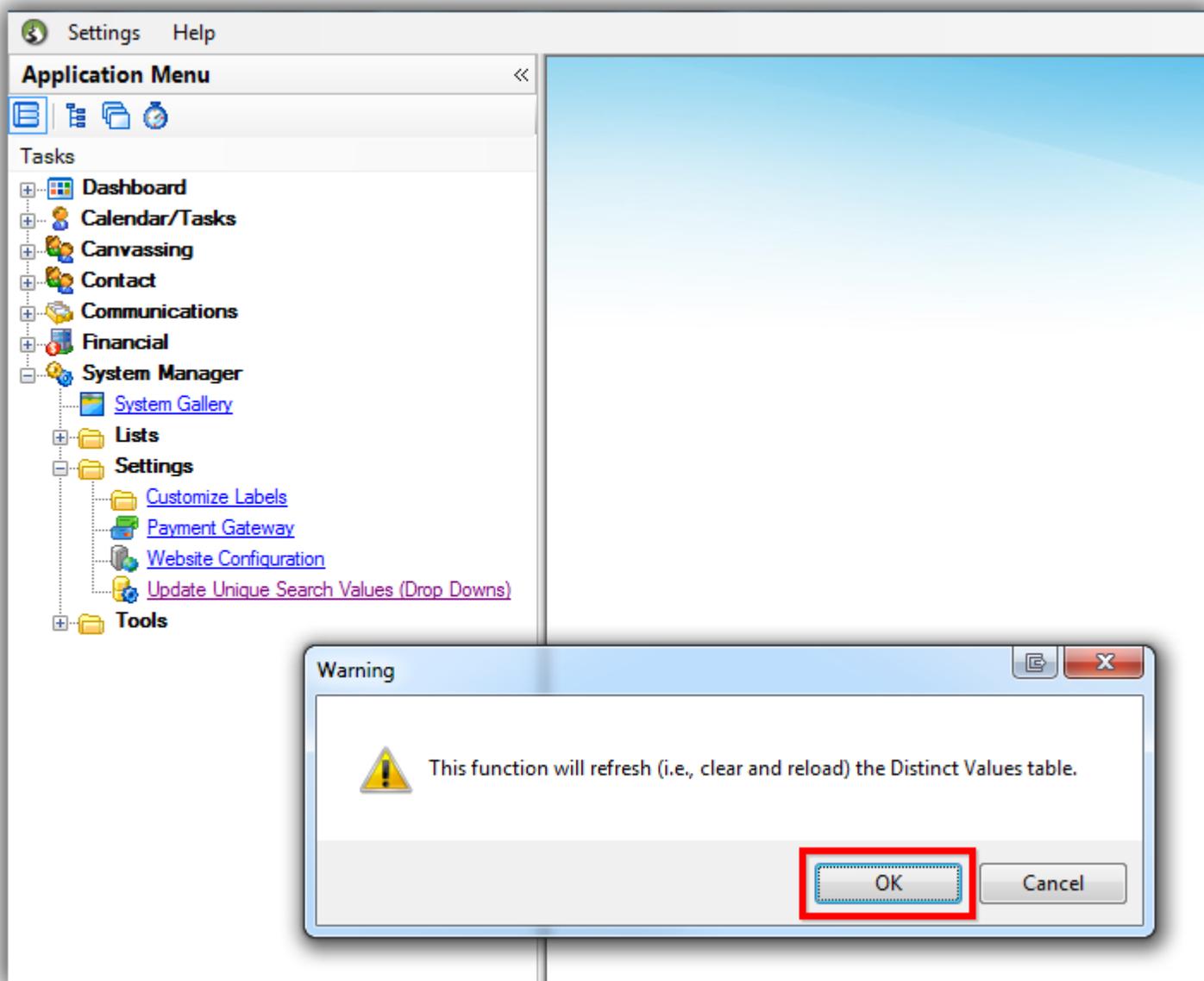
The screenshot shows the TrailBlazer software interface. At the top, there is a search bar with a magnifying glass icon, highlighted by a red box. Below the search bar are various menu options: Reset, New, File, Edit, and Log Types. The main area is divided into 'Favorites' and 'SQL' tabs. Below these is a 'Favorite Searches' section. At the bottom, there is a toolbar with options: Include, Exclude, Sort, Format, Export, Print, and Pivot. Below the toolbar, a status bar indicates 'Log Types [26 records found]'. The main data area is a table with the following columns: Incl, ID, Log Type Name, In-Active, and Use Count.

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

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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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The screenshot shows the TrailBlazer application interface. On the left is a 'Tasks' sidebar with a tree view containing 'Dashboard', 'Calendar/Tasks', 'Canvassing', 'Contact', 'Contributions/Pledges', 'Product Sales', 'Logs', 'Communications', 'Financial', and 'System Manager'. The 'Contact' folder is expanded, and the 'Foundations' sub-item is selected, indicated by a red arrow labeled '1'. At the top, the 'Search' button is highlighted with a red box and a red arrow labeled '3'. Below the search bar, there are tabs for 'General', 'Address', 'Household', 'Attribute', 'Canvass', 'Contribute', 'Pledge', 'Event', 'Log', 'Admin', and 'SQL'. The 'General' tab is active, showing search criteria for 'Individual', 'Corporation', and 'Foundation' (checked), with a red arrow labeled '2' pointing to the 'Foundation' checkbox. Search fields include 'Last Name', 'First/Org Name', 'Middle Name', 'Nickname', 'Prior Last Name', 'Title', and 'Suffix'. Below the search criteria are buttons for 'Edit', 'Include', 'Exclude', 'Sort', 'Format', 'Export', 'Print', 'Detail', 'Summary', and 'Pivot'. The main area displays a table of search results for 'Contacts [29 records found]'. A red arrow labeled '4' points to the 'Robert Wood Johnson Foundation' entry in the table.

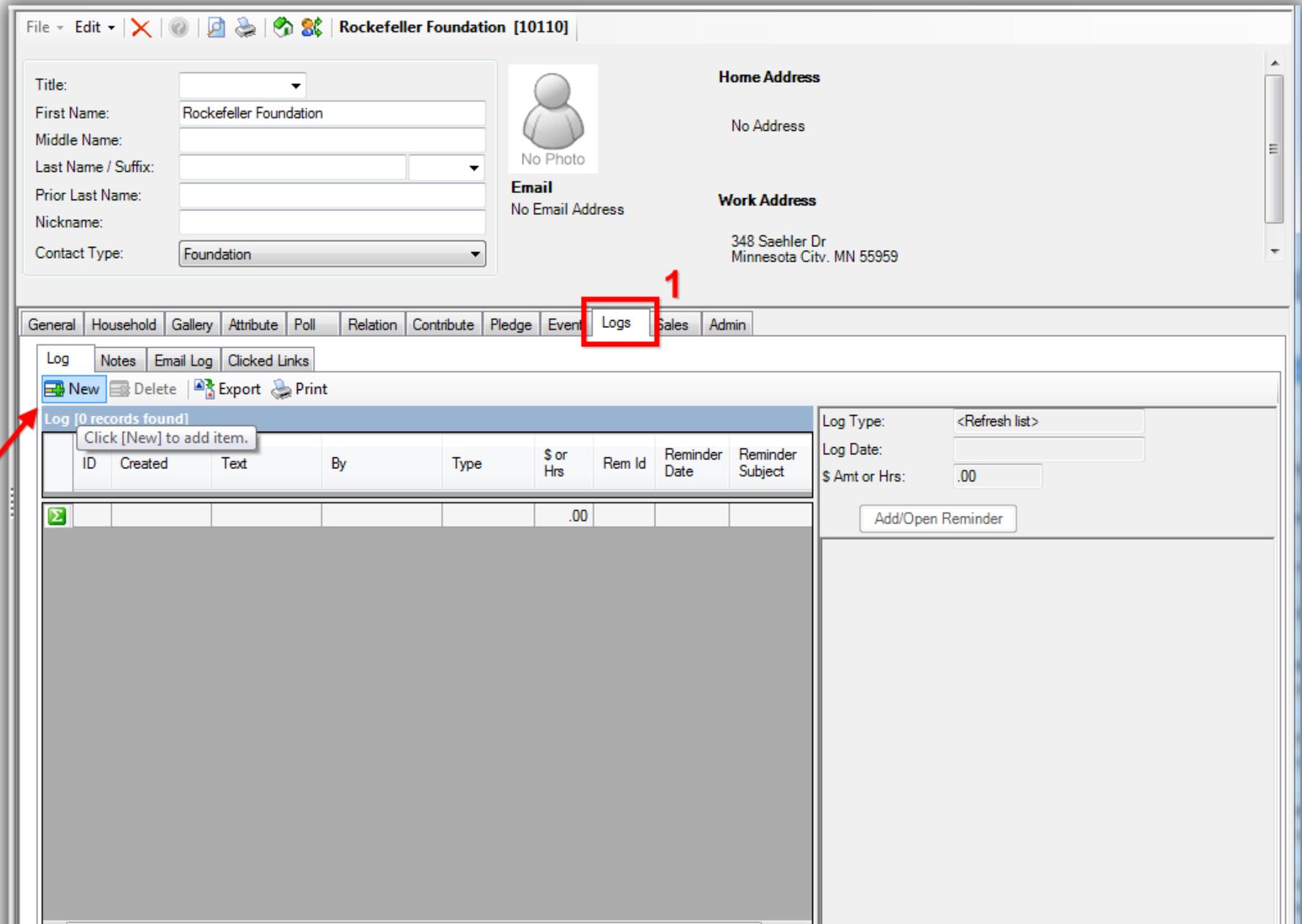
Incl	ID	First Name	Address Type	Address	Address Line 2	City	State	Zip Code
<input checked="" type="checkbox"/>	9381	Ameriprise Financial						
<input checked="" type="checkbox"/>	10102	Andrew W. Mellon Foundation	Work	5815 Michael Ct		St Cloud	MN	56303
<input checked="" type="checkbox"/>	10086	Bill & Melinda Gates Foundation	Work	9 Westkaemper Apts Csb		St Joseph	MN	56374
<input checked="" type="checkbox"/>	9305	BNA Foundation						
<input checked="" type="checkbox"/>	10109	Calouste Gulbenkian Foundation	Work	316 Caesar Dr		Lakeville	MN	55044
<input checked="" type="checkbox"/>	10101	David And Lucile Packard Foundation	Work	910 Rae Dr	Apt 3	Richfield	MN	55423
<input checked="" type="checkbox"/>	10089	Ford Foundation	Work	17760 Ballantrae Cir		Eden Prairie	MN	55347
<input checked="" type="checkbox"/>	10099	Garfield Weston Foundation	Work	33492 Aerie Heights Ln		La Crescent	MN	55947
<input checked="" type="checkbox"/>	10104	Gordon And Betty Moore Foundation	Work	235 Hi-mae Cir		Lester Prairie	MN	55354
<input checked="" type="checkbox"/>	10103	John D. And Catherine T. Macarthur Foundation	Work	3455 Michael Ave		White Bear Lake	MN	55110
<input checked="" type="checkbox"/>	10106	Knut And Alice Wallenberg Foundation	Work	3835 Ballantrae Rd	Apt 7	Eagan	MN	55122
<input checked="" type="checkbox"/>	12682	Leon foundation						
<input checked="" type="checkbox"/>	10092	Li Ka Shing Foundation	Work	29358 Kraemer Lake Rd		St Joseph	MN	56374
<input checked="" type="checkbox"/>	9403	Lou's Granting Foundation						
<input checked="" type="checkbox"/>	10094	Mohammed Bin Rashid Al Maktoum Foundation	Work	5264 Michael Ln		Minnetonka	MN	55345
<input checked="" type="checkbox"/>	10165	National Science Foundation	Work	112130 Haering Ln		Chaska	MN	55318
<input checked="" type="checkbox"/>	10100	Robert Bosch Foundation	Work	112108 Haering Cir		Chaska	MN	55318
<input checked="" type="checkbox"/>	10093	Robert Wood Johnson Foundation	Work	56 Michael St		St Paul	MN	55119
<input checked="" type="checkbox"/>	10110	Rockefeller Foundation	Work	348 Saehler Dr		Minnesota City	MN	55959

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

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

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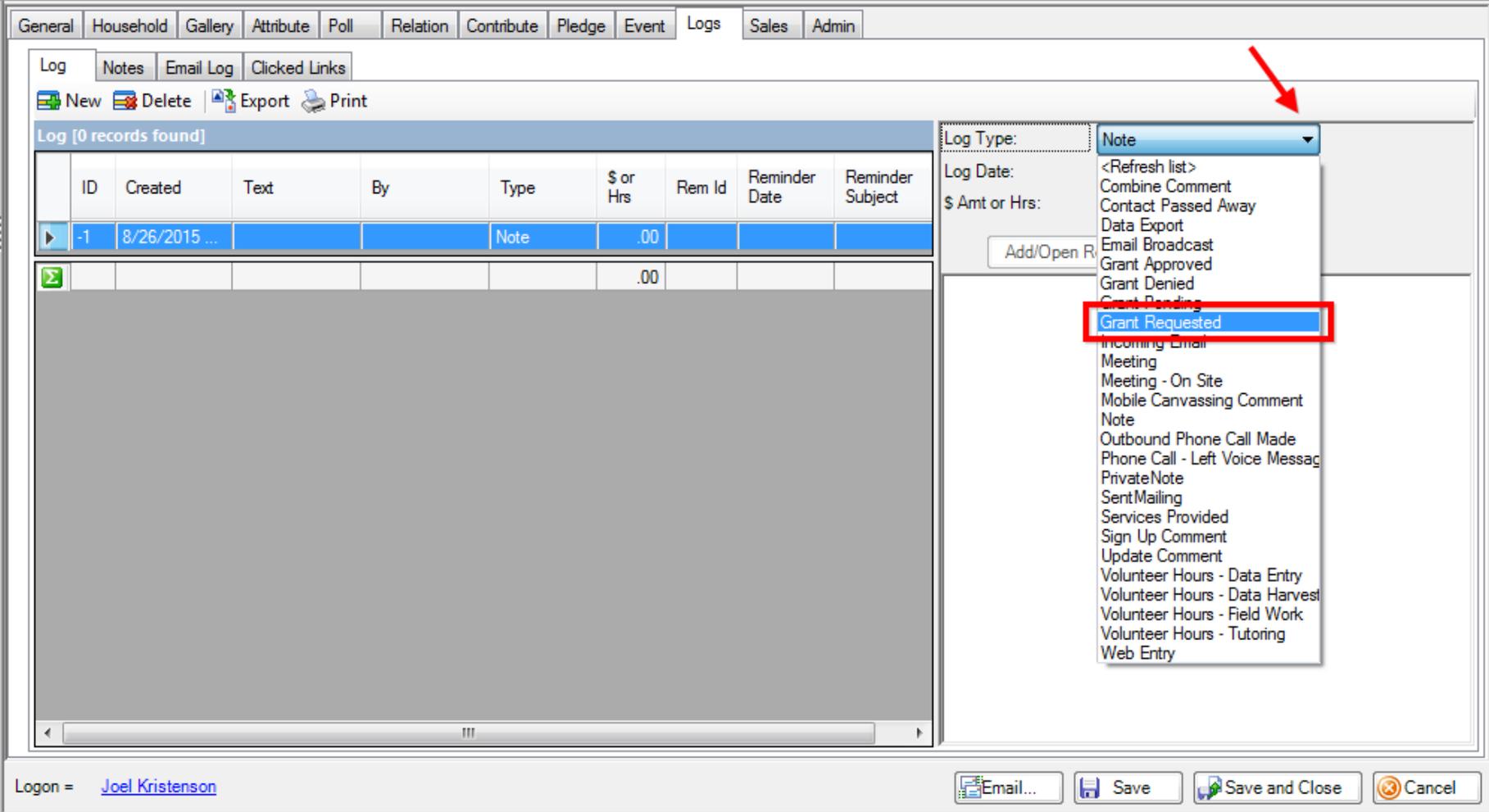
The screenshot shows the TrailBlazer interface for the 'Rockefeller Foundation [10110]'. The 'Logs' tab is selected and highlighted with a red box and a red arrow labeled '1'. Below the tabs, there are buttons for 'New', 'Delete', 'Export', and 'Print'. A red arrow labeled '2' points to the 'New' button. The main area displays a table with the following columns: ID, Created, Text, By, Type, \$ or Hrs, Rem Id, Reminder Date, and Reminder Subject. The table contains one record with a value of '.00' in the '\$ or Hrs' column. To the right of the table, there are input fields for 'Log Type' (set to '<Refresh list>'), 'Log Date', and '\$ Amt or Hrs' (set to '.00'), along with an 'Add/Open Reminder' button.

ID	Created	Text	By	Type	\$ or Hrs	Rem Id	Reminder Date	Reminder Subject
					.00			

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

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The screenshot shows the TrailBlazer software interface. At the top, there are tabs for various categories: General, Household, Gallery, Attribute, Poll, Relation, Contribute, Pledge, Event, Logs, Sales, and Admin. The 'Logs' tab is selected. Below the tabs, there are sub-tabs for 'Log', 'Notes', 'Email Log', and 'Clicked Links'. A toolbar contains icons for 'New', 'Delete', 'Export', and 'Print'. The main area displays a table with the following columns: ID, Created, Text, By, Type, \$ or Hrs, Rem Id, Reminder Date, and Reminder Subject. A single record is visible with ID -1, Created 8/26/2015, Type Note, and \$ or Hrs .00. To the right of the table is a 'Log Type' dropdown menu. A red arrow points to the dropdown arrow, and a red box highlights the 'Grant Requested' option in the list. Other options include '<Refresh list>', 'Combine Comment', 'Contact Passed Away', 'Data Export', 'Email Broadcast', 'Grant Approved', 'Grant Denied', 'Grant Pending', 'Incoming Email', 'Meeting', 'Meeting - On Site', 'Mobile Canvassing Comment', 'Note', 'Outbound Phone Call Made', 'Phone Call - Left Voice Message', 'Private Note', 'Sent Mailing', 'Services Provided', 'Sign Up Comment', 'Update Comment', 'Volunteer Hours - Data Entry', 'Volunteer Hours - Data Harvest', 'Volunteer Hours - Field Work', 'Volunteer Hours - Tutoring', and 'Web Entry'. At the bottom, there are buttons for 'Email...', 'Save', 'Save and Close', and 'Cancel'. The status bar at the bottom left shows 'Logon = Joel Kristenson'.

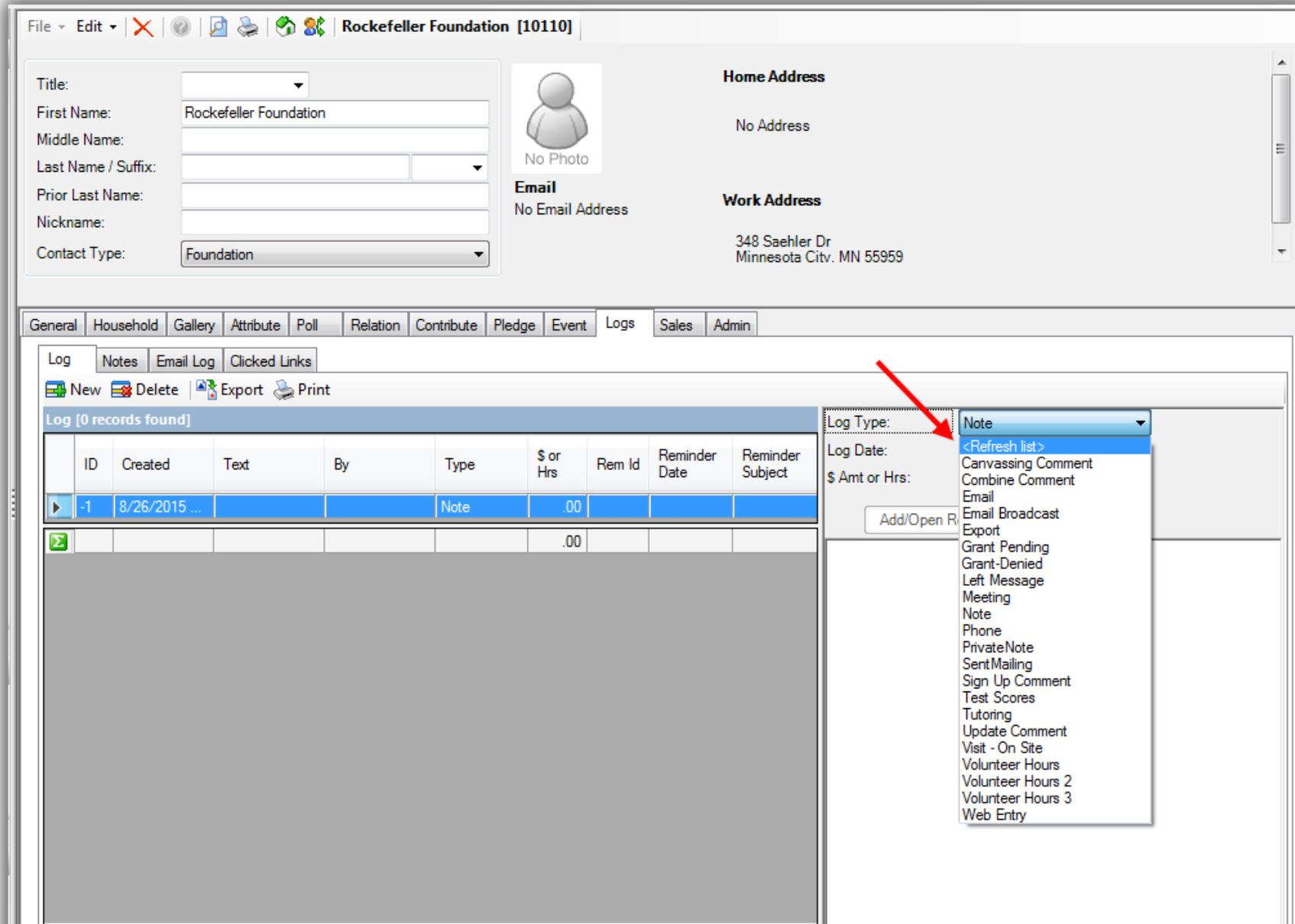
ID	Created	Text	By	Type	\$ or Hrs	Rem Id	Reminder Date	Reminder Subject
-1	8/26/2015 ...			Note	.00			

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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'.



The screenshot shows the TrailBlazer interface for a record titled "Rockefeller Foundation [10110]". The record details include fields for Title, First Name (Rockefeller Foundation), Middle Name, Last Name / Suffix, Prior Last Name, Nickname, and Contact Type (Foundation). It also shows Home Address (No Address) and Work Address (348 Saehler Dr, Minnesota Ctv. MN 55959). Below the record details is a navigation bar with tabs for General, Household, Gallery, Attribute, Poll, Relation, Contribute, Pledge, Event, Logs, Sales, and Admin. The "Logs" tab is active, showing a table with 0 records found. A dropdown menu for "Log Type" is open, displaying various options including Note, <Refresh list>, Canvassing Comment, Combine Comment, Email, Email Broadcast, Export, Grant Pending, Grant-Denied, Left Message, Meeting, Note, Phone, PrivateNote, SentMailing, Sign Up Comment, Test Scores, Tutoring, Update Comment, Visit - On Site, Volunteer Hours, Volunteer Hours 2, Volunteer Hours 3, and Web Entry. A red arrow points to the "<Refresh list>" option.

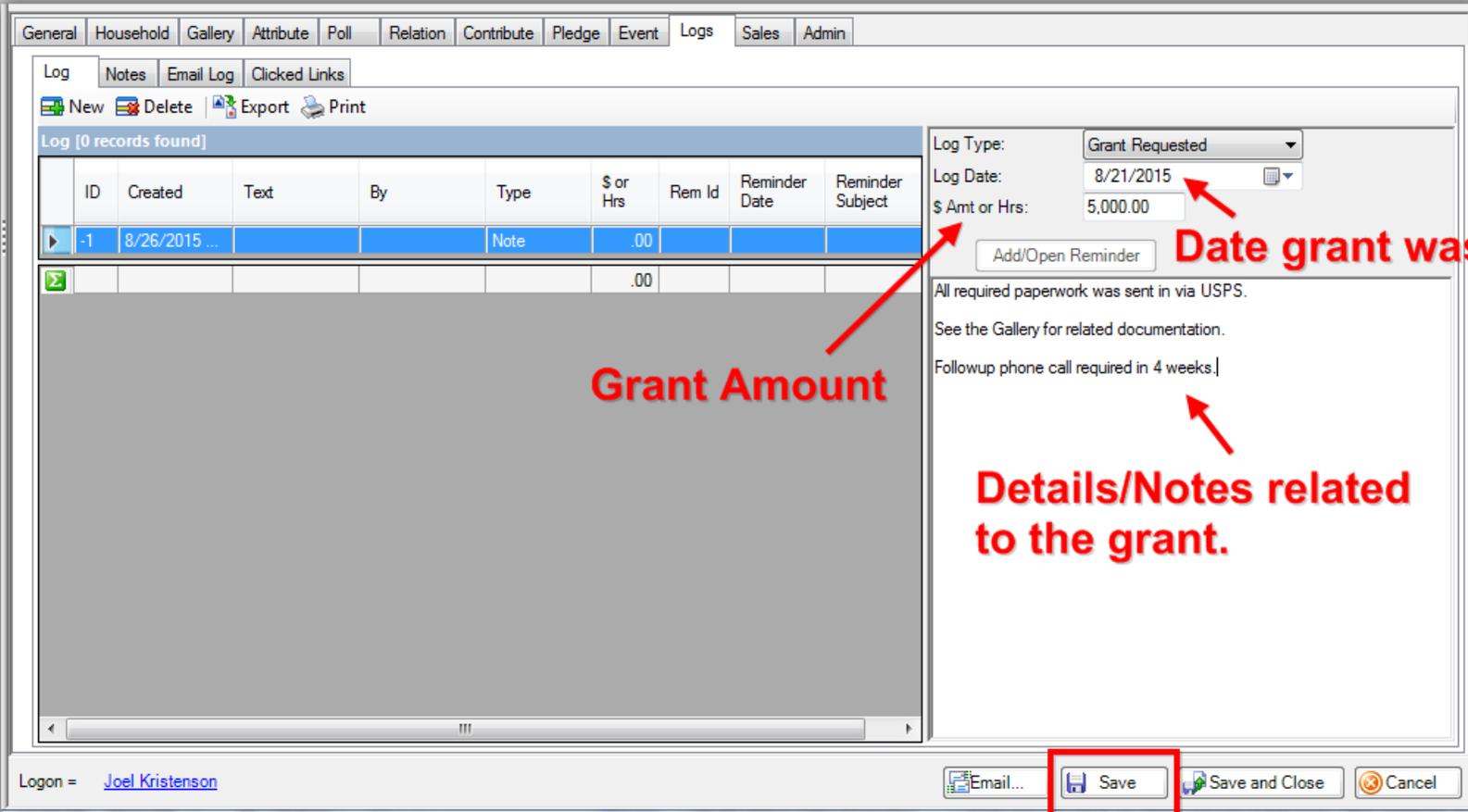
ID	Created	Text	By	Type	\$ or Hrs	Rem Id	Reminder Date	Reminder Subject
-1	8/26/2015 ...			Note	.00			

- Log Type: Note
- <Refresh list>
- Canvassing Comment
- Combine Comment
- Email
- Email Broadcast
- Export
- Grant Pending
- Grant-Denied
- Left Message
- Meeting
- Note
- Phone
- PrivateNote
- SentMailing
- Sign Up Comment
- Test Scores
- Tutoring
- Update Comment
- Visit - On Site
- Volunteer Hours
- Volunteer Hours 2
- Volunteer Hours 3
- Web Entry

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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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General Household Gallery Attribute Poll Relation Contribute Pledge Event Logs Sales Admin

Log Notes Email Log Clicked Links

New Delete Export Print

Log [0 records found]

ID	Created	Text	By	Type	\$ or Hrs	Rem Id	Reminder Date	Reminder Subject
-1	8/26/2015 ...			Note	.00			

Log Type: Grant Requested

Log Date: 8/21/2015

\$ Amt or Hrs: 5,000.00

Add/Open Reminder

All required paperwork was sent in via USPS.
See the Gallery for related documentation.
Followup phone call required in 4 weeks.

Logon = Joel Kristenson

Email... Save Save and Close Cancel

Date grant was requested.

Grant Amount

Details/Notes related to the grant.

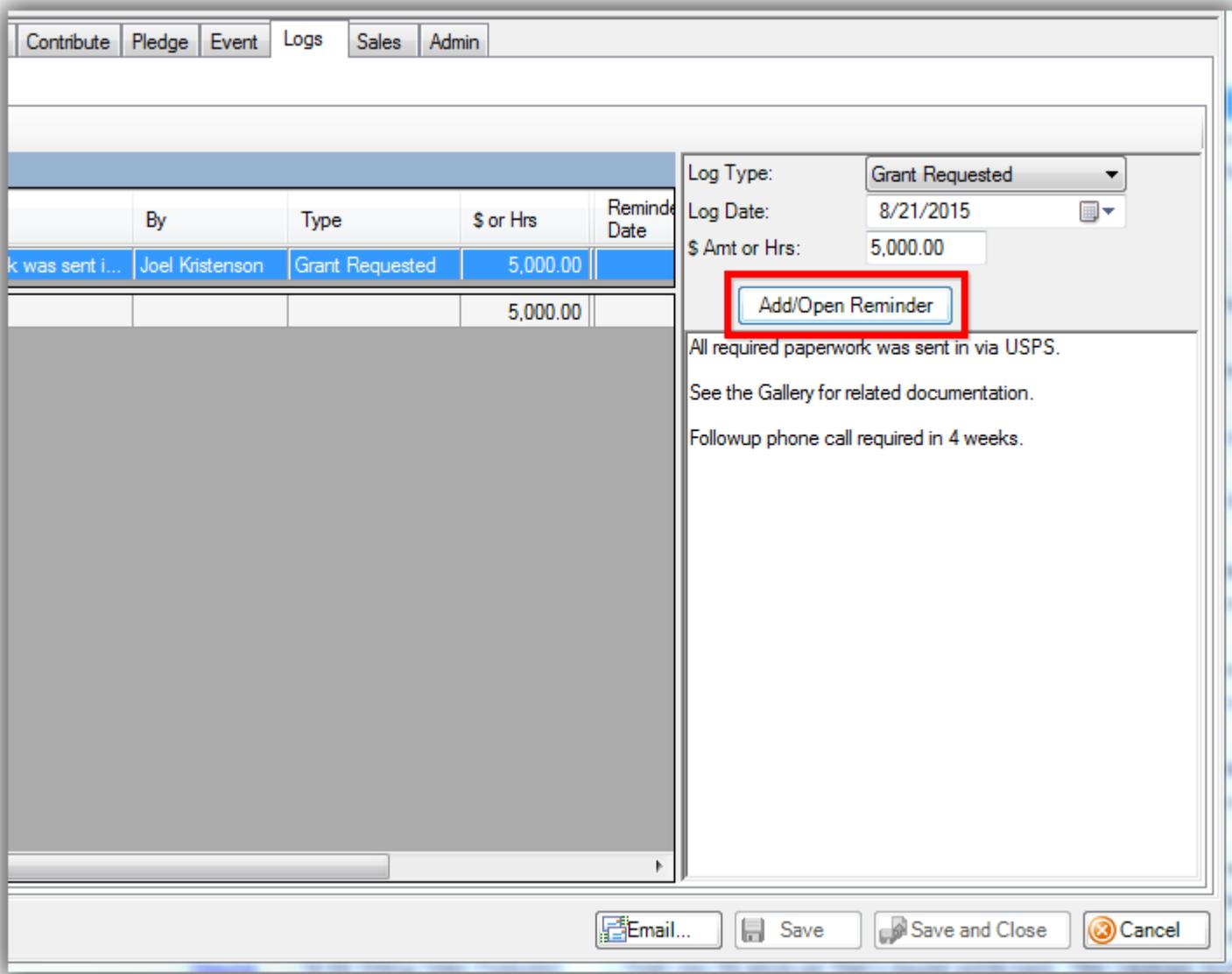
Once all other information is entered click [Save].

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.

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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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The screenshot shows the TrailBlazer software interface. At the top, there are navigation tabs: Contribute, Pledge, Event, Logs, Sales, and Admin. Below these is a table with columns: By, Type, \$ or Hrs, and Remind Date. A row is highlighted with a blue background, showing 'Joel Kristenson' as the person, 'Grant Requested' as the type, and '5,000.00' as the amount. To the right of the table is a form for editing the log entry. The 'Log Type' dropdown is set to 'Grant Requested', the 'Log Date' is '8/21/2015', and the '\$ Amt or Hrs' is '5,000.00'. A red box highlights the 'Add/Open Reminder' button. Below the form is a text area containing the following text: 'All required paperwork was sent in via USPS. See the Gallery for related documentation. Followup phone call required in 4 weeks.' At the bottom of the window are buttons for 'Email...', 'Save', 'Save and Close', and 'Cancel'.

By	Type	\$ or Hrs	Remind Date
Joel Kristenson	Grant Requested	5,000.00	

Log Type: Grant Requested
Log Date: 8/21/2015
\$ Amt or Hrs: 5,000.00

Add/Open Reminder

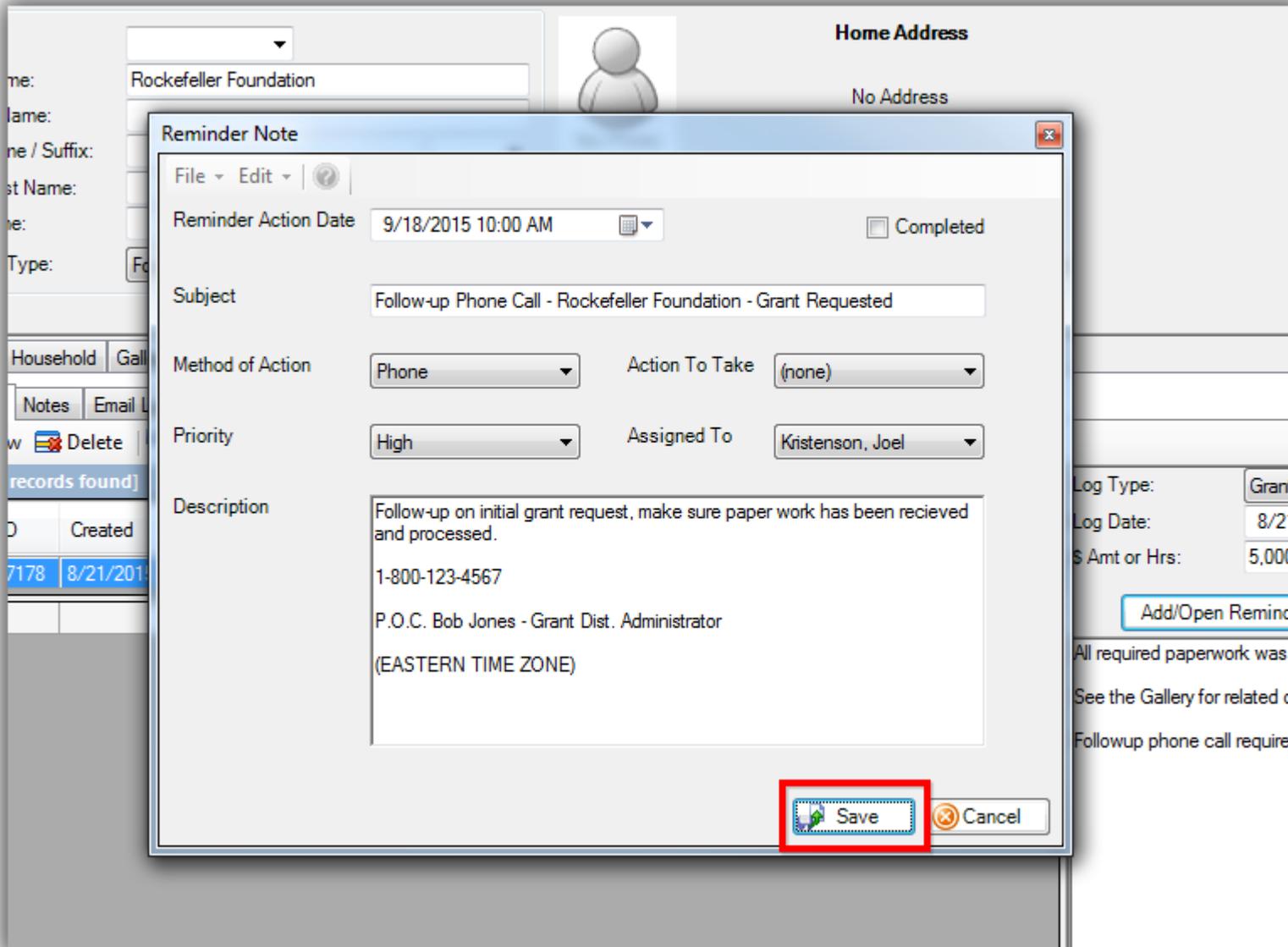
All required paperwork was sent in via USPS.
See the Gallery for related documentation.
Followup phone call required in 4 weeks.

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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.



The screenshot displays a 'Reminder Note' dialog box within the TrailBlazer application. The background shows a record for the 'Rockefeller Foundation' with a 'Home Address' of 'No Address'. The dialog box contains the following information:

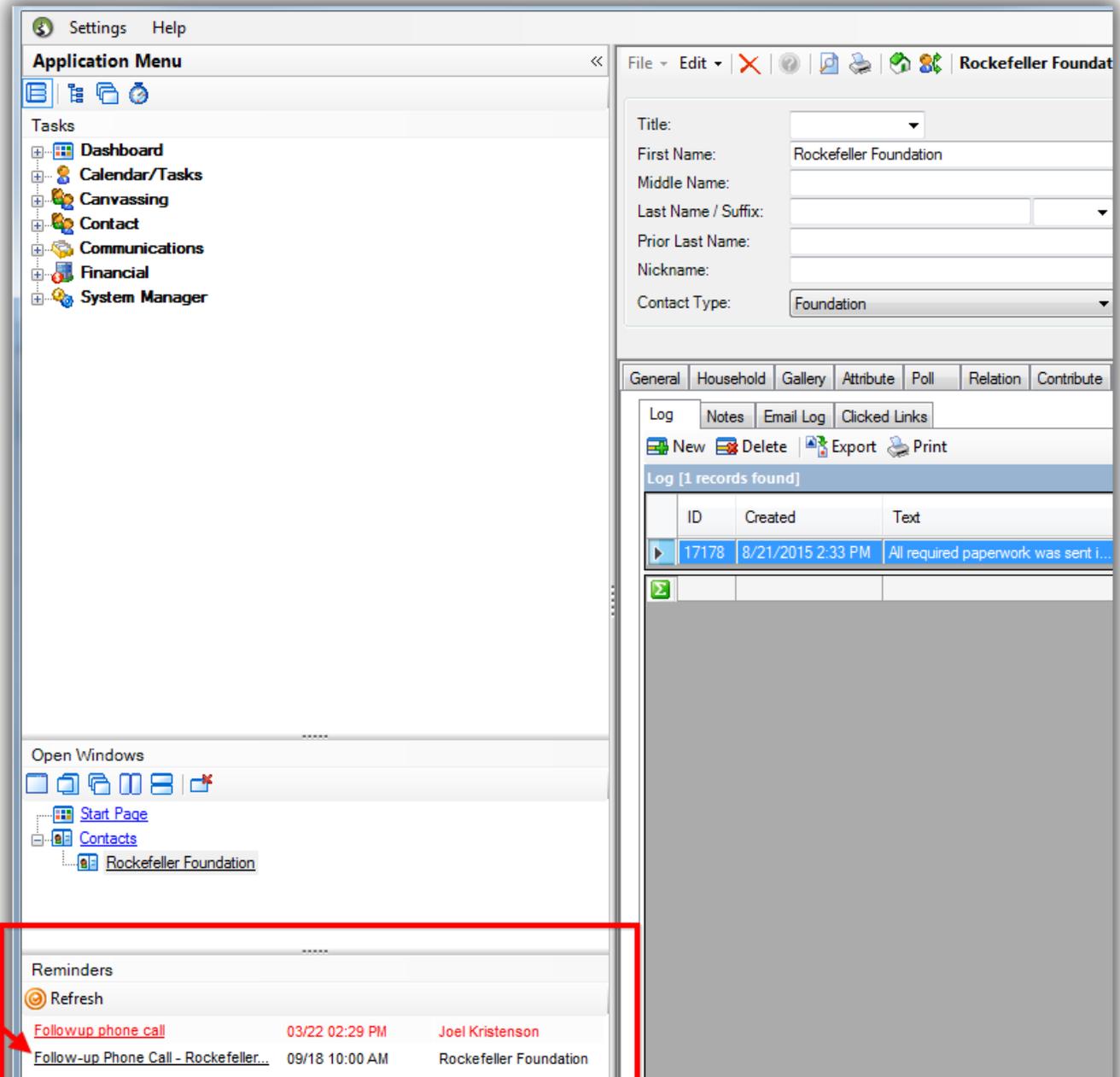
- Reminder Action Date:** 9/18/2015 10:00 AM
- Completed:**
- Subject:** Follow-up Phone Call - Rockefeller Foundation - Grant Requested
- Method of Action:** Phone
- Action To Take:** (none)
- Priority:** High
- Assigned To:** Kristenson, Joel
- Description:** Follow-up on initial grant request, make sure paper work has been recieved and processed.
1-800-123-4567
P.O.C. Bob Jones - Grant Dist. Administrator
(EASTERN TIME ZONE)

At the bottom of the dialog box, the 'Save' button is highlighted with a red box, and the 'Cancel' button is visible to its right.

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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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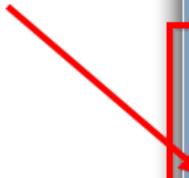


The screenshot shows the TrailBlazer application interface. On the left is the 'Application Menu' with tasks like Dashboard, Calendar/Tasks, Canvassing, Contact, Communications, Financial, and System Manager. The main area displays a contact record for 'Rockefeller Foundation' with fields for Title, First Name, Middle Name, Last Name / Suffix, Prior Last Name, Nickname, and Contact Type (set to Foundation). Below this are tabs for General, Household, Gallery, Attribute, Poll, Relation, and Contribute. A 'Log' section shows one record with ID 17178, created on 8/21/2015 at 2:33 PM, with the text 'All required paperwork was sent i...'. At the bottom left, the 'Reminders' section is highlighted with a red box and contains a 'Refresh' button and two reminder entries:

Reminder Title	Due Date	Assigned To
Followup phone call	03/22 02:29 PM	Joel Kristenson
Follow-up Phone Call - Rockefeller...	09/18 10:00 AM	Rockefeller Foundation

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

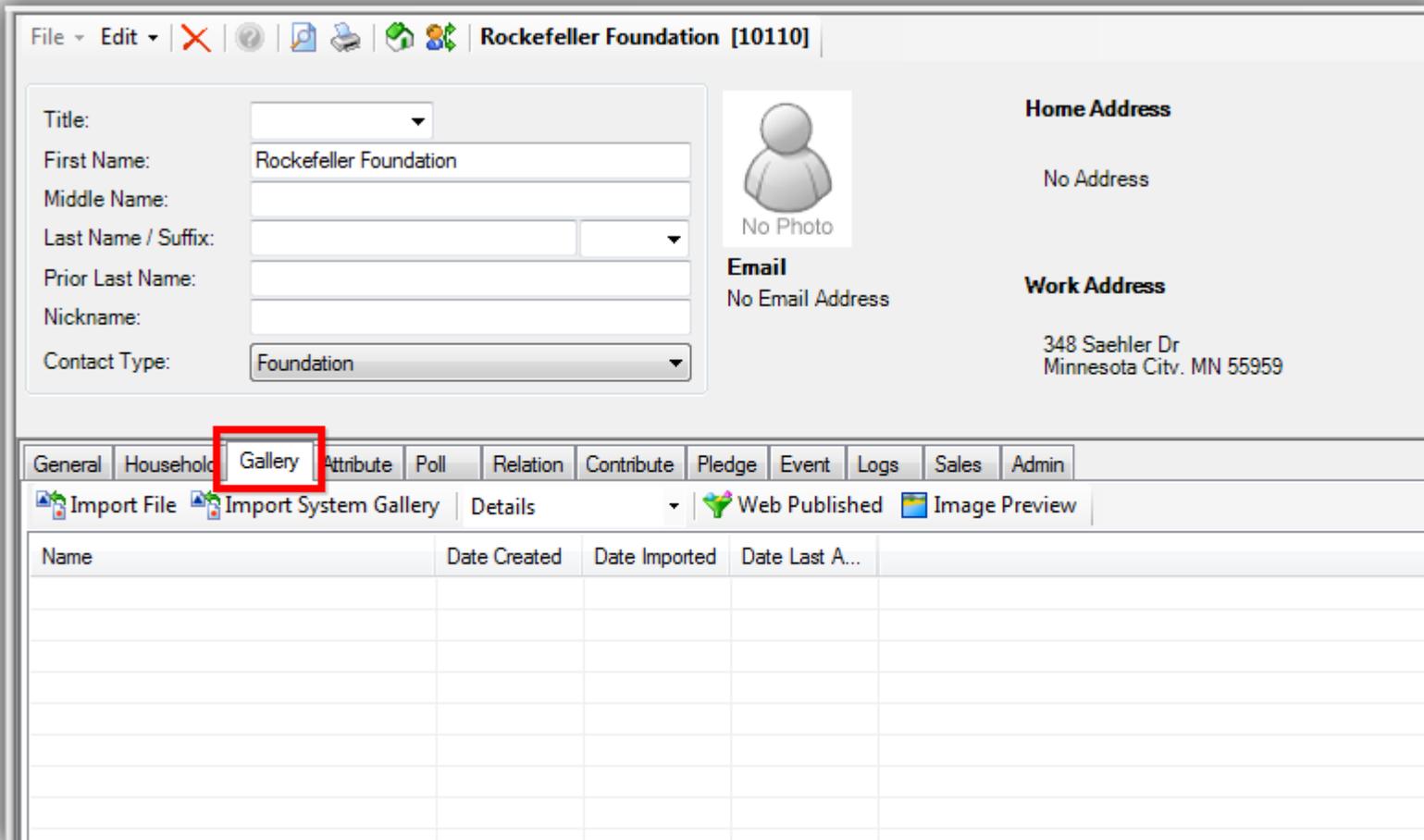
You may need to click 'refresh' if you don't see it right away. If it's past due it will turn red.



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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**. *If you don't have any you can skip this step.*

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The screenshot shows the TrailBlazer interface for a contact named 'Rockefeller Foundation [10110]'. The interface includes a menu bar (File, Edit), a toolbar with icons for various actions, and a main content area with several sections:

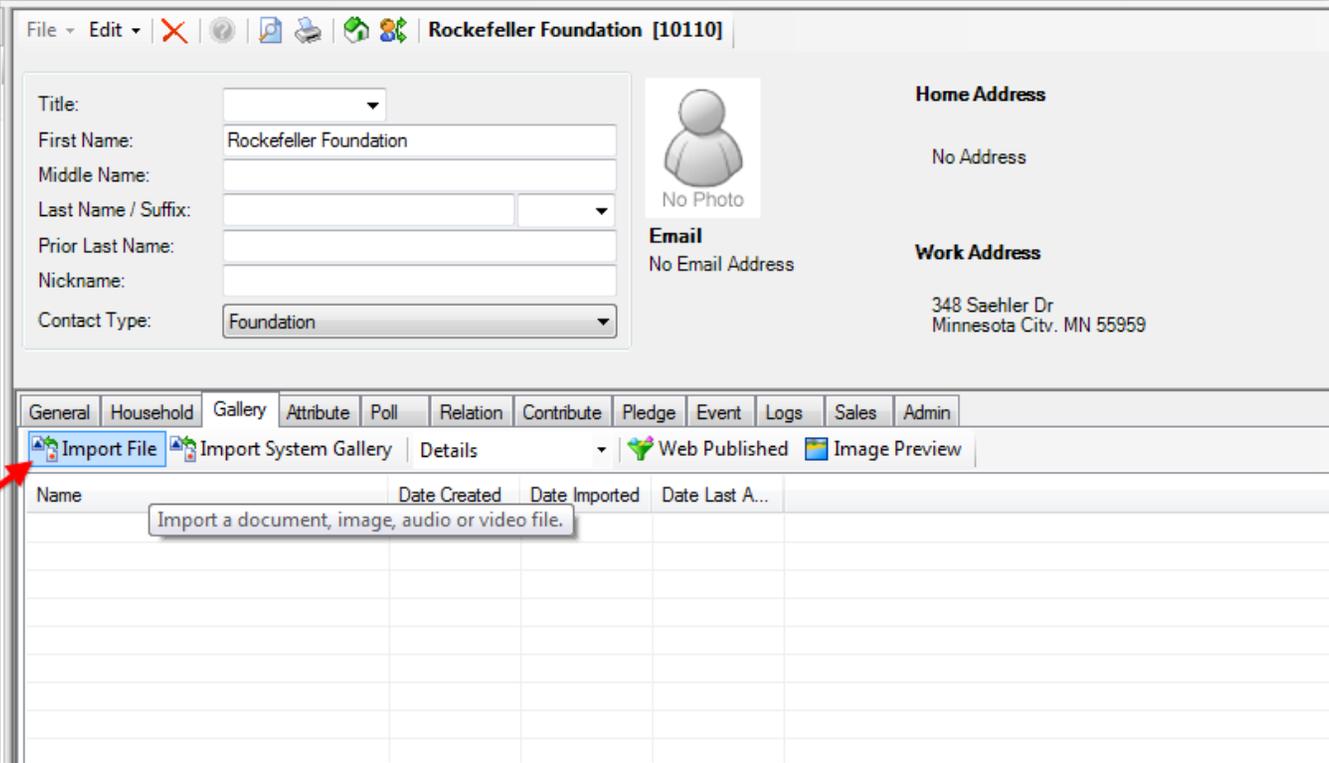
- Title:** A dropdown menu.
- First Name:** Rockefeller Foundation
- Middle Name:** (empty)
- Last Name / Suffix:** (empty)
- Prior Last Name:** (empty)
- Nickname:** (empty)
- Contact Type:** Foundation
- Home Address:** No Address
- Work Address:** 348 Saehler Dr, Minnesota City, MN 55959
- Email:** No Email Address
- Photo:** No Photo

Below the contact details is a tabbed interface with the following tabs: General, Household, **Gallery** (highlighted with a red box), Attribute, Poll, Relation, Contribute, Pledge, Event, Logs, Sales, Admin. Below the tabs is a toolbar with buttons for 'Import File', 'Import System Gallery', 'Details', 'Web Published', and 'Image Preview'. Below the toolbar is a table with the following columns: Name, Date Created, Date Imported, Date Last A... (truncated).

Name	Date Created	Date Imported	Date Last A...

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

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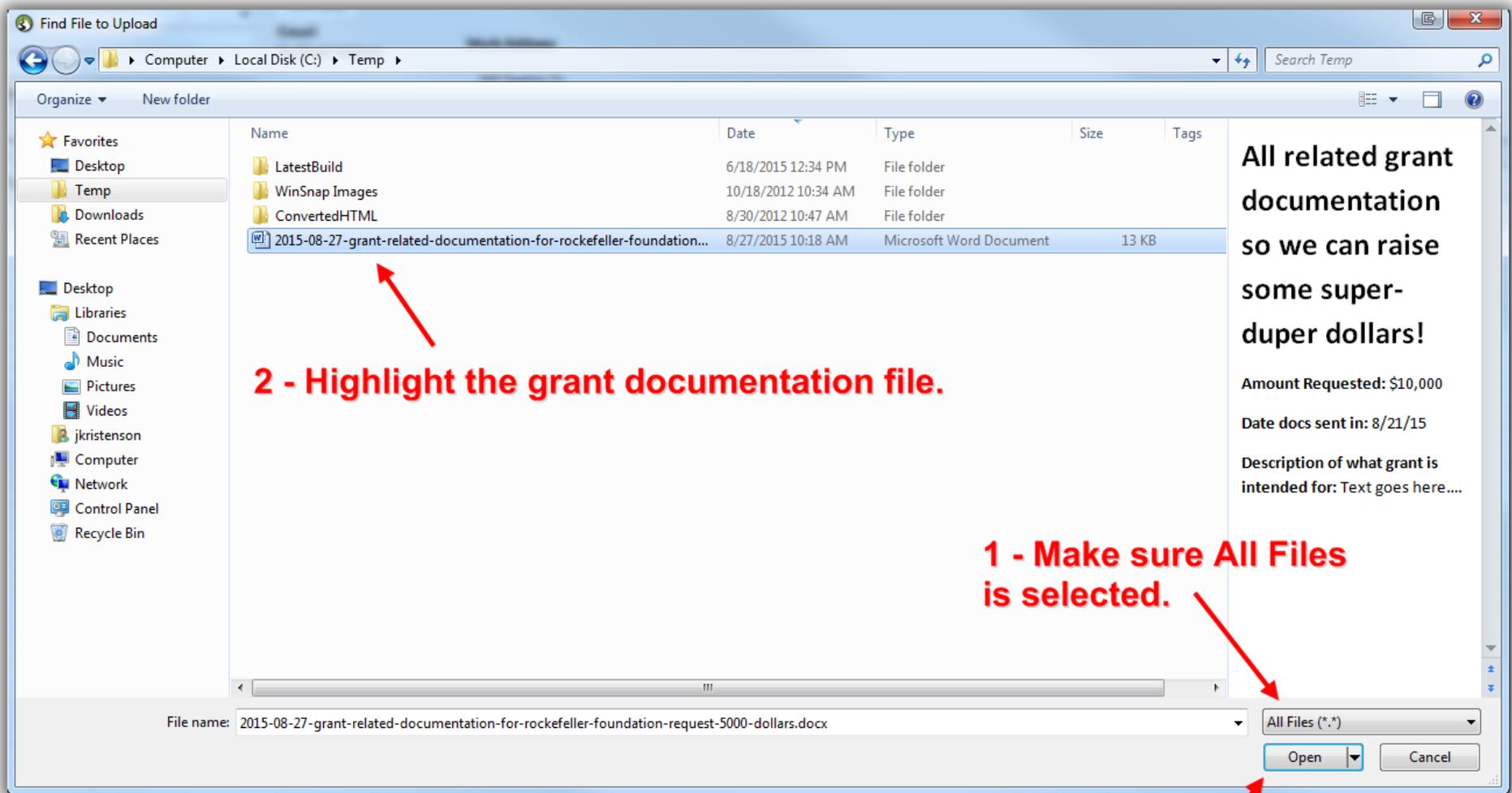


The screenshot shows the TrailBlazer interface for the 'Rockefeller Foundation' record. The 'Import File' button is highlighted with a red arrow. A tooltip for the 'Import File' button reads: 'Import a document, image, audio or video file.' The interface includes fields for contact information, a photo placeholder, and address fields.

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]**.

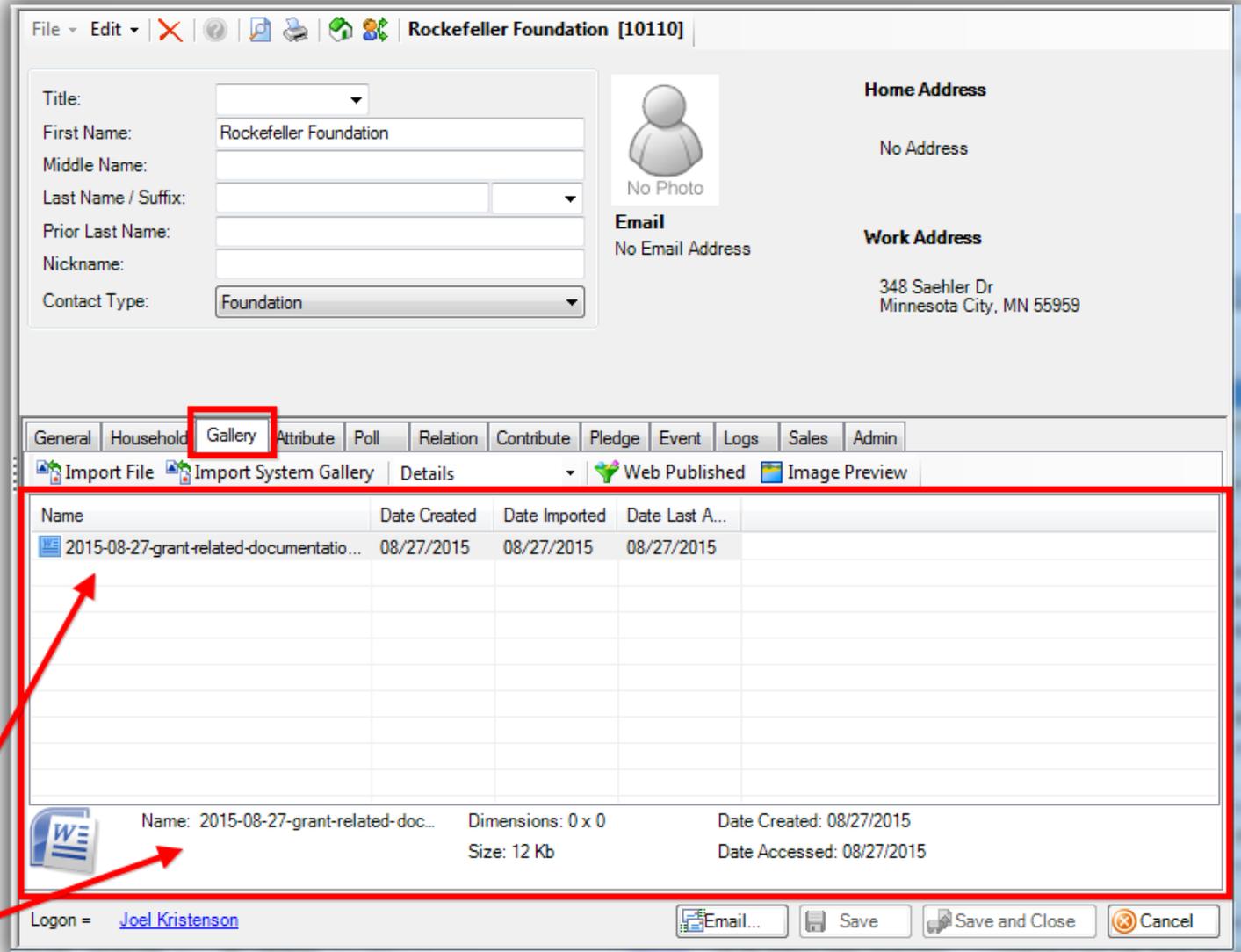
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Once the file(s) is uploaded it will display with details in the **Gallery**. It can be viewed by other users with appropriate security access and can be exported if need be. *My example Word Document is below.*

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The screenshot shows the TrailBlazer interface for the 'Rockefeller Foundation [10110]'. The top section contains contact information fields: Title, First Name (Rockefeller Foundation), Middle Name, Last Name / Suffix, Prior Last Name, Nickname, and Contact Type (Foundation). It also shows a 'No Photo' icon, 'No Email Address', and addresses for Home and Work. Below this is a tabbed interface with 'Gallery' selected. The gallery table has columns for Name, Date Created, Date Imported, and Date Last A... The table contains one entry: '2015-08-27-grant-related-documentation...' with dates of 08/27/2015. Below the table is a details pane for the selected document, showing a Word icon, Name, Dimensions (0 x 0), Size (12 Kb), Date Created (08/27/2015), and Date Accessed (08/27/2015). The bottom of the window shows a logon name 'Joel Kristenson' and buttons for Email, Save, Save and Close, and Cancel.

Name	Date Created	Date Imported	Date Last A...
2015-08-27-grant-related-documentation...	08/27/2015	08/27/2015	08/27/2015

Name: 2015-08-27-grant-related-doc... Dimensions: 0 x 0
Size: 12 Kb Date Created: 08/27/2015
Date Accessed: 08/27/2015

**Details related to the
stored document.**

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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 screenshot shows the TrailBlazer application interface. On the left is the 'Application Menu' with a tree view of tasks including 'Logs', 'Search Log Entries', and 'Reminders'. The main window is titled 'Log Entries' and contains search filters: 'Date Range' (set to '<custom, according to dates below>'), 'Log Type' (set to 'Grant Requested'), and 'Created By' (set to '<ignore>'). A red arrow labeled '2' points to the 'Log Type' dropdown. Below the search filters is a table of results. A red arrow labeled '1' points to the 'Search Log Entries' menu item. The table has columns: 'Incl', 'ID', 'Contact ID', 'First Name', 'Created', 'Text', 'By', '\$ or Hours', and 'Type'. Three records are shown, all with 'Grant Requested' type. A red box highlights the table, and a red arrow points to the '3' in the bottom-left corner of the table, indicating the total number of records. Another red arrow points to the '18,500.00' value in the bottom-right corner of the table, indicating the total dollar amount.

Incl	ID	Contact ID	First Name	Created	Text	By	\$ or Hours	Type
<input checked="" type="checkbox"/>	17179	10102	Andrew W. Mellon Foundation	6/14/2014 11:20 AM	Paper work sent in, see the Gallery tab for details and related docu...	Joel Kristenson	3,500.00	Grant Requested
<input checked="" type="checkbox"/>	17180	10086	Bill & Melinda Gates Foundation	4/27/2015 11:21 AM	Documentation sent in via email, no related documentation in Trail B...	Joel Kristenson	10,000.00	Grant Requested
<input checked="" type="checkbox"/>	17178	10110	Rockefeller Foundation	8/21/2015 2:33 PM	All required paperwork was sent in via USPS. See the Gallery for rel...	Joel Kristenson	5,000.00	Grant Requested
							18,500.00	

Current list of all 'Grant Requests' with related details.

Total dollar amount.

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

- Date Range
- Created By
- Other Log Types

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- 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:

Under the Contact (Voter/Donor) tab you can select a specific contact to filter by such as a single foundation.

Filter by a specific date range.

Select different log note types to search by or select multiple types at the same time.

The screenshot shows the TrailBlazer application interface. At the top, there are tabs for 'Search', 'Reset', 'New', 'Log Entries', 'Favorites', 'Logs', 'Contact', and 'SQL'. The 'Contact' tab is active. Below the tabs, there are search filters: 'Date Range' set to 'This month' (8/1/2015 to 8/31/2015), 'Log Type' set to 'Grant Requested', and 'Created By' set to 'Joel Kristenson'. A 'Text' search box is also present. A 'Select Log Types' dialog box is open, showing a list of log types with checkboxes: 'Combine Comment', 'Contact Passed Away', 'Data Export', 'Email Broadcast', 'Grant Approved', 'Grant Denied' (checked), 'Grant Pending', 'Grant Requested' (checked), 'Incoming Email', 'Meeting', and 'Meeting - On Site'. The 'Log Entries' list at the bottom shows one record found:

Incl	ID	Contact ID	First Name	Created	Text	By	\$ or Hours	Type
<input checked="" type="checkbox"/>	17178	10110	Rockefeller Foundation	8/21/2015 2:33 PM	All required paperwork was sent in via USPS. See the Gallery for rel...	Joel Kristenson	5,000.00	Grant Requested
1							5,000.00	

Enter log note text to search by.

Search by the user who recorded the log note.

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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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1 Search Log Entries

2 Log Type: <multiple items selected>

3 Select Log Types dialog box showing selected items: Grant Approved, Grant Denied, Grant Requested.

4 Search button

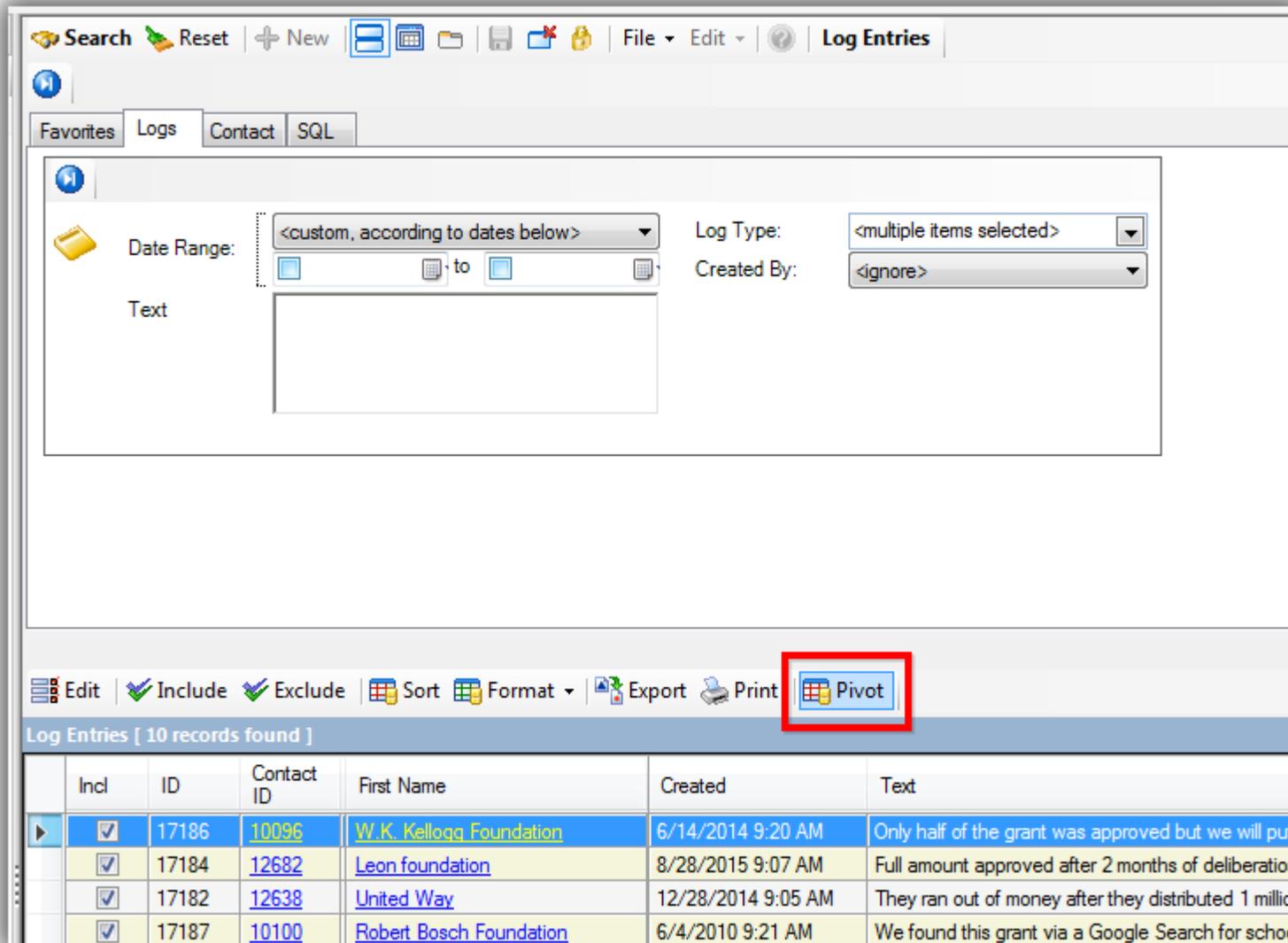
Total record count of all requested, approved, and denied grants.

Incl	ID	Contact ID	First Name	Created	Text	By	\$ or Hours	Type
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	17180	10086	Bill & Melinda Gates Foundation	4/27/2015 11:21 AM	Documentation sent in via email, no related documentation in T...	Joel Kristenson	10,000.00	Grant Requested
<input checked="" type="checkbox"/>	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



The screenshot shows the TrailBlazer interface with the following elements:

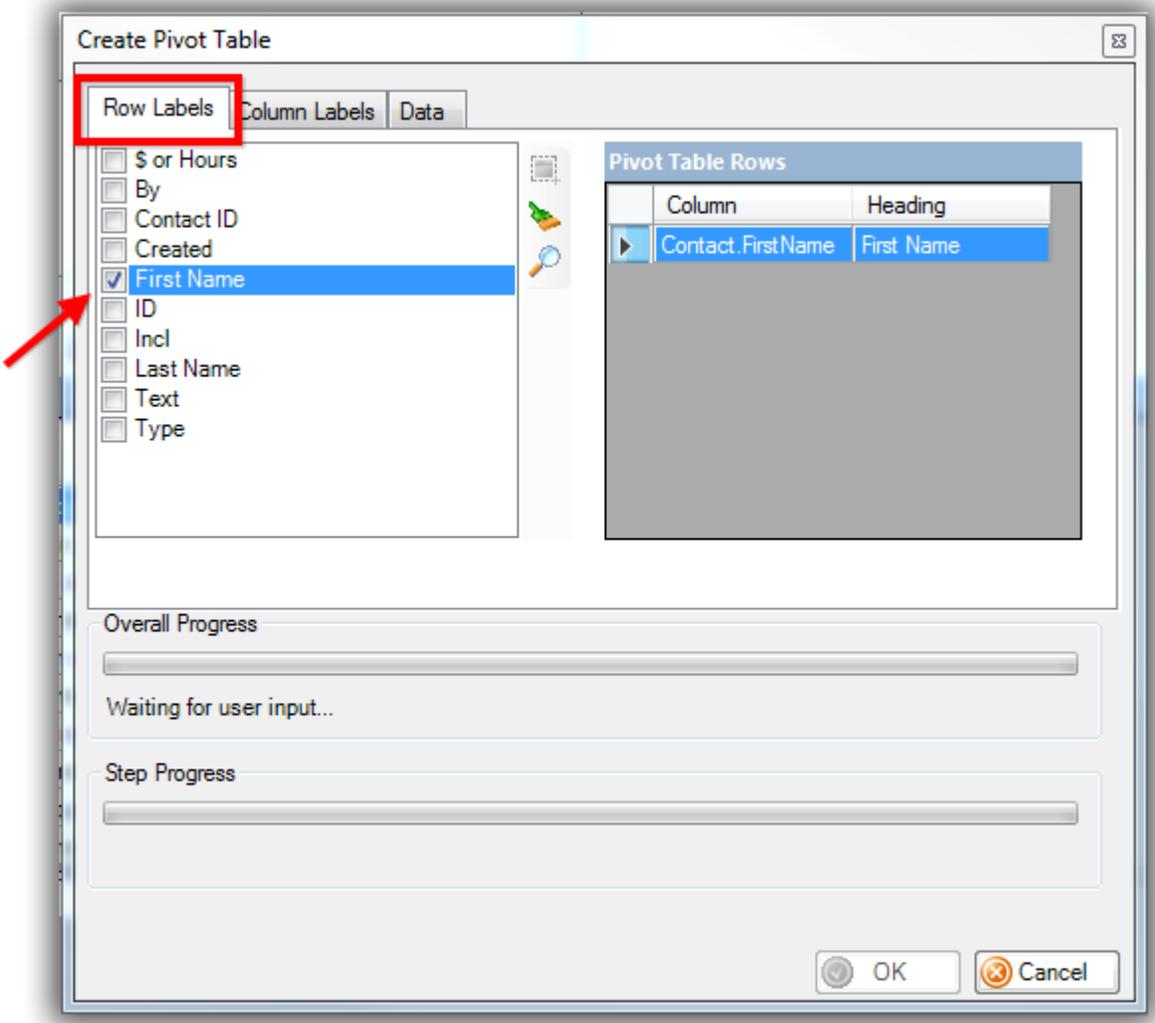
- Toolbar:** Search, Reset, New, File, Edit, Log Entries.
- Navigation:** Favorites, Logs, Contact, SQL.
- Filters:**
 - Date Range: <custom, according to dates below>
 - Log Type: <multiple items selected>
 - Created By: <ignore>
- Text Area:** A large empty text box for notes.
- Toolbar (Bottom):** Edit, Include, Exclude, Sort, Format, Export, Print, and **Pivot** (highlighted with a red box).
- Table:** Log Entries [10 records found]

Incl	ID	Contact ID	First Name	Created	Text
<input checked="" type="checkbox"/>	17186	10096	W.K. Kellogg Foundation	6/14/2014 9:20 AM	Only half of the grant was approved but we will put
<input checked="" type="checkbox"/>	17184	12682	Leon foundation	8/28/2015 9:07 AM	Full amount approved after 2 months of deliberation
<input checked="" type="checkbox"/>	17182	12638	United Way	12/28/2014 9:05 AM	They ran out of money after they distributed 1 million
<input checked="" type="checkbox"/>	17187	10100	Robert Bosch Foundation	6/4/2010 9:21 AM	We found this grant via a Google Search for school

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**.

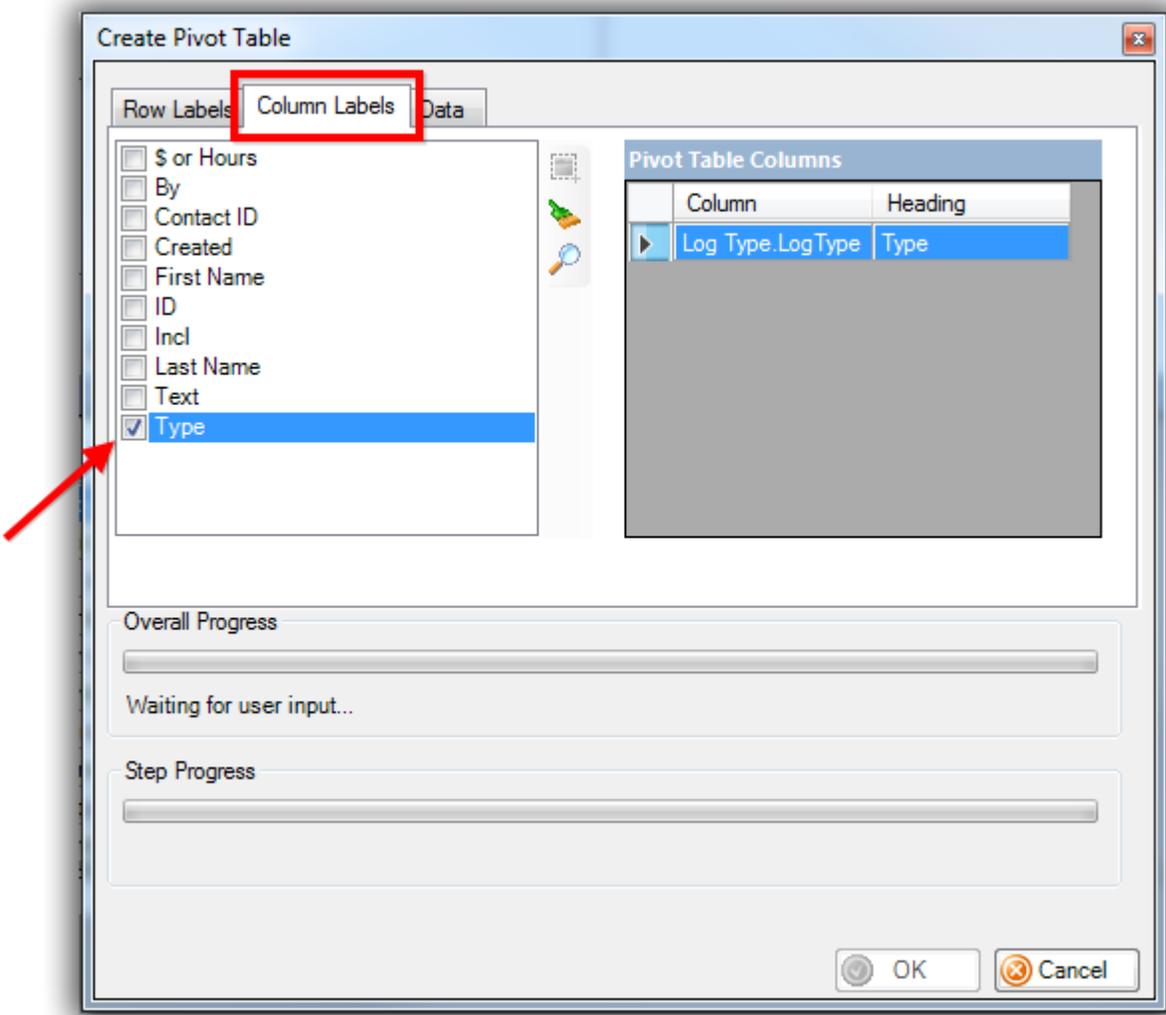
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Tracking Grants in Trail Blazer – Requested, Denied, Approved, And How to Build a Pivot Summary Report for Totals

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

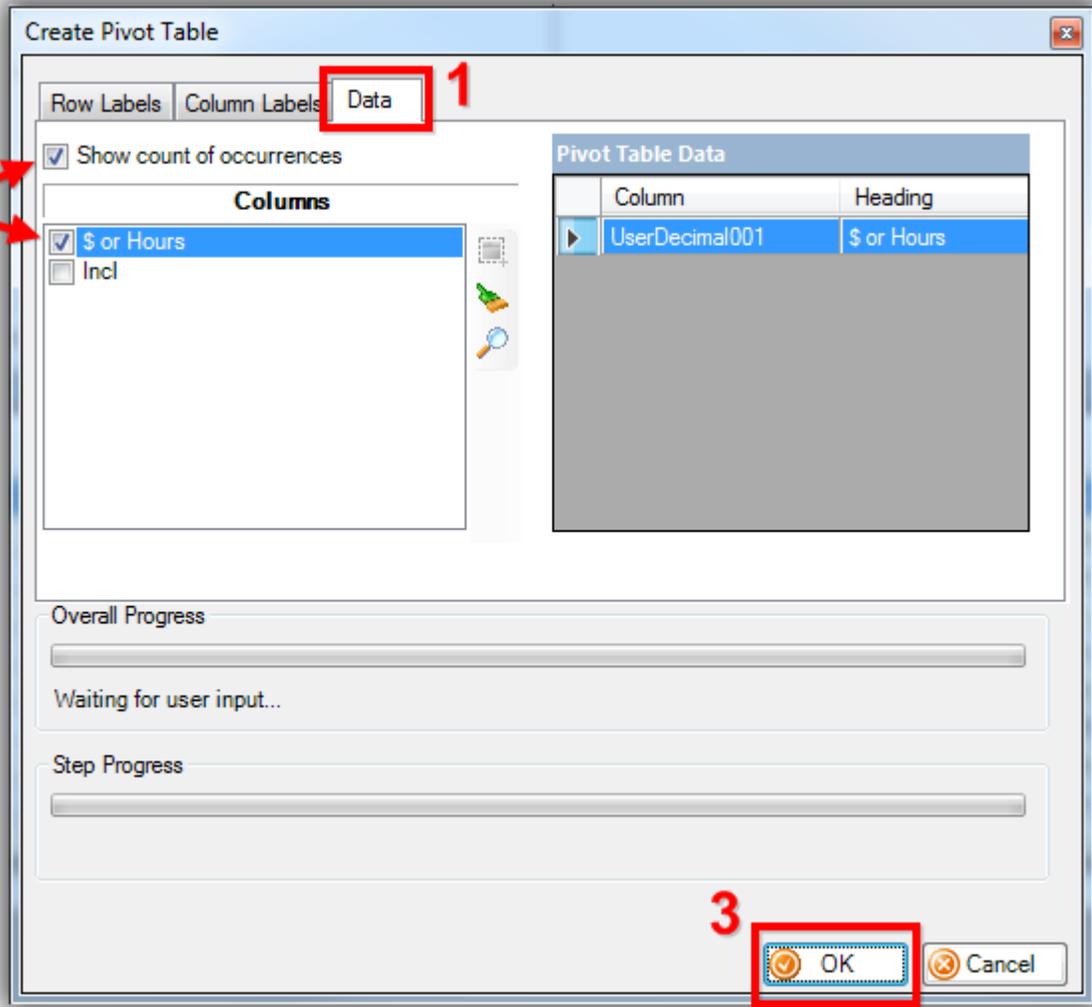
Tracking Grants in Trail Blazer – Requested, Denied, Approved, And How to Build a Pivot Summary Report for Totals



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



1

2

3

Column	Heading
UserDecimal001	\$ or Hours

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

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.

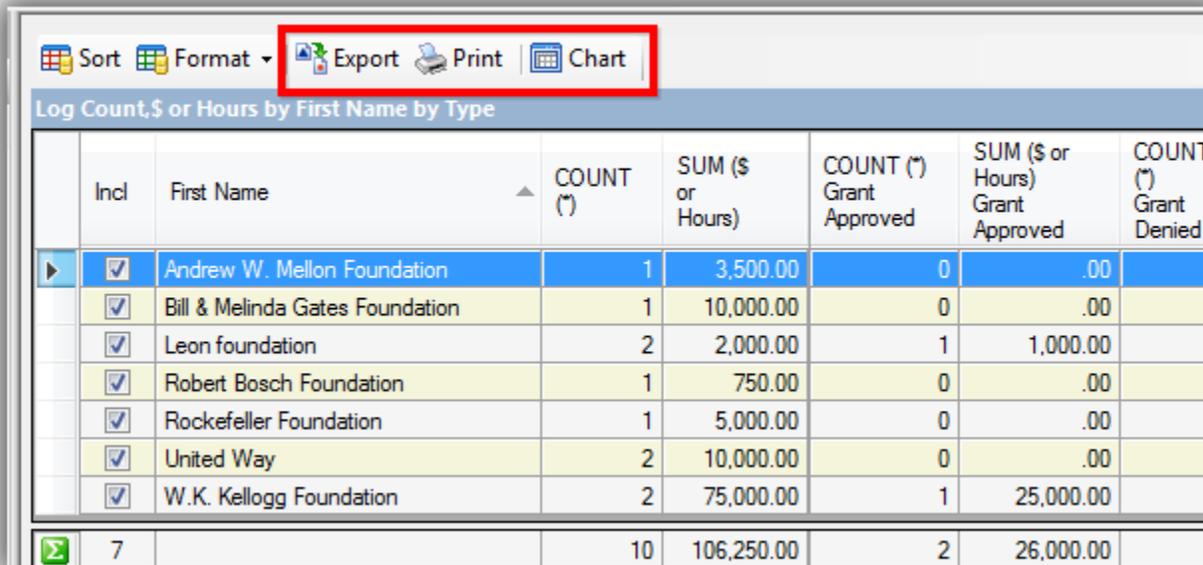
Log Count,\$ or Hours by First Name by Type										
Incl	First Name	COUNT (*)	SUM (\$ or Hours)	COUNT (*) Grant Approved	SUM (\$ or Hours) Grant Approved	COUNT (*) Grant Denied	SUM (\$ or Hours) Grant Denied	COUNT (*) Grant Requested	SUM (\$ or Hours) Grant Requested	
<input checked="" type="checkbox"/>	Andrew W. Mellon Foundation	1	3,500.00	0	.00	0	.00	1	3,500.00	
<input checked="" type="checkbox"/>	Bill & Melinda Gates Foundation	1	10,000.00	0	.00	0	.00	1	10,000.00	
<input checked="" type="checkbox"/>	Leon foundation	2	2,000.00	1	1,000.00	0	.00	1	1,000.00	
<input checked="" type="checkbox"/>	Robert Bosch Foundation	1	750.00	0	.00	0	.00	1	750.00	
<input checked="" type="checkbox"/>	Rockefeller Foundation	1	5,000.00	0	.00	0	.00	1	5,000.00	
<input checked="" type="checkbox"/>	United Way	2	10,000.00	0	.00	1	5,000.00	1	5,000.00	
<input checked="" type="checkbox"/>	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



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
<input checked="" type="checkbox"/>	Andrew W. Mellon Foundation	1	3,500.00	0	.00	
<input checked="" type="checkbox"/>	Bill & Melinda Gates Foundation	1	10,000.00	0	.00	
<input checked="" type="checkbox"/>	Leon foundation	2	2,000.00	1	1,000.00	
<input checked="" type="checkbox"/>	Robert Bosch Foundation	1	750.00	0	.00	
<input checked="" type="checkbox"/>	Rockefeller Foundation	1	5,000.00	0	.00	
<input checked="" type="checkbox"/>	United Way	2	10,000.00	0	.00	
<input checked="" type="checkbox"/>	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.



Trail Blazer™

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

#4 Related Resources

Article: [Adding Log Types](#)

Article: [Adding Log Notes, Mass Log Notes, & Reminders](#)

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

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.*

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** This service is included in your contract.*