

Author: Joel Kristenson Last Updated: 2016-01-28

Overview

This article shows how to set your **previous**, **current**, and **next Cycle** or **Fiscal** year in your **Trail Blazer** database. It also shows how to **add new** cycle/fiscal years *if you need to*, and how to **mass update** a list of donations to a specific cycle/fiscal year en masse.

This article is for nonprofit customers, if you're a working with a *political campaign* you'll want to follow these steps.

IMPORTANT: You must have **administrative** <u>security clearance</u> to your database in order to accomplish these tasks.



Outline

#1 Check your Current Cycles/Fiscal Years and Create New Ones
#2 Set your Previous, Default, and Next Cycle/Fiscal Year in your Organization Record
#3 Mass Update Donations to a Specific Cycle/Fiscal Year En Masse
#4 Related Resources

#1 – Check your Current Cycles/Fiscal Years and Create New Ones

Navigate to System Manager > Lists > Cycles > Click [Search]

This will populate all of your current cycles/fiscal years. In my example I had 28.



3





If you need to add a new cycle, click on the [+ New] button on the search tool strip. If you don't need to, you can continue to section #2.



If your current and/or next cycle/fiscal year doesn't exist click on the [+ New] button to begin adding new ones.

🔇 Settings Help			X			
Application Menu «	🦘 Search	n 🍬 Re	eset 🛛 🕂 New 📃 🗐	👝 🔒 📥	👸 File 👻 E	dit - 🛛 🕜 🕇 Cycle
e e G Ø	0					
Tasks	Favorites	SQL	Create ne	w record.		
		0012				
E Calendar/Tasks						
E Canvassing			Fav	orite Searche	5	
	💙 i					
Hinancial						>
System Manager						\sim
System Gallery						
						TF.
	V Include	e 🎸 Đ	clude 🛛 🌐 Sort 🖽 Forr	nat 👻 🔤 🖹 Ex	port 🚴 Print	🖽 Pivot
Expenditure Categories	Oucle I 26 r	acorde f	iound 1			
	Cycle [20 I		ouna j			
Contact Salutation Types	Incl	ID	CycleDescription	Start Date	End Date	
FEC Expenditure Categories		1	Calendar Year 2012	1/1/2012	12/31/2012	
		4	Calendar Year 1990	1/1/1990	12/31/1990	
: : Vi=Linternal Import Columna		-				



In my example I added a new one for Calendar Year 2016 (1/1/2016 – 1/1/2016). Put in the name, date, and save-and-close.

	1. Enter	the name.	
	Create New Cycle C File - Edit - X Cycle:	Card 🖂 🖂 Calendar Year 2016	
	General Cycle Info Cycle Start Date: End Date:	 ✓ 1/ 1/2016 ✓ ✓ 12/31/2016 	
2. Enter the date for the fiscal ye	e range ar or	Save Save and Close Cancel	se.



Click [Search] to refresh the list and the new record will display.







Make sure you add one for the 'next' cycle/fiscal year as well, and then move onto the next section which shows how to set these in your Organization record card.

#2 – Set your Previous, Default, and Next Cycle/Fiscal Year in your Organization Record

Navigate to **System Manger** > **Lists** > **Organization** > Click on your organization record to open it. *In my example it was called "Demo Nonprofit Joel".*





10



Navigate to the **Dates and Cycles** tab, adjust the **Current, Previous,** and **Next** cycles, then click **[Save and Close]**. In my example I used these settings (Current = 2016, Previous = 2015, and Next = 2017).



Set your Current,	File - Edit - @ Organization Inform Name: Address: : City: State: Zip Code:	ation Display he 620 Men Suite 180 Golden MN 55427	Ip information. Indelssohn Avenue North 6 Valley	Organization Contin Phone: Fax: <u>Web Site</u> <u>Alt Web Site</u> <u>E-Mail</u> Date Organized: Bank Account:	nued (866) 909-8700 () - http://www.trailblz.info/demononprofitjoel https://www.trailblz.info/demononprofitjoel/dc jkristenson@trailblz.com 9/29/2014 Parent Non Profit Bank
Previous, and Next cycles.	Email Representi Current Cycle Current Cycle Previous and Next Complete even if y or don't plan on ru Previous Cycle Next Cycle	ng/Active in Cycles you did not r nning in the	Related Committee(s) Disclosure Settings Calendar Year 2016 run in the past future. Calendar Year 2015 Calendar Year 2017	Dates and Cycles Complete if Date Rainer Complete if Date Rainer On Cycle dates Begin Date: End Date: Time Zone Settings - Time Zone:	Settings or special use nge Value value is not based Image: 1/1/1990 Image: 1/1990 I



When you <u>manually enter</u> your next donation it will default the cycle to whatever you set as your 'Current Cycle' in your Organization record. *In my* example it was Calendar Year 2016 as shown in the image below. For online donations coming in through your **Trail Blazer** <u>iFrame form</u>, they'll also be set to the 'current' cycle.



F	File - Ed	it + <mark>></mark>	(@ 🖻	28 🗞 ا 😓	Joel Kristenson	[12796]						1
	Title: First Nan Middle N Last Nan	ne ame ne/Suffix	Mr. Joel Kristenss	▼ on				Home Ad 9110 Go Apt 10 Golden 218-442	dress Iden Valley Rd Valley, MN 55427 -1919		Л	
l	Prior Las Nicknam	t Name e			J		File - Edit - >	< @				
	Contact 1	Гуре:	Individu	ial			Joel Kristenson 9110 Golden Va Apt 10	alley Rd	Amount: Less Refunds:	.00 .00		
	General	Househo 🙆 Re	ld Gallery A fresh 🎸 Inc	ttribute Poll clude 😻 Exc	Relation Contril	Format	Golden Valley,	MN, 55427	Net Amount:	.00		
	Incl	Open	Date	Amount After Refunds	Cycle	Event	Event:	Allocate Match M	1emory/Honor Notify Oth	er Payment	emorial/ inorarium rson	
		<u>Op</u> <u>Op</u>	11/12/2015 10/8/2015	500.00 145.00	Calendar Year Calendar Year		Cycle:	Calendar Year 201	6	•		
		<u>Op</u>	9/18/2015 9/15/2015	80.00 123.00	Calendar Year Calendar Year		Date Received: Type:	1/27/2016 Check				
		<u>Op</u> <u>Op</u>	8/5/2015 6/19/2015	5,000.00 145.00	Calendar Year Calendar Year	<u>2011 - /</u>	Recurrence: Check Number	Single	•			Your cycle will not default
		<u>Op</u> <u>Op</u>	5/14/2015 1/29/2015 1/26/2015	50.00 25,000.00 2,565.00	Calendar Year Calendar Year Calendar Year	Blazing	Amount: Memo:	.00 Ta	x Deduct Amt: .00			to whatever you set as the
		<u>Op</u> <u>Op</u>	10/27/2014 10/22/2014 10/7/2014	100.00 500.00 1,750.25	Calendar Year Calendar Year Calendar Year						t	Current' cycle in your Organization Record.
		<u>Op</u> <u>Op</u>	10/7/2014 10/6/2014	50.00 10,000.00	Calendar Year Calendar Year						t If	
		<u>Op</u> <u>Op</u>	10/6/2014 10/6/2014 10/6/2014	123.45 1,234.56	Calendar Year Calendar Year			Sav	re Save and Close	Cancel	t reat person	1



You'll need to repeat these steps every year. The next section shows how to mass update donation records to a specific cycle en masse if they aren't set correctly.

#3 Set Contributions to an Election En Mass

Navigate to **Contributions** list by following **Application Menu > Donor (***Contacts***) > Contributions/Pledges > Contributions**.







Search by the date range for your Fiscal or Calendar Year. In my example I searched for the calendar year 2015 (1/1/15 – 12/31/15) which provided **3,833** donation records. If your list of donations is over 1,000 make sure that you load 'all', if it's less than 1k it will auto-populate the grid.



Image: state	Date Range Cycle:	E Last year	Other Ga	steway Contact	SQL								_		
•	Date Range Cycle:	E Last year	r												
•	Date Range Cycle:	E Last yea	r												
	Date Range Cycle:	: 🔽 1/1				ucts:	<ignore></ignore>	•	•						
	Cycle:		1/2015 👻	< > 🔽 12/31/20	15 🗸 Recu	irrence:	<ignore></ignore>	-	ĩ						
		 <ianore< td=""><td>></td><td></td><td>Dedu</td><td>uctibility:</td><td><ianore></ianore></td><td>•</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></ianore<>	>		Dedu	uctibility:	<ianore></ianore>	•							
	Event:	< ignore	>		Excl	ude Ever	t: <ignore></ignore>	•							
	Amount Bar	mae: minimum	n -	to maximum		Fund	<ignore></ignore>		1						
	Pateb Code		•			. r unu.	signores								
	Daten Code														
tributio	ons [3833 r	ecords found]													
inci	ID	Date	Contact ID	Last Name	First Name	мі	Amount	Applied Against	Open Pledges [Per	Deposited	Thank You Letter	Thank You	Thank You Call	Check #	Street
inci	ID	Date	Contact ID	Last Name	First Name	мі	Amount	Applied Against Pledges	Open Pledges [Per Contact]	Deposited	Thank You Letter Sent	Thank You Date	Thank You Call Done	Check #	Street
	ID <u>46487</u>	Date 11/23/2015	Contact ID 14780	Last Name	First Name	мі	Amount 175.00	Applied Against Pledges .00	Open Pledges [Per Contact]	Deposited	Thank You Letter Sent	Thank You Date	Thank You Call Done	Check #	Street
	ID 46487 46486	Date 11/23/2015 11/23/2015	Contact ID 14780 5	Last Name Datole <u>Aakhus</u>	First Name Jazz <u>Steven</u>	MI Eric	Amount 175.00 50.00	Applied Against Pledges .00	Open Pledges [Per Contact] .00 .00	Deposited	Thank You Letter Sent	Thank You Date	Thank You Call Done	Check #	Street 1800 Baptist World Cer 19981 See Gull Rd
	ID 46487 46486 46485 46485	Date 11/23/2015 11/23/2015 11/23/2015 11/20/2015	Contact ID 14780 5 14779	Last Name Daigle Aakhus Wagner Cond	First Name Jazz Steven Anthony	MI Eric	Amount 175.00 50.00 15.00	Applied Against Pledges .00 .00	Open Pledges [Per Contact] .00 .00	Deposited	Thank You Letter Sent	Thank You Date	Thank You Call Done	Check #	Street 1800 Baptist World Cer 19981 See Gull Rd 10101 Fondren Rd
	ID 46487 46486 46485 46484 46483	Date 11/23/2015 11/23/2015 11/23/2015 11/20/2015 11/20/2015	Contact ID 14780 5 14779 14778 14778	Last Name Daigle Aakhus Wagner Caryl Caryl	First Name Jazz Steven Anthony Alysia	MI Eric	Amount 175.00 50.00 15.00 50.00 145.00	Applied Against Pledges .00 .00 .00	Open Pledges [Per Contact] .00 .00 .00 .00	Deposited	Thank You Letter Sent	Thank You Date	Thank You Call Done	Check # N/A N/A N/A	Street 1800 Baptist World Cer 19981 See Gull Rd 10101 Fondren Rd 390 Ashton Ave
	ID 46487 46486 46485 46484 46483 46483	Date 11/23/2015 11/23/2015 11/20/2015 11/20/2015 11/20/2015	Contact ID 147780 5 14779 14778 14778 14777	Last Name Daigte Aakhus Wagner Caryl Caryl Unknown	First Name Jazz Steven Anthony Alysia Abigail	MI Eric	Amount 175.00 50.00 15.00 50.00 145.00 175.43	Applied Against Pledges .00 .00 .00 .00	Open Pledges [Per Contact] .00 .00 .00 .00	Deposited	Thank You Letter Sent V	Thank You Date	Thank You Call Done	Check #	Street 1800 Baptist World Cer 19981 See Gull Rd 10101 Fondren Rd 390 Ashton Ave 390 Ashton Ave 133 Main St
	ID 46487 46486 46485 46483 46483 46483 46482 46481	Date 11/23/2015 11/23/2015 11/23/2015 11/20/2015 11/20/2015 11/20/2015 11/9/2015	Contact ID 14789 5 14779 14778 14778 14777 14776	Last Name Daigle <u>Aakhus</u> <u>Wagner</u> <u>Caryl</u> <u>Caryl</u> <u>Unknown</u> Jones	First Name Jazz Steven Anthony Alysia Alysia Abigail Hillary	MI Eric	Amount 175.00 50.00 15.00 50.00 145.00 175.43 50.00	Applied Against Pledges 00 00 00 00 00 00 00 00 00	Open Pledges [Per Contact] .00 .00 .00 .00 .00 .00	Deposited	Thank You Letter Sent V V V V	Thank You Date	Thank You Call Done	Check # Check # N/A N/A 1234	Street 1800 Baptist World Cer 19981 See Gull Rd 10101 Fondren Rd 390 Ashton Ave 390 Ashton Ave 123 Main St 620 Mendelssohn Ave
	ID 46487 46486 46485 46483 46483 46482 46481 46481 46480	Date 11/23/2015 11/23/2015 11/23/2015 11/20/2015 11/20/2015 11/20/2015 11/19/2015 11/18/2015	Contact ID 14780 5 14779 14778 14778 14777 14776 14775	Last Name Daiole <u>Aakhus</u> <u>Wagner</u> <u>Caryl</u> <u>Caryl</u> <u>Unknown</u> <u>Jones</u> Wheelock	First Name Jazz Steven Anthony Alysia Alysia Abigail Hillary Alex	MI Eric	Amount 175.00 50.00 15.00 50.00 145.00 175.43 50.00 1.000.00	Applied Against Pledges 00 00 00 00 00 00 00 00 00 00 00	Open Pledges (Per Contact) 00 00 00 00 00 00 00 00 00 00 00 00	Deposited	Thank You Letter Sent V V V V V V V V V V V V V V V V V V V	Thank You Date	Thank You Call Done	Check # Check # N/A N/A 1234	Street 1800 Baptist World Cer 19981 See Gull Rd 10101 Fondren Rd 390 Ashton Ave 390 Ashton Ave 123 Main St 620 Mendelssohn Ave 1705 Highway 59
	ID 46487 46486 46485 46483 46483 46482 46481 46480 5602	Date 11/23/2015 11/23/2015 11/23/2015 11/20/2015 11/20/2015 11/19/2015 11/18/2015 11/18/2015 11/12/2015	Contact ID 5 14779 14778 14778 14777 14776 14775 12796	Last Name Daigle Aakhus Wagner Caryl Caryl Unknown Jones Wheelock Kristenson	First Name Steven Anthony Alysia Alysia Abigail Hillary Alex Joel	MI Eric	Amount 175.00 50.00 15.00 50.00 145.00 175.43 50.00 1,000.00	Applied Against Pledges 00 00 00 00 00 00 00 00 00 00 00 00 00	Open Pledges (Per Contact) 00 00 00 00 00 00 00 00 00 00 00 00 00	Deposited	Thank You Letter Sent V V V V V V V V V V V V V V V V V V V	Thank You Date	Thank You Call Done	Check # Check # N/A N/A 1234	Street 1800 Baptist World Cer 19981 See Gull Rd 10101 Fondren Rd 390 Ashton Ave 390 Ashton Ave 123 Main St 620 Mendelssohn Ave 1705 Highway 59 9110 Golden Valley Rd
	ID 46487 46486 46485 46483 46483 46483 46482 46481 46480 5602 46479	Date 11/23/2015 11/23/2015 11/23/2015 11/20/2015 11/20/2015 11/20/2015 11/19/2015 11/18/2015 11/12/2015	Contact ID 5 14779 14778 14778 14778 14777 14776 14775 12796 14774	Last Name Daigle Aakhus Wagner Caryl Caryl Unknown Jones Wheelock Kristenson Ferguson	First Name Steven Anthony Alysia Alysia Abigail Hillary Alex Joel Ashley	MI Eric	Amount 175.00 50.00 15.00 50.00 145.00 175.43 50.00 1,000.00 500.00 147.55	Applied Against Pledges 00 00 00 00 00 00 00 00 00 00 00 00 00	Open Pledges (Per Contact) 00 00 00 00 00 00 00 00 00 00 00 00 00	Deposited	Thank You Letter Sent	Thank You Date	Thank You Call Done	Check # Check # N/A N/A 1234	Street 1800 Baptist World Cer 19981 See Gull Rd 10101 Fondren Rd 390 Ashton Ave 390 Ashton Ave 123 Main St 620 Mendelssohn Ave 1705 Highway 59 9110 Golden Valley Rd 1701 Shackleford Rd S
	ID 46486 46486 46485 46483 46483 46483 46482 46481 46480 5602 46479 46478	Date 11/23/2015 11/23/2015 11/23/2015 11/20/2015 11/20/2015 11/19/2015 11/18/2015 11/12/2015 11/12/2015	Contact ID 5 14779 14778 14778 14778 14777 14776 14775 12796 14774 14773	Last Name Daigle Aakhus Wagner Caryl Caryl Unknown Jones Wheelock Kristenson Ferguson Caplan	First Name Steven Anthony Alysia Alysia Abigail Hillary Alex Joel Ashley Neil	MI Eric	Amount 175.00 50.00 15.00 50.00 145.00 175.43 50.00 1,000.00 500.00 147.55 145.00	Applied Against Pledges 00 00 00 00 00 00 00 00 00 00 00 00 00	Open Pledges (Per Contact) 00 00 00 00 00 00 00 00 00 00 00 00 00	Deposited	Thank You Letter Sent	Thank You Date	Thank You Call Done	Check # Check # N/A N/A 1234 1234	Street 1800 Baptist World Cer 19981 See Gull Rd 10101 Fondren Rd 390 Ashton Ave 390 Ashton Ave 123 Main St 620 Mendelssohn Ave 1705 Highway 59 9110 Golden Valley Rd 1701 Shackleford Rd S PO Box 843
	ID 46486 46485 46483 46483 46483 46483 46482 46481 46480 5602 46479 46478 46477	Date 11/23/2015 11/23/2015 11/23/2015 11/20/2015 11/20/2015 11/20/2015 11/19/2015 11/12/2015 11/12/2015 11/12/2015	Contact ID 14779 14778 14778 14778 14777 14776 14775 12796 14774 14773 14772	Last Name Daigle Aakhus Wagner Caryl Caryl Unknown Jones Wheelock Kristenson Ferguson Caplan Nelson	First Name Steven Anthony Alysia Alysia Abigail Hillary Alex Joel Ashley Neil Amber	MI Eric	Amount 175.00 50.00 15.00 50.00 145.00 175.43 50.00 1,000.00 500.00 147.55 145.00 123.56	Applied Against Pledges 00 00 00 00 00 00 00 00 00 00 00 00 00	Open Pledges (Per Contact) 00 00 00 00 00 00 00 00 00 00 00 00 00	Deposited	Thank You Letter Sent V V V V V V V V V V V V V V V V V V V	Thank You Date	Thank You Call Done	Check # Check # N/A N/A N/A 1 1234	Street 1800 Baptist World Cer 19981 See Gull Rd 10101 Fondren Rd 390 Ashton Ave 390 Ashton Ave 123 Main St 620 Mendelssohn Ave 1705 Highway 59 9110 Golden Valley Rd 1701 Shackleford Rd S PO Box 843 PO Box 85
	ID 46486 46485 46483 46483 46483 46483 46482 46483 46482 46480 5602 46479 46478 46477 46476	Date 11/23/2015 11/23/2015 11/23/2015 11/20/2015 11/20/2015 11/20/2015 11/19/2015 11/12/2015 11/12/2015 11/12/2015 11/12/2015	Contact ID 5 14779 14778 14778 14778 14777 14776 14775 12796 14774 14773 14772 14771	Last Name Daigle Aakhus Wagner Caryl Caryl Unknown Jones Wheelock Kristenson Ferguson Caplan Nelson Jones	First Name Steven Anthony Alysia Alysia Abigail Hillary Alex Joel Ashley Neil Amber Bob	MI Eric	Amount 175.00 50.00 15.00 50.00 145.00 175.43 50.00 1,000.00 500.00 147.55 145.00 123.56 50.00	Applied Against Pledges 00 00 00 00 00 00 00 00 00 00 00 00 00	Open Pledges (Per Contact) 00 00 00 00 00 00 00 00 00 00 00 00 00	Deposited	Thank You Letter Sent V V V V V V V V V V V V V V V V V V V	Thank You Date	Thank You Call Done Call Call Call Call Call Call Call Cal	Check # Check # N/A N/A N/A 1234 1234 N/A N/A	Street 1800 Baptist World Cer 19981 See Gull Rd 10101 Fondren Rd 390 Ashton Ave 390 Ashton Ave 123 Main St 620 Mendelssohn Ave 1705 Highway 59 9110 Golden Valley Rd 1701 Shackleford Rd S PO Box 843 PO Box 85
	ID 46486 46485 46484 46483 46483 46483 46482 46483 46482 46481 46480 5602 46479 46478 46477 46476 46475	Date 11/23/2015 11/23/2015 11/23/2015 11/20/2015 11/20/2015 11/20/2015 11/12/2015 11/12/2015 11/12/2015 11/12/2015 11/12/2015 11/12/2015	Contact ID 5 14779 14778 14778 14778 14777 14776 14775 12796 14774 14773 14772 14771 14771	Last Name Daigle Aakhus Wagner Caryl Caryl Unknown Jones Wheelock Kristenson Ferguson Caplan Nelson Jones Crum	First Name Steven Anthony Alysia Alysia Abigail Hillary Alex Joel Ashley Neil Amber Bob Caittyn	MI Eric	Amount 175.00 50.00 15.00 15.00 145.00 145.00 175.43 50.00 1,000.00 500.00 147.55 145.00 123.56 50.00 145.00	Applied Against Pledges 000 000 000 000 000 000 000 000 000 0	Open Pledges (Per Contact) 00 00 00 00 00 00 00 00 00 00 00 00 00	Deposited	Thank You Letter Sent V V V V V V V V V V V V V V V V V V V	Thank You Date	Thank You Call Done	Check # Check # N/A N/A N/A 1234 1234 1 N/A N/A	Street 1800 Baptist World Cer 19981 See Gull Rd 10101 Fondren Rd 390 Ashton Ave 390 Ashton Ave 123 Main St 620 Mendelssohn Ave 1705 Highway 59 9110 Golden Valley Rd 1701 Shackleford Rd S PO Box 843 PO Box 85 425 Sugar Maple Ln
	ID 40487 46486 46485 46483 46483 46483 46483 46482 46483 46482 46483 5602 46479 46478 46477 46476 46475 46474	Date 11/23/2015 11/23/2015 11/23/2015 11/20/2015 11/20/2015 11/20/2015 11/12/2015 11/12/2015 11/12/2015 11/12/2015 11/12/2015 11/12/2015 11/12/2015 11/11/2015	Contact ID 5 14779 14778 14778 14778 14777 14776 14775 12796 14774 14773 14772 14772 14771 14770 14769	Last Name Datate Aakhus Wagner Caryl Caryl Unknown Jones Wheelock Kristenson Ferquson Caplan Nelson Jones Crum Bauer	First Name Steven Anthony Alysia Alysia Alysia Abigail Hillary Alex Joel Ashley Neil Ashley Neil Amber Bob Caitlyn Danielle	MI Eric	Amount 175.00 50.00 15.00 50.00 145.00 175.43 50.00 1,000.00 500.00 147.55 145.00 123.56 50.00 145.00 123.56	Applied Against Pledges .00	Open Pledges [Per Contact] 000 000 000 000 000 000 000 000 000 0	Deposited	Thank You Letter Sent V V V V V V V V V V V V V V V V V V V	Thank You Date	Thank You Call Done Call Call Call Call Call Call Call Cal	Check # Check # N/A N/A N/A 1234 1234 N/A N/A N/A	Street 1800 Baptist World Cet 19981 See Gull Rd 10101 Fondren Rd 390 Ashton Ave 390 Ashton Ave 123 Main St 620 Mendelssohn Ave 1705 Highway 59 9110 Golden Valley Rd 1701 Shackleford Rd S PO Box 843 PO Box 85 425 Sugar Maple Ln



Click the File drop-down menu and select 'Update Cycle'.







Choose your 'cycle' from the drop-down list and click [OK]. I selected the Calendar Year 2015.



This will initiate the operation. Once it's complete you'll get a message with the results. Click **[OK]** to finish.



Number of donation records that were updated.



Repeat these steps if necessary for any of your fiscal/calendar years where donations may be keyed incorrectly to the wrong 'cycle'.

Once this is complete you should get the same results for a query if you search by the cycle **date-range** OR by the **cycle drop-down** menu. *In my example I get the same results searching by the Cycle 2015 as I did when running the query by date-range.*



9	🤝 Search 🔈 Reset 🕂 New 🔚 📾 🗁 🔚 💣 🤔 File 🗕 Edit - 🍘 Apply to Pledges Contributions											
Fa	avorites	General Memo	ny/Honor Other Gateway	Contact SQL								
1	0											
	Date Range:											
	Ť.,	Date Mange.	🔲 📑 <> 🔲		Recurrence:	<ignore></ignore>	-					
		Cycle:	Calendar Year 2015		Deductibility:	<ignore></ignore>	•					
		Event:	<ignore></ignore>		Exclude Event:	<ignore></ignore>	•					
		Amount Range:	minimum 🔻 to max	ximun 👻	Alloc. Fund:	<ignore></ignore>	•					
		Batch Code:										
		Resu 'date	Its should -range' or	be san from th	ne if yo ie cycl	ou sea e drop	rch by tl -down n	he cy nenu.	cle			
	Edit	🎸 Include 🛛 🖋	Exclude 🔠 Sort 🏢 Form	mat 👻 🖹 📲 Export	📚 Print 🛛 🌐 Pi	vot						
Cor	ntributi	ions [3833 record	is found]									
	Incl	ID Date	Contact ID Last	t Name	First Name		MI	Amount	Applied Against Pledges			



The related resources below link to many other useful articles and videos, if you need immediate assistance please call our live support line (1-866-909-8700 | 8 AM – 5 PM CT).



- YouTube Channel

- Knowledge Base Articles

- 3rd Party Resources



Related Resources

Article: Enter Contributions

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

Article: Contribution Year-End Report

Video: Getting Started 106a – Entering Contributions (NON PROFIT ONLY)

Video: Filter Using New Date Controls

Video: Filtered Contribution Columns in Format

Video: Election Cycles to Contributions Records (en masse) – Political Only

Trail Blazer Live Support



(C) Phone: 1-866-909-8700

Email: support@trailblz.com

- Facebook: https://www.facebook.com/pages/Trail-Blazer-Software/64872951180
- Twitter: <u>https://twitter.com/trailblazersoft</u>

* As a policy we require that you have taken our intro training class before calling or emailing our live support team.

<u>*Click here*</u> 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 <u>GoToMeeting</u> session where we host our live interactive trainings.

* This service <u>is</u> included in your contract.