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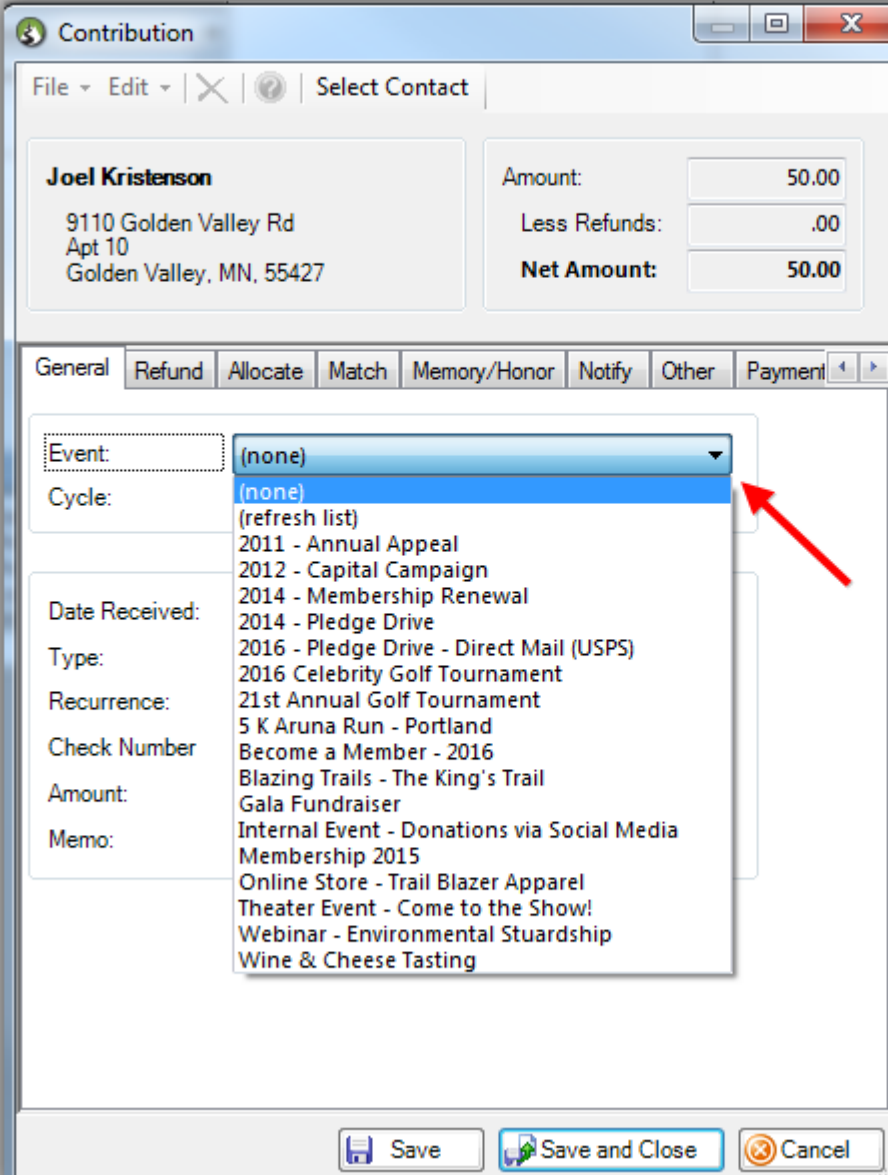
Overview

This article walks through the steps to add new 'Events' into the drop-down lists in your database such as the drop-down list that displays when entering contributions.

*In **Trail Blazer** the event system is used to track the **source** of a donation whether it's a physical fundraiser, direct mail, pledge drive, capital campaign, etc. In this example I create an event to track a mass mail appeal which is common to track how much money came in because of the mailing.*

 **Tip:** Events are used to track the **source** of a donation. [Allocation \(restricted\) funds](#) are used to track where the money is **going** i.e. General Fund, Scholarship Fund, etc. **Example** of a populated event drop-down list:

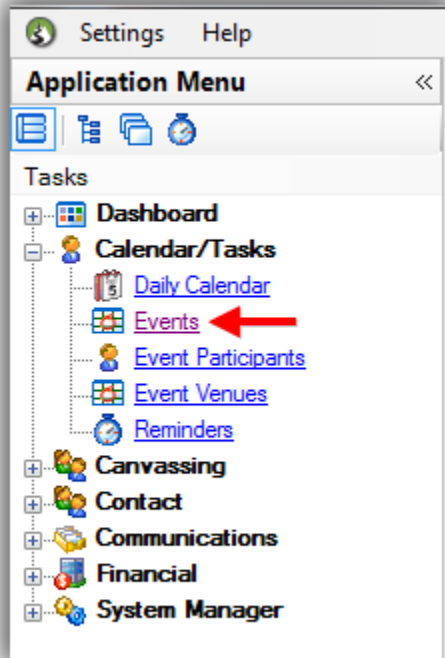
Example event drop-down list when entering a contribution.



The screenshot shows a software window titled "Contribution" with a menu bar (File, Edit, Select Contact) and a contact information section for Joel Kristenson. The contact details include the address: 9110 Golden Valley Rd, Apt 10, Golden Valley, MN, 55427. To the right, there are input fields for "Amount" (50.00), "Less Refunds" (.00), and "Net Amount" (50.00). Below this is a tabbed interface with tabs for General, Refund, Allocate, Match, Memory/Honor, Notify, Other, and Payment. The "Event:" field is active, and its dropdown menu is open, displaying a list of events including "(none)", "(refresh list)", "2011 - Annual Appeal", "2012 - Capital Campaign", "2014 - Membership Renewal", "2014 - Pledge Drive", "2016 - Pledge Drive - Direct Mail (USPS)", "2016 Celebrity Golf Tournament", "21st Annual Golf Tournament", "5 K Aruna Run - Portland", "Become a Member - 2016", "Blazing Trails - The King's Trail", "Gala Fundraiser", "Internal Event - Donations via Social Media", "Membership 2015", "Online Store - Trail Blazer Apparel", "Theater Event - Come to the Show!", "Webinar - Environmental Stewardship", and "Wine & Cheese Tasting". A red arrow points to the dropdown arrow of the "Event:" field.

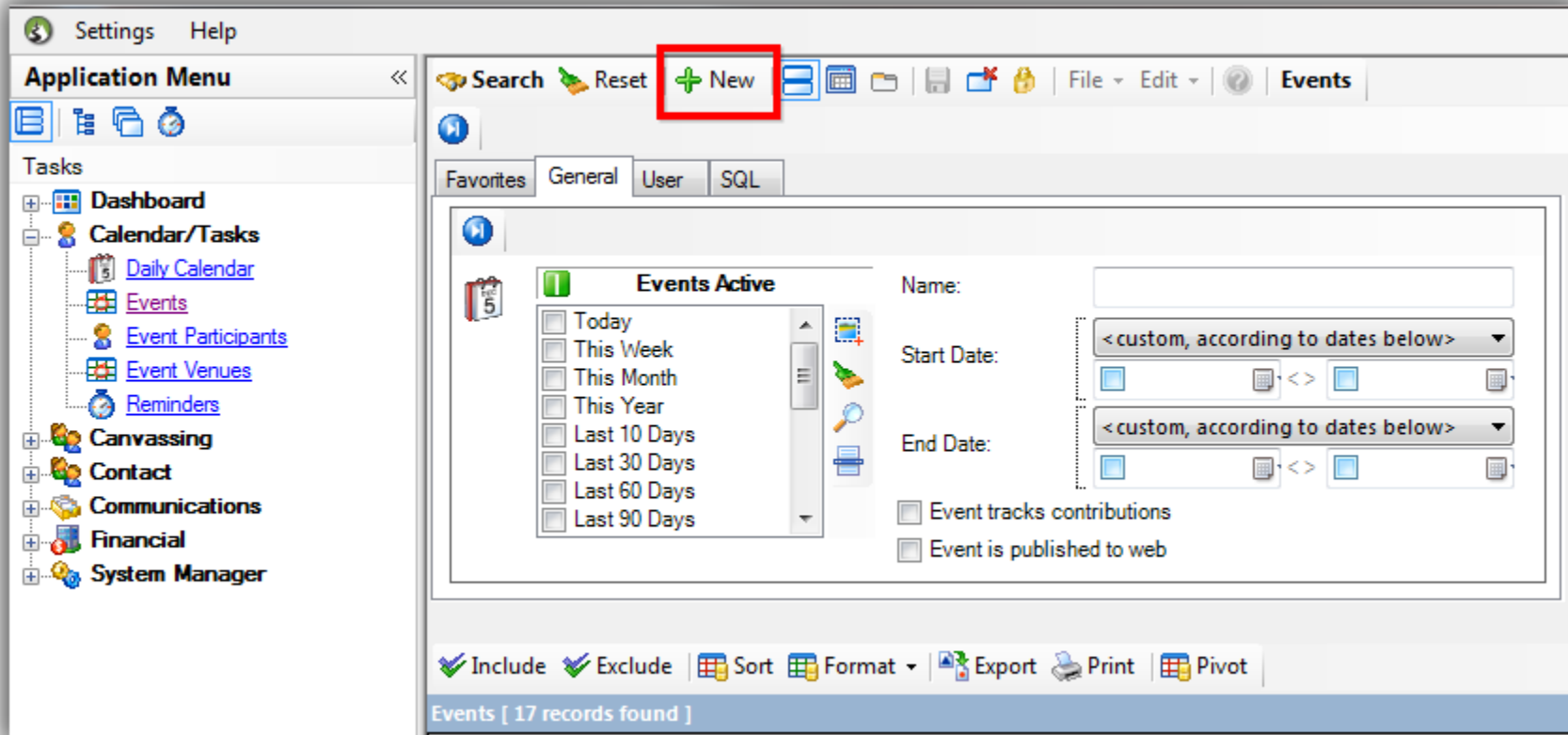
Steps

Navigate to the **Events** list by following **Application Menu > Calendar/Tasks > Events**.



If you don't see this list in your Application Menu it means you haven't been granted that [security clearance](#).

Click the **Green [+ New]** button on the Search Tool Strip.



Create a **name**, check the box to '**Enable assignment of contributions and expenses**', and then click [**Save and Close**]. *My example is below, I also added in an optional date range, and description.*

How to Add a New 'Event' to the Drop-Down List for Entering Contributions

The screenshot shows the 'New Event' form in TrailBlazer. The form is divided into two main sections: 'Event' and 'Published Event Description'.

Event Section:

- Event Name:** 2016 - Spring Capital Campaign
- Calendar Category:** (none)
- Enable assignment of contributions and expenses
- Public Event (Publish to web site)
- Start Time:** 4/ 1/2016 12:00 AM
- End Time:** 6/20/2016 12:00 PM
- Close Registration: 24 Hours Before Event
- Close Time:** 4/ 1/2016 09:48 AM

Published Event Description Section:

- Published Event Description:** This is an internal event that won't be published online, and it will track all contributions we take in for the spring capital campaign.
- Goal:** 25k
- Time:** 8 weeks
- Method:** Mass email, phone, door-to-door, and direct mails
- DB users assigned to this event:** Joel, Kevin & Mark

Orders Section:

Orders [0 records found]

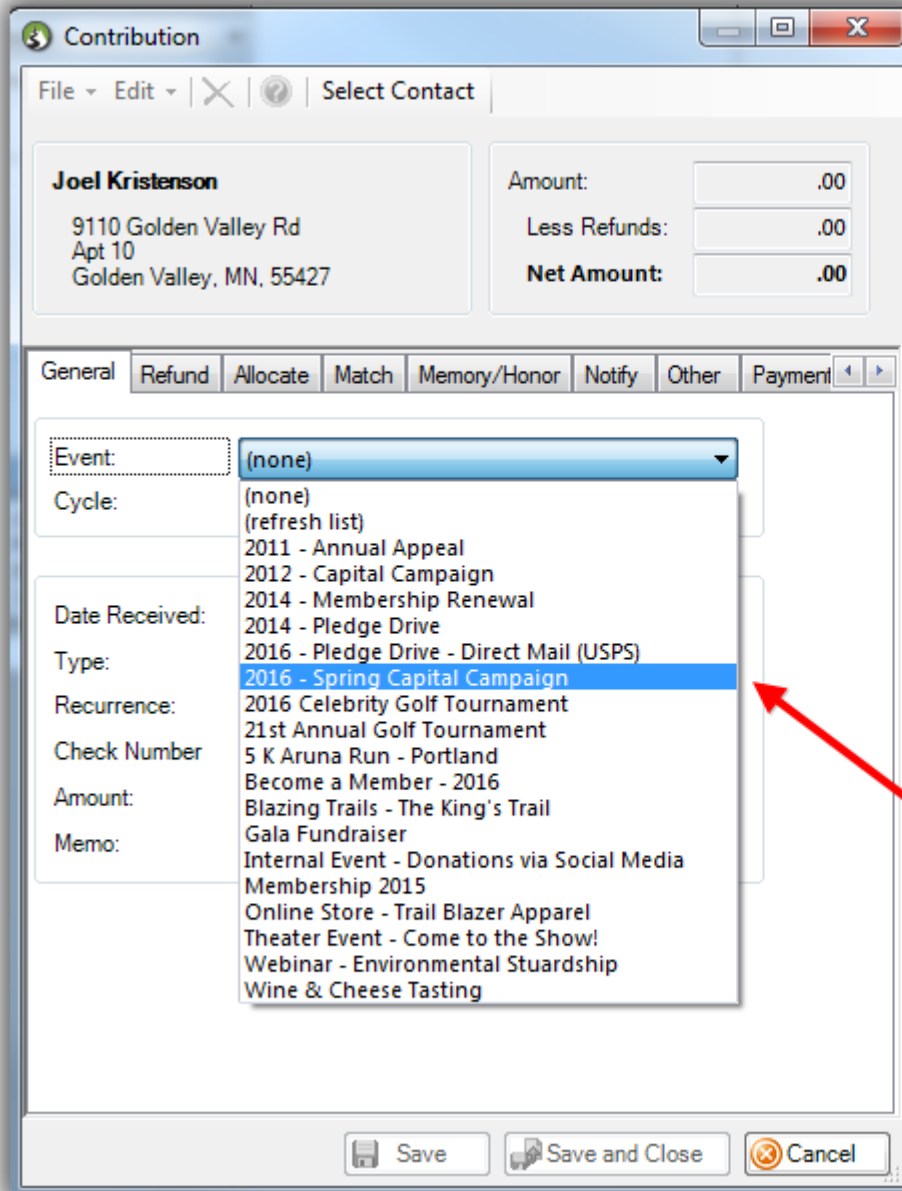
Incl	Order ID	Date Ordered	Purchaser Last Name	Purchaser First Name	Purchaser Middle Name	Order Status	Amount	Payment Type	Amount Paid	Amount Open	Buyer Com
0							.00		.00	.00	

At the bottom of the form, there are buttons for 'Save', 'Save and Close', 'Print', and 'Cancel'. The 'Save and Close' button is highlighted with a red box.

How to Add a New 'Event' to the Drop-Down List for Entering Contributions

The next time you enter a contribution record your new 'event' will display in the drop-down. *My example is below.*

How to Add a New 'Event' to the Drop-Down List for Entering Contributions

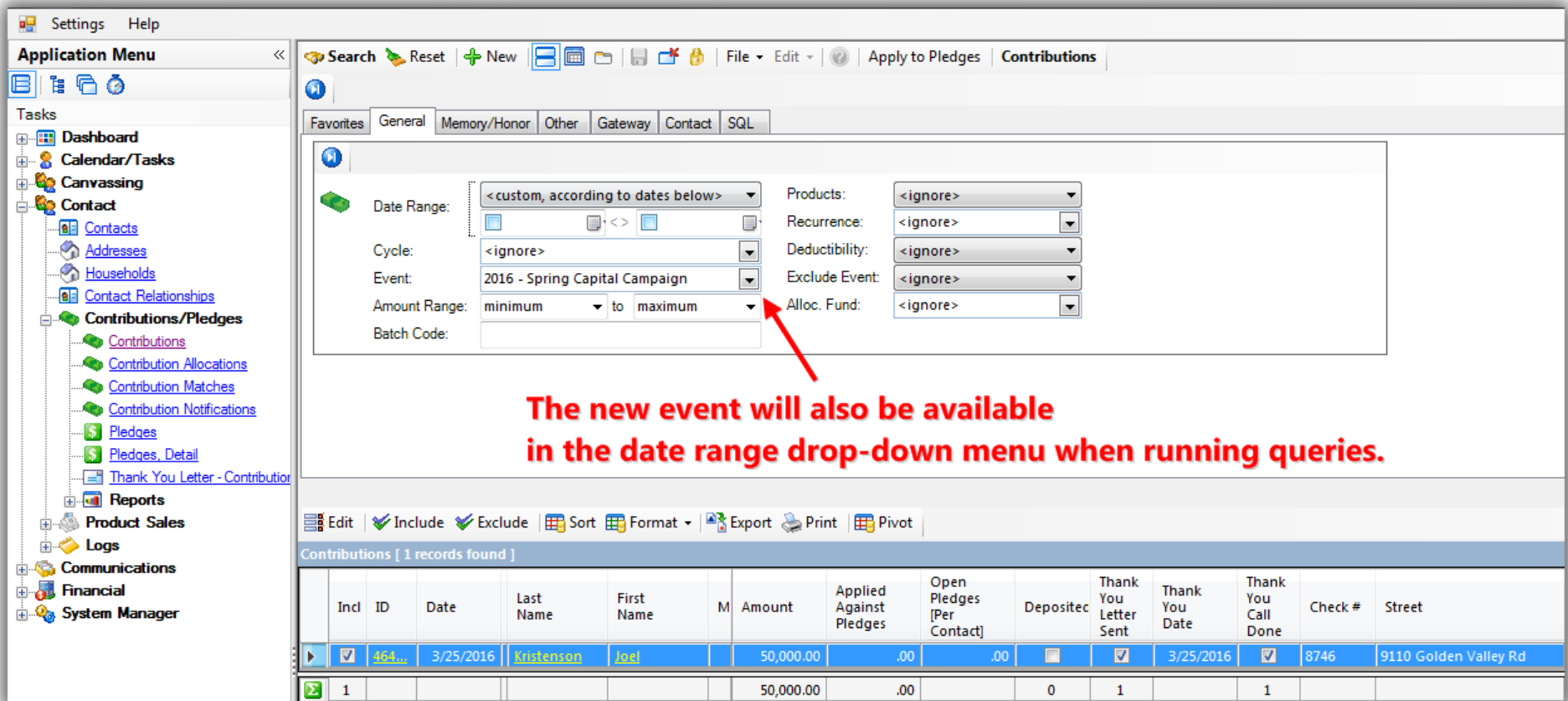


The screenshot shows the 'Contribution' window for contact 'Joel Kristenson'. The 'Event' dropdown menu is open, displaying a list of events. A red arrow points to the entry '2016 - Spring Capital Campaign', which is highlighted in blue. The window also shows fields for 'Amount', 'Less Refunds', and 'Net Amount', all set to .00. The 'General' tab is selected, and the 'Event' field is currently set to '(none)'. The dropdown list includes the following items: (none), (refresh list), 2011 - Annual Appeal, 2012 - Capital Campaign, 2014 - Membership Renewal, 2014 - Pledge Drive, 2016 - Pledge Drive - Direct Mail (USPS), 2016 - Spring Capital Campaign, 2016 Celebrity Golf Tournament, 21st Annual Golf Tournament, 5 K Aruna Run - Portland, Become a Member - 2016, Blazing Trails - The King's Trail, Gala Fundraiser, Internal Event - Donations via Social Media, Membership 2015, Online Store - Trail Blazer Apparel, Theater Event - Come to the Show!, Webinar - Environmental Stewardship, and Wine & Cheese Tasting.

Your new 'event' will display in the drop-down list.

How to Add a New 'Event' to the Drop-Down List for Entering Contributions

The option will also display when running search queries:



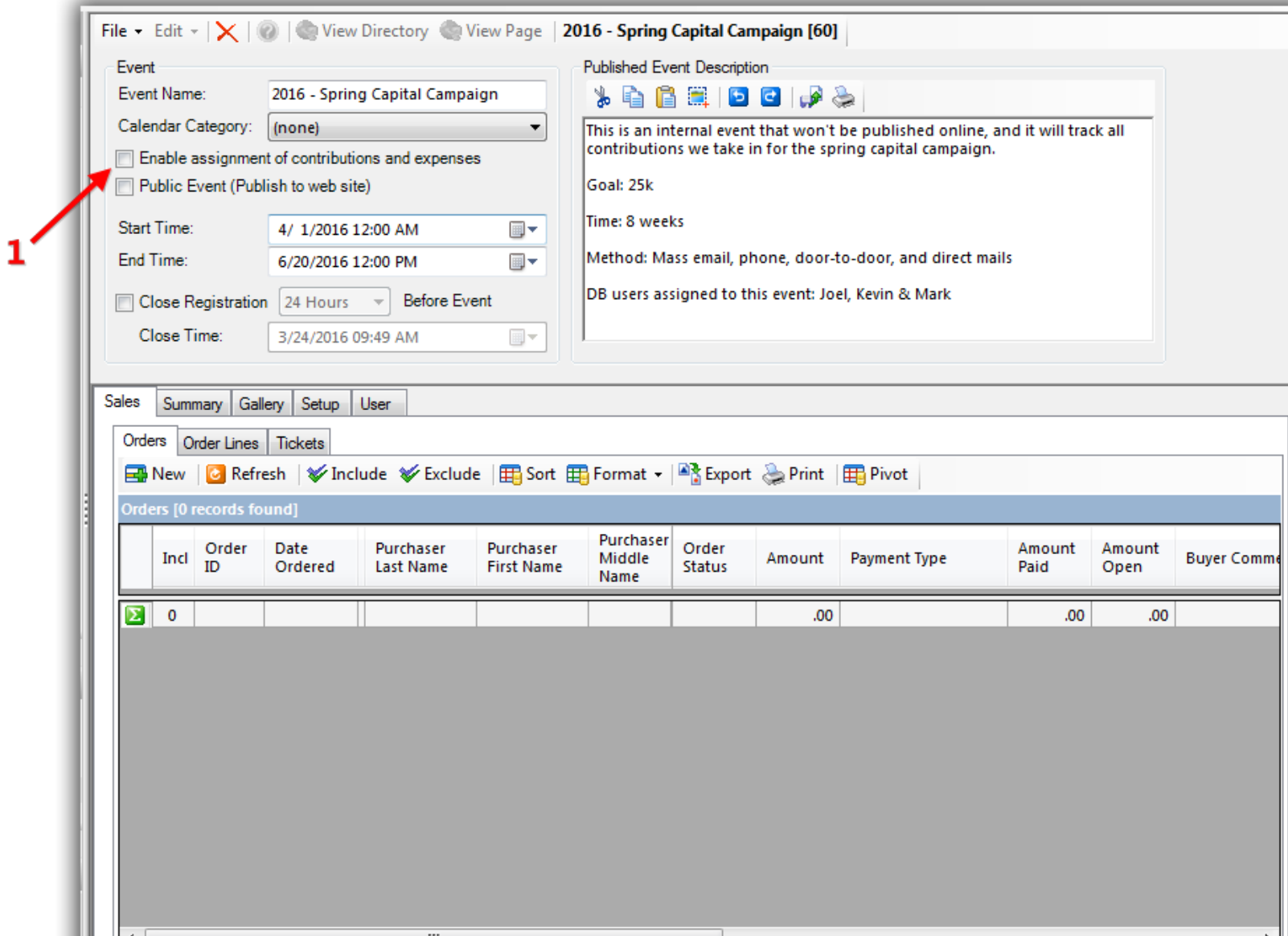
The new event will also be available in the date range drop-down menu when running queries.

Incl	ID	Date	Last Name	First Name	M	Amount	Applied Against Pledges	Open Pledges [Per Contact]	Deposited	Thank You Letter Sent	Thank You Date	Thank You Call Done	Check #	Street
<input checked="" type="checkbox"/>	464...	3/25/2016	Kristenson	Joel		50,000.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3/25/2016	<input checked="" type="checkbox"/>	3746	9110 Golden Valley Rd
<input checked="" type="checkbox"/>	1					50,000.00	.00		0	1		1		

To **remove** the event from drop-downs once you're finished assigning contributions to it you can simply open the event record back up, and **un-check** the box to 'Enable assignment of contributions and expenses'. *Example below.*

How to Add a New 'Event' to the Drop-Down List for Entering Contributions

To remove the event from your drop-down lists uncheck the box to assign contributions, and save-and-close.



The screenshot shows the 'Event' configuration window for '2016 - Spring Capital Campaign [60]'. The 'Event' section includes the following fields and options:

- Event Name: 2016 - Spring Capital Campaign
- Calendar Category: (none)
- Enable assignment of contributions and expenses (indicated by a red arrow and the number '1')
- Public Event (Publish to web site)
- Start Time: 4/ 1/2016 12:00 AM
- End Time: 6/20/2016 12:00 PM
- Close Registration: 24 Hours Before Event
- Close Time: 3/24/2016 09:49 AM

The 'Published Event Description' section contains the following text:

This is an internal event that won't be published online, and it will track all contributions we take in for the spring capital campaign.

Goal: 25k

Time: 8 weeks

Method: Mass email, phone, door-to-door, and direct mails

DB users assigned to this event: Joel, Kevin & Mark

The interface also shows a 'Sales' section with tabs for 'Summary', 'Gallery', 'Setup', and 'User'. Below this is an 'Orders' section with a table showing 0 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	Buyer Comm
0							.00		.00	.00	

This can be useful if you have a LOT of events and don't want to spend as much time scrolling through the list of past events.

The **Related Resources** below link to a variety of other event related articles and videos.



Trail Blazer™

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

Related Resources

Article: [Fund Allocation and Summary Report](#)

Article: [Manually Assigning Tickets to Specific Event Attendees \(Ticket Holders\) after the Original Purchase has been Created](#)

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

Article: [How to Print or Re-Print Event Tickets and Event Order Receipts from your Database](#)

Article: [How to Style your Event Pages – 4 Example Mock Events – Sample CSS Code with Descriptions](#)

Article: [Purchase Orders](#)

Article: [Events 2014 – Part I](#)

Article: [Events 2014 – Part II](#)

Article: [How to Print Name Badges for Event Registrants – Using Avery 5392 Name Badge Paper](#)

Article: [Membership Management – Creating & Selling Memberships Online & Manually – Tracking Renewals, Sending Out YE 'Statements' & Renewal E-Mails, and More \(Nonprofit Only\)](#)

Video: [Getting Started 106a – Entering Contributions \(NON PROFIT ONLY\)](#)

Video: [Events 2013](#)

Video: [Events – Remove Person from Event](#)

Video: [Events – pay for an event online](#)

Video: [Getting Started 106b – Entering Contributions \(POLITICAL ONLY\)](#)

Trail Blazer Live Support

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📘 **Facebook:** <https://www.facebook.com/pages/Trail-Blazer-Software/64872951180>

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