

Author: Kristenson, Joel

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Overview

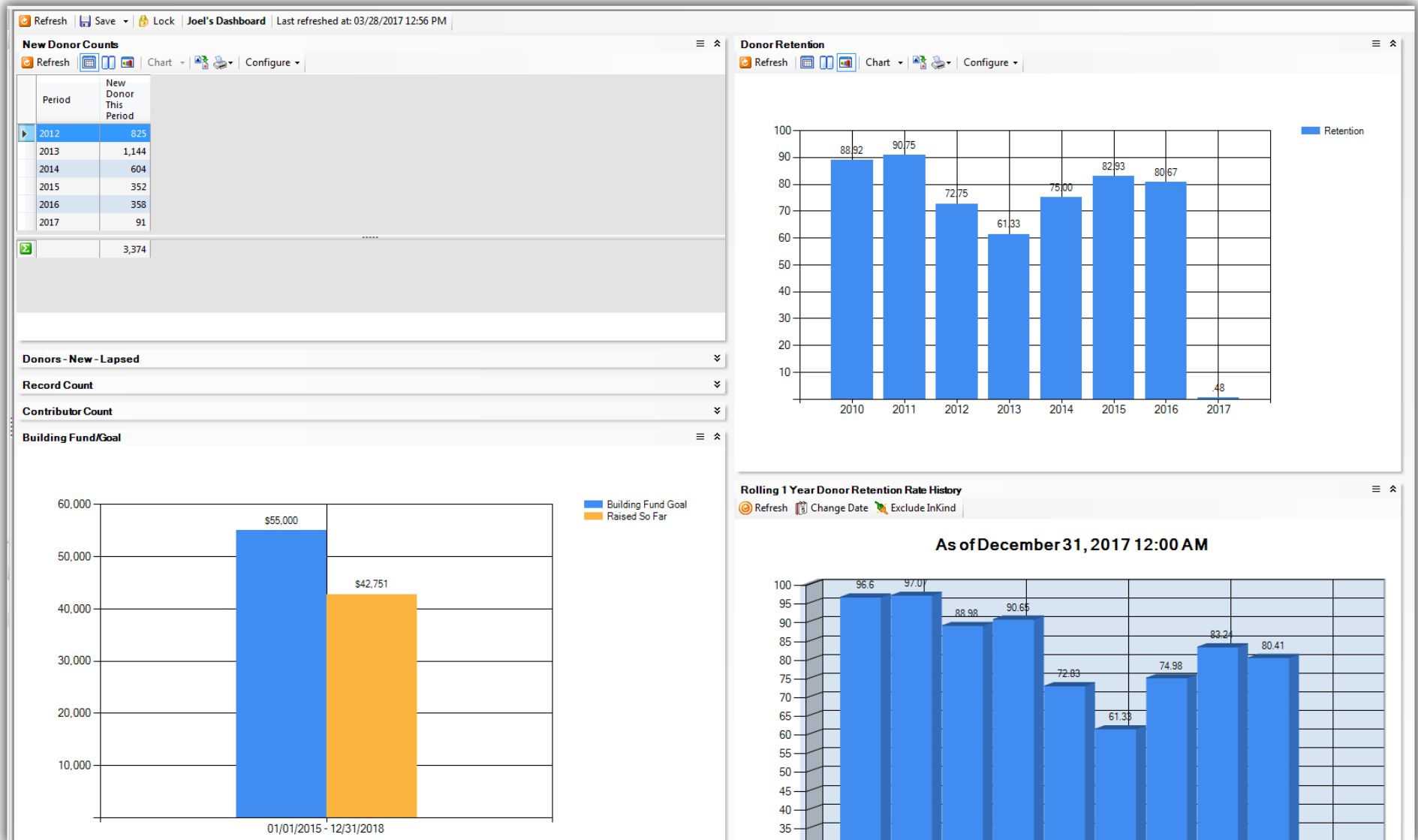
This article walks through the steps on how to add your **custom reports** as well as **pre-build metrics** to your **dashboard**, and how to save your dashboard for future use. The intent of the dashboard is to push important metrics to you in real-time as well as make it easier to view these stats visually as **configurable graphs**.

Below are 3 screenshots of an *example* dashboard:

Img 1 of 3

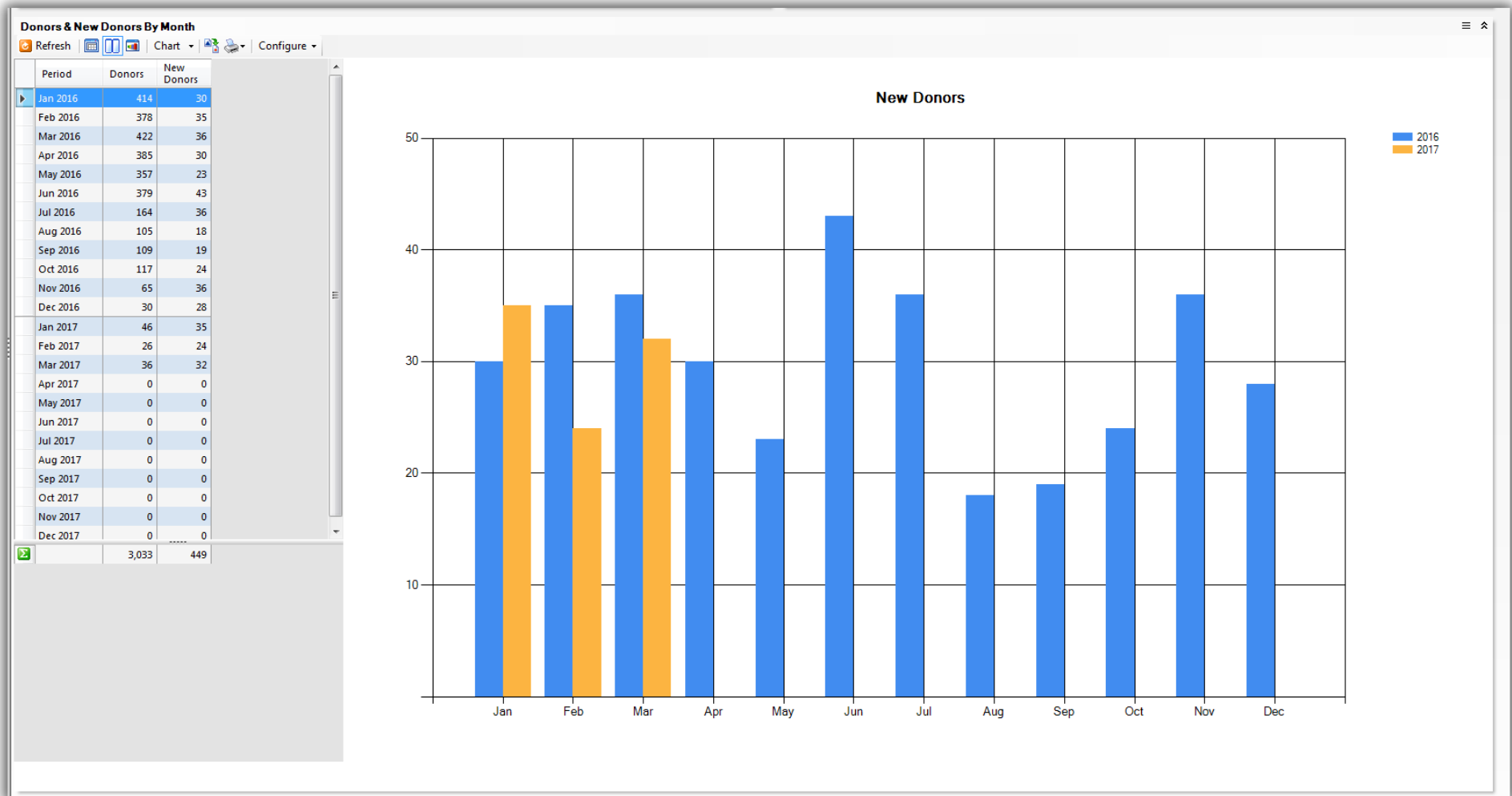
How to Build and Save Custom Dashboards – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (Powerful Real-Time Reporting) (LONG VERSION)

Example 1 - Saved Dashboard



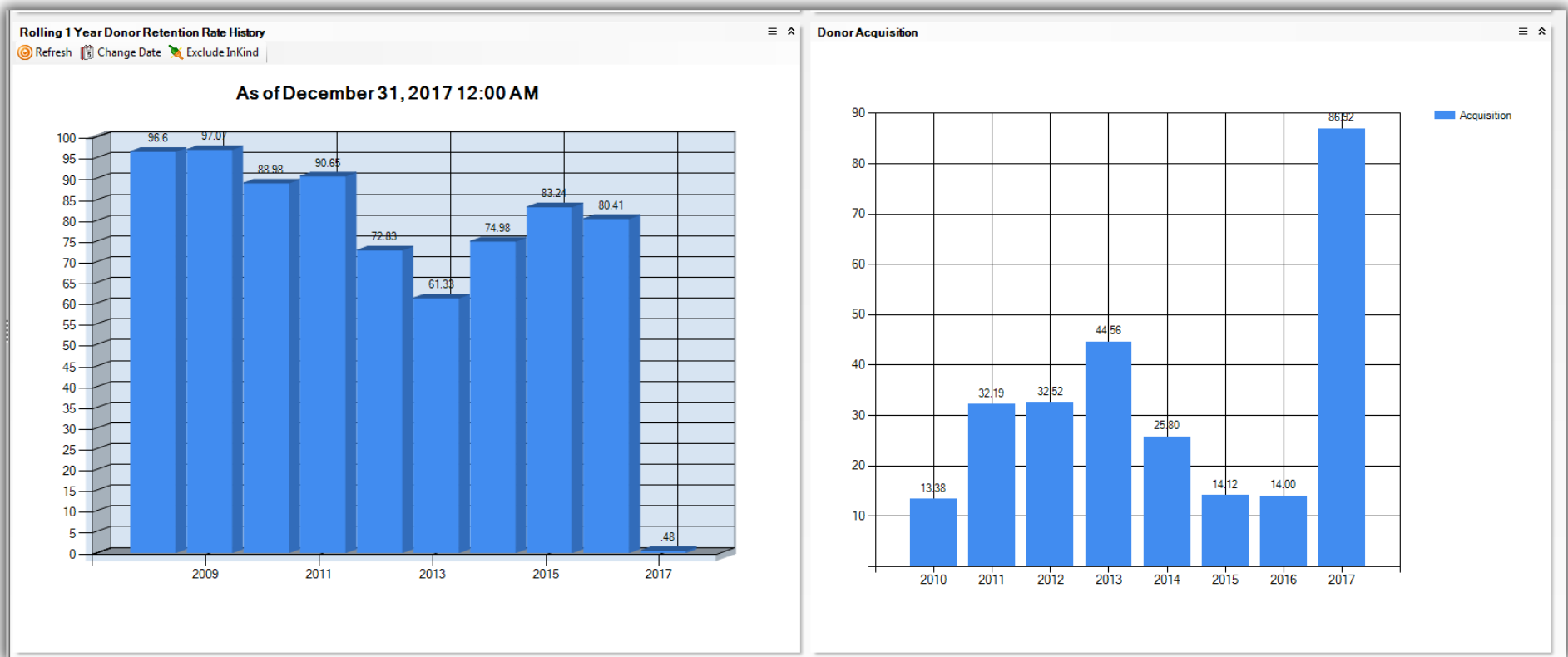
Img 2 of 3

Example 2 - Saved Dashboard



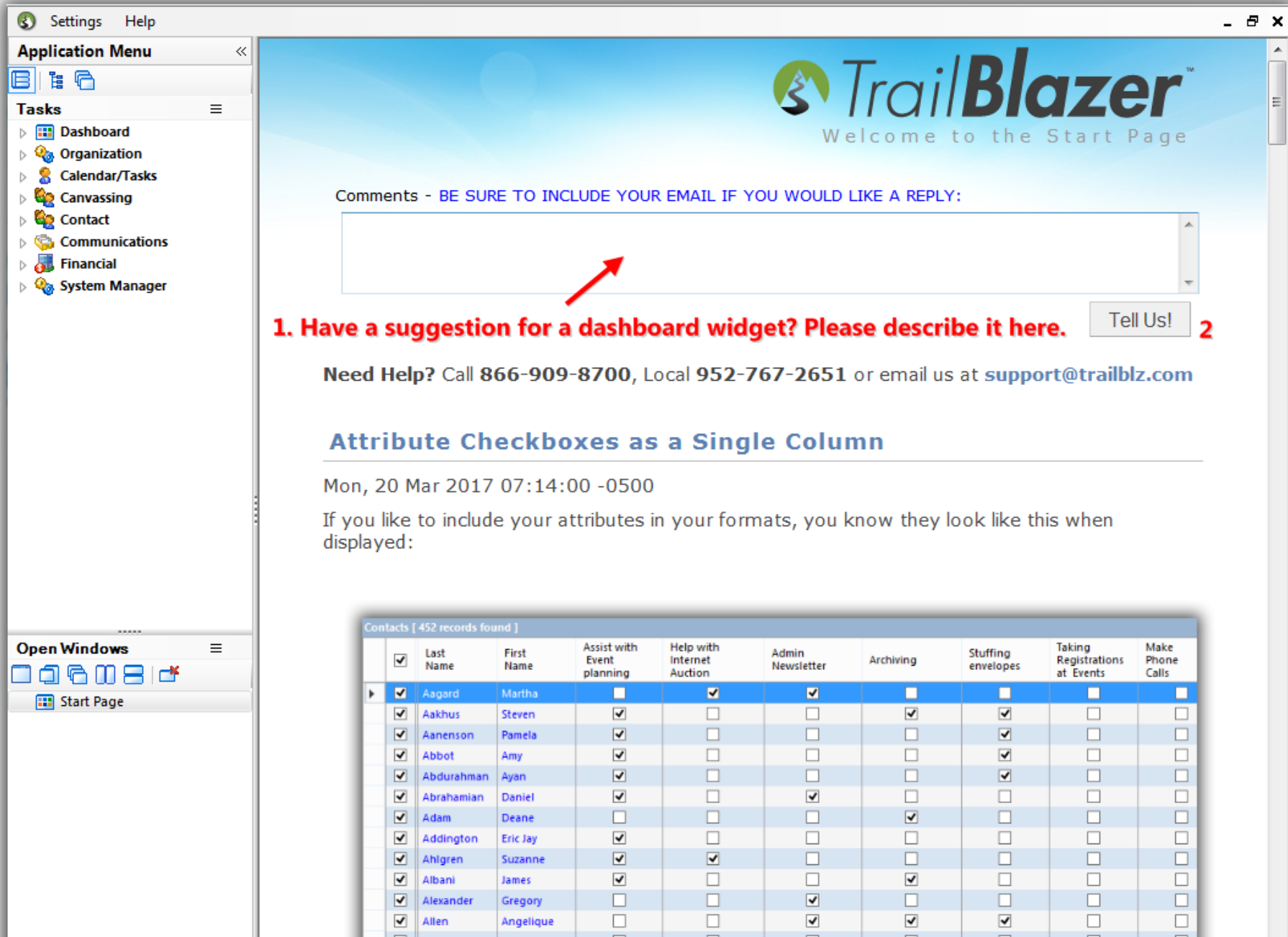
Img 3 of 3

Example 3 - Saved Dashboard



Tip: If there are other dashboard widgets and reports that you would like for your Trail Blazer that we don't currently have, you can add those **upgrade requests** through the **Comment Box** on the **Start Page** when you **first log into** your database. *These requests will go directly to our development team, if they get developed, you'll have access to them for free in a future release:*

How to Build and Save Custom Dashboards – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (*Powerful Real-Time Reporting*) (*LONG VERSION*)



Settings Help

Application Menu

- Tasks
 - Dashboard
 - Organization
 - Calendar/Tasks
 - Canvassing
 - Contact
 - Communications
 - Financial
 - System Manager

Open Windows

- Start Page

TrailBlazer™
Welcome to the Start Page

Comments - BE SURE TO INCLUDE YOUR EMAIL IF YOU WOULD LIKE A REPLY:

1. Have a suggestion for a dashboard widget? Please describe it here. **2**

Need Help? Call 866-909-8700, Local 952-767-2651 or email us at support@trailblz.com

Attribute Checkboxes as a Single Column

Mon, 20 Mar 2017 07:14:00 -0500

If you like to include your attributes in your formats, you know they look like this when displayed:

	Last Name	First Name	Assist with Event planning	Help with Internet Auction	Admin Newsletter	Archiving	Stuffing envelopes	Taking Registrations at Events	Make Phone Calls
<input checked="" type="checkbox"/>	Aagard	Martha	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Aakhus	Steven	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Aanenson	Pamela	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Abbot	Amy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Abdurahman	Ayan	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Abrahamian	Daniel	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Adam	Deane	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Addington	Eric Jay	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Ahigren	Suzanne	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Albani	James	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Alexander	Gregory	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Allen	Angelique	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Outline

- #1 Create a New Dashboard and Add a Saved List (Query) & View (Format) onto your Dashboard
- #2 Add Trail Blazer's Predefined Metrics with Drag-and-Drop (Ex: Donor Retention & Organization Stats)
- #3 Related Resources

#1 – Create a New Dashboard and Add a Saved List (Query) & View (Format) onto your Dashboard (Ex: New Donors this Year)

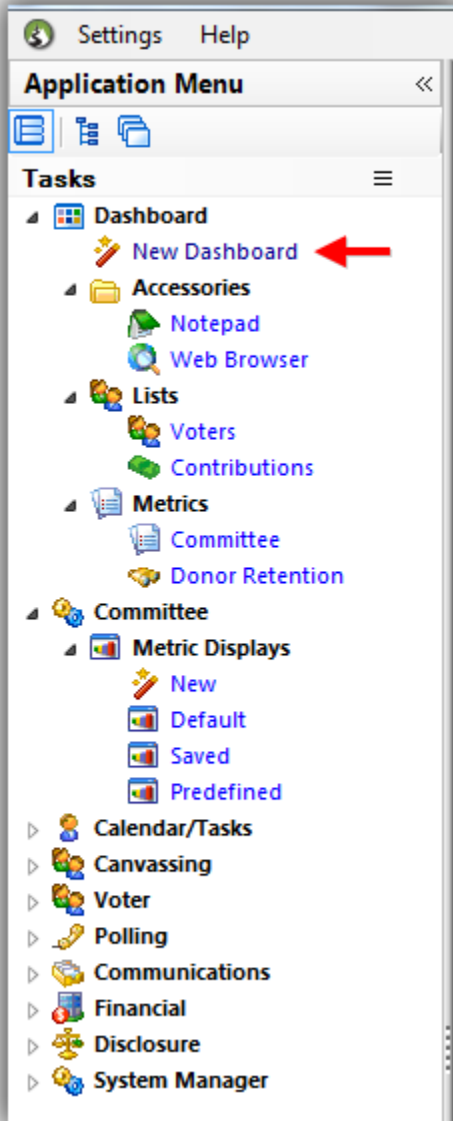
Perquisites:

- Learn about building and saving **search queries** by reading [this article](#) and watching [this video](#)
- Learn about building and saving **formats** by reading [this article](#) and watching [this video](#)

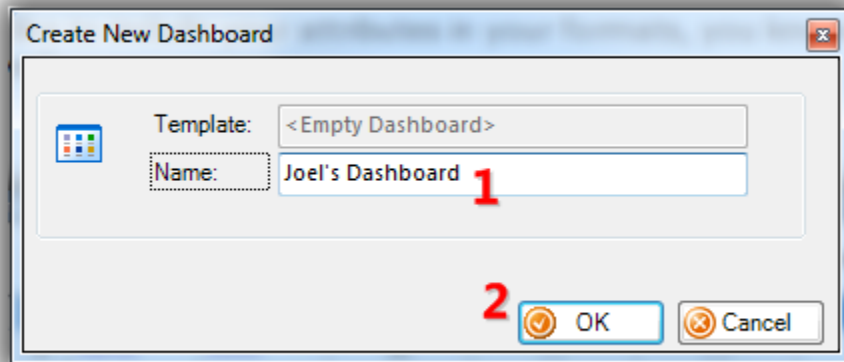
How to Build and Save **Custom Dashboards** – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (*Powerful Real-Time Reporting*) (**LONG VERSION**)

For this part you'll **need** to first **build** and **save** a **search query** and a **format** (view) to go along with it, in either the **Contacts** (Donors/Voters) list and/or the **Contributions** list. *In my example I saved a [query](#) for 'new donors - 2017' and a [format](#) that shows their name, phone, location, and contribution total.*

Click on the **New Dashboard** branch under the **Application Menu**.

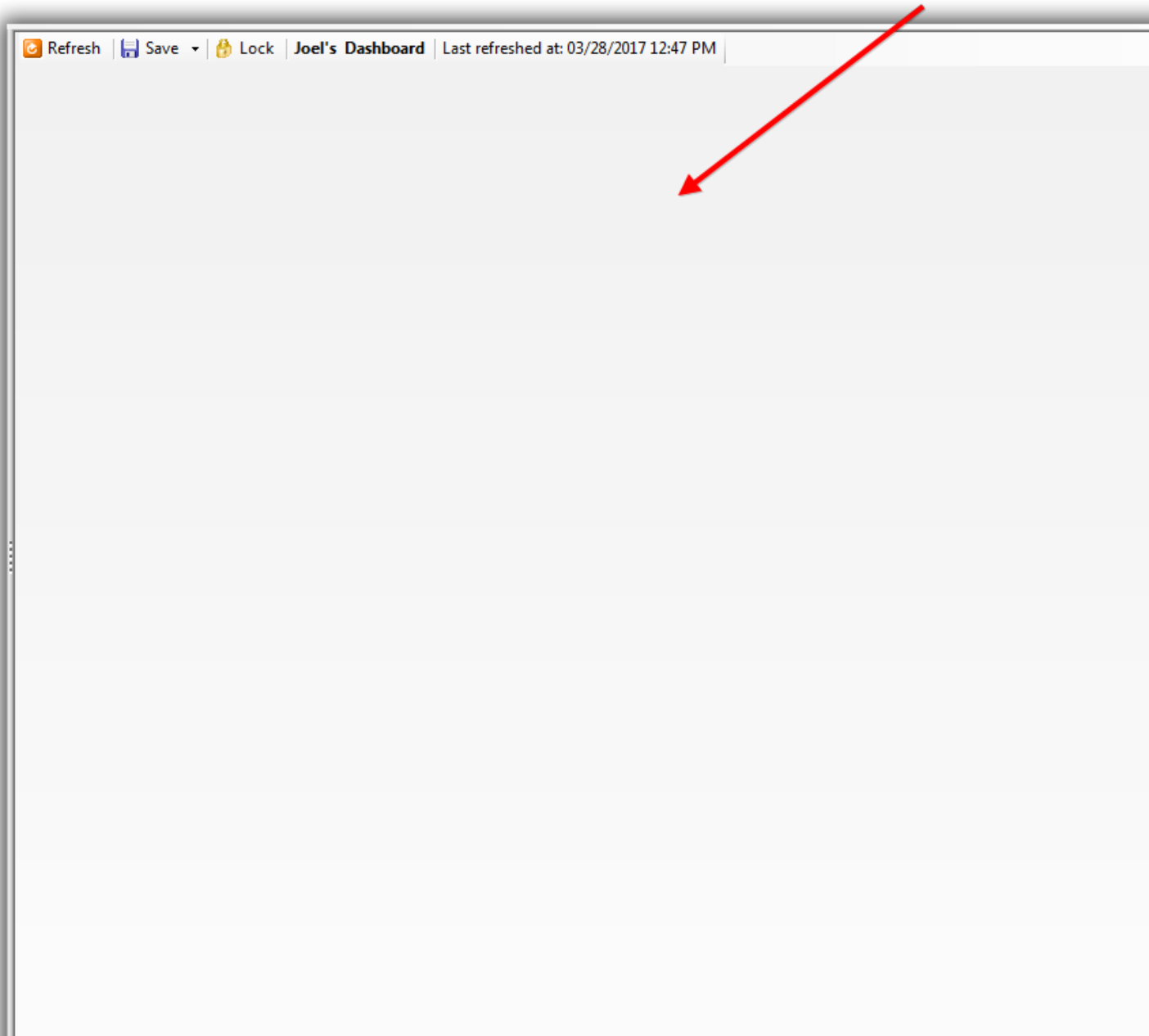


Create a **name** and click **[OK]**. *In my example I called mine Joel's Dashboard.*



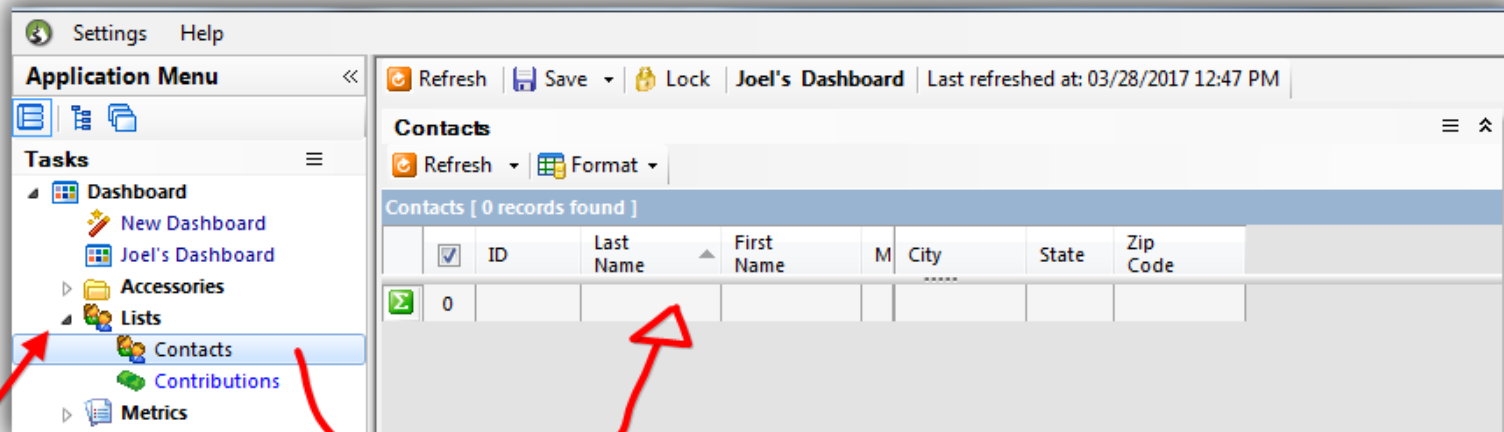
A **blank** dashboard **canvas** will open like the one below.

When creating your new dashboard you'll start with a blank canvass.



How to Build and Save **Custom Dashboards** – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (*Powerful Real-Time Reporting*) (**LONG VERSION**)

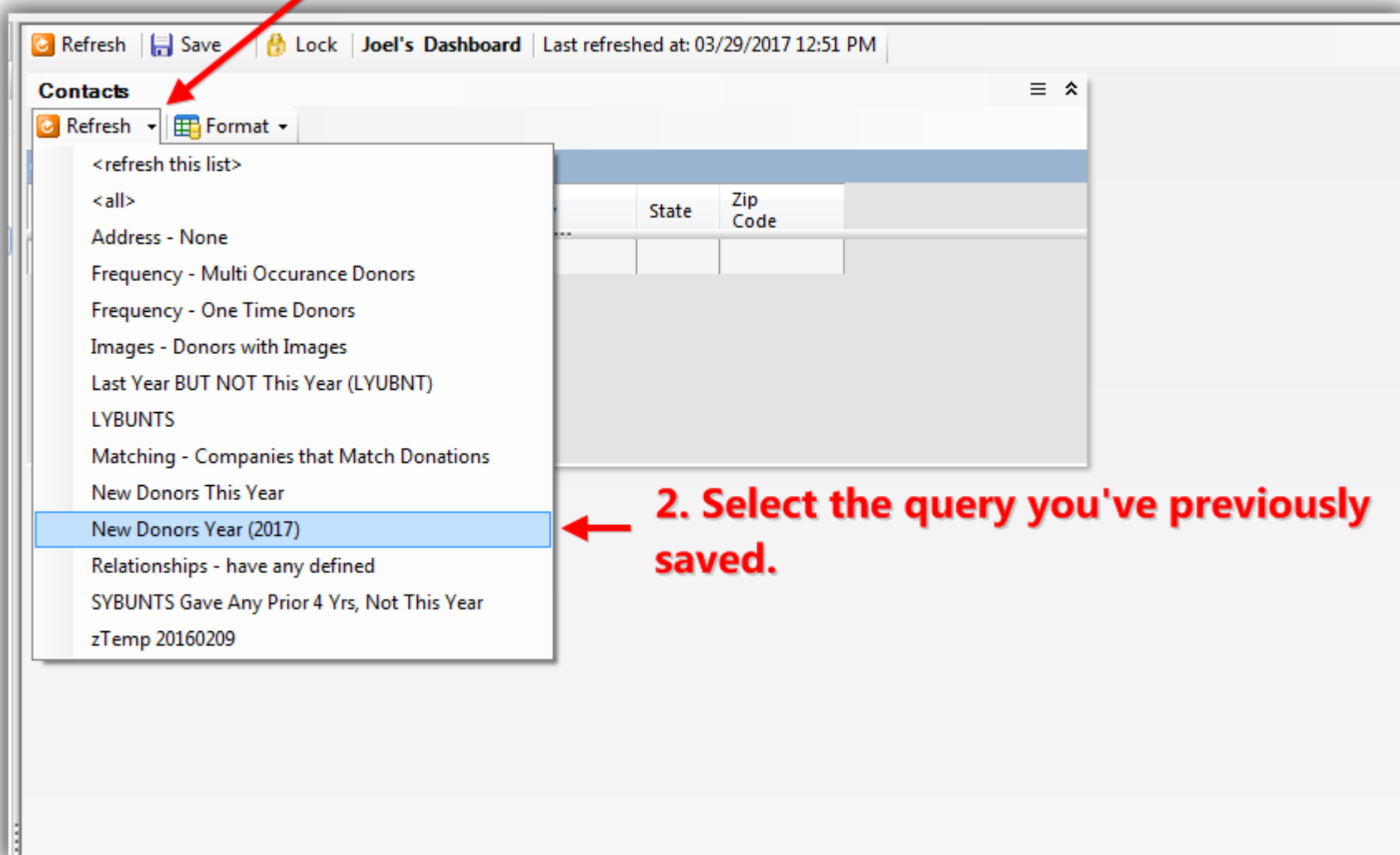
Expand the **Lists** branch under **Dashboard** and then **click-and-drag** either the **Contacts** (Donors/Voters) or **Contributions** list onto your dashboard and **release** it. *In my example I dragged the Contacts list (which is where I previously build and saved my query and format).*



1. Expand the Lists branch.

2. Drag-and-release either the 'Contacts' (Voters/Donors) or 'Contributions' list onto your dashboard.

Click the **drop-down** next to [**Refresh**] and select the **query** you've previously saved. *In my example it was called New Donors Year (2017).*



1

2. Select the query you've previously saved.

Refresh Save Lock Joel's Dashboard Last refreshed at: 03/29/2017 12:51 PM

Contacts

Refresh Format

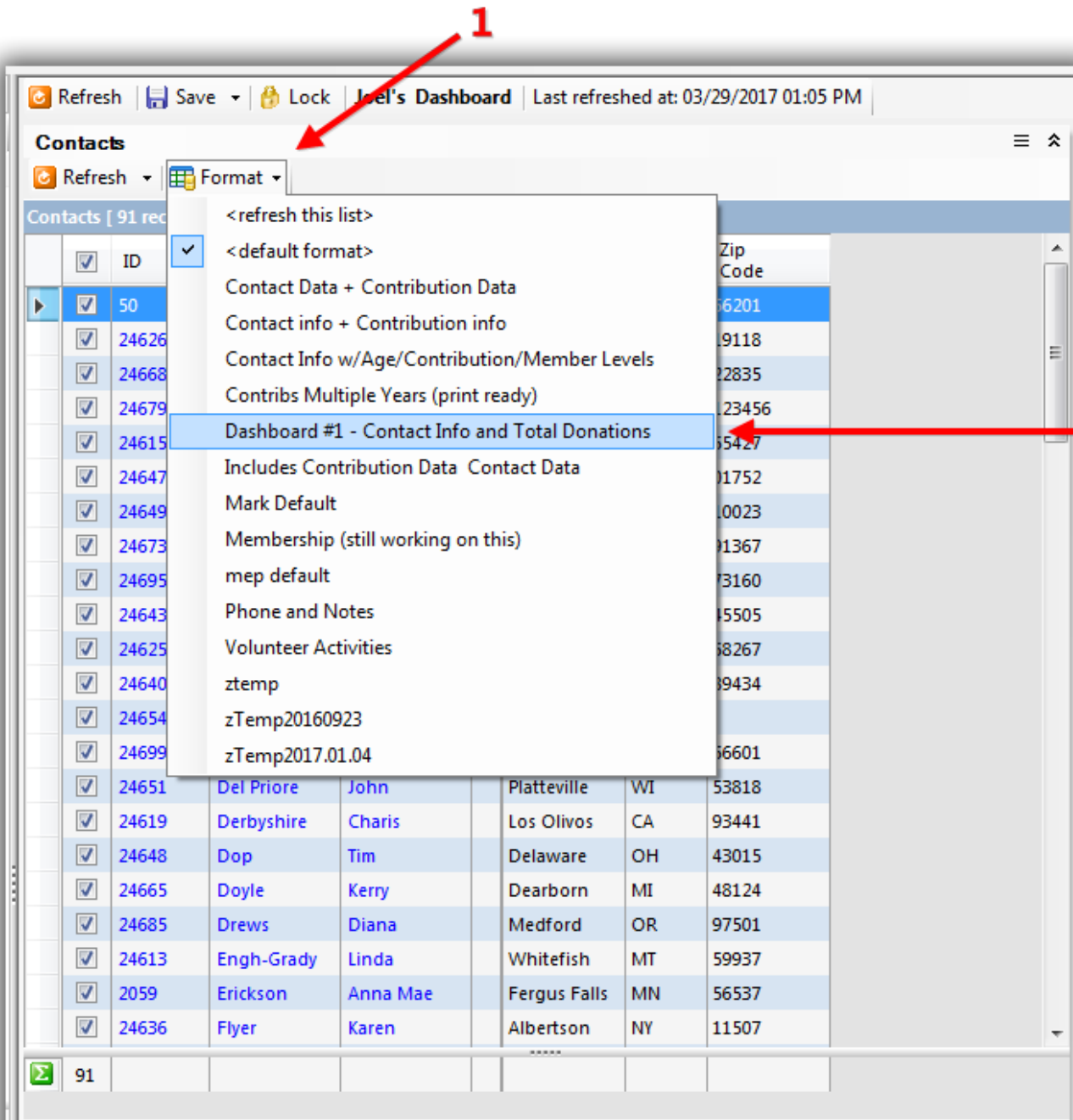
- <refresh this list>
- <all>
- Address - None
- Frequency - Multi Occurance Donors
- Frequency - One Time Donors
- Images - Donors with Images
- Last Year BUT NOT This Year (LYUBNT)
- LYBUNTS
- Matching - Companies that Match Donations
- New Donors This Year
- New Donors Year (2017)**
- Relationships - have any defined
- SYBUNTS Gave Any Prior 4 Yrs, Not This Year
- zTemp 20160209

State	Zip Code

How to Build and Save **Custom Dashboards** – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (*Powerful Real-Time Reporting*) (**LONG VERSION**)

The query (list) you select will populate. Click the **[Format] drop-down** and select the format (view) you previously saved. *In my example it was called 'Dashboard #1 – Contact Info and Total Donations'.*

How to Build and Save Custom Dashboards – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (*Powerful Real-Time Reporting*) (*LONG VERSION*)



Refresh Save Lock Joel's Dashboard Last refreshed at: 03/29/2017 01:05 PM

Contacts

Refresh Format

Contacts [91 rec

- <refresh this list>
- <default format>
- Contact Data + Contribution Data
- Contact info + Contribution info
- Contact Info w/Age/Contribution/Member Levels
- Contribs Multiple Years (print ready)
- Dashboard #1 - Contact Info and Total Donations**
- Includes Contribution Data Contact Data
- Mark Default
- Membership (still working on this)
- mep default
- Phone and Notes
- Volunteer Activities
- ztemp
- zTemp20160923
- zTemp2017.01.04

ID	First Name	Last Name	Address	City	State	Zip Code
50						6201
24626						9118
24668						2835
24679						23456
24615						5427
24647						01752
24649						00023
24673						01367
24695						03160
24643						05505
24625						08267
24640						09434
24654						06601
24699						
24651	Del Priore	John	Platteville	WI		53818
24619	Derbyshire	Charis	Los Olivos	CA		93441
24648	Dop	Tim	Delaware	OH		43015
24665	Doyle	Kerry	Dearborn	MI		48124
24685	Drews	Diana	Medford	OR		97501
24613	Engh-Grady	Linda	Whitefish	MT		59937
2059	Erickson	Anna Mae	Fergus Falls	MN		56537
24636	Flyer	Karen	Albertson	NY		11507

91

2. Select the format you previously saved.

Adjust the **height** and **width** of the new metric you created, and then click **[Save]**.

How to Build and Save Custom Dashboards – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (Powerful Real-Time Reporting) (LONG VERSION)

Save the dashboard as you make changes.

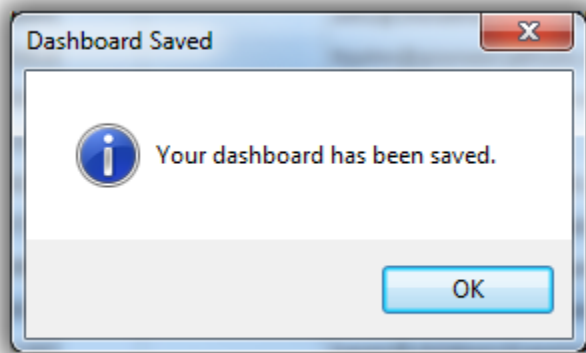
Refresh Save Lock Joel's Dashboard Last refreshed at: 03/29/2017 12:51 PM

Contacts [91 records found]

<input checked="" type="checkbox"/>	Last Name	First Name	Street	Street 2	City	State	Zip Code	Home Phone	Email	Contribution Total
<input checked="" type="checkbox"/>	Agre	Lisa	501 Augusta Ave SE		Willmar	MN	56201	(320) 220-9111		50.00
<input checked="" type="checkbox"/>	Amuso	Colleen	17 Chestnut Hill Ave E		Philadelphia	PA	19118		camuso@omcparish.com	56.12
<input checked="" type="checkbox"/>	Arcand	Roberta	PO Box 269		Luray	VA	22835		arcand1173@gmail.com	78.12
<input checked="" type="checkbox"/>	Barnes	Andrea	123 Main St		Salt Lake City	UT	123456		andrea@andreabarnesglobal.com	135.00
<input checked="" type="checkbox"/>	Beek	Lauren	123 Main St		Minneapolis	MN	55427		lauren.suz.fischer@gmail.com	45.12
<input checked="" type="checkbox"/>	Betley	Greg	65 Boston Post Rd W	Suite 220	Marlborough	MA	01752		geebetley@gmail.com	145.32
<input checked="" type="checkbox"/>	Blachly	James	140 W69th St 61c		New York	NY	10023		experientialorchestra@gmail.com	145.12
<input checked="" type="checkbox"/>	Bonn	Greg	6340 Variel Ave		Woodland Hills	CA	91367		gbonn@cdikids.org	525.00
<input checked="" type="checkbox"/>	Braisher	Mark	3701 I-35 Service Rd S		Moore	OK	73160		mbraisher@ru.edu	88.10
<input checked="" type="checkbox"/>	Brandstetter	Mary	2160 Old Selma Rd		Springfield	OH	45505		mbrandstetter@tacind.com	145.12
<input checked="" type="checkbox"/>	Bruns	Wade	PO Box 282		Northwood	ND	58267		wbruns@integrity.com	68.12
<input checked="" type="checkbox"/>	Chau	Jeannie	550 Italy Dr		Mccarran	NV	89434		jchau@fbnn.org	455.12
<input checked="" type="checkbox"/>	Cige	Mara							mara.cige@conservewildlifenj.org	100.00
<input checked="" type="checkbox"/>	Dehnert	Susie	206 5th St Northwest	Suite 101	Bemidji	ND	56601		info@shinethelightinc.org	145.00
<input checked="" type="checkbox"/>	Del Priore	John	135 Hickory St S		Platteville	WI	53818		frjohn@pioneeratholic.org	88.12
<input checked="" type="checkbox"/>	Derbyshire	Charis	PO Box 8		Los Olivos	CA	93441		caderbyshire@midland-school.org	65.12
<input checked="" type="checkbox"/>	Dop	Tim	4920 Highway 37		Delaware	OH	43015		timdop@yahoo.com	89.12
<input checked="" type="checkbox"/>	Doyle	Kerry	21400 Oakwood		Dearborn	MI	48124		Kdoyle@thedrivingspirit.org	65.12
<input checked="" type="checkbox"/>	Drews	Diana	PO Box 668		Medford	OR	97501		ddrews@roguevalleyhabitat.org	88.00
<input checked="" type="checkbox"/>	Engh-Grady	Linda	214 2nd St W		Whitefish	MT	59937		linda@whitefishcommunityfoundation.org	1,000.00
<input checked="" type="checkbox"/>	Erickson	Anna Mae	802 Mill St S	Apt 331	Fergus Falls	MN	56537	(218) 736-8828	Anna Mae@Erickson.com	1,000.00
<input checked="" type="checkbox"/>	Flyer	Karen	7 Edgemere Dr		Albertson	NY	11507		karen@childrenshopeindia.org	358.75
<input checked="" type="checkbox"/>	Garecki	Kevan	PO Box 73		Abbotsford	BC	V2S 6Z4		kg@portal.ca	45.12
<input checked="" type="checkbox"/>	Gibbons	Toni	1100 Bagley Ave		Rochester Hills	MI	48309		tgibbons@lhsa.com	145.12
<input checked="" type="checkbox"/>	Grady	Sherry	123 Main St		Minneapolis	MN	55427		grady76ts@comcast.net	78.12
<input checked="" type="checkbox"/>	Hanlin	Tracey	2160 Old Selma Rd		Springfield	OH	45505		thanlin@tacind.com	783.12
<input checked="" type="checkbox"/>	Haskins	Rick	600 Bell Ave N		Carnegie	PA	15106		rhaskins15202@gmail.com	45.12
<input checked="" type="checkbox"/>	Hewitt	Jen	1525 Frye Rd W		Chandler	AR	85224		Hewitt.jennifer@cusd80.com	117.12
<input checked="" type="checkbox"/>	Hiranandani	Karishma	123 Main		Boston	MA	123456		karishma@bhakticenter.org	121.12
<input checked="" type="checkbox"/>	Homer	Doug	601 Pemberton Browns Mill ...		Pemberton	NJ	08068		doug@nextgenusa.org	78.12
<input checked="" type="checkbox"/>	Hunter	Brent	1830 Romneya Dr W		Anaheim	CA	92801		bhunter@nocccd.edu	145.12
<input checked="" type="checkbox"/>	Jeffries	Wendy	PO Box 751		Brooklandville	MD	21022		tastewisekids@gmail.com	155.00
<input checked="" type="checkbox"/>	Johansson	Lori	122 State St W		Trenton	NJ	08608		lori.johansson@gmail.com	125.00
<input checked="" type="checkbox"/>	Johnson	Ann	PO Box 682141		Park City	UT	84060		ann@peacehouse.org	220.77
91										14,937.92

1. Adjust the height and width as needed.

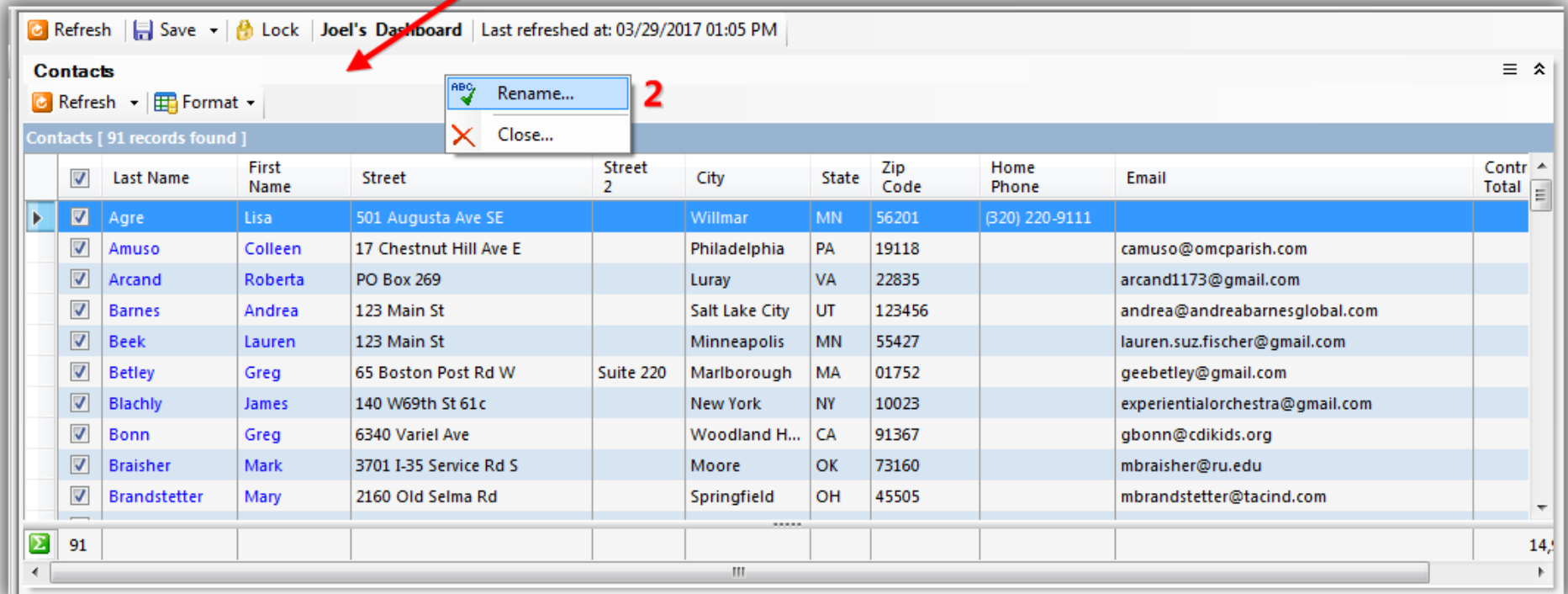
Click **[OK]** once your changes are saved. *The next time you log in these changes will be retained when clicking on your new dashboard under the Application Menu.*



You can **rename** or **remove** items off the dashboard by **right-clicking** on the **banner** to bring up a context menu. *In my example below I renamed my first widget from Contacts to 'New Donors (2017)'.*

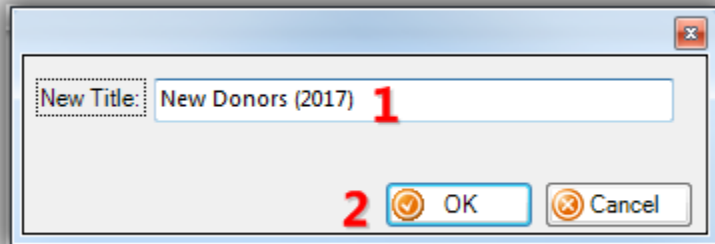
How to Build and Save Custom Dashboards – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (Powerful Real-Time Reporting) (LONG VERSION)

1. Right-click on the banner to bring up a context menu.



The screenshot shows a web dashboard titled "Joel's Dashboard" with a "Contacts" widget. The widget has a banner area at the top with "Refresh" and "Format" buttons. A context menu is open over the banner, showing "Rename..." and "Close..." options. A red arrow points to the banner area, and a red number "2" is next to the context menu. Below the banner is a table with 91 records found. The table has columns for Last Name, First Name, Street, Street 2, City, State, Zip Code, Home Phone, Email, and Contr Total.

<input checked="" type="checkbox"/>	Last Name	First Name	Street	Street 2	City	State	Zip Code	Home Phone	Email	Contr Total
<input checked="" type="checkbox"/>	Agre	Lisa	501 Augusta Ave SE		Willmar	MN	56201	(320) 220-9111		
<input checked="" type="checkbox"/>	Amuso	Colleen	17 Chestnut Hill Ave E		Philadelphia	PA	19118		camuso@omcparish.com	
<input checked="" type="checkbox"/>	Arcand	Roberta	PO Box 269		Luray	VA	22835		arcand1173@gmail.com	
<input checked="" type="checkbox"/>	Barnes	Andrea	123 Main St		Salt Lake City	UT	123456		andrea@andreabarnesglobal.com	
<input checked="" type="checkbox"/>	Beek	Lauren	123 Main St		Minneapolis	MN	55427		lauren.suz.fischer@gmail.com	
<input checked="" type="checkbox"/>	Betley	Greg	65 Boston Post Rd W	Suite 220	Marlborough	MA	01752		geebetley@gmail.com	
<input checked="" type="checkbox"/>	Blachly	James	140 W69th St 61c		New York	NY	10023		experientialorchestra@gmail.com	
<input checked="" type="checkbox"/>	Bonn	Greg	6340 Variel Ave		Woodland H...	CA	91367		gbonn@cdikids.org	
<input checked="" type="checkbox"/>	Braisher	Mark	3701 I-35 Service Rd S		Moore	OK	73160		mbraisher@ru.edu	
<input checked="" type="checkbox"/>	Brandstetter	Mary	2160 Old Selma Rd		Springfield	OH	45505		mbrandstetter@tacind.com	



Repeat these steps for all **Contact** (Voter/Donor) and **Contribution** lists you want to display on your dashboard. *In my example I added three different ones as shown below, and renamed each of the metrics (widgets).*

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Example start to a dashboard with 3 widgets using the Contacts (Voters/Donors) lists and the Contributions list.

Save as you go. You can resize and rename each metric (widget) as needed.

Refresh Save Lock **Joel's Dashboard** Last refreshed at: 03/29/2017 01:05 PM

New Donors (2017)

Refresh Format

Contacts [91 records found]

<input type="checkbox"/>	Last Name	First Name	Street	City	State	Zip Code	Home Phone	Email	Contribution Total
<input checked="" type="checkbox"/>	Agre	Lisa	501 Augusta Ave SE	Willmar	MN	56201	(320) 220-9111		50.00
<input checked="" type="checkbox"/>	Amuso	Colleen	17 Chestnut Hill Ave E	Philadelphia	PA	19118		camuso@omcparish.com	56.12
<input checked="" type="checkbox"/>	Arcand	Roberta	PO Box 269	Luray	VA	22835		arcand1173@gmail.com	78.12
<input checked="" type="checkbox"/>	Barnes	Andrea	123 Main St	Salt Lake City	UT	123456		andrea@andreabarnesglobal.com	135.00
<input checked="" type="checkbox"/>	Beek	Lauren	123 Main St	Minneapolis	MN	55427		lauren.suz.fischer@gmail.com	45.12
<input checked="" type="checkbox"/>	Betley	Greg	65 Boston Post Rd W	Marlborough	MA	01752		geebetley@gmail.com	145.32
<input checked="" type="checkbox"/>	Blachly	James	140 W69th St 61 c	New York	NY	10023		experientialorchestra@gmail.com	145.12
<input checked="" type="checkbox"/>	Bonn	Greg	6340 Variel Ave	Woodland H...	CA	91367		gbonn@cdikids.org	525.00
<input checked="" type="checkbox"/>	Braisher	Mark	3701 I-35 Service Rd S	Moore	OK	73160		mbraisher@ru.edu	88.10
<input checked="" type="checkbox"/>	Brandstetter	Mary	2160 Old Selma Rd	Springfield	OH	45505		mbrandstetter@tacind.com	145.12
<input checked="" type="checkbox"/>	Bruns	Wade	PO Box 282	Northwood	ND	58267		wbruns@integrity.com	68.12
<input checked="" type="checkbox"/>	Chau	Jeannie	550 Italy Dr	Mccarran	NV	89434		ichau@fbnn.org	455.12
91									14,937.92

Volunteer Contributions Over \$100

Refresh Format

Contributions [949 records found]

<input type="checkbox"/>	Date	Last Name	First Name	Amount	City	State	Zip Code
<input checked="" type="checkbox"/>	1/9/2011	Allen	John	110.00	Roseville	MN	55113
<input checked="" type="checkbox"/>	1/19/2011	Devito	Cynthia	240.00	Stillwater	MN	55082
<input checked="" type="checkbox"/>	1/22/2011	Wagner	Cox	240.00	Nashville	TN	37208
<input checked="" type="checkbox"/>	1/30/2011	McHenry	Walt	160.00	Crystal	CT	06500
<input checked="" type="checkbox"/>	1/31/2011	Atchley	Julie	240.00	Artesia	CA	90701
<input checked="" type="checkbox"/>	2/4/2011	Behling	Mary	110.00	Fort Atkins...	WI	53538
<input checked="" type="checkbox"/>	2/9/2011	Allen	John	110.00	Roseville	MN	55113
<input checked="" type="checkbox"/>	2/21/2011	Duncan	Kojo	260.00	Brooklyn P...	MN	55443
<input checked="" type="checkbox"/>	2/22/2011	Thompson	Amber	150.00	New Port R...	FL	34655
<input checked="" type="checkbox"/>	2/25/2011	Marlow	Diane	230.00	Austin	TX	78756
<input checked="" type="checkbox"/>	3/2/2011	Cisowski	Joseph	170.00	Oak Lawn	IL	60453-6307
<input checked="" type="checkbox"/>	3/2/2011	McHenry	Kathleen	260.00	Crystal	CT	06500
949				420,058.79			

LYBUNT (Gave Last Year But Unfortunately Not This)

Refresh Format

Contacts [2878 records found]

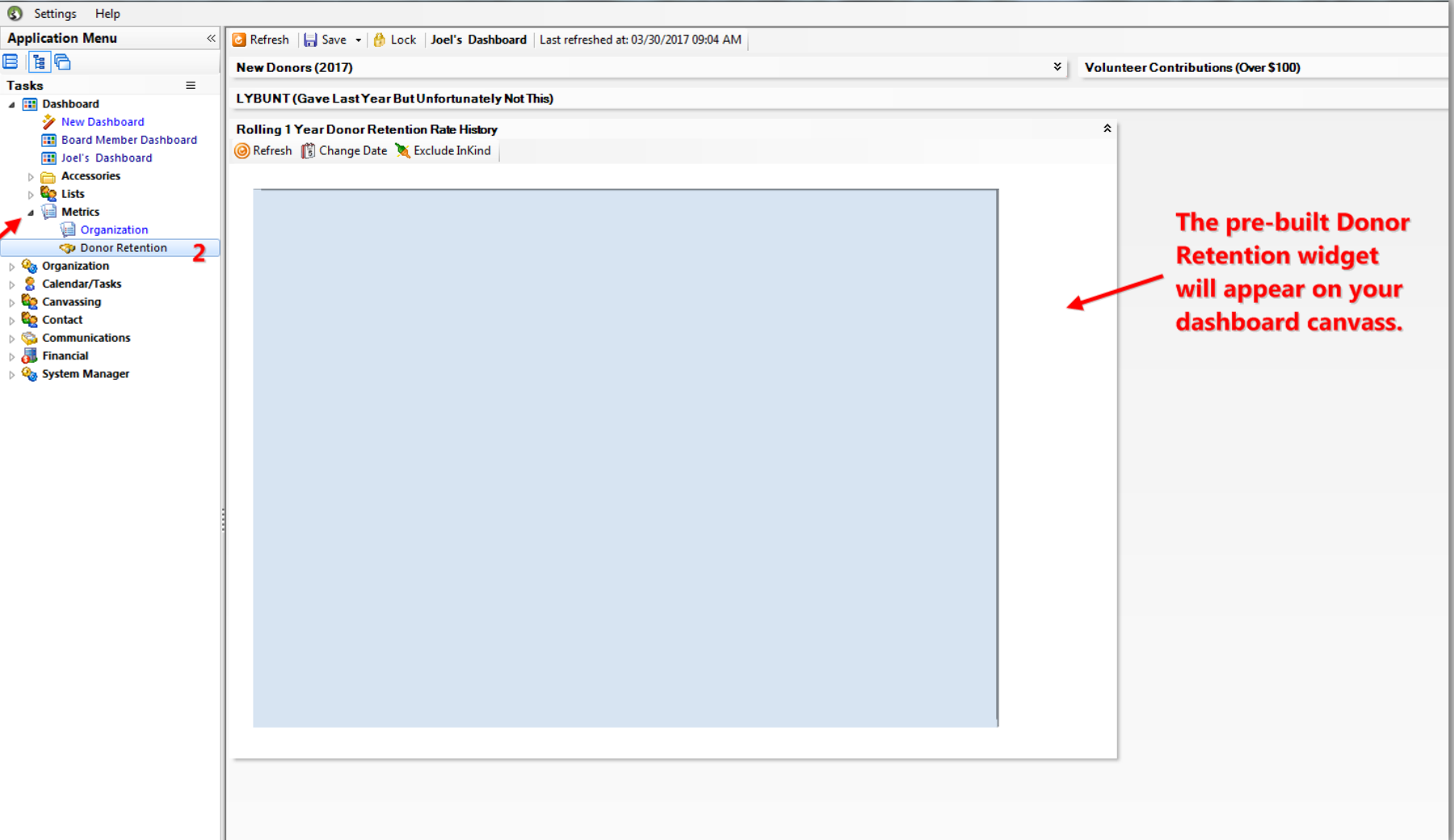
Last Name	First Name	City	St	2011 & Prior	2012	2013	2014	2015	2016	2017	Lifetime Total	Contribution Count All	How Much Might I Ask For?
	Bill & Melinda Gates Foundation	St Joseph	MN	170.00	140.00	450.00	66,000.00	20,000.00	11,900.00	.00	98,660.00	15	28,290.00
Smith	Bob	Nevis	MN	.00	.00	1,805.00	25,200.00	18,508.01	100.00	.00	45,613.01	91	2,750.00
Matthews	Elaine	Export	PA	.00	.00	.00	15,000.00	14,100.00	14,550.00	.00	43,650.00	3	14,550.00
Adams	Steven	Golden Valley	MN	.00	.00	7,600.00	13,446.00	10,000.00	9,830.00	.00	40,876.00	5	10,810.00
	Cargill	Minnetonka	MN	.00	.00	.00	10,590.00	15,550.00	11,630.00	.00	37,770.00	11	6,720.00
	Garfield Weston Foundation	La Crescent	MN	950.00	130.00	7,000.00	8,979.00	9,070.00	5,470.00	.00	31,599.00	15	5,590.00
Eastes	Zon	Anywhere	VT	.00	.00	5,000.00	9,296.00	8,740.00	7,110.00	.00	30,146.00	4	7,540.00
Rosanova	Gina	Chicago	IL	.00	.00	5,000.00	7,068.00	7,630.00	7,940.00	.00	27,638.00	4	6,910.00
	Ameriprise Financial	Saint Paul	MN	1,120.00	25,210.00	.00	.00	.00	500.00	.00	26,830.00	12	13,620.00
Laschansky	Mary	Coon Rapids	MN	.00	.00	5,000.00	7,618.00	7,240.00	6,620.00	.00	26,478.00	4	6,620.00
Smith	Cynthia	Greenville	SC	.00	.00	5,550.50	7,525.00	6,620.00	6,570.00	.00	26,265.50	4	6,570.00
Kaufmann	Nancy	New Hope	CT	.00	.00	5,775.00	7,892.00	5,500.00	4,790.00	.00	23,957.00	5	6,340.00
	Berkley First Presbyterian	Berkeley	CA	.00	.00	.00	7,000.00	7,770.00	7,390.00	.00	22,160.00	3	7,390.00
Rhodes	Constance	Franklin	TN	.00	.00	.00	.00	10,255.00	11,820.00	.00	22,075.00	2	11,040.00
Zinkel-Smith	Catherine	Minneapolis	MN	.00	.00	.00	6,000.00	6,900.00	7,800.00	.00	20,700.00	3	6,900.00
	J. Paul Getty Trust	Collegeville	MN	870.00	210.00	.00	5,000.00	5,200.00	6,360.00	.00	17,640.00	14	3,810.00
				522,895.00	204,902.67	434,571.99	999,204.40	1,106,923.39	1,204,598.42	.00	4,473,535.87	17620	1,176,180.00

The next section will show you how to use some of the **pre-defined** dashboard widgets i.e. **Donor Retention** and **Organization Metrics**, as well as how to **modify** each of these options with a variety of **pre-build metrics** that come with your **Trail Blazer** database.

#2 – Add Trail Blazer’s Predefined Metrics with Drag-and-Drop (Ex: Donor Retention & Organization Stats)

To add the **Donor Retention** report, expand the **‘Metrics’ branch**, and then **click** on the **‘Donor Retention’** branch. This will place the report on your dashboard canvass as shown below.

How to Build and Save Custom Dashboards – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (*Powerful Real-Time Reporting*) (*LONG VERSION*)



The screenshot shows the TrailBlazer application interface. On the left is the 'Application Menu' with a 'Tasks' section containing 'Dashboard', 'New Dashboard', 'Board Member Dashboard', 'Joel's Dashboard', 'Accessories', 'Lists', 'Metrics', 'Organization', and 'Donor Retention'. A red arrow labeled '1' points to the 'Organization' category, and another red arrow labeled '2' points to the 'Donor Retention' item. The main dashboard area displays several widgets: 'New Donors (2017)', 'LYBUNT (Gave Last Year But Unfortunately Not This)', and 'Rolling 1 Year Donor Retention Rate History'. The 'Rolling 1 Year Donor Retention Rate History' widget has a 'Refresh' button and a 'Change Date' button. A large blue rectangular area is present within this widget, representing a graph that is not yet displayed. A red arrow points from a text box on the right to this area. The text box contains the following text:

The pre-built Donor Retention widget will appear on your dashboard canvass.

Click the **[Refresh]** button on the Donor Retention report to **display** the **graph**.

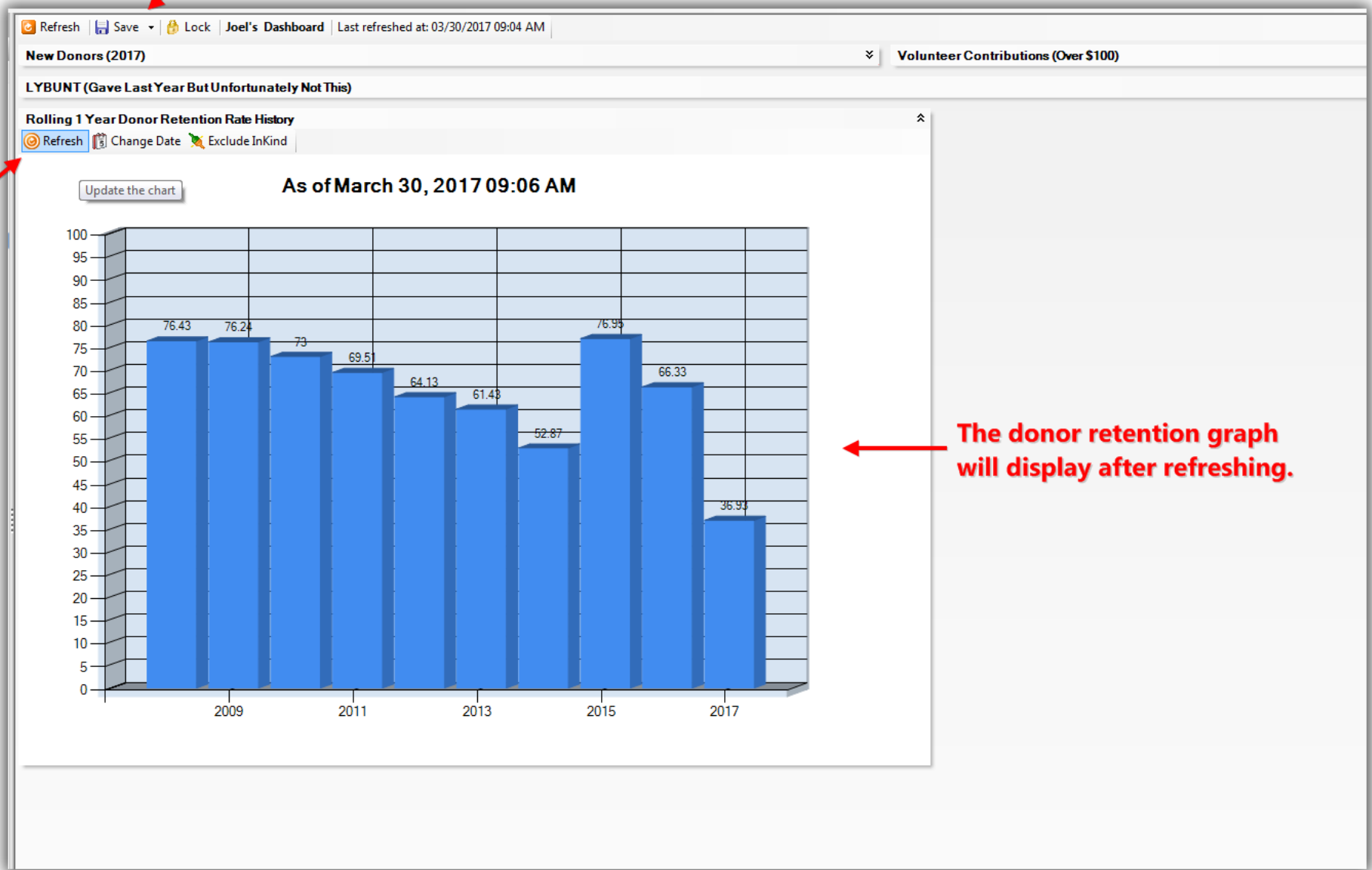
How to Build and Save **Custom Dashboards** – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (*Powerful Real-Time Reporting*) (*LONG VERSION*)

You can adjust the **size** and **placement** of the graph on the dashboard canvass, and then click **[Save]** in the upper-left once you're satisfied with the results.

How to Build and Save Custom Dashboards – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (*Powerful Real-Time Reporting*) (*LONG VERSION*)

Save as you go.

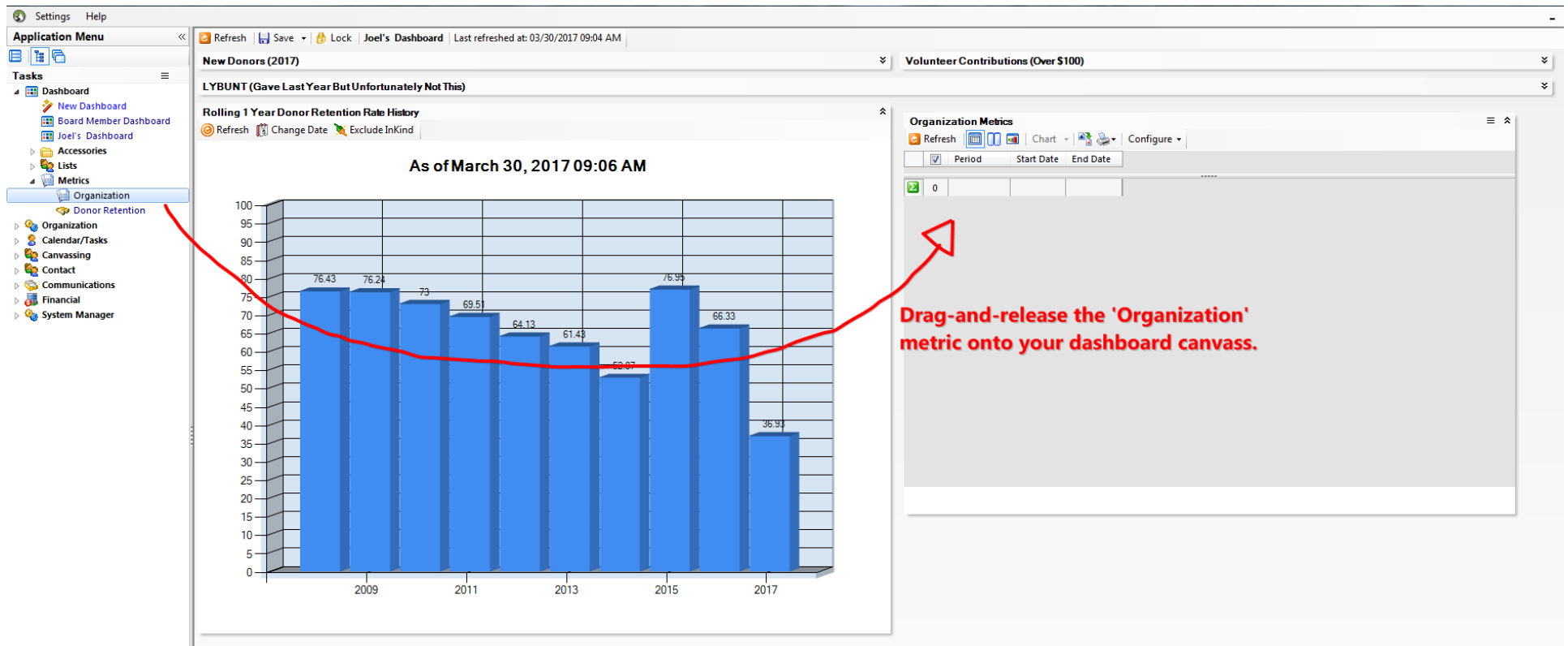
1



The donor retention graph will display after refreshing.

How to Build and Save Custom Dashboards – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (*Powerful Real-Time Reporting*) (*LONG VERSION*)

The begin adding predefined **'Organization Metrics'** click-and-drag an instance of the **'Organization'** branch onto your dashboard canvass and release it. *My example is below.*

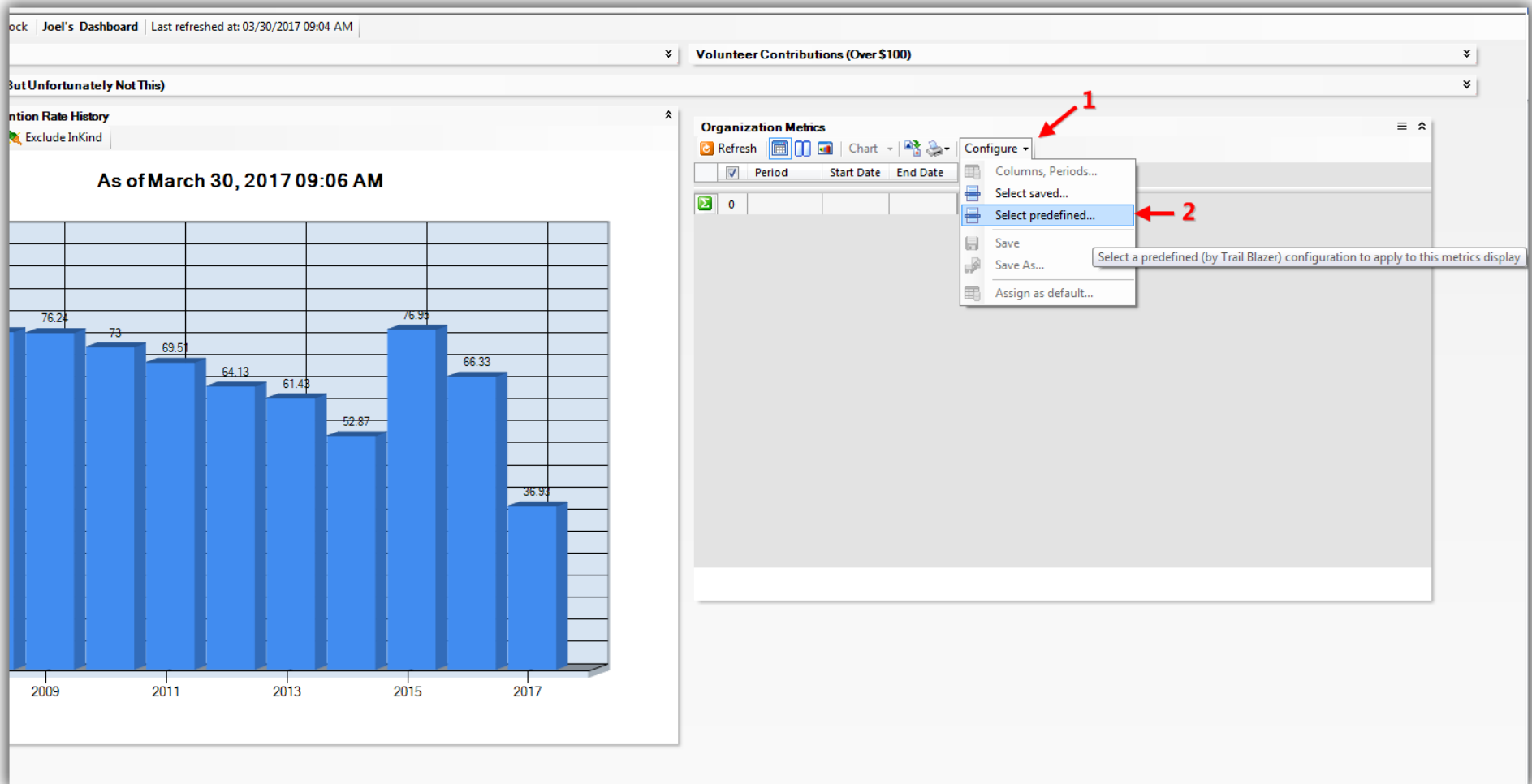


The screenshot shows a dashboard with several widgets. On the left is an 'Application Menu' with a tree view containing 'Dashboard', 'Accessories', 'Lists', 'Metrics', and 'Organization'. The 'Organization' branch is highlighted. The main dashboard area contains a bar chart titled 'Rolling 1 Year Donor Retention Rate History' with the subtitle 'As of March 30, 2017 09:06 AM'. The chart shows data for years 2009 through 2017. A red arrow points from the 'Organization' menu item to the 'Organization Metrics' widget on the right, which is currently empty and has a red arrow pointing to it with the text 'Drag-and-release the 'Organization' metric onto your dashboard canvass.'

Year	Retention Rate (%)
2009	76.43
2010	76.24
2011	73
2012	69.5
2013	64.13
2014	61.43
2015	52.07
2016	76.39
2017	66.33
2018	36.91

On your new Organization report click the **[Configure]** drop-down and select **'Select Predefined...'**.

How to Build and Save Custom Dashboards – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (*Powerful Real-Time Reporting*) (*LONG VERSION*)



Joel's Dashboard | Last refreshed at: 03/30/2017 09:04 AM

Volunteer Contributions (Over \$100)

But Unfortunately Not This

Retention Rate History

Exclude InKind

As of March 30, 2017 09:06 AM

Year	Value
2009	76.24
2010	73
2011	69.51
2012	64.13
2013	61.43
2014	52.87
2015	76.95
2016	66.33
2017	36.93

Organization Metrics

Refresh | Chart

Period | Start Date | End Date

0

Configure

- Columns, Periods...
- Select saved...
- Select predefined...
- Save
- Save As...
- Assign as default...

Select a predefined (by Trail Blazer) configuration to apply to this metrics display

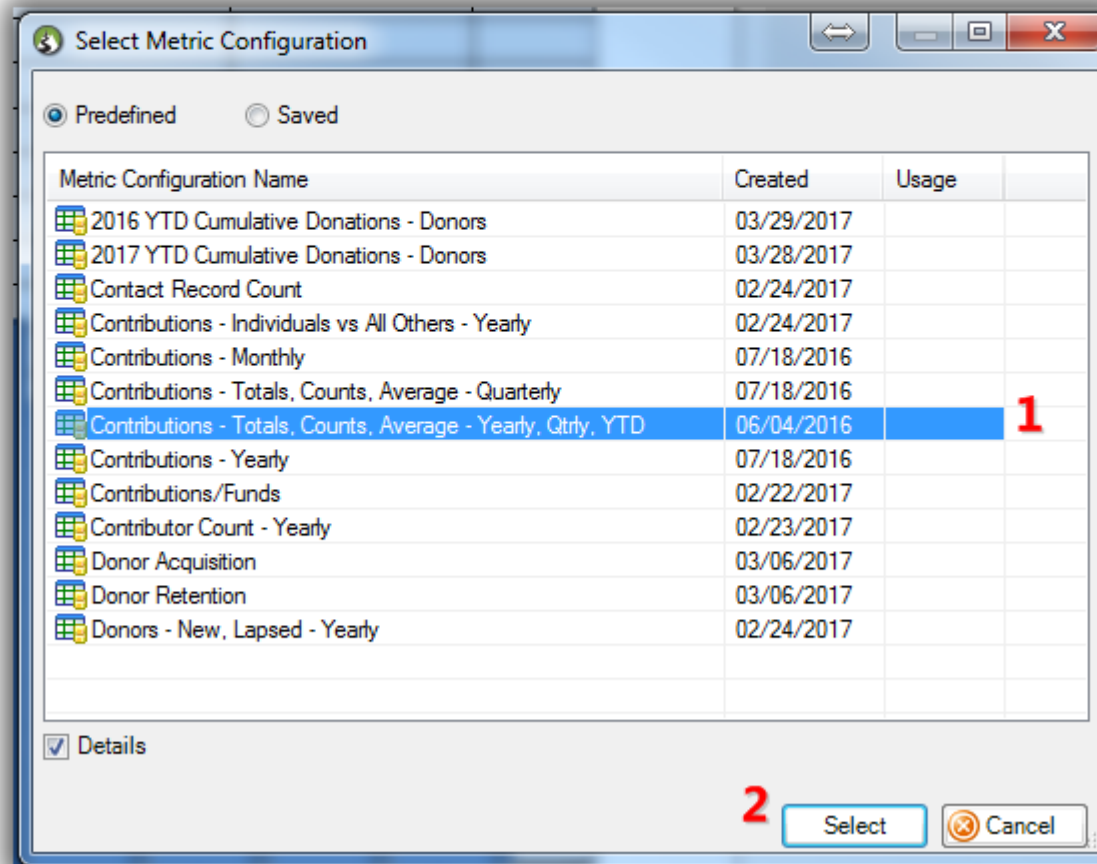
Make sure the **'Predefined'** radio button is selected, choose which **metric** you want to add, and then click **[Select]**. *You can check the box for 'Details' to see the date in which the metric was created.*

How to Build and Save **Custom Dashboards** – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (*Powerful Real-Time Reporting*) (**LONG VERSION**)

In my example I started with the oldest metric that we had which was 'Contributions – Totals, Counts, Average, Yearly, Qtrly, YTD'.

Choose from the list of predefined organization metrics.

(if you click details you can see the date that they were created)



How to Build and Save Custom Dashboards – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (Powerful Real-Time Reporting) (LONG VERSION)

Below is my *example* predefined dashboard metric in a 'grid view'. *Adjust the size and location and save as you go.*

Save as you go.

Example of a predefined org metric (widget).

The screenshot shows a dashboard interface with the following components:

- Top Bar:** Refresh, Save, Lock, Joel's Dashboard, Last refreshed at: 03/30/2017 09:04 AM
- Left Panel:**
 - New Donors (2017):** LYBUNT (Gave Last Year But Unfortunately Not This)
 - Rolling 1 Year Donor Retention Rate History:** Refresh, Change Date, Exclude InKind
 - As of March 30, 2017 09:06 AM**
 - Bar Chart:** Shows retention rates from 2009 to 2017. Values: 2009 (76.43), 2010 (76.24), 2011 (73), 2012 (69.51), 2013 (64.13), 2014 (61.43), 2015 (52.87), 2016 (76.95), 2017 (66.33), 2018 (36.94).
- Right Panel:**
 - Volunteer Contributions (Over \$100):** Contributions - Totals, Counts, Average - Yearly, Qtrly, YTD
 - Table:**

<input checked="" type="checkbox"/>	Period	Start Date	End Date	Contribution Total	Number Contributions	Average Contribution	Contributor Count	New Contributor Count
<input checked="" type="checkbox"/>	YTD two years ago	1/1/2015	3/30/2015	455,895.89	1,352	337.20	1,170	133
<input checked="" type="checkbox"/>	YTD last year	1/1/2016	3/30/2016	516,284.07	1,219	423.53	1,191	98
<input checked="" type="checkbox"/>	YTD	1/1/2017	3/30/2017	33,722.04	120	281.02	108	92
<input checked="" type="checkbox"/>	2014	1/1/2014	12/31/2014	1,260,522.35	4,175	301.92	3,198	604
<input checked="" type="checkbox"/>	2015	1/1/2015	12/31/2015	1,206,775.87	3,985	302.83	3,088	352
<input checked="" type="checkbox"/>	2016	1/1/2016	12/31/2016	1,227,358.53	2,978	412.14	2,899	358
<input checked="" type="checkbox"/>	Qtr 1 2014	1/1/2014	3/31/2014	340,506.22	1,212	280.95	1,056	162
<input checked="" type="checkbox"/>	Qtr 1 2015	1/1/2015	3/31/2015	460,131.89	1,370	335.86	1,185	134
<input checked="" type="checkbox"/>	Qtr 1 2016	1/1/2016	3/31/2016	527,289.43	1,238	425.92	1,210	101
<input checked="" type="checkbox"/>	Qtr 2 2014	4/1/2014	6/30/2014	311,602.49	979	318.29	838	118
<input checked="" type="checkbox"/>	Qtr 2 2015	4/1/2015	6/30/2015	323,362.76	1,063	304.20	972	115
<input checked="" type="checkbox"/>	Qtr 2 2016	4/1/2016	6/30/2016	460,132.17	1,136	405.05	1,121	96
<input checked="" type="checkbox"/>	Qtr 3 2014	7/1/2014	9/30/2014	295,825.81	787	375.89	659	106
<input checked="" type="checkbox"/>	Qtr 3 2015	7/1/2015	9/30/2015	239,348.45	674	355.12	647	29
<input checked="" type="checkbox"/>	Qtr 3 2016	7/1/2016	9/30/2016	167,253.20	386	433.30	376	73
<input checked="" type="checkbox"/>	Qtr 4 2014	10/1/2014	12/31/2014	312,587.83	1,197	261.14	1,032	218
<input checked="" type="checkbox"/>	Qtr 4 2015	10/1/2015	12/31/2015	183,932.77	878	209.49	499	74
<input checked="" type="checkbox"/>	Qtr 4 2016	10/1/2016	12/31/2016	72,683.73	218	333.41	210	88
<input checked="" type="checkbox"/>	18			8,395,215.50	24,967	6,097.26	21,459	2,951

How to Build and Save **Custom Dashboards** – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (*Powerful Real-Time Reporting*) (**LONG VERSION**)

You can toggle the **view** of the metrics to **grid**, **split screen (grid and graph)**, and **graph**. You can also **collapse** the different widgets you put onto your dashboard by using the **collapse** button. *My example is below of a metric shown in split screen mode along with a variety of others that are collapsed.*

How to Build and Save Custom Dashboards – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (Powerful Real-Time Reporting) (LONG VERSION)

Toggle between grid, split, and graph displays.

Collapse and expand different metric displays.

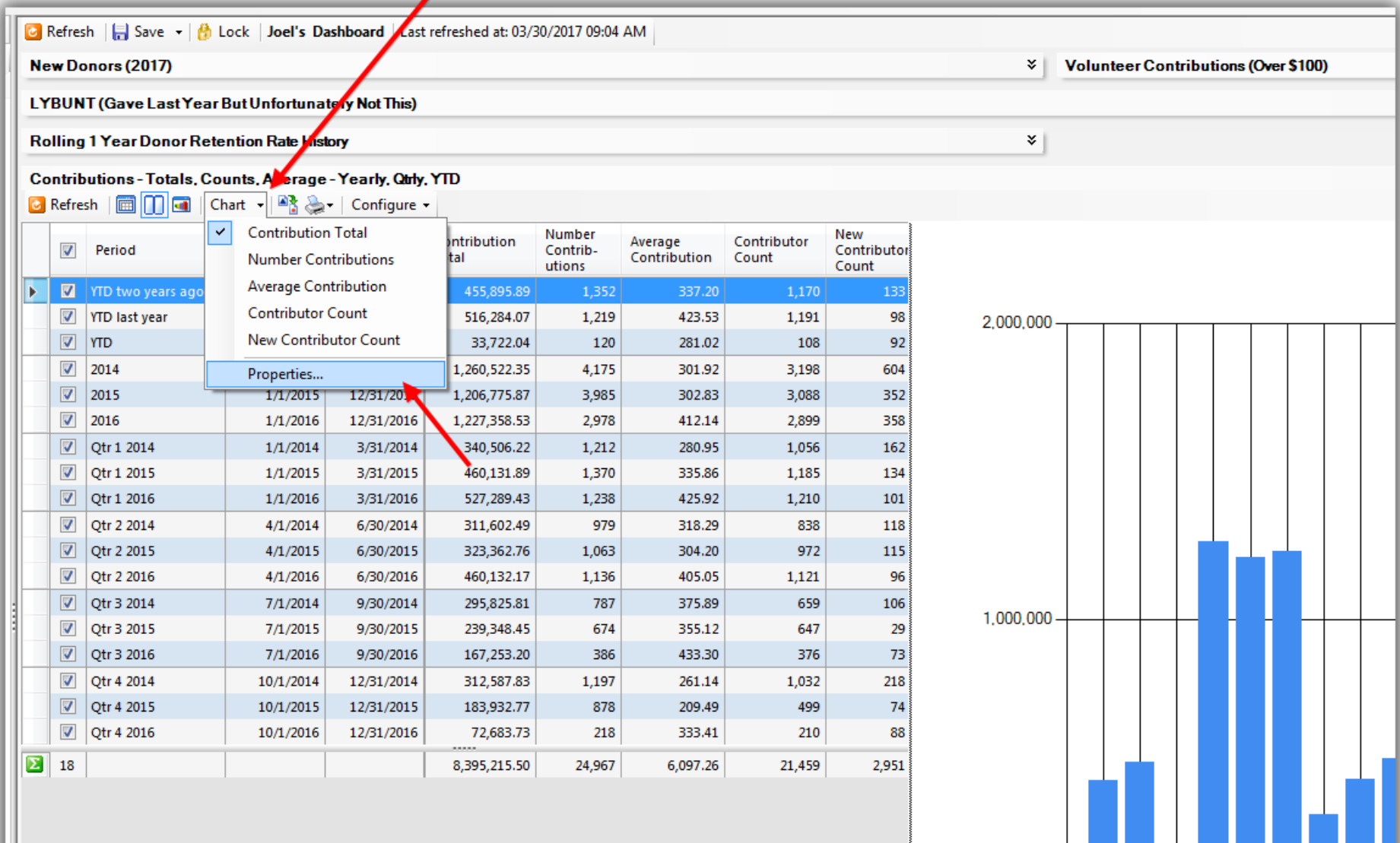
The dashboard displays the following data in a table:

Period	Start Date	End Date	Contribution Total	Number Contributions	Average Contribution	Contributor Count	New Contributor Count
YTD two years ago	1/1/2015	3/30/2015	455,895.89	1,352	337.20	1,170	133
YTD last year	1/1/2016	3/30/2016	516,284.07	1,219	423.53	1,191	98
YTD	1/1/2017	3/30/2017	33,722.04	120	281.02	108	92
2014	1/1/2014	12/31/2014	1,260,522.35	4,175	301.92	3,198	604
2015	1/1/2015	12/31/2015	1,206,775.87	3,985	302.83	3,088	352
2016	1/1/2016	12/31/2016	1,227,358.53	2,978	412.14	2,899	358
Qtr 1 2014	1/1/2014	3/31/2014	340,506.22	1,212	280.95	1,056	162
Qtr 1 2015	1/1/2015	3/31/2015	460,131.89	1,370	335.86	1,185	134
Qtr 1 2016	1/1/2016	3/31/2016	527,289.43	1,238	425.92	1,210	101
Qtr 2 2014	4/1/2014	6/30/2014	311,602.49	979	318.29	838	118
Qtr 2 2015	4/1/2015	6/30/2015	323,362.76	1,063	304.20	972	115
Qtr 2 2016	4/1/2016	6/30/2016	460,132.17	1,136	405.05	1,121	96
Qtr 3 2014	7/1/2014	9/30/2014	295,825.81	787	375.89	659	106
Qtr 3 2015	7/1/2015	9/30/2015	239,348.45	674	355.12	647	29
Qtr 3 2016	7/1/2016	9/30/2016	167,253.20	386	433.30	376	73
Qtr 4 2014	10/1/2014	12/31/2014	312,587.83	1,197	261.14	1,032	218
Qtr 4 2015	10/1/2015	12/31/2015	183,932.77	878	209.49	499	74
Qtr 4 2016	10/1/2016	12/31/2016	72,683.73	218	333.41	210	88
Total			8,395,215.50	24,967	6,097.26	21,459	2,951

The bar chart displays the Contribution Total for each period, with the highest values for 2014 and 2015. The chart is titled 'Contribution Total' and shows a clear trend of higher contributions in the earlier years.

You can configure the metrics further, such as selecting which **graph** will display. To change the graph click on the **[Chart] drop-down** and select **'Properties...'**.

1. Configure metrics further by clicking the [Chart] drop-down and selecting from the options on the context menu. If you click the 'Properties' option you'll be able to choose from different types of graphs.

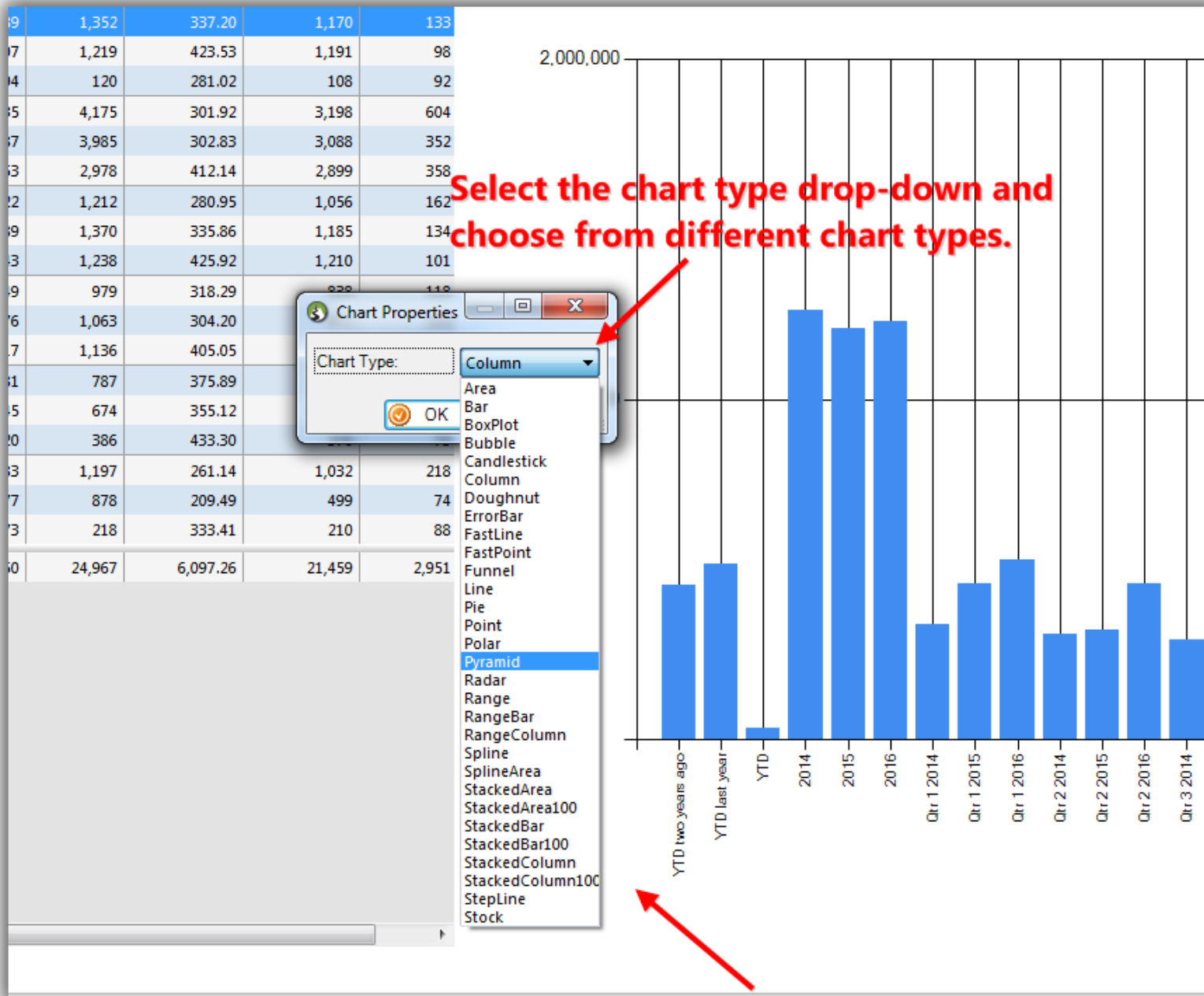


The screenshot shows a dashboard titled "Joel's Dashboard" with a "New Donors (2017)" widget. The widget displays a table of "Contributions - Totals, Counts, Average - Yearly, Qtrly, YTD" for "Volunteer Contributions (Over \$100)". A context menu is open over the table, showing options for "Contribution Total", "Number Contributions", "Average Contribution", "Contributor Count", "New Contributor Count", and "Properties...". A red arrow points from the "Chart" dropdown menu to the "Properties..." option. To the right of the table, a bar chart is partially visible, showing data for various periods.

Period	Contribution Total	Number Contributions	Average Contribution	Contributor Count	New Contributor Count
YTD two years ago	455,895.89	1,352	337.20	1,170	133
YTD last year	516,284.07	1,219	423.53	1,191	98
YTD	33,722.04	120	281.02	108	92
2014	1,260,522.35	4,175	301.92	3,198	604
2015	1,206,775.87	3,985	302.83	3,088	352
2016	1,227,358.53	2,978	412.14	2,899	358
Qtr 1 2014	340,506.22	1,212	280.95	1,056	162
Qtr 1 2015	460,131.89	1,370	335.86	1,185	134
Qtr 1 2016	527,289.43	1,238	425.92	1,210	101
Qtr 2 2014	311,602.49	979	318.29	838	118
Qtr 2 2015	323,362.76	1,063	304.20	972	115
Qtr 2 2016	460,132.17	1,136	405.05	1,121	96
Qtr 3 2014	295,825.81	787	375.89	659	106
Qtr 3 2015	239,348.45	674	355.12	647	29
Qtr 3 2016	167,253.20	386	433.30	376	73
Qtr 4 2014	312,587.83	1,197	261.14	1,032	218
Qtr 4 2015	183,932.77	878	209.49	499	74
Qtr 4 2016	72,683.73	218	333.41	210	88
Total	8,395,215.50	24,967	6,097.26	21,459	2,951

Select which **chart/graph** you want from the drop-down menu. *In my example I selected the **Pyramid** graph.*

How to Build and Save Custom Dashboards – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (*Powerful Real-Time Reporting*) (*LONG VERSION*)



You can also swap between the different preconfigured **'chart' displays** by clicking directly on the **[Chart]** button as shown below.

How to Build and Save Custom Dashboards – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (Powerful Real-Time Reporting) (LONG VERSION)

If you click the [Chart] button you can toggle through different types of stats for the particular org metric you selected.

Example of a different type of graph for an org metric.

Refresh Save Lock Joel's Dashboard Last refreshed at: 03/30/2017 09:04 AM

New Donors (2017) ⌵
Volunteer Contributions (Over \$100) ⌵

LYBUNT (Gave Last Year But Unfortunately Not This) ⌵

Rolling 1 Year Donor Retention Rate History ⌵

Contributions - Totals, Count, Average - Yearly, Qtrly, YTD
⌵ ⌶

Refresh
⌵
Chart
⌵
Configure
⌵

<input type="checkbox"/>	Period	Start Date	End Date	Contribution Total	Number Contributions	Average Contribution	Contributor Count	New Contributor Count
<input checked="" type="checkbox"/>	YTD two years ago	1/1/2015	3/30/2015	455,895.89	1,352	337.20	1,170	133
<input checked="" type="checkbox"/>	YTD last year	1/1/2016	3/30/2016	516,284.07	1,219	423.53	1,191	98
<input checked="" type="checkbox"/>	YTD	1/1/2017	3/30/2017	33,722.04	120	281.02	108	92
<input checked="" type="checkbox"/>	2014	1/1/2014	12/31/2014	1,260,522.35	4,175	301.92	3,198	604
<input checked="" type="checkbox"/>	2015	1/1/2015	12/31/2015	1,206,775.87	3,985	302.83	3,088	352
<input checked="" type="checkbox"/>	2016	1/1/2016	12/31/2016	1,227,358.53	2,978	412.14	2,899	358
<input checked="" type="checkbox"/>	Qtr 1 2014	1/1/2014	3/31/2014	340,506.22	1,212	280.95	1,056	162
<input checked="" type="checkbox"/>	Qtr 1 2015	1/1/2015	3/31/2015	460,131.89	1,370	335.86	1,185	134
<input checked="" type="checkbox"/>	Qtr 1 2016	1/1/2016	3/31/2016	527,289.43	1,238	425.92	1,210	101
<input checked="" type="checkbox"/>	Qtr 2 2014	4/1/2014	6/30/2014	311,602.49	979	318.29	838	118
<input checked="" type="checkbox"/>	Qtr 2 2015	4/1/2015	6/30/2015	323,362.76	1,063	304.20	972	115
<input checked="" type="checkbox"/>	Qtr 2 2016	4/1/2016	6/30/2016	460,132.17	1,136	405.05	1,121	96
<input checked="" type="checkbox"/>	Qtr 3 2014	7/1/2014	9/30/2014	295,825.81	787	375.89	659	106
<input checked="" type="checkbox"/>	Qtr 3 2015	7/1/2015	9/30/2015	239,348.45	674	355.12	647	29
<input checked="" type="checkbox"/>	Qtr 3 2016	7/1/2016	9/30/2016	167,253.20	386	433.30	376	73
<input checked="" type="checkbox"/>	Qtr 4 2014	10/1/2014	12/31/2014	312,587.83	1,197	261.14	1,032	218
<input checked="" type="checkbox"/>	Qtr 4 2015	10/1/2015	12/31/2015	183,932.77	878	209.49	499	74
<input checked="" type="checkbox"/>	Qtr 4 2016	10/1/2016	12/31/2016	72,683.73	218	333.41	210	88
<input checked="" type="checkbox"/>	18			8,395,215.50	24,967	6,097.26	21,459	2,951

How to Build and Save **Custom Dashboards** – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (*Powerful Real-Time Reporting*) (**LONG VERSION**)

Continue dragging the different **organization** metrics onto your dashboard canvass, configure them as desired, modify the height/width, and click **[Save]** as you go. My *finished example* is below.

How to Build and Save Custom Dashboards – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (Powerful Real-Time Reporting) (LONG VERSION)

Refresh Save Lock Joel's Dashboard Last refreshed at: 03/30/2017 09:04 AM

New Donors (2017)

LYBUNT (Gave Last Year But Unfortunately Not This)

Rolling 1 Year Donor Retention Rate History

Contributions - Totals, Counts, Average - Yearly, Qtrly, YTD

Donors - New, Lapsed - Yearly

Period	Donors	New Donors	Lapsed
2010	1,728	215	114
2011	2,468	761	80
2012	2,783	825	615
2013	3,164	1,144	1,029
2014	3,198	604	791
2015	3,088	352	546
2016	2,897	358	597
2017	108	92	2,883
Total	19,434	4,351	6,655

Volunteer Contributions (Over \$100)

2017 YTD Cumulative Donations - Donors

Period	YTD Contribution	YTD Unique Donors	Cumulative # Donations	Average Donation	Cumulative New Donors
Jan 2017	8,387.33	46	53	158.25	35
Feb 2017	16,577.87	72	79	209.85	59
Mar 2017	33,722.04	108	120	281.02	92
Apr 2017	33,722.04	108	120	281.02	92
May 2017	33,722.04	108	120	281.02	92
Jun 2017	33,722.04	108	120	281.02	92
Jul 2017	33,722.04	108	120	281.02	92
Aug 2017	33,722.04	108	120	281.02	92
Sep 2017	33,722.04	108	120	281.02	92
Oct 2017	33,722.04	108	120	281.02	92
Nov 2017	33,722.04	108	120	281.02	92
Dec 2017	33,722.04	108	120	281.02	92
Total	362,185.60	1,198	1,332	3,178.30	1,014

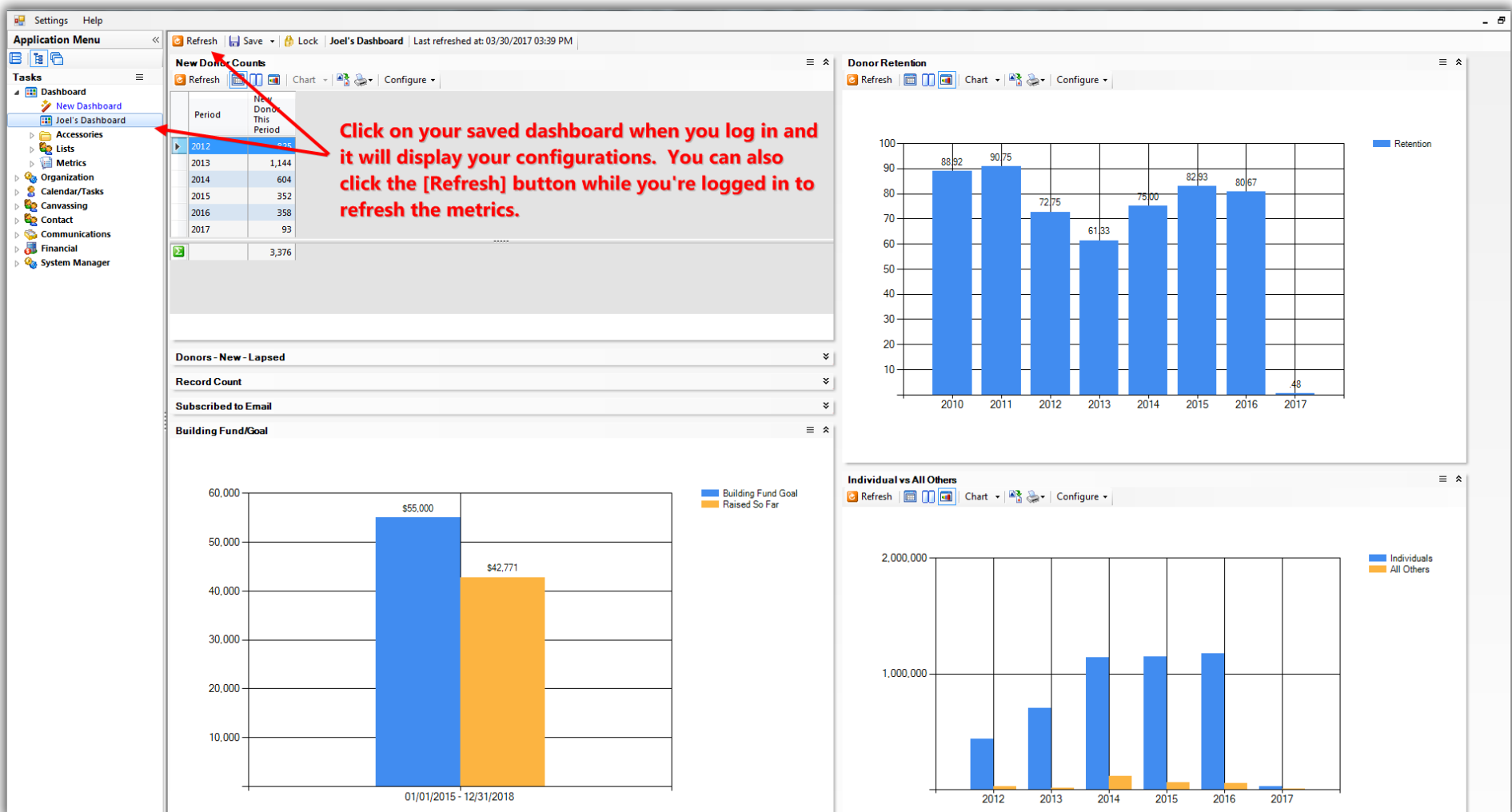
Contact Record Count

Period	Contact Record Count
01/01/1980...	12,671
Total	12,671

Continue adding and configuring org metric predefined widgets onto your dashboard and save as you go. Rearrange and resize them as needed.

How to Build and Save Custom Dashboards – Adding Graphs, Lists, and Pre-Defined Metrics (Widgets) – (Powerful Real-Time Reporting) (LONG VERSION)

The next time you **log into** your database you can **click** on your **saved dashboard(s)** under the **Application** menu and your metrics will refresh. You can also click the **[Refresh]** button periodically while you're logged in. *My example is below.*



Click on your saved dashboard when you log in and it will display your configurations. You can also click the [Refresh] button while you're logged in to refresh the metrics.

New Donor Counts

Period	New Donors This Period
2012	1,144
2013	604
2014	352
2015	358
2016	93
	3,376

Donor Retention

Year	Retention
2010	88.92
2011	90.75
2012	72.75
2013	61.33
2014	75.00
2015	82.93
2016	80.67
2017	4.8

Building Fund/Goal

Category	Value
Building Fund Goal	\$55,000
Raised So Far	\$42,771

Individual vs All Others

Year	Individuals	All Others
2012	~500,000	~100,000
2013	~700,000	~100,000
2014	~1,100,000	~200,000
2015	~1,100,000	~200,000
2016	~1,100,000	~200,000
2017	~100,000	~100,000

The **related resources** below link to a variety of other useful videos and articles related to this topic. Let us know if you can't figure out how to build a specific dashboard report or if you have suggestions for others we should provide out of the box.



Trail Blazer™

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

Related Resources

Article: [Creating Formats](#)

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☎ **Phone:** 1-866-909-8700

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