How to Add and Remove Allocation Funds to your Online Donation Form, and to the Drop-Down Menus in your Database

Author: Joel Kristenson
Last Updated: 2016-04-28

Overview

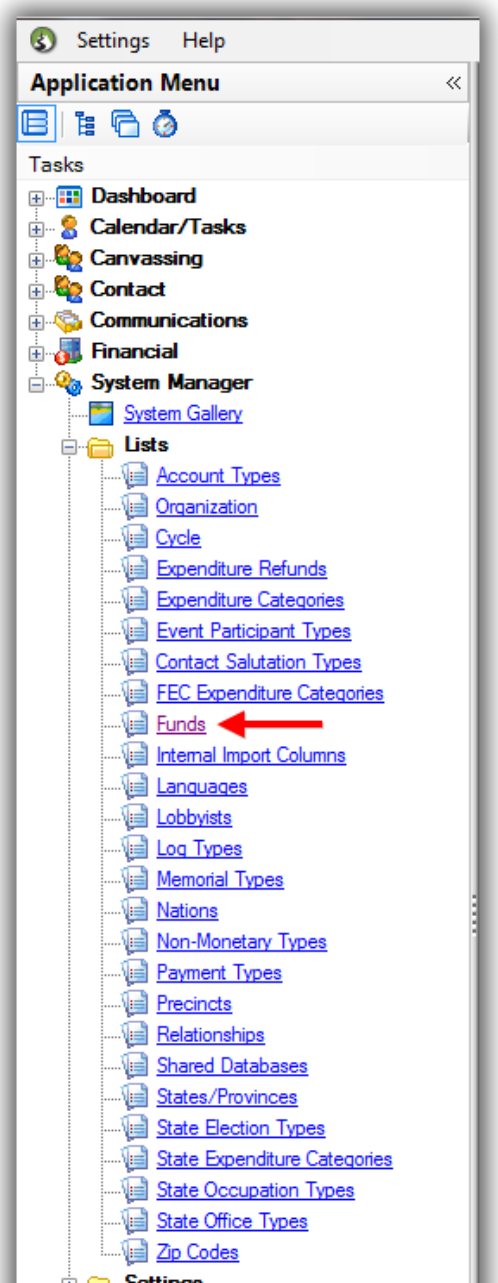
This article walks through the steps to **create new** restricted **allocation funds**, and how to both **add/remove** them to your online **donation iFrame form** as well as the **drop-down menus** in your **Trail Blazer** database.

💡 **Tip:** Funds show where the money is going, 'events' show where the money is coming from.

Steps – Adding/Removing Allocation Funds in your Database, and Making them Display on your Online Donation Form and in the Drop-Downs within the Database

Note: This task requires system administrative access.

To view your current list of allocation funds navigate to the **'Funds'** list by following **Application Menu** > **System Manger** > **Lists** > **Funds**.


Settings
Help
Application Menu
Tasks
Dashboard
Calendar/Tasks
Canvassing
Contact
Communications
Financial
System Manager
System Gallery
Lists
Account Types
Organization
Cycle
Expenditure Refunds
Expenditure Categories
Event Participant Types
Contact Salutation Types
FEC Expenditure Categories
Funds
Internal Import Columns
Languages
Lobbyists
Log Types
Memorial Types
Nations
Non-Monetary Types
Payment Types
Precincts
Relationships
Shared Databases
States/Provinces
State Election Types
State Expenditure Categories
State Occupation Types
State Office Types
Zip Codes

This will auto-populate with all the funds you currently have in your database and display which one's are **Active (Show in Drop-Downs)** & which ones are currently **Showing on your Donation Form**. *In my example I had 21 funds.*

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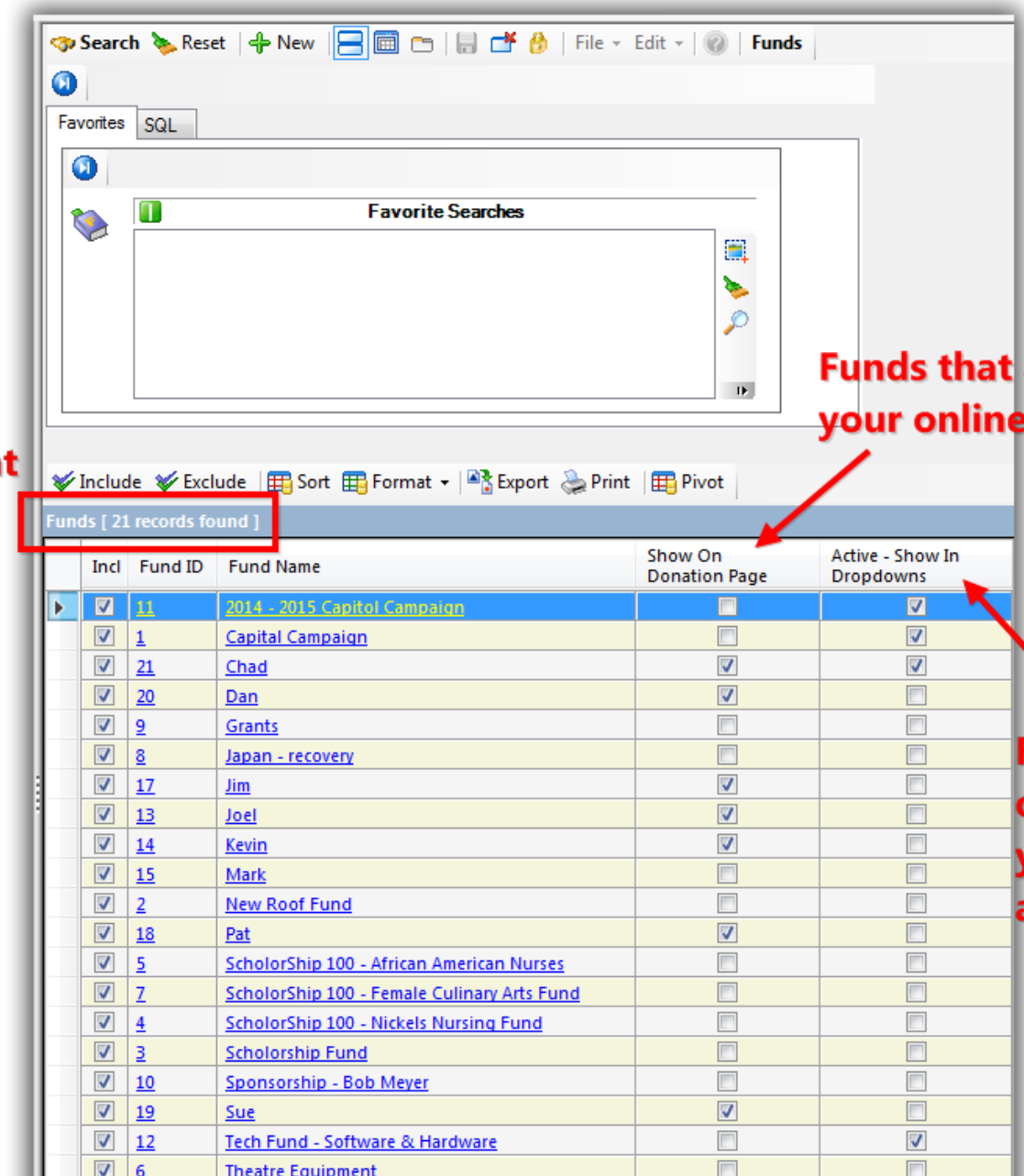
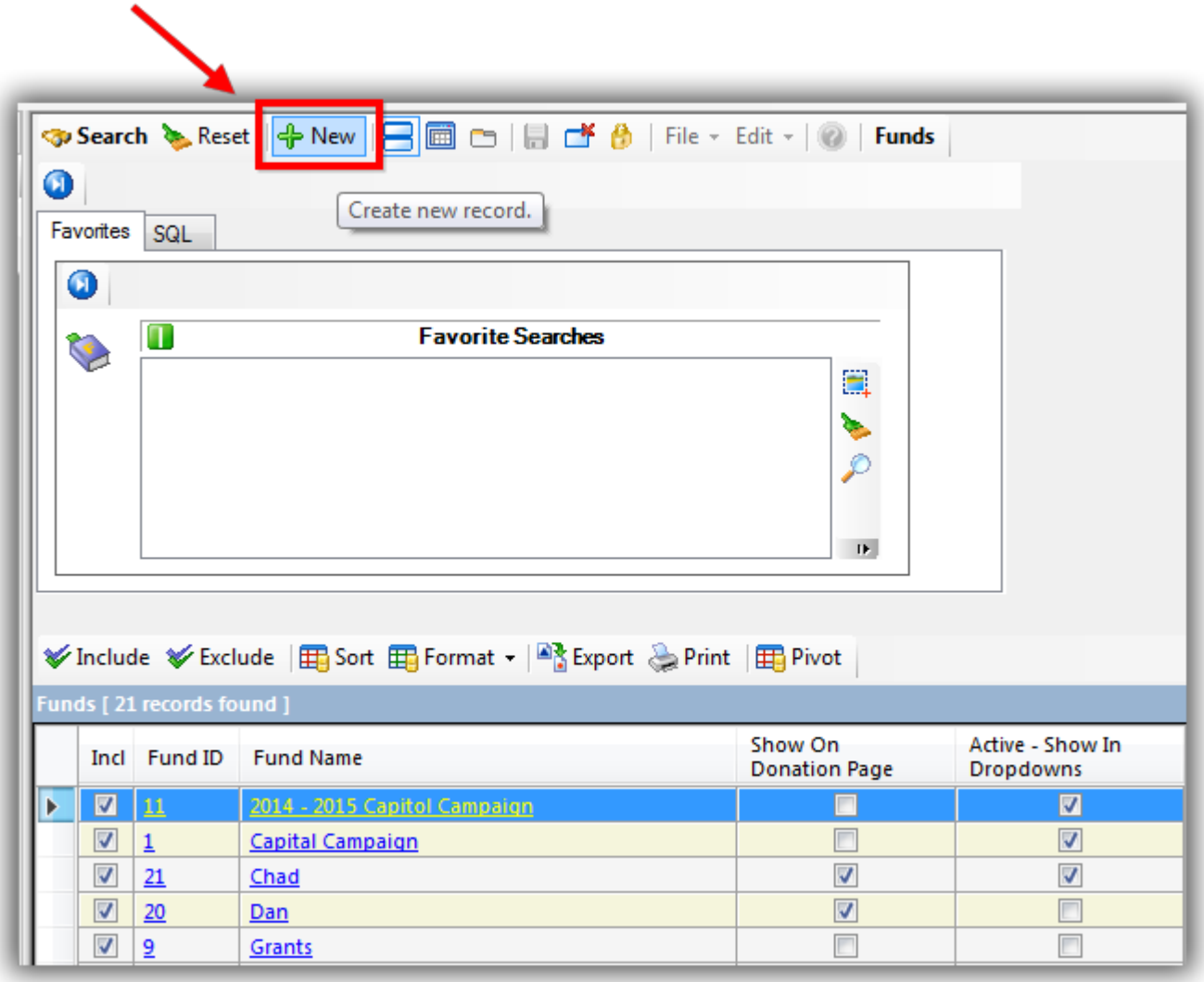


Count

Funds that are currently active on your online donation page.

Funds that are currently an option on the drop-down menus within your database (ex: when entering a new contribution record).

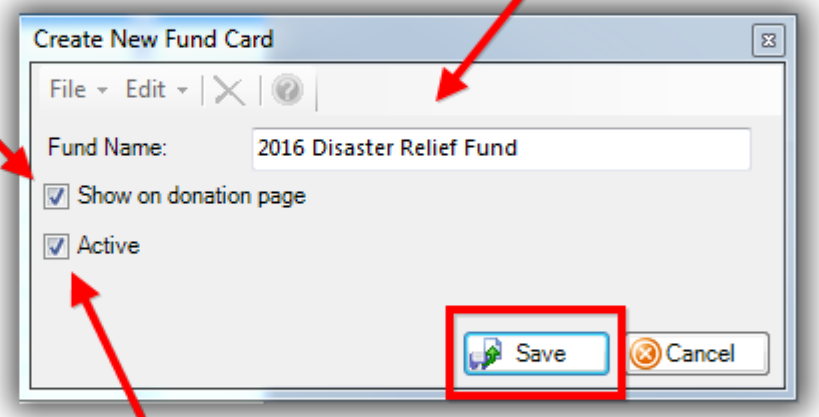
Click the **green** **[+ New]** button on the search tool strip to begin creating a new fund.


Search
Reset
New
File
Edit
Funds
Create new record.
Favorites
SQL
Favorite Searches
Include
Exclude
Sort
Format
Export
Print
Pivot
Funds [21 records found]
Incl
Fund ID
Fund Name
Show On Donation Page
Active - Show In Dropdowns
11
2014 - 2015 Capitol Campaign
1
Capital Campaign
21
Chad
20
Dan
9
Grants

Create a **name**, check the corresponding boxes if you want the fund to show on your **online donation form** and/or in the **drop-down menus** in your database, and click **[Save]**. *In my example I called '2016 Disaster Relief Fund' and I checked both boxes to make it show online as well as in the drop-downs in the database.*

Check this box *if you want the fund to show on your online donation form as an option.

Create a name for your allocation fund.



Check this box if you want the fund to show in drop-down menus within the database.

Click **[Search]** to refresh your list which will display your new fund. Click on the **'Fund ID'** column twice to sort in descending order to quickly show the most recent fund at the top.

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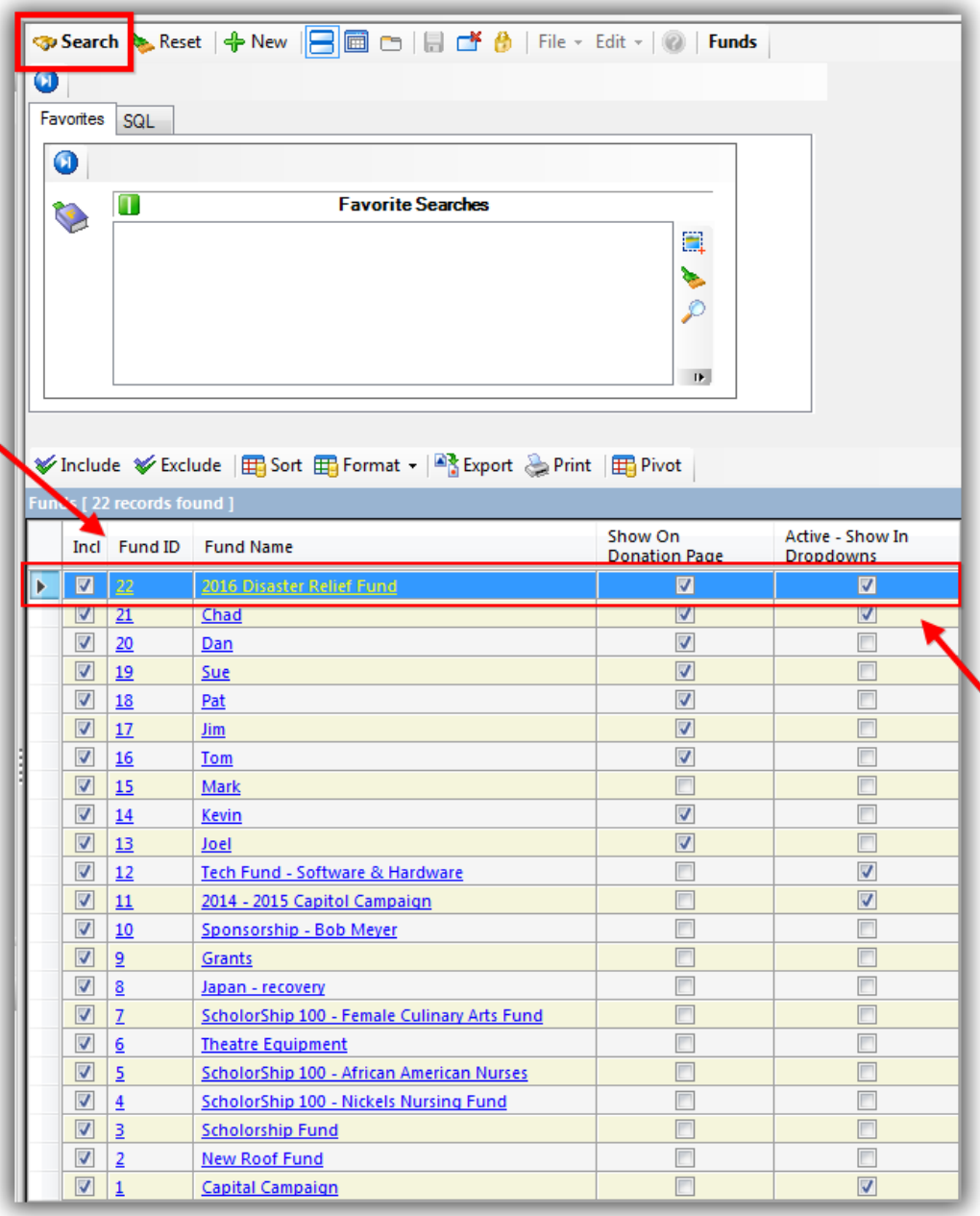
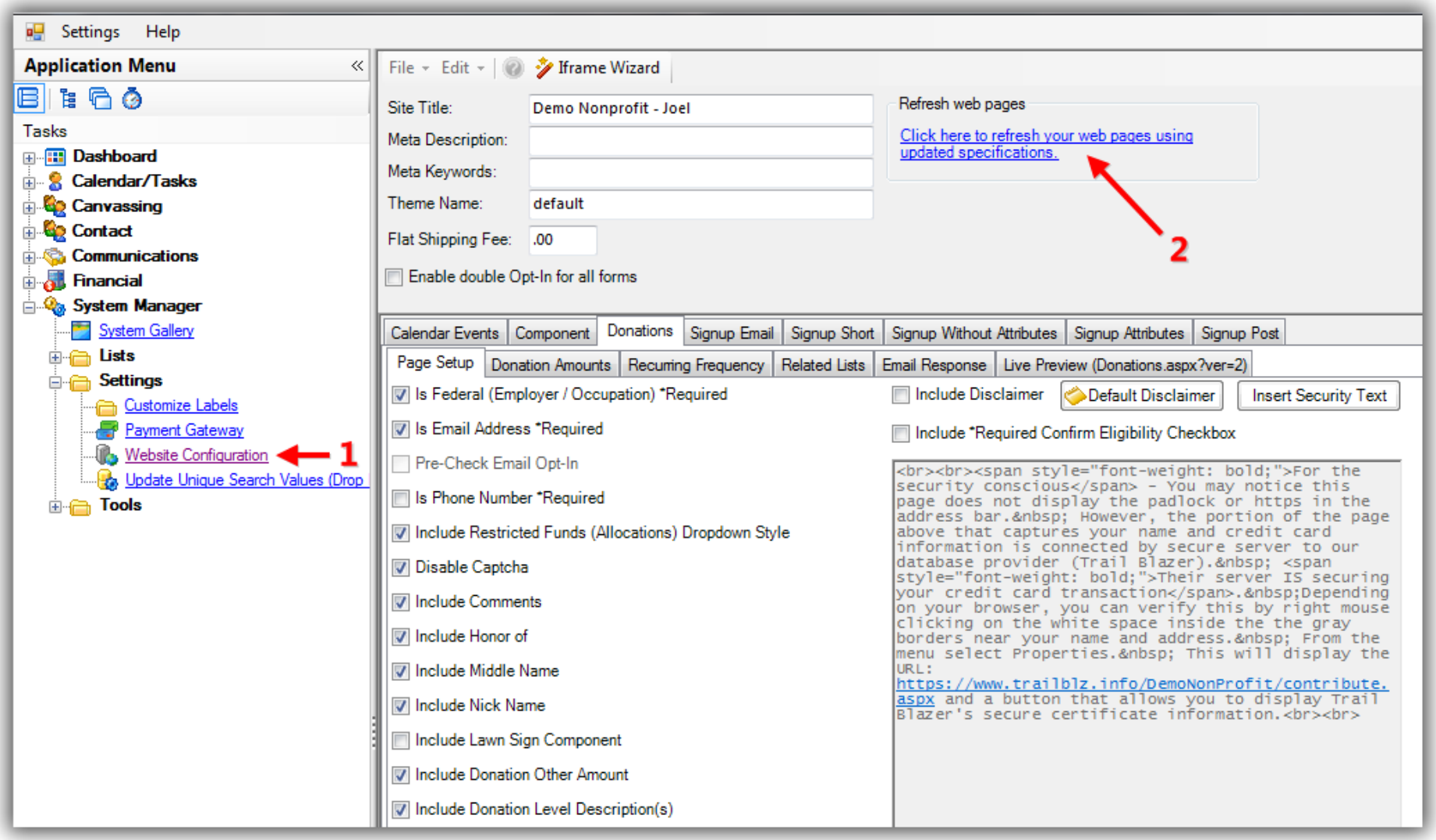
Click on the 'ID' column twice to sort in descending order to put your most recent fund at the top of the list.



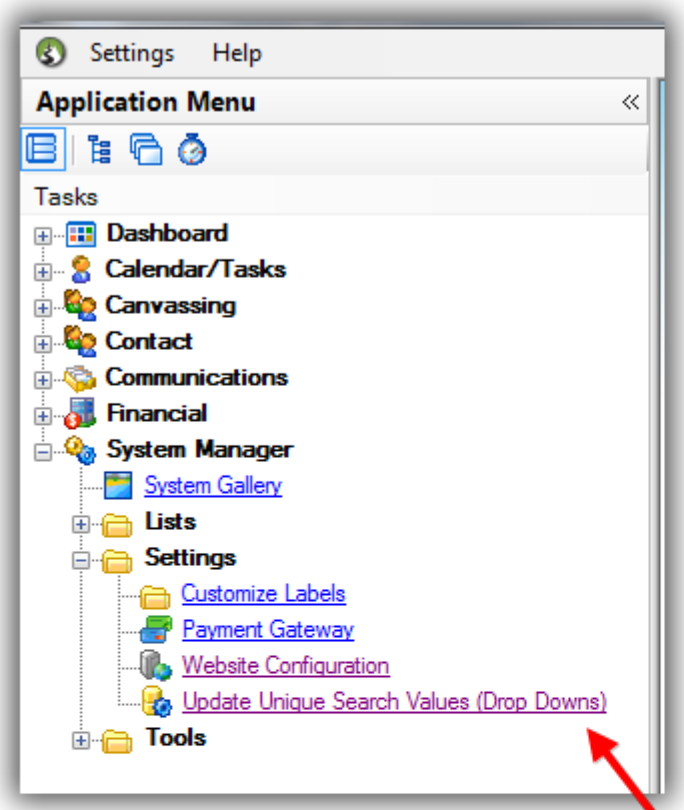
Your new fund will display in the list after clicking [Search]. You can open it again if further changes are required.

To get the fund to display on your online donation form, navigate to website configuration and click the blue link in the top-right to refresh your website settings.

Refreshing website settings after funds are added/removed from the online donation form.

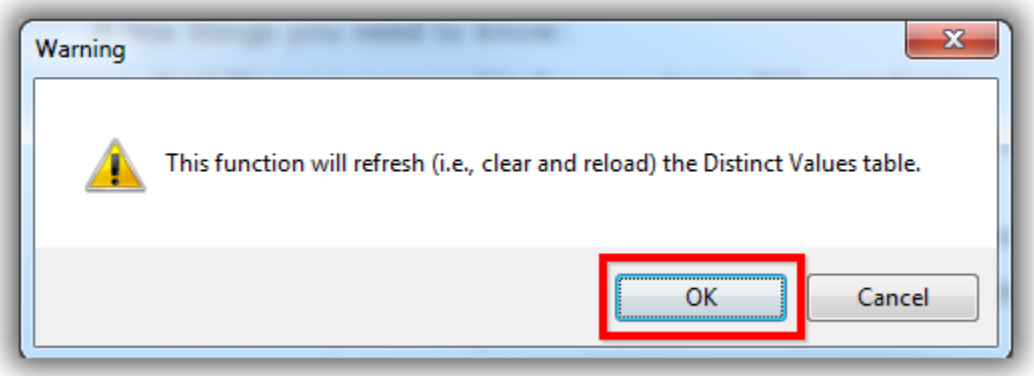


If you selected to have the fund show in the drop-down lists in our database by checking the 'Active' box, you'll want to refresh the drop-down lists by clicking the link under 'System Manager':

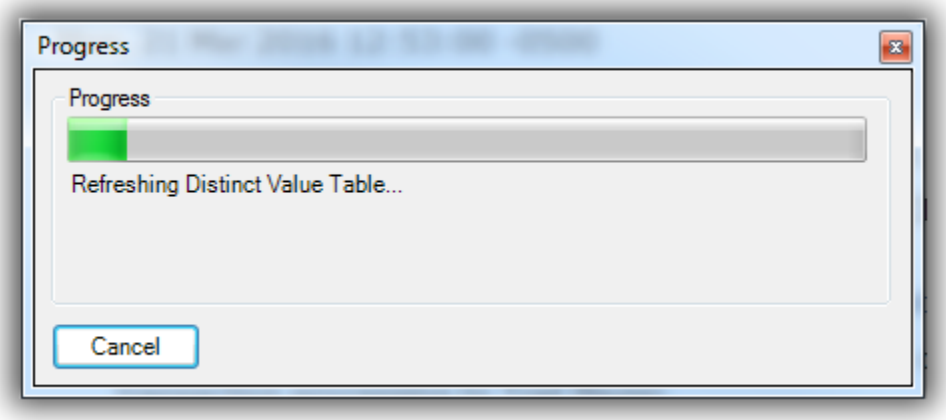


Click this link to update the unique search value (drop-downs) in your database. May take longer if you have a large database and if it hasn't been run in awhile.

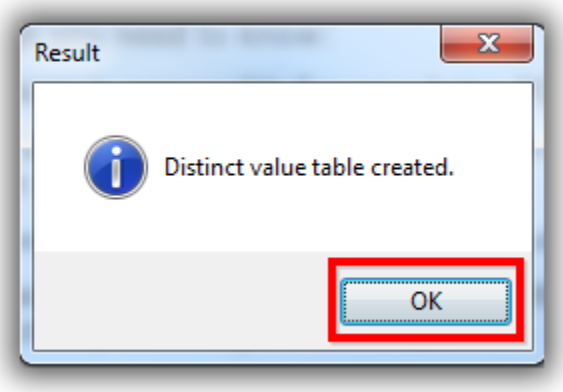
Click **[OK]** to proceed. This could take quite a while if you haven't ran this utility for a while or if you have a large database.



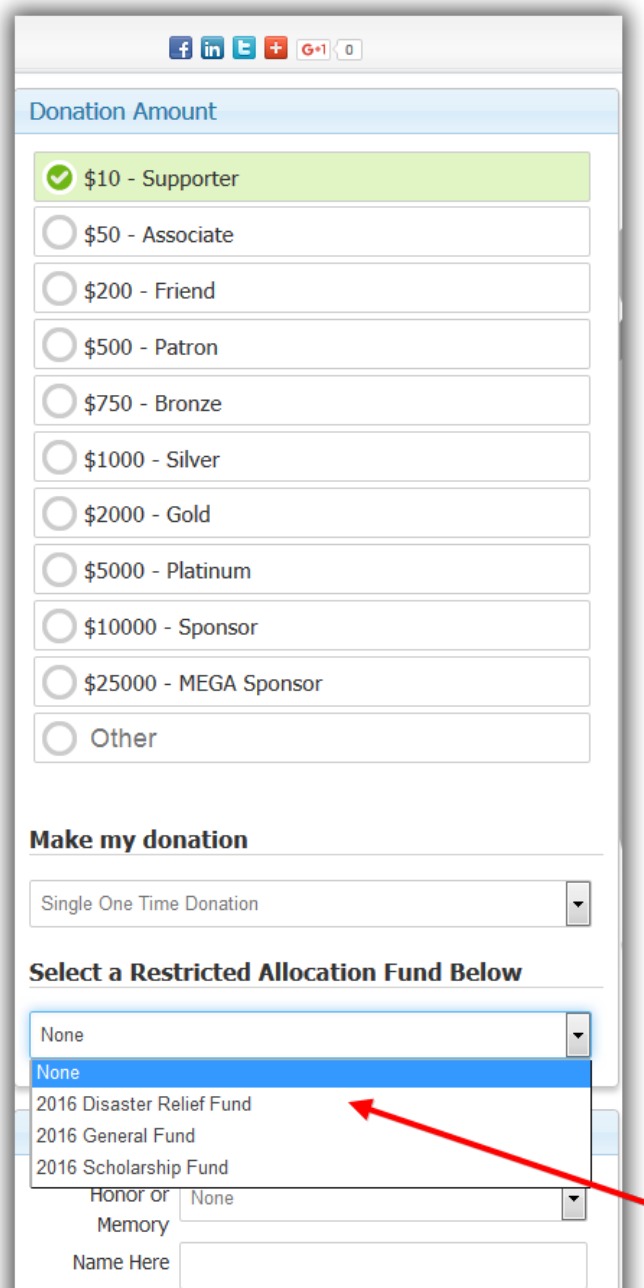
You'll get a load status screen showing the progress of the unique table refresh.



Click **[OK]** once the refresh is complete.



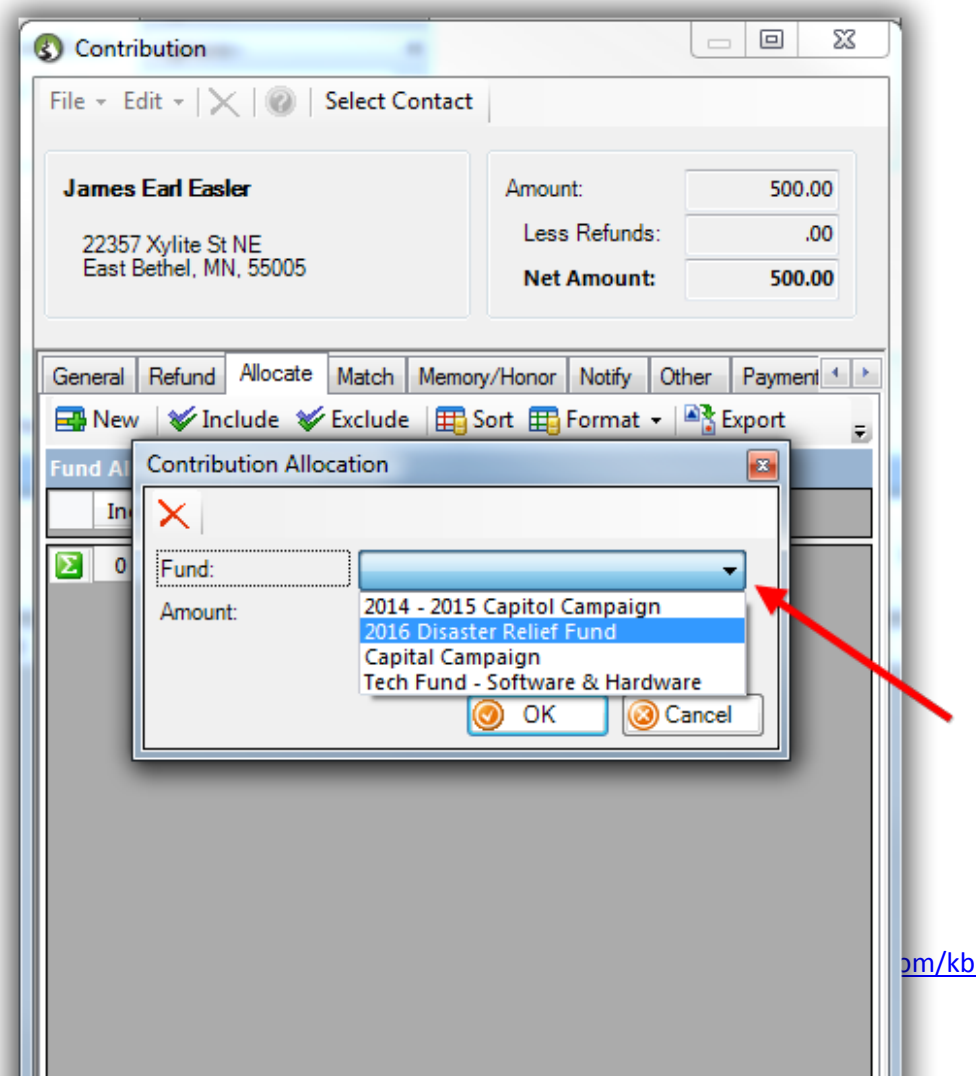
That completes the steps, you can view your funds on your online donation form at (www.trailblz.info/**YourDatabaseName**/Donations.aspx?ver=2). My *example* is below.



New restricted fund.

Within the database you'll be able to view the funds in your drop-down menus that were flagged as 'Active'. *My example is below showing the contribution input screen.*

Funds flagged as 'Active' will display in the drop-down menus in your database once you refresh the unique search value (drop-downs) table.



Tip: You can make your funds show in two different ways online (either in a drop-down like my example above) or as input boxes where a donor can split their donation towards multiple funds. If you want the donor to be able to split the donation between multiple funds simply 'uncheck' the box called '**Include Restricted Funds (Allocations) Dropdown Style**' in **Website Configuration** and then click the link to refresh your website settings.

Img 1 of 2 – Change your Donation Form to Allow Donors to Split their Donation into Multiple Funds

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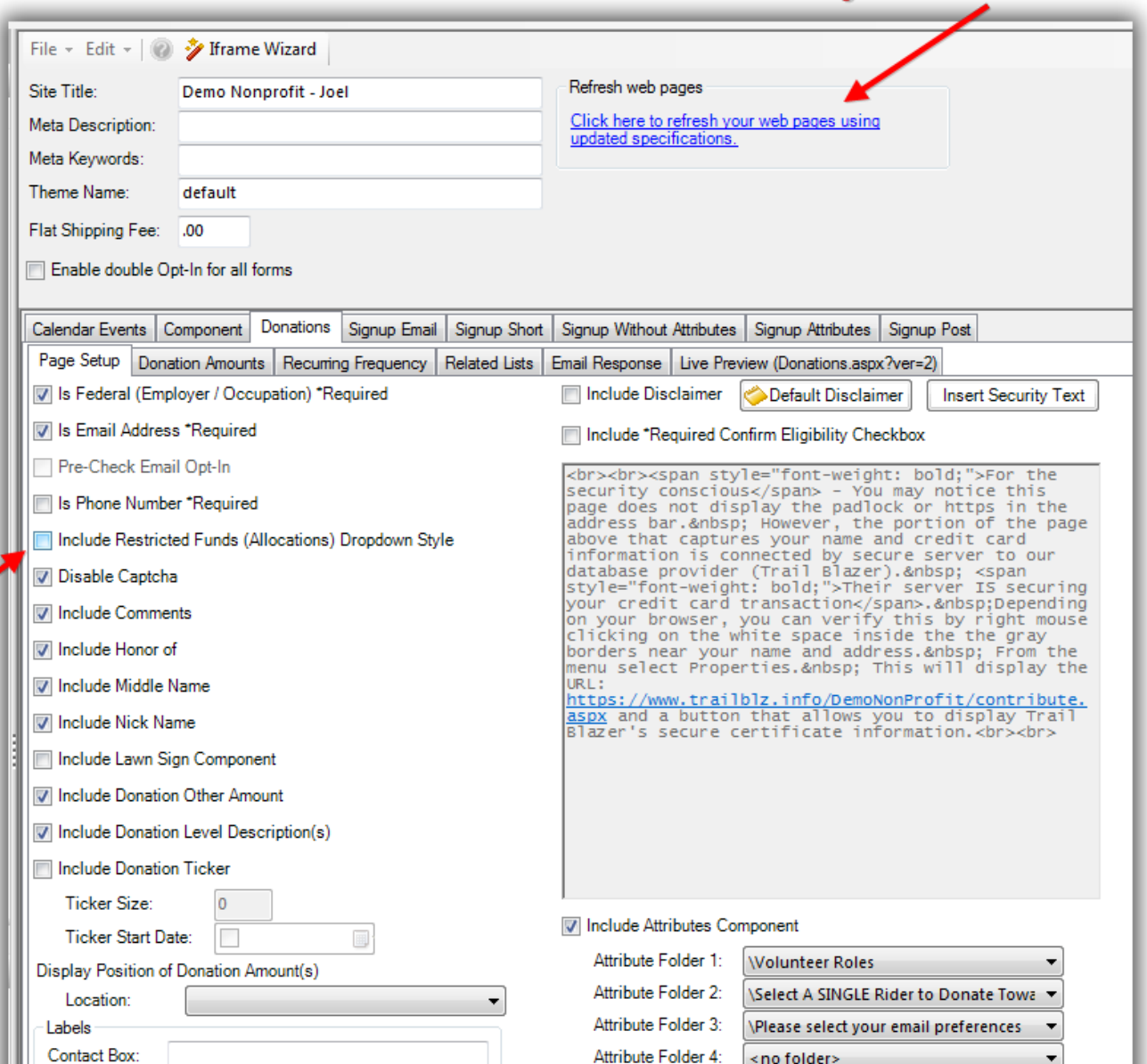
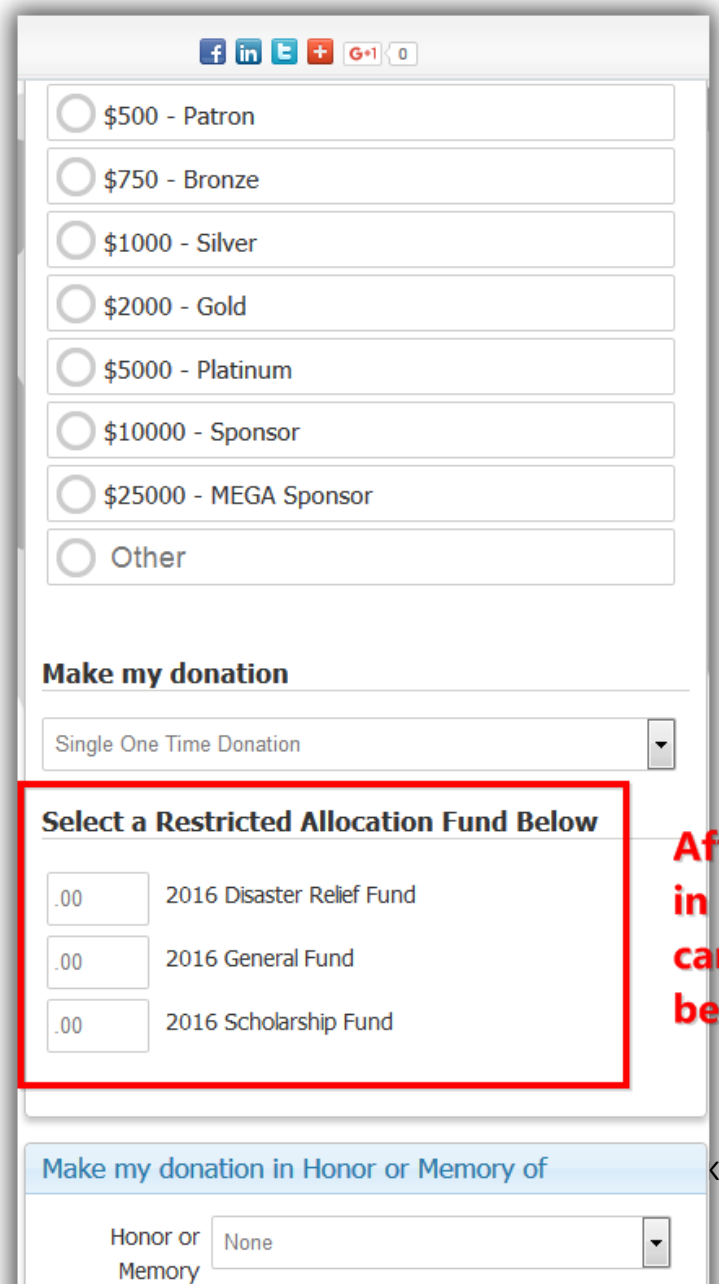
Click here after making changes to refresh your website settings.

***If you want your donors to be able to split their donation between multiple funds you can uncheck this box and then refresh your website settings.**



Img 2 of 2 – How the Form looks Online after making this Change



After making changes in web config your donors can now split a donation between multiple funds.

Take a look at the **related resources** below for links to many other articles and videos related to funds and configuring your online donation form, and please call our live support line if you need any assistance with this particular task or anything else.

Related Resources

Article: Configure Website
Article: Linking your Website to your Database with Configurable iFrame Forms
Article: How to Put your Trail Blazer Donation Form on your Facebook Page
Article: Web site signup < iframe >
Article: How to Configure Recurring Donation Options for your Trail Blazer Donation Form (must be using either Vanco Services or Authorize.Net as your Merchant Gateway)
Article: How to Enable ACH (E-Check) Payments with the Vanco Merchant Gateway on Trail Blazer's Donation Form
Article: Configure Website – Legacy Article
Article: How to Add a New 'Event' to the Drop-Down List for Entering Contributions
Article: Fund Allocation and Summary Report
Video: Iframes

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** 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.*

** This service is included in your contract.*