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**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.

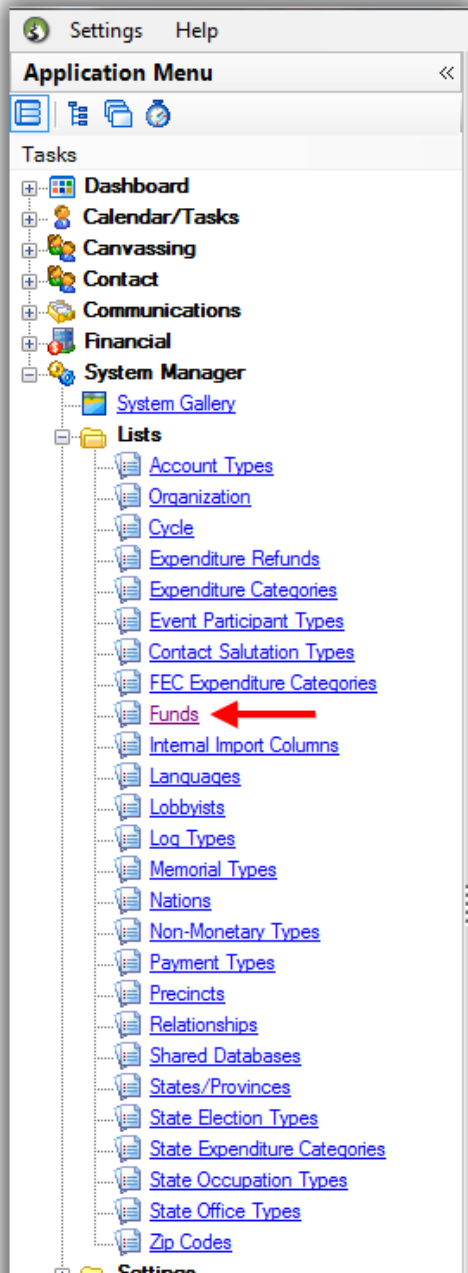
 **Tip:** Funds show where the money is going, ['events'](#) show where the money is coming from.

### **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**.

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



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

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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.*

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

**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).**

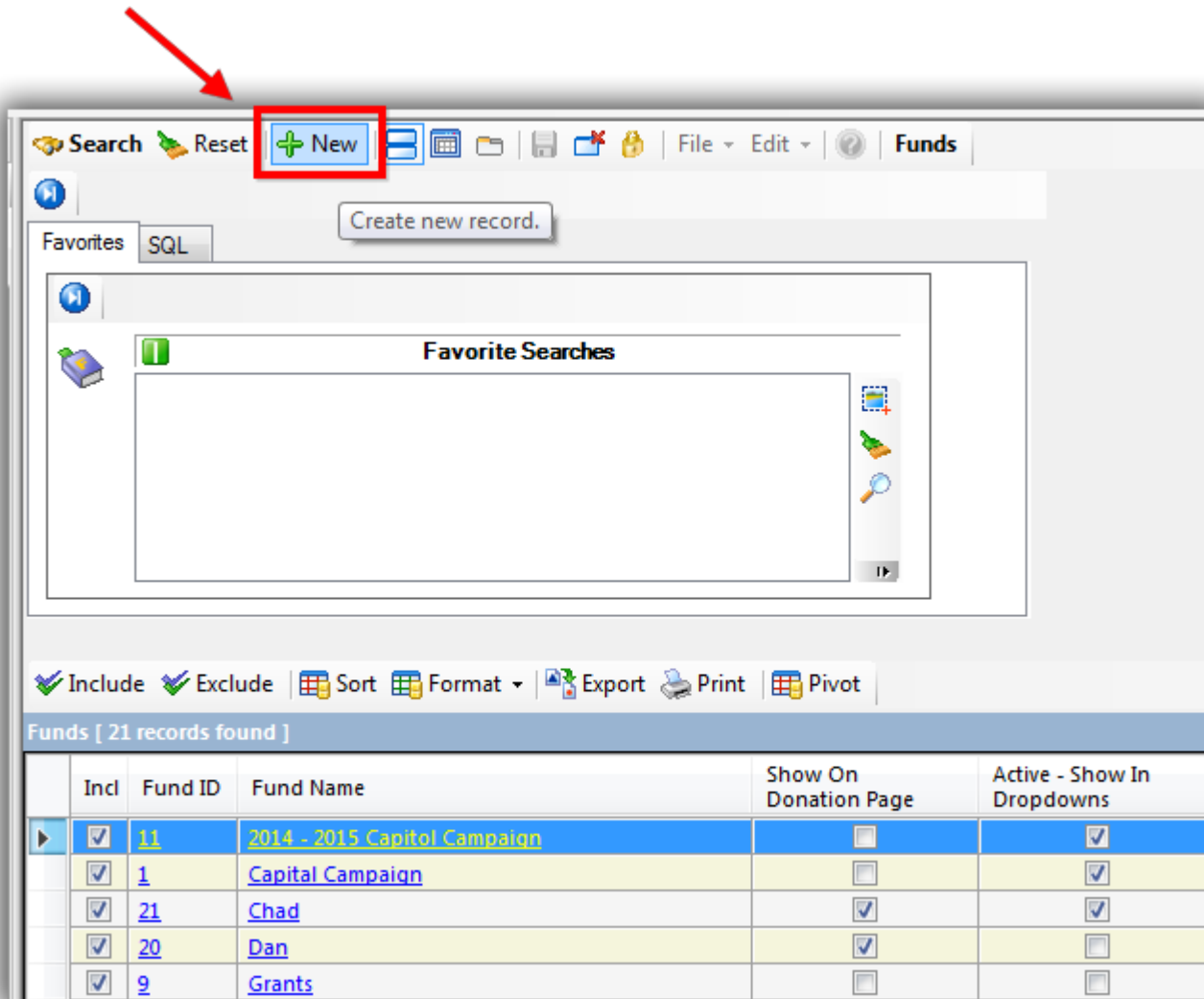
Incl	Fund ID	Fund Name	Show On Donation Page	Active - Show In Dropdowns
<input checked="" type="checkbox"/>	11	2014 - 2015 Capitol Campaign	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1	Capital Campaign	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	21	Chad	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	20	Dan	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	9	Grants	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	8	Japan - recovery	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	17	Jim	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	13	Joel	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	14	Kevin	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	15	Mark	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	2	New Roof Fund	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	18	Pat	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	5	ScholarShip 100 - African American Nurses	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	7	ScholarShip 100 - Female Culinary Arts Fund	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	4	ScholarShip 100 - Nickels Nursing Fund	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	3	Scholarship Fund	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	10	Sponsorship - Bob Meyer	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	19	Sue	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	12	Tech Fund - Software & Hardware	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	6	Theatre Equipment	<input type="checkbox"/>	<input type="checkbox"/>

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

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

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



The screenshot shows the TrailBlazer software interface. A red arrow points to a red-bordered box around the '+ New' button in the top toolbar. Below the toolbar is a search bar with a 'Create new record.' button. A 'Favorite Searches' section is visible below that. At the bottom, there is a table of funds with 21 records found.

	Incl	Fund ID	Fund Name	Show On Donation Page	Active - Show In Dropdowns
	<input checked="" type="checkbox"/>	<a href="#">11</a>	<a href="#">2014 - 2015 Capitol Campaign</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>	<a href="#">1</a>	<a href="#">Capital Campaign</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>	<a href="#">21</a>	<a href="#">Chad</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>	<a href="#">20</a>	<a href="#">Dan</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<a href="#">9</a>	<a href="#">Grants</a>	<input type="checkbox"/>	<input type="checkbox"/>

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

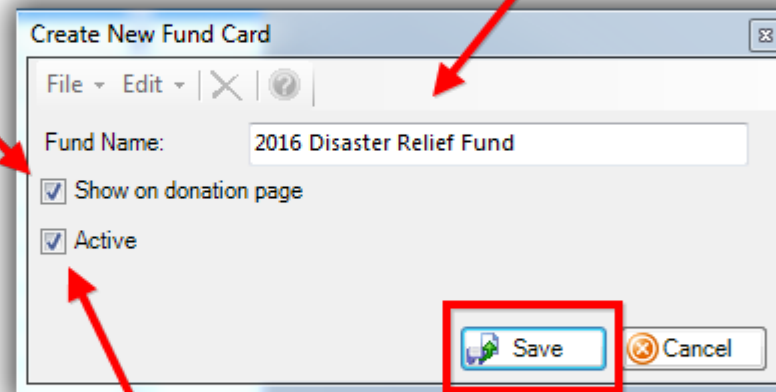
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Create a **name**, check the corresponding boxes if you want the fund to show on your **online donation form** and/or in the **drop-down menus** in your database, and click **[Save]**. *In my example I called '2016 Disaster Relief Fund' and I checked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



File Edit | X | ?

Fund Name: 2016 Disaster Relief Fund

Show on donation page

Active

Save Cancel

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

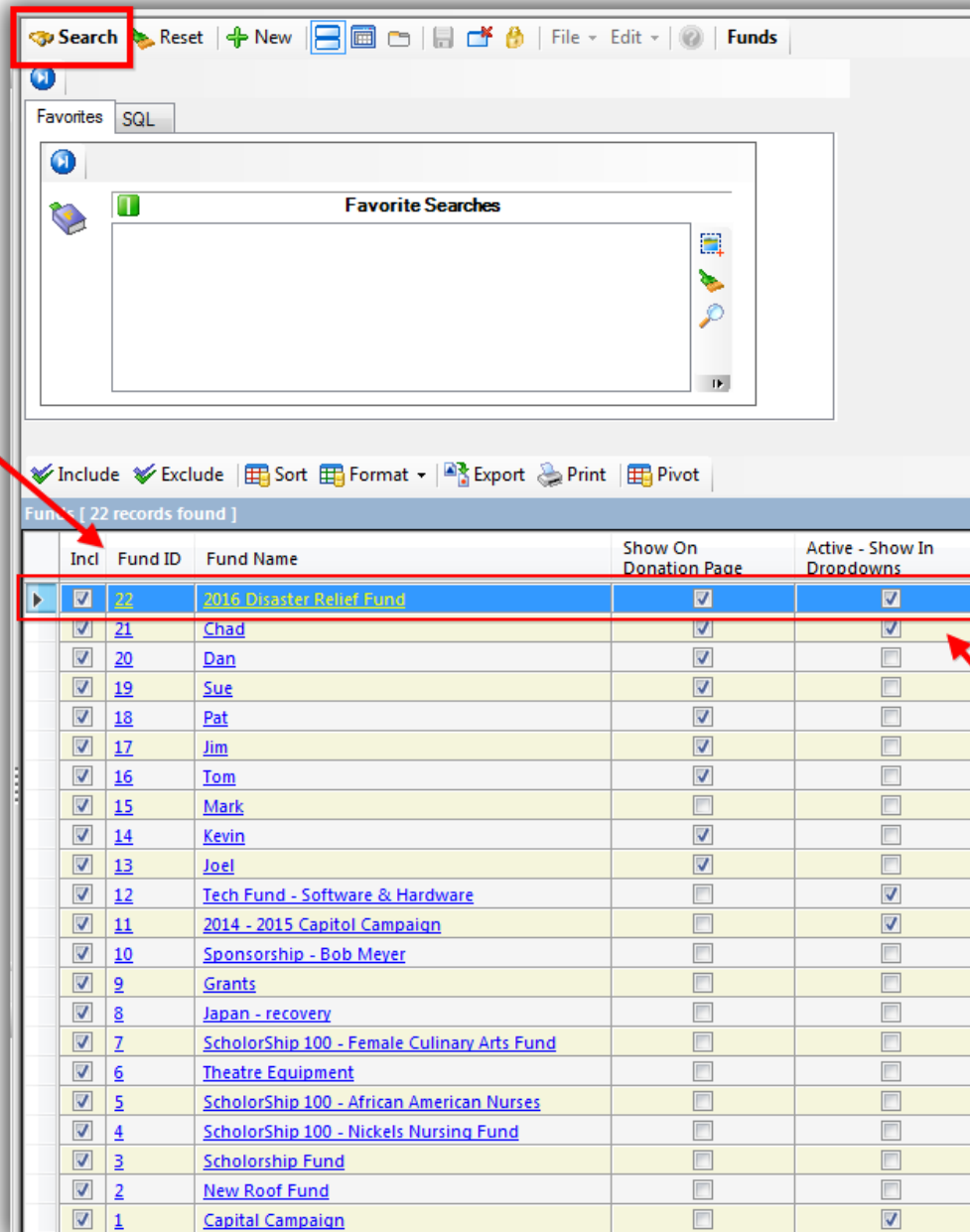
## How to Add and Remove Allocation Funds to your Online Donation Form, and to the Drop-Down Menus in your Database

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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.

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

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



Incl	Fund ID	Fund Name	Show On Donation Page	Active - Show In Dropdowns
<input checked="" type="checkbox"/>	22	2016 Disaster Relief Fund	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	21	Chad	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	20	Dan	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	19	Sue	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	18	Pat	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	17	Jim	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	16	Tom	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	15	Mark	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	14	Kevin	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	13	Joel	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	12	Tech Fund - Software & Hardware	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	11	2014 - 2015 Capitol Campaign	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	10	Sponsorship - Bob Meyer	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	9	Grants	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	8	Japan - recovery	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	7	ScholarShip 100 - Female Culinary Arts Fund	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	6	Theatre Equipment	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	5	ScholarShip 100 - African American Nurses	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	4	ScholarShip 100 - Nickels Nursing Fund	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	3	Scholarship Fund	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	2	New Roof Fund	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	1	Capital Campaign	<input type="checkbox"/>	<input checked="" type="checkbox"/>

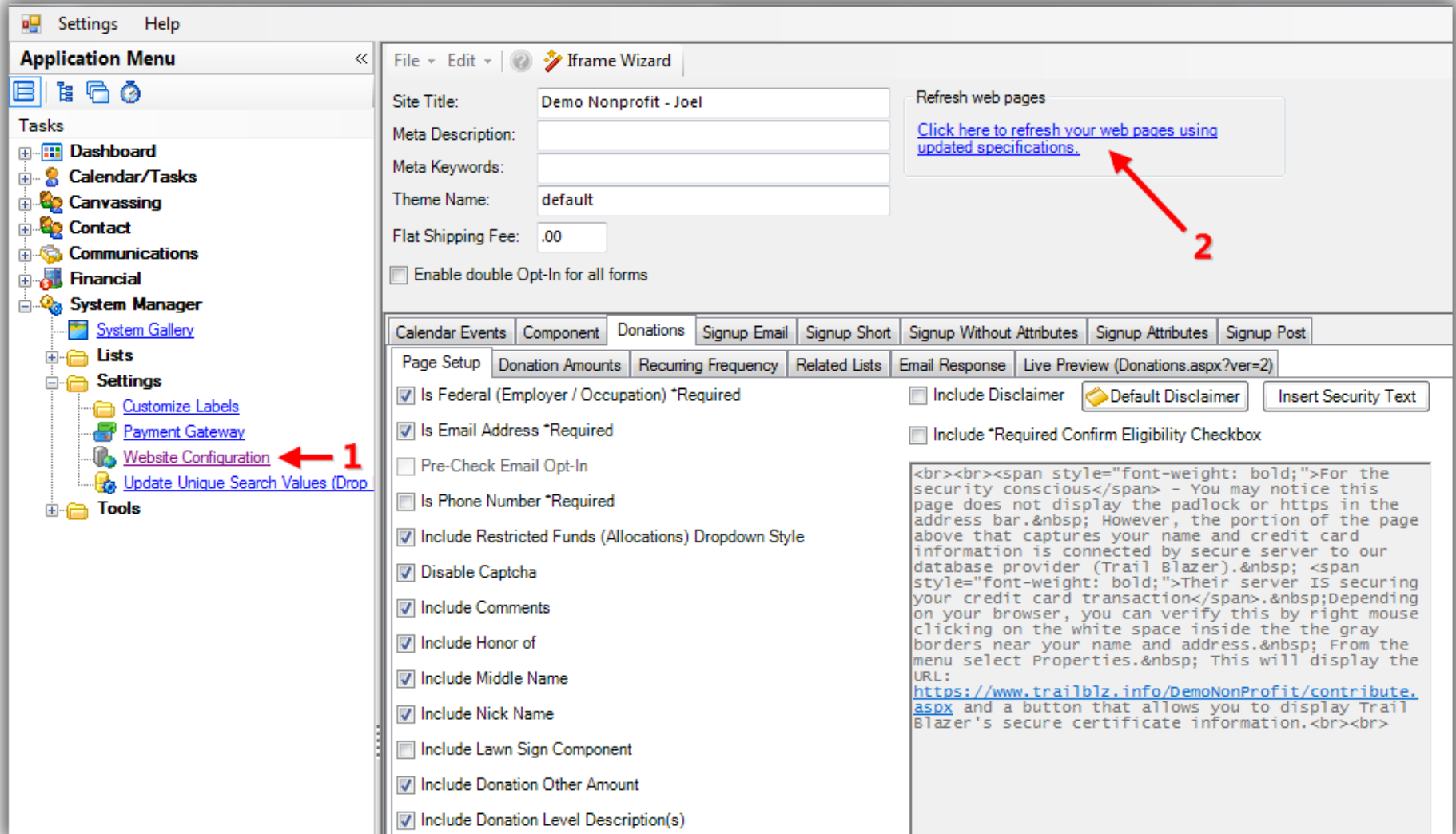
**Your new fund will display in the list after clicking [Search]. You can open it again if further changes are required.**

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

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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.

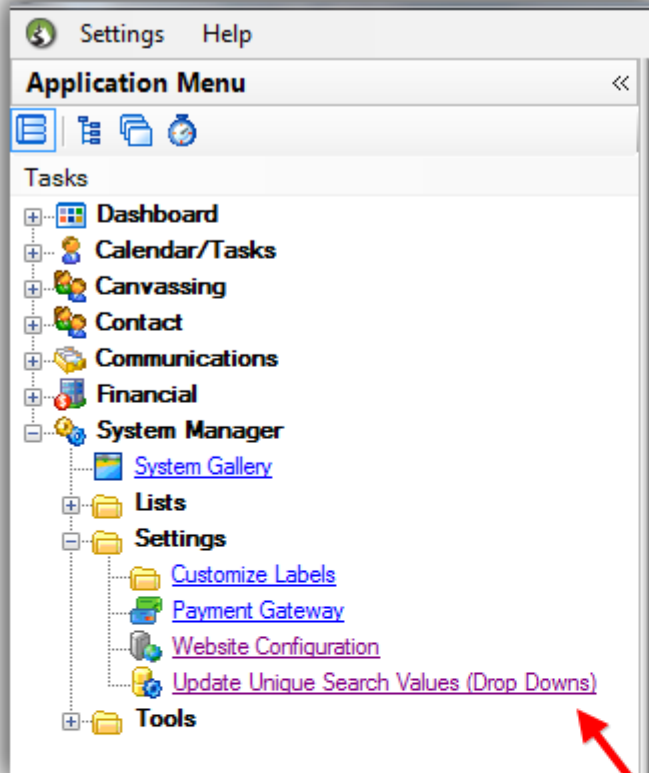


The screenshot displays the TrailBlazer settings interface. On the left is the 'Application Menu' with a tree view containing 'Tasks' (Dashboard, Calendar/Tasks, Canvassing, Contact, Communications, Financial, System Manager) and 'Tools' (System Gallery, Lists, Settings, Customize Labels, Payment Gateway, Website Configuration, Update Unique Search Values (Drop)). A red arrow labeled '1' points to 'Website Configuration'. The main area shows the 'Iframe Wizard' with fields for Site Title (Demo Nonprofit - Joel), Meta Description, Meta Keywords, Theme Name (default), and Flat Shipping Fee (.00). A checkbox for 'Enable double Opt-In for all forms' is present. A red arrow labeled '2' points to a blue link: 'Click here to refresh your web pages using updated specifications.' Below this is a tabbed interface with 'Donations' selected. The 'Page Setup' tab is active, showing various checkboxes for form requirements (e.g., 'Is Federal (Employer / Occupation) \*Required', 'Is Email Address \*Required', 'Is Phone Number \*Required') and options like 'Include Restricted Funds (Allocations) Dropdown Style', 'Disable Captcha', 'Include Comments', 'Include Honor of', 'Include Middle Name', 'Include Nick Name', 'Include Lawn Sign Component', 'Include Donation Other Amount', and 'Include Donation Level Description(s)'. A 'Default Disclaimer' button and an 'Insert Security Text' button are also visible. A text area at the bottom right contains a security warning in HTML format.

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

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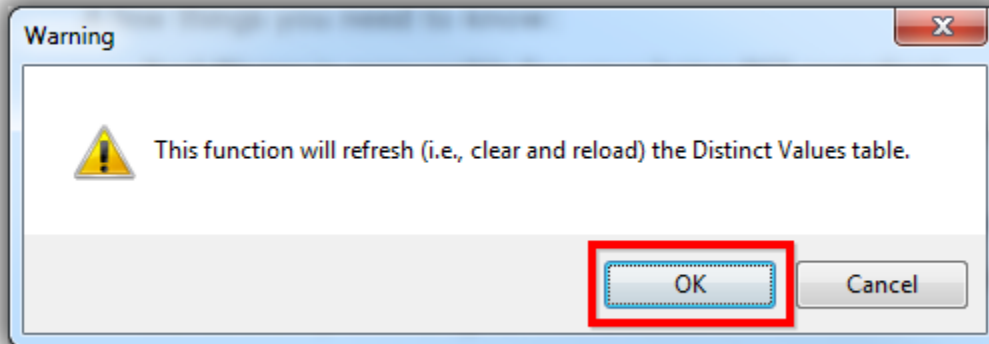
If you selected to have the fund show in the drop-down lists in our database by checking the 'Active' box, you'll want to refresh the drop-down lists by clicking the link under 'System Manager':



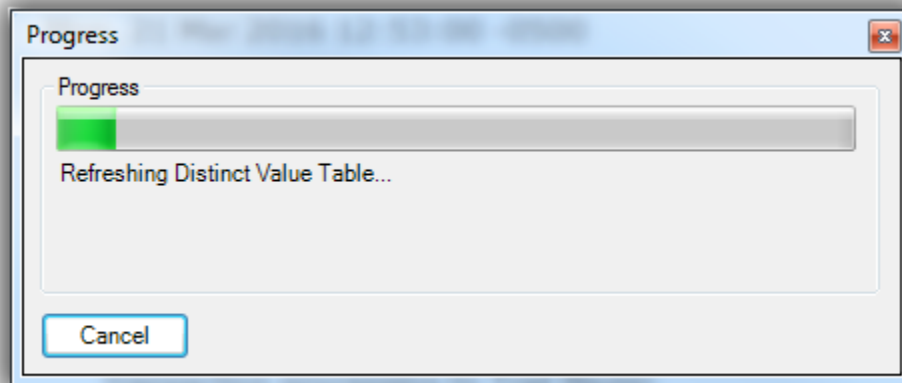
**Click this link to update the unique search value (drop-downs) in your database. May take longer if you have a large database and if it hasn't been run in awhile.**

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

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.

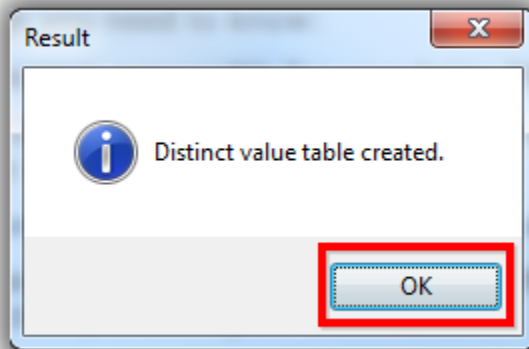


You'll get a load status screen showing the progress of the unique table refresh.



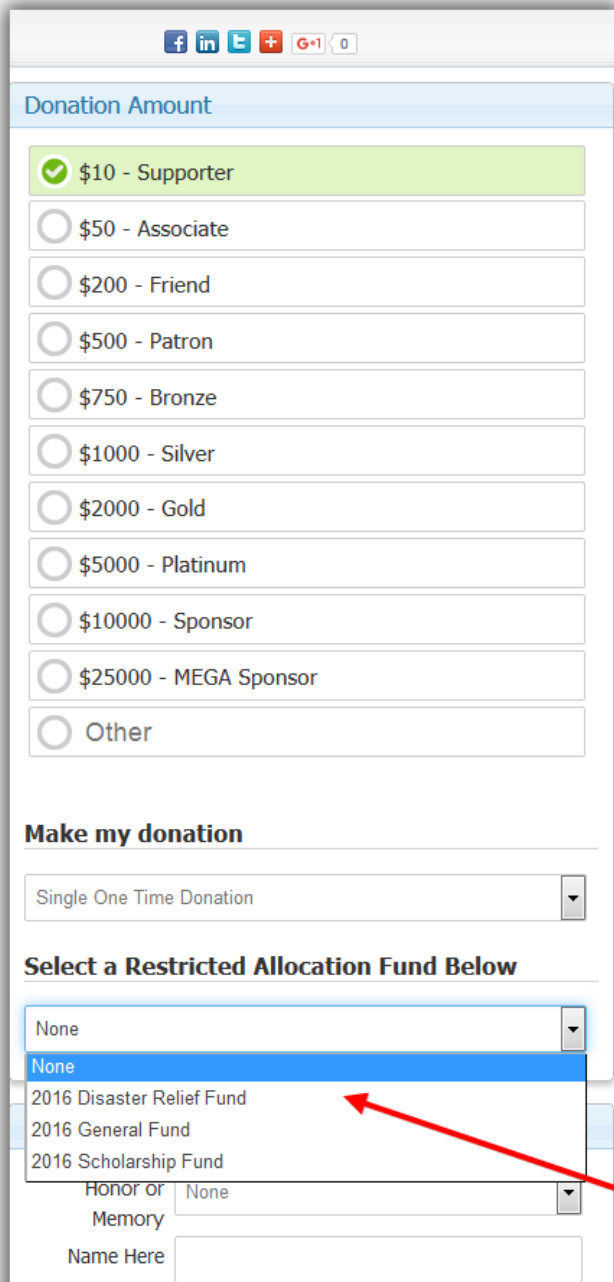


Click **[OK]** once the refresh is complete.



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

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



The screenshot shows a donation form with the following sections:

- Donation Amount:** A list of radio button options for donation levels: \$10 - Supporter (selected), \$50 - Associate, \$200 - Friend, \$500 - Patron, \$750 - Bronze, \$1000 - Silver, \$2000 - Gold, \$5000 - Platinum, \$10000 - Sponsor, \$25000 - MEGA Sponsor, and Other.
- Make my donation:** A dropdown menu currently set to "Single One Time Donation".
- Select a Restricted Allocation Fund Below:** A dropdown menu with "None" selected. The dropdown is open, showing a list of funds: "None", "2016 Disaster Relief Fund", "2016 General Fund", and "2016 Scholarship Fund". A red arrow points to the "2016 Disaster Relief Fund" option.
- Honor or Memory:** A dropdown menu currently set to "None".
- Name Here:** A text input field.

KNOWLEDGE BASE [www.trailblz.com/kb](http://www.trailblz.com/kb)

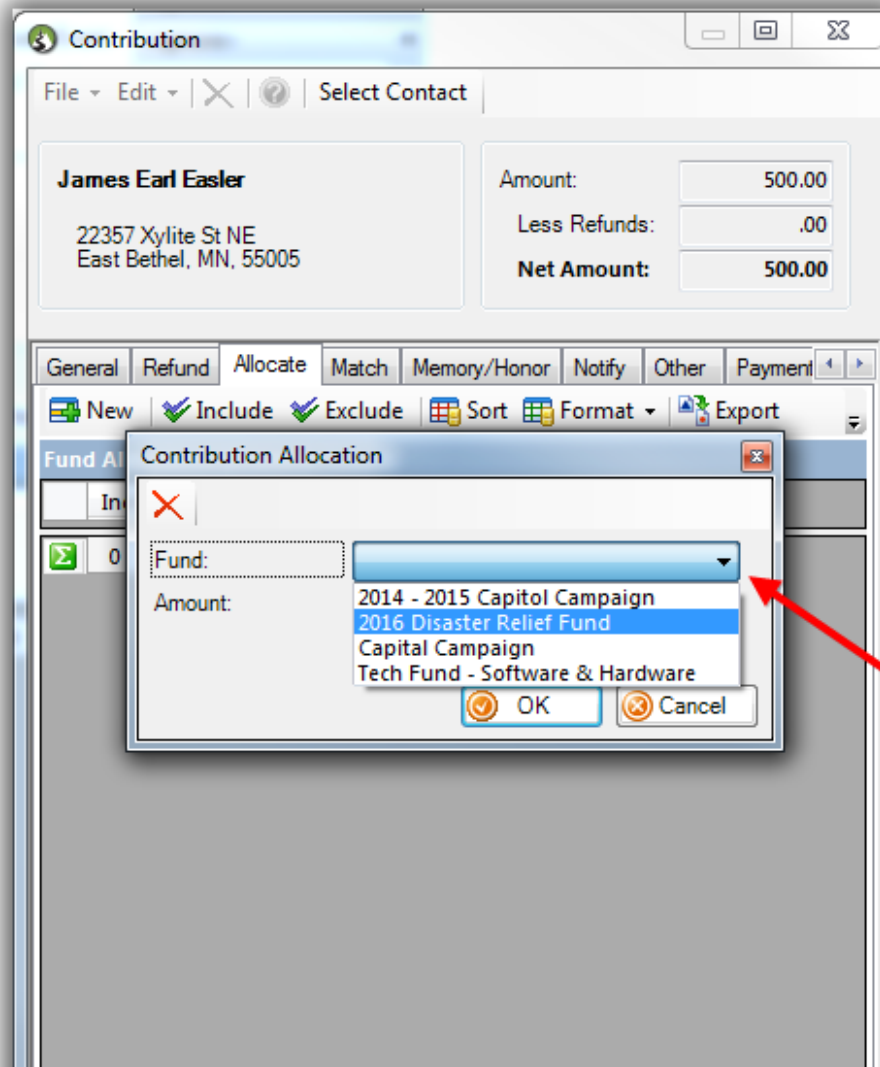
**New restricted fund.**

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

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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.**



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

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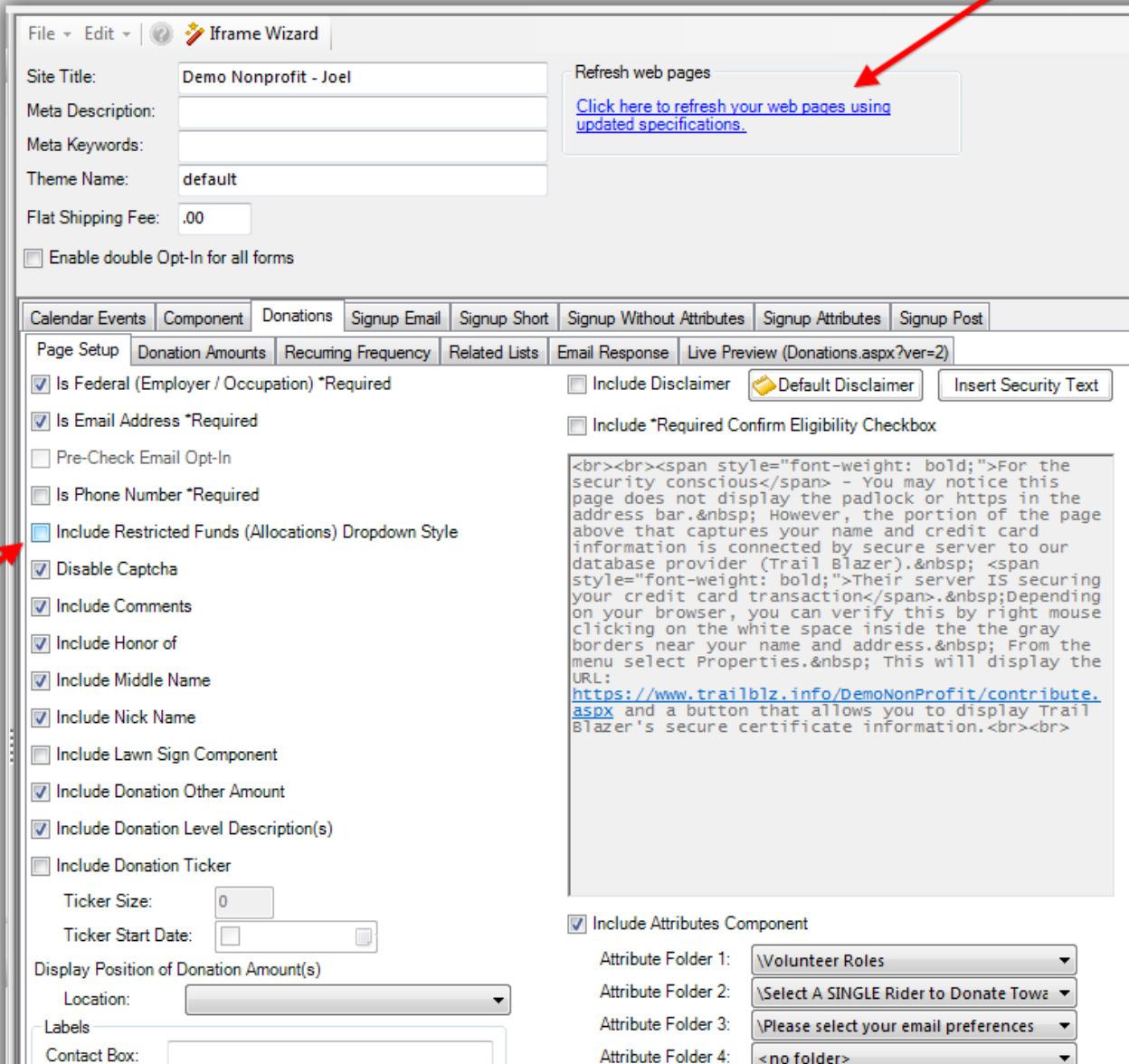
 **Tip:** You can make your funds show in two different ways online (either in a drop-down like my example above) or as input boxes where a donor can split their donation towards multiple funds. If you want the donor to be able to split the donation between multiple funds simply 'uncheck' the box called '**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

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

**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.**



File Edit IFrame Wizard

Site Title: Demo Nonprofit - Joel

Meta Description:

Meta Keywords:

Theme Name: default

Flat Shipping Fee: .00

Enable double Opt-In for all forms

Calendar Events Component Donations Signup Email Signup Short Signup Without Attributes Signup Attributes Signup Post

Page Setup Donation Amounts Recurring Frequency Related Lists Email Response Live Preview (Donations.aspx?ver=2)

Is Federal (Employer / Occupation) \*Required

Is Email Address \*Required

Pre-Check Email Opt-In

Is Phone Number \*Required

Include Restricted Funds (Allocations) Dropdown Style

Disable Captcha

Include Comments

Include Honor of

Include Middle Name

Include Nick Name

Include Lawn Sign Component

Include Donation Other Amount

Include Donation Level Description(s)

Include Donation Ticker

Ticker Size: 0


Ticker Start Date: [ ]

Display Position of Donation Amount(s)

Location: [ ]

Labels

Contact Box: [ ]

Include Disclaimer  Default Disclaimer

Include \*Required Confirm Eligibility Checkbox

```
<br><br><span style="font-weight: bold;">For the security conscious</span> - You may notice this page does not display the padlock or https in the address bar.&nbsp;&nbsp;&nbsp;However, the portion of the page above that captures your name and credit card information is connected by secure server to our database provider (Trail Blazer).&nbsp;&nbsp;&nbsp;<span style="font-weight: bold;">Their server IS securing your credit card transaction</span>.&nbsp;&nbsp;&nbsp;Depending on your browser, you can verify this by right mouse clicking on the white space inside the the gray borders near your name and address.&nbsp;&nbsp;&nbsp;From the menu select Properties.&nbsp;&nbsp;&nbsp;This will display the URL:  
https://www.trailblz.info/DemoNonProfit/contribute.aspx and a button that allows you to display Trail Blazer's secure certificate information.<br><br>
```

Include Attributes Component

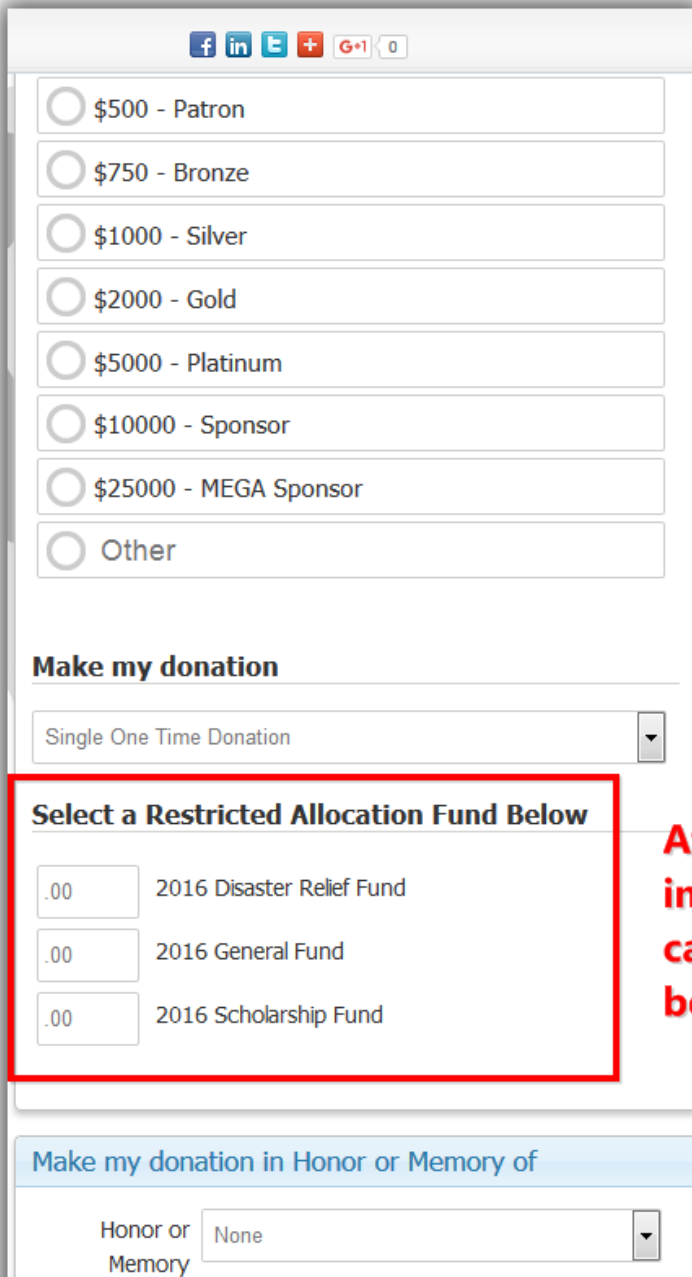
Attribute Folder 1: Volunteer Roles

Attribute Folder 2: Select A SINGLE Rider to Donate Toward

Attribute Folder 3: Please select your email preferences

Attribute Folder 4: <no folder>

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



The screenshot shows a donation form with the following elements:

- Social media sharing icons: Facebook, LinkedIn, Twitter, a plus sign, Google+, and a counter showing 0.
- Radio button options for donation levels:
  - \$500 - Patron
  - \$750 - Bronze
  - \$1000 - Silver
  - \$2000 - Gold
  - \$5000 - Platinum
  - \$10000 - Sponsor
  - \$25000 - MEGA Sponsor
  - Other
- A section titled "Make my donation" with a dropdown menu currently set to "Single One Time Donation".
- A section titled "Select a Restricted Allocation Fund Below" which is highlighted with a red box. It contains three rows, each with a ".00" input field and a fund name:
  - 2016 Disaster Relief Fund
  - 2016 General Fund
  - 2016 Scholarship Fund
- A section titled "Make my donation in Honor or Memory of" with a dropdown menu currently set to "None".

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



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

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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.



Trail Blazer™

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

## 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](#)

## Trail Blazer Live Support

📞 **Phone:** 1-866-909-8700

✉️ **Email:** [support@trailblz.com](mailto: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.*

*\* This service is included in your contract.*