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## Overview

This article walks through the steps to configure the remote desktop app on your Mac for exporting. It assumes you've already downloaded and setup your [remote desktop application](#). *If you need your **credentials** for this you'll need to contact our live support, they also should have been provided in our welcomes emails that we sent to the DB admins when your database was first created.*

 **Tip:** If you want to setup a remote connection to **Trail Blazer** on your PC (or [MS Surface device](#)), [click here](#). If you want to setup access to **Trail Blazer** on your iDevices (iPhone/iPod touch/iPad), [click here](#). If you want to use our web apps to access your contacts without downloading anything, [click here](#).

## Steps

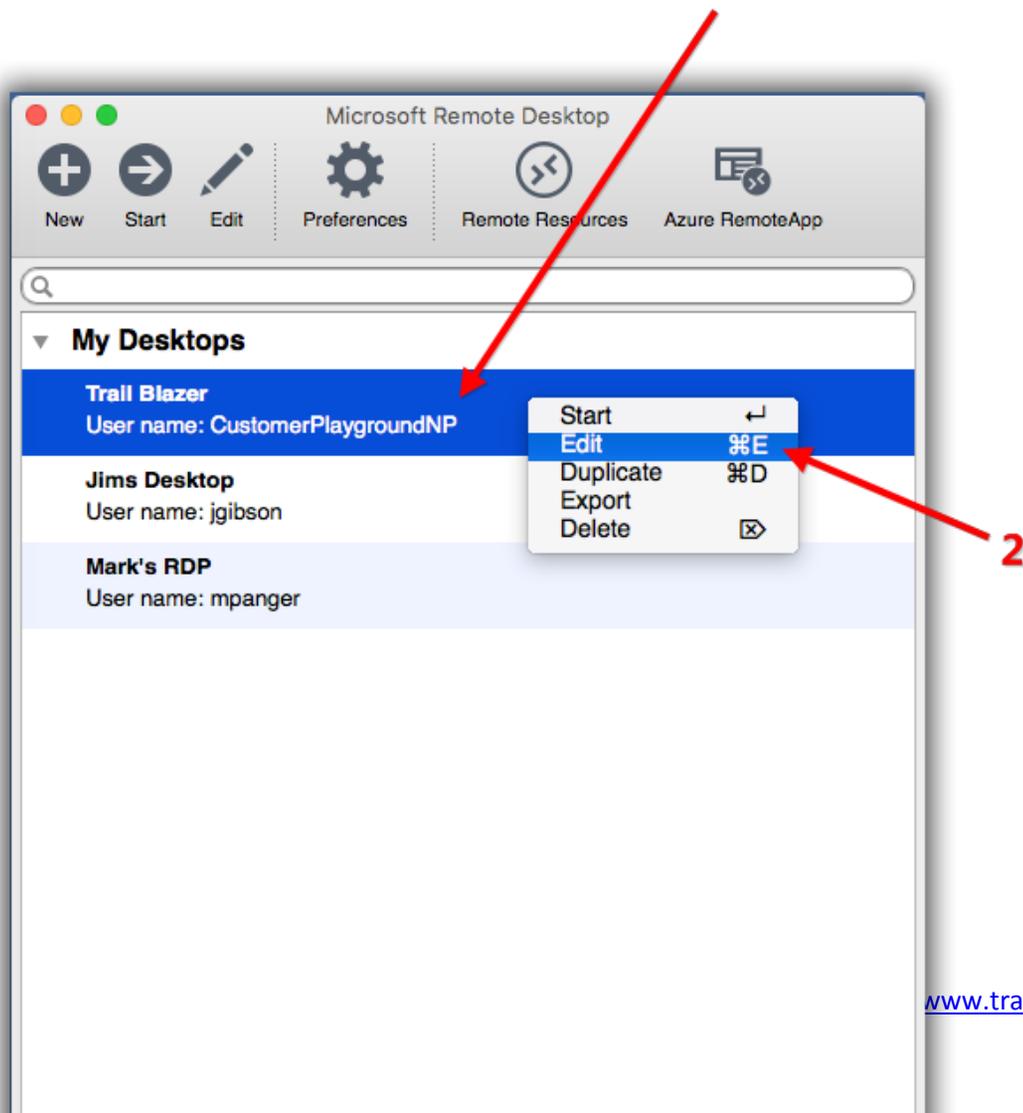
- 1) Launch the MS Remote Desktop app. Assumes you've already [downloaded and installed](#) the remote desktop app.



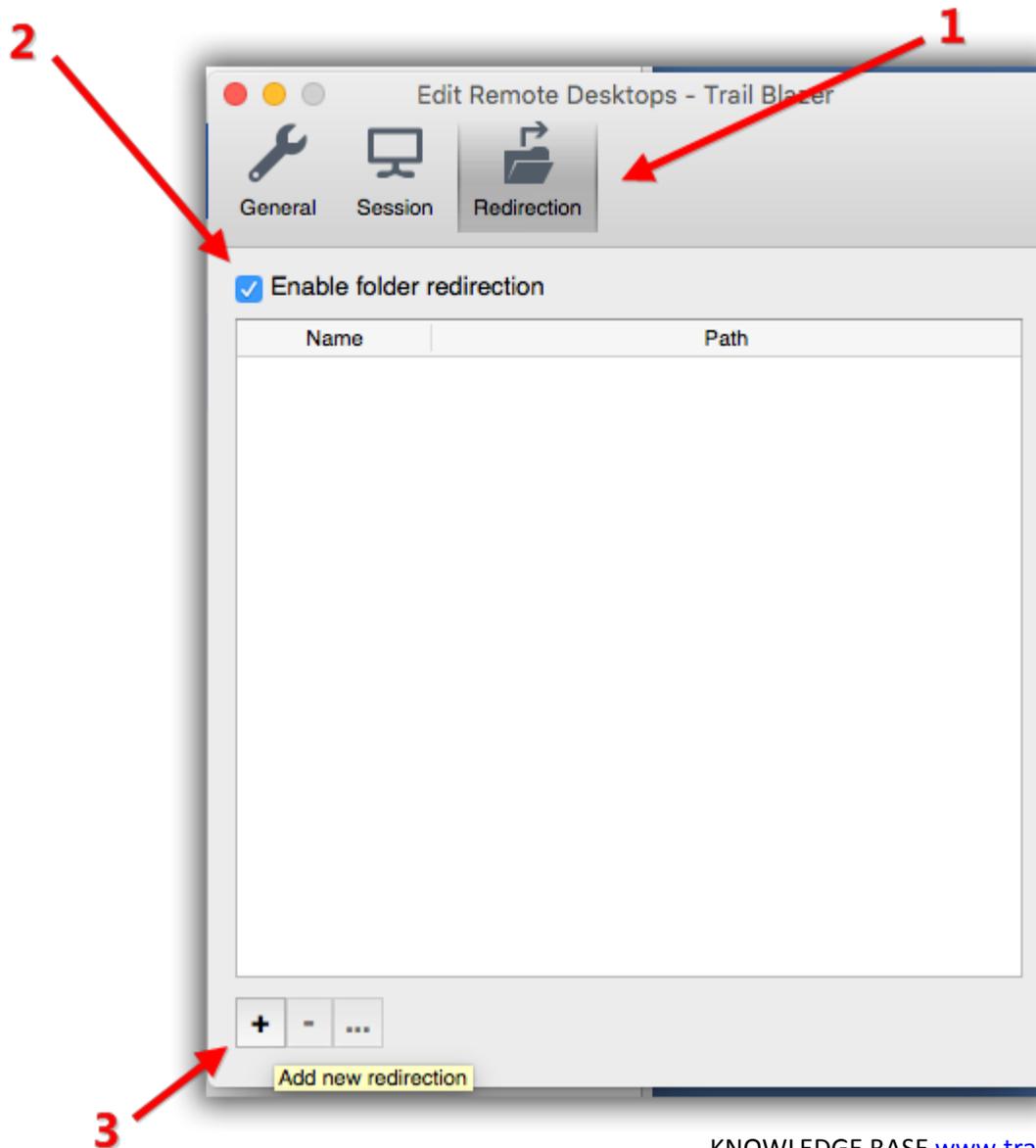
**Launch the MS Remote Desktop**

**2) Right-click** on the connection you've created to **Trail Blazer's** remote app server and select **Edit** from the context menu. *If you don't have a mouse connected to your Mac with a right-click button, **you should definitely get one**, otherwise use two fingers to click on the D-pad.*

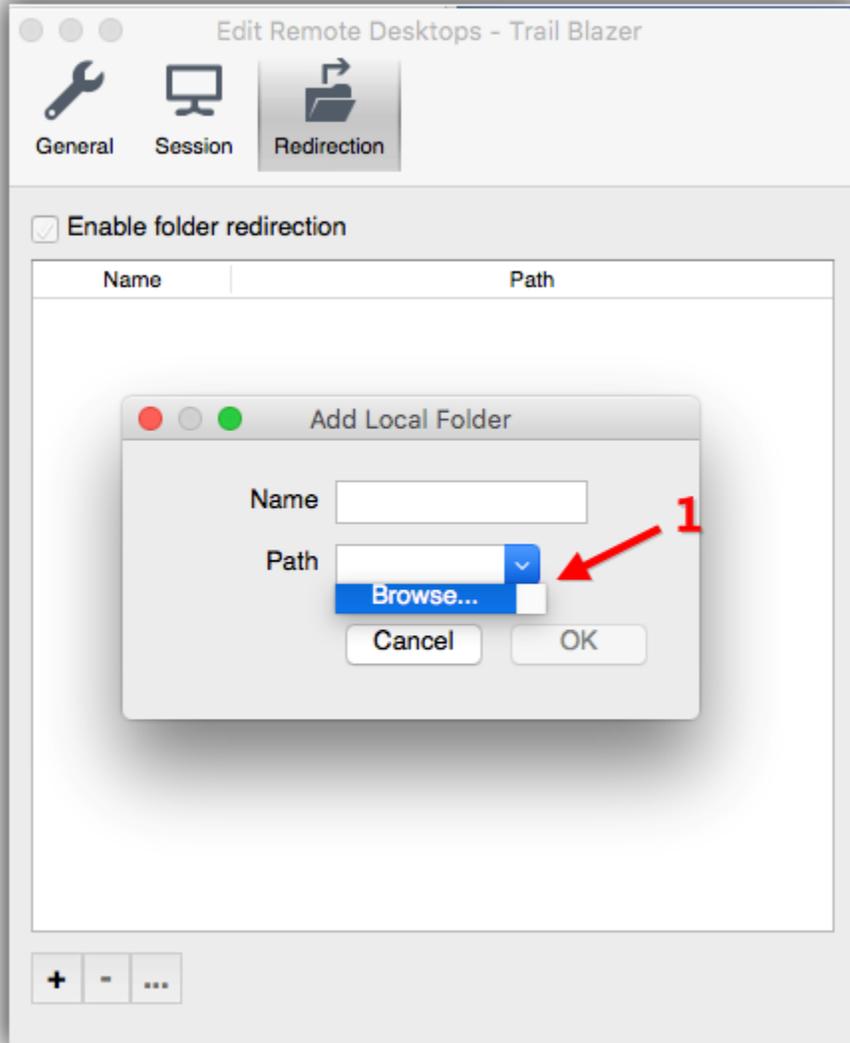
**1. Right-click on the remote connection you've created to our app server, and select 'Edit' from the context menu.**



**3)** Navigate to the **Redirection** tab, and click the **[+]** button in the lower-left. *Make sure the box is checked for 'Enable folder redirection' (which should be by default).*

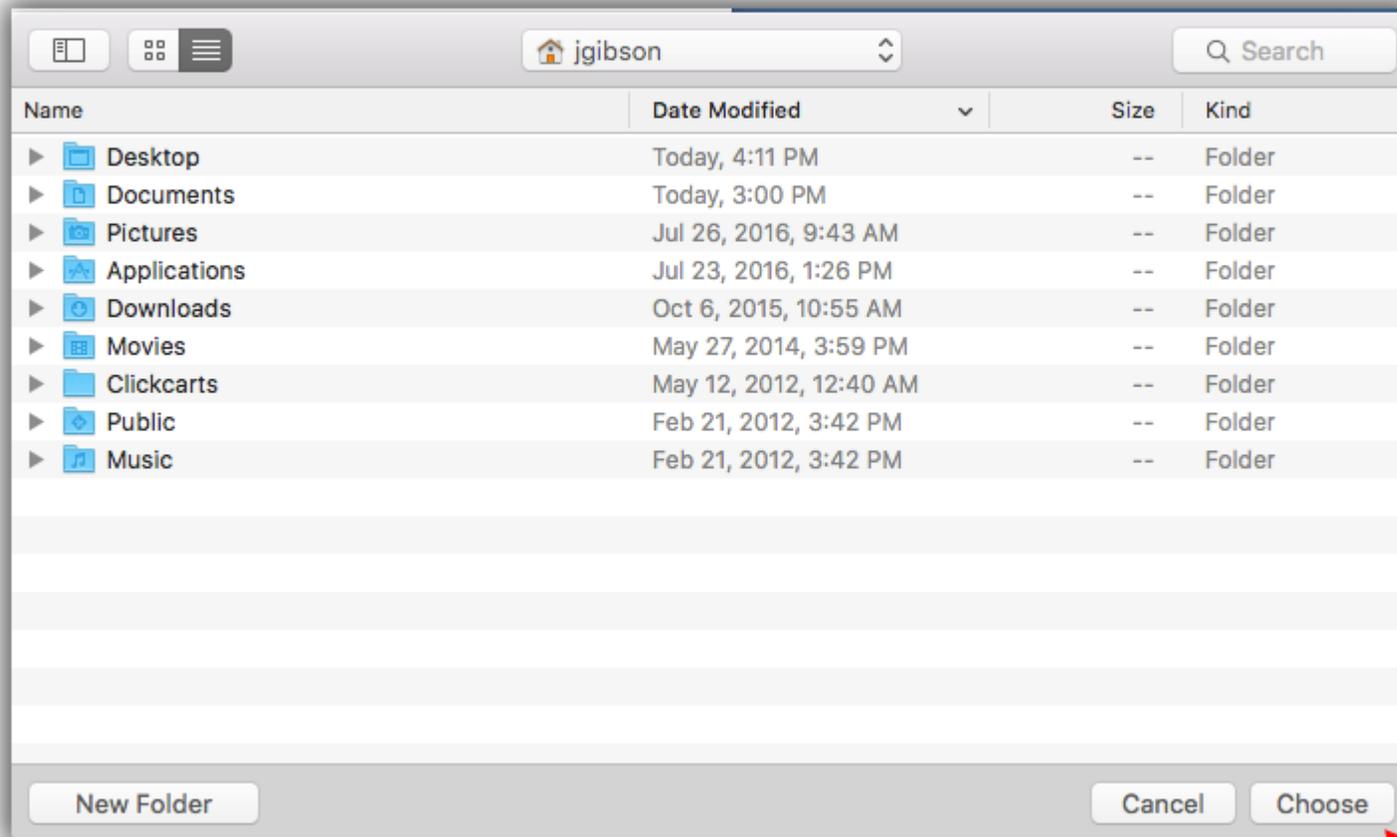


4) From the **Add Local Folder** screen select the Path drop-down, and click **Browse**.

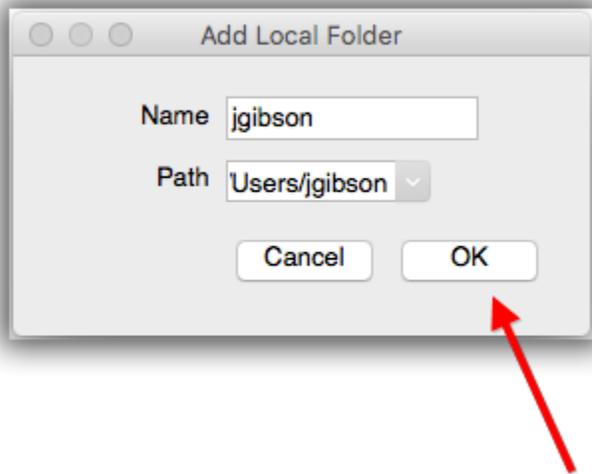


5) Navigate to the directory where you want to be able to export/import data from on your Mac, and then click **[Choose]**. *In my example I left the default as is for 'all' directories.*

**1. Navigate to the directory on your Mac where you want to be able to import/export data from i.e. Downloads, Documents, Desktop (or in this case, 'all directories').**

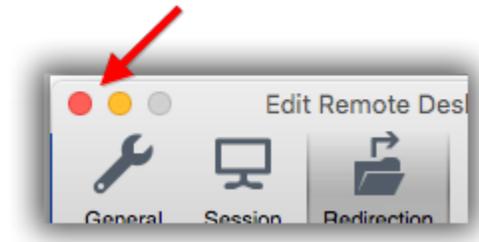


6) Click **[OK]** once you're back on the **Add Local Folder** screen to complete the redirect configuration.

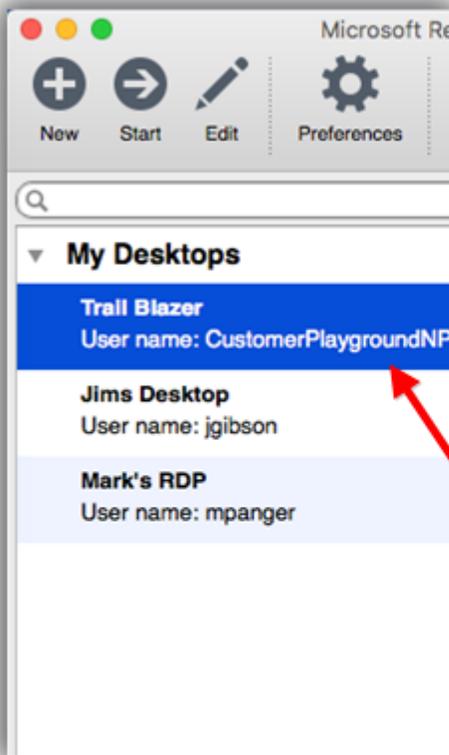


7) Click the red **(x)** in the upper-left of the remote desktop configuration screen to close it and return back to the main login screen.

**Once you've mapped your directory, click the red (x) in the upper-left to return to the main remote desktop login screen.**



**8)** Double-click on your **Trail Blazer** connection to log into the remote app server. *In this example I used my Customer Playground NP connection.*



**Double-click on your Trail BLazer connection to login to the remote app server.**

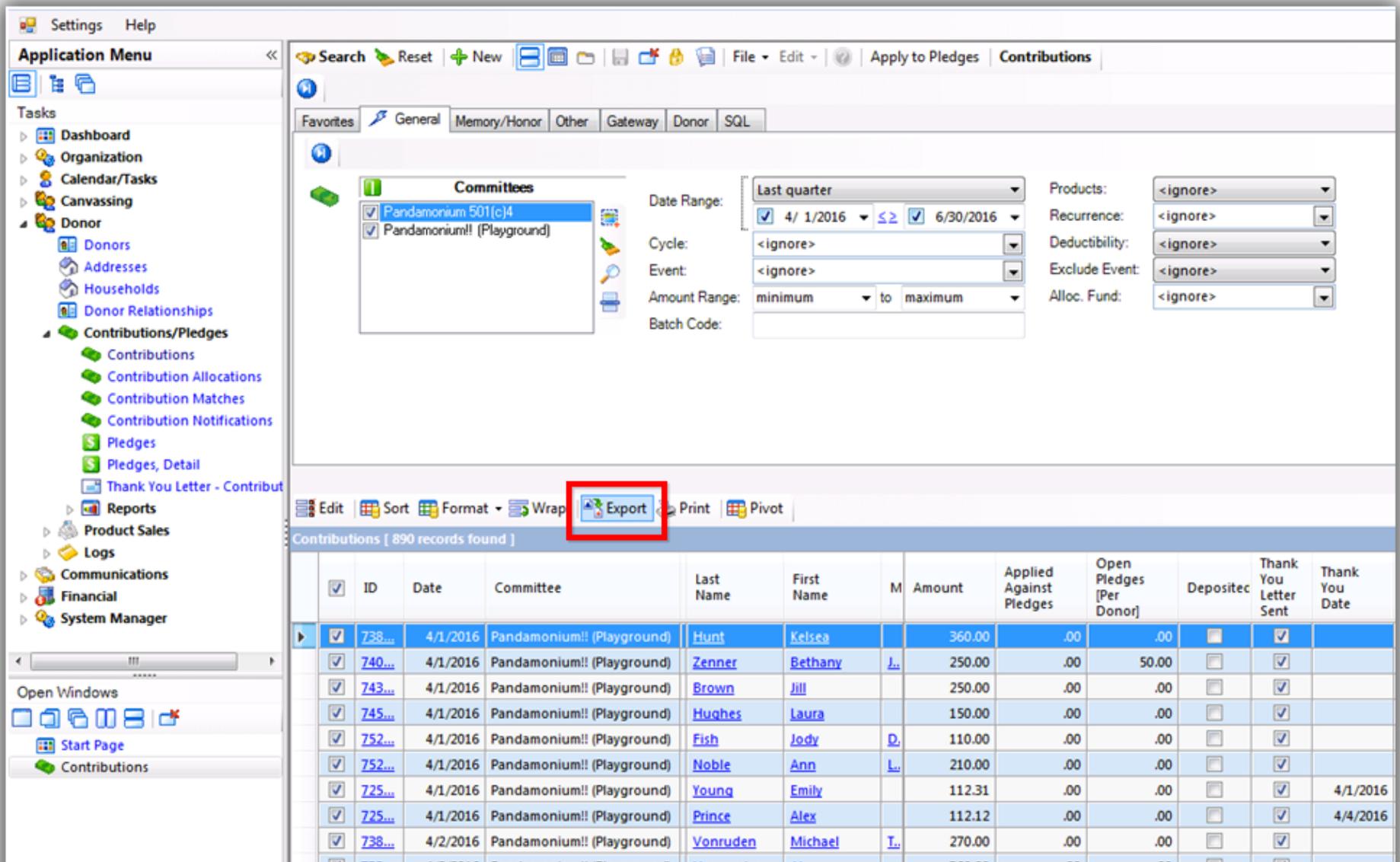
9) Launch the **Trail Blazer** application and login. *I prefer to pin it to the Task Bar for efficiency.*



**Launch the Trail Blazer app  
and login with your unique  
credentials.**

**10)** Build and run your [search query](#) for the list of data you're going after (voters/donors/contributions/pledges/households/etc.). *In my example I pulled up all donations for 2015 from the **Contributions** list.*

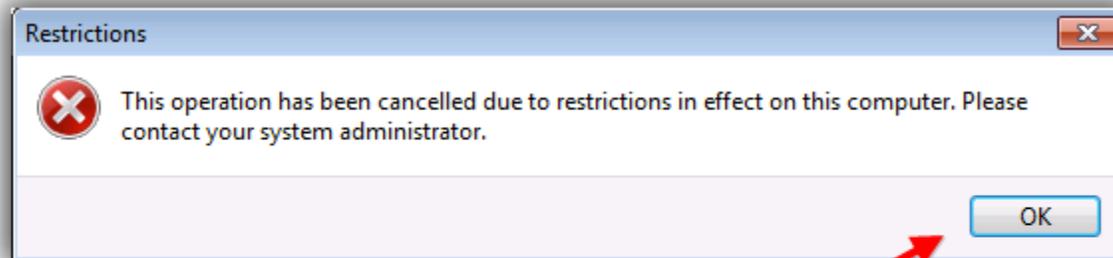
**Build and run your search query (in this example all donations for 2015), and then click [Export].**



The screenshot shows the TrailBlazer application interface. On the left is an 'Application Menu' with a tree view containing categories like 'Tasks', 'Donor', 'Contributions/Pledges', 'Reports', 'Product Sales', 'Logs', 'Communications', 'Financial', and 'System Manager'. The main window is titled 'Contributions' and features a search bar with 'Search', 'Reset', and '+ New' buttons. Below the search bar are tabs for 'Favorites', 'General', 'Memory/Honor', 'Other', 'Gateway', 'Donor', and 'SQL'. The 'General' tab is active, showing search filters for 'Committees' (with 'Pandamonium 501(c)4' and 'Pandamonium!! (Playground)' selected), 'Date Range' (set to 'Last quarter' from 4/1/2016 to 6/30/2016), 'Cycle', 'Event', 'Amount Range', and 'Batch Code'. On the right, there are dropdown menus for 'Products', 'Recurrence', 'Deductibility', 'Exclude Event', and 'Alloc. Fund', all set to '<ignore>'. At the bottom of the filter area, an 'Export' button is highlighted with a red rectangle. Below the filters is a toolbar with 'Edit', 'Sort', 'Format', 'Wrap', 'Print', and 'Pivot' options. The main data area shows a table with 890 records found. The table columns are: ID, Date, Committee, Last Name, First Name, M, Amount, Applied Against Pledges, Open Pledges [Per Donor], Deposit, Thank You Letter Sent, and Thank You Date. The first few rows of data are as follows:

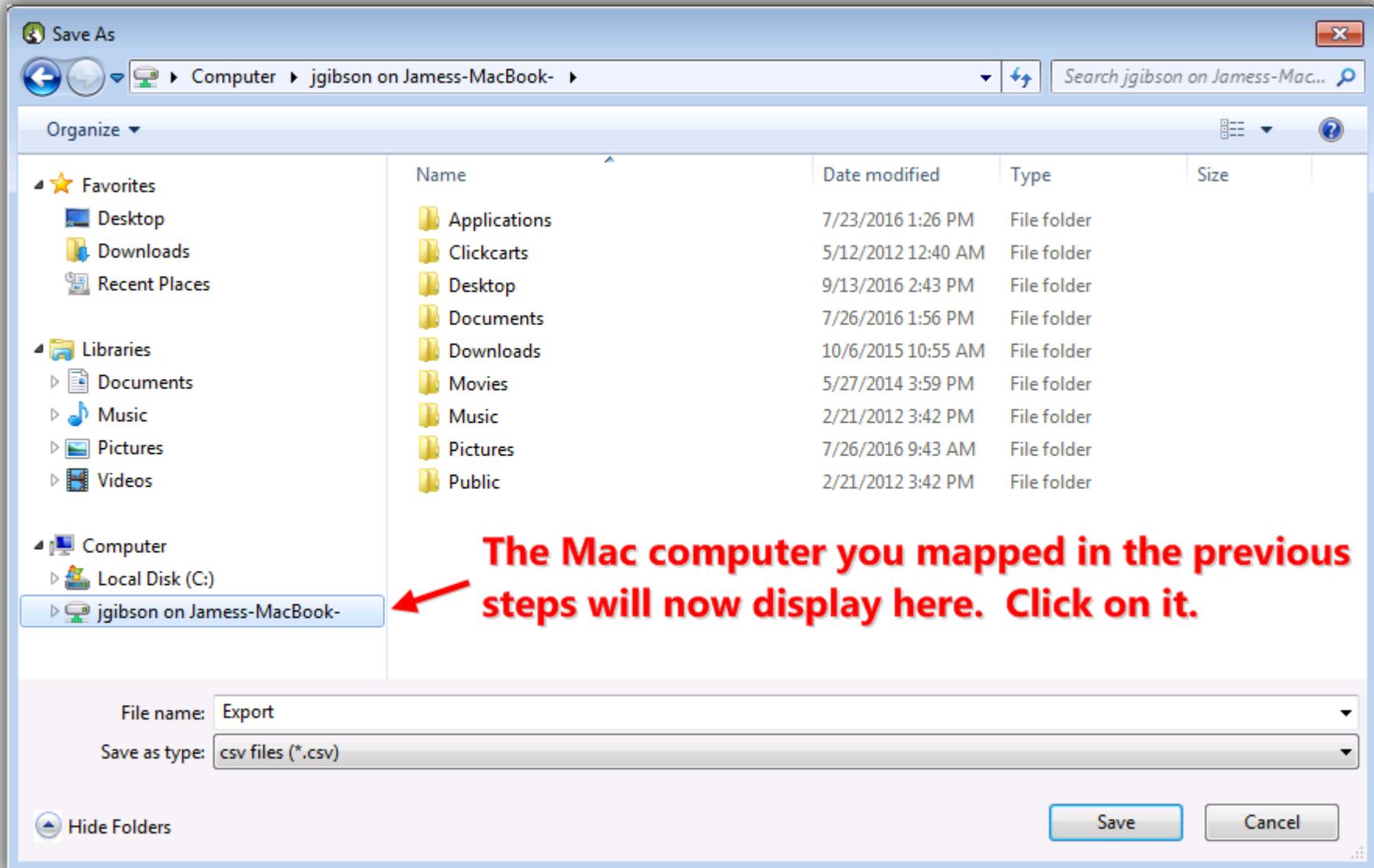
ID	Date	Committee	Last Name	First Name	M	Amount	Applied Against Pledges	Open Pledges [Per Donor]	Deposit	Thank You Letter Sent	Thank You Date
738...	4/1/2016	Pandamonium!! (Playground)	Hunt	Kelsea		360.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
740...	4/1/2016	Pandamonium!! (Playground)	Zenner	Bethany	J.	250.00	.00	50.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
743...	4/1/2016	Pandamonium!! (Playground)	Brown	Jill		250.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
745...	4/1/2016	Pandamonium!! (Playground)	Hughes	Laura		150.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
752...	4/1/2016	Pandamonium!! (Playground)	Fish	Jody	D.	110.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
752...	4/1/2016	Pandamonium!! (Playground)	Noble	Ann	L.	210.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
725...	4/1/2016	Pandamonium!! (Playground)	Young	Emily		112.31	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	4/1/2016
725...	4/1/2016	Pandamonium!! (Playground)	Prince	Alex		112.12	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	4/4/2016
738...	4/2/2016	Pandamonium!! (Playground)	Vonruden	Michael	T.	270.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

**Note:** You will likely get 1 or 2 restriction messages like the one below telling you that you don't have permission to perform this operation. Click **[OK]** (sometimes twice) to bypass this message to get to the next step. *The reason this occurs is that the remote app server has very restricted security and in this case it's a false-positive warning.*



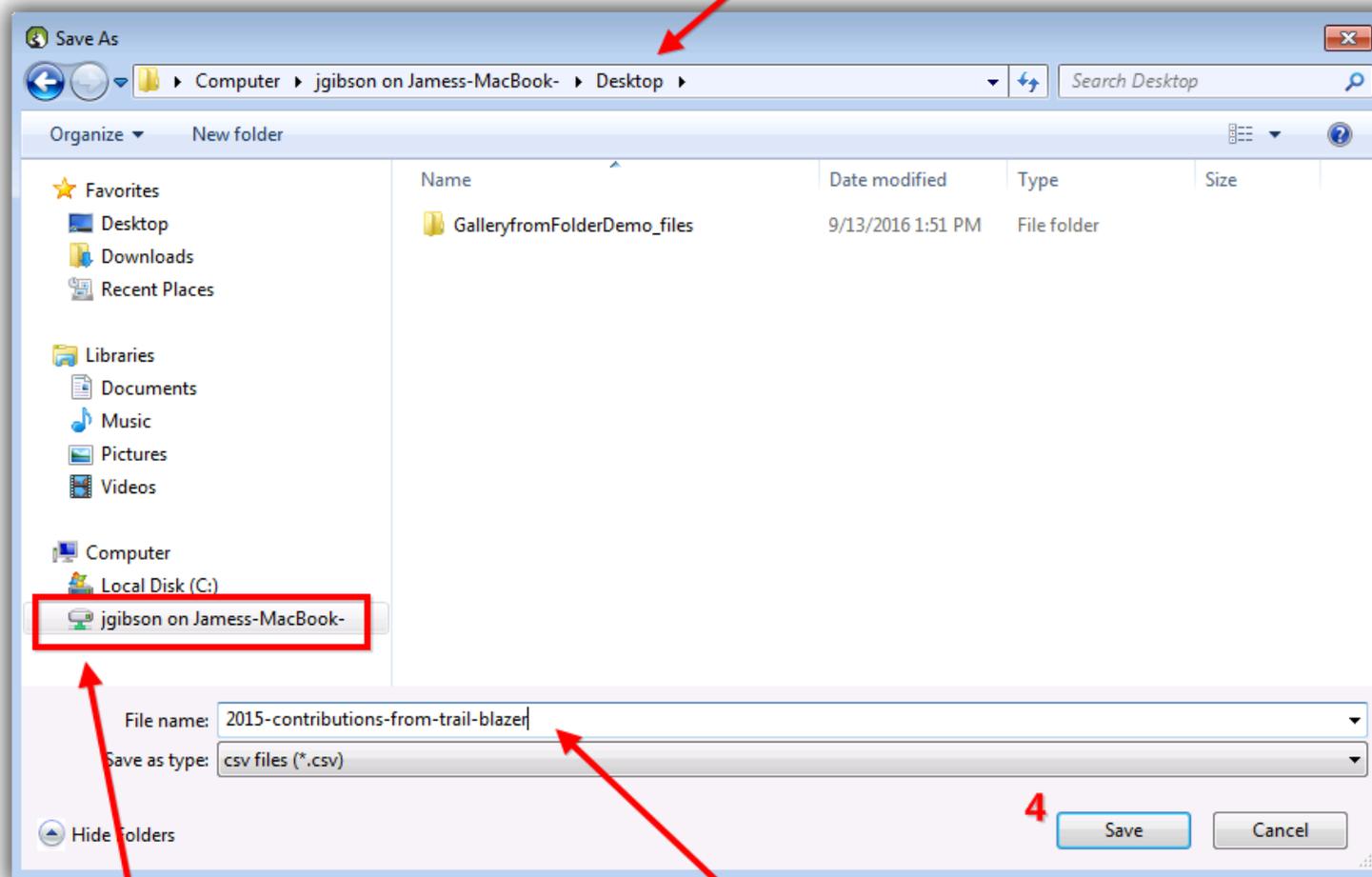
**If you get this warning while going through the export, click [OK] (sometimes 2x) and it will allow you to proceed.**

**11)** In the lower-left under the **Computer** drop-down you'll now see your Mac computer as an option to export to, **click on it**. *In this example it was called jgibson on Jamess-MacBook-*.



**12) Navigate to the directory** where you want to save your exported spreadsheet. Once you're there, **give the file a name** (*don't use any special characters, and leave it as a .CSV file type*), and then click **[Save]**. *Since I mapped all directories I had free rain of saving the file anywhere on the Mac, I selected the 'Desktop'.*

**2. Navigate to the directory where you want to save your spreadsheet i.e. Desktop, Downloads, Documents, etc.**

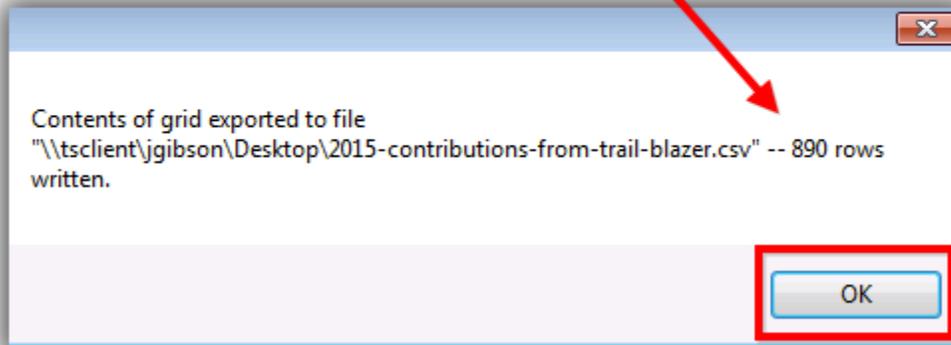


**1. Make sure your computer is selected.**

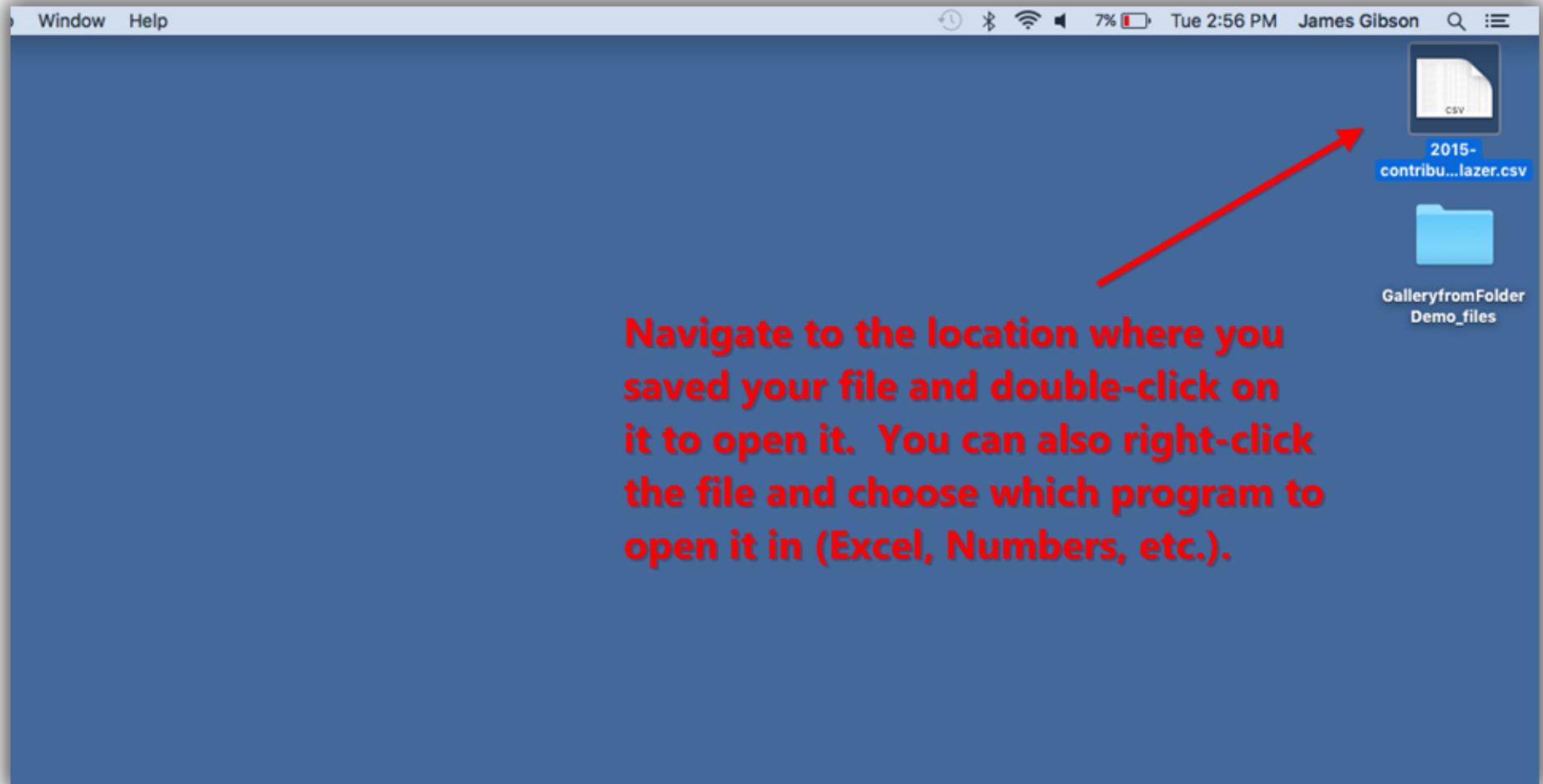
**3. Provide a file name AND leave the**

**13)** The process will run, and you'll get a popup message with the results once it's complete, click **[OK]** to finish. *In my example it exported 890 rows.*

**When the export is finished you'll get a popup message with the results.**

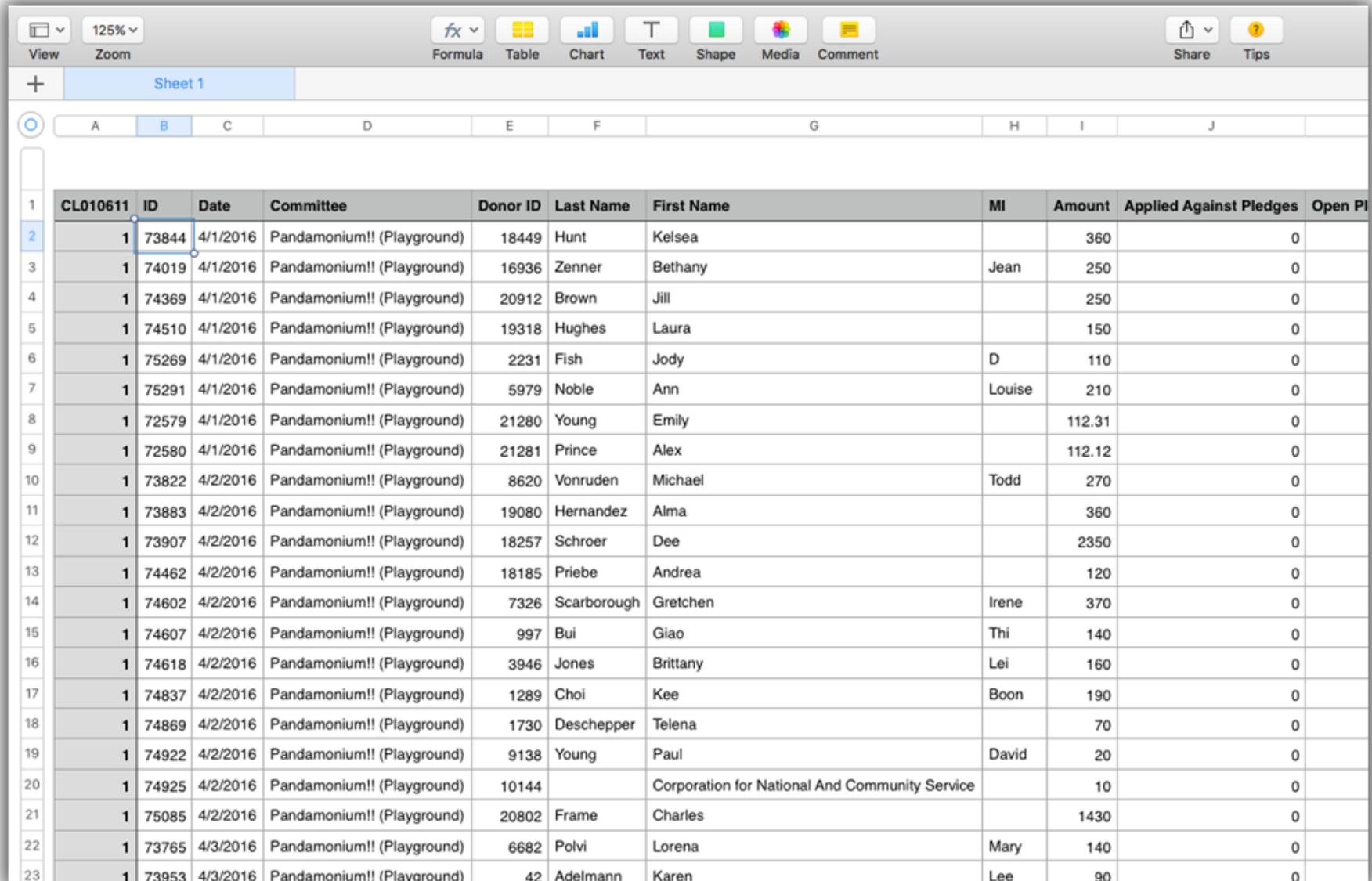


**14)** Minimize the remote desktop application, navigate to the location on your Mac where you saved the file, and double-click on it to open it. *In my example I saved it to the desktop of my mac. Tip: you can also right-click the file if you want to choose which program to open it in.*



15) Here's what my *example* looked like in the Numbers program:

## Example of an exported spreadsheet from Trail Blazer, opened in the Mac Numbers program.



	CL010611	ID	Date	Committee	Donor ID	Last Name	First Name	MI	Amount	Applied Against Pledges	Open P
1											
2	1	73844	4/1/2016	Pandamonium!! (Playground)	18449	Hunt	Kelsea		360		0
3	1	74019	4/1/2016	Pandamonium!! (Playground)	16936	Zenner	Bethany	Jean	250		0
4	1	74369	4/1/2016	Pandamonium!! (Playground)	20912	Brown	Jill		250		0
5	1	74510	4/1/2016	Pandamonium!! (Playground)	19318	Hughes	Laura		150		0
6	1	75269	4/1/2016	Pandamonium!! (Playground)	2231	Fish	Jody	D	110		0
7	1	75291	4/1/2016	Pandamonium!! (Playground)	5979	Noble	Ann	Louise	210		0
8	1	72579	4/1/2016	Pandamonium!! (Playground)	21280	Young	Emily		112.31		0
9	1	72580	4/1/2016	Pandamonium!! (Playground)	21281	Prince	Alex		112.12		0
10	1	73822	4/2/2016	Pandamonium!! (Playground)	8620	Vonruden	Michael	Todd	270		0
11	1	73883	4/2/2016	Pandamonium!! (Playground)	19080	Hernandez	Alma		360		0
12	1	73907	4/2/2016	Pandamonium!! (Playground)	18257	Schroer	Dee		2350		0
13	1	74462	4/2/2016	Pandamonium!! (Playground)	18185	Priebe	Andrea		120		0
14	1	74602	4/2/2016	Pandamonium!! (Playground)	7326	Scarborough	Gretchen	Irene	370		0
15	1	74607	4/2/2016	Pandamonium!! (Playground)	997	Bui	Giao	Thi	140		0
16	1	74618	4/2/2016	Pandamonium!! (Playground)	3946	Jones	Brittany	Lei	160		0
17	1	74837	4/2/2016	Pandamonium!! (Playground)	1289	Choi	Kee	Boon	190		0
18	1	74869	4/2/2016	Pandamonium!! (Playground)	1730	Deschepper	Telena		70		0
19	1	74922	4/2/2016	Pandamonium!! (Playground)	9138	Young	Paul	David	20		0
20	1	74925	4/2/2016	Pandamonium!! (Playground)	10144		Corporation for National And Community Service		10		0
21	1	75085	4/2/2016	Pandamonium!! (Playground)	20802	Frame	Charles		1430		0
22	1	73765	4/3/2016	Pandamonium!! (Playground)	6682	Polvi	Lorena	Mary	140		0
23	1	73953	4/3/2016	Pandamonium!! (Playground)	42	Adelmann	Karen	Lee	90		0

**16)** That concludes the steps. Typically I will resave an exported .csv as an Excel spreadsheet (.xlsx) so that it retains it's formatting. If you want to do this, either do a save-as (*if your Mac supports that option*), or in most cases select **File > Export**.

The **related resources** below link to a plethora of similar articles and videos. Give us a call if you have any trouble going through these steps on your Mac.



Trail Blazer™

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

## Related Resources

**Article:** [Configure Microsoft Remote Desktop – For Mac Users \(Logging into Trail Blazer on your Mac\)](#)

**Article:** [Copying Files From Macintosh to Remote Desktop](#)

**Article:** [Multiple Remote Desktop Connections on a Macintosh](#)

**Article:** [Walk List – Selectable Format](#)

**Article:** [How to Create a Year-by-Year Giving History Reporting using Filtered Contribution Columns in the Grid – Primarily for Nonprofits](#)

**Video:** [Reporting 103 – Format with various contribution columns](#)

**Video:** [Filtered Contribution Columns in Format](#)

**Video:** [Attributes – Add attribute dates and notes to your lists](#)

**Video:** [Getting Started 102 – Beginning Queries](#)

**Video:** [Getting Started 104 – Queries with Wildcards](#)

**Video:** [Reporting 105 – Pivots – summary reporting](#)

**Video:** [Reporting 102 – Quick Reports and Export](#)

**Video:** [Reporting 106 – Phone Bank List](#)

**Video:** [Reporting 104 – Joined Tables](#)

**Video:** [2X iPad Install and Configure](#)

**3<sup>rd</sup> Party Application:** [Microsoft Excel for Mac](#)

**3<sup>rd</sup> Party Application:** [Numbers App for Mac](#)

## 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.