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## **Overview**

This article is for **nonprofit** customers who want to collect and track gifts in honor or memory of someone. It walks through the steps to **add** the option to your **donation** <u>iFrame form</u>, and how to run **searches/reports** on the data once it's in your database.

**Tip:** Use the **Ctrl+F** hot key to jump to different sections of this article (example: "**#1**", "**#2**" or "**Related Resources**".

### **Outline**

**#1** Add the Memorial/Honorarium Option to your Online Donation Form

#2 Searching for Memorial/Honorarium Gifts in your Database

KNOWLEDGE BASE <u>www.trailblz.com/kb</u>



**#3** Build Reports (Add Columns) for Memorial/Honorarium Gifts **#4** Related Resources

## <u>#1 – Add the Memorial/Honorarium Option to your Online Donation Form</u>

To add this option to your online donation page (iFrame):



Powered by Trail <b>Blazer</b>	Share:	f in		
Comment	<ul> <li>Yes, I want to receive future email updates.</li> <li>Show my donation on the website ticker.</li> </ul>		Select a Restricted Allocation Fund Below         .00       2016 Disaster Relief Fund         .00       2016 General Fund	
Volunteer Assist with Even I will work on Taking Registe	ent planning your newsletter rations at Events		.00     2016 Scholarship Fund       Make my donation in Honor or Memory of       Honor or	
Select Rider to Chad Dan Jim Joel Kevin	Support		Memory Please enter *Full Name* & *Address*	a donation in
Mark Pat Sue Tom	our email preferences		Employment Information     memory       Required by Federal and State Election Laws     some of the second	ry or honor of one.
Annual newsle Critical update Monthly news Please never o Quote of the	etter es only regarding major news letter contact me by email day notifications		Payment  Credit Card Bank Account eCheck  SISA	



You'll need to check the Include Honor of box in website configuration:



Memorial & Honorarium Gifts – Add the Option to your Online Donation

Settings Help											
Application Menu «	File - Edit - 🛛	) 🤌 Iframe	Wizard								
	Site Title:	Demo Nor	nprofit - Joe	l		Refresh web pag	ges				
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Dashboard	Meta Keywords:					updated specifi	cauons.				
Calendar/Tacks	Theme Name:	default									
S Canvassing	Flat China in Fast	00									
De Contact	Flat Shipping Fee:	.00									
Communications	🔲 Enable double C	pt-In for all for	orms								
Financial											
A 🍫 System Manager	Site Settings Cale	ndar Events	Donations	Signup Email	Signup Short	Signup Without	Attributes	Signup Attributes S	ignup Post		
System Gallery	Page Setup Don	ation Amount:	s Recurring	Frequency F	Related Lists E	Email Response	Live Previ	ew (Donations.aspx?ve	er=2)		
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Payment Gateway	Pre-Check Ema	ail Opt-In				chrs chrs con	an styl	e-"font_weight:	hold:"N	For the	
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honor of option	Include Donatio	in Other Amo	orietien(e)			Attribute Fol	der 3:	Please select your en	mail prefere	nces 🔻	
on for your	M Include Donalio	n Lever Des	cription(s)			Attribute Fol	der 4:	<no folder=""></no>		<b>•</b>	
	Include Donation	n Ticker				Labels					
donation form.	Ticker Size:	10				Contact Box:					
	Ticker Start D	ate: 🔽 6	5/16/2016	•		Amount Box:					
	Display Position o	f Donation Ar	mount(s)			Frequency:					
	Location:				•	Button:	Do	nate Now			
						Fund Box:	Sel	ect a Restricted Alloc	ation Fund	Below	
						Honor Box:	< b	> Please enter *Full N	lame* & *A	ddress*	



This requires appropriate security clearance.

After that setting is turned on you'll **need** to click **[Save]** in the bottom-right, and then click the **blue** hyperlink in the top-right that says **'Click here to refresh your web pages using updated specifications'**.



Memorial & Honorarium Gifts – Add the Option to your Online Donation

File - Edit - 🖗	🌮 Iframe Wizard								
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Meta Description:		Click here to refresh	your web pages using						
Meta Keywords:		updated specification	<u>s.</u>						
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Flat Shipping Fee:	.00		2						
Enable double Op	pt-In for all forms								
Site Settings Calen	ndar Events Donations Signup Email Signup Short	Signup Without Attribut	tes Signup Attributes Signup Post						
Page Setup Dona	tion Amounts Recurring Frequency Related Lists	Email Response Live Pr	review (Donations.aspx?ver=2)						
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Is Email Address	s *Required	Include *Required C	Confirm Eligibility Checkbox						
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Include Donation	n Ticker	Labels							
Ticker Size:	10	Contact Box:							
Ticker Start Da	ite: 📝 6/16/2016 🔻	Amount Box:							
Display Position of	Donation Amount(s)	Frequency:							
Location:	•	Button:	Donate Now						
		Fund Box:	Select a Restricted Allocation Fund Below						



**Tip:** You can adjust the **label** in this area as well. For instance you may want to request that the donor enters the **address** for the person the gift was made in honor/memory of, among other things. *My example of this modification is below.* 



Memorial & Honorarium Gifts – Add the Option to your Online Donation

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	🔽 Is Email Address	*Required	Include *Required C	Confirm Eligibility Checkbox	
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	Include Donation	Ticker	Labels		
	Ticker Size:	10	Contact Box:		Tip: you can change the
	Ticker Start Dat	te: 🚺 6/16/2016 👻	Amount Box:		np. you can change the
	Display Position of	Donation Amount(s)	Frequency:		memory/honor-of label
	Location:	<b></b>	Button:	Donate Now	that displays on your
			Fund Box:	Select a Restricted Allocation Fund Below	that also ays on your
			Honor Box:	<b>Please enter *Full Name* &amp; *Address*</b>	donation form here.



# <u>#2 – Searching for Memorial/Honorarium Gifts in your Database</u>

When someone gives a gift through your donation form that's in honor or memory of someone, like this example:



Trail <b>Blazer</b>	Share: 🗗	in	🗄 🛨 G+1 (0			
* zip cou	e 55427	Т				
* Phon	e (866) 909-8700		Make my d	onation		
* Ema	il jkristenson@trailblz.com		Single One Tir	ne Donation	-	
	<ul><li>Yes, I want to receive future email updates.</li><li>Show my donation on the website ticker.</li></ul>		Select a Re	stricted Allocation Fund Below		
Commer	t You rock my socks off!		10 20	16 Disaster Relief Fund		
			10 20	16 General Fund		
Volunteer		5	10 20	16 Scholarship Fund		
	vont phoning		\$30.00 of \$4	5.00 allocated.		
<ul> <li>✓ Assist with E</li> <li>I will work or</li> <li>✓ Taking Regis</li> </ul>	vent planning 1 your newsletter trations at Events		Make my do	nation in Honor or Memory of		
			Honor	or In memory of	•	
Select Rider t	o Support		Please en	ter Steve Jobs		
Chad			*Full Name* *Addres	&         2066 Crist Dr.           Los Altos, California 90210	-	
Jim						Example m
Joel						
Mark						
Pat			Employment	Information		
Sue			Required by Fe	deral and State Election Laws		
Tom			* Employ	/er Trail Blazer		
			* Occupat	on Professional Dishwasher		
Please select	your email preferences					
Annual news	letter		Payment			
✓ Critical upda	tes only regarding major news		Credit Car	1		



The **details** display on the **email receipt** your database admins should <u>receive by email</u> as well as the receipt the donor gets automatically:



r	<u>ک 10 🚽 ا</u>		Donation Ac	cepted - Single - \$45.00 by J	oel Kriste	enson - Messag	je (HTML)				x
	File Messag	je								۵	•
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	From: Demo To: Joel K Cc: Subject: Dona	Nonprofit íristenson ation Acce	Joel <jkristenson@trailblz.com> pted - Single - \$45.00 by Joel Kr</jkristenson@trailblz.com>	istenson		Move	1895 13	Sent: W	ed 11/2,	/2016 2:42	2 PM
	This sender fa	iled our f	raud detection checks and may	not be who they appear to	be. Learr	about <u>spoofin</u>	9		E	eedback	82
	Name on Ca	ard	Joel Kristenson								
	Donor Name Street Street 2 City State ZipCode	e	Joel Kristenson 9110 Golden Valley Apt. 10 Golden Valley MN 55427	Rd Details of a	mei	norial	gift will disp	olay			
	Phone Email		(866) 909-8700 jkristenson@trailblz.	com				р.			
	Amount Honor or Me of:	emory	\$45.00 Steve Jobs 2066 Cri	st Dr. Los Altos, Calif	fornia	90210					
	Comments: You rock my s	socks of	f!				-				<b>•</b>



You can run <u>search queries</u> for these gifts in the **Contributions** list under the **Memory/Honor** tab.

In my 1<sup>st</sup> example below I searched for all gifts made in honor of anyone by selecting that option from the drop-down menu:



Memorial & Honorarium Gifts – Add the Option to your Online Donation





You can filter the search further by the **specific person** a gift was made in honor/memory of. In my 2<sup>nd</sup> *example* I filtered to all gifts made **in honor** of Steve Jobs:



If you run these searches often, you can save them as a <u>favorite</u> for future use. It may be useful to use <u>sql wildcards</u> with these searches as well, for instance if you don't know the **exact spelling** of the memorial/honorary person.

You'll notice that be default there aren't any columns related to memorial gifts in the report:



Memorial & Honorarium Gifts – Add the Option to your Online Donation Forms, and How to Run Searches and Build Reports on these Type of Gifts in the Database



#### By default there aren't any columns related to memorial gifts in the Contributions list.

-	🛿 Search ≽ Reset   💠 New   🚍 🥅 🗁   🔚 🜁 🤔 🧐   File 🕶 Edit ->   🎯   Apply to Pledges   Contributions																				
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Con	tributi	ons [ 82 re	cords found ]																		
	<b>V</b>	ID 🔺	Date	Contact ID	Last Name	First Name	MI	Amount	Applied Against Pledges	Open Pledges [Per Contact]	Deposited	Thank You Letter Sent	Thank You Date	Thank You Call Done	Check #	Street	Street 2	City	State	Zip Code	Deposit Date
►		<u>3625</u>	11/30/2010	Z	<u>Aanenson</u>	<u>Pamela</u>	Marie	230.00	.00	.00		V				3896 White Bear Ave		White Bear La	MN	55110	
	V	3626	11/30/2010	<u>10964</u>	<u>McSpadden</u>	Laur	Marie	10,000.00	.00	.00		<b>V</b>				604 College Ave		New Paris	IN	46553	
	<b>V</b>	<u>3655</u>	12/16/2010	<u>10970</u>	Diaz	<u>Elizabeth</u>		100.00	.00	.00						123 E Minnehaha	Suite 22	MpIs	MN	55555	
	<b>V</b>	<u>3906</u>	12/22/2010	<u>10974</u>	Adams	<u>Leticia</u>		100.00	.00	.00						1597 87th Ave S		Minneapolis	MN	55402	
	V	<u>3907</u>	12/23/2010	<u>10976</u>	Lloyd	<u>Chelsea</u>		575.00	.00	750.00		<b>V</b>				401 Richmond St W		Toronto	ON	M5V 388	
	<b>V</b>	<u>3910</u>	12/29/2010	<u>10979</u>	Bass	Carly		275.00	.00	500.00						7896 Cumberland Ave W		Santa Barbara	CA	93101	
	$\checkmark$	<u>3913</u>	1/4/2011	<u>11072</u>	<u>Ullman</u>	<u>Talia</u>		250.00	.00	3,000.00		<b>V</b>				7893 Washington St		Salt Lake City	UT	84101	
	<b>V</b>	<u>3914</u>	1/7/2011	<u>11075</u>	Gerdts	Amy		276.00	.00	2,000.00		<b>V</b>				1596 47th Ave S		Concordia	MO	64020	
	<b>V</b>	<u>3916</u>	1/7/2011	<u>11077</u>	Pierce	Vanessa		300.00	.00	.00		<b>V</b>				1234 Washington St E		Salt Lake City	UT	84121	
	<b>V</b>	<u>3917</u>	1/6/2011	<u>11079</u>	Lollar	Amanda		600.00	.00	.00		<b>V</b>				1593 Batdrive E		Mineral Wells	TX	76067	
	V	<u>3918</u>	1/6/2011	<u>11080</u>	Bischoff	Sara		750.00	.00	.00		<b>V</b>			123485	3633 Aldrich Ave S		Minneapolis	MN	55409	
	<b>V</b>	<u>3919</u>	1/18/2011	<u>11082</u>	Winheim	Joy		500.00	.00	.00		<b>V</b>			500	15978 Washington Blvd		Tampa	FL	33603	
	<b>V</b>	<u>3922</u>	2/10/2011	<u>11090</u>	Marrinan	Michael	Gordon	100.00	.00	.00		<b>V</b>				3458 Indiana Ave N		Robbinsdale	MN	55422	
	<b>V</b>	<u>3923</u>	2/25/2011	<u>11092</u>	Griffith	Mary		1,000.00	.00	750.00		<b>V</b>				1597 45th Ave S		Chicago	IL	60647	
	<b>V</b>	3925	7/22/2011	<u>11094</u>	Garretson F	Susan		500.00	.00	.00		<b>V</b>				123 E Minnehaha	Suite 22	MpIs	MN	55555	
		3929	3/1/2011	11097	Fairbanks	Chelsea	Deann	875.00	.00	.00		<b>V</b>				7891 MountCurve Blvd		St Paul	MN	55116	
	<b>V</b>	3930	3/2/2011	11099	Miller	Amy	Michele	777.00	.00	.00		<b>V</b>			1597	123 E Minnehaha	Suite 22	MpIs	MN	55555	
		3933	3/4/2011	11102	Roehl	Mary	Sue	757.00	.00	3,000.00		<b>V</b>				159 Hampton Blvd E		Loretto	MN	55357	
		3936	3/8/2011	11106	Hanson	Heidi	Rae	75.00	.00	.00		<b>V</b>			1597	14961 Sumter Ave S		Savage	MN	55378	
		3937	3/7/2011	11109	Nascimento	Nathan		250.00	.00	.00					1596	123 E Main		Norfolk	VA	23510	
		3938	3/14/2011	11111	Kentsa-Siaka	Alvine	Laure	1.500.00	.00	.00						7265 146th Way W		Apple Valley	MN	55124	
		4144	3/15/2011	11115	Taylor-Nani	Sarah	Elizabeth	159.00	.00	.00						1808 Englewood Ave		St Paul	MN	55104	
		4149	3/22/2011	11120	Crawford	Kimberly	Rose	1.000.00	.00	.00						102.1 st St W		Duluth	MN	55802	
		4150	3/24/2011	11121	Beecroft	Lisa	Marie	2 000.00	.00	.00						3755 Auger Ave		White Bear La	MN	55110	
		4151	3/25/2011	11127	Myers	Timothy		650.00	.00	.00						159 Main St		Fountain Valley	CA	92708	
		4154	3/28/2011	11131	Laszewski	Jill	Diane	600.00	.00	3.000.00					1597	7 Sandra Lee Dr F		St Paul	MN	55119	
		4155	3/30/2011	11134	Hernandez	Bradley		575.00	.00	1 500.00					1597	123 F Main		Norfolk	VA	23510	
		4156	7/22/2011	11135	Lewis	Shareta		500.00	.00	.,						1597 Evanston Blvd		Toledo	он	43607	
		4157	4/11/2011	11137	Willey	Lisa		1 000 00	.00	.00						7896 Anderson Pkww		Southwest Ha	ME	04679	
		4161	7/22/2011	11145	Lasalvia	lames		500.00	.00	3 600.00						123 F Main		Norfolk	VA	23510	
		4162	7/22/2011	11147	Landers	Varr		800.00	.00	0,000.00						123 E Main		Norfolk	VA	23510	
		4163	7/22/2011	11140	Hill	Pachal		1 000 00	.00	.00						123 E Main		Norfolk	VA	23510	4/18/2011
		4167	A/22/2011	11154	Eucipi Sado	Rianca		2,000.00	.00	8 000 00						1902 Greeley ST S	Apt 4	Stillwater	MN	55082	4/10/2011
		4169	4/22/2011	11162	Staavas	Chand	lunn	00.00	.00	8,000.00					1501	576 Idaho Ave 5	Apt 4	Stillwater	MN	55062	
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Σ	82							138,888.31	1,125.00		1	79		5							



The next section will show how to add these columns via <u>formatting</u>, and how to **preserve** these formats for future use.

## <u>#3 – Build Reports (Add Columns) for Memorial/Honorarium Gifts</u>

To **add in** the information for memorial/honorarium gifts you'll start by clicking the **[Format]** button, and select **'Columns...'**.



🤝 Search 🔖 Reset | 🕂 New | 🚍 🛅 😁 | 拱 🌁 🤔 🧊 | File 🗸 Edit 🤟 🎯 | Apply to Pledges | Contributions 0 Memory/Honor Other Gateway Contact SQL General Favorites 0 Type: in honor of . Person: 📑 Edit 🛛 🌐 Sort 🜐 Format 🗸 🚍 Wrap 🛛 🐴 Export 🔈 Print 🖉 Pivot JAK ⊞ Columns... Open Thank Applied Thank First Pledges You 1 ID MI Amount Against Deposited You Select saved... Name [Per Letter Pledaes Date Sent ict] Add or remove columns, apply formatting, or specify column attributes. H Save 3625 .00 1 230.00 .00 Pamela J) Save As... 1  $\checkmark$ 3626 dden Laur Marie 10,000.00 .00 .00 Assign as default... 1 V **⊞** <u>3655</u> **Elizabeth** 100.00 .00 .00 1 V 12/22/2010 10974 Leticia 100.00 .00 .00 3906 Adams 1 V 750.00 3907 12/23/2010 10976 Lloyd <u>Chelsea</u> 575.00 .00 1 V 500.00 3910 12/29/2010 10979 Bass Carly 275.00 .00 1 V 3913 1/4/2011 11072 250.00 .00 3,000.00 Ullman <u>Talia</u> J 7 3914 1/7/2011 11075 Gerdts 276.00 .00 2 000.00 Amv



Scroll down the list of columns on the right that are attached to the **'Contribution'** table, and check the boxes for **MemorialPerson** and **MemorialTypID**.



Column Selection		
Table Contribution Joined Tables  I Contribution I Contribution I Contribution I Contribution I Contact I Address [Default Display] Address [Home] Address [Mailing] Address [Registrum] Address [Registrum] Address [Work I I Address [Work I I I I I I I I I I I I I I I I I I I	Columns [Contribution] MarketNotionExtensionTotal MarketNotionQtyTotal MatchingContributionsExpected MatchingContributionsReceived MemorialContactID MemorialPerson MemorialTypeID MemoText NameOnCreditCard NonMonetaryDescription NonMonetaryRate NonMonetaryRate NonMonetaryRate NonMonetaryTypeld NotifyCount OriginalLiabilityDate PartnerCtrID	
Progress Check the boxes for Mer MemorialTypeID.	morialPerson and iorial	Cancel



You'll then need to scroll down the list in the **bottom-left** under **Joined Tables**, and select the **Memorial Type** table.

After the **Memorial Type** table is highlighted, check the box on the right for **Description**.



Column Selection	
Columns       Format         Table       Contribution         Image: Contribution       Image: Contribution         Joined Tables       Image: Contribution         Image: Contribution       Image: Contribution         Image: Contribution<	ype] tion alTypeID
Progress	OK Cancel



This is the column of data that will display and comment/note the donor may have made regarding the memorial/honorarium gift.

Once you're finished selecting the columns you need, click **[OK]**. You can certainly select more information here if you need to (i.e. phone, email, etc.) as well as remove columns that aren't of importance for your report.



Colum	nn Selection			
Columns Table —	Contribution	Colu	mns [Memorial Type]	
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The related resources below link to a variety of videos and articles related to this topic.



YouTube Channel

- Knowledge Base Articles

- 3rd Party Resources



### **Related Resources**

Article: Save and Load a Search Query as a (Dynamic) Search Favorite Article: SQL Wildcards Article: Inserting Contribution Transactions In Donor Merge Letter Article: How to Delete or Rename a Saved Search Favorite (Query) Article: Tax Deductible Contributions Article: Recording Non-Monetary (In-Kind) Contributions and Creating New Non-Monetary Types **Article:** Matching Contributions Article: Contributions Year-End Report **Article:** Enter Contributions Video: Getting Started 102 Beginning Queries - Nonprofit Video: Reporting 102 – Quick Reports and Export Video: Getting Started 107 – Writing Contribution Thank You Letters Video: Write Letter – Edit Letter after Mail Merge Video: <u>Reporting 104 – Joined Tables</u> Video: Reporting 105 – Pivots – summary reporting Video: Getting Started 104 Queries with wildcards Video: Favorite – Update and Delete Favorite Video: Getting Started 106a – Entering Contributions (NON PROFIT ONLY) Video: Reporting 103 – Format with various contribution columns Video: Getting Started 107 – Writing Contribution Thank You Letters



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\* As a policy we require that you have taken our intro training class before calling or emailing our live support team.

<u>*Click here*</u> 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 <u>GoToMeeting</u> session where we host our live interactive trainings.

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