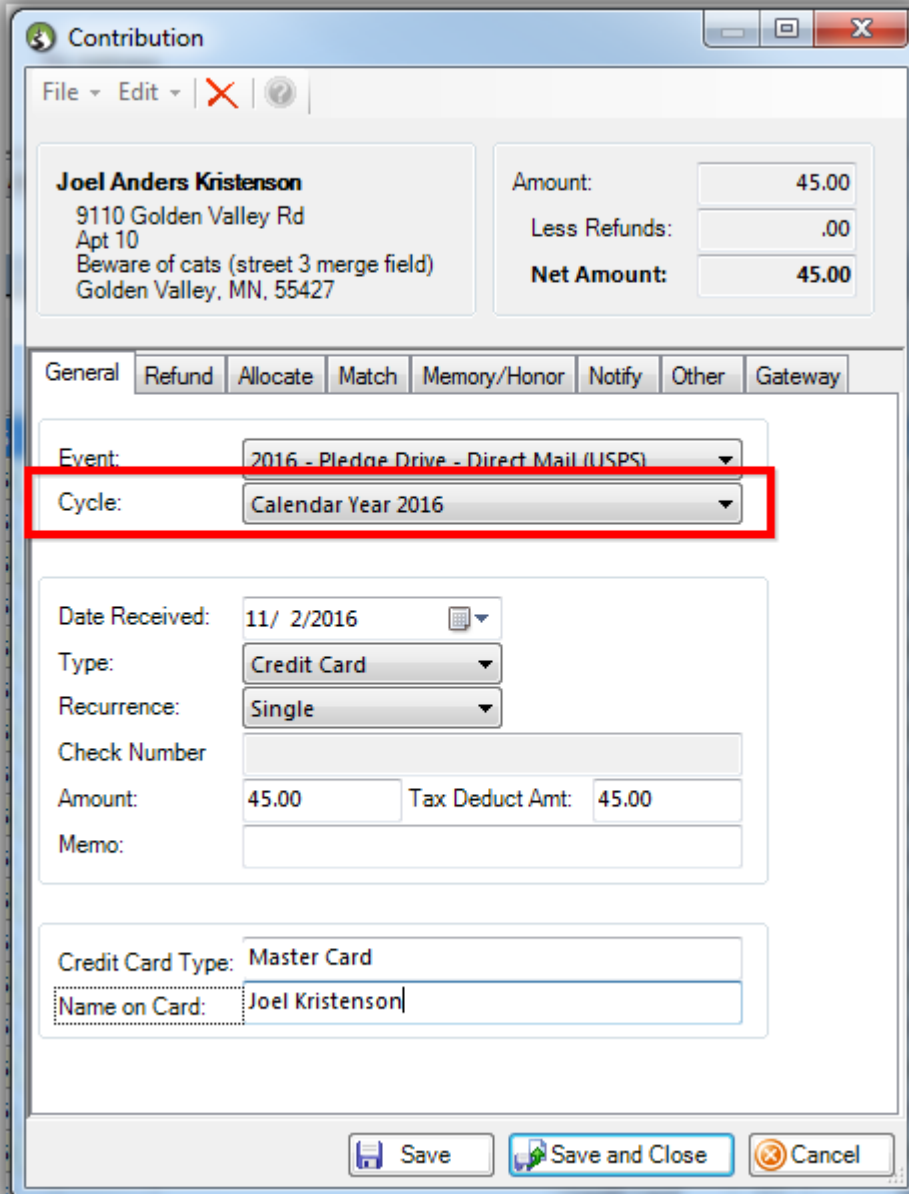


Author: Kristenson, Joel
Last Updated: 2016-12-30

Overview

This article provides a quick walk-through on how to change your default **cycle** or **fiscal year** in your database so all **new donations** are automatically categorized as such. It also shows how to check your current list of cycles and add a new one if it hasn't been created yet. *Typically this task is taken care of once a year at the end of the current cycle, and the beginning of a new one.*

Scenario: When [entering a physical donation](#) (cash/check/in-kind...), or when they come in through your [website](#), they will be 'flagged' with the default cycle here:



Contribution

File Edit X ?

Joel Anders Kristenson
9110 Golden Valley Rd
Apt 10
Beware of cats (street 3 merge field)
Golden Valley, MN, 55427

Amount: 45.00
Less Refunds: .00
Net Amount: 45.00


General Refund Allocate Match Memory/Honor Notify Other Gateway

Event: 2016 - Pledge Drive - Direct Mail (USPS)
Cycle: Calendar Year 2016

Date Received: 11/ 2/2016
Type: Credit Card
Recurrence: Single
Check Number:
Amount: 45.00 Tax Deduct Amt: 45.00
Memo:

Credit Card Type: Master Card
Name on Card: Joel Kristenson

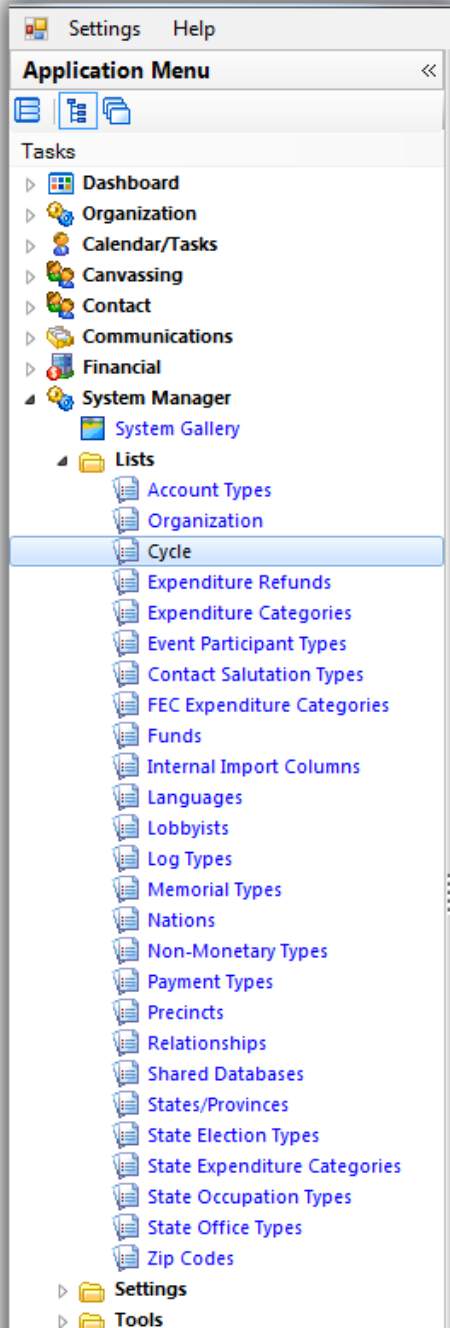
Save Save and Close Cancel

 **Tip:** For a more **in-depth** walk-through read [this article](#) which covers things like **mass updating** a list of donations to a **specific cycle** en masse. This is very useful if a large amount of contributions weren't 'keyed' correctly to the correct cycle – instead of going one-by-one you can mass update the whole batch to correct the problem.

Steps

First you'll want to **verify** that the **next** cycle/fiscal year has been created in your database, and **add a new one** *if* it isn't.

Navigate to the **Cycle** list by following **Application Menu > System Manager > Lists > Cycle**.



Verify that the **current** and **next** cycles are present, and then move on to the next steps. If they don't exist yet, click **[+ New]** from the **search** tool strip and create new ones. *In my example I created one new cycle for 2018.*

2. *If you need to create new cycles, click [+ New].

The screenshot shows the TrailBlazer interface with a table of cycles. A dialog box titled 'Create New Cycle Card' is open, showing the process of creating a new cycle for 2018. Red annotations highlight the following steps:

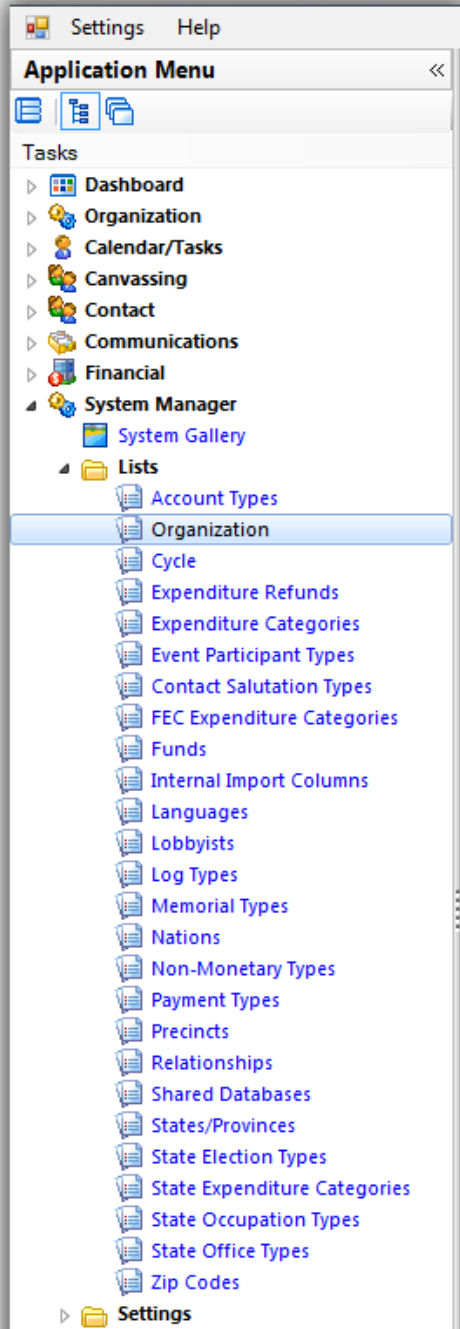
- 1.** Verify that your 'current' and 'next' cycles are present in the list. (Points to rows 29 and 30 in the table)
- 2.** *If you need to create new cycles, click [+ New]. (Points to the '+ New' button in the toolbar)
- 3.** (Points to the 'Create New Cycle Card' dialog box, which contains:
 - Cycle: Calendar Year 2018
 - General tab
 - Cycle Info section with:
 - Cycle Start Date: 1/ 1/2018
 - End Date: 12/31/2018
 - Logon = Joel K. [Save] [Save and Close] [Cancel]
- 4.** (Points to the 'Save and Close' button in the dialog box)

ID	CycleDescription	Start Date	End Date
6	Calendar Year 1992	1/1/1992	12/31/1992
7	Calendar Year 1993	1/1/1993	12/31/1993
8	Calendar Year 1994	1/1/1994	12/31/1994
9	Calendar Year 1995	1/1/1995	12/31/1995
10	Calendar Year 1996	1/1/1996	12/31/1996
11	Calendar Year 1997	1/1/1997	12/31/1997
12	Calendar Year 1998	1/1/1998	12/31/1998
13	Calendar Year 1999	1/1/1999	12/31/1999
14	Calendar Year 2000	1/1/2000	12/31/2000
15	Calendar Year 2001	1/1/2001	12/31/2001
16	Calendar Year 2002	1/1/2002	12/31/2002
17	Calendar Year 2003	1/1/2003	12/31/2003
18	Calendar Year 2004	1/1/2004	12/31/2004
19	Calendar Year 2005	1/1/2005	12/31/2005
20	Calendar Year 2006	1/1/2006	12/31/2006
21	Calendar Year 2007	1/1/2007	12/31/2007
22	Calendar Year 2008	1/1/2008	12/31/2008
23	Calendar Year 2009	1/1/2009	12/31/2009
24	Calendar Year 2010	1/1/2010	12/31/2010
25	Calendar Year 2011	1/1/2011	12/31/2011
1	Calendar Year 2012	1/1/2012	12/31/2012
26	Calendar Year 2013	1/1/2013	12/31/2013
27	Calendar Year 2014	1/1/2014	12/31/2014
28	Calendar Year 2015	1/1/2015	12/31/2015
29	Calendar Year 2016	1/1/2016	12/31/2016
30	Calendar Year 2017	1/1/2017	12/31/2017

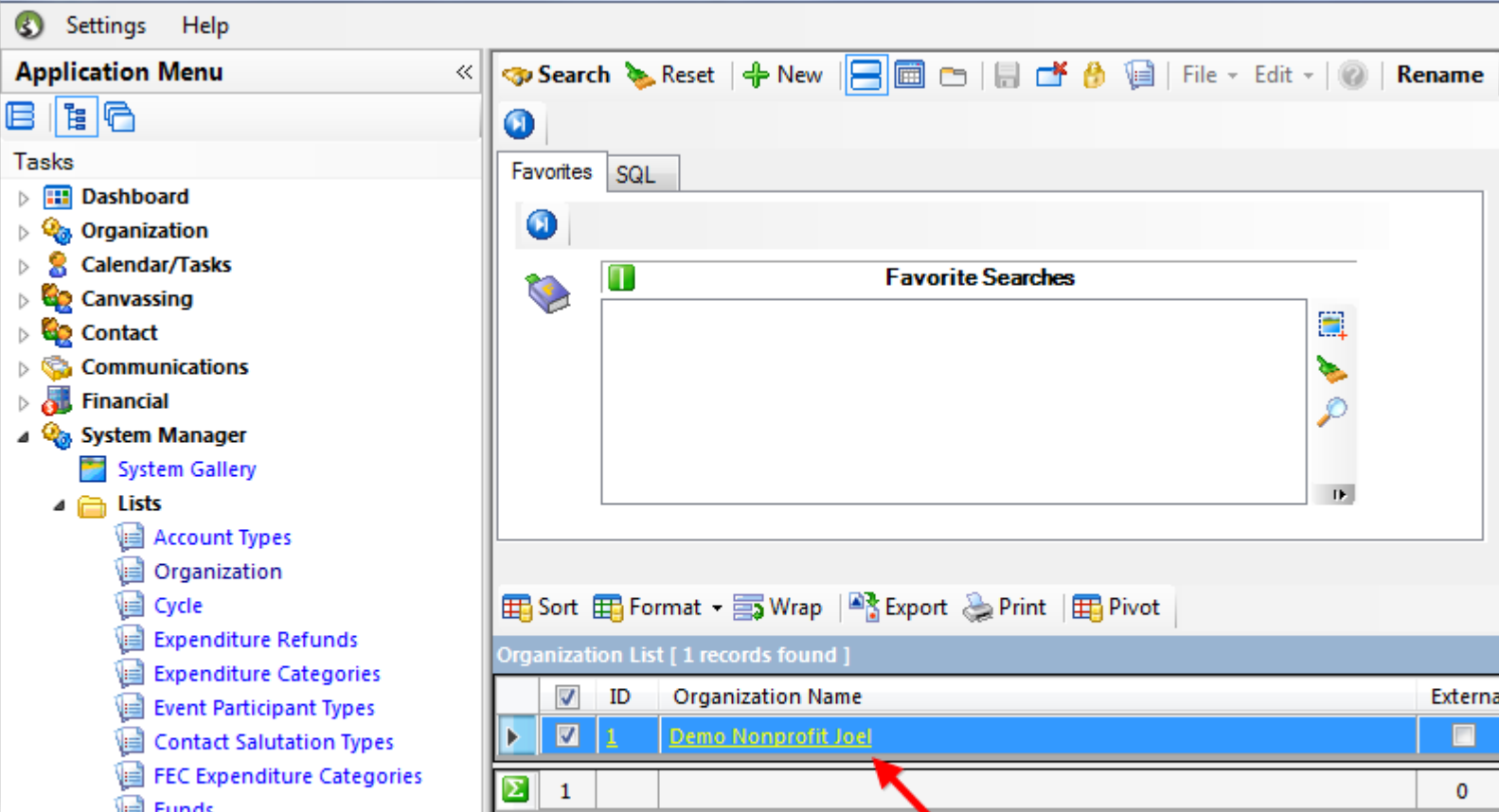
1. Verify that your 'current' and 'next' cycles are present in the list.

Once the cycles have been created or you verify that they are already present it's time to set the default for your database.

Under the **Application Menu** open the **Organization** list by following **Application Menu > System Manager > Lists > Organization** (*requires [security clearance](#)).



Click on the **organization 'name'** from the list to open your org record.



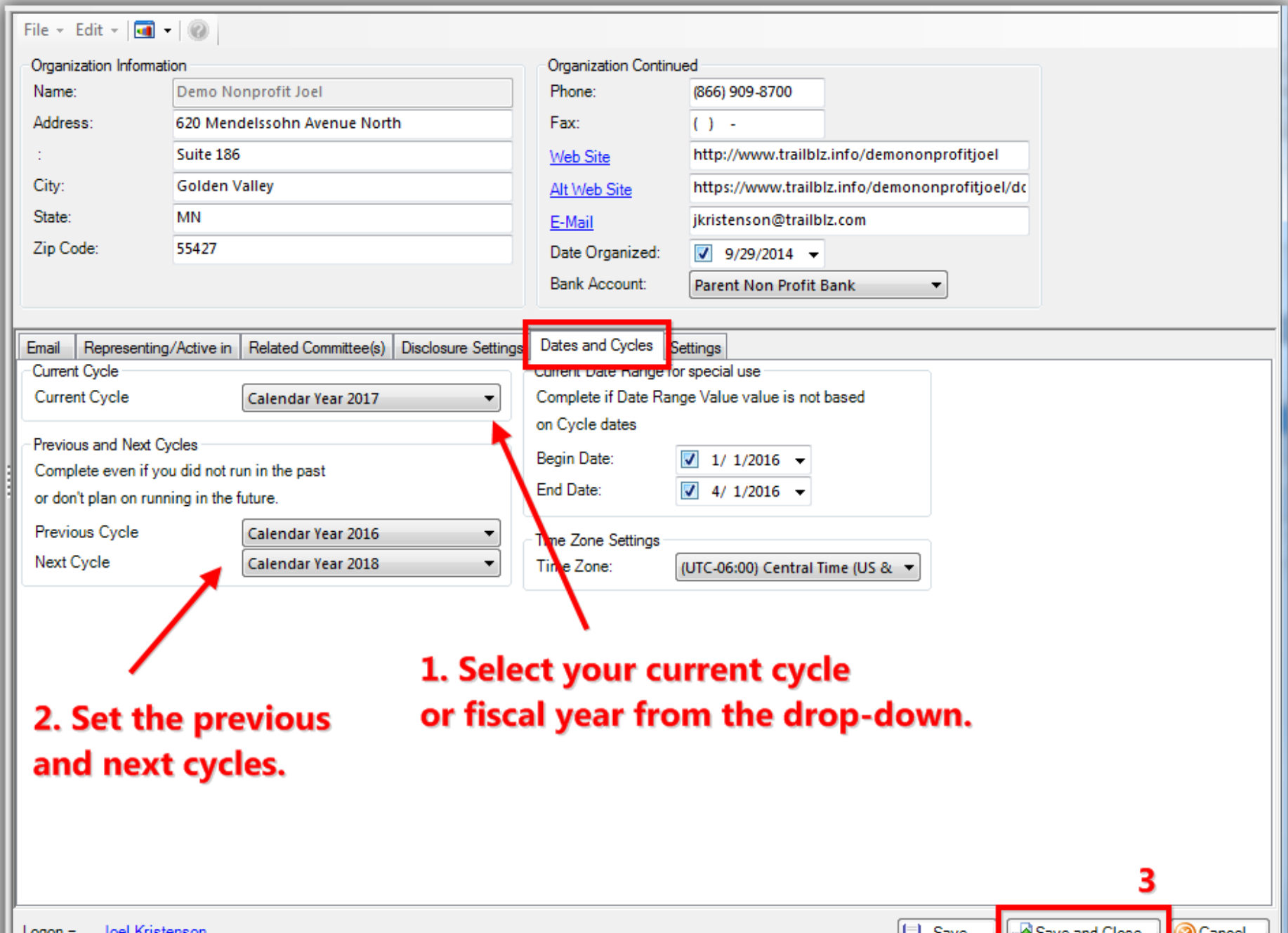
The screenshot shows the TrailBlazer application interface. On the left is the 'Application Menu' with a tree view of tasks including 'System Manager' and 'Lists'. The main area displays a table titled 'Organization List [1 records found]'. The table has columns for 'ID', 'Organization Name', and 'External'. The first row is highlighted in blue and contains the value '1' in the ID column and 'Demo Nonprofit Joel' in the Organization Name column. A red arrow points to the 'Demo Nonprofit Joel' text.

	ID	Organization Name	External
<input checked="" type="checkbox"/>	1	Demo Nonprofit Joel	<input type="checkbox"/>

Open the organization record card.

Navigate to the **Dates and Cycles** tab. Select your **current cycle** from the drop-down, as well as the **previous**, and **next** cycles.

Click [**Save and Close**] to finish. *My example is below where I set the default cycle to 2017.*



File Edit [Icons]

Organization Information

Name: Demo Nonprofit Joel
Address: 620 Mendelssohn Avenue North
Suite 186
City: Golden Valley
State: MN
Zip Code: 55427

Organization Continued

Phone: (866) 909-8700
Fax: () -
Web Site: http://www.trailblz.info/demononprofitjoel
Alt Web Site: https://www.trailblz.info/demononprofitjoel/dc
E-Mail: jkristenson@trailblz.com
Date Organized: 9/29/2014
Bank Account: Parent Non Profit Bank

Email Representing/Active in Related Committee(s) Disclosure Settings **Dates and Cycles** Settings

Current Cycle
Current Cycle: Calendar Year 2017

Previous and Next Cycles
Complete even if you did not run in the past or don't plan on running in the future.

Previous Cycle: Calendar Year 2016
Next Cycle: Calendar Year 2018

Current Date Range for special use
Complete if Date Range Value value is not based on Cycle dates
Begin Date: 1/ 1/2016
End Date: 4/ 1/2016

Time Zone Settings
Time Zone: (UTC-06:00) Central Time (US &

1. Select your current cycle or fiscal year from the drop-down.

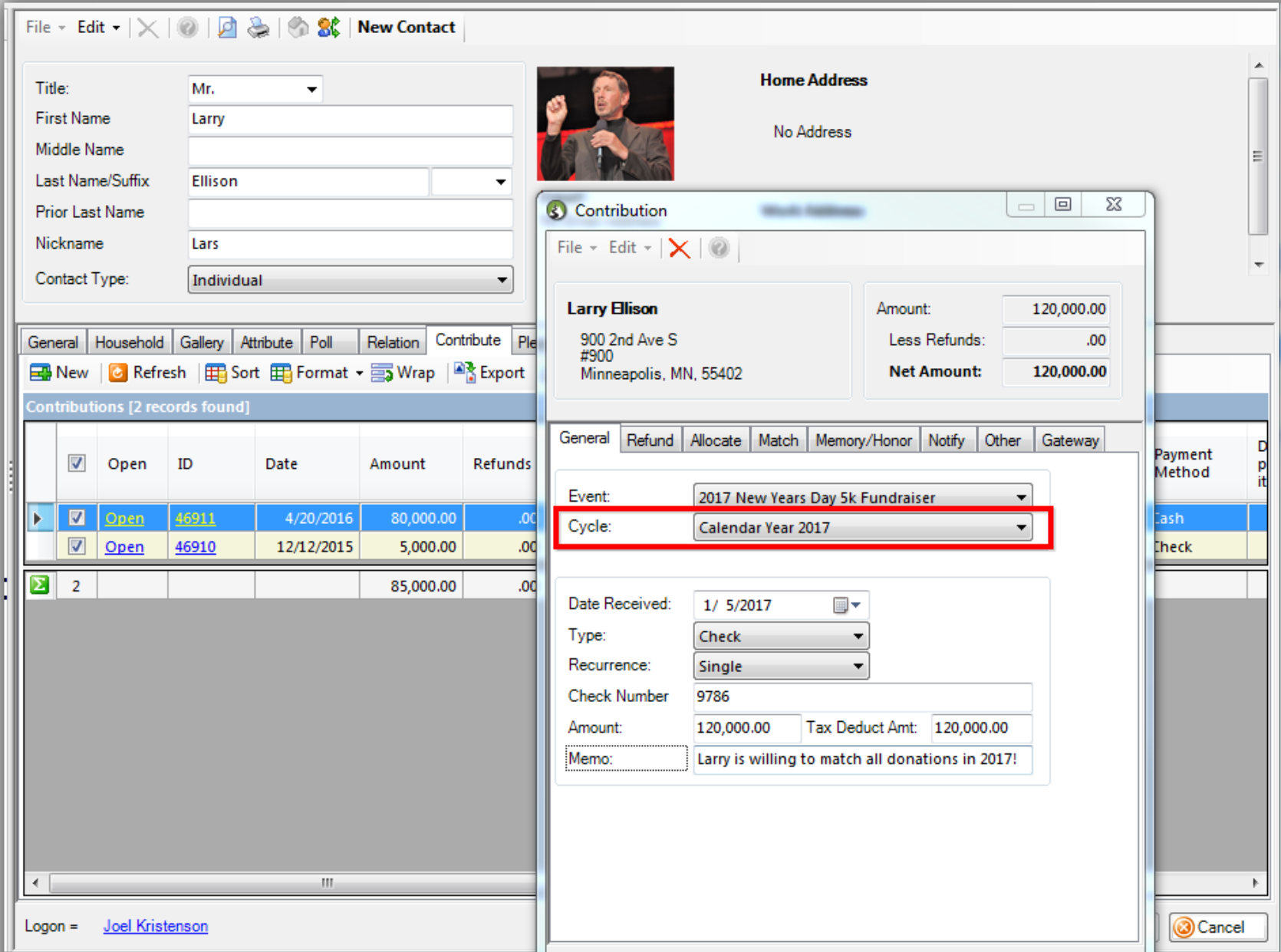
2. Set the previous and next cycles.

3

Logon - Joel Kristenson [Save] [Save and Close] [Cancel]

The next time a donation comes in online or you hand enter it, it will be categorized with the new default cycle. *Example below.*

When new donations come in they will be categorized with the new default cycle.

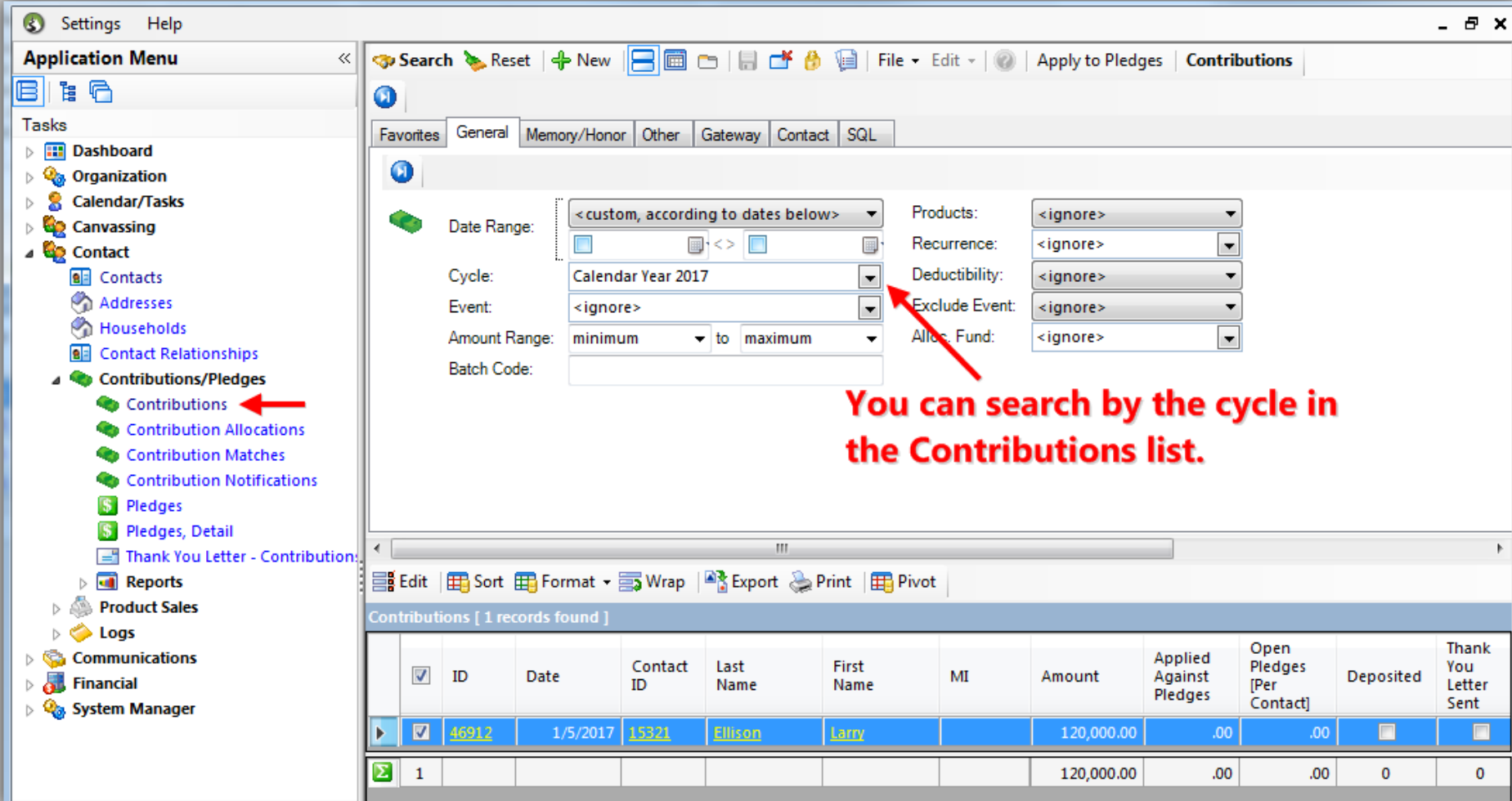


The screenshot shows the TrailBlazer software interface. On the left, the 'New Contact' form is visible, with fields for Title (Mr.), First Name (Larry), Middle Name, Last Name/Suffix (Ellison), Prior Last Name, Nickname (Lars), and Contact Type (Individual). Below this is a table of contributions:

Open	ID	Date	Amount	Refunds
<input checked="" type="checkbox"/>	46911	4/20/2016	80,000.00	.00
<input checked="" type="checkbox"/>	46910	12/12/2015	5,000.00	.00
			85,000.00	.00

On the right, the 'Contribution' form is open for Larry Ellison. The 'Home Address' field is empty. The 'Amount' is 120,000.00, 'Less Refunds' is .00, and 'Net Amount' is 120,000.00. The 'Event' dropdown is set to '2017 New Years Day 5k Fundraiser'. The 'Cycle' dropdown is highlighted with a red box and set to 'Calendar Year 2017'. Other fields include 'Date Received' (1/ 5/2017), 'Type' (Check), 'Recurrence' (Single), 'Check Number' (9786), 'Amount' (120,000.00), 'Tax Deduct Amt' (120,000.00), and 'Memo' (Larry is willing to match all donations in 2017!).

You can build search queries by the **cycle** in the **Contributions** and **Donors (Contacts)** lists.



The screenshot shows the TrailBlazer software interface. On the left is the 'Application Menu' with a tree view. Under 'Contact', 'Contributions/Pledges' is expanded, and 'Contributions' is selected, indicated by a red arrow. The main window shows the 'Contributions' search form with various filters. A red arrow points to the 'Cycle' dropdown menu, which is set to 'Calendar Year 2017'. Below the form, a table displays search results for contributions.

You can search by the cycle in the Contributions list.

	ID	Date	Contact ID	Last Name	First Name	MI	Amount	Applied Against Pledges	Open Pledges [Per Contact]	Deposited	Thank You Letter Sent
<input checked="" type="checkbox"/>	46912	1/5/2017	15321	Ellison	Larry		120,000.00	.00	.00	<input type="checkbox"/>	<input type="checkbox"/>
Σ	1						120,000.00	.00	.00	0	0

The **related resources** below link to a variety of articles and videos similar to this topic.



Trail Blazer™

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

Related Resources

Article: [How to Change your Current, Previous, and Next Cycle or Fiscal Year, and How to Mass Update Donations to a Specific Cycle or Fiscal Year En Masse – Nonprofit Only](#)

Article: [Tax Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage](#)

Article: [How to Create a Year-End Tax Letter Addressed to Individuals or the Entire Household using Merge Fields – Nonprofit Only](#)

Article: [Inserting Contribution Transactions In Donor Merge Letter](#)

Article: [Tracking Grants in Trail Blazer – Requested, Denied, Approved, and How to Build a Pivot Summary Off the Data](#)

Article: [How to Track Soft Credits using Contribution Notifications – ONLY for Nonprofit Customers](#)

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

Video: [Year End Tax Letter](#)

Video: [Getting Started 106a – Entering Contributions \(NON PROFIT ONLY\)](#)

Video: [Getting Started 102 Beginning Queries - Nonprofit](#)

Trail Blazer Live Support

☎ **Phone:** 1-866-909-8700

✉ **Email:** support@trailblz.com

f **Facebook:** <https://www.facebook.com/pages/Trail-Blazer-Software/64872951180>

t **Twitter:** <https://twitter.com/trailblazersoft>

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