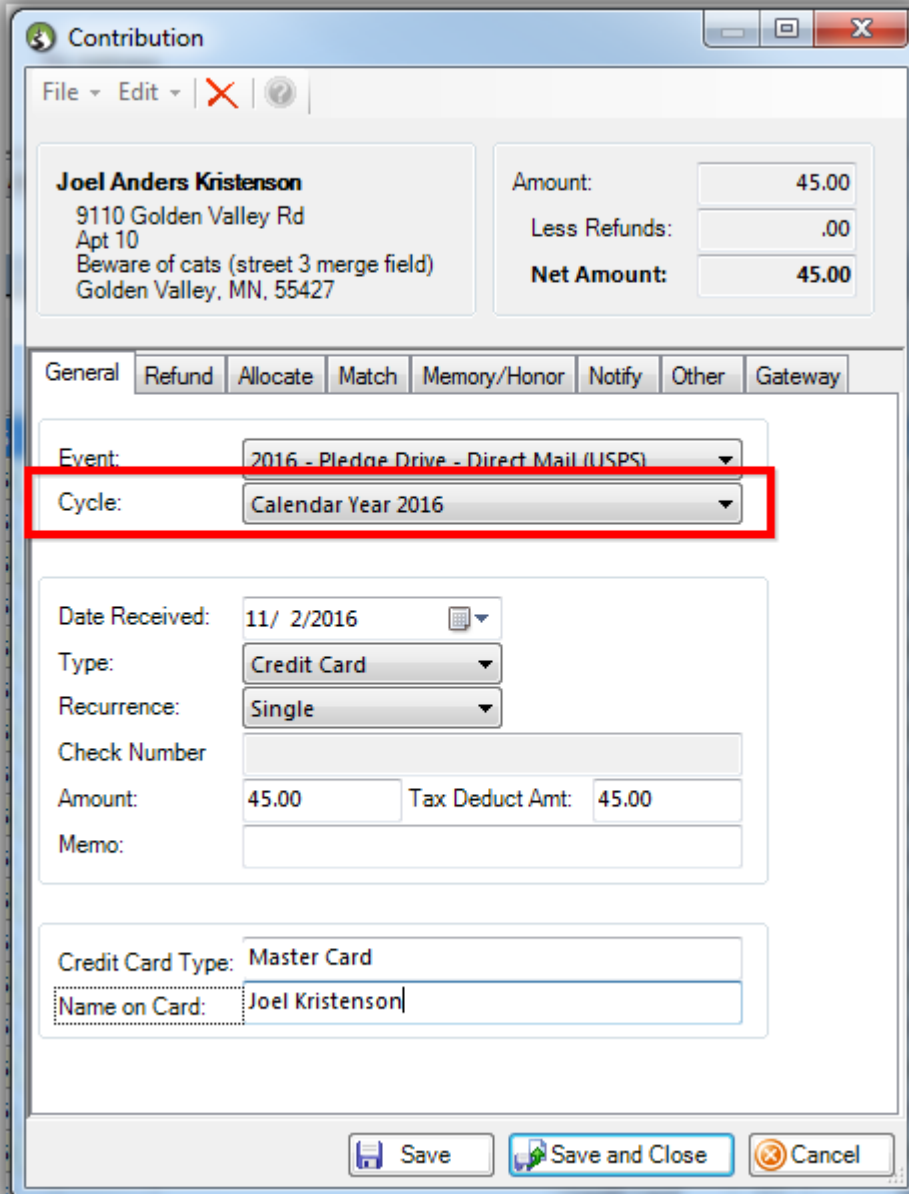**Author:** Kristenson, Joel
Last Updated: 2016-12-30

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:

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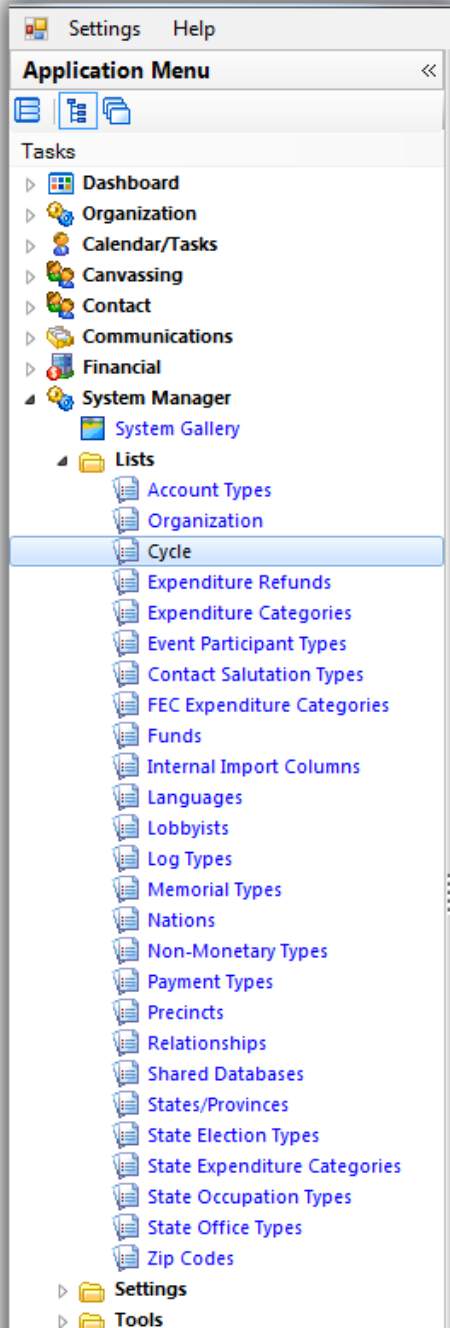
Verify that the **current** and **next** cycles are present, and then move on to the next steps. If they don't exist yet, click **[+ New]** from the **search** tool strip and create new ones. *In my example I created one new cycle for 2018.*

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

Create New Cycle Card

3

Cycle: Calendar Year 2018

General

Cycle Info

Cycle Start Date: ☑ 1/ 1/2018

End Date: ☑ 12/31/2018

Logon = Joel K | Save | Save and Close | Cancel

4

Cycle [28 records found]

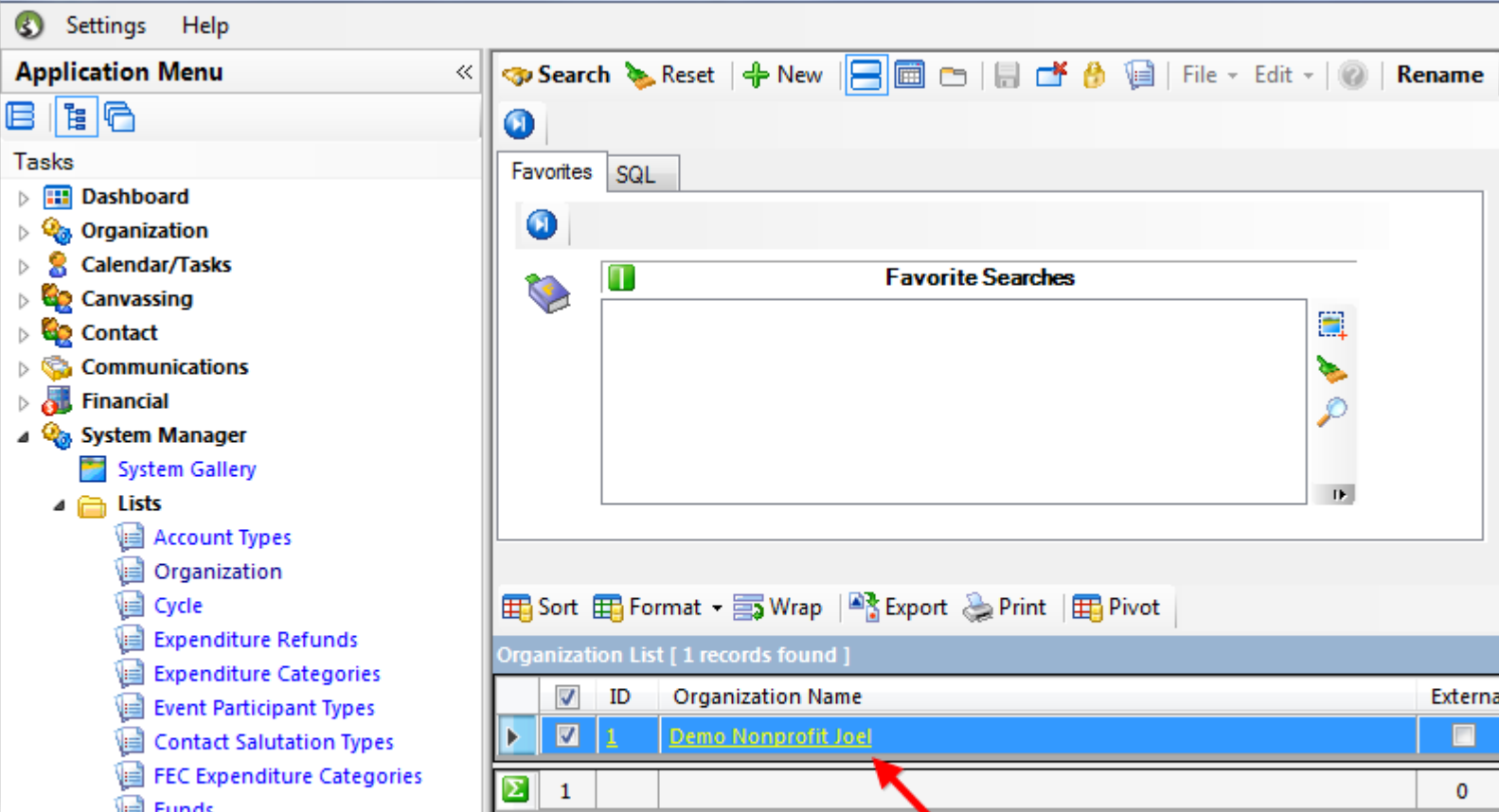|	ID	CycleDescription	Start Date	End Date
☑	6	Calendar Year 1992	1/1/1992	12/31/1992
☑	7	Calendar Year 1993	1/1/1993	12/31/1993
☑	8	Calendar Year 1994	1/1/1994	12/31/1994
☑	9	Calendar Year 1995	1/1/1995	12/31/1995
☑	10	Calendar Year 1996	1/1/1996	12/31/1996
☑	11	Calendar Year 1997	1/1/1997	12/31/1997
☑	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.

6

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](#)).
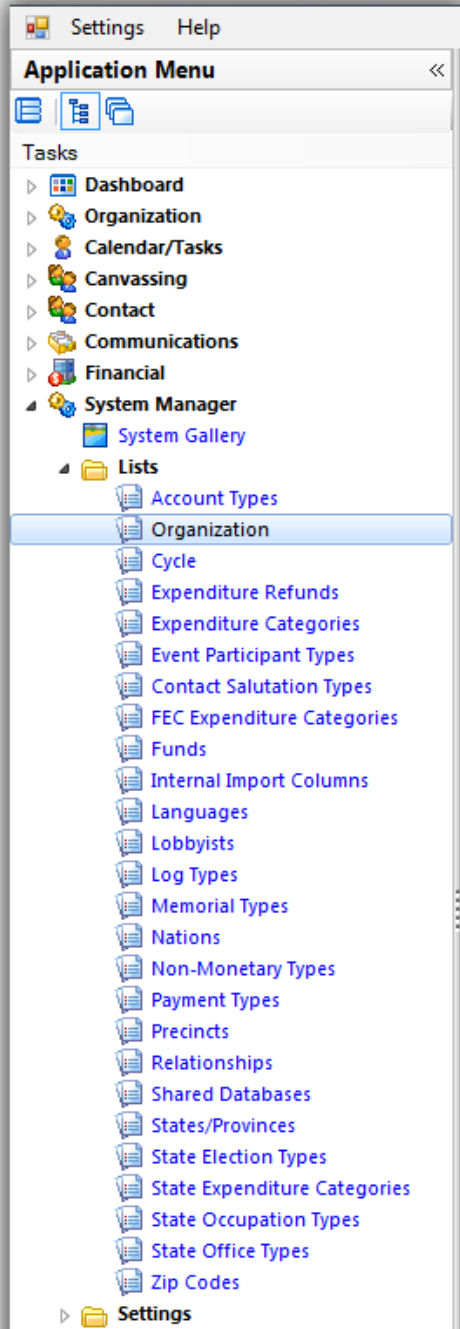
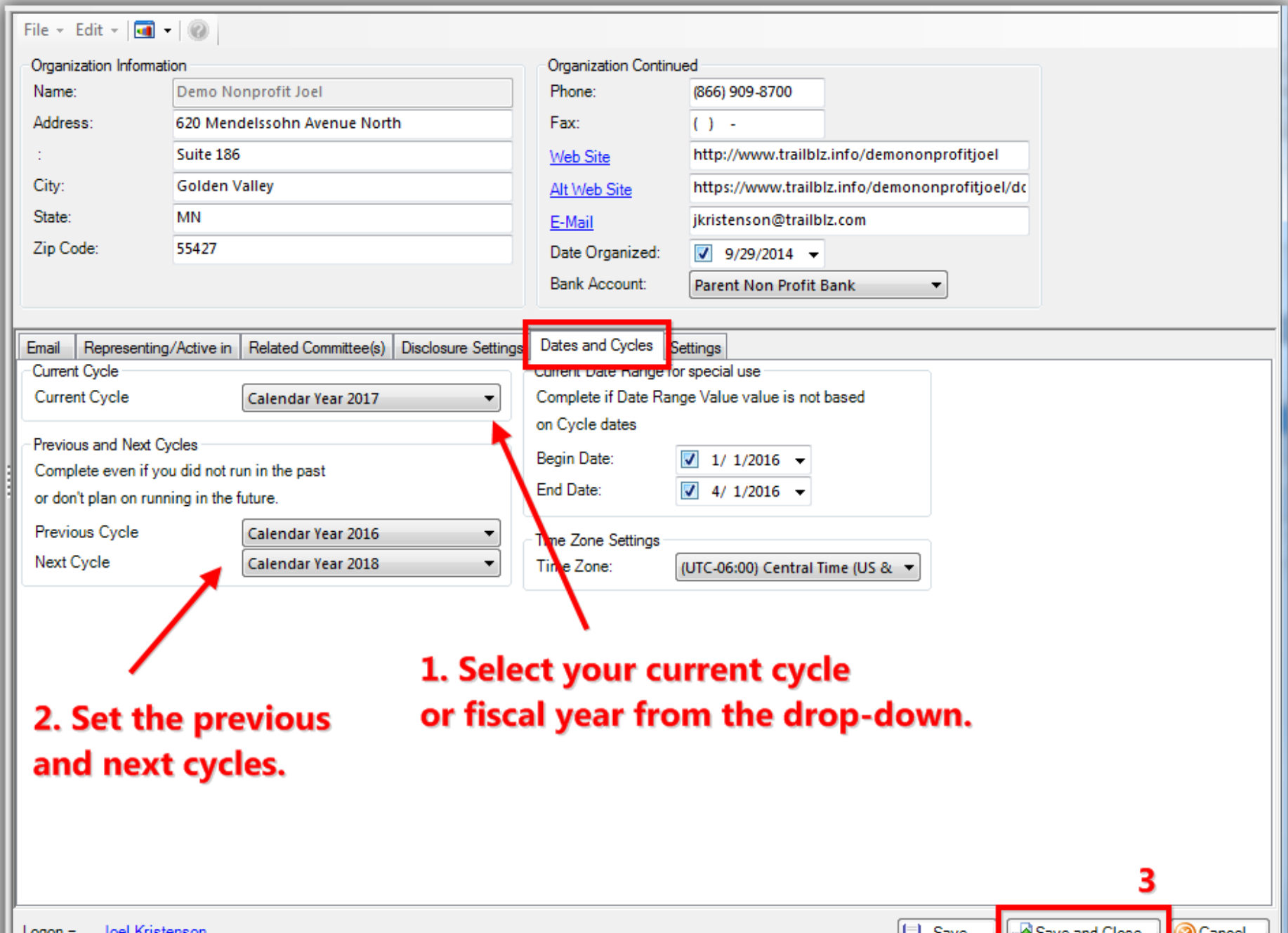Click on the **organization 'name'** from the list to open your org record.

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 ▾ | 📧 ▾ | ❓ |

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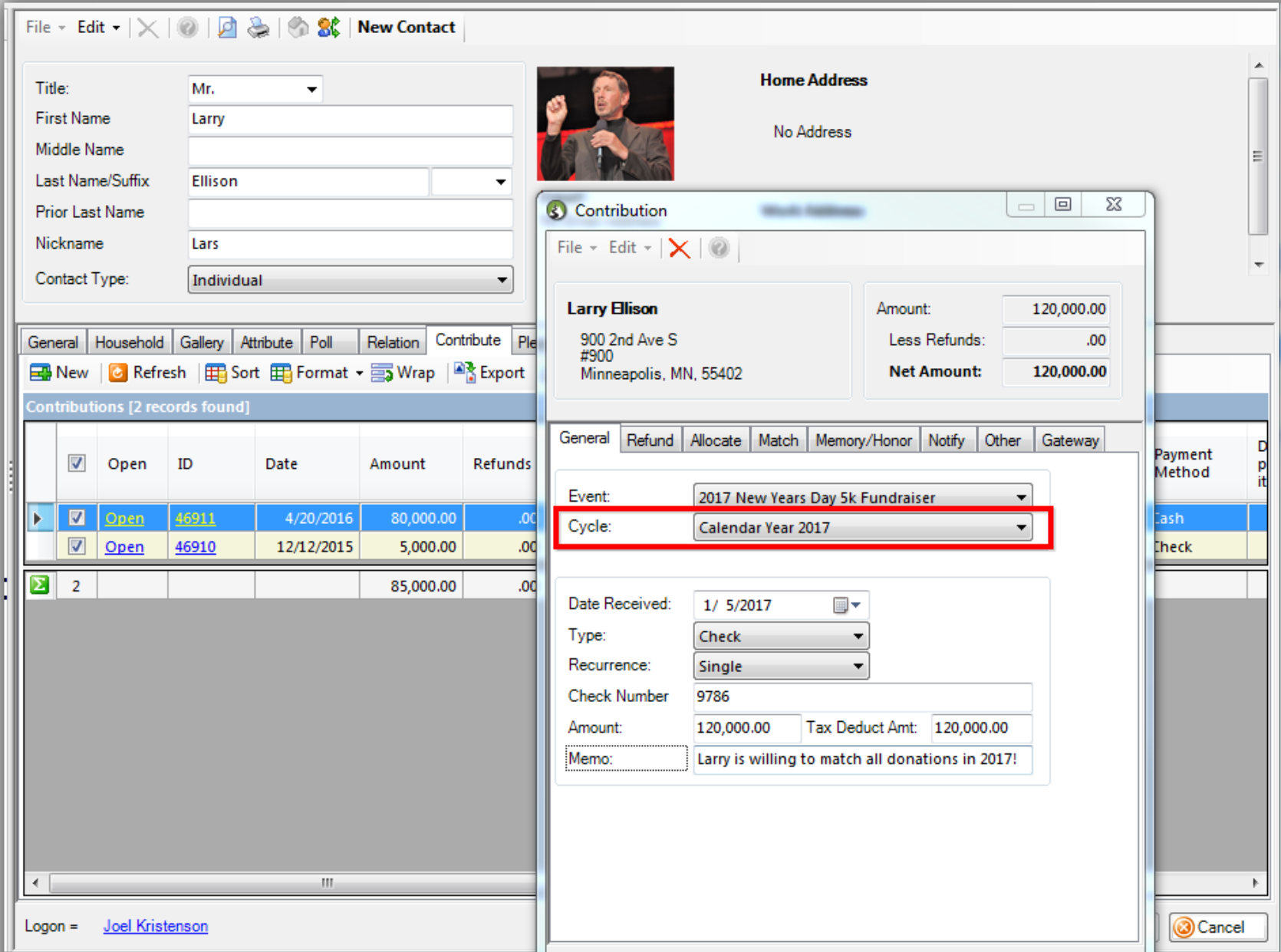
**1. Select your current cycle
or fiscal year from the drop-down.**

**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.*

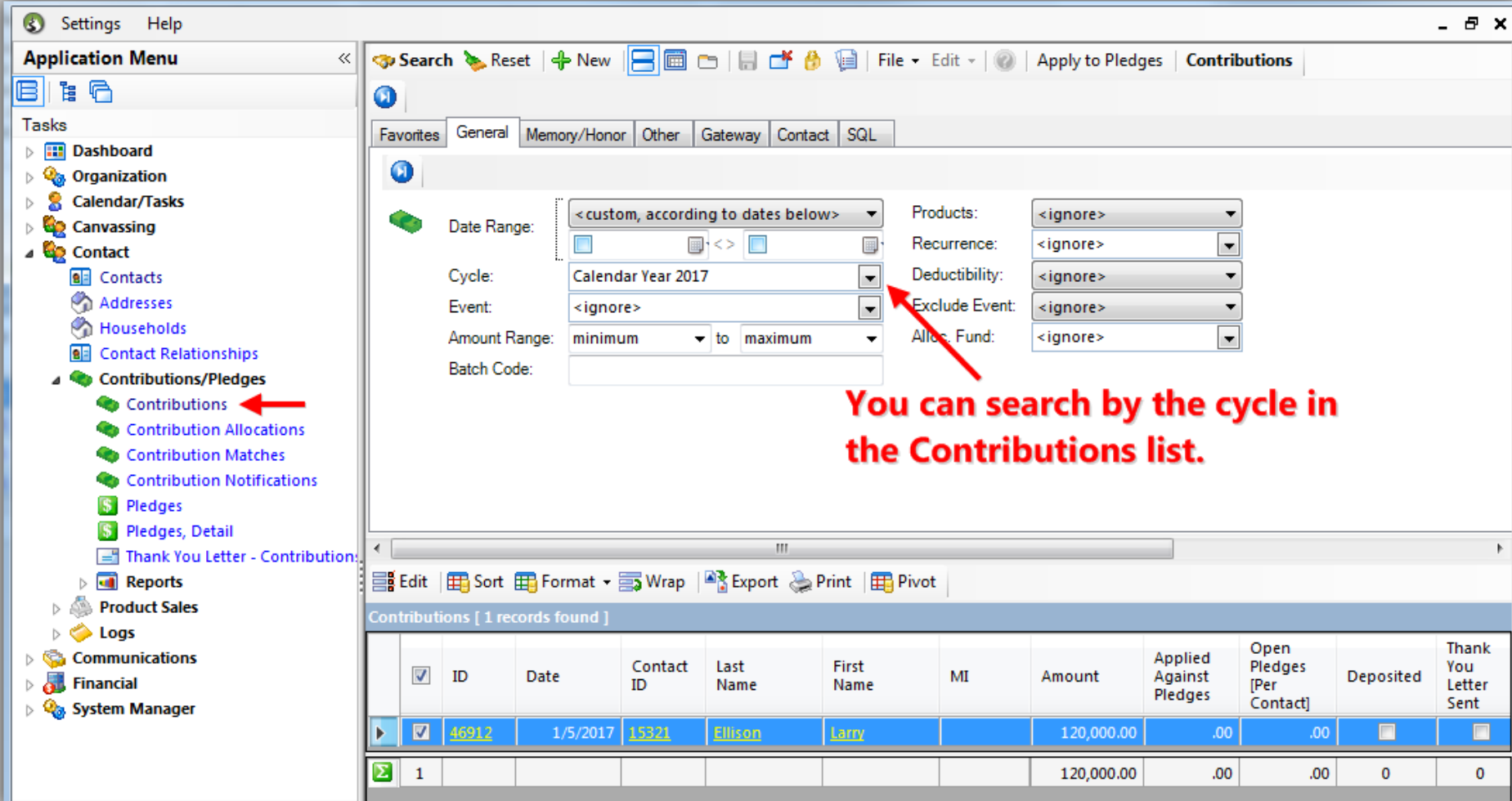**When new donations come in they will be categorized with the new default cycle.**

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

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
- **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.