


Author: Kristenson, Joel
Last Updated: 2017-01-04

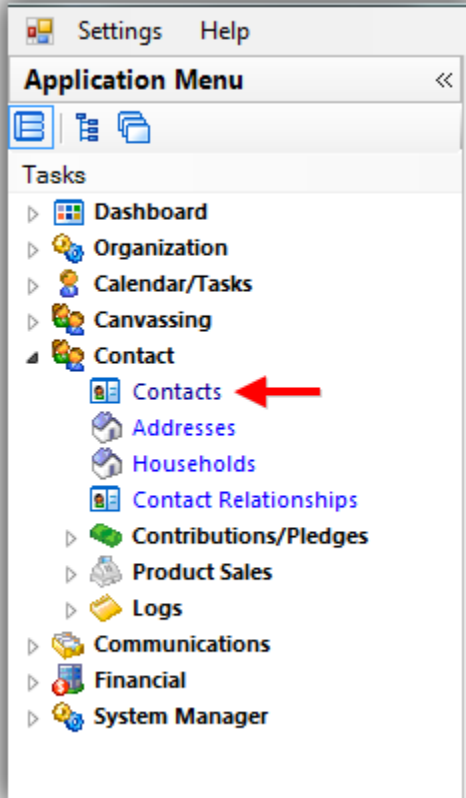
Overview

This article walks through the steps to find **'first time' donors THIS year**. It demonstrates how the **AND/NOT** SQL statements work in **Trail Blazer**, and how to [save/load a search query](#) that you use often. The last part shows how to add this query to your system **dashboard** for quick reporting purposes.

 **Tip:** Learn another popular query called a [LYBUNT](#) (Donors Who Gave Last Year But Unfortunately Not Yet This Year) and learn advanced reporting techniques using [SQL Wildcards](#).

Steps

Open the **Contacts (Voters/Donors)** list under the **Application Menu**.



Building a Search Query for 'First Time Donors' THIS Year - Save and Load it as a Favorite & Add it to your Dashboard

Navigate to the **Contribute** tab, **plug** it in to activate it, enter the **date range** for '**this year**' (*could be different than a calendar year*), and then click **[Search]**. *In my example I searched for all donors who gave in the 2016 calendar year which provided 36 results.*

Building a Search Query for 'First Time Donors' THIS Year - Save and Load it as a Favorite & Add it to your Dashboard

4

1

2

3

results

Search | Reset | New | File | Edit | Include Other | Contacts

Favorites | General | Address | Household | Attribute | Canvass | Relation | **Contribute** | Pledge | Event | Sales | Log | Admin | SQL

Contribute | Marketing Notion

Date Range: **1/ 1/2016** <> 12/31/2016

Cycle: <ignore>

Event: <ignore>

Amount Range: minimum to maximum

Payment Method: <ignore>

Allocation Fund: <ignore>

Contacts [36 records found]

ID	Last Name	First Name	Street	Street 2	City	State	Zip Code	Home Phone	Email
3	Aakhus	Ariel	1709 8th St S	Cpo 3010	Moorhead	MN	56560	(218) 825-9215	Ariel@Aakhusxxx.com
5	Aakhus	Steven	19981 See Gull Rd		Brainerd	MN	56401	(218) 828-9215	Steven@Aakhus.com
40	Adelman	Edward	641 6th St		Albany	MN	56307	(320) 845-7332	
43	Adelmann	Robert	11020 280th St E		Webster	MN	55088	(952) 440-7739	Robert@Adelmann.com
67	Akemann	James	1021 Westwood Dr		Faribault	MN	55021	(507) 334-8226	James@Akemann.com
89	Allanson	Willard	2652 Paradise Trl NW		Isanti	MN	55040	(763) 444-7434	
112	Amundson	Eugene	7218 Robinwood Draw		Woodbury	MN	55125	(651) 738-8321	Eugene@Amundson.com
149	Anderson	Gloria	9045 Larkspur Ln		Eden Prairie	MN	55347	(952) 944-7034	
256	Armbruster	Florence	546 Deer Ridge Ln S		Maplewood	MN	55119	(651) 739-8120	Florence@Armbruster.com
643	Swanekamp	Joan	7255 County Rd 5 NW		Willmar	CT	06500	(320) 231-8126	Joan@Swanekamp.com
868	Dimicco	Gloria	2711 6th St NW		Willmar	CT	06500	(320) 235-8126	Gloria@Dimicco.com
1679	Hall	Nancy	14464 Eldorado St NW		Andover	CT	06500	(763) 433-8725	Nancy@Hall.com
1936	Galentine	Tom	2956 County 120 Rd NE	Apt 68	Stewartville	CT	06500	(507) 533-8426	Tom@Galentine.com
1948	Easler	James	22357 Xylite St NE		East Bethel	MN	55005	(763) 434-8020	James@Easler.com
1949	Easler	Steven	22357 Xylite St NE		East Bethel	MN	55005	(763) 434-8020	Steven@Easler.com
2492	Walton	Melody	22146 Firelight Dr		Park Rapids	CT	06500	(218) 732-8221	
3601	Ibrahim	Yahya	1212 9th St S	Apt 906	Minneapolis	MN	55404	(612) 332-8922	Yahya@Ibrahim.com
4534	Labree	John	5501 Village Dr	Apt 102	Edina	MN	55439	(952) 944-7435	
5132	Wynn	Collette	17453 Glacier Way		Lakeville	CT	06500	(952) 432-8628	Collette@Wynn.com
8186	Taly	Kristin	721 6th St E		Duluth	MN	55805	(218) 428-9618	Kristin@Taly.com
8456	Udvari	Joseph	2717 Delaware St SE		Minneapolis	MN	55414	(651) 324-9410	Joseph@Udvari.com

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To the right of the **plug** button there's a **blue**-and-white **Advanced Function** button. Click on it to **expand** it and click the **orange ampersand [&]** button to add an SQL **AND** statement.

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Expand the 'Advanced Functions Tool Strip' and click the [&] button to add an AND statement.

The screenshot shows the TrailBlazer search interface. At the top, there are navigation buttons like 'Search', 'Reset', 'New', and 'Include Other'. Below that is a menu bar with options like 'Favorites', 'General', 'Address', 'Household', 'Attribute', 'Canvass', 'Relation', 'Contribute', 'Pledge', 'Event', 'Sales', 'Log', 'Admin', and 'SQL'. The 'Contribute' tab is active, showing a 'Marketing Notion' section with various filters. A red arrow labeled '1' points to the '&' button in the 'Advanced Functions Tool Strip'. Another red arrow labeled '2' points to the '&' button in the 'Date Range' dropdown menu. Below the filters is a table of contacts with columns for ID, Last Name, First Name, Street, Street 2, City, State, Zip Code, Home Phone, and Email. The table shows 36 records found.

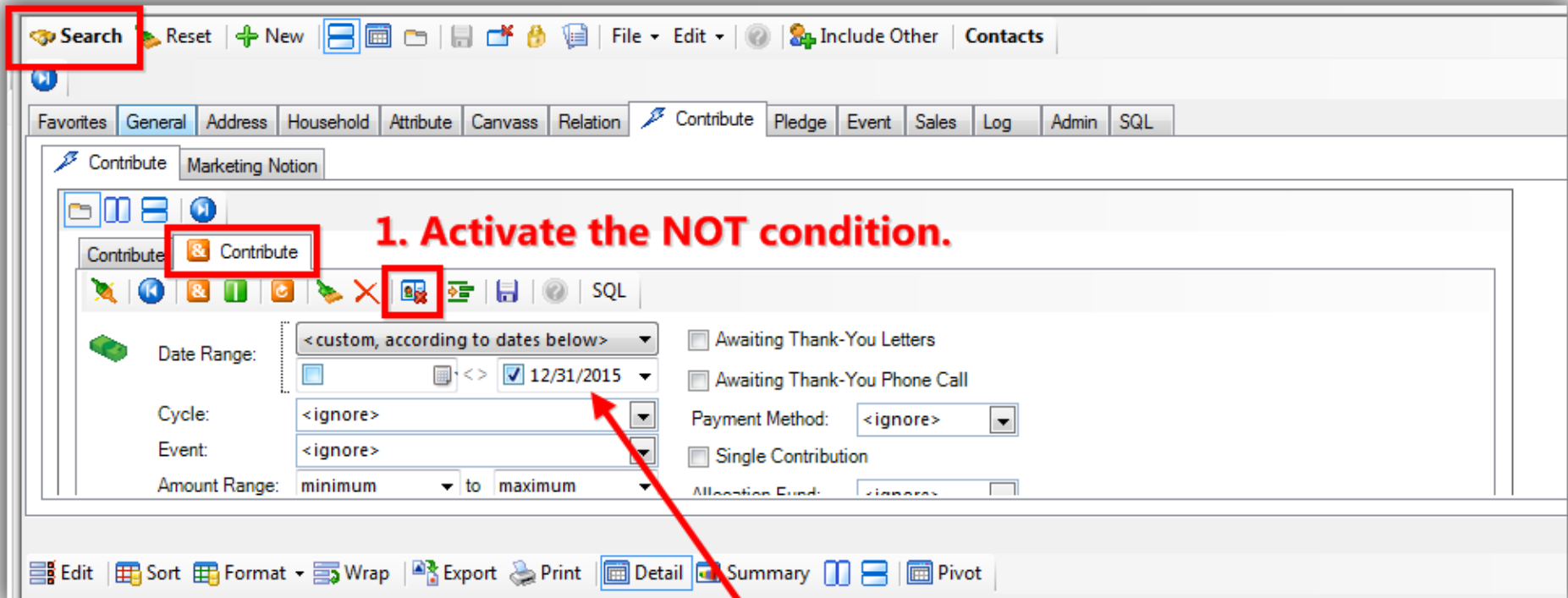
ID	Last Name	First Name	Street	Street 2	City	State	Zip Code	Home Phone	Email
3	Aakhus	Ariel	1709 8th St S	Cpo 3010	Moorhead	MN	56560	(218) 825-9215	Ariel@Aakhusxxx.com
5	Aakhus	Steven	19981 See Gull Rd		Brainerd	MN	56401	(218) 828-9215	Steven@Aakhus.com
40	Adelman	Edward	641 6th St		Albany	MN	56307	(320) 845-7332	
43	Adelmann	Robert	11020 280th St E		Webster	MN	55088	(952) 440-7739	Robert@Adelmann.com
67	Akemann	James	1021 Westwood Dr		Faribault	MN	55021	(507) 334-8226	James@Akemann.com
89	Allanson	Willard	2652 Paradise Trl NW		Isanti	MN	55040	(763) 444-7434	
112	Amundson	Eugene	7218 Robinwood Draw		Woodbury	MN	55125	(651) 738-8321	Eugene@Amundson.com
149	Anderson	Gloria	9045 Larkspur Ln		Eden Prairie	MN	55347	(952) 944-7034	
256	Armbruster	Florence	546 Deer Ridge Ln S		Maplewood	MN	55119	(651) 739-8120	Florence@Armbruster.com
643	Swanekamp	Joan	7255 County Rd 5 NW		Willmar	CT	06500	(320) 231-8126	Joan@Swanekamp.com

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In the new **sub-tab** that opens, click on the little green plus **[+]** button to activate the **NOT** condition (it will turn into a red **[x]**) on the **Advanced Functions** tool strip.

Enter the **end date**, and click **[search]**. *In my example below I set an end date of 12/31/16 telling the system that I want to remove any donor who HAS given **prior or on** that date. I ended up with 13 records.*

3. Click [Search] to refresh the query results.

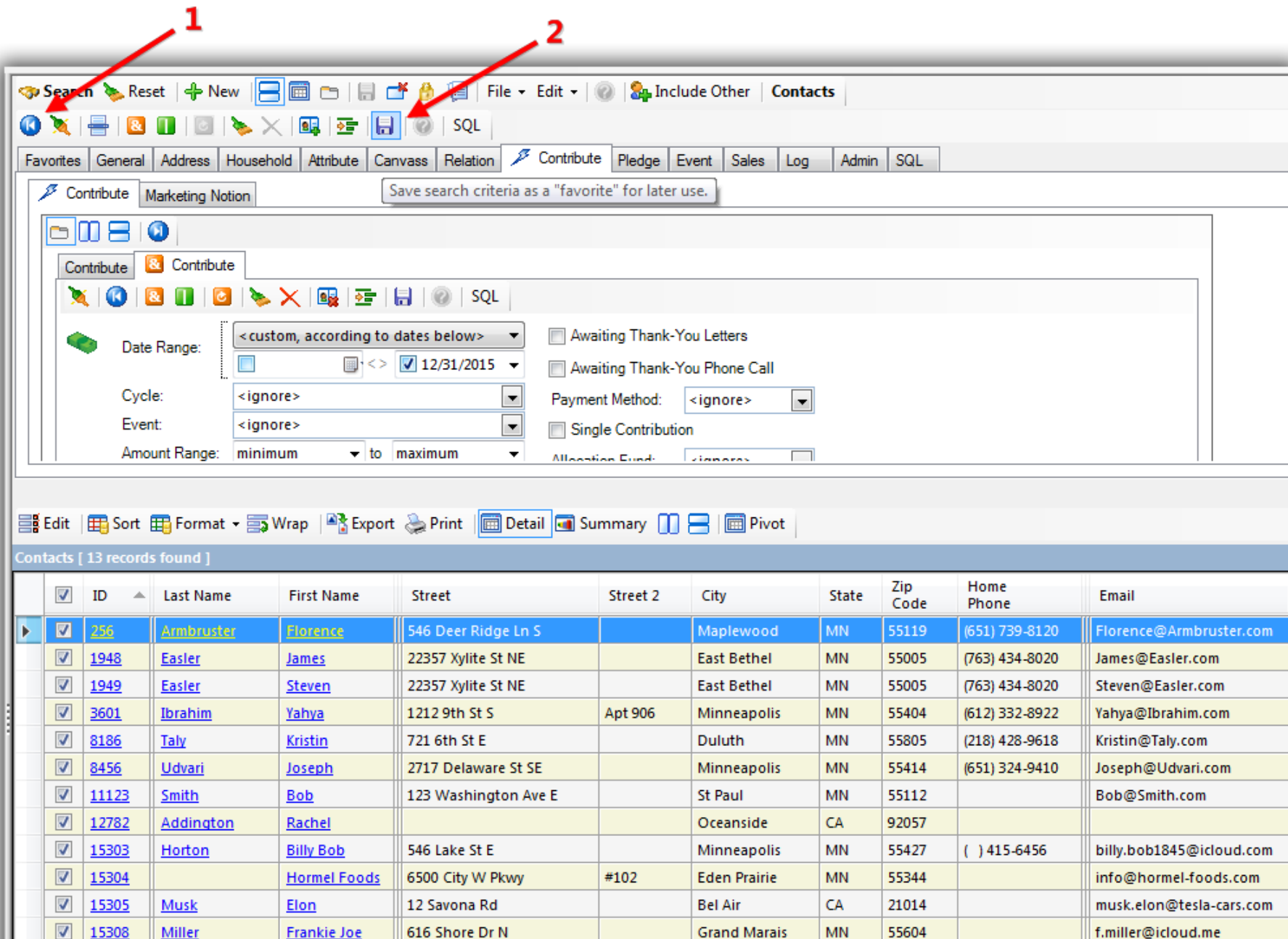


2. Enter the 'end' date which tells Trail Blazer that you only want donors who've given AFTER this date, never on or before it.

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To **save** the search so you don't have to rebuild it each time, expand the top-most **Advanced Functions** tool strip (directly under the **[Search]** button), and click the **blue** floppy disk button.

Building a Search Query for 'First Time Donors' THIS Year - Save and Load it as a Favorite & Add it to your Dashboard

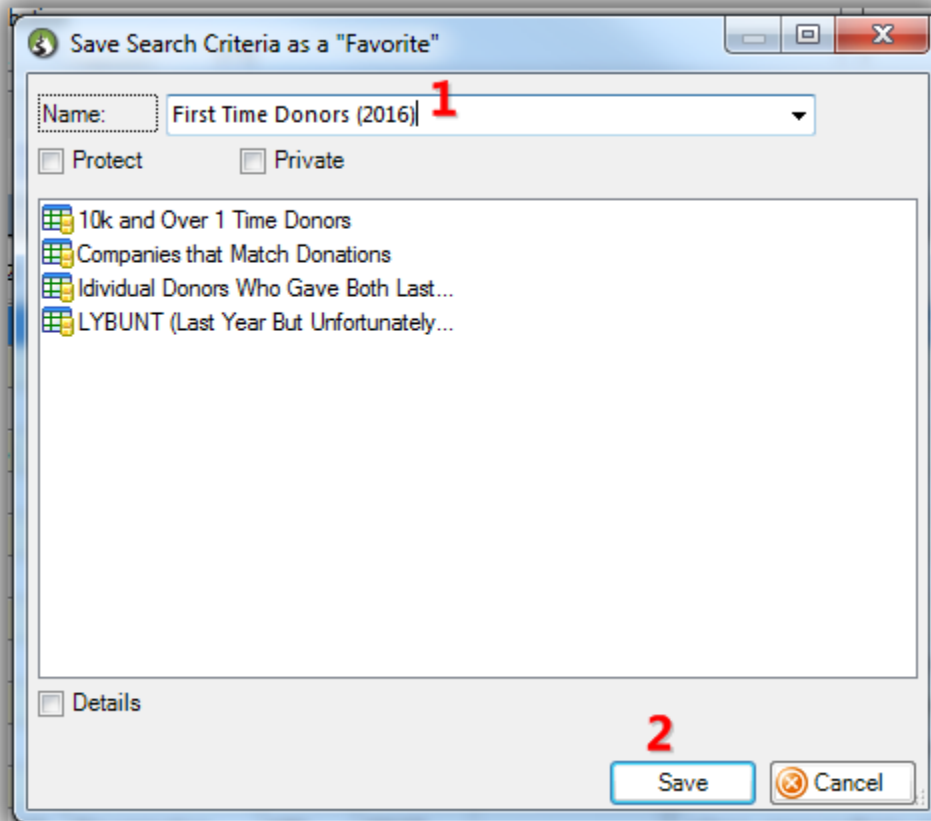


The screenshot shows the TrailBlazer software interface. At the top, there is a toolbar with various icons. Two red arrows are pointing to specific icons: arrow 1 points to the 'Save' icon (a floppy disk), and arrow 2 points to the 'Favorite' icon (a star). Below the toolbar, there are several tabs: Favorites, General, Address, Household, Attribute, Canvass, Relation, Contribute, Pledge, Event, Sales, Log, Admin, and SQL. The 'Contribute' tab is active, and a sub-tab 'Marketing Notion' is selected. A tooltip above the sub-tab says 'Save search criteria as a "favorite" for later use.' Below the sub-tab, there are search criteria fields: Date Range (set to '<custom, according to dates below>' with a calendar icon and '12/31/2015'), Cycle (set to '<ignore>'), Event (set to '<ignore>'), Amount Range (set to 'minimum' to 'maximum'), and checkboxes for 'Awaiting Thank-You Letters', 'Awaiting Thank-You Phone Call', 'Payment Method' (set to '<ignore>'), 'Single Contribution', and 'Allocation Fund' (set to '<ignore>'). Below the search criteria, there is a toolbar with icons for Edit, Sort, Format, Wrap, Export, Print, Detail, Summary, and Pivot. The 'Detail' view is selected. Below the toolbar, there is a header for 'Contacts [13 records found]' and a table with 11 columns: ID, Last Name, First Name, Street, Street 2, City, State, Zip Code, Home Phone, and Email. The table contains 13 rows of contact information.

ID	Last Name	First Name	Street	Street 2	City	State	Zip Code	Home Phone	Email
256	Armbruster	Florence	546 Deer Ridge Ln S		Maplewood	MN	55119	(651) 739-8120	Florence@Armbruster.com
1948	Easler	James	22357 Xylite St NE		East Bethel	MN	55005	(763) 434-8020	James@Easler.com
1949	Easler	Steven	22357 Xylite St NE		East Bethel	MN	55005	(763) 434-8020	Steven@Easler.com
3601	Ibrahim	Yahya	1212 9th St S	Apt 906	Minneapolis	MN	55404	(612) 332-8922	Yahya@Ibrahim.com
8186	Taly	Kristin	721 6th St E		Duluth	MN	55805	(218) 428-9618	Kristin@Taly.com
8456	Udvari	Joseph	2717 Delaware St SE		Minneapolis	MN	55414	(651) 324-9410	Joseph@Udvari.com
11123	Smith	Bob	123 Washington Ave E		St Paul	MN	55112		Bob@Smith.com
12782	Addington	Rachel			Oceanside	CA	92057		
15303	Horton	Billy Bob	546 Lake St E		Minneapolis	MN	55427	() 415-6456	billy.bob1845@icloud.com
15304		Hormel Foods	6500 City W Pkwy	#102	Eden Prairie	MN	55344		info@hormel-foods.com
15305	Musk	Elon	12 Savona Rd		Bel Air	CA	21014		musk.elon@tesla-cars.com
15308	Miller	Frankie Joe	616 Shore Dr N		Grand Marais	MN	55604		f.miller@icloud.me

Building a Search Query for 'First Time Donors' THIS Year - Save and Load it as a Favorite & Add it to your Dashboard

Create a descriptive **name** and click [**Save**].



The saved search will display in the **Favorites** tab for all of your users. As the data changes in the system the query results will change accordingly.

Building a Search Query for 'First Time Donors' THIS Year - Save and Load it as a Favorite & Add it to your Dashboard

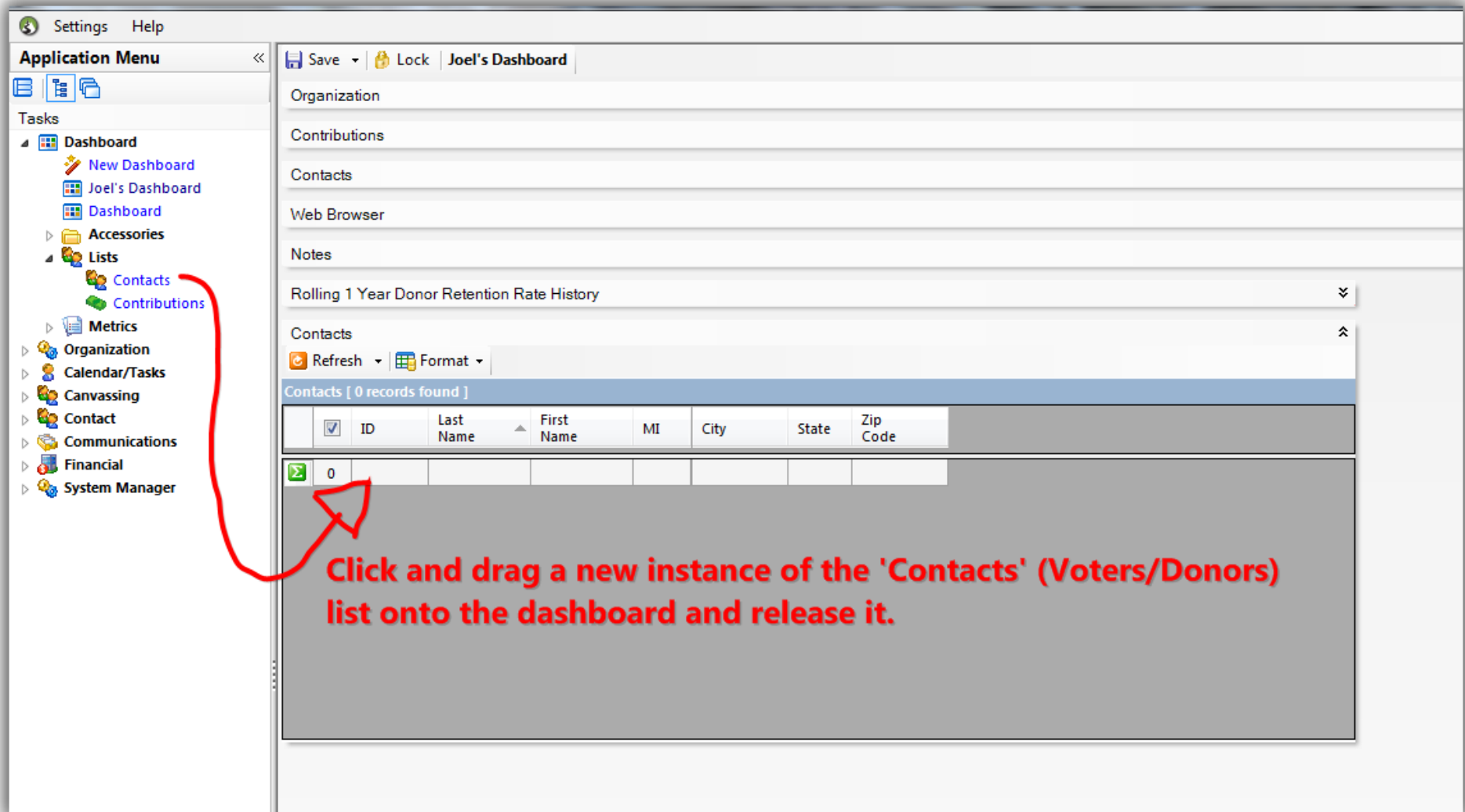
The screenshot shows the TrailBlazer interface with the 'Favorite Searches' dialog box open. The dialog box contains a list of search queries with checkboxes. The 'First Time Donors (2016)' query is selected. The main window displays a table of 13 contact records.

ID	Title	Last Name	First Name	Address Type	Street	Street 2	City	State	Zip Code	Home Phone	Bus Phone
15304			Hornel Foods	3	6500 City W Pkwy	#102	Eden Prairie	MN	55344		(952) 931-1220
12782		Addington	Rachel	1			Oceanside	CA	92057		
256		Armbruster	Florence	1	546 Deer Ridge Ln S		Maplewood	MN	55119	(651) 739-8120	
1948		Easler	James	1	22357 Xylite St NE		East Bethel	MN	55005	(763) 434-8020	
1949		Easler	Steven	1	22357 Xylite St NE		East Bethel	MN	55005	(763) 434-8020	
15303		Horton	Billy Bob	1	546 Lake St E		Minneapolis	MN	55427	() 415-6456	
3601		Ibrahim	Yahya	1	1212 9th St S	Apt 906	Minneapolis	MN	55404	(612) 332-8922	
15308		Miller	Frankie Joe	1	616 Shore Dr N		Grand Marais	MN	55604		
15305		Musk	Elon	1	12 Savona Rd		Bel Air	CA	21014		
15310		Ortega	Amancio	1	60 E Broadway	Space C185	Bloomington	MN	55425		
11123		Smith	Bob	1	123 Washington Ave E		St Paul	MN	55112		(123) 324-1234
8186		Taly	Kristin	1	721 6th St E		Duluth	MN	55805	(218) 428-9618	
8456		Udvvari	Joseph	1	2717 Delaware St SE		Minneapolis	MN	55414	(651) 324-9410	

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To add the report to your **Dashboard** click on your dashboard link in the upper-left under the **Application Menu**. Once it's open, **click-and-drag** an instance of the **Contacts (Donors/Voters)** list onto the dashboard canvass and release it.

Building a Search Query for 'First Time Donors' THIS Year - Save and Load it as a Favorite & Add it to your Dashboard



Settings Help

Application Menu <<

Save Lock Joel's Dashboard

Organization

Contributions

Contacts

Web Browser

Notes

Rolling 1 Year Donor Retention Rate History

Contacts

Refresh Format

Contacts [0 records found]

<input checked="" type="checkbox"/>	ID	Last Name	First Name	MI	City	State	Zip Code
<input checked="" type="checkbox"/>	0						

Click and drag a new instance of the 'Contacts' (Voters/Donors) list onto the dashboard and release it.

Building a Search Query for 'First Time Donors' THIS Year - Save and Load it as a Favorite & Add it to your Dashboard

Click the **drop-down** next to the **[Refresh]** button and select your new **favorite search query** from the list.

Building a Search Query for 'First Time Donors' THIS Year - Save and Load it as a Favorite & Add it to your Dashboard

2

Save | Lock | Joel's Dashboard

Organization

Contributions

Contacts

Web Browser

Notes

Rolling 1 Year Donor Retention Rate History

Contacts

Refresh | Format

- <refresh this list>
- <all>
- 10k and Over 1 Time Donors
- Companies that Match Donations
- ✓ First Time Donors (2016)
- Individual Donors Who Gave Both Last Year This Year
- LYBUNT (Last Year But Unfortunately Not This)

						State	Zip Code
<input checked="" type="checkbox"/>	15303	Horton	Billy Bob		Minneapolis	MN	55427
<input checked="" type="checkbox"/>	3601	Ibrahim	Yahya	Ali	Minneapolis	MN	55404
<input checked="" type="checkbox"/>	15308	Miller	Frankie Joe		Grand Mar...	MN	55604
<input checked="" type="checkbox"/>	15305	Musk	Elon		Bel Air	CA	21014
<input checked="" type="checkbox"/>	15310	Ortega	Amancio		Bloomingt...	MN	55425
<input checked="" type="checkbox"/>	11123	Smith	Bob	Char...	St Paul	MN	55112
<input checked="" type="checkbox"/>	8186	Taly	Kristin	Ann	Duluth	MN	55805
<input checked="" type="checkbox"/>	8456	Udvari	Joseph	David	Minneapolis	MN	55414

1. Select the favorite search from the drop-down.

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You can also modify the [format](#) that goes along with it. *For instance instead of just the donor's name/contact info you might want the last date/amount of their donation as well as their phone number and email.*

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



Trail Blazer™

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

Related Resources

Article: [How to Create a Donor LYBUNT Search Query \(Donors Who Gave Last Year But Unfortunately Not This Year\) and How to Save and Load it as a Search Favorite](#)

Article: [SQL Wildcards](#)

Article: [Save and Load a Search Query as a \(Dynamic\) Search Favorite](#)

Article: [How to Use the NOT Attribute and Query for Records Tagged with It](#)

Article: [What Donors Have Increased Giving Over Last Year](#)

Article: [How to Delete or Rename a Saved Search Favorite \(Query\)](#)

Article: [Advanced Queries – the SQL Tab](#)

Article: [Querying by Email](#)

Article: [How to Use the New Dashboard Features – Adding Graphs and Metrics with Drag-and-Drop](#)

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

Video: [Favorites Deleting Saved Queries](#)

Video: [Getting Started 104 – Queries with wildcards \[retired\]](#)

Video: [Getting Started 105 – Queries with an AND condition](#)

Video: [Favorite – Update and Delete Favorite](#)

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

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

Video: [Donor Retention Dashboard](#)

Trail Blazer Live Support

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

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

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