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# **Overview**

This article will teach you how to add and remove allocation funds into the drop-down list when entering donations into your database.

Example:



# Example fund drop-down menu when entering donations.

| Warren Buffett       Amount:       100,000.00         310 S, 55th St.       .00         Omaha, NE, 68132       Net Amount:       .00         Seneral       Refund       Allocate       Match       Memory/Honor       Notify       Other       Contribution Allocation         New       Sort       Format ~       Wrap       Export       Print       Pivot         Allocation       Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation         Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation         Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation         Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation         Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation         Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation         Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation   | Contribution  |  |  |       |
|--|---|--|--|-------|
| General       Refund       Allocate       Match       Memory/Honor       Notify       Other       Contribution         New       Sort       Format       Image: Contribution Allocation       Image: Contribution Allocation         Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation         Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation         Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation         Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation         Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation         Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation         Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation         Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation       Image: Contribution Allocation         Image: Cont | Warren Buffett<br>310 S. 55th St.<br>Omaha, NE, 68132   | Amount:<br>Less Refunds:<br><b>Net Amount:</b>   | 100,000.00<br>.00<br><b>100,000.00</b> |       |
| iom,   | General       Refund       Allocate       Match       Me         Image: New       Image: Sort       Image: Format       Image: Sort       Image: Sort | mory/Honor Notify<br>p Pri<br>Export Pri<br>uilding Renovation<br>isaster Relief Fund<br>eneral Fund<br>cholarship Fund<br>und - Software & Hard | Other C                                | .om/k |



**Tip:** Read <u>this article</u> to learn how to **add** and **remove** allocation funds onto your <u>online donation form</u>. <u>This article</u> shows how to run a **pivot summary report** to see how much money you have in **each** of your **funds**.

# Steps

Open the Funds list. Requires security clearance.







The funds that have the **Active – Show In Dropdowns** box **checked** are the ones that **will show** in the **drop-down** menu when entering a donation within the database. *In my example there were currently 5.* 

You can either open an existing fund to add or remove it to the donation drop-down menu or create a new fund by clicking the [+ New] button at the top. *In this example I created a new fund.* 



#### Click [+ New] to begin adding a new fund.

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|         |  |   |   |                          |                               |
|         |  | 1   | 2017 Building Renovation  |                          |                               |
| •       | <b>V</b>   | 1 22  | 2017 Building Renovation<br>2017 Disaster Relief Fund   |                          |                               |
| •       | <b>V</b><br><b>V</b>   | 1<br>22<br>21   | 2017 Building Renovation       2017 Disaster Relief Fund       2017 General Fund  |                          |                               |
| >       | <ul> <li></li> &lt;</ul> | 1<br>22<br>21<br>20   | 2017 Building Renovation       2017 Disaster Relief Fund       2017 General Fund       2017 Scholarship Fund  |                          |                               |
| >       | <ul> <li></li> &lt;</ul> | 1<br>22<br>21<br>20<br>12   | 2017/Building Renovation       2017 Disaster Relief Fund       2017 General Fund       2017 Scholarship Fund       Tech Fund - Software & Hardware  |                          |                               |
|         |  | 1<br>22<br>21<br>20<br>12<br>11   | 2017 Building Renovation         2017 Disaster Relief Fund         2017 General Fund         2017 Scholarship Fund         Tech Fund - Software & Hardware         2014 - 2015 Capitol Campaign   |                          |                               |
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|         |  | 1<br>22<br>21<br>20<br>12<br>11<br>9<br>8<br>17<br>13   | 2017/Building Renovation         2017 Disaster Relief Fund         2017 General Fund         2017 Scholarship Fund         Tech Fund - Software & Hardware         2014 - 2015 Capitol Campaign         Grants         Japan - recovery         Jim         Joel  |                          |                               |
|         |  | 1<br>22<br>21<br>20<br>12<br>11<br>9<br>8<br>17<br>13<br>14   | 2017 Building Renovation         2017 Disaster Relief Fund         2017 General Fund         2017 Scholarship Fund         Tech Fund - Software & Hardware         2014 - 2015 Capitol Campaign         Grants         Japan - recovery         Jim         Joel         Kevin  |                          |                               |
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|         |  | 1<br>22<br>21<br>20<br>12<br>11<br>9<br>8<br>8<br>17<br>13<br>14<br>15<br>2                           | 2017 Building Renovation         2017 Disaster Relief Fund         2017 General Fund         2017 Scholarship Fund         Tech Fund - Software & Hardware         2014 - 2015 Capitol Campaign         Grants         Japan - recovery         Jim         Joel         Kevin         Mark         New Roof Fund   |                          |                               |
|         |  | 1<br>22<br>21<br>20<br>12<br>11<br>9<br>8<br>17<br>13<br>14<br>15<br>2<br>18                          | 2017 Building Renovation         2017 Disaster Relief Fund         2017 General Fund         2017 Scholarship Fund         Tech Fund - Software & Hardware         2014 - 2015 Capitol Campaign         Grants         Japan - recovery         Jim         Joel         Kevin         Mark         New Roof Fund   |                          |                               |
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|         |  | 1<br>22<br>21<br>20<br>12<br>11<br>9<br>8<br>8<br>17<br>13<br>14<br>15<br>2<br>2<br>18<br>5<br>5<br>7 | 2017 Building Renovation         2017 Disaster Relief Fund         2017 General Fund         2017 Scholarship Fund         Tech Fund - Software & Hardware         2014 - 2015 Capitol Campaign         Grants         Japan - recovery         Jim         Joel         Kevin         Mark         New Roof Fund         Pat         ScholorShip 100 - African American Nurses         ScholorShip 100 - Female Culinary Arts Fund |                          |                               |
|         |  | 1<br>22<br>21<br>20<br>12<br>11<br>9<br>8<br>8<br>17<br>13<br>14<br>15<br>2<br>18<br>5<br>5<br>7<br>4 | 2017 Building Renovation         2017 Disaster Relief Fund         2017 General Fund         2017 Scholarship Fund         Tech Fund - Software & Hardware         2014 - 2015 Capitol Campaign         Grants         Japan - recovery         Jim         Joel         Kevin         Mark         New Roof Fund         Pat         ScholorShip 100 - African American Nurses         ScholorShip 100 - Nickels Nursing Fund      |                          |                               |
|         |  | 1<br>22<br>21<br>20<br>12<br>11<br>9<br>8<br>17<br>13<br>14<br>15<br>2<br>18<br>5<br>7<br>7<br>4<br>3 | 2017 Building Renovation2017 Disaster Relief Fund2017 General Fund2017 Scholarship FundTech Fund - Software & Hardware2014 - 2015 Capitol CampaignGrantsJapan - recoveryJimJoelKevinMarkNew Roof FundPatScholorShip 100 - African American NursesScholorShip 100 - Nickels Nursing FundScholorShip FundScholorShip Fund   |                          |                               |

Funds that are currently active in the drop-down list will have this box checked.

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\*If the fund already exists you can click on the fund name to make changes, and to remove it from the drop-down list when entering donations.



\*If you're creating a new fund, create a name, check the Active box, and [Save].

# Steps to add a new fund and activate it in the drop-down list when entering donations in your database.



After adding a new fund, click [Search] to refresh the list and the new fund will display. My example is below.



### Click [Search] to refresh the list.

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|        | V        | 22            | 2017 Disaster Relief Fund                   | <b>V</b>             |                |                  |
|        | V        | 21            | 2017 General Fund                           |                      |                |                  |
|        | V        | 23            | 2017 Hope for the Homeless Fund             |                      |                |                  |
|        | V        | 20            | 2017 Scholarship Fund                       | <b>V</b>             |                | <b>T</b> 1       |
|        | V        | 12            | Tech Fund - Software & Hardware             |                      |                | Ine ne           |
|        | V        | 11            | 2014 - 2015 Capitol Campaign                |                      |                | vou ad           |
|        | V        | 9             | Grants                                      |                      |                | Jourau           |
|        | V        | 8             | Japan - recovery                            |                      |                | display          |
|        | V        | 17            | Jim   |                      |                | Fundel           |
|        | V        | 13            | Joel  |                      |                | r unus i         |
|        | V        | 14            | Kevin                                       |                      |                |                  |
|        | V        | 15            | Mark  |                      |                |                  |
|        | <b>V</b> | 2             | New Roof Fund                               |                      |                |                  |
|        | <b>V</b> | 18            | Pat   |                      |                |                  |
|        | V        | 5             | ScholorShip 100 - African American Nurses   |                      |                |                  |
|        | V        | 7             | ScholorShip 100 - Female Culinary Arts Fund |                      |                | .trailblz.com/kb |
|        | V        | 4             | ScholorShip 100 - Nickels Nursing Fund      |                      |                |                  |
|        | V        | 3             | Scholorship Fund                            |                      |                |                  |
|        | V        | 10            | Sponsorship - Bob Meyer                     |                      |                |                  |

The new fund you added will display in the Funds list.

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The next time you enter a donation the new fund you added or the current fund you activated in the drop-down will display. My example is below.



# After activating a new fund for the drop-down menu it will display when you enter donations in your database.

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|                                  |   |  |                              | z.com/kb |



To remove a fund from the drop-down list, simply reverse the previous steps. Open the fund from the Funds list, and uncheck the Active box.

There are multiple lists in the database that allow you to run **reports** on fund data. The screenshots below detail a few of the more common areas you can run these reports e.g. **Contacts (Donors)**, **Contributions**, and **Fund Allocation** Lists.

### **Contributions Report by Fund**

Img 1 of 2 – Navigate to the Contributions List







#### Img 2 of 2 – Search by Fund(s) and Add the Fund Column to the Grid



# You can view all the donation records that are allocated to a particular fund(s) in the Contributions list.



# **Contacts (Donors) Report by Fund**

Img 1 of 2 – Navigate to the Contacts (Donors) List





Img 2 of 2 – Search by Fund(s) Under the Contribute Tab



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# In the Contacts (Donors) list you can search for the donors who've given to a particular fund(s).

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|      | Þ          | tacts [  | ID       15304       89       1679       15308       15305                     | Allanson<br>Hall<br>Musk  | First Name<br>Hornel Foods<br>Willard<br>Nancy<br>Frankie Joe<br>Elon                      | Street<br>6500 City Pkwy W<br>2652 Paradise Trl NW<br>14464 Eldorado St NW<br>616 Shore Dr N<br>12 Savona Rd                          | Street 2 Apt 102   | City<br>Eden Prairie<br>Isanti<br>Andover<br>Grand Marais<br>Bel Air  | State<br>MN<br>MN<br>CT<br>MN<br>CA             | Zip<br>Code<br>55344<br>55040<br>06500<br>55604<br>21014                   | Home Phone<br>(763) 444-7434<br>(763) 433-8725   | Email<br>info@hormel-foods.com<br>Nancy@Hall.com<br>f.miller@icloud.me<br>musk.elon@tesla-cars.com  | Employer/Company<br>Name<br>Name<br>NA<br>Setf-Employed                          |
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## **Contribution Allocations Report by Fund**

Img 1 of 2 – Navigate to the Contribution Allocations List







Img 2 of 2 – Search by Fund(s) to View Transactional Donation by Fund Data



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Take a look at the related resources below to read other articles and videos related to this topic.



YouTube Channel

- Knowledge Base Articles

- 3rd Party Resources



# **Related Resources**

Article: Fund Allocation and Summary Report Article: How to Add and Remove Allocation Funds to your Online Donation Form, and to Drop-Down Menus in your Database Article: How to Put your Trail Blazer Donation Form on your Facebook Page Article: Creating and Saving Default Format for Reporting with the Grid Article: Configure Website (iFrames) Article: Linking your Website to your Database with Configurable iFrame Forms Article: Custom Donation Amounts for Non-Primary Donation Pages – List of All Configurable Donation Page URL Options Article: How to Create a Custom Redirect Thank-You Page for your Donation Form(s) that Automatically Populates the Donor's First Name and the Donation Amount they Gave – Advanced Feature Article: How to Configure Recurring Donation Options for your Trail Blazer Donation Form (must be using either Vanco Services or Authorize.Net as your Merchant Gateway) Article: How to Enable ACH (E-Check) Payments with the Vanco Merchant Gateway on Trail Blazer's Donation Form Article: Memorial and Honorarium Gifts – Add the Option to your Online Donation Form, and How to Run Searches and Build Reports on these Types of Gifts in the Database Video: Iframes Video: Reporting 104 – Joined Tables Video: Reporting 102 – Quick Reports and Export Video: Getting Started 106a – Entering Contributions (NON PROFIT ONLY) Video: Reporting 105 – Pivots – summary reporting



# **Trail Blazer Live Support**

- **(C)** Phone: 1-866-909-8700
- Email: <a href="mailto:support@trailblz.com">support@trailblz.com</a>
- Facebook: <a href="https://www.facebook.com/pages/Trail-Blazer-Software/64872951180">https://www.facebook.com/pages/Trail-Blazer-Software/64872951180</a>
- **Twitter:** <u>https://twitter.com/trailblazersoft</u>

\* 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.

\* This service *is* included in your contract.