

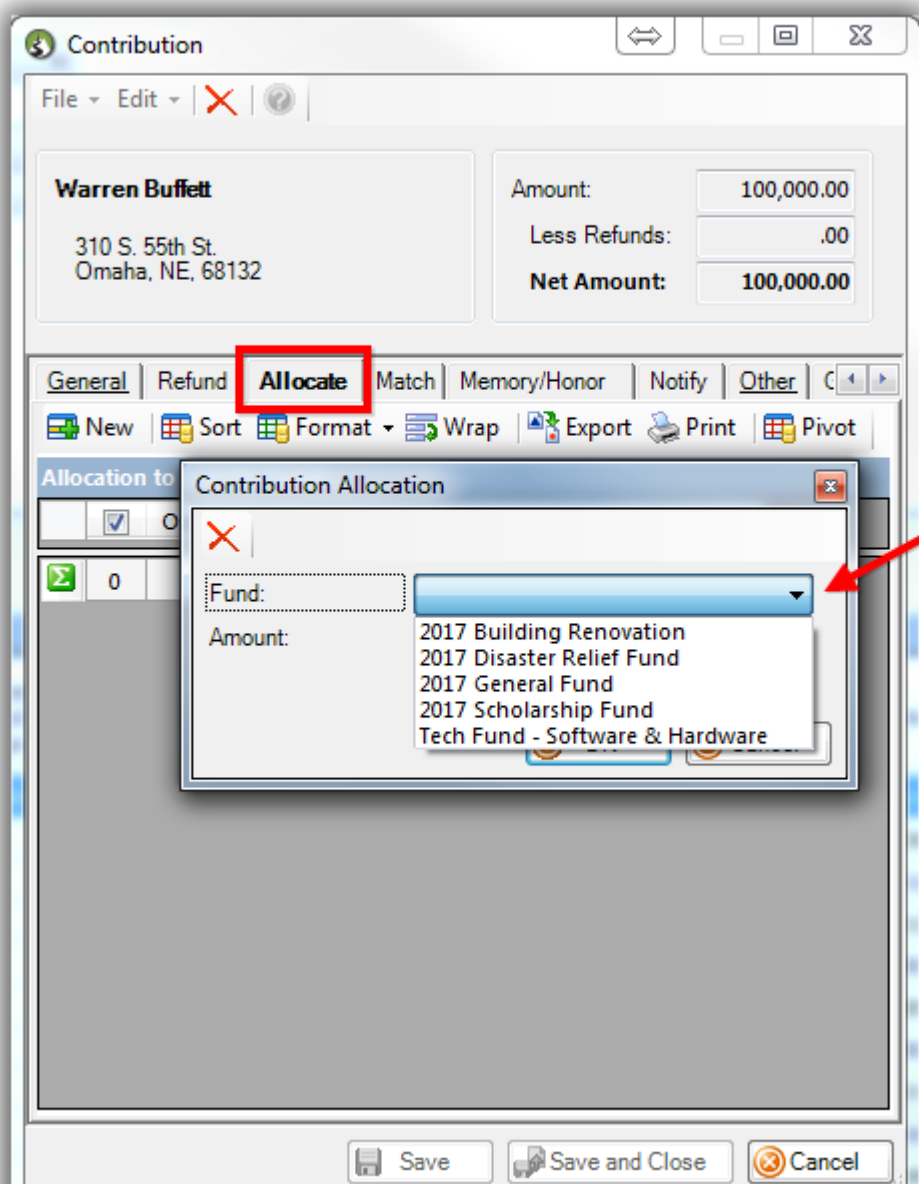
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Overview

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

Example:

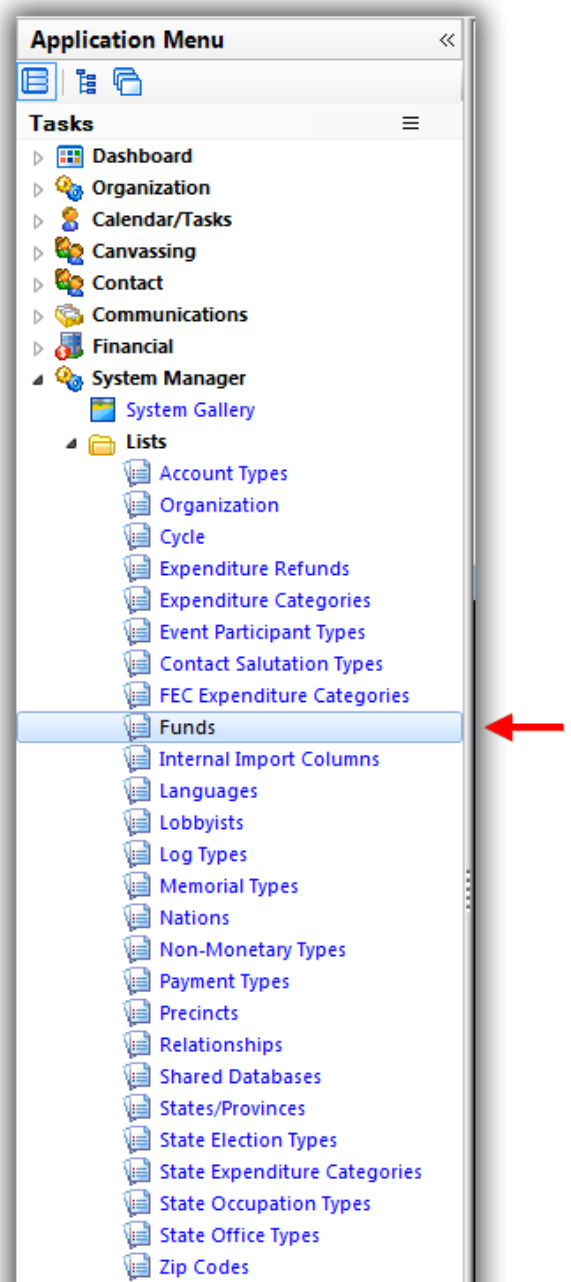
Example fund drop-down menu when entering donations.



 **Tip:** Read [this article](#) to learn how to **add** and **remove** allocation funds onto your [online donation form](#). [This article](#) shows how to run a **pivot summary report** to see how much money you have in **each** of your **funds**.

Steps

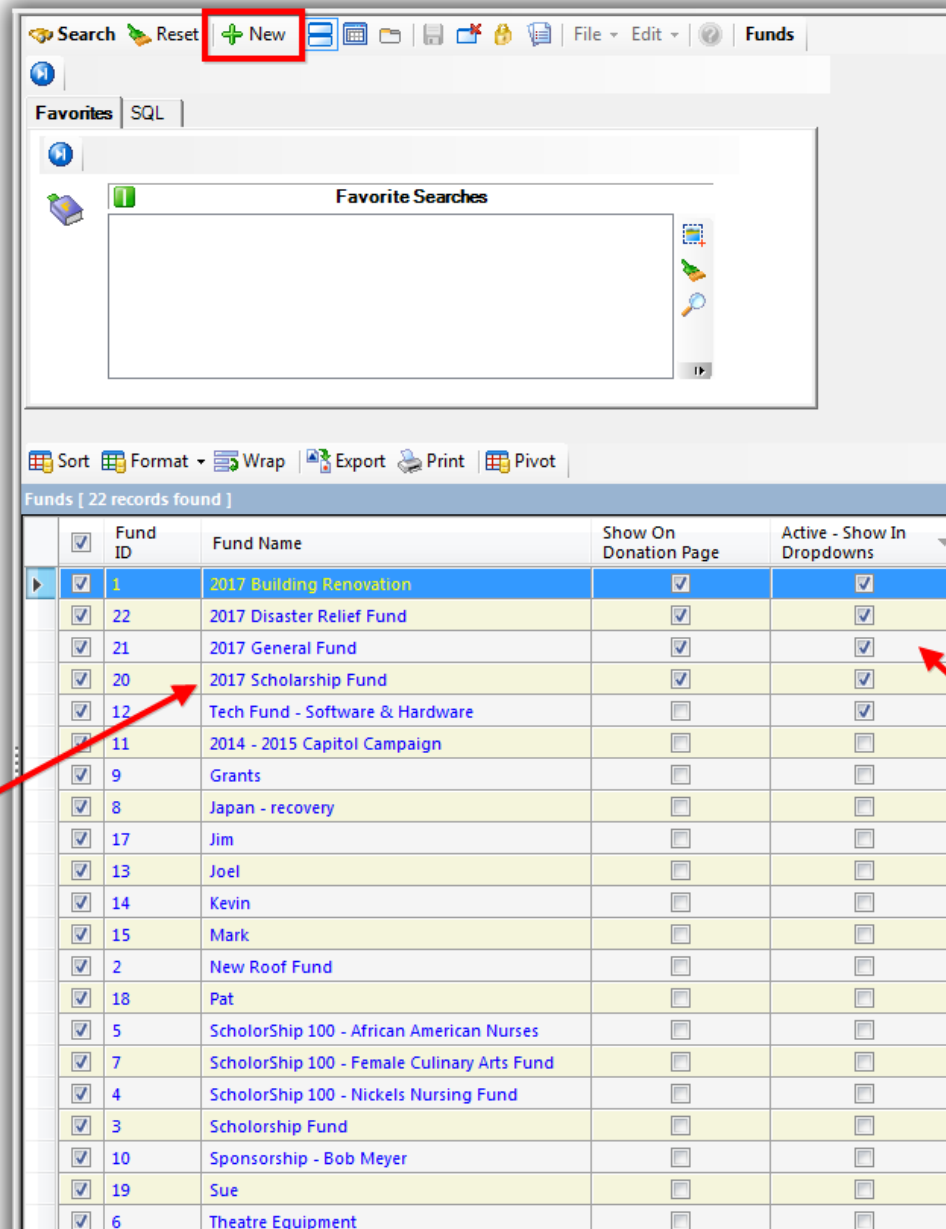
Open the **Funds** list. *Requires [security clearance](#).*



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.



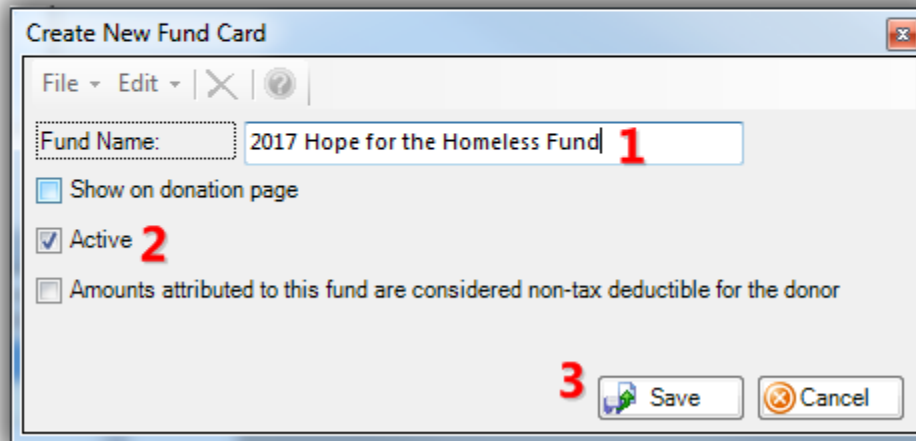
	<input checked="" type="checkbox"/>	Fund ID	Fund Name	Show On Donation Page	Active - Show In Dropdowns
	<input checked="" type="checkbox"/>	1	2017 Building Renovation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>	22	2017 Disaster Relief Fund	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>	21	2017 General Fund	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>	20	2017 Scholarship Fund	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>	12	Tech Fund - Software & Hardware	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>	11	2014 - 2015 Capitol Campaign	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	9	Grants	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	8	Japan - recovery	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	17	Jim	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	13	Joel	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	14	Kevin	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	15	Mark	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	2	New Roof Fund	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	18	Pat	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	5	ScholarShip 100 - African American Nurses	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	7	ScholarShip 100 - Female Culinary Arts Fund	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	4	ScholarShip 100 - Nickels Nursing Fund	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	3	Scholarship Fund	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	10	Sponsorship - Bob Meyer	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	19	Sue	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	6	Theatre Equipment	<input type="checkbox"/>	<input type="checkbox"/>

***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.**

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

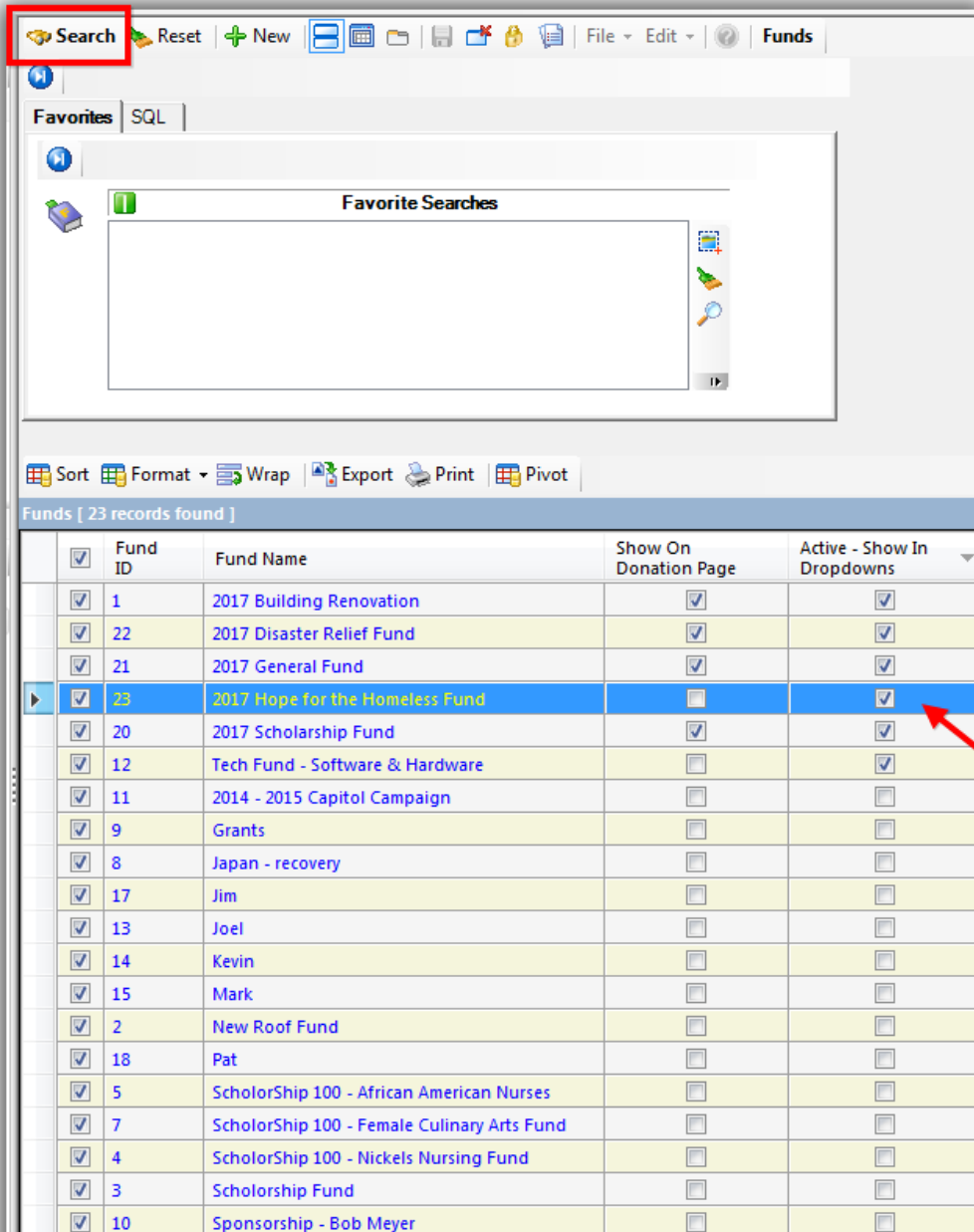
*If you're creating a new fund, create a name, check the **Active** box, and **[Save]**.

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.

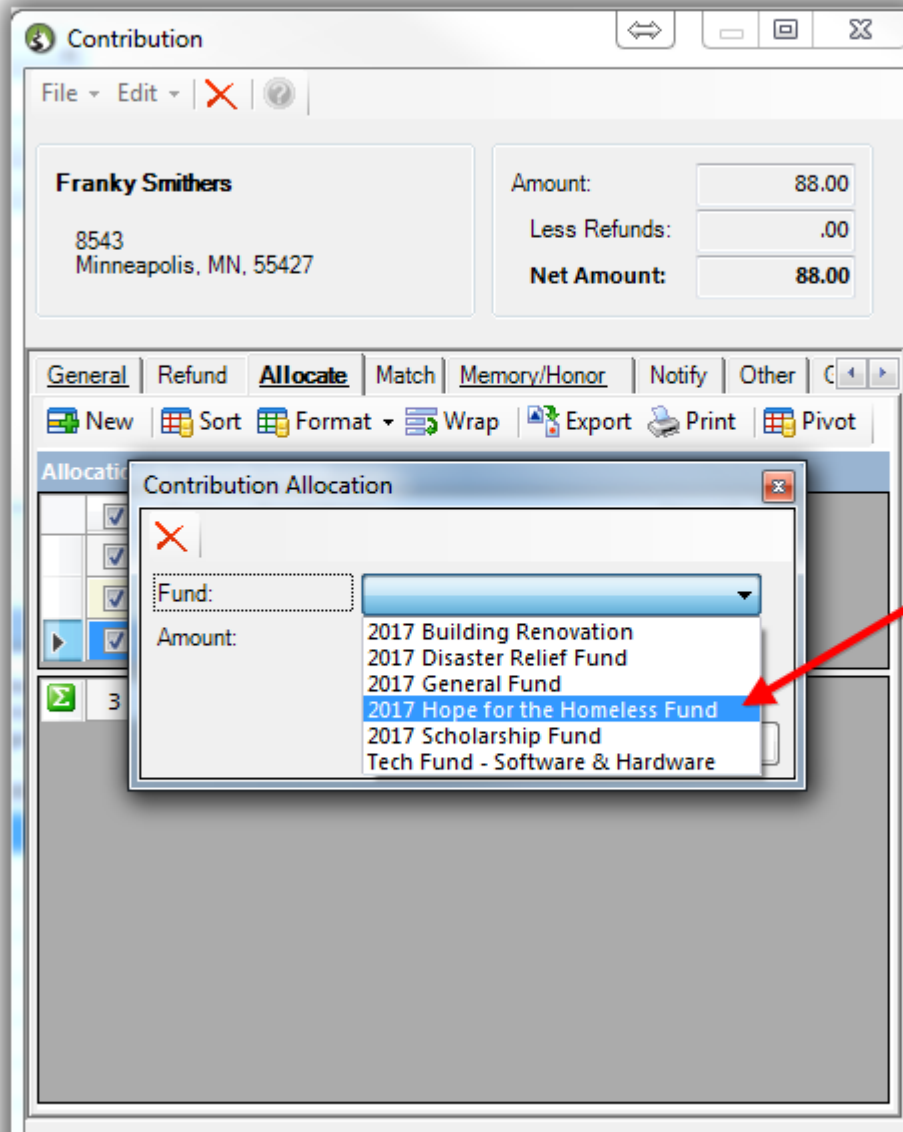


<input checked="" type="checkbox"/>	Fund ID	Fund Name	Show On Donation Page	Active - Show In Dropdowns
<input checked="" type="checkbox"/>	1	2017 Building Renovation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	22	2017 Disaster Relief Fund	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	21	2017 General Fund	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	23	2017 Hope for the Homeless Fund	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	20	2017 Scholarship Fund	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	12	Tech Fund - Software & Hardware	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	11	2014 - 2015 Capitol Campaign	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	9	Grants	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	8	Japan - recovery	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	17	Jim	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	13	Joel	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	14	Kevin	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	15	Mark	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	2	New Roof Fund	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	18	Pat	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	5	ScholarShip 100 - African American Nurses	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	7	ScholarShip 100 - Female Culinary Arts Fund	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	4	ScholarShip 100 - Nickels Nursing Fund	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	3	Scholarship Fund	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	10	Sponsorship - Bob Meyer	<input type="checkbox"/>	<input type="checkbox"/>

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

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.

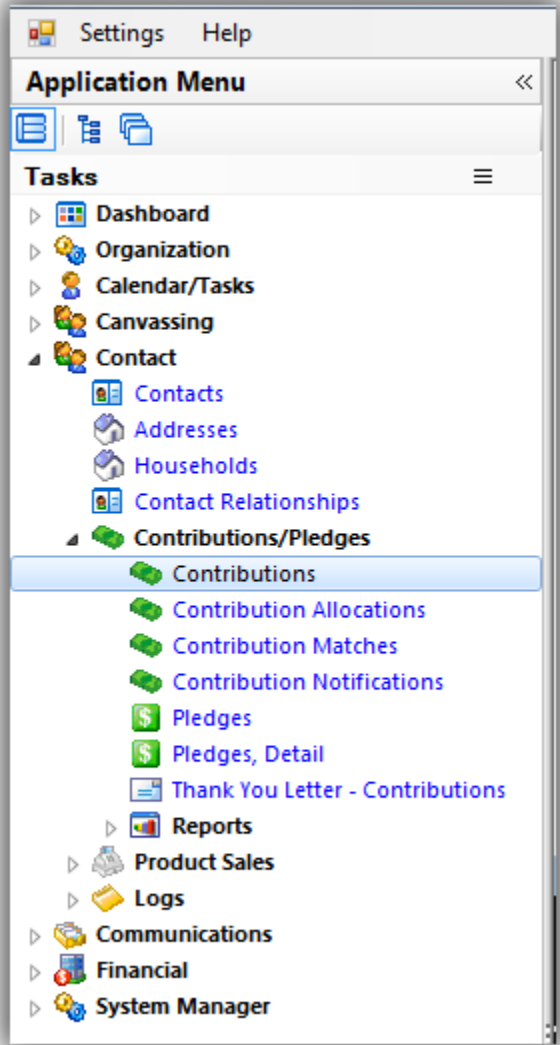


To **remove** a fund from the drop-down list, simply **reverse** the previous steps. **Open** the fund from the **Funds list**, and uncheck the **Active** box.

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.

2

1. You can search by the allocation fund(s) under this menu.

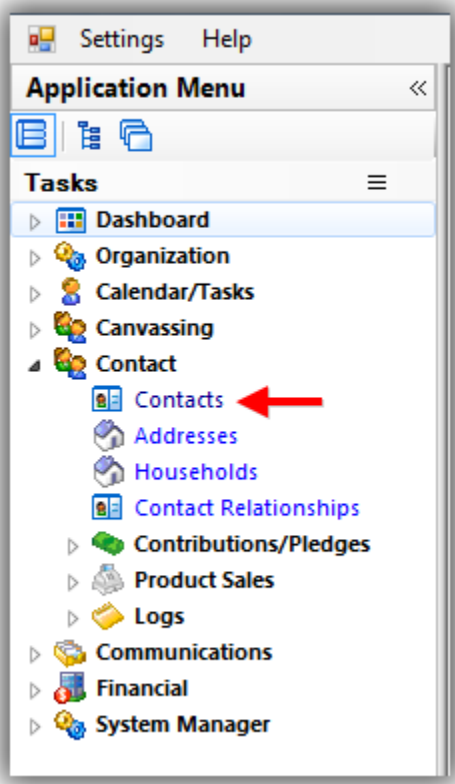
You can add the allocation fund column into the grid via formatting.

results

	ID	Last Name	First Name	Date	Amount	Thank You Letter Sent	Check #	Street	Street 2	City	State	Zip Code	Cycle	Payment Method	Recurrence Type	Allocation Fund
<input checked="" type="checkbox"/>	46904		Home! Foods	12/20/2017	50.00	<input checked="" type="checkbox"/>	4545	6500 City Pkwy W	Apt 102	Eden Prairie	MN	55344	Calendar Year 2017	Check	Single	2017 Hope for the Homeless Fund
<input checked="" type="checkbox"/>	46909	Ortega	Amancio	12/20/2017	605.00	<input type="checkbox"/>		60 E Broadway	Space C185	Bloomington	MN	55425	Calendar Year 2017	Credit Card	Single	2017 Hope for the Homeless Fund
<input checked="" type="checkbox"/>	46907	Miller	Frankie Joe	12/9/2017	2,630.00	<input checked="" type="checkbox"/>		616 Shore Dr N		Grand Marais	MN	55604	Calendar Year 2017	Credit Card	Single	2017 Hope for the Homeless Fund
<input checked="" type="checkbox"/>	46906	Hall	Nancy	12/9/2017	195.00	<input checked="" type="checkbox"/>		14464 Eldorado St NW		Andover	CT	06500	Calendar Year 2017	Check	Single	2017 Hope for the Homeless Fund
<input checked="" type="checkbox"/>	46905	Musk	Elon	12/8/2017	2,630.00	<input checked="" type="checkbox"/>		12 Savona Rd		Bel Air	CA	21014	Calendar Year 2017	Credit Card	Single	2017 Hope for the Homeless Fund
<input checked="" type="checkbox"/>	46915	Smithers	Franky	3/13/2017	88.00	<input type="checkbox"/>		8543		Minneapolis	MN	55427	Calendar Year 2017	Credit Card	Single	2017 Hope for the Homeless Fund
<input checked="" type="checkbox"/>	46902	Allanson	Willard	11/18/2017	5,000.00	<input checked="" type="checkbox"/>		2652 Paradise Trl NW		Isanti	MN	55040	Calendar Year 2017	Credit Card	Single	2017 Hope for the Homeless Fund
7					11,198.00	5										

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

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

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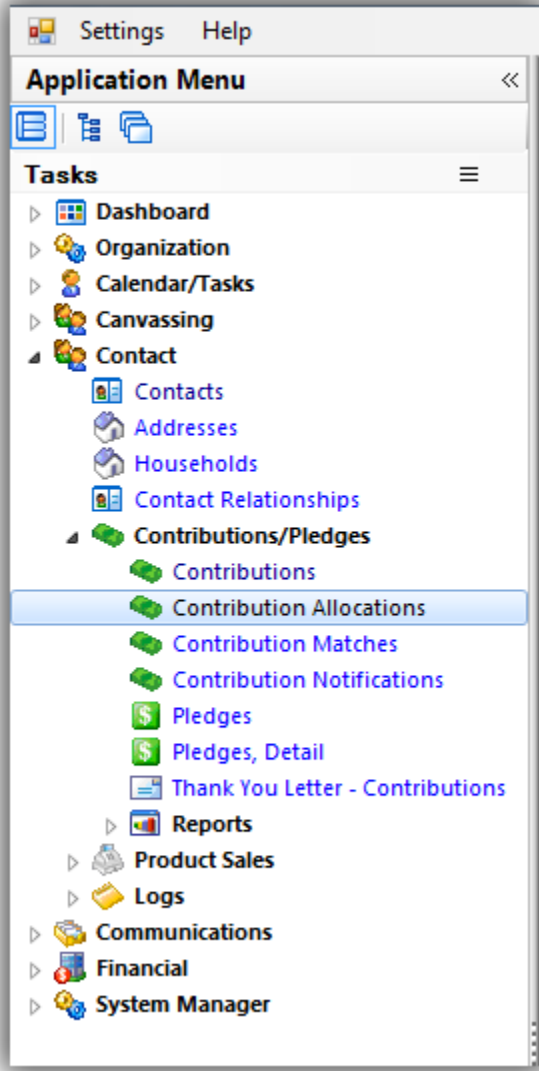
results

Contacts [7 records found]

ID	Last Name	First Name	Street	Street 2	City	State	Zip Code	Home Phone	Email	Employer/Company Name
15304		Hormel Foods	6500 City Pkwy W	Apt 102	Eden Prairie	MN	55344		info@hormel-foods.com	
89	Allanson	Willard	2652 Paradise Trl NW		Isanti	MN	55040	(763) 444-7434		
1679	Hall	Nancy	14464 Eldorado St NW		Andover	CT	06500	(763) 433-8725	Nancy@Hall.com	
15308	Miller	Frankie Joe	616 Shore Dr N		Grand Marais	MN	55604		f.miller@icloud.me	NA
15305	Musk	Elon	12 Savona Rd		Bel Air	CA	21014		musk.elon@tesla-cars.com	Self-Employed
15310	Ortega	Amancio	60 E Broadway	Space C185	Bloomington	MN	55425		ortega-amancio@icloud.me	Self
15327	Smithers	Franky	8543		Minneapolis	MN	55427	(123) 56789564	franky-the-man2017@me.com	Apple

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

How to Add and Remove Allocation Funds to the Donation Form Drop-Down Inside the Trail Blazer Database

Search Reset New **Contribution Allocation List**

Favorites | General | **Contribution** | SQL

Favorites | **General** | Memory/Honor | Other | Gateway | **Contact** | SQL

Date Range: <custom, according to dates below> Products: <ignore>
 1/ 1/2016 <> Recurrence: <ignore>
 Cycle: <ignore> Deductibility: <ignore>
 Event: <ignore> Exclude Event: <ignore>
 Amount Range: minimum to maximum Alloc. Fund: <multiple items selected>
 Batch Code: _____

Add search criteria to filter the Contribution Allocations List further.

Edit Sort Format Wrap Export Print Pivot

Contribution Allocation List [27 records found]

<input type="checkbox"/>	Contribution ID	Date	Contact ID	Last Name	First Name	MI	Amount	Fund ID	Fund
<input checked="" type="checkbox"/>	46916	7/5/2017	15332	Buffett	Warren		50,000.00	1	2017 Building Renovation
<input checked="" type="checkbox"/>	46503	4/28/2016	1948	Easler	James	Earl	500.00	22	2017 Disaster Relief Fund
<input checked="" type="checkbox"/>	46569	6/21/2016	12796	Kristenson	Joel	Anders	450.00	22	2017 Disaster Relief Fund
<input checked="" type="checkbox"/>	46570	6/22/2016	12796	Kristenson	Joel	Anders	5.00	22	2017 Disaster Relief Fund
<input checked="" type="checkbox"/>	46571	6/22/2016	12796	Kristenson	Joel	Anders	500.00	22	2017 Disaster Relief Fund
<input checked="" type="checkbox"/>	46583	11/2/2016	12796	Kristenson	Joel	Anders	10.00	22	2017 Disaster Relief Fund
<input checked="" type="checkbox"/>	46893	11/18/2016	15303	Horton	Billy Bob		55.00	22	2017 Disaster Relief Fund
<input checked="" type="checkbox"/>	46914	2/16/2017	12796	Kristenson	Joel	Anders	5.00	22	2017 Disaster Relief Fund
<input checked="" type="checkbox"/>	46571	6/22/2016	12796	Kristenson	Joel	Anders	5,000.00	21	2017 General Fund
<input checked="" type="checkbox"/>	46583	11/2/2016	12796	Kristenson	Joel	Anders	10.00	21	2017 General Fund
<input checked="" type="checkbox"/>	46893	11/18/2016	15303	Horton	Billy Bob		55.00	21	2017 General Fund
<input checked="" type="checkbox"/>	46914	2/16/2017	12796	Kristenson	Joel	Anders	5.00	21	2017 General Fund
<input checked="" type="checkbox"/>	46916	7/5/2017	15332	Buffett	Warren		50,000.00	21	2017 General Fund
<input checked="" type="checkbox"/>	46915	3/13/2017	15327	Smithers	Franky		27.00	23	2017 Hope for the Homeless Fund
<input checked="" type="checkbox"/>	46902	11/18/2017	89	Allanson	Willard	Graig	5,000.00	23	2017 Hope for the Homeless Fund
<input checked="" type="checkbox"/>	46905	12/8/2017	15305	Musk	Elon		2,630.00	23	2017 Hope for the Homeless Fund
<input checked="" type="checkbox"/>	46906	12/9/2017	1679	Hall	Nancy		195.00	23	2017 Hope for the Homeless Fund

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



Trail Blazer™

- 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

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