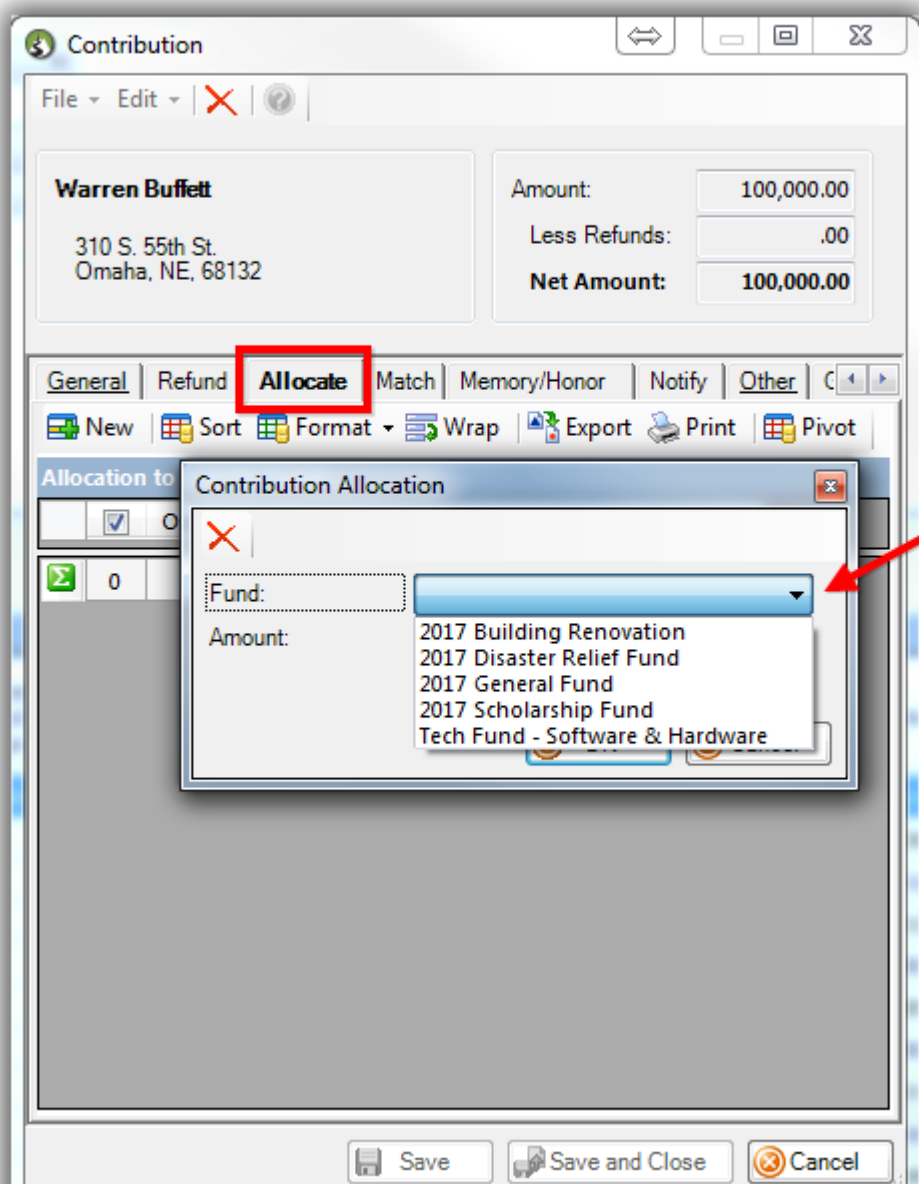**Author:** Kristenson, Joel

Last Updated: 2017-05-19

Overview

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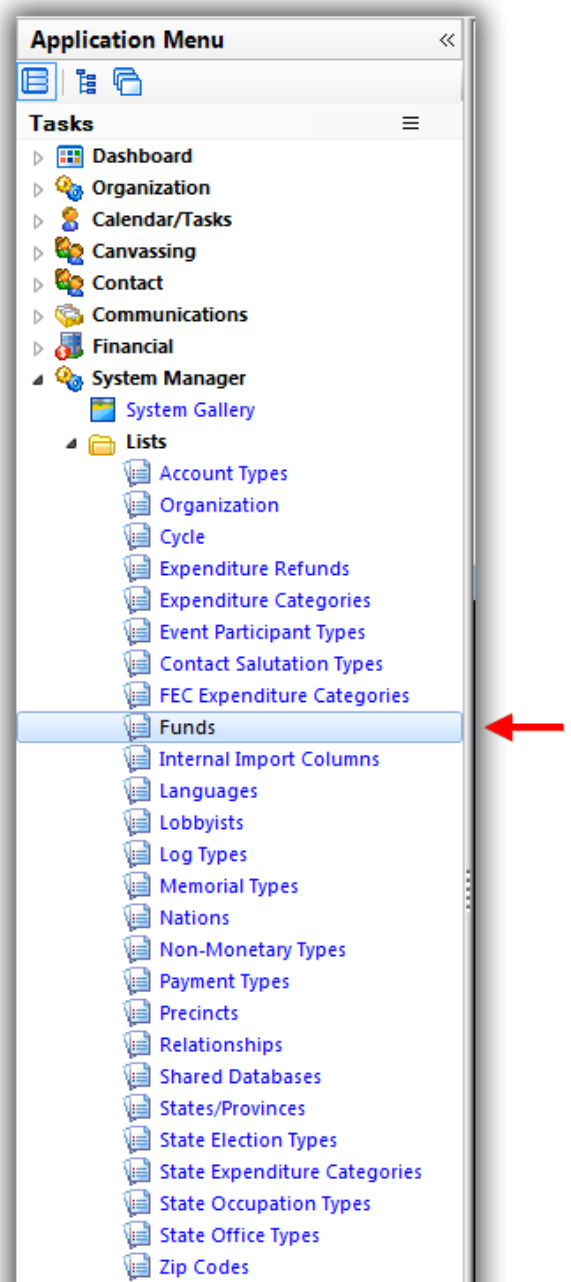
Example:

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**.
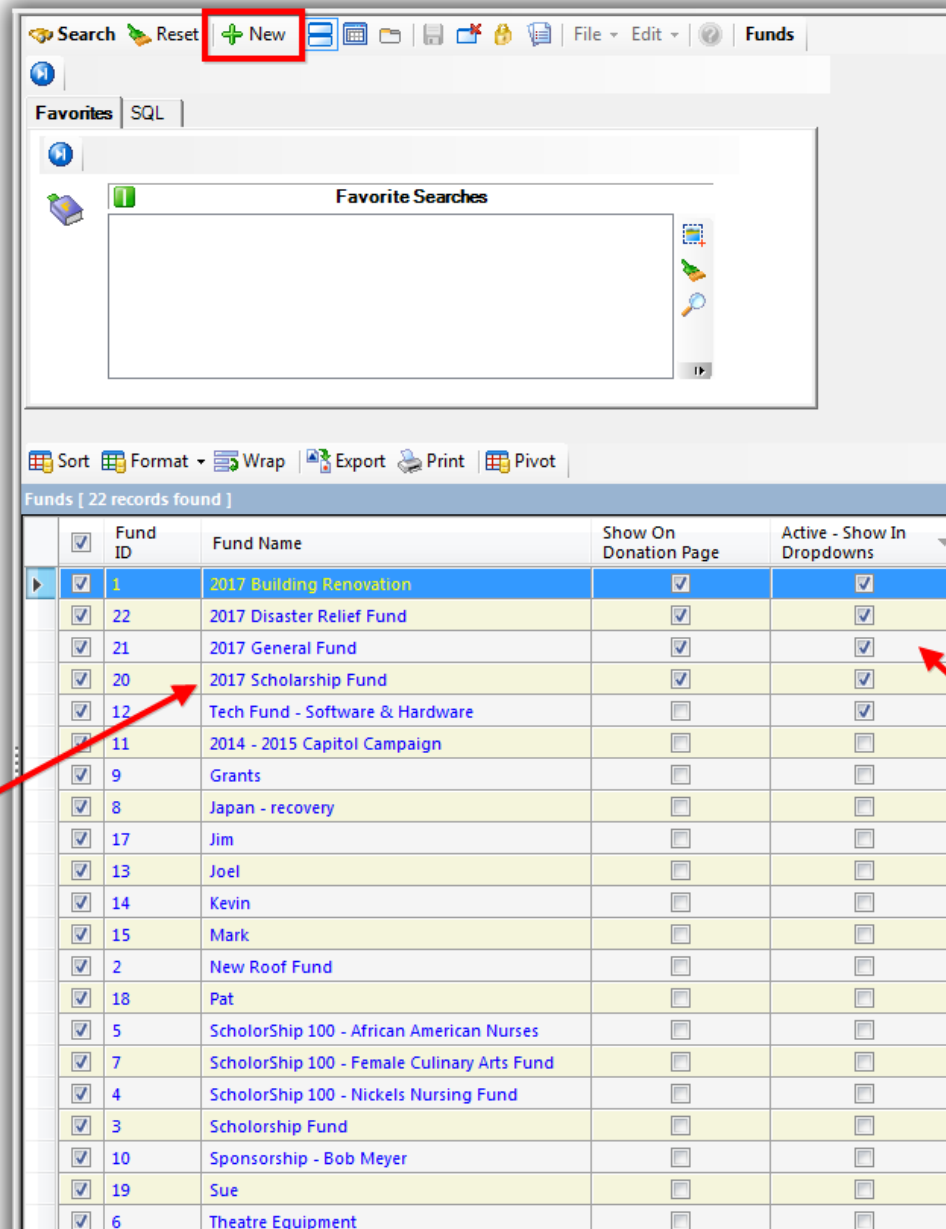
Steps

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.

*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.

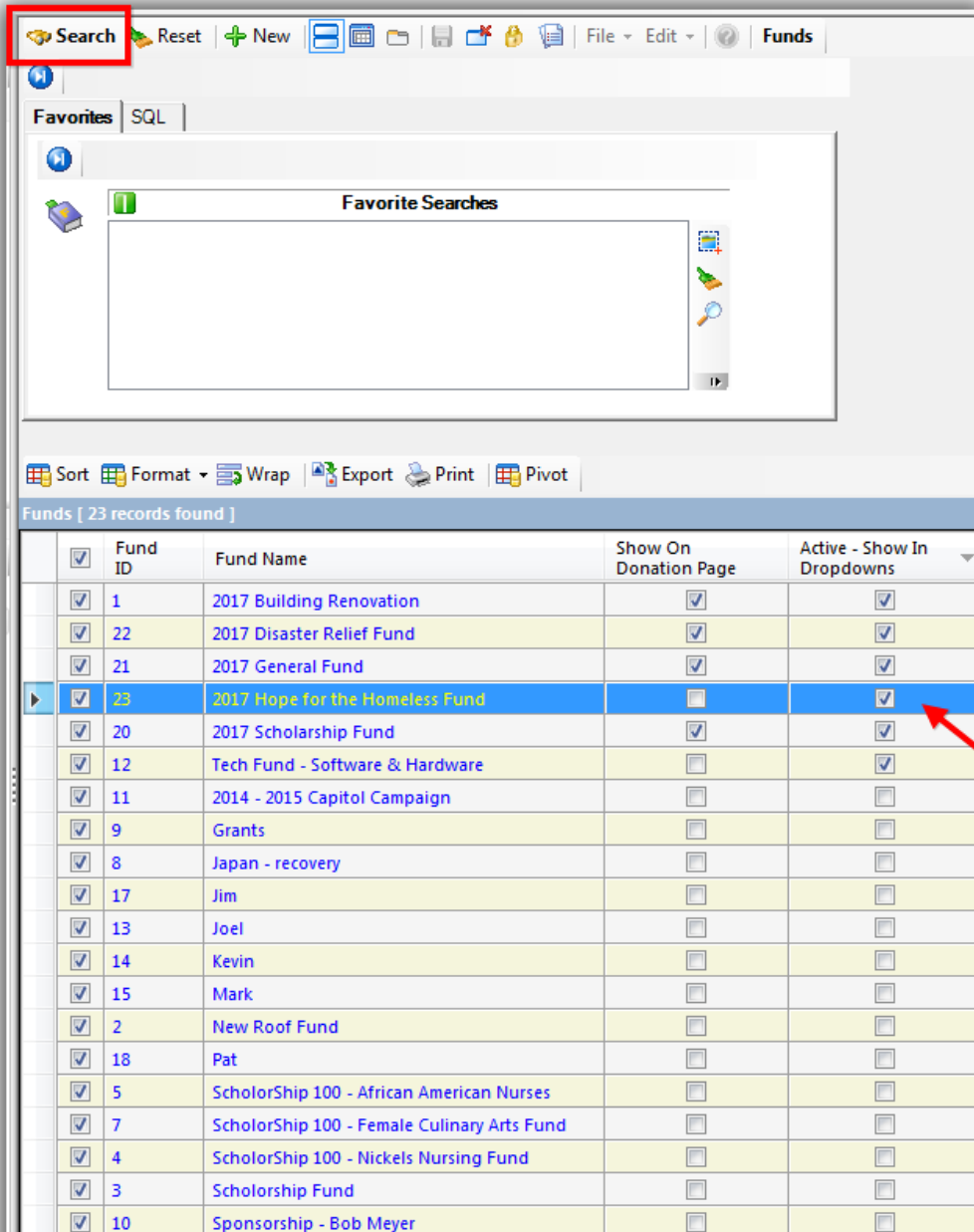**Funds that are currently active in the drop-down list will have this box checked.**

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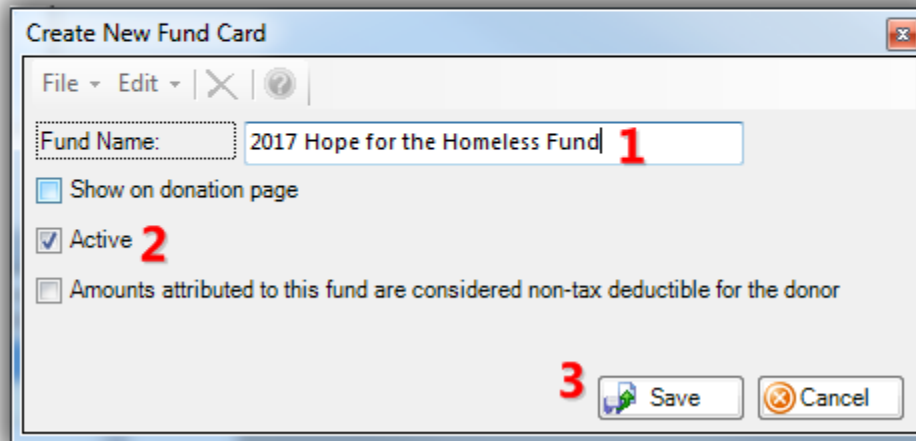
After adding a new fund, click **[Search]** to refresh the list and the new fund will display. *My example is below.*

Click [Search] to refresh the list.

		Fund ID	Fund Name	Show On Donation Page	Active - Show In Dropdowns
	✓	1	2017 Building Renovation	✓	✓
	✓	22	2017 Disaster Relief Fund	✓	✓
	✓	21	2017 General Fund	✓	✓
▶	✓	23	2017 Hope for the Homeless Fund	☐	✓
	✓	20	2017 Scholarship Fund	✓	✓
	✓	12	Tech Fund - Software & Hardware	☐	✓
	✓	11	2014 - 2015 Capitol Campaign	☐	☐
	✓	9	Grants	☐	☐
	✓	8	Japan - recovery	☐	☐
	✓	17	Jim	☐	☐
	✓	13	Joel	☐	☐
	✓	14	Kevin	☐	☐
	✓	15	Mark	☐	☐
	✓	2	New Roof Fund	☐	☐
	✓	18	Pat	☐	☐
	✓	5	ScholorShip 100 - African American Nurses	☐	☐
	✓	7	ScholorShip 100 - Female Culinary Arts Fund	☐	☐
	✓	4	ScholorShip 100 - Nickels Nursing Fund	☐	☐
	✓	3	Scholarship Fund	☐	☐
	✓	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.**
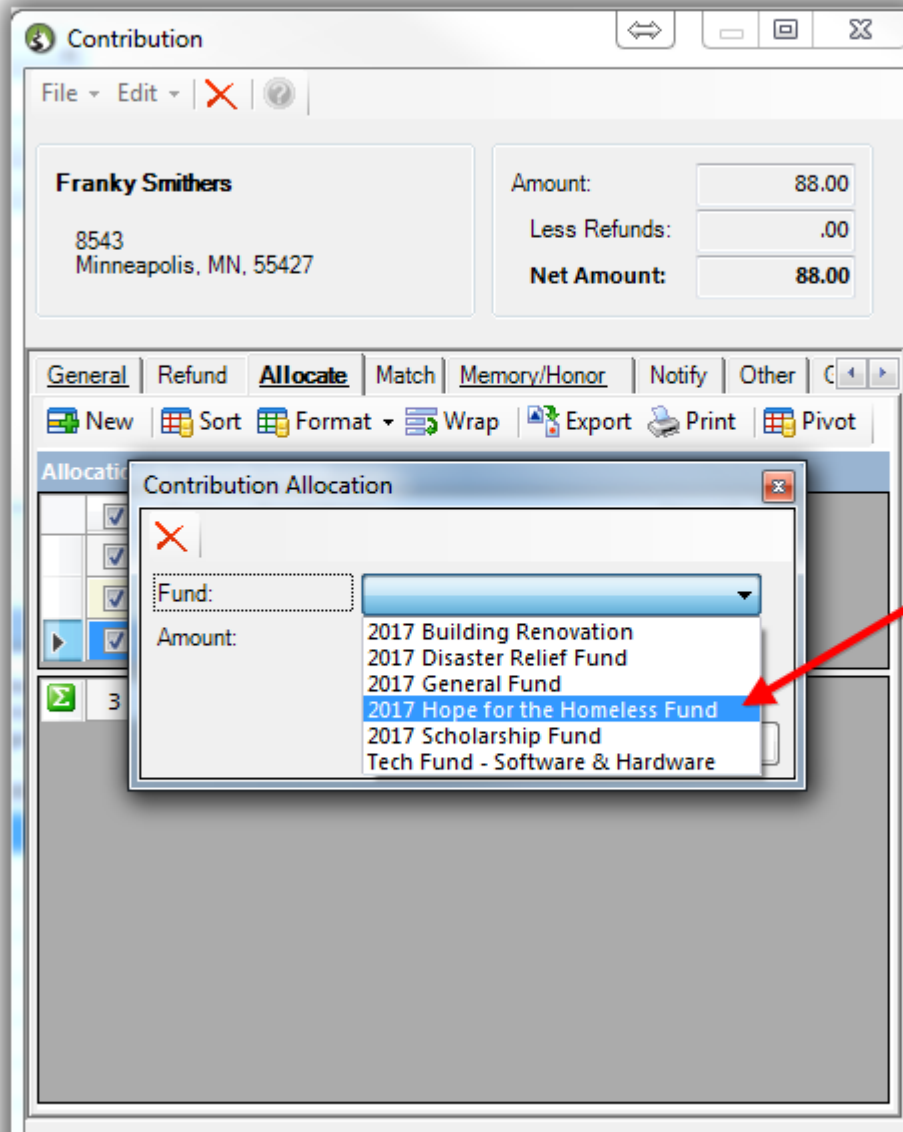
To **remove** a fund from the drop-down list, simply **reverse** the previous steps. **Open** the fund from the **Funds list**, and uncheck the **Active** box.

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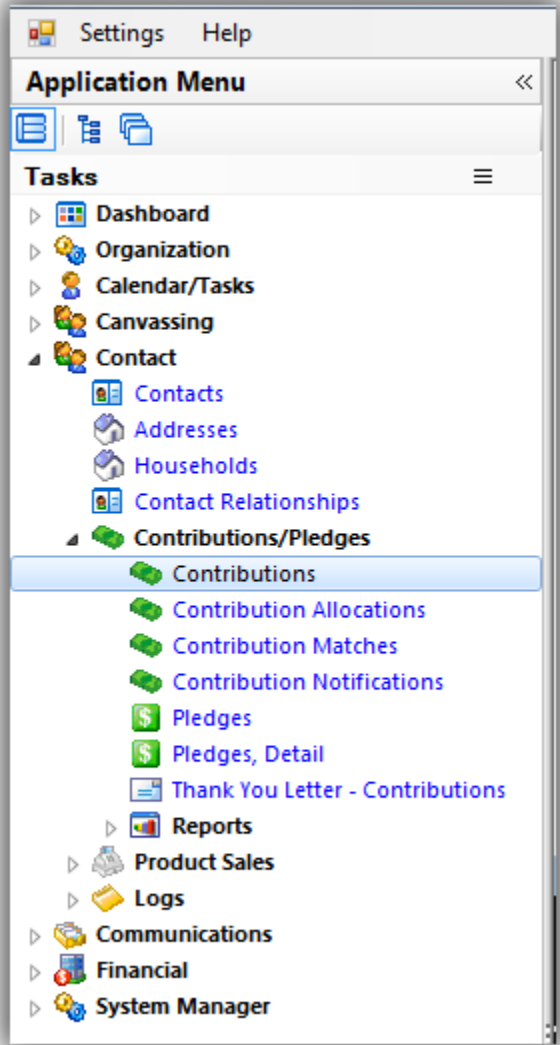
Img 2 of 2 – Search by Fund(s) and Add the Fund Column to the Grid

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

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

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

Contacts (Donors) Report by Fund

Img 1 of 2 – Navigate to the Contacts (Donors) List
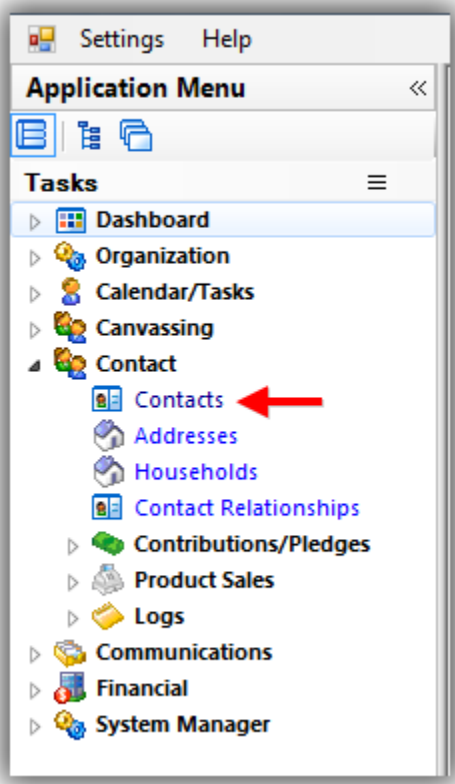
Img 2 of 2 – Search by Fund(s) Under the Contribute Tab

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

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

Add search criteria to filter the Contribution Allocations List further.

Contribution Allocation List [27 records found]

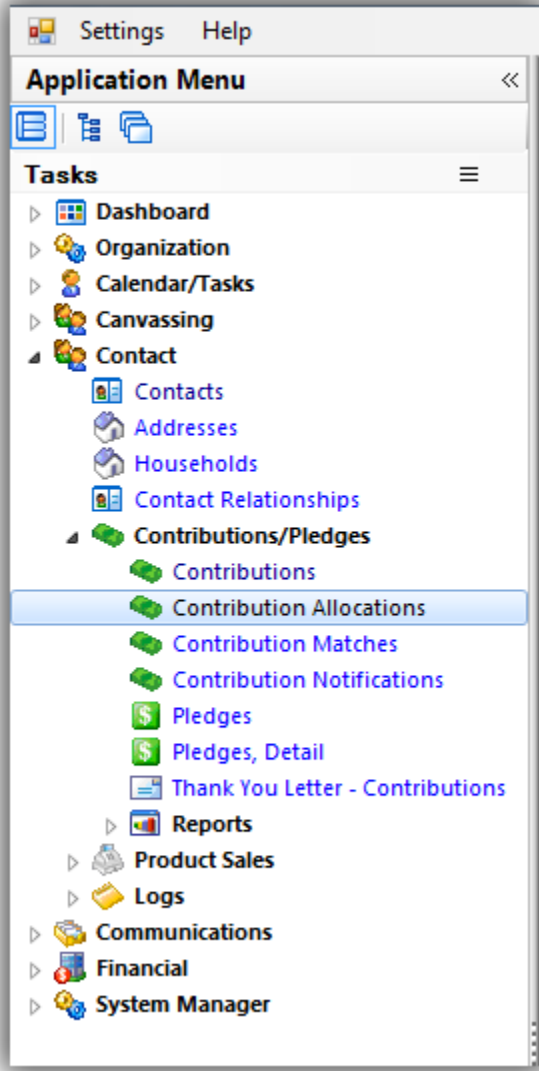|	Contri-bution ID	Date	Contact ID	Last Name	First Name	MI	Amount	Fund ID	Fund
☑	46916	7/5/2017	15332	Buffett	Warren		50,000.00	1	2017 Building Renovation
☑	46503	4/28/2016	1948	Easler	James	Earl	500.00	22	2017 Disaster Relief Fund
☑	46569	6/21/2016	12796	Kristenson	Joel	Anders	450.00	22	2017 Disaster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

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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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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.