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Overview

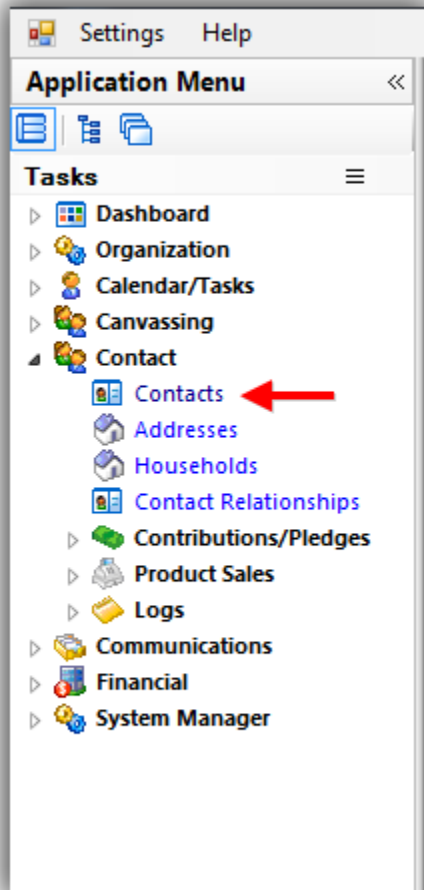
This article is primarily for nonprofits, but the techniques used are good for all **Trail Blazer** users to learn. It walks through the steps to create search queries that target **new (first time)** donors **this month**, and **this year**.

After you finish creating these types of reports (or other reports that you run often) you can add them onto your **dashboard**, [here's how](#).

 **Tip:** Read [this article](#) to learn how to create a popular query for donors who **gave last year** but unfortunately **not this year** (LYBUNT). Read [this article](#) to learn how to build and save a **custom report** with virtual **filtered columns** that goes hand-in-hand with the LYBUNT search query.

Steps – New Donors This Month

Open the **Contacts (Donors)** list.



Navigate to the **Contribute** tab, **plug** it in, select **This Month** from the date range drop-down, and click **[Search]**. *In my example it produced 28 donors.*

First search for all donors who gave 'this month'.

4 **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

2 **Search** **Reset** **New** **File** **Edit** **Include Other** **Contacts**

Date Range: **This month** Awaiting Thank-You Letters
 5/ 1/2017 <> 5/31/2017 Awaiting Thank-You Phone Call
 Cycle: <ignore> Payment Method: <ignore>
 Event: <ignore> Single Contribution
 Amount Range: minimum to maximum Allocation Fund: <ignore>

3. Select 'This Month' from the date range control.

results

Contacts [28 records found]

ID	Last Name	First Name	Street	Street 2	City	State	Zip Code	Home Phone	Email
14783		Abc Corp.							abc-company
14839		General Motors, Inc.	101 Big Car Rd		Detroit	MI	35101		
10965		Manchester College	603 College Ave		North Manchester	IN	14692		
10128		St. Mel Catholic Church	1808 Michael Pl		Albert Lea	MN	56007		
10112		The Kresge Foundation	5051 Haenke Rd		Mt Iron	MN	55768		
13	Abdi	Nimo	1201 Brook Ave SE	Apt 108	Minneapolis	MN	55414	(612) 532-8525	
33	Adam	Pamela	400 Lincoln St N		Redwood Falls	MN	56283	(507) 637-8627	
12809	Adams	kathey							k@b.com
140	Anderson	David	544 Mississippi River Blvd S		St Paul	MN	55116	(651) 224-9116	David@Anderson.com
371	Barnes	David	13329 Oakwood Dr		Rogers	MN	55374	(763) 428-9811	David@Barnes.com
1600	Daly	Richard	1204 Earley Shores Ln		Burnsville	MN	55306	(952) 435-8521	
1719	Denzen-Kelly	Maria	12633 Dutch Ct		Apple Valley	MN	55124	(952) 423-9718	Maria@Denzen-Kelly.com
15335	Flint	Charles	1 New Orchard Rd		Armonk	NY	10504	(914) 499-1900	email.technology@ibm.cloud
10580	Fritsch	Carl	141 Caps Trl		Lutsen	MN	55612		
14989	Fuller	Joseph	124 Bayview Dr		Oakdale	NY	11769		buyandsellrealty@aol.com
14941	Hedtke	Dawn	7566 Langley Ave NE		Albertville	MN	55301		
4261	Klingfus	Jerome	1111 9th Ave SW		Austin	MN	55912	(507) 433-8621	Jerome@Klingfus.com
4812	Lied	Mary	13204 Sheffield Ct		Burnsville	MN	55337	(952) 432-8926	Mary@Lied.com
5038	Madden	Bryan	11727 Virginia Cir N		Champlin	MN	55316	(763) 427-9414	
15308	Miller	Frankie Joe	616 Shore Dr N		Grand Marais	MN	55604		f.miller@icloud.me
14944	Nelson/Peterson	Daniel	5908 29th Pl N		Crystal	MN	55422		
15310	Ortega	Amancio	60 E Broadway	Space C185	Bloomington	MN	55425		ortega-amancio@icloud.me
6565	Petroski	James	1212 Yale Pl	Apt 357	Minneapolis	MN	55403	(612) 321-9513	James@Petroski.com

Expand the **Advanced Functions Tool Strip** under the **Contribute** tab and select the **[&]** button to add a SQL 'AND' statement.

1. Expand the Advanced Functions tool strip by clicking the blue and white arrow button.

Click the [&] button to add an AND statement.

Marketing Notion

Date: This month

Cycle: <ignore>

Event: <ignore>

Amount Range: minimum to maximum

Payment Method: <ignore>

Allocation Fund: <ignore>

Contacts [28 records found]

	ID	Last Name	First Name	Street	Street 2	City	State	Zip Code	Home Phone
	14783		Abc Corp.						
	14839		General Motors, Inc.	101 Big Car Rd		Detroit	MI	35101	
	10965		Manchester College	603 College Ave		North Manchester	IN	14692	
	10128		St. Mel Catholic Church	1808 Michael Pl		Albert Lea	MN	56007	
	10112		The Kresge Foundation	5051 Haenke Rd		Mt Iron	MN	55768	

Activate the sql **NOT** condition, set the **'end date'** for one day prior to the 1st day of the month you searched for donors 'in', and click **[Search]**. *In my example the end date was the last day of April, 2017 and the query returned 15 results for new donors this month.*

3

1. Activate the sql NOT condition.

2. Enter the 'end' date for the day 'previous' to the month you searched for donors 'in'.

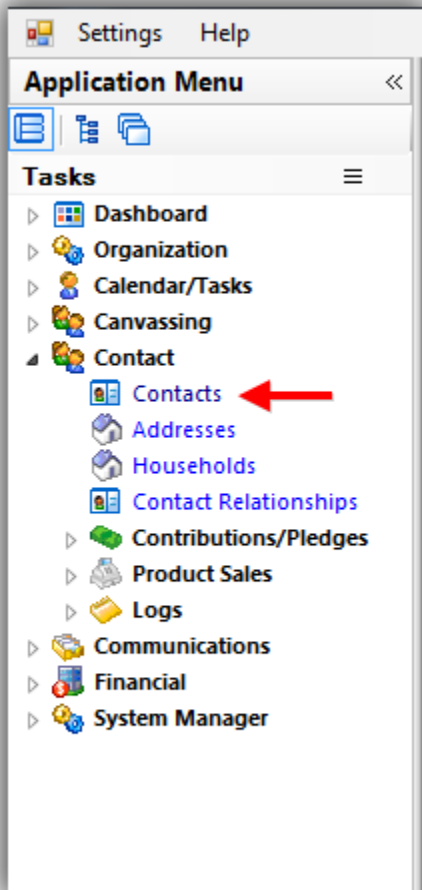
results

ID	Last Name	First Name	Street	Street 2	City	State	Zip Code	Home Phone	Email	Employer/Company Name
13	Abdi	Nimo	1201 Brook Ave SE	Apt 108	Minneapolis	MN	55414	(612) 532-8525		
33	Adam	Pamela	400 Lincoln St N		Redwood Falls	MN	56283	(507) 637-8627		
140	Anderson	David	544 Mississippi River Blvd S		St Paul	MN	55116	(651) 224-9116	David@Anderson.com	
371	Barnes	David	13329 Oakwood Dr		Rogers	MN	55374	(763) 428-9811	David@Barnes.com	
1719	Denzen-Kelly	Maria	12633 Dutch Ct		Apple Valley	MN	55124	(952) 423-9718	Maria@Denzen-Kelly.com	
4812	Lied	Mary	13204 Sheffield Ct		Burnsville	MN	55337	(952) 432-8926	Mary@Lied.com	
6565	Petroski	James	1212 Yale Pl	Apt 357	Minneapolis	MN	55403	(612) 321-9513	James@Petroski.com	
7261	Salisbury	Carmella	1057 Westwood Dr		Faribault	MN	55021	(507) 334-8426	Carmella@Salisbury.com	
7799	Soderlund	Leah	1169 Burnquist St		St Paul	MN	55106	(651) 329-9218		
10112		The Kresge Foundation	5051 Haenke Rd		Mt Iron	MN	55768			
11274	Smith	John	12985 192 1/2 Cir NW		Elk River	MN	55330	(612) 483-7851	John@Smith.com	
12809	Adams	kathey							k@b.com	
15308	Miller	Frankie Joe	616 Shore Dr N		Grand Marais	MN	55604		f.miller@icloud.me	NA
15310	Ortega	Amancio	60 E Broadway	Space C185	Bloomington	MN	55425		ortega-amancio@icloud.me	Self
15335	Flint	Charles	1 New Orchard Rd		Armonk	NY	10504	(914) 499-1900	email.technology@ibm.cloud	IBM

The next section will show how to find new donors this year. Take a look at the **related resources** at the bottom of the article to find other useful articles and videos related to this topic.

Steps – New Donors This Year

Open the **Contacts (Donors)** list.



Navigate to the **Contribute** tab, **plug** it in, select **This Year** from the date range control, and click **[Search]**. *In my example it produced 38 donors.*

3

1

2. Select 'This Year' from the date range control.

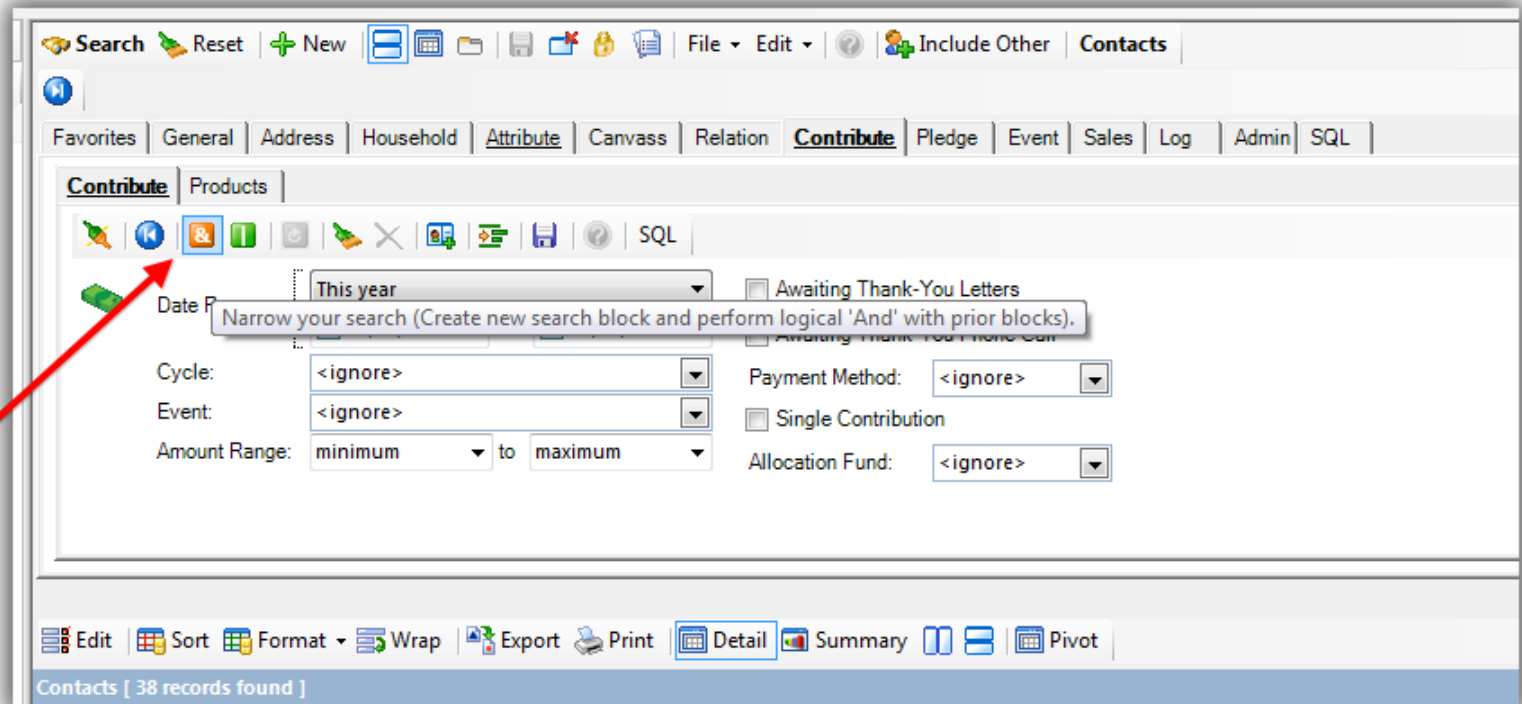
results

Contacts [38 records found]

ID	Last Name	First Name	Street	City	State	Zip Code	Home Phone	Email
13	Abdi	Nimo	1201 Brook Ave SE	Minneapolis	MN	55414	(612) 532-8525	
33	Adam	Pamela	400 Lincoln St N	Redwood Falls	MN	56283	(507) 637-8627	
89	Allanson	Willard	2652 Paradise Trl NW	Isanti	MN	55040	(763) 444-7434	
132	Anderson	Carol	1551 Falcon Dr	Fairmont	MN	56031	(507) 236-8420	Carol@Anderson.com
140	Anderson	David	544 Mississippi River Blvd S	St Paul	MN	55116	(651) 224-9116	David@Anderson.com
258	Armitage	Benjamin	14960 Storms Cir SE	Prior Lake	MN	55372	(612) 724-9616	
371	Barnes	David	13329 Oakwood Dr	Rogers	MN	55374	(763) 428-9811	David@Barnes.com
1600	Daly	Richard	1204 Earley Shores Ln	Burnsville	MN	55306	(952) 435-8521	
1679	Hall	Nancy	14464 Eldorado St NW	Andover	CT	06500	(763) 433-8725	Nancy@Hall.com
1719	Denzen-Kelly	Maria	12633 Dutch Ct	Apple Valley	MN	55124	(952) 423-9718	Maria@Denzen-Kelly.com
4261	Klingfus	Jerome	1111 9th Ave SW	Austin	MN	55912	(507) 433-8621	Jerome@Klingfus.com
4812	Lied	Mary	13204 Sheffield Ct	Burnsville	MN	55337	(952) 432-8926	Mary@Lied.com
5038	Madden	Bryan	11727 Virginia Cir N	Champlin	MN	55316	(763) 427-9414	
6565	Petroski	James	1212 Yale Pl	Minneapolis	MN	55403	(612) 321-9513	James@Petroski.com
7261	Salisbury	Carmella	1057 Westwood Dr	Faribault	MN	55021	(507) 334-8426	Carmella@Salisbury.com
7799	Soderlund	Leah	1169 Burnquist St	St Paul	MN	55106	(651) 329-9218	
8265	Thoennes	Richard	1129 Thorndale Ave	New Brighton	MN	55112	(651) 639-8723	
10112		The Kresge Foundation	5051 Haenke Rd	Mt Iron	MN	55768		
10128		St. Mel Catholic Church	1808 Michael Pl	Albert Lea	MN	56007		
10580	Fritsch	Carl	141 Caps Trl	Lutsen	MN	55612		
10965		Manchester College	603 College Ave	North Manchester	IN	14692		
11274	Smith	John	12985 192 1/2 Cir NW	Elk River	MN	55330	(612) 483-7851	John@Smith.com
12796	Kristenson	Joel	9110 Golden Valley Rd	Golden Valley	MN	55427	(843) 442-1919	jkristenson@trailblz.com

Click the **[&]** button on the **Advanced Functions** tool strip under the **Contribute** tab to add a sql **AND** statement.

**Click the [&]
button to add
and sql AND
statement.**



Under the new **Contribute** tab that opens, activate the **[NOT]** condition, set an **end date** that's **one day prior** to the start of the year you searched for donors 'in', and click **[Search]**. *In my example I set an end date of 12/31/16 and the final query results were 20 new donors this year.*

3

Search Reset New [Icons] File Edit Include Other Contacts

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

Contribute Products

Contribute & Contribute [Icons] SQL

Date Range: <custom, according to dates below> [Calendar] 12/31/2016

Cycle: <ignore>

Event: <ignore>

Amount Range: minimum to maximum

Awaiting Thank-You Letters
 Awaiting Thank-You Phone Call
 Payment Method: <ignore>
 Single Contribution
 Allocation Fund: <ignore>

results

Contacts [20 records found]

<input checked="" type="checkbox"/>	ID	Last Name	First Name	Street	Street 2	City	State	Zip Code	Home Phone	Email	Employer/Company Name
<input checked="" type="checkbox"/>	15304		Hormel Foods	6500 City Pkwy W	Apt 102	Eden Prairie	MN	55344		info@hormel-foods.com	
<input checked="" type="checkbox"/>	10112		The Kresge Foundation	5051 Haenke Rd		Mt Iron	MN	55768			
<input checked="" type="checkbox"/>	13	Abdi	Nimo	1201 Brook Ave SE	Apt 108	Minneapolis	MN	55414	(612) 532-8525		
<input checked="" type="checkbox"/>	33	Adam	Pamela	400 Lincoln St N		Redwood Falls	MN	56283	(507) 637-8627		
<input checked="" type="checkbox"/>	12809	Adams	kathey							k@b.com	
<input checked="" type="checkbox"/>	140	Anderson	David	544 Mississippi River Blvd S		St Paul	MN	55116	(651) 224-9116	David@Anderson.com	
<input checked="" type="checkbox"/>	371	Barnes	David	13329 Oakwood Dr		Rogers	MN	55374	(763) 428-9811	David@Barnes.com	
<input checked="" type="checkbox"/>	15332	Buffett	Warren	310 S. 55th St.		Omaha	NE	68132	(321) 564-8978	invest.buffett@money.org	Self Employed Investor
<input checked="" type="checkbox"/>	1719	Denzen-Kelly	Maria	12633 Dutch Ct		Apple Valley	MN	55124	(952) 423-9718	Maria@Denzen-Kelly.com	
<input checked="" type="checkbox"/>	15335	Flint	Charles	1 New Orchard Rd		Armonk	NY	10504	(914) 499-1900	email.technology@ibm.cloud	IBM
<input checked="" type="checkbox"/>	4812	Lied	Mary	13204 Sheffield Ct		Burnsville	MN	55337	(952) 432-8926	Mary@Lied.com	
<input checked="" type="checkbox"/>	5038	Madden	Bryan	11727 Virginia Cir N		Champlin	MN	55316	(763) 427-9414		
<input checked="" type="checkbox"/>	15308	Miller	Frankie Joe	616 Shore Dr N		Grand Marais	MN	55604		f.miller@icloud.me	NA
<input checked="" type="checkbox"/>	15305	Musk	Elon	12 Savona Rd		Bel Air	CA	21014		musk.elon@tesla-cars.com	Self-Employed
<input checked="" type="checkbox"/>	15310	Ortega	Amancio	60 E Broadway	Space C185	Bloomington	MN	55425		ortega-amancio@icloud.me	Self
<input checked="" type="checkbox"/>	6565	Petroski	James	1212 Yale Pl	Apt 357	Minneapolis	MN	55403	(612) 321-9513	James@Petroski.com	
<input checked="" type="checkbox"/>	7261	Salisbury	Carmella	1057 Westwood Dr		Faribault	MN	55021	(507) 334-8426	Carmella@Salisbury.com	

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



Trail Blazer™

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

Related Resources

Article: [How to Create a Year-by-Year Giving History Report using Filtered Contribution Columns in the Grid – Primarily for Nonprofits](#)

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

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

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

Article: [Building a Search Query for ‘First Time Donors’ THIS Year – Save and Load it as a Favorite & Add it to your Dashboard](#)

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

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

Video: [Filter Using New Date Controls](#)

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

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

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

Video: [Getting Started 101 – Orientation to the screen](#)

Trail Blazer Live Support

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✉ **Email:** support@trailblz.com

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

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

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** This service is included in your contract.*