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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**.

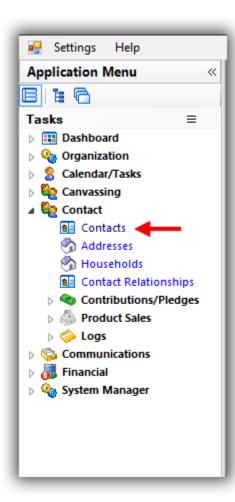
After you finish creating these types of reports (or other reports that you run often) you can add them onto your **dashboard**, <u>here's how</u>.

Tip: Read <u>this article</u> to learn how to create a popular query for donors who gave last year but unfortunately not this year (LYBUNT). Read <u>this</u> <u>article</u> 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.*

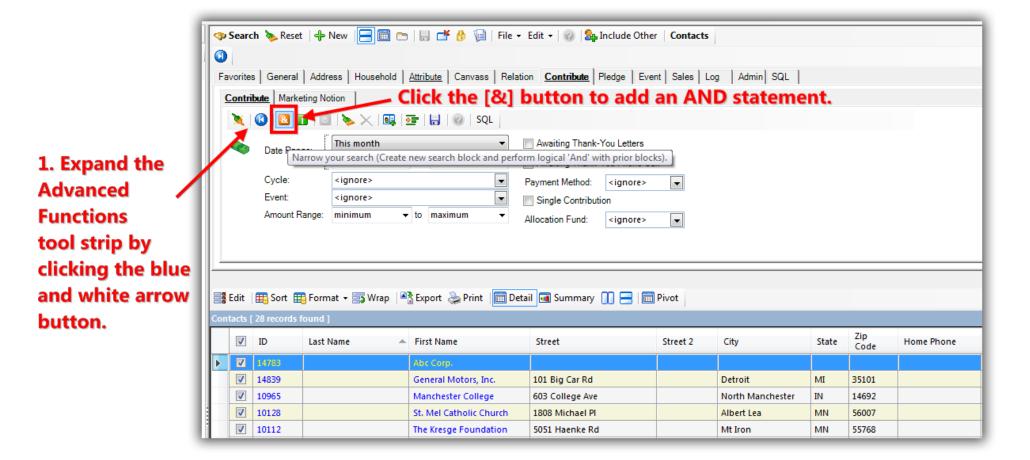


First search for all donors who gave 'this month'.

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| | | ✓ 14839 | | General Motors, Inc. | 101 Big Car Rd | | Detroit | MI | 35101 | | |
| | [| 10965 | | Manchester College | 603 College Ave | | North Manchester | IN | 14692 | | |
| | 1 | 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 | (507) 477 0524 | |
| | | ✓ 4261✓ 4812 | Klingfus | Jerome | 1111 9th Ave SW | | Austin | MN | 55912 | (507) 433-8621 | Jerome@Klingfus.com |
| | | | Lied Madden | Mary | 13204 Sheffield Ct | | Burnsville | MN | 55337 | (952) 432-8926 | Mary@Lied.com |
| | | ✓ 5038 ✓ 15308 | Miller | Bryan Frankie Joe | 11727 Virginia Cir N 616 Shore Dr N | | Champlin Grand Marais | MN | 55316 55604 | (763) 427-9414 | f.miller@icloud.me |
| | | ✓ 13508 ✓ 14944 | Nelson/Peterson | Daniel | 5908 29th PI N | | Crystal | MN | 55422 | | Taniner without ane |
| | | ✓ 14944 ✓ 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 |
| | | | | | | | | | 55405 | (012) 021-0010 | sames ar en osta com |



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



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.*



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| | | | 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 | |
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| | | | 7261 | Salisbury | Carmella | 1057 Westwood Dr | Apt 557 | Faribault | MN | 55021 | (507) 334-8426 | Carmella@Salisbury.com | |
| | | | 7799 | Soderlund | Leah | 1169 Burnquist St | | St Paul | MN | 55106 | (651) 329-9218 | cannend gransbury.com | |
| | | | 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 |
| | Þ | | 15335 | Flint | Charles | 1 New Orchard Rd | | Armonk | NY | 10504 | (914) 499-1900 | email.technology@ibm.cloud | IBM |
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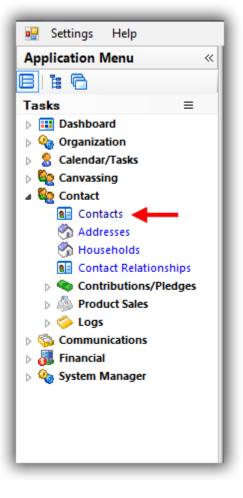


The next section will show how to find new donors this year. Take a look at the **related resources** at the bottom of the article to find other useful articles and videos related to this topic.

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.



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| | ▼ 89 | | Allanson | Willard | 2652 Paradise Trl NW | | | 50205 | (507) 057-0027 | |
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Click the [&] button on the Advanced Functions tool strip under the Contribute tab to add a sql AND statement.

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