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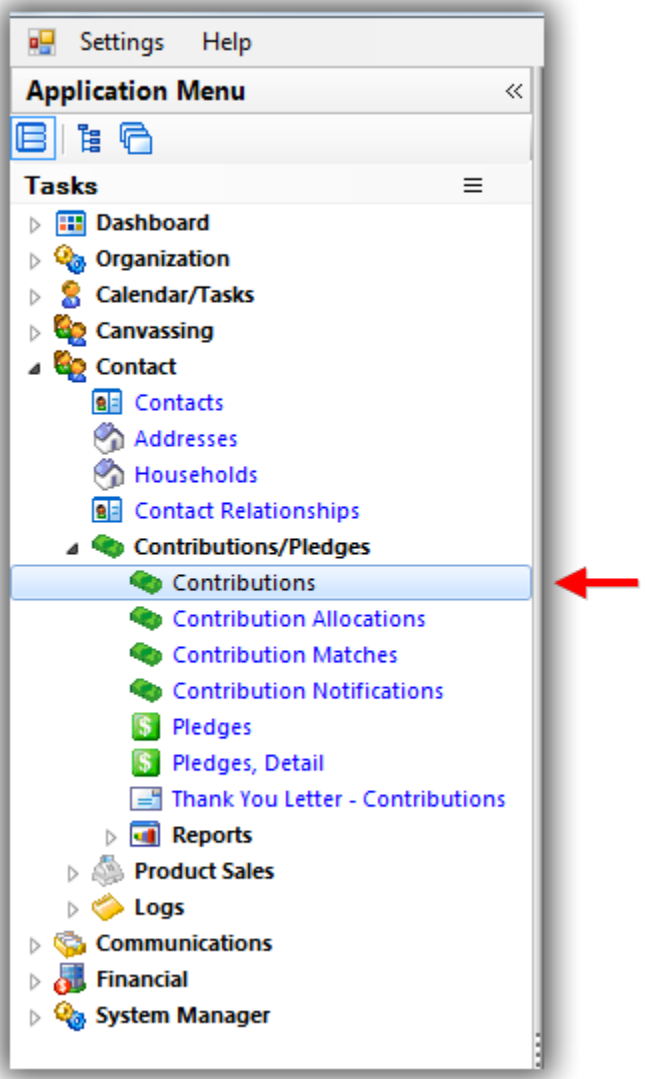
Overview

This article walks through the steps to quickly **batch enter** donations in **Trail Blazer** (instead of going through one donor record at-a-time to enter gifts).

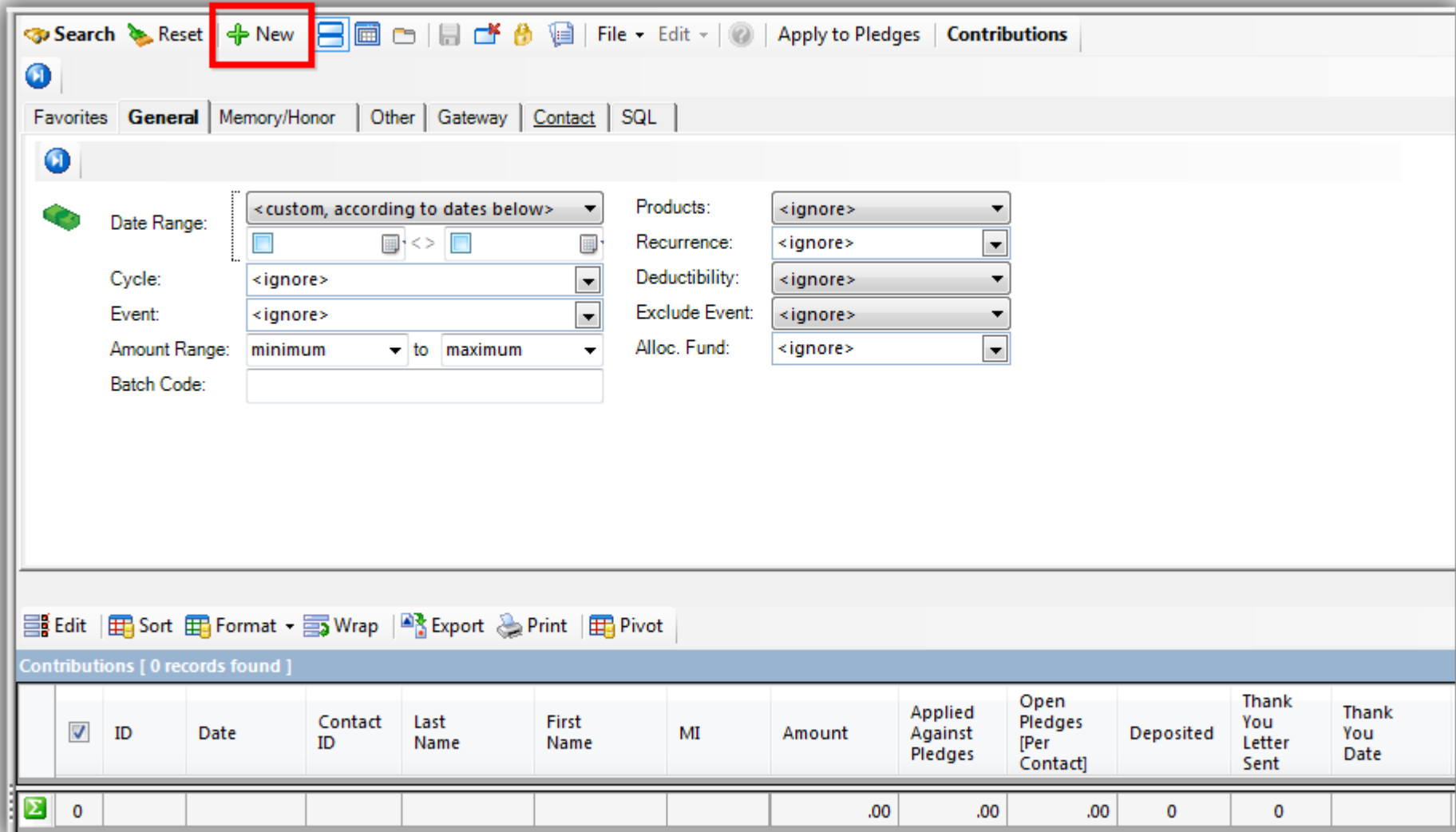
 **Tip:** Add [events](#) to the donation form drop-down to track the **source** of a donation, and use [allocation funds](#) to track where the money is **going**.

Steps

Open the **Contributions** list.



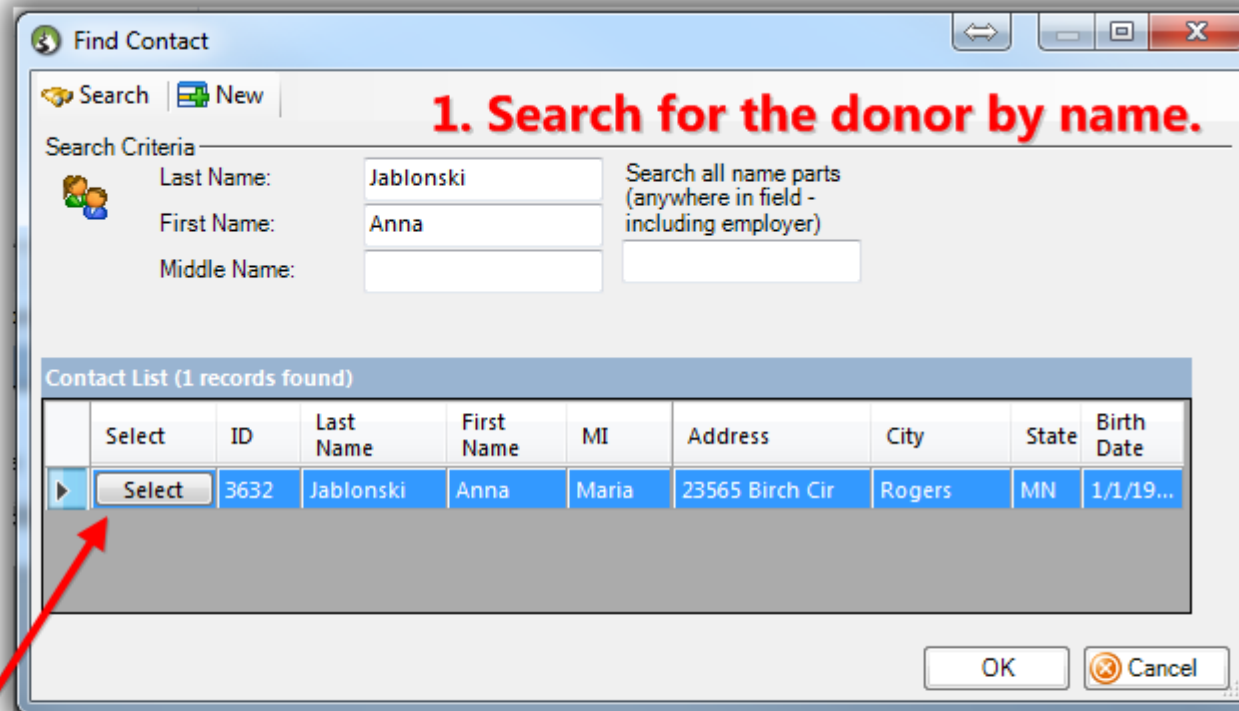
Click the **[+ New]** button from the Search Tool Strip.



The screenshot shows the TrailBlazer software interface. At the top, there is a menu bar with icons for Search, Reset, **New** (highlighted with a red box), and Apply to Pledges. Below the menu bar, there are tabs for Favorites, General, Memory/Honor, Other, Gateway, Contact, and SQL. The main area contains a form for entering donation details, including fields for Date Range, Cycle, Event, Amount Range, Batch Code, Products, Recurrence, Deductibility, Exclude Event, and Alloc. Fund. At the bottom, there is a table with columns for ID, Date, Contact ID, Last Name, First Name, MI, Amount, Applied Against Pledges, Open Pledges [Per Contact], Deposited, Thank You Letter Sent, and Thank You Date. The table shows 0 records found.

<input checked="" type="checkbox"/>	ID	Date	Contact ID	Last Name	First Name	MI	Amount	Applied Against Pledges	Open Pledges [Per Contact]	Deposited	Thank You Letter Sent	Thank You Date
	0						.00	.00	.00	0	0	

Search for the donor by name and **select** them from the list. *If they don't exist you'll need to click [+ New] and add them as a new record.*

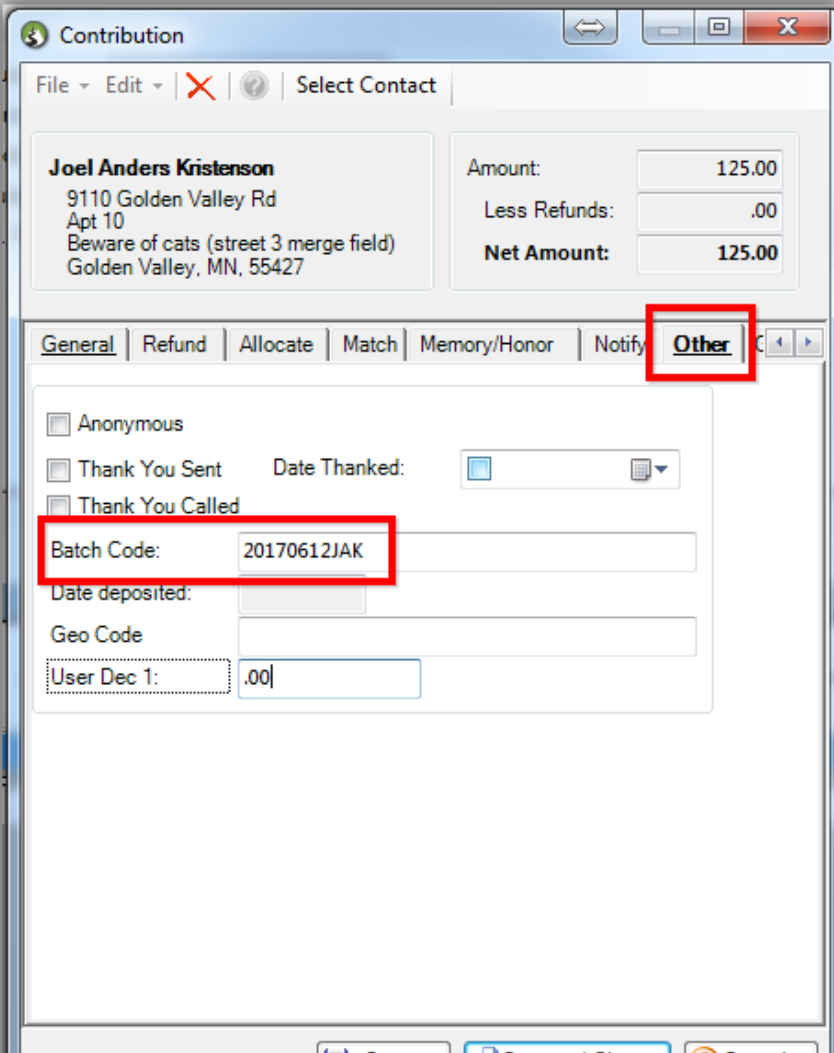


2. *If they exist in your database already, click [Select].

If they don't, you'll need to click [+ New] and add them as a contact new record.

 **Tip:** Many organizations record a **Batch Code** when recording donations. You can do this under the **Other Tab**:

Tip: It's a good idea to create a Batch Code as you enter donations as a batch. This is typically used for the reports and exports to reconcile with your accounting system.



Contribution

File Edit Select Contact

Joel Anders Kristenson
9110 Golden Valley Rd
Apt 10
Beware of cats (street 3 merge field)
Golden Valley, MN, 55427

Amount: 125.00
Less Refunds: .00
Net Amount: 125.00

General Refund Allocate Match Memory/Honor Notify **Other**

Anonymous
 Thank You Sent Date Thanked:
 Thank You Called

Batch Code: 20170612JAK

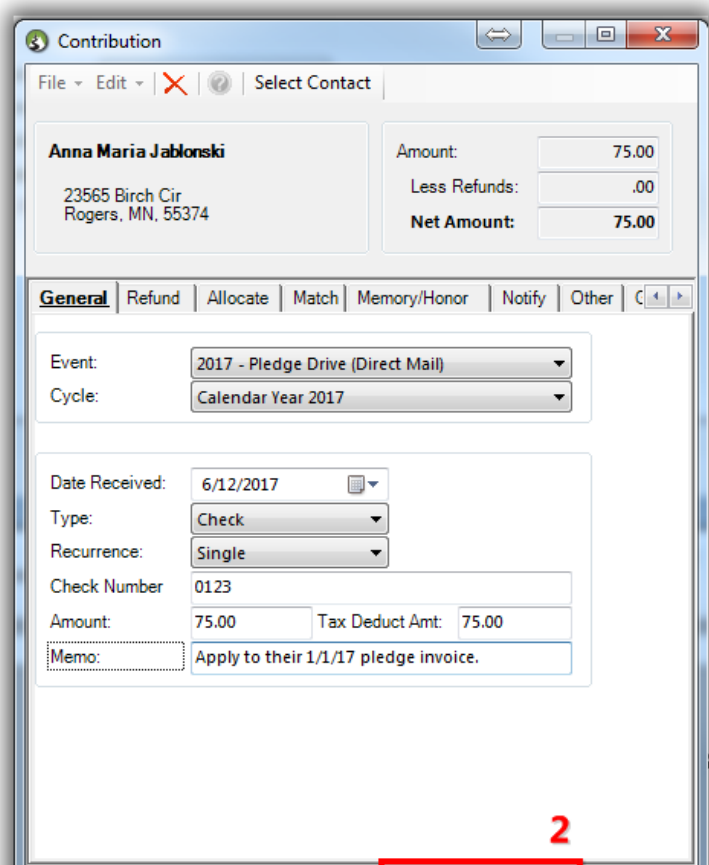
Date deposited:
Geo Code:
User Dec 1: .00

Save Save and Close Cancel

Fill out the donation form and then click **[Save and Close]**. *Some common information would include the [event \(source\)](#), **date**, **amount**, [allocation fund](#), **memo**, and **batch code**. My example is below for a \$75.00 donation by check.*

1. Fill out all the details for the donation in the different tabs such as:

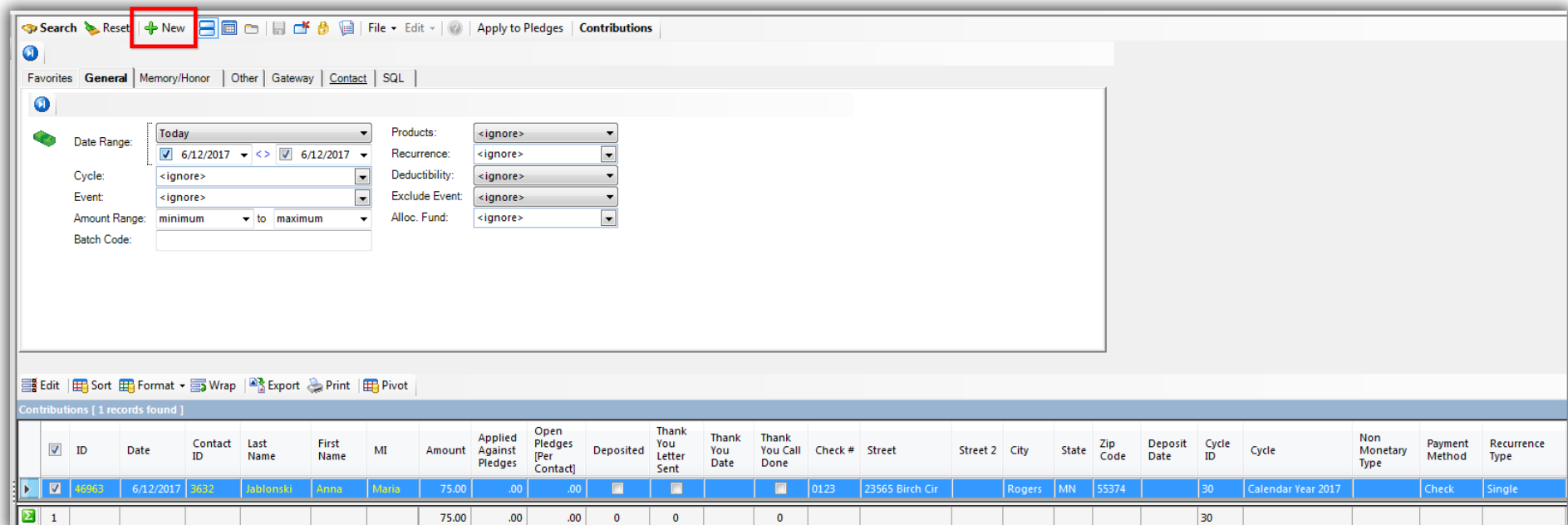
- **Date**
- **Amount**
- **Source (event)**
- **Cycle**
- **Allocation Fund**
- **Memo**
- **Etc**



The screenshot shows the 'Contribution' window in TrailBlazer. At the top, there's a menu bar with 'File', 'Edit', and 'Select Contact'. Below that, the donor information for 'Anna Maria Jablonski' is displayed, including her address: '23565 Birch Cir, Rogers, MN, 55374'. To the right, a summary table shows: Amount: 75.00, Less Refunds: .00, and Net Amount: 75.00. The 'General' tab is selected, showing dropdown menus for 'Event' (2017 - Pledge Drive (Direct Mail)) and 'Cycle' (Calendar Year 2017). Below these are fields for 'Date Received' (6/12/2017), 'Type' (Check), and 'Recurrence' (Single). The 'Check Number' is 0123, and the 'Amount' and 'Tax Deduct Amt' are both 75.00. A 'Memo' field contains the text 'Apply to their 1/1/17 pledge invoice.' A red box with the number '2' is at the bottom of the window.

The new donation will display in the grid. Click the **[+ New]** button to begin adding the **next donation** in your **batch**. **Repeat** these steps until **all** donations have been entered.

Click [+ New] to enter the next donation for your batch.



The screenshot shows the TrailBlazer software interface. At the top, there is a menu bar with 'Search', 'Reset', and a '+ New' button highlighted with a red box. Below the menu bar, there are tabs for 'General', 'Memory/Honor', 'Other', 'Gateway', 'Contact', and 'SQL'. The main area contains a form with various fields for entering donation details, including 'Date Range', 'Cycle', 'Event', 'Amount Range', 'Batch Code', 'Products', 'Recurrence', 'Deductibility', 'Exclude Event', and 'Alloc. Fund'. Below the form, there is a toolbar with 'Edit', 'Sort', 'Format', 'Wrap', 'Export', 'Print', and 'Pivot' options. At the bottom, there is a grid titled 'Contributions [1 records found]' with the following data:

	ID	Date	Contact ID	Last Name	First Name	MI	Amount	Applied Against Pledges	Open Pledges [Per Contact]	Deposited	Thank You Letter Sent	Thank You Date	Thank You Call Done	Check #	Street	Street 2	City	State	Zip Code	Deposit Date	Cycle ID	Cycle	Non Monetary Type	Payment Method	Recurrence Type
1	46963	6/12/2017	3632	Jablonski	Anna	Maria	75.00	.00	.00	0	0	0	0	0123	23565 Birch Cir		Rogers	MN	55374		30	Calendar Year 2017		Check	Single

The donations that you're entering in batch will display in the grid/list so that you can verify everything is being entered correctly and that the totals match your accounting system.

Once you're finished with entering the donations in your batch they'll all **display** in the **grid**. *My finished example is below.*

After entering the batch of donations, they will display in the grid.

You can search by a batch code here.

if you record a batch code during the batch entry, it will display here.

ID	Date	Contact ID	Last Name	First Name	Amount	Applied Against Pledges	Open Pledges (Per Contact)	Deposited	Thank You Letter Sent	Thank You Date	Thank You Call Done	Check #	Street	Street 2	City	State	Zip Code	Deposit Date	Cycle ID	Cycle	Non Monetary Type	Payment Method	Recurrence Type	Batch Code
46966	6/12/2017	20	Abrahamian	David	25.00	.00	.00						6012 Beard Ave S		Edina	MN	55410		30	Calendar Year 2017		Check	Single	20170612JAK
46965	6/12/2017	4598	Langhoff	Renae	1,025.00	.00	.00						701 Oak Park Ln	Apt 71	Hopkins	MN	55343		30	Calendar Year 2017		Check	Single	20170612JAK
46964	6/12/2017	12796	Kristenson	Joel	125.00	.00	.00						9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427		30	Calendar Year 2017		Check	Single	20170612JAK
46963	6/12/2017	3632	Jablonski	Anna	75.00	.00	.00					0123	23565 Birch Cir		Rogers	MN	55374		30	Calendar Year 2017		Check	Single	20170612JAK
46969	6/11/2017	4448	Pilch	Rosem...	6,000.00	.00	.00					9987	8413 Meadow Lake Rd E		New Hope	CT	06500		30	Calendar Year 2017		Check	Single	20170612JAK
46967	6/10/2017	924	Brown	Andrea	500.00	.00	.00					11426	3513 Lee Ave N		Crystal	CT	06500		30	Calendar Year 2017		Cash	Single	20170612JAK
46968	6/9/2017	260	Rapuano	Brenda	45.00	.00	.00					8794	1471 Clarence St		St Paul	CT	06500		30	Calendar Year 2017		Check	Single	20170612JAK
46971	6/6/2017	152	Anderson	Jack	78.00	.00	.00					9874	6721 116 1/2 Cir N		Champlin	MN	55316		30	Calendar Year 2017		Check	Single	20170612JAK
46970	6/5/2017	2492	Walton	Melody	15.00	.00	.00						22146 Firelight Dr		Park Rapids	CT	06500		30	Calendar Year 2017		Cash	Single	20170612JAK
total					7,888.00	.00	.00	0	0	0									270					

If you work with a 3rd party accounting system like [QuickBooks](#), it's not uncommon that a bookkeeper will need this list of donations to **reconcile** with that account. You can run an [export of the data](#) to a .csv spreadsheet or you can take the total amount and record a [journal entry](#) into that system.

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



Trail Blazer™

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

Related Resources

Article: [How to Add a New 'Event' to the Drop-Down List for Entering Donations](#)

Article: [How to Add and Remove Allocation Funds to the Donation Form Drop-Down Inside the Trail Blazer Database](#)

Article: [Importing Contributions](#)

Article: [Entering Contributions](#)

Article: [Recording Non-Monetary \(In-Kind\) Contributions and Creating New Non-Monetary Types](#)

Article: [Tax Deductible Contributions – How to Record the Tax-Deductible Amount and How to Mass Update a List of Contributions with a Tax-Deductible Percentage](#)

Video: [Getting Started 106a – Entering Contributions \(NON PROFIT ONLY\)](#)

Video: [Importing Contributions](#)

Video: [Year End Tax Letter](#)

Video: [Write Letter – Edit Letter after Mail Merge](#)

Video: [Getting Started 107 – Writing Contribution Thank You Letters](#)

Video: [Thank A Person Once For Multiple Contributions](#)

Video: [Search – Contribution AndOR \(donated in 1 time period but not another\)](#)

3rd Party Tool: [QuickBooks](#)

3rd Party Article: [How to Record Journal Entries in QuickBooks](#)

Trail Blazer Live Support

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

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

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