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## **Overview**

This article walks through the steps to find **recurring \*donation\*** records in the **Contributions List**, and how to build a **monthly donation report** using the <u>format</u> and **pivot** tools to show what donors have given **month-by-month**.

As of the time this article was written there are two <u>merchant gateways</u> that you can use with **Trail Blazer** that support **recurring credit card** donations, they're **Authorize.Net** and **Vanco Services**.

Example monthly recurring donation report:



### Monthly donor report. You can now export/print or chart the report.

	Sort	🗊 Wrap 🛛	Export 3	📚 Print 🛛 🥅	Chart													
Cor	ntributi	on Amount I	by Donor	ID/First Name/L	.ast Name by	Contribution	Year Month											
		First Name	Last Name	SUM (Amount)	SUM (Amount)	SUM (Amount) 2016/08	SUM (Amount) 2016/09	SUM (Amount) 2016/10	SUM (Amount) 2016/11	SUM (Amount) 2016/12	SUM (Amount) 2017/01	SUM (Amount) 2017/02	SUM (Amount) 2017/03	SUM (Amount) 2017/04	SUM (Amount) 2017/05	SUM (Amount) 2017/06	SUM (Amount) 2017/07	SUM (Amount) 2017/08
►		Rock &	Brown	400.00	.00	.00	.00	.00	.00	250.00	.00	.00	.00	.00	.00	50.00	50.00	50.00
		Bread of		3,850.00	.00	.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	.00
	<b>V</b>	Central		1,800.00	.00	150.00	150.00	150.00	150.00	300.00	.00	150.00	150.00	150.00	150.00	150.00	150.00	.00
		Crossro		800.00	.00	100.00	100.00	100.00	.00	200.00	.00	300.00	.00	.00	.00	.00	.00	.00
	V	Emmaus		1,200.00	.00	100.00	100.00	100.00	100.00	200.00	.00	100.00	100.00	100.00	100.00	100.00	100.00	.00
11		First Ba		1,500.00	.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	.00
	V	Living G		4,400.00	.00	.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	400.00	.00
		Melaleuca		111.35	.00	10.90	9.75	11.05	.00	20.55	7.57	8.81	10.20	6.83	9.85	6.04	9.80	.00
	V	Meridia		2,130.00	.00	180.00	180.00	180.00	180.00	360.00	150.00	150.00	.00	150.00	150.00	150.00	300.00	.00
	<b>V</b>	Meridia		2,135.00	.00	150.00	230.00	110.00	120.00	800.00	.00	100.00	100.00	150.00	125.00	125.00	125.00	.00
		Riversid		600.00	.00	.00	50.00	50.00	50.00	100.00	50.00	.00	100.00	50.00	50.00	50.00	50.00	.00
		Sterry M		700.00	.00	50.00	150.00	50.00	50.00	100.00	.00	50.00	50.00	50.00	50.00	50.00	50.00	.00
		The Purs		1,200.00	.00	100.00	100.00	100.00	100.00	100.00	.00	200.00	100.00	100.00	100.00	100.00	100.00	.00
		Boyce &	Bailey	9,000.00	.00	750.00	750.00	750.00	750.00	750.00	750.00	750.00	750.00	750.00	750.00	750.00	750.00	.00
		Ronald	Bird	300.00	.00	25.00	.00	25.00	25.00	50.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	.00
		William	Boehm	360.00	.00	30.00	30.00	30.00	30.00	30.00	30.00	30.00	30.00	30.00	30.00	30.00	30.00	.00
		Vance	Brown	1,717.50	.00	101.50	296.00	229.00	176.00	139.00	184.00	111.00	111.00	111.00	37.00	111.00	111.00	.00
		Curt & K	Clark	900.00	.00	.00	.00	.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	.00
		David &	Cook	550.00	.00	50.00	.00	100.00	.00	50.00	100.00	.00	100.00	50.00	50.00	50.00	.00	.00
		Charles	Coon	275.00	.00	.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	.00
		Bob & L	Deakins	175.00	.00	.00	25.00	25.00	25.00	50.00	.00	25.00	25.00	.00	.00	.00	.00	.00
		Greg &	Dismu	900.00	.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	.00	.00	.00	.00
		Jessie &	Eddy	550.00	.00	.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00	00.
		Marcy	Emery	300.00	.00	.00	50.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	00.
		Joan	Emry	1,100.00	.00	.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	.00
		Gary &	Fisher	500.00	.00	.00	25.00	50.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	00.
		James	Freem	2 275 00	.00	175.00	175.00	175.00	175.00	75.00	/5.00	/5.00	/5.00	/5.00	.00	.00	.00	.00
		Christop	Cillam	2,275.00	.00	1/5.00	1/5.00	1/5.00	1/5.00	350.00	1/5.00	1/5.00	1/5.00	1/5.00	1/5.00	1/5.00	1/5.00	00.
		Lloyd &	Gillam	490.00	.00	40.00	.00	40.00	40.00	50.00	40.00	40.00	40.00	40.00	40.00	40.00	25.00	.00
		Michael	Grant	220.00	.00	25.00	20.00	25.00	25.00	40.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	.00
			Hartro	220.00	.00	20.00	20.00	20.00	20.00	40.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	.00
		Tom & Ion	Hickey	1 200 00	.00	100.00	100.00	100.00	100.00	20.00	20.00	100.00	100.00	100.00	100.00	100.00	100.00	.00
		Brent &	Ho	900.00	.00	75.00	75.00	50.00	150.00	200.00	75.00	50.00	50.00	50.00	50.00	100.00	125.00	.00
		Rod & R	lensen	3 600.00	.00	300.00	300.00	300.00	300.00	300.00	300.00	300.00	300.00	300.00	300.00	300.00	300.00	.00
		Kent & K	Kalpak	350.00	.00	25.00	50.00	25.00	25.00	25.00	25.00	25.00	50.00	25.00	00.00	50.00	25.00	.00
		Bob & K	Kuche	600.00	.00	50.00	50.00	50.00	00	100.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00	
		Julian &	Laca	480.00	.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	.00
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**Tip:** <u>this article</u> provides a variety of useful **SQL queries** you can utilize to filter your data. *Most of the examples in this SQL tutorial are requests* that customers have had over the years, which require using the SQL tab.

## Steps

Open the **Contributions** list.







Under the **General** tab click the **Recurrence** drop-down, select **Monthly & Monthly / Sustaining**, click **[OK]**, and then click **[Search]** to populate the list with all the recurring monthly donations in your database. *In this example there were 222 monthly recurring monthly donations*.

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**Tip:** you can filter this report further by things like date-range if necessary:



# You can filter the monthly donor report further by date-range.

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After generating the list of recurring donations, click the [Format] drop-down and select Columns...



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Make sure that these columns are selected, and then click [OK]:

- First Name
- Last Name
- ContributionYearMonth
- DonorID (not show, but included by default)
- Amount



### 1. Make sure that these columns are included for the report:

- First Name
- Last Name
- Donor ID
- ContributionYearMonth
- Amount





After the columns listed above are added to the grid, click the **Pivot** button.



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Under the Row Label tab select Donor ID, First Name, and Last Name.

Create Pivot Table 8 Row Labels Column Labels Data 1 ID Pivot Table Rows ۰ Date Column Heading Donor ID > Last Name Donor.DonorId Donor ID P Select Donor ID, First Name Donor.FirstName First Name E MI Last Name, and ⊾ Donor.LastName Last Name Amount Open Pledges [Per Donor] First Name. Street Street 2 City State Zip Code Overall Progress Waiting for user input... Step Progress OK Cancel



Under the Column Labels tab select Contribution Year Month.





Under the **Data** tab select **Amount**, and then click **[OK]** to generate the **pivot report**.



1

Row Labels Column Labels Data		
Show count of occurrences	Pivot Table Data	
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The report will display your recurring monthly **\*donors\*** with the **total amount** they've donated each **month**. *My finished example is below (only the first 15 months display in the screenshots as my report goes all the back to 2012 when my monthly recurring donations started).* 

#### **Export / Print**

### Example final report of all monthly donors with donation amounts month-by-month.

_	_	_	<b>* `</b>	_			_					_	_	_	_	_		_	_	_
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Cor	ntribut	tion Amou	int by Donor ID	)/First Name/La	ast Name by (	Contribution	Year Month													
	<b>V</b>	Donor ID	First Name	Last Name	SUM (Amount)	SUM (Amount) 2014/06	SUM (Amount) 2014/07	SUM (Amount) 2014/08	SUM (Amount) 2014/09	SUM (Amount) 2014/10	SUM (Amount) 2014/11	SUM (Amount) 2014/12	SUM (Amount) 2015/01	SUM (Amount) 2015/02	SUM (Amount) 2015/03	SUM (Amount) 2015/04	SUM (Amount) 2015/05	SUM (Amount) 2015/06	SUM (Amount) 2015/07	SUM (Amount) 2015/08
►		3	Rock & Terry	Brown	150.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
		173	Curt & Ken	Clark	900.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	100.00
	V	238	Thomas & D	Dougherty	1,100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	.00	100.00	100.00	100.00	.00	.00	.00
	V	287	Christopher	Fullmer	1,400.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
	V	485	Stacey	McCullough	765.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
	V	730	Tyler & Heat	Smith	1,800.00	50.00	50.00	50.00	50.00	50.00	.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00
	V	867	Ryan & Julie	Wilhite	75.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
		5789	Nick & Deni	Gaviola	200.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
	V	5805	Jim & Carolyn	McMonigal	300.00	.00	.00	.00	.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00
	V	6199	Dana & Cathi	Danzer	600.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	25.00	.00	50.00	.00	50.00	25.00
	V	7438	Joanne	Fondren	20.00	.00	.00	10.00	10.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
		7752	Gregory & S	Prosch	300.00	.00	.00	.00	.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00
	V	7789	Todd And A	Vitek	200.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
		7955	Robert	Barros-Bailey	1,000.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	125.00
	V	8090	Steven & M	George	100.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
	V	8215	Kerri	Demarse	250.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
	V	8323	Gene & Jac	Pease	750.00	.00	.00	.00	.00	.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00
		9772	Oregon Trail	Church Of	1,975.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
	V	9968	Kevin & Ser	Wang	150.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
	V	9971	David & Car	Lang	315.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
		9988	Hayden	Stout	25.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
	21				12,375.00	150.00	150.00	160.00	160.00	200.00	175.00	225.00	225.00	125.00	250.00	225.00	275.00	125.00	175.00	375.00

You can **export**, **print**, and **graph** the pivot report using the buttons on the top tool strip.



**Return back** to the **contribution list** you built in the **previous steps** in order to **save** both the <u>format</u> and the search <u>query</u> for future use.



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Donor Communications		<b>V</b>	238	Thomas	Doughe	1,100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	
		V	287	Christop	Fullmer	1,400.00	.00	.00	.00	.00	.00	.00	.00	
> 🍇 System Manager		V	485	Stacey	McCullo	765.00	.00	.00	.00	.00	.00	.00	.00	
		V	730	Tyler & H	Smith	1,800.00	50.00	50.00	50.00	50.00	50.00	.00	50.00	
		V	867	Ryan & J	Wilhite	75.00	.00	.00	.00	.00	.00	.00	.00	
		V	5789	Nick & D	Gaviola	200.00	.00	.00	.00	.00	.00	.00	.00	
		<b>V</b>	5805	Jim & Car	McMoni	300.00	.00	.00	.00	.00	25.00	25.00	25.00	
		<b>V</b>	6199	Dana & C	Danzer	600.00	.00	.00	.00	.00	.00	.00	.00	
		V	7438	Joanne	Fondren	20.00	.00	.00	10.00	10.00	.00	.00	.00	
		V	7752	Gregory	Prosch	300.00	.00	.00	.00	.00	25.00	25.00	25.00	
		<b>V</b>	7789	Todd And	Vitek	200.00	.00	.00	.00	.00	.00	.00	.00	
		<b>V</b>	7955	Robert	Barros	1,000.00	.00	.00	.00	.00	.00	.00	.00	
	1	<b>V</b>	8090	Steven &	George	100.00	.00	.00	.00	.00	.00	.00	.00	
			8215	Kerri	Demarse	250.00	.00	.00	.00	.00	.00	.00	.00	
			8323	Gene & J	Pease	750.00	.00	.00	.00	.00	.00	25.00	25.00	
			9772	Oregon T	Church	1,975.00	.00	.00	.00	.00	.00	.00	.00	
			9968	Kevin & S	Wang	150.00	.00	.00	.00	.00	.00	.00	.00	
			9971	David &	Lang	315.00	.00	.00	.00	.00	.00	.00	.00	_
			9988	Hayden	Stout	25.00	.00	.00	.00	.00	.00	.00	.00	
			10037	Tony & Br	Ball	50.00	.00	.00	.00	.00	.00	.00	.00	
Contribution Amount by D	Σ	22				12,425.00	150.00	150.00	160.00	160.00	200.00	175.00	225.00	

Either click [Cancel] or click on the Contributions list on the left under Open Windows to return back to the query you built for recurring monthly donations.



Cancel



To save the **search query** as a **favorite**, expand the **Advanced Functions** tool strip, and click **blue** the **[Save]** button.



2. Save the monthly	recurring	donation
query as a favorite.		

nducts:
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Create a descriptive name, and then click [Save]. My example is below which I called "Recurring Monthly Donations".



# **1. Create a descriptive name for the query.**

Save Search Criteria as a "Favorite"      Name: Recurring Monthly Donations	-		
Protect Private			
Saved Search Name	Created	Owned By User	Sci
Recurring donors (calculated) for past 365 days	2017/05/02	Admin, Admin	
Boradic Donors (less than 5 times in past 5 rolling years)	2017/05/04	Admin, Admin	
<			•
Uetalis		2 Save 🮯	Cancel

You can **reload** the saved search in the future under the **Favorites** tab.





To save the format click the [Format] drop-down > Save As...



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Give the format a descriptive name and click [Save]. In this example I called it "Ready for Pivot".



You can **reload** the format in the future by clicking the **[Format]** drop-down > **Select Saved...** 



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





- YouTube Channel

- Knowledge Base Articles

- 3rd Party Resources

## **Related Resources**

Article: <u>Advanced Queries – the SQL Tab</u>
Article: <u>SQL Wildcards</u>
Article: <u>Creating and Saving Default Formats for Reporting with the Grid</u>
Article: <u>Search Query – New Donors This Month, and This Year (Primarily for Nonprofits)</u>



Article: How to Create a Donor LYBUNT Search Query (Donors Who Gave Last Year But Unfortunately Not This Year) and How to Save and Load it as a Search Favorite
Article: Building a Search Query for 'First Time Donors' THIS Year – Save and Load it as a Favorite & Add it to your Dashboard
Article: Save and Load a Search Query as a (Dynamic) Search Favorite
Article: How to Delete or Rename a Search Favorite (Query)
Article: What Donors Have Increased Giving Over Last Year
Article: How to Use the New Dashboard Features – Adding Graphs and Metrics with Drag-and-Drop
Video: Reporting 105 – Pivots – summary reporting
Video: Getting Starting 105 – Queries with an AND condition
Video: Getting Started 104 Queries with wildcards
Video: Favorites Deleting Saved Queries
Video: Getting Started 102 Beginning Queries - Nonprofit
Video: Reporting 104 – Joined tables

Video: <u>Search – Contribution AndOR (donated in 1 time period but not another)</u>

## **Trail Blazer Live Support**

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- Email: <a href="mailto:support@trailblz.com">support@trailblz.com</a>
- **Facebook:** <u>https://www.facebook.com/pages/Trail-Blazer-Software/64872951180</u>
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\* As a policy we require that you have taken our intro training class before calling or emailing our live support team.

<u>*Click here*</u> 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 <u>GoToMeeting</u> session where we host our live interactive trainings.

\* This service *is* included in your contract.