

Author: Kristenson, Joel
Last Updated: 2017-08-23

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 [format](#) and **pivot** tools to show what donors have given **month-by-month**.

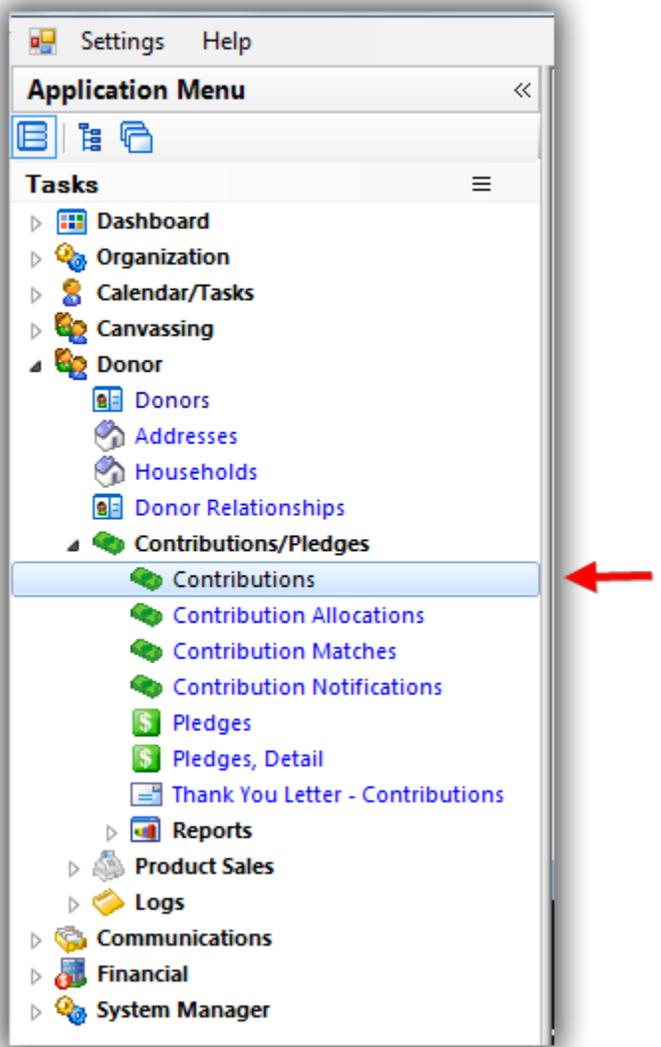
*As of the time this article was written there are two [merchant gateways](#) that you can use with **Trail Blazer** that support **recurring credit card donations**, they're **Authorize.Net** and **Vanco Services**.*

Example **monthly recurring donation** report:

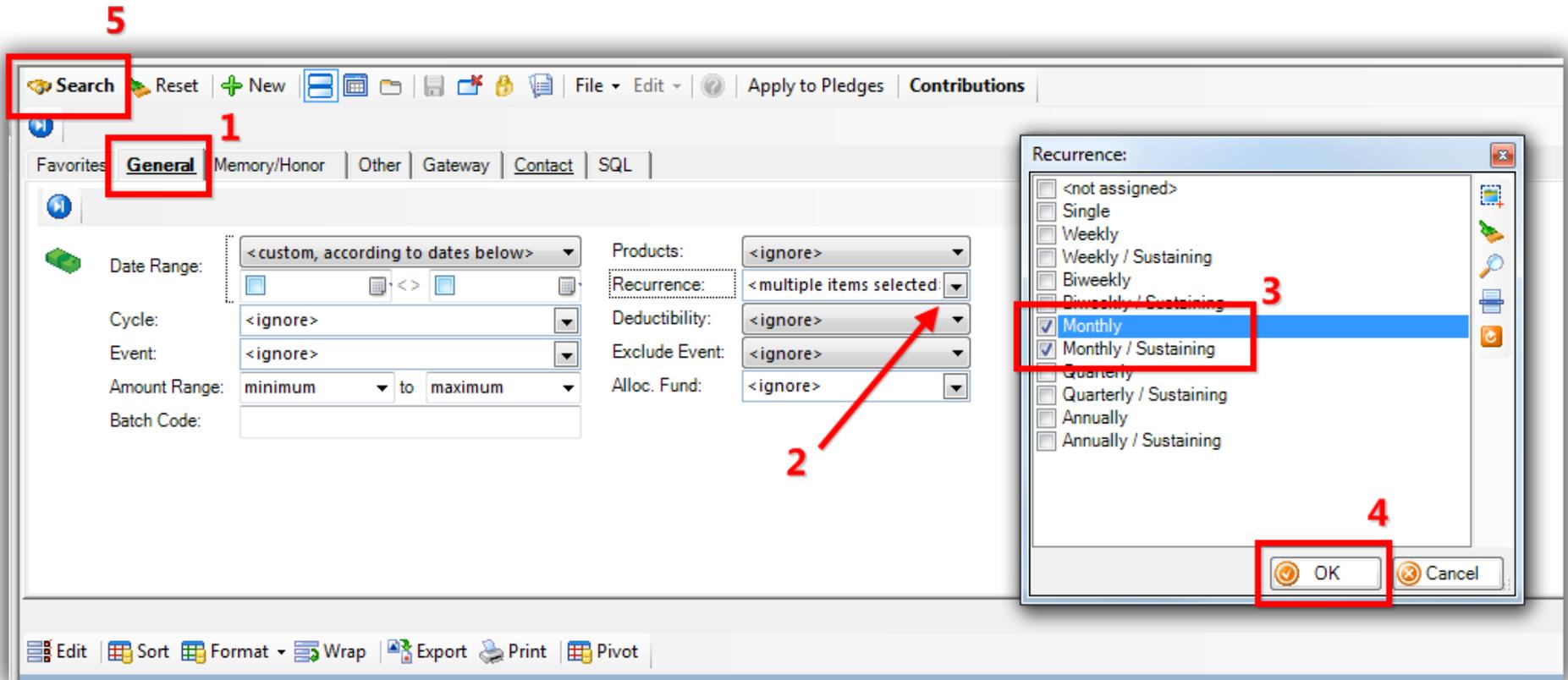
 **Tip:** [this article](#) provides a variety of useful **SQL queries** you can utilize to filter your data. *Most of the examples in this SQL tutorial are requests that customers have had over the years, which require using the SQL tab.*

Steps

Open the **Contributions** list.

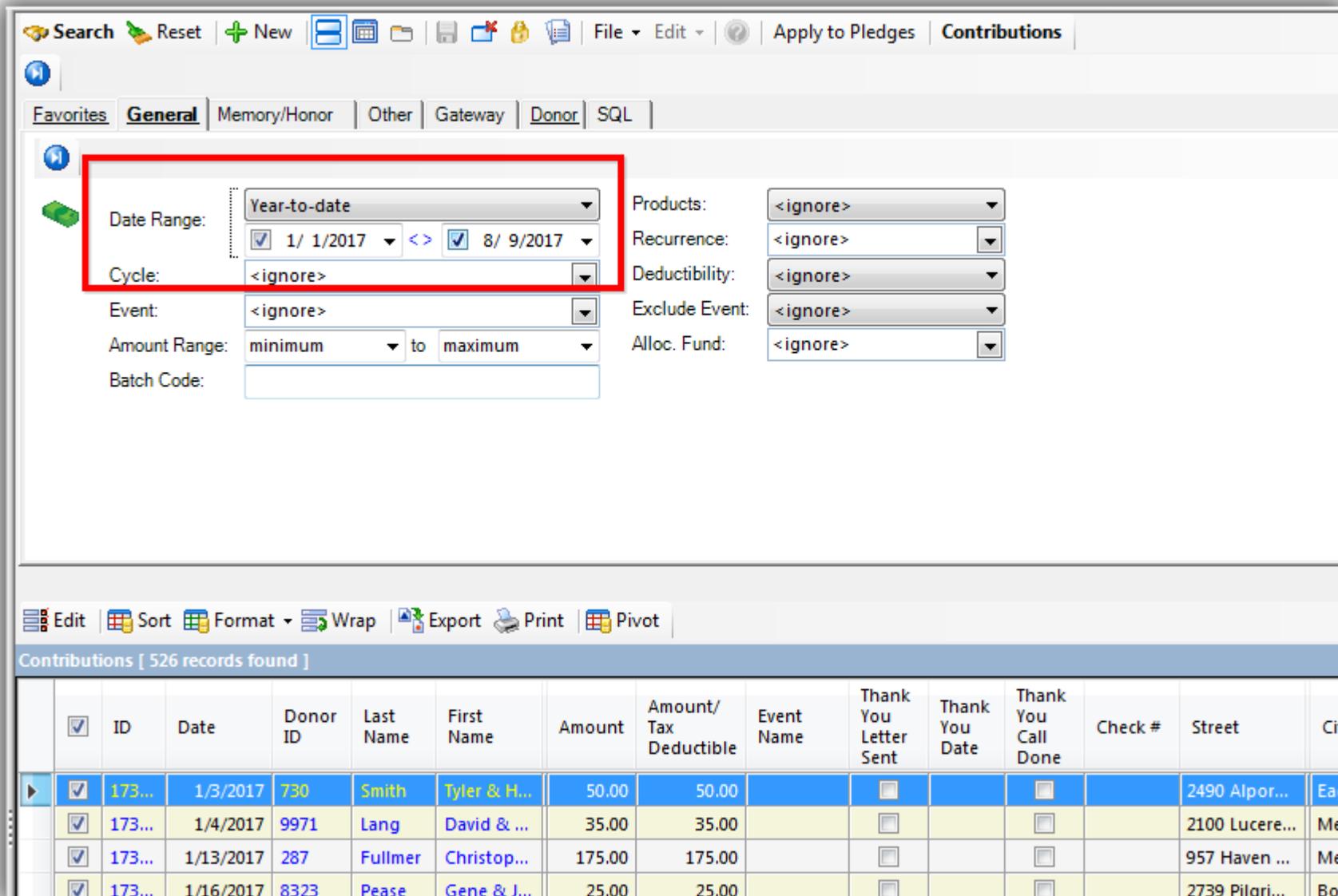


Under the **General** tab click the **Recurrence** drop-down, select **Monthly & Monthly / Sustaining**, click **[OK]**, and then click **[Search]** to populate the list with all the recurring monthly donations in your database. *In this example there were 222 monthly recurring monthly donations.*



 **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.



The screenshot shows the 'Contributions' report filter interface. The 'Date Range' section is highlighted with a red box, indicating the selected filters: 'Year-to-date' for the date range, with start and end dates set to 1/1/2017 and 8/9/2017. Other filter options include Cycle, Event, Amount Range, Batch Code, Products, Recurrence, Deductibility, Exclude Event, and Alloc. Fund.

Contributions [526 records found]

	<input checked="" type="checkbox"/>	ID	Date	Donor ID	Last Name	First Name	Amount	Amount/ Tax Deductible	Event Name	Thank You Letter Sent	Thank You Date	Thank You Call Done	Check #	Street	Cit
	<input checked="" type="checkbox"/>	173...	1/3/2017	730	Smith	Tyler & H...	50.00	50.00		<input type="checkbox"/>		<input type="checkbox"/>		2490 Alpor...	Ea
	<input checked="" type="checkbox"/>	173...	1/4/2017	9971	Lang	David & ...	35.00	35.00		<input type="checkbox"/>		<input type="checkbox"/>		2100 Lucere...	Me
	<input checked="" type="checkbox"/>	173...	1/13/2017	287	Fullmer	Christop...	175.00	175.00		<input type="checkbox"/>		<input type="checkbox"/>		957 Haven ...	Me
	<input checked="" type="checkbox"/>	173...	1/16/2017	8323	Pease	Gene & J...	25.00	25.00		<input type="checkbox"/>		<input type="checkbox"/>		2739 Pilqri...	Boi

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

Search Reset New [Icons] File Edit Apply to Pledges Contributions

Favorites General Memory/Honor Other Gateway Donor SQL

Date Range: <custom, according to dates below> Products: <ignore>
 Cycle: <ignore> Recurrence: <multiple items selected>
 Event: <ignore> Deductibility: <ignore>
 Amount Range: minimum to maximum Exclude Event: <ignore>
 Batch Code: Alloc. Fund: <ignore>

Edit Sort Format Wrap Export Print Pivot

Contributions [222] <System Format>

Columns...
 Select saved...
 Save
 Save As...
 Assign as default...

Add or remove columns, apply formatting, or specify column attributes.

ID	Amount	Payment Method	Recurrence Type	Street	City	State	Zip Code
11...	50.00	Credit Card	Monthly	2490 Alp...	Eagle	ID	83616
11...	100.00	Credit Card	Monthly	2125 S P...	Boise	ID	83709
11...	50.00	Credit Card	Monthly	2490 Alp...	Eagle	ID	83616
11...	100.00	Credit Card	Monthly	2125 S P...	Boise	ID	83709
11...	10.00	Credit Card	Monthly	1806 SA...	Caldwell	ID	836054...
12...	100.00	Credit Card	Monthly	2125 S P...	Boise	ID	83709
12...	50.00	Credit Card	Monthly	2490 Alp...	Eagle	ID	83616
12...	10.00	Credit Card	Monthly	1806 SA...	Caldwell	ID	836054...
12...	100.00	Credit Card	Monthly	2125 S P...	Boise	ID	83709
12...	50.00	Credit Card	Monthly	2490 Alp...	Eagle	ID	83616
12...	25.00	Credit Card	Monthly	1085 Sta...	Meridian	ID	83642
12...	25.00	Credit Card	Monthly	1868 Ru...	Boise	ID	83709
12...	25.00	Credit Card	Monthly	2739 Pil...	Boise	ID	83704
12...	100.00	Credit Card	Monthly	2125 S P...	Boise	ID	83709
12...	25.00	Credit Card	Monthly	1085 Sta...	Meridian	ID	83642
12...	25.00	Credit Card	Monthly	1868 Ru...	Boise	ID	83709
12...	50.00	Credit Card	Monthly	2490 Alp...	Eagle	ID	83616
12...	25.00	Credit Card	Monthly	2739 Pil...	Boise	ID	83704
12...	100.00	Credit Card	Monthly	2125 S P...	Boise	ID	83709
12...	25.00	Credit Card	Monthly	1085 Sta...	Meridian	ID	83642
12...	25.00	Credit Card	Monthly	1868 Ru...	Boise	ID	83709

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**

(Not shown but also included is First Name, Last Name, and Donor ID.)

2

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

Search Reset New [Icons] File Edit Apply to Pledges Contributions

Favorites **General** Memory/Honor Other Gateway Donor SQL

Date Range: <custom, according to dates below> Products: <ignore>
 Cycle: <ignore> Recurrence: <multiple items selected>
 Event: <ignore> Deductibility: <ignore>
 Amount Range: minimum to maximum Exclude Event: <ignore>
 Batch Code: Alloc. Fund: <ignore>

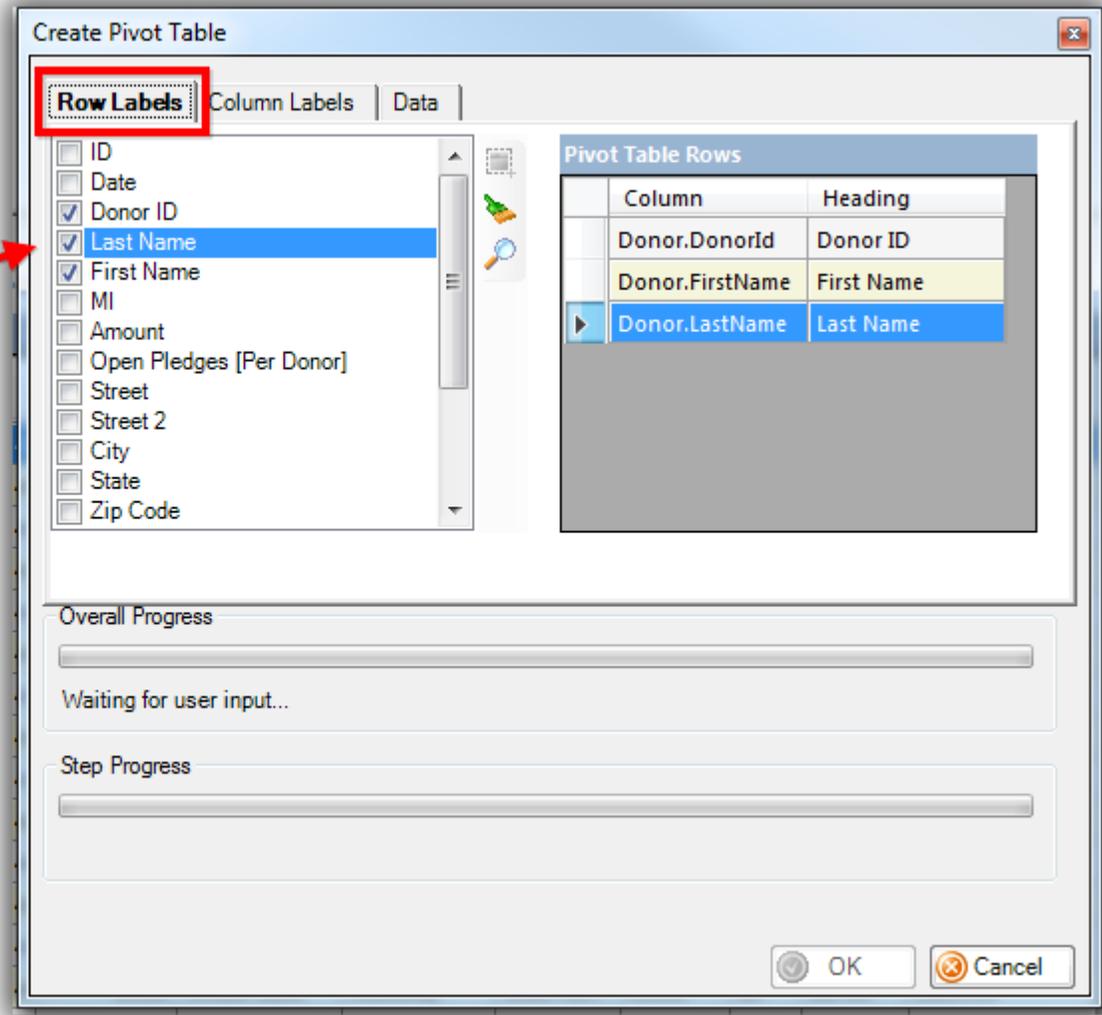
Edit Sort Format Wrap Export Print **Pivot**

Contributions [222 records found]

ID	Last Name	First Name	Date	Amount	Payment Method	Create pivot table type	Street	City	State	Zip Code	Contribution Year Month
11...	Dough...	Thomas...	6/10/2014	100.00	Credit Card	Monthly	2125 S P...	Boise	ID	83709	2014/06
11...	Smith	Tyler & ...	6/13/2014	50.00	Credit Card	Monthly	2490 Alp...	Eagle	ID	83616	2014/06
11...	Dough...	Thomas...	7/11/2014	100.00	Credit Card	Monthly	2125 S P...	Boise	ID	83709	2014/07
11...	Smith	Tyler & ...	7/14/2014	50.00	Credit Card	Monthly	2490 Alp...	Eagle	ID	83616	2014/07
11...	Dough...	Thomas...	8/11/2014	100.00	Credit Card	Monthly	2125 S P...	Boise	ID	83709	2014/08
11...	Smith	Tyler & ...	8/14/2014	50.00	Credit Card	Monthly	2490 Alp...	Eagle	ID	83616	2014/08
12...	Fondren	Joanne	8/28/2014	10.00	Credit Card	Monthly	1806 SA...	Caldwell	ID	836054...	2014/08
12...	Dough...	Thomas...	9/11/2014	100.00	Credit Card	Monthly	2125 S P...	Boise	ID	83709	2014/09
12...	Smith	Tyler & ...	9/14/2014	50.00	Credit Card	Monthly	2490 Alp...	Eagle	ID	83616	2014/09
12...	Fondren	Joanne	9/29/2014	10.00	Credit Card	Monthly	1806 SA...	Caldwell	ID	836054...	2014/09
12...	Dough...	Thomas...	10/11/2014	100.00	Credit Card	Monthly	2125 S P...	Boise	ID	83709	2014/10
12...	Smith	Tyler & ...	10/14/2014	50.00	Credit Card	Monthly	2490 Alp...	Eagle	ID	83616	2014/10
12...	McMo...	Jim & C...	10/23/2014	25.00	Credit Card	Monthly	1085 Sta...	Meridian	ID	83642	2014/10
12...	Prosch	Gregor...	10/27/2014	25.00	Credit Card	Monthly	1868 Ru...	Boise	ID	83709	2014/10
12...	Pease	Gene & ...	11/7/2014	25.00	Credit Card	Monthly	2739 Pil...	Boise	ID	83704	2014/11
12...	Dough...	Thomas...	11/11/2014	100.00	Credit Card	Monthly	2125 S P...	Boise	ID	83709	2014/11
12...	McMo...	Jim & C...	11/24/2014	25.00	Credit Card	Monthly	1085 Sta...	Meridian	ID	83642	2014/11
12...	Prosch	Gregor...	11/28/2014	25.00	Credit Card	Monthly	1868 Ru...	Boise	ID	83709	2014/11
12...	Smith	Tyler & ...	12/2/2014	50.00	Credit Card	Monthly	2490 Alp...	Eagle	ID	83616	2014/12
12...	Pease	Gene & ...	12/8/2014	25.00	Credit Card	Monthly	2739 Pil...	Boise	ID	83704	2014/12
12...	Dough...	Thomas...	12/11/2014	100.00	Credit Card	Monthly	2125 S P...	Boise	ID	83709	2014/12
12...	McMo...	Jim & C...	12/24/2014	25.00	Credit Card	Monthly	1085 Sta...	Meridian	ID	83642	2014/12
12...	Prosch	Gregor...	12/28/2014	25.00	Credit Card	Monthly	1868 Ru...	Boise	ID	83709	2014/12

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

**Select Donor ID,
Last Name, and
First Name.**



Row Labels | Column Labels | Data

- ID
- Date
- Donor ID
- Last Name
- First Name
- MI
- Amount
- Open Pledges [Per Donor]
- Street
- Street 2
- City
- State
- Zip Code

Pivot Table Rows

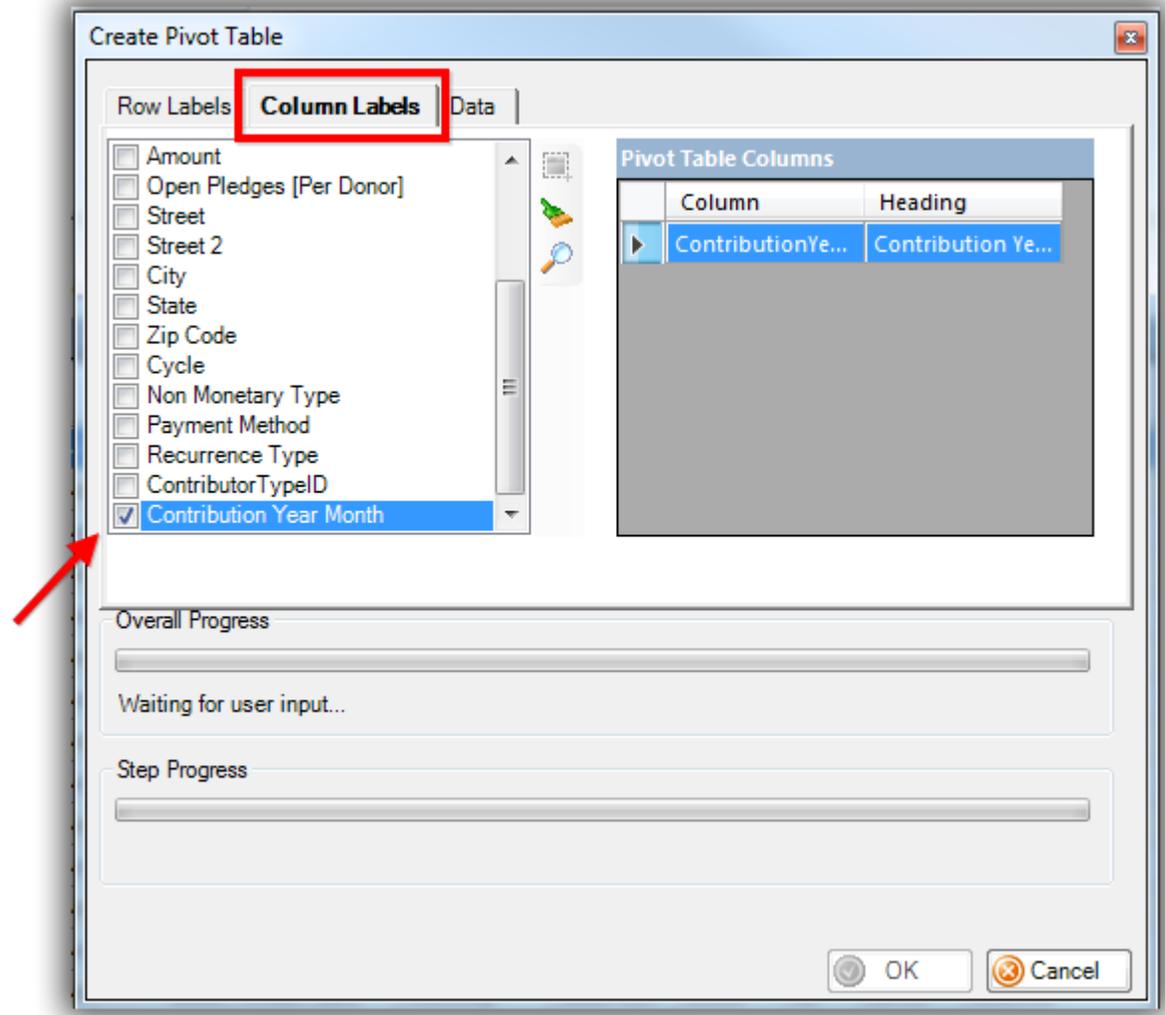
Column	Heading
Donor.DonorId	Donor ID
Donor.FirstName	First Name
Donor.LastName	Last Name

Overall Progress
Waiting for user input...

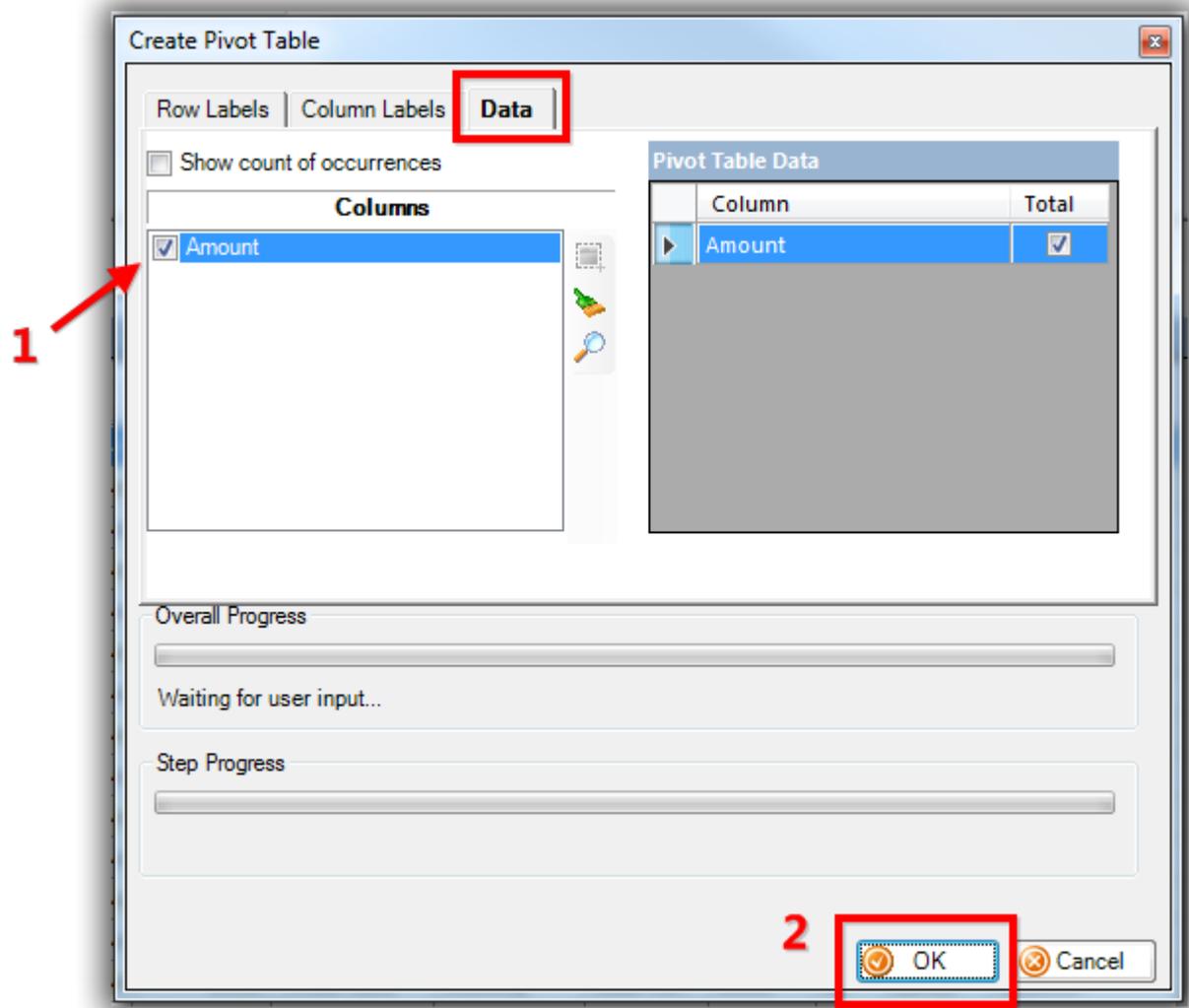
Step Progress

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**.



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.

Contribution Amount by Donor ID/First Name/Last Name by Contribution Year Month																			
	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
<input checked="" type="checkbox"/>	3	Rock & Terry	Brown	150.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
<input checked="" type="checkbox"/>	173	Curt & Ken...	Clark	900.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	100.00
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	287	Christopher...	Fullmer	1,400.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
<input checked="" type="checkbox"/>	485	Stacey	McCullough	765.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	867	Ryan & Julie	Wilhite	75.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
<input checked="" type="checkbox"/>	5789	Nick & Deni...	Gaviola	200.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	7438	Joanne	Fondren	20.00	.00	.00	10.00	10.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	7789	Todd And A...	Vitek	200.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
<input checked="" type="checkbox"/>	7955	Robert	Barros-Bailey	1,000.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	125.00
<input checked="" type="checkbox"/>	8090	Steven & M...	George	100.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
<input checked="" type="checkbox"/>	8215	Kerri	Demarse	250.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	9772	Oregon Trail	Church Of ...	1,975.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
<input checked="" type="checkbox"/>	9968	Kevin & Ser...	Wang	150.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
<input checked="" type="checkbox"/>	9971	David & Car...	Lang	315.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
<input checked="" type="checkbox"/>	9988	Hayden	Stout	25.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
<input checked="" type="checkbox"/>	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 [format](#) and the search [query](#) for future use.

Settings Help
Sort Wrap Export Print Chart

Application Menu

- Tasks
 - Dashboard
 - Organization
 - Calendar/Tasks
 - Canvassing
 - Donor
 - Communications
 - Financial
 - System Manager

Open Windows

- Start Page
- Contributions
- Contribution Amount by D...

Contribution Amount by Donor ID/First Name/Last Name by Contribution Year Month

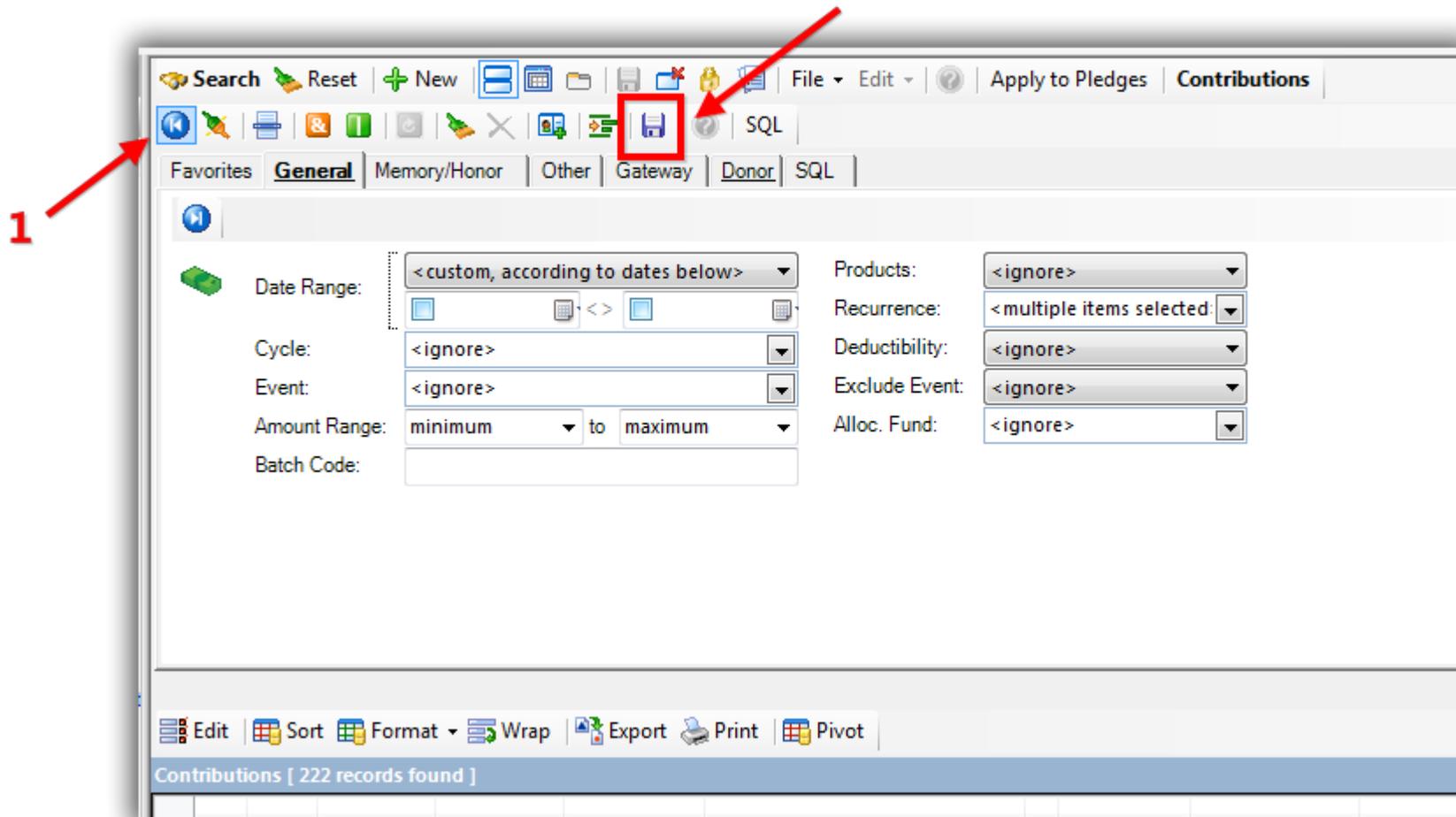
Donor ID	First Name	Last Name	SUM (Amount)	SUM (Amount) 2014/06	SUM (Amount) 2014/07	SUM (Amount) 2014/08	SUM (Amount) 2014/09	SUM (Amount) 2014/10	SUM (Amount) 2014/11	SUM (Amount) 2014/12	SUM (Amount) 2015/01
3	Rock & T...	Brown	150.00	.00	.00	.00	.00	.00	.00	.00	.00
173	Curt & Ke...	Clark	900.00	.00	.00	.00	.00	.00	.00	.00	.00
238	Thomas ...	Doughe...	1,100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00
287	Christop...	Fullmer	1,400.00	.00	.00	.00	.00	.00	.00	.00	.00
485	Stacey	McCullo...	765.00	.00	.00	.00	.00	.00	.00	.00	.00
730	Tyler & H...	Smith	1,800.00	50.00	50.00	50.00	50.00	50.00	.00	50.00	.00
867	Ryan & J...	Wilhite	75.00	.00	.00	.00	.00	.00	.00	.00	.00
5789	Nick & D...	Gaviola	200.00	.00	.00	.00	.00	.00	.00	.00	.00
5805	Jim & Car...	McMoni...	300.00	.00	.00	.00	.00	25.00	25.00	25.00	.00
6199	Dana & C...	Danzer	600.00	.00	.00	.00	.00	.00	.00	.00	.00
7438	Joanne	Fondren	20.00	.00	.00	10.00	10.00	.00	.00	.00	.00
7752	Gregory ...	Prosch	300.00	.00	.00	.00	.00	25.00	25.00	25.00	.00
7789	Todd And...	Vitek	200.00	.00	.00	.00	.00	.00	.00	.00	.00
7955	Robert	Barros-...	1,000.00	.00	.00	.00	.00	.00	.00	.00	.00
8090	Steven & ...	George	100.00	.00	.00	.00	.00	.00	.00	.00	.00
8215	Kerri	Demarse	250.00	.00	.00	.00	.00	.00	.00	.00	.00
8323	Gene & J...	Pease	750.00	.00	.00	.00	.00	.00	.00	25.00	25.00
9772	Oregon T...	Church ...	1,975.00	.00	.00	.00	.00	.00	.00	.00	.00
9968	Kevin & S...	Wang	150.00	.00	.00	.00	.00	.00	.00	.00	.00
9971	David & ...	Lang	315.00	.00	.00	.00	.00	.00	.00	.00	.00
9988	Hayden	Stout	25.00	.00	.00	.00	.00	.00	.00	.00	.00
10037	Tony & Br...	Ball	50.00	.00	.00	.00	.00	.00	.00	.00	.00
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.

OK Cancel

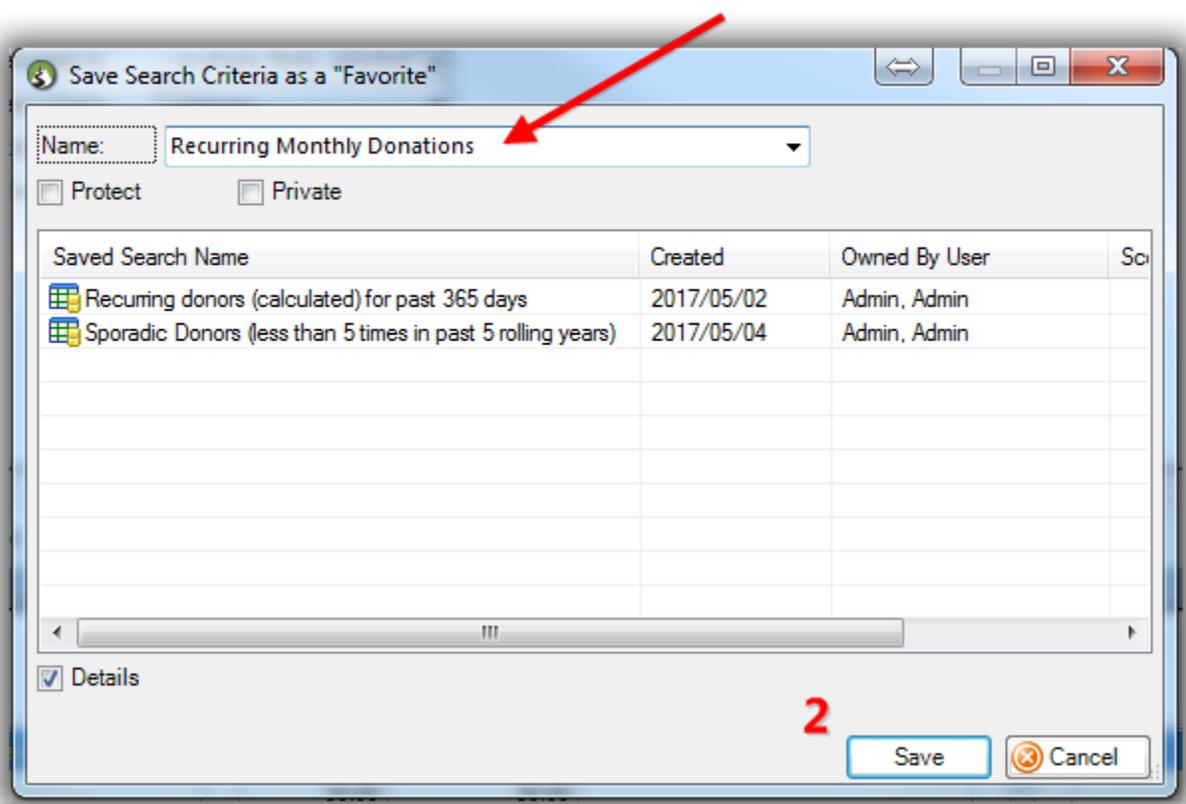
To save the **search query** as a **favorite**, expand the **Advanced Functions** tool strip, and click **blue** the **[Save]** button.

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



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.



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

The screenshot shows the TrailBlazer application interface. On the left is a navigation pane with a tree view under 'Tasks' including 'Donor' and 'Contributions/Pledges'. The main window has a 'Favorites' tab selected, which contains a 'Favorite Searches' list:

- Recurring donors (calculated) for past 365 days
- Recurring Monthly Donations
- Sporadic Donors (less than 5 times in past 5 rolling years)

A red arrow points to the 'Recurring Monthly Donations' query. A red text box overlaid on the image states: **You can reload the saved query in the future under the Favorites tab.**

Below the list is a toolbar with 'Edit', 'Sort', 'Format', 'Wrap', 'Export', 'Print', and 'Pivot' options. The main data area shows a table header for 'Contributions [0 records found]' with columns: ID, Date, Donor ID, Last Name, First Name, M, Amount, Amount/ Tax Deductible, and Event. The table body contains a single row with a sum symbol in the first column and values 0, .00, and .00 in the last three columns.

To save the [format](#) click the **[Format]** drop-down > **Save As...**

Search | Reset | New | File | Edit | Apply to Pledges | **Contributions**

Favorites | **General** | Memory/Honor | Other | Gateway | Donor | SQL

Date Range: < custom, according to dates below > | Products: < ignore >
 Cycle: < ignore > | Recurrence: < multiple items selected >
 Event: < ignore > | Deductibility: < ignore >
 Amount Range: minimum to maximum | Exclude Event: < ignore >
 Batch Code: | Alloc. Fund: < ignore >

1

Edit | Sort | Format | Wrap | Export | Print | Pivot

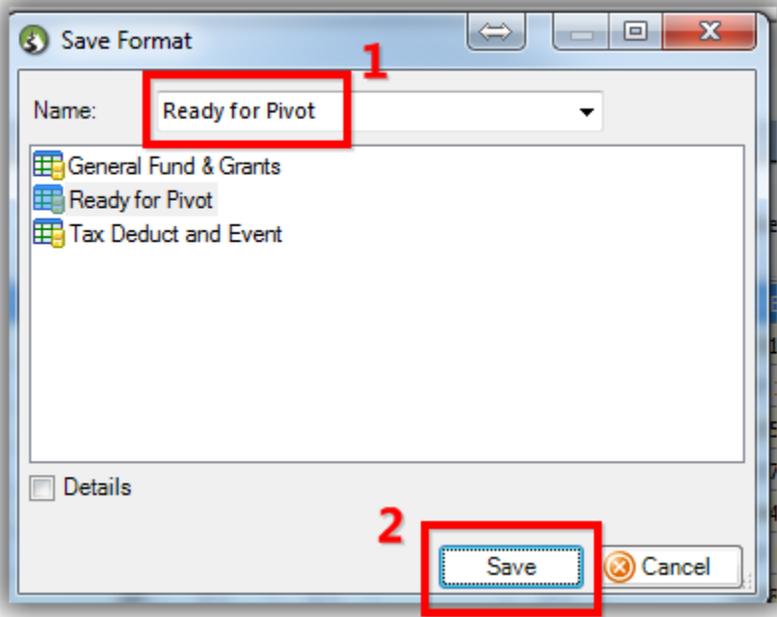
Contributions [222]

<System Format>
 Columns...
 Select saved...
 Save
 Save As...
 Assign as default...
 Save the current format under a specified name

2

ID	Last Name	First Name	Date	Amount	Payment Method	Recurrence Type	Street	City	State	Zip Code	Contribution Year Month
11...	Dough...	Thomas...	8/11/2014	100.00	Credit Card	Monthly	2125 S P...	Boise	ID	83709	2014/06
11...	Smith	Tyler & ...	8/14/2014	50.00	Credit Card	Monthly	2490 Alp...	Eagle	ID	83616	2014/06
11...	Fondren	Joanne	8/28/2014	100.00	Credit Card	Monthly	2125 S P...	Boise	ID	83709	2014/07
11...	Dough...	Thomas...	9/11/2014	50.00	Credit Card	Monthly	2490 Alp...	Eagle	ID	83616	2014/07
11...	Smith	Tyler & ...	9/14/2014	50.00	Credit Card	Monthly	2490 Alp...	Eagle	ID	83616	2014/08
12...	Fondren	Joanne	8/28/2014	10.00	Credit Card	Monthly	1806 SA...	Caldwell	ID	836054...	2014/08
12...	Dough...	Thomas...	9/11/2014	100.00	Credit Card	Monthly	2125 S P...	Boise	ID	83709	2014/09
12...	Smith	Tyler & ...	9/14/2014	50.00	Credit Card	Monthly	2490 Alp...	Eagle	ID	83616	2014/09

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...**

Search Reset + New [Icons] File Edit ? Apply to Pledges Contributions

Favorites **General** Memory/Honor Other Gateway Donor SQL

Date Range: <custom, according to dates below> Products: <ignore>
 Cycle: <ignore> Recurrence: <multiple items selected>
 Event: <ignore> Deductibility: <ignore>
 Amount Range: minimum to maximum Exclude Event: <ignore>
 Batch Code: Alloc. Fund: <ignore>

Edit Sort Format Wrap Export Print Pivot

Contributions [223]

<System Format>

Columns

Select saved... (highlighted with red box and number 2)

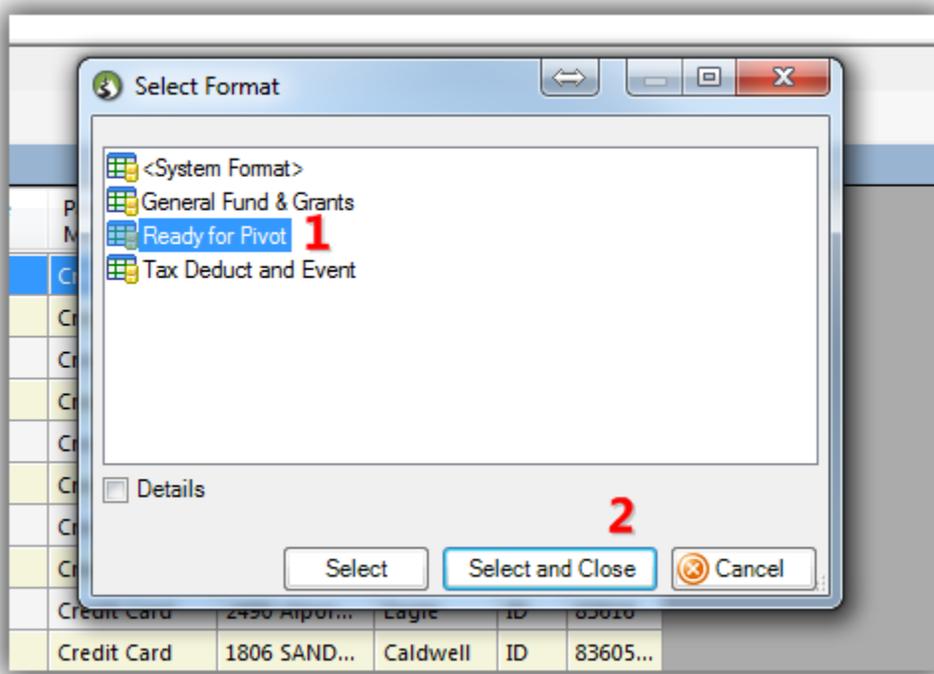
Save

Save As...

Assign as default...

ID	Amount	Contribution Year Month	Recurrence Type	Payment Method	Street	City	State	Zip Code
117...	100.00	2014/06	Monthly	Credit Card	2125 S Petr...	Boise	ID	83709
117...	50.00	2014/06	Monthly	Credit Card	2490 Alpor...	Eagle	ID	83616
118...	100.00	2014/07	Monthly	Credit Card	2125 S Petr...	Boise	ID	83709
118...	50.00	2014/07	Monthly	Credit Card	2490 Alpor...	Eagle	ID	83616
119...	100.00	2014/08	Monthly	Credit Card	2125 S Petr...	Boise	ID	83709
119...	50.00	2014/08	Monthly	Credit Card	2490 Alpor...	Eagle	ID	83616
120...	10.00	2014/08	Monthly	Credit Card	1806 SAND...	Caldwell	ID	83605...
120...	100.00	2014/09	Monthly	Credit Card	2125 S Petr...	Boise	ID	83709
121...	50.00	2014/09	Monthly	Credit Card	2490 Alpor...	Eagle	ID	83616
122...	10.00	2014/09	Monthly	Credit Card	1806 SAND...	Caldwell	ID	83605...
122...	100.00	2014/10	Monthly	Credit Card	2125 S Petr...	Boise	ID	83709
122...	50.00	2014/10	Monthly	Credit Card	2490 Alpor...	Eagle	ID	83616

Choose the format you **previously saved**, and click **[Select and Close]**.



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



Trail Blazer™

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

Related Resources

Article: [Advanced Queries – the SQL Tab](#)

Article: [SQL Wildcards](#)

Article: [Creating and Saving Default Formats for Reporting with the Grid](#)

Article: [Search Query – New Donors This Month, and This Year \(Primarily for Nonprofits\)](#)

Article: [How to Create a Donor LYBUNT Search Query \(Donors Who Gave Last Year But Unfortunately Not This Year\) and How to Save 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: [Reporting 102 – Quick Reports and Export](#)

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

Trail Blazer Live Support

☎ **Phone:** 1-866-909-8700

✉ **Email:** support@trailblz.com

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

🐦 **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.*