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Overview

In 2020 we built an API integration with the **WinRed** payment processing platform. This article walks through the steps to connect your **Trail Blazer** and <u>WinRed</u> accounts. Once linked, the data collected through your WinRed donation page will automatically be collected into your database. This in turn makes filing your FEC reports even easier.

Important: you will need to be logged in via **app.winred.com** to complete this process. This will likely change in the future as they roll out a new version of their platform.

Tip: as donations are processed they will automatically populate your **Thank You List**. Read <u>this article</u> to learn how to easily send a batch thank-you letter to supporters.

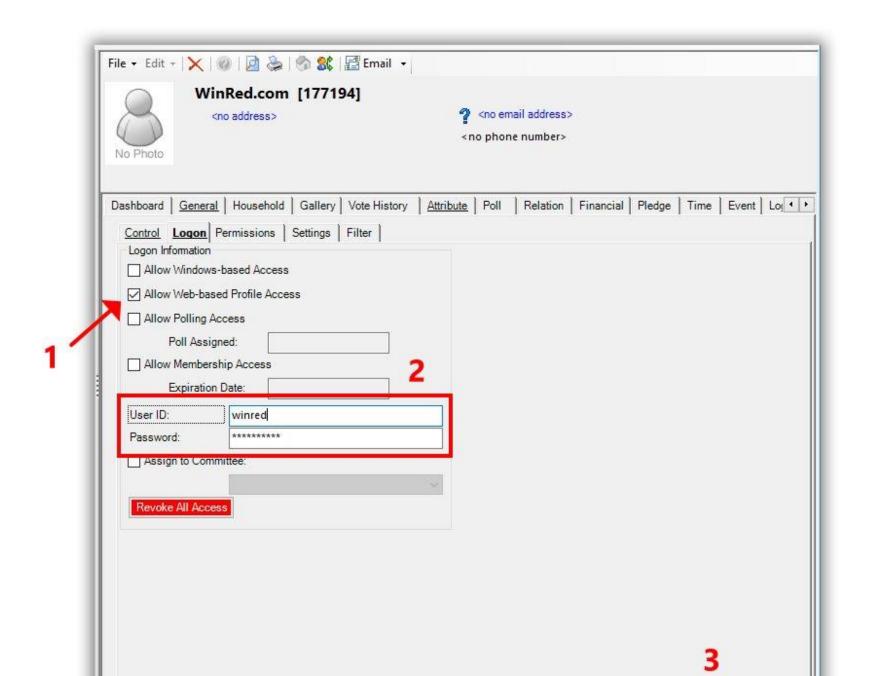


Steps

Important: you must be an admin in your Trail Blazer & WinRed accounts to be able to complete this process.

- 1. Get signed up for a WinRed account: https://winred.com/register/
- 2. Create a <u>new user</u> inside of your TB database. Give the user the name "**WinRed.com**". Check the box for **Allow Web-Based Profile Access**. Provide a username and password. Save and close. *Example below*.







3. Log into your Trail Blazer IQ account: www.trailblazeriq.com

(you'll need your workspace name – if you don't know what it is, please contact our tech support team: 1-866-909-8700 or support@trailblz.com)

This step is **just to verify** your Trail Blazer IQ login and workspace are working correctly. **Log out** once verified.

Important: you will need to be logged in via **app.winred.com** to complete this process. This will likely change in the future as they roll out a new version of their platform.

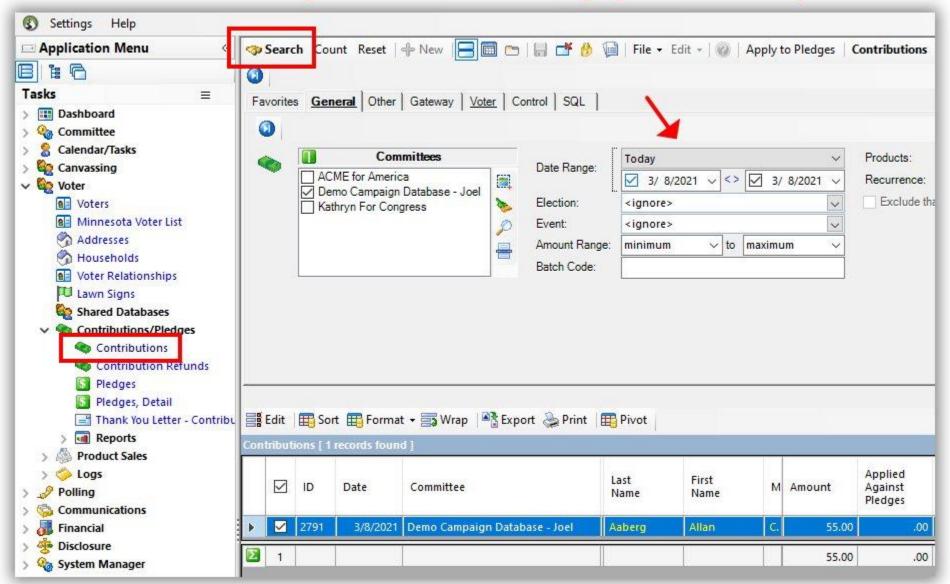
4. Log into your WinRed account and navigate to the **Utilities > Integrations** section. Click the green [+] button. This should provide a new login screen. **Use the credentials you created in the previous** steps when you created a new user named "WinRed.com" in your database. Then make sure to **toggle** the connection for Trailblz to 'on'.

This should complete the connection.

5. Run a test donation through your WinRed contribution form. Within a few seconds the record should populate the **Contributions list** inside your database. Example:



Verify a WinRed transaction populates correctly.







Take a look at the Related Resources below for quick links to other related articles and videos.



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

Related Resources

Article: Write Thank You Letters (Receipts) to Donors and Flag them as Thanked

Article: Adding a New Database User and Setting their Security Settings **Video:** Getting Started 107 – Writing Contribution Thank You Letters

Video: Thank you's using mass email

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.

<u>Click here</u> to view our calendar for upcoming classes and events. You can 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 training classes.
- * This service <u>is</u> included in your contract.