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## Overview

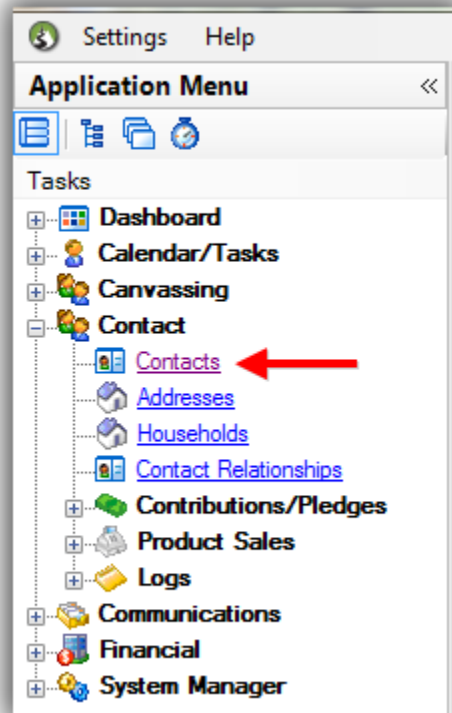
Learn the basics to **write a letter** in **Trail Blazer** using **merge fields**, images, adjust margins, and **save the template** in the 'cloud' for future use. In the **Related Resources** section at the bottom there are a variety of other articles and videos that will help get you up to speed on utilizing the word processing features in your database.

 **Tip:** This task is covered in-depth in our *free* introduction training class that's offered twice a week. If you haven't had a chance to attend it you can view the upcoming dates, and register [here](#).

## Steps

1. Navigate to the list you're going to write the letter from. In this example I used the **Contacts** (*Voters/Donors*) list, but you could just as well write a letter or access your templates from other lists such as the Thank-You Letter – Contributions list, Pledges, Contributions, as well as a few others.

## (Mail-Merge) How to Write a Letter, and Save it as a Template for Future Use



2. Run a [search query](#) to pull up the list you want to send a letter to. In my example I queried for all individual donors who gave last year, but NOT yet this year ([learn to create and save your own LYBUNT query](#)). It returned **472** donor records.

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**Build and run your search query for the list of contacts you want to write a letter to.**

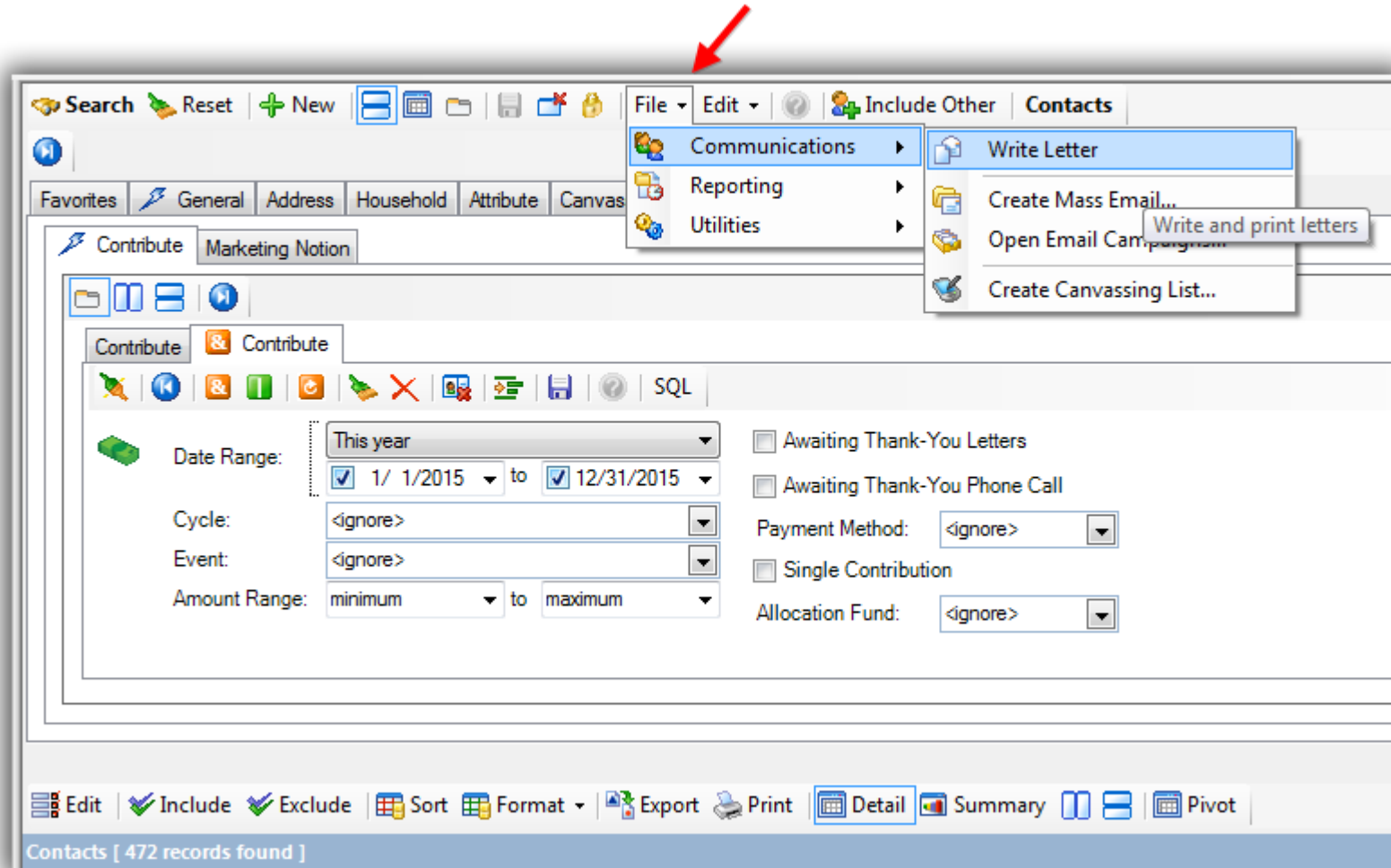
The screenshot shows the TrailBlazer interface with the 'Search' button highlighted in a red box. Below the search filters, the 'Contacts [ 472 records found ]' section is also highlighted in a red box. The table below displays the first four records of the search results.

Incl	ID	Last Name	First Name	MI	Address Type	Address	Address Line 2	City	State	Zip Code	Home Phone	Email
<input checked="" type="checkbox"/>	15	Abdurahman	Avan	Adan	Home	811 28th Ave S	Apt 1	Minneapolis	MN	55454	(651) 645-7234	
<input checked="" type="checkbox"/>	61	Aho	William	Lloyd	Home	1765 Clover Valley Dr		Duluth	CT	06500	(218) 525-9415	
<input checked="" type="checkbox"/>	79	Adams	Manette		Home	560 Ballantyne Ln NE		Spring Lake Park	CT	06500	(651) 336-8728	Manette@Adams.com
<input checked="" type="checkbox"/>	82	Alexander-Knight	Nicola	Alicia	Home	3646 2 1/2 St NE		Minneapolis	MN	55418	(612) 345-7138	

3. Click the **File** drop-down > **Communications** > **Write Letter**

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**Initiate the letter writing process.**

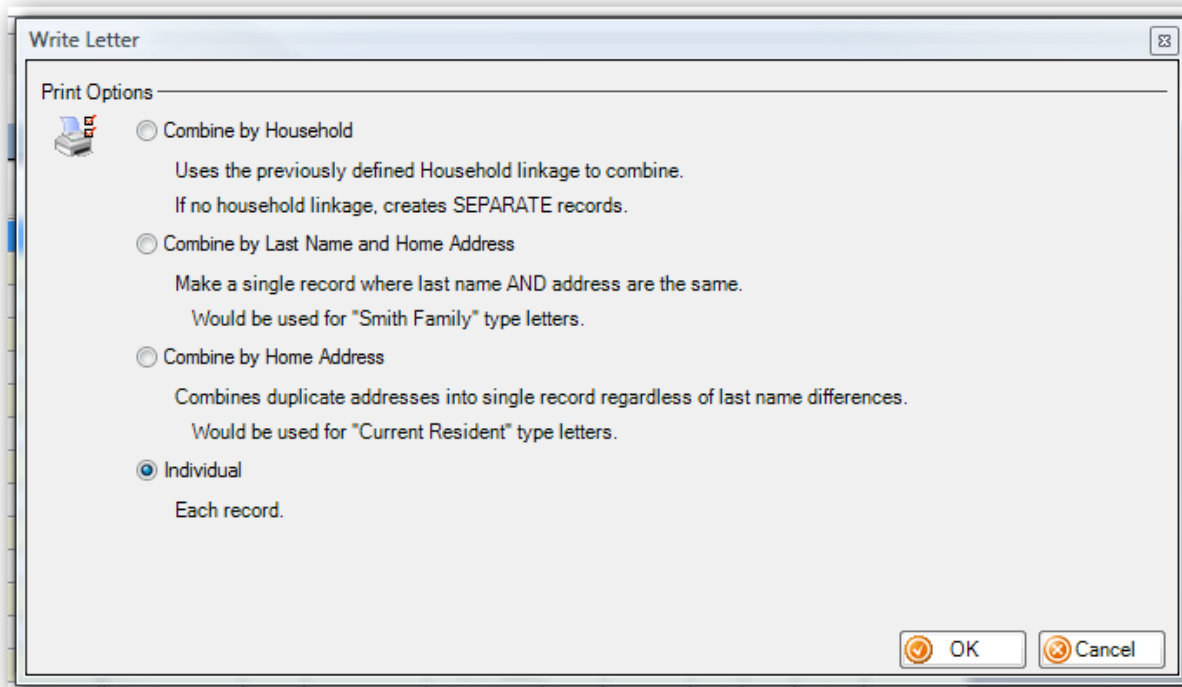


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4. Select which preferences you would like for who the letter will be delivered to. *In my example I selected to write the letter to each **individual** in the list.*
- **Combine by Household:** *Uses the previously defined Household linkage to combine. If no household linkage, creates SEPARATE records.*
  - **Combine by Last Name and Home Address:** *Make a single record where last name AND address are the same. Would be used for “Smith Family” type letters.*
  - **Combine by Home Address:** *Combines duplicate addresses into single record regardless of last name differences. Would be used for “Current Resident” type letters.*
  - **Individual:** *Each record.*

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5. Click **[OK]** to proceed.



6. This will open the letter editor window. *Trail Blazer* currently uses an [RTF editor](#) for the word processor.

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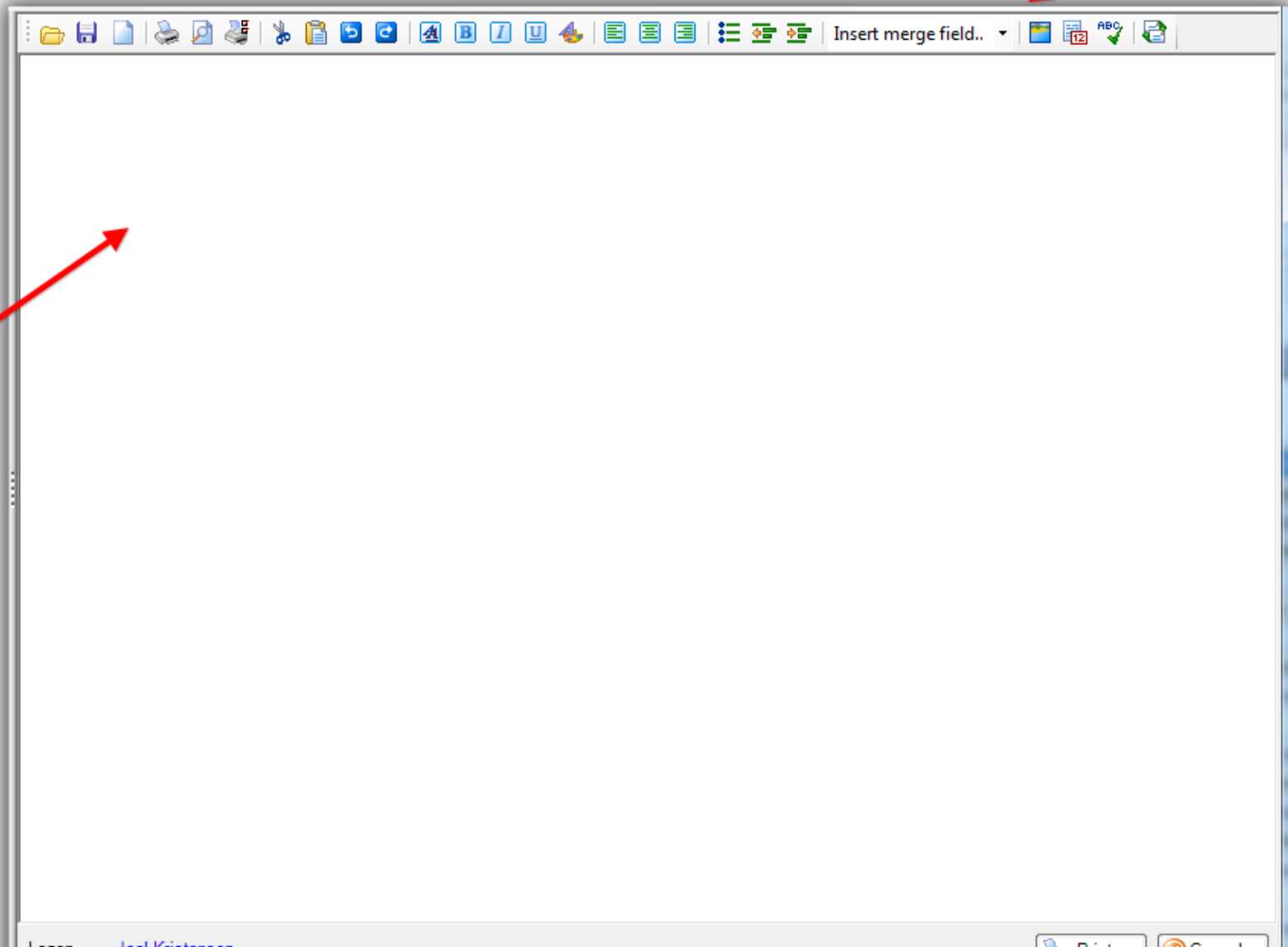


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**RTF editor - word processing screen.**

**Insert merge fields.**

**Text goes here.**

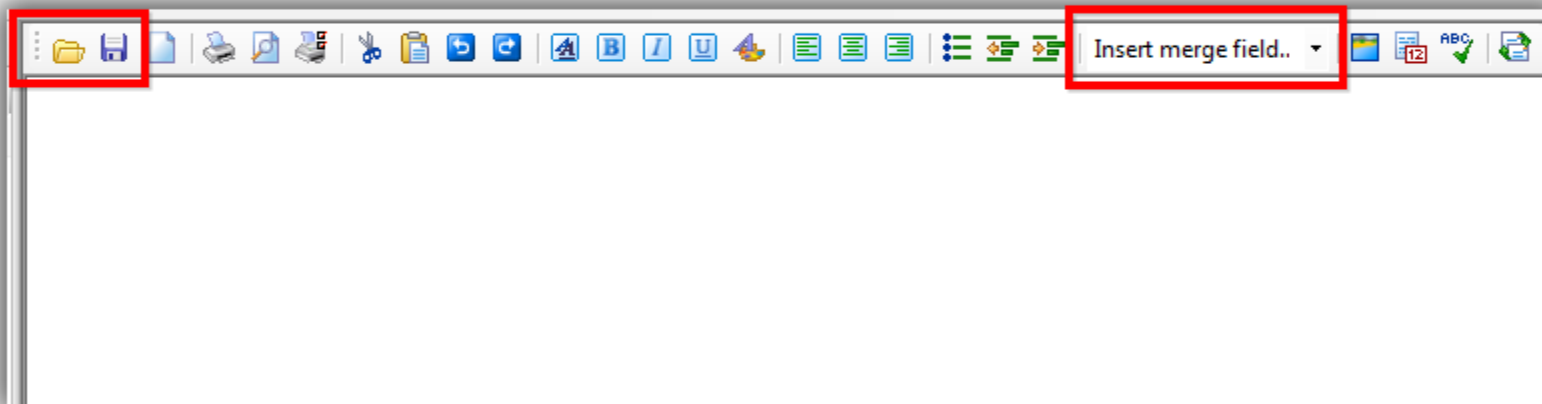


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7. From here you can **Load/Save** a template, **Insert Merge Fields** (shown in the image below), and many other letter writing functions. We have a specific procedure for sending **Contribution Thank-You** letters that contain more merge fields that are specific to thanking someone for a donation – this video shows how to write that type of letter ([https://www.youtube.com/watch?v=lj36El\\_dj00](https://www.youtube.com/watch?v=lj36El_dj00)).

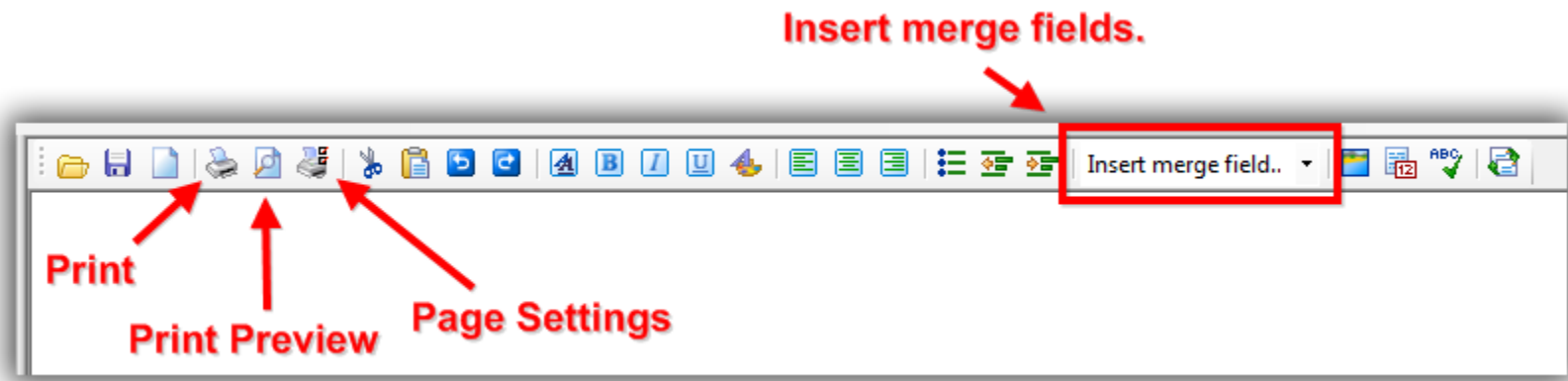
Used very \*rarely - you can save the letter/open a letter as an .rtf file.

Insert merge fields.



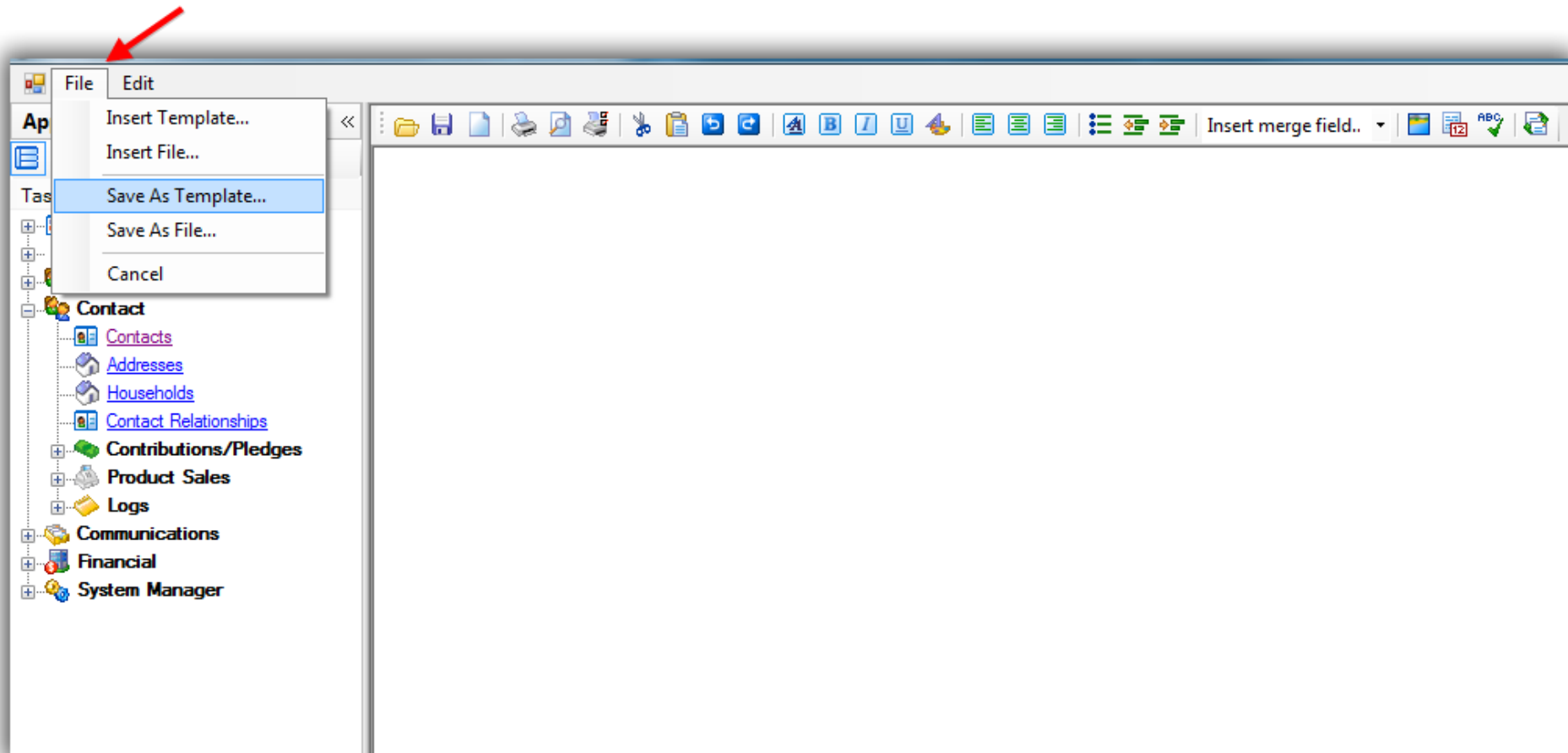
8. After you finish creating your letter template you can click **[Print]** from the bottom-right of the screen or from the task bar at the top. You can also adjust **Page Settings** and view a **Print Preview**. Detailed below.

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9. Once the letter is complete, select **File** in the extreme upper-left, and **Save as Template...**

**By saving as a template you can insert the template again in the future and other database users will also have access to it.**



10. Here's the text I used for my letter template, you can copy-and-paste this into your database as a starting point:

---COPY BELOW THIS LINE---

Demo Nonprofit Organization  
620 Mendelssohn Avenue North  
Suite 186  
Golden Valley, MN, 55427-4350  
1-866-909-8700

«MM/dd/yyyy»

«FirstName» «LastName»  
«Home Address Block»

Dear «FirstName»,

Thank you for your contribution of «Contribution Last Amount» on «Contribution Last Date».

Please keep this written acknowledgment of your donation for your tax records. Starting January 1, 1994, the IRS will no longer accept your canceled check as proof of any donation of \$250 or more. Changes in tax law also require us to estimate the value of goods or services, if any, that have been rendered to you in return for your contribution, and to remind you that your contribution is deductible only to the extent that it exceeds what we have provided.

Thank you for your continuing support for our important work in this field!

Very truly yours,

*Joel Kristenson*

Joel Kristenson  
Founder, of Organization

---COPY ABOVE THIS LINE---

11. Here's a **print preview** of how this *example* letter would look:

## (Mail-Merge) How to Write a Letter, and Save it as a Template for Future Use

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Demo Nonprofit Organization  
620 Mendelssohn Avenue North  
Suite 186  
Golden Valley, MN, 55427-4350  
1-866-909-8700

11/24/2015

Ayan Abdurahman  
811 28th Ave S  
Apt 1  
Minneapolis, MN 55454

Dear Ayan,

Thank you for your contribution of \$149.00 on November 27, 2014.

Please keep this written acknowledgment of your donation for your tax records. Starting January 1, 1994, the IRS will no longer accept your canceled check as proof of any donation of \$250 or more. Changes in tax law also require us to estimate the value of goods or services, if any, that have been rendered to you in return for your contribution, and to remind you that your contribution is deductible only to the extent that it exceeds what we have provided.

Thank you for your continuing support for our important work in this field!

Very truly yours,

*Joel Kristenson*

## (Mail-Merge) How to Write a Letter, and Save it as a Template for Future Use

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12. That concludes the 'simplified' steps to create a letter template, and save it for future use. The **Related Resources** below link to a variety of other articles and videos on the letter writing features.



**Trail Blazer™**

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



## Related Resources

**Article:** [Mail Merge – Write a Letter](#)

**Article:** [Printing Envelopes](#)

**Article:** [How to Track Soft Credits using Contribution Notifications – ONLY for Nonprofit Customers](#)

**Article:** [How to Print Mail-Merge Address Labels](#)

**Article:** [Managing Households – Creating, Deleting and Re-Creating](#)

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

**Video:** [Year End Tax Letter](#)

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

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

## Trail Blazer Live Support

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☎ **Phone:** 1-866-909-8700

✉ **Email:** [support@trailblz.com](mailto:support@trailblz.com)

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

t **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.*