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Last Updated: 2015-11-19

Overview

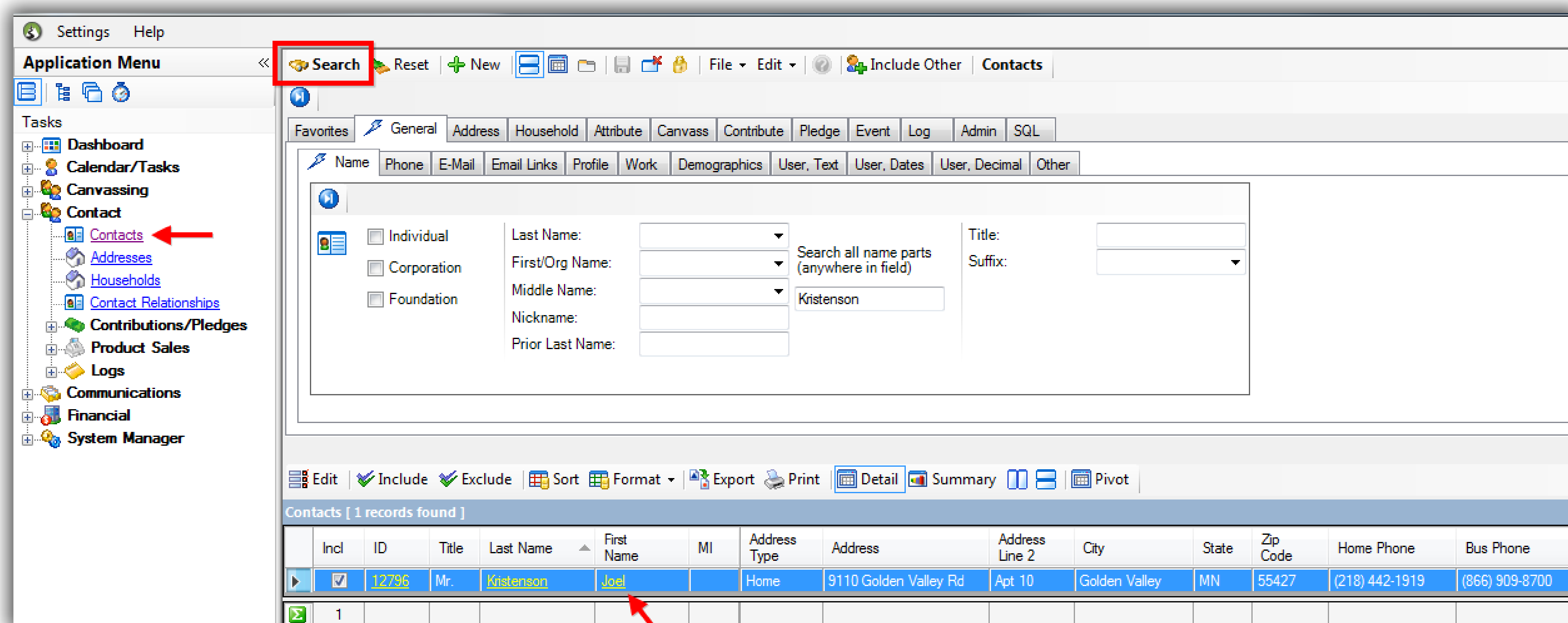
This article walks through the steps to record a '**soft credit**' for a contribution record using the **contribution notifications** system. It also goes through the steps to query by these types of donations to show who hasn't been thanked yet for their soft credit, as well as how to send a thank-you notification letter to the 'soft credit' recipient.

Tip: Near the end of the article there is an *example* letter template you can copy-and-paste into your own database as a starting point for a 'Thank-You Notification' letter.

Steps

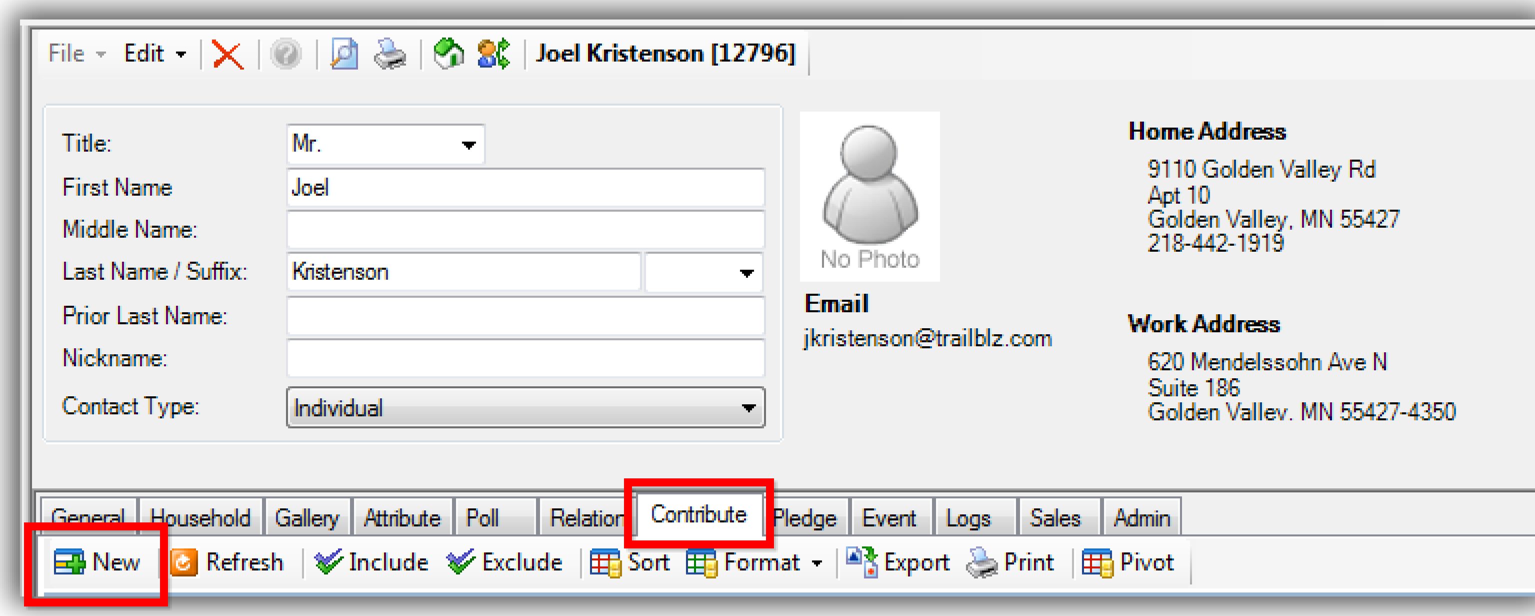
Navigate to your contacts (*donors*) list, run a search for the donor who sent in the donation, and open their record card. *In my example I searched for my own record 'Joel Kristenson'.*

Run a search query for your donor and open their record card.

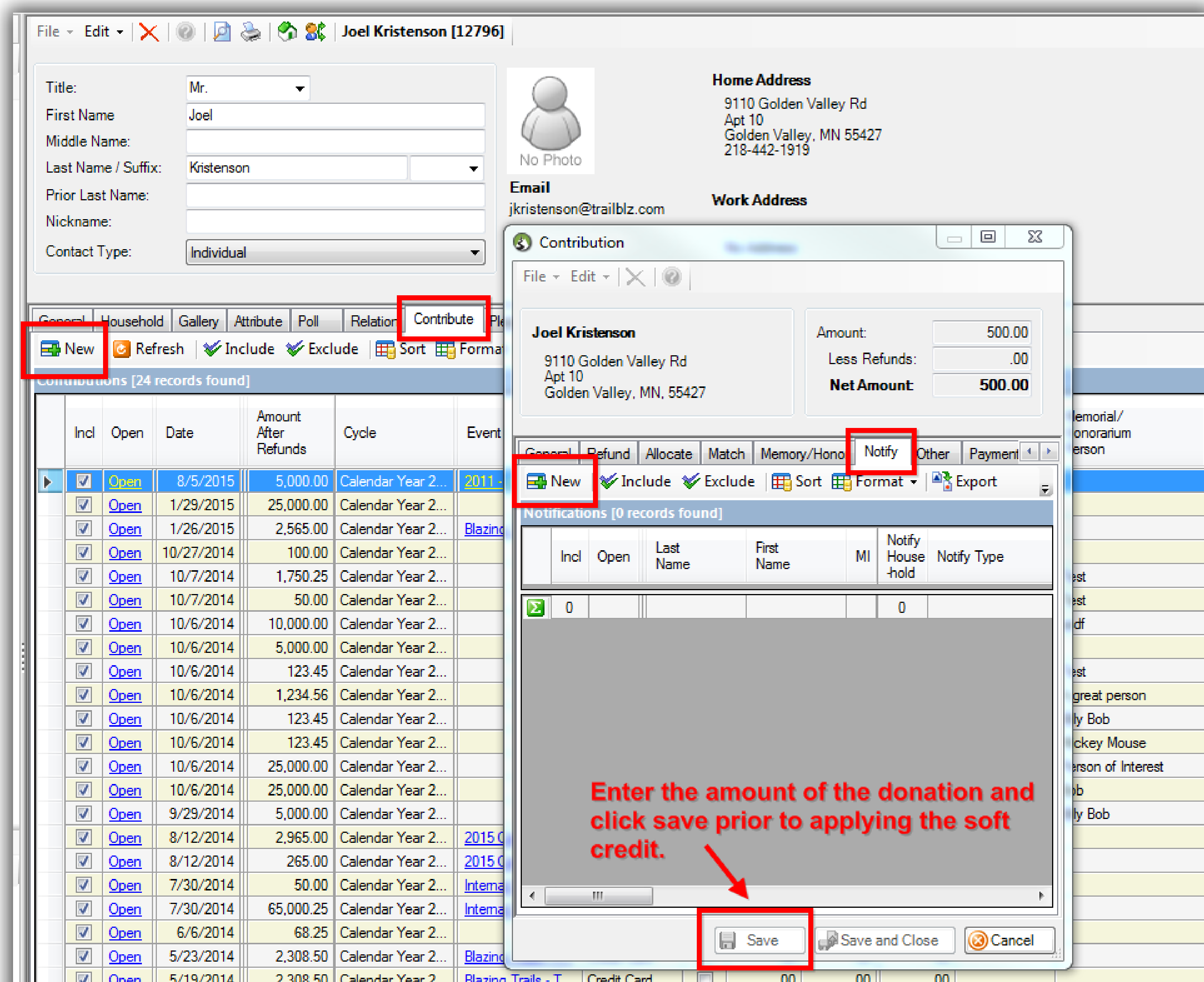


Click on any of the hyperlinks to open their record.

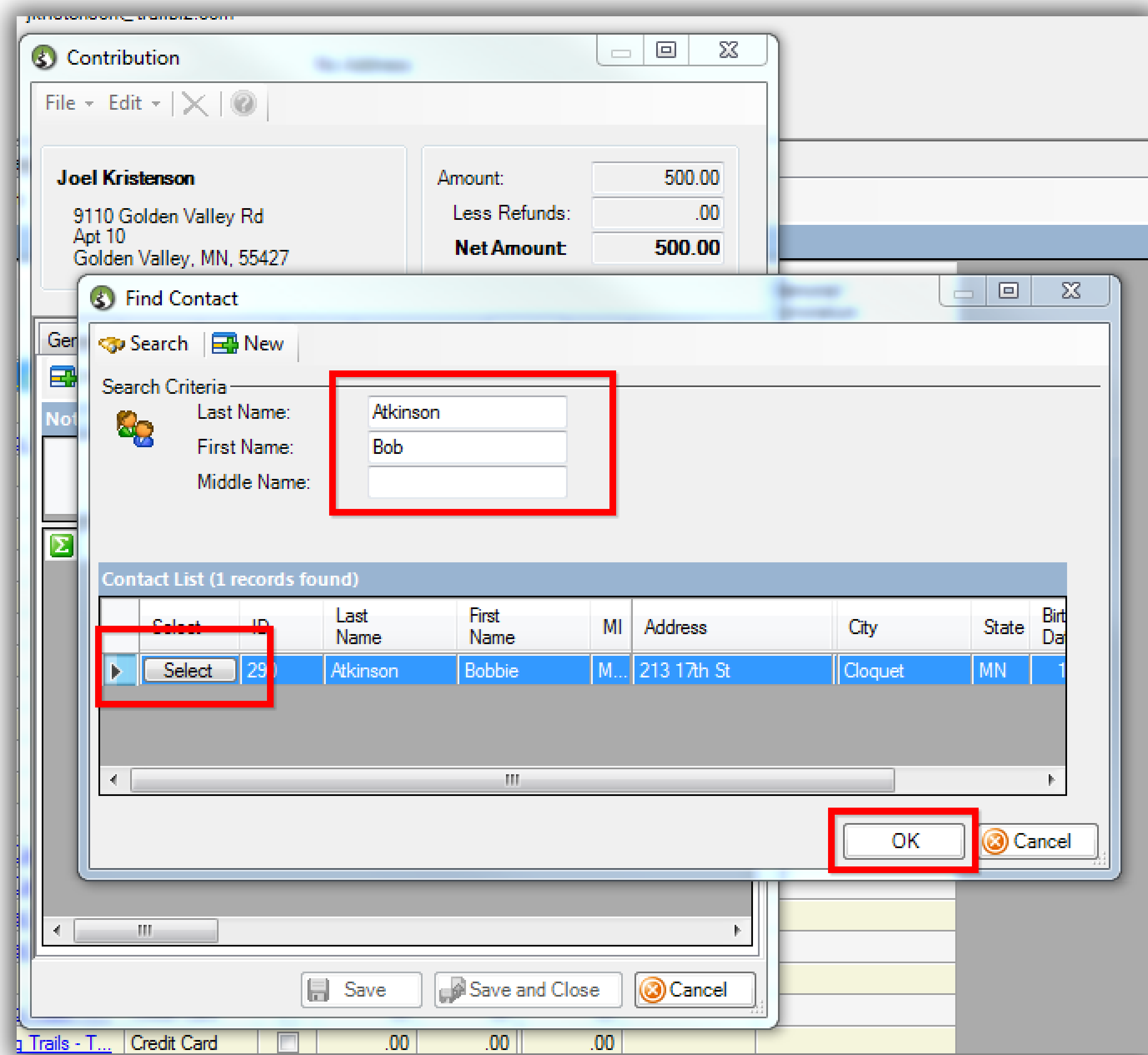
Navigate to the **Contribute** tab, and click **[New]**.



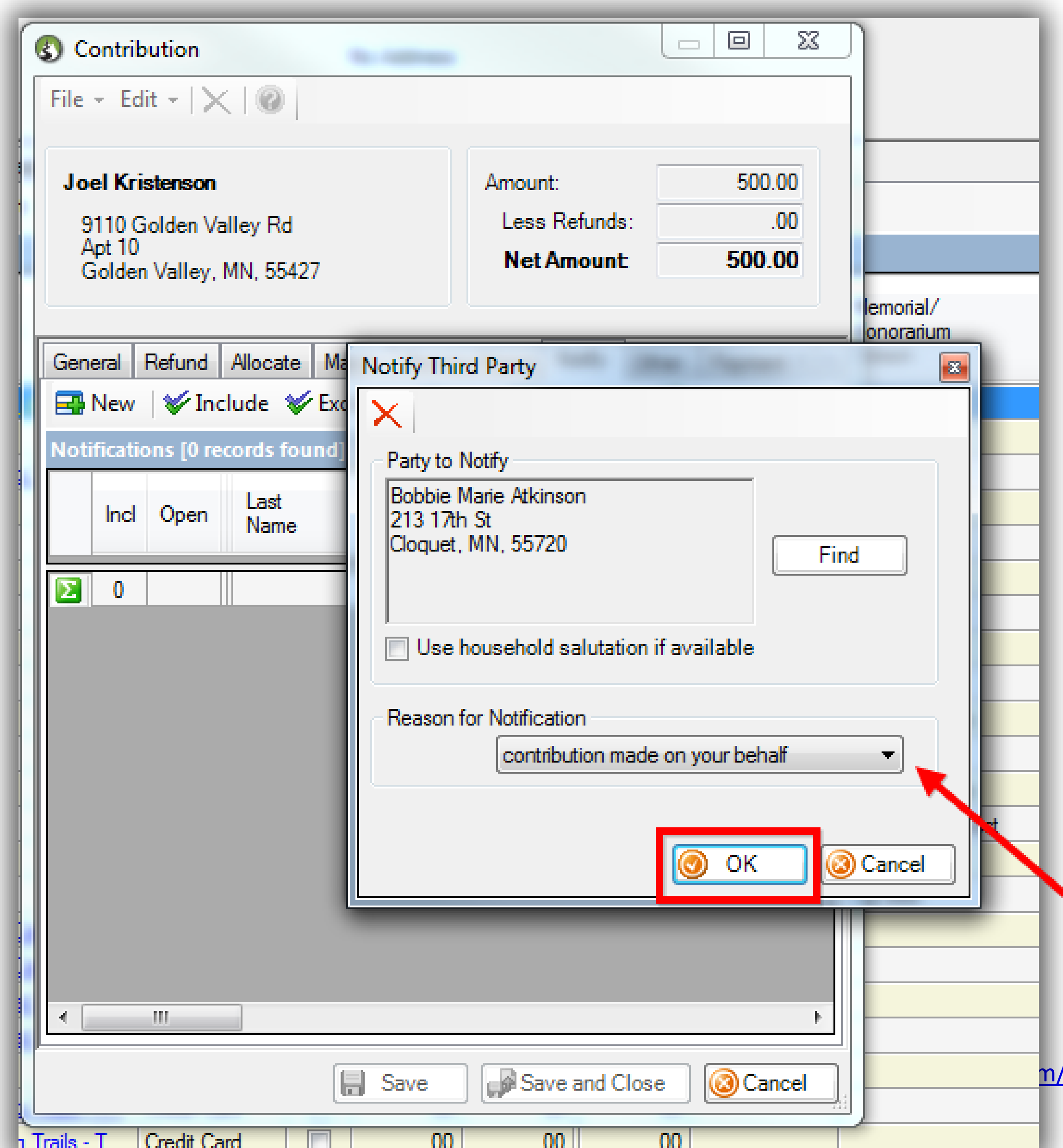
Input all of the general donation information i.e. Date/Amount, etc., and click **[Save].** (*It's important to save the contribution record before applying the soft credit – otherwise you'll get an error message*). Next, navigate to the **Notify** tab and click **[New]**. *My example is below for a $500.00 donation.*


Joel Kristenson [12796]
Title: Mr.
First Name Joel
Middle Name:
Last Name / Suffix: Kristenson
Prior Last Name:
Nickname:
Contact Type: Individual
No Photo
Email
jkristenson@trailblz.com
Home Address
9110 Golden Valley Rd
Apt 10
Golden Valley, MN 55427
218-442-1919
Work Address
Contribute
New
Refresh
Include
Exclude
Sort
Contributions [24 records found]
Contribution
Joel Kristenson
9110 Golden Valley Rd
Apt 10
Golden Valley, MN, 55427
Amount: 500.00
Less Refunds: .00
Net Amount: 500.00
General
Refund
Allocate
Match
Memory/Hono
Notify
Other
Payment
New
Include
Exclude
Sort
Format
Export
Notifications [0 records found]
Incl
Open
Last Name
First Name
MI
Notify House-hold
Notify Type
Enter the amount of the donation and click save prior to applying the soft credit.
Save
Save and Close
Cancel

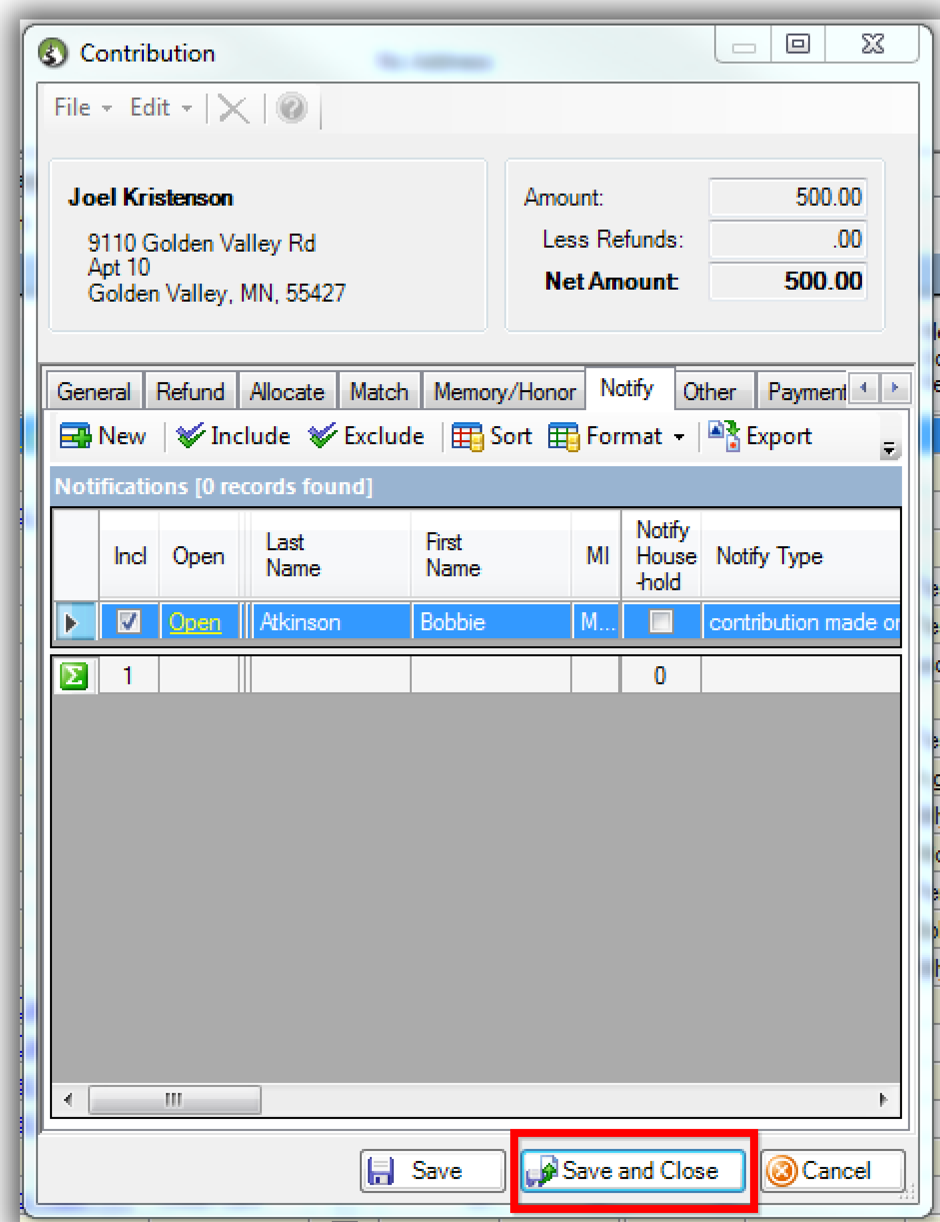
Search for person in your database you need to apply a 'soft credit' too, click **[Select]**, and then click **[OK]**. If they don't exist in your database yet, click the **[+ New]** button to add them as a new record. *In my example I searched for a person named "Bobbie Atkinson" who was already in the system.*


Contribution
File
Edit
Joel Kristenson
9110 Golden Valley Rd
Apt 10
Golden Valley, MN, 55427
Amount: 500.00
Less Refunds: .00
Net Amount: 500.00
Find Contact
Search
New
Search Criteria
Last Name: Atkinson
First Name: Bob
Middle Name:
Contact List (1 records found)
Select
ID
Last Name
First Name
MI
Address
City
State
Atkinson
Bobbie
213 17th St
Cloquet
MN
OK
Cancel
Save
Save and Close
Cancel
Credit Card
.00
.00
.00

Select the '**Reason for Notification**' from the drop-down list, and then click **[OK]**. *In my example I selected 'contribution made on your behalf'.*


Contribution
File Edit
Joel Kristenson
9110 Golden Valley Rd
Apt 10
Golden Valley, MN, 55427
Amount: 500.00
Less Refunds: .00
Net Amount: 500.00
General
Refund
Allocate
New
Include
Notifications [0 records found]
Incl
Open
Last Name
Notify Third Party
Party to Notify
Bobbie Marie Atkinson
213 17th St
Cloquet, MN, 55720
Find
Use household salutation if available
Reason for Notification
contribution made on your behalf
OK
Cancel
Save
Save and Close
Cancel
Credit Card

Finish recording any other information you have for the contribution record, and then click **[Save and Close]**.


Contribution
File
Edit
Joel Kristenson
9110 Golden Valley Rd
Apt 10
Golden Valley, MN, 55427
Amount: 500.00
Less Refunds: .00
Net Amount: 500.00
General
Refund
Allocate
Match
Memory/Honor
Notify
Other
Payment
New
Include
Exclude
Sort
Format
Export
Notifications [0 records found]
Incl
Open
Last Name
First Name
MI
Notify House-hold
Notify Type
Open
Atkinson
Bobbie
M...
contribution made or
1
0
Save
Save and Close
Cancel

That completes the steps to record the contribution, and the soft credit.

To run a report for soft credits, and to send out the thank-you letters, navigate to the **Contribution Notifications** list and click **[Search]** to populate the list. *In my example it returned 38 records where a donation has a soft credit attached, and the person still needs to be acknowledged for it.*

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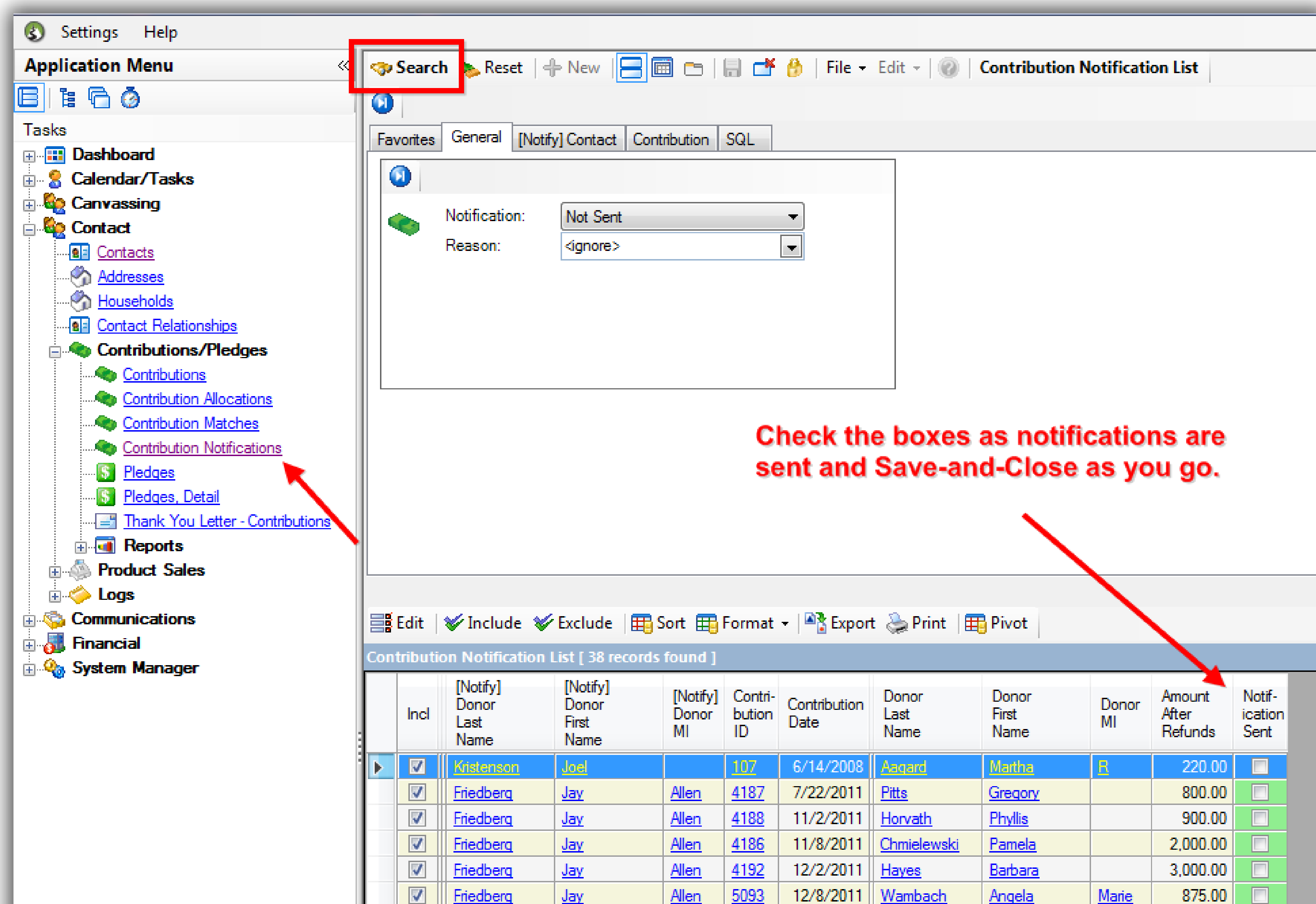
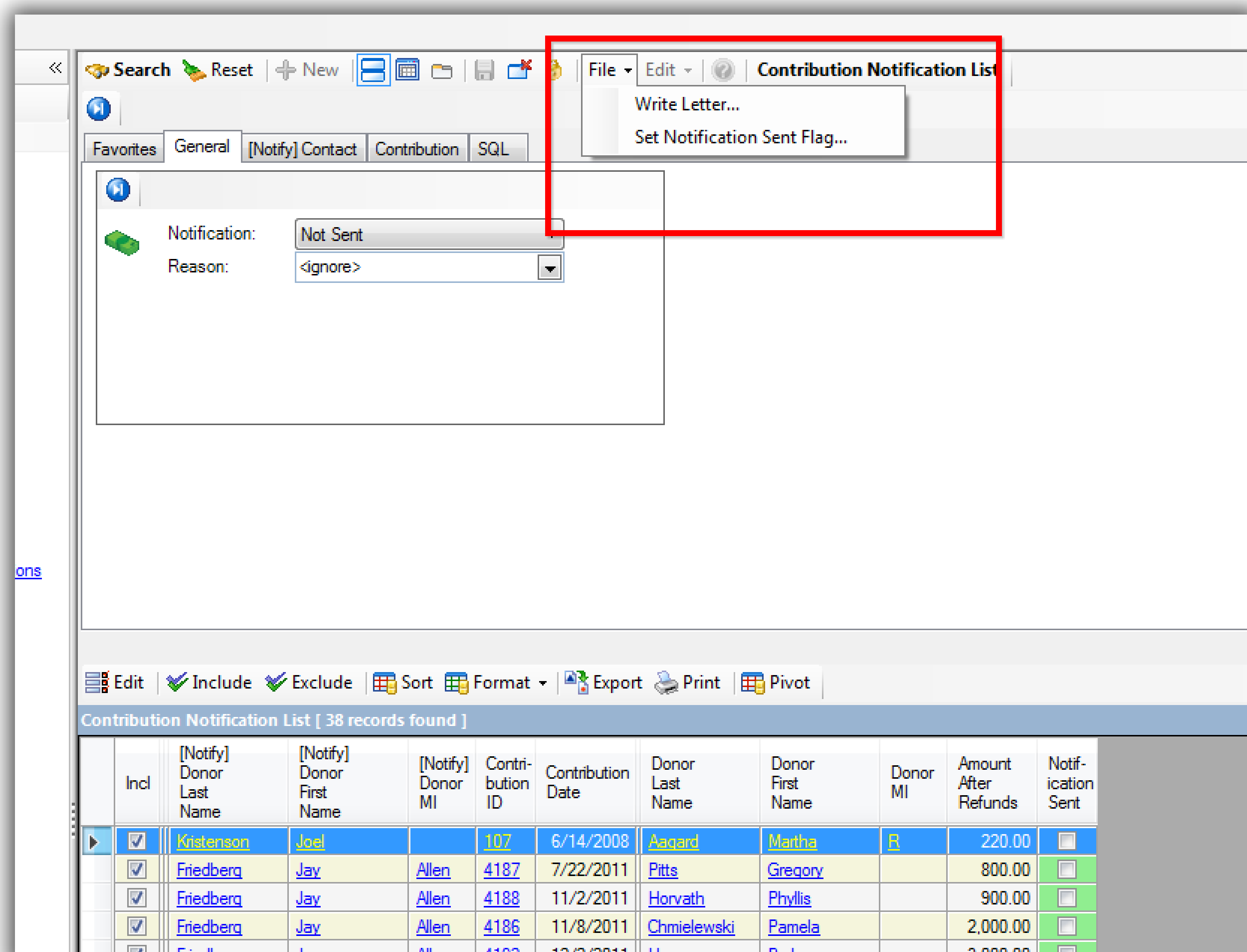


As you send out your acknowledgement letters you can check the boxes in the green column called '**Notification Sent**' and save as you go, the steps below show how to write multiple letters at once.

On the search tool strip select **File > Write Letter…**


Search
Reset
New
File
Edit
Contribution Notification List
Write Letter...
Set Notification Sent Flag...
Favorites
General
[Notify] Contact
Contribution
SQL
Notification:
Not Sent
Reason:
<ignore>
Edit
Include
Exclude
Sort
Format
Export
Print
Pivot
Contribution Notification List [38 records found]
Incl
[Notify] Donor Last Name
[Notify] Donor First Name
[Notify] Donor MI
Contri-bution ID
Contribution Date
Donor Last Name
Donor First Name
Donor MI
Amount After Refunds
Notif-ication Sent
Kristenson Joel 107 6/14/2008 Aagard Martha R 220.00
Friedberg Jay Allen 4187 7/22/2011 Pitts Gregory 800.00
Friedberg Jay Allen 4188 11/2/2011 Horvath Phyllis 900.00
Friedberg Jay Allen 4186 11/8/2011 Chmielewski Pamela 2,000.00

Create your **Soft Credit - Acknowledgment Letter** using the appropriate **merge fields**, your own images, text, signature, margins, etc. You can use the example below as a starting point:

--- Copy Text Below This Line ---

«MMMM dd, yyyy»

«FirstName» «LastName»
«Mail Address Block»

Dear «NickName Or FirstName»,

This letter is to let you know that a contribution of «Amount Contribution» was made in your name by «Donor FirstName» «Donor LastName».

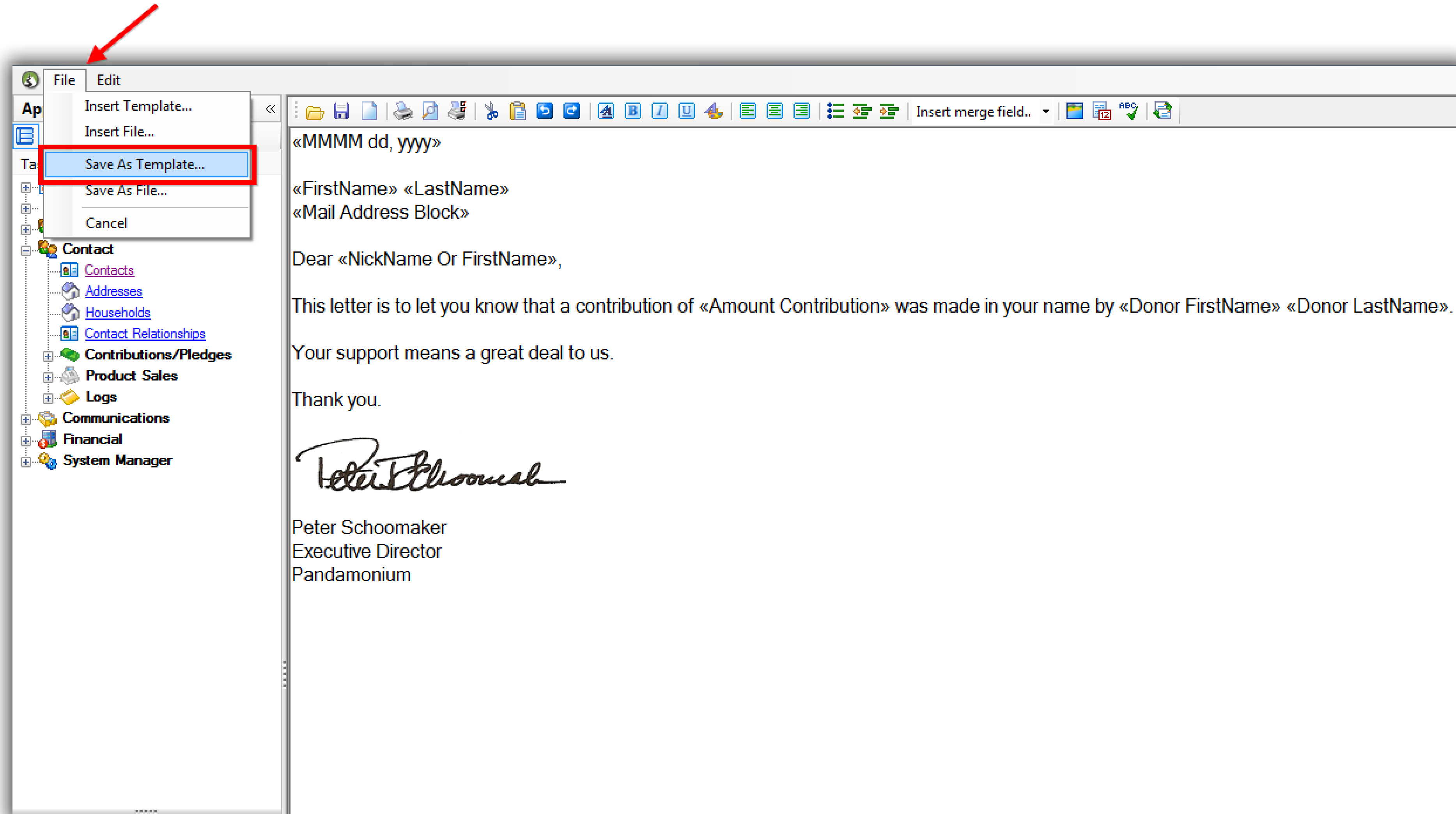
Your support means a great deal to us.

Thank you.

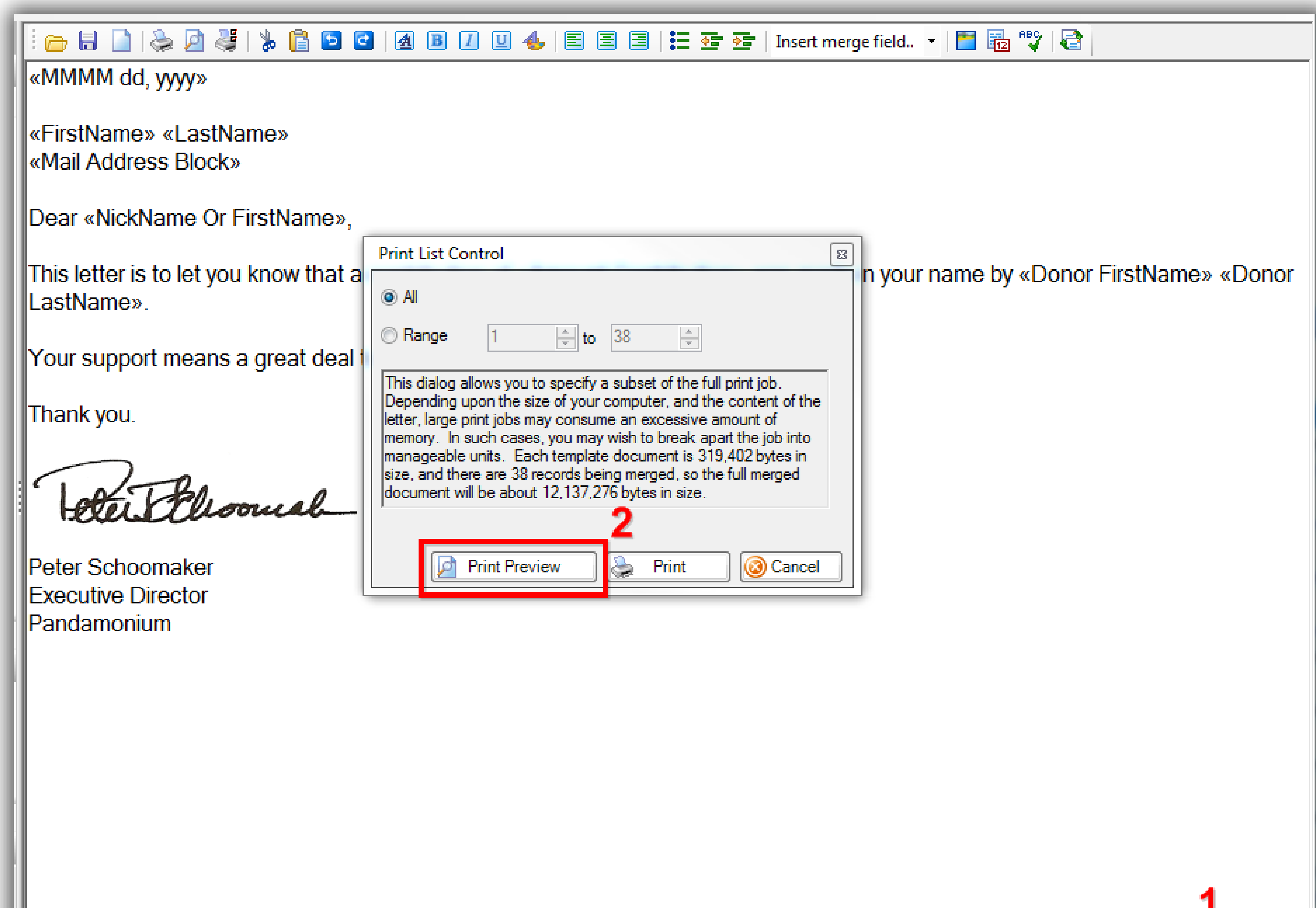
Peter Schoomaker
Executive Director
Pandamonium

--- Copy Text Above This Line ---

Once your template is finished you'll want to save it for future use, click **File > Save As Template…**


File
Edit
Insert Template...
Insert File...
Save As Template...
Save As File...
Cancel
Contact
Contacts
Addresses
Households
Contact Relationships
Contributions/Pledges
Product Sales
Logs
Communications
Financial
System Manager
Insert merge field..
«MMMM dd, yyyy»
«FirstName» «LastName»
«Mail Address Block»
Dear «NickName Or FirstName»,
This letter is to let you know that a contribution of «Amount Contribution» was made in your name by «Donor FirstName» «Donor LastName».
Your support means a great deal to us.
Thank you.
Peter Schoomaker
Executive Director
Pandamonium

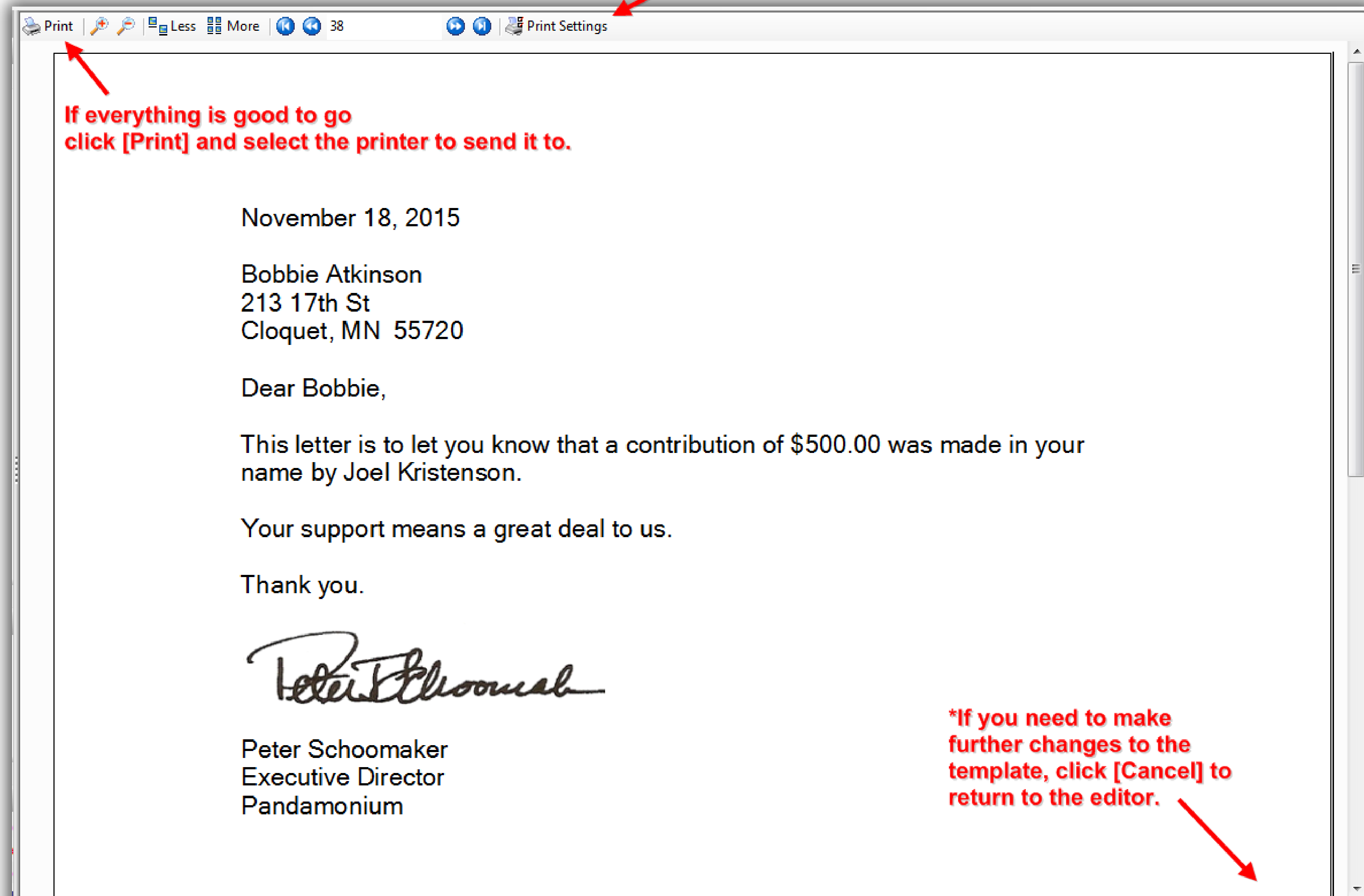
Once you’re ready to print or run a test print, click **[Print]** in the bottom-right, and then select **[Print Preview]**.


Insert merge field..
«MMMM dd, yyyy»
«FirstName» «LastName»
«Mail Address Block»
Dear «NickName Or FirstName»,
This letter is to let you know that a
n your name by «Donor FirstName» «Donor
LastName».
Your support means a great deal
Thank you.
Peter Schoomaker
Executive Director
Pandamonium
Print List Control
All
Range
1
to
38
This dialog allows you to specify a subset of the full print job. Depending upon the size of your computer, and the content of the letter, large print jobs may consume an excessive amount of memory. In such cases, you may wish to break apart the job into manageable units. Each template document is 319,402 bytes in size, and there are 38 records being merged, so the full merged document will be about 12,137,276 bytes in size.
2
Print Preview
Print
Cancel
1

Tip: If you're running a test print set the range of pages to print to something like 1-5 so that you don't have to sit and wait for all the letter previews to load.

My example print preview is below:

*If necessary, adjust paper type, orientation, margins, etc.



November 18, 2015

Bobbie Atkinson
213 17th St
Cloquet, MN 55720

Dear Bobbie,

This letter is to let you know that a contribution of $500.00 was made in your name by Joel Kristenson.

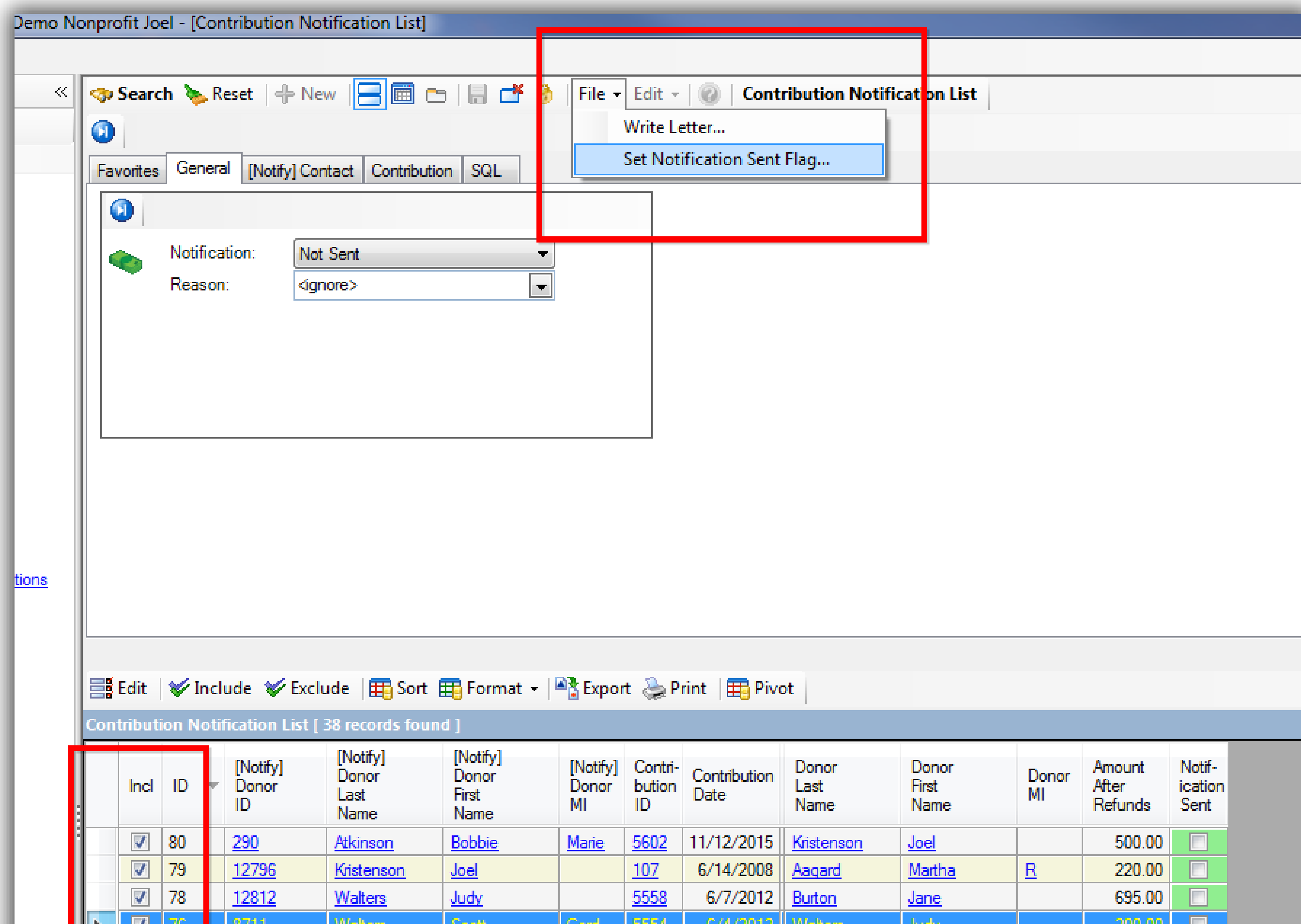
Your support means a great deal to us.

Thank you.

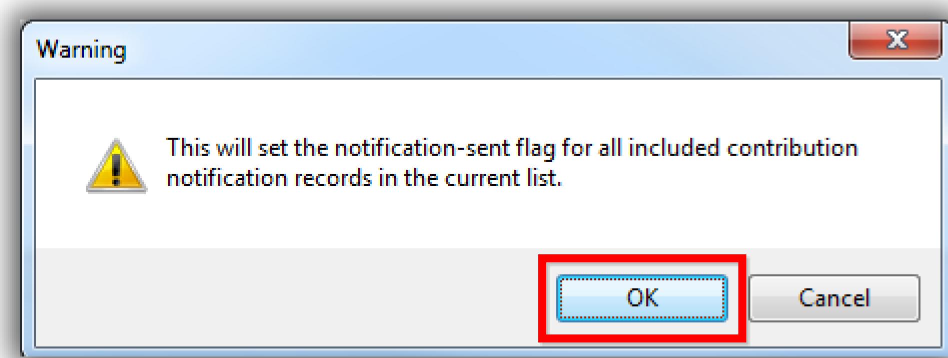
Peter Schoomaker
Executive Director
Pandamonium

After you print out the notification letter(s), return to the **Contribution Notifications** list.

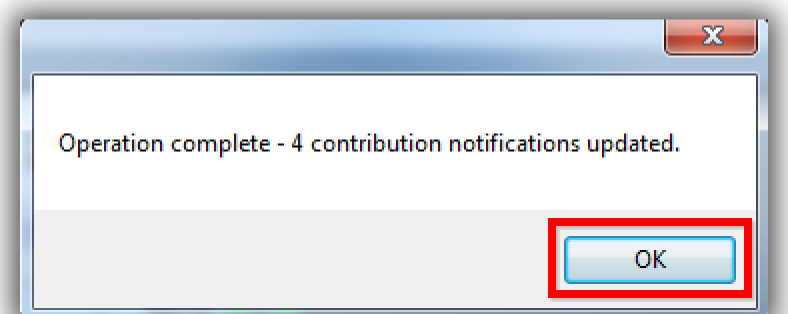
Check the boxes in the **Include** column for the people who were thanked, and then click **File > Set Notification Sent Flag…** *In my example I set the flag for 4 contacts.*


Demo Nonprofit Joel - [Contribution Notification List]
Search
Reset
New
File
Edit
Contribution Notification List
Write Letter...
Set Notification Sent Flag...
Favorites
General
[Notify] Contact
Contribution
SQL
Notification:
Not Sent
Reason:
<ignore>
Edit
Include
Exclude
Sort
Format
Export
Print
Pivot
Contribution Notification List [38 records found]
Incl
ID
[Notify] Donor ID
[Notify] Donor Last Name
[Notify] Donor First Name
[Notify] Donor MI
Contri-bution ID
Contribution Date
Donor Last Name
Donor First Name
Donor MI
Amount After Refunds
Notif-ication Sent
80 290 Atkinson Bobbie Marie 5602 11/12/2015 Kristenson Joel 500.00
79 12796 Kristenson Joel 107 6/14/2008 Aagard Martha R 220.00
78 12812 Walters Judy 5558 6/7/2012 Burton Jane 695.00

Click **[OK]** to proceed.



Click **[OK]** again once the utility is finished running.



That completes the steps in this article. You could go a step further and record a log note in the contact's record where you can store a copy of the actual letter that went out.

The related resources below link to a variety of articles and videos related to writing mail-merge letters through your database.

Related Resources

Article: Mail Merge – Write a Letter
Article: Enter Contributions
Article: Inserting Contribution Transactions In Donor Merge Letter
Article: Matching Contributions
Video: Getting Started 106a – Entering Contributions (NON PROFIT ONLY)
Video: Contribution – Employer Match
Video: Getting Started 107 – Writing Contribution Thank You Letters
Video: Write Letter – Edit Letter after Mail Merge
Video: Year End Tax Letter
Video: Thank A Person Once For Multiple Contributions

Trail Blazer Live Support

Phone: 1-866-909-8700 (8 am – 5 pm CT)
Email: support@trailblz.com
Facebook: https://www.facebook.com/pages/Trail-Blazer-Software/64872951180
Twitter: https://twitter.com/trailblazersoft

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