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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.

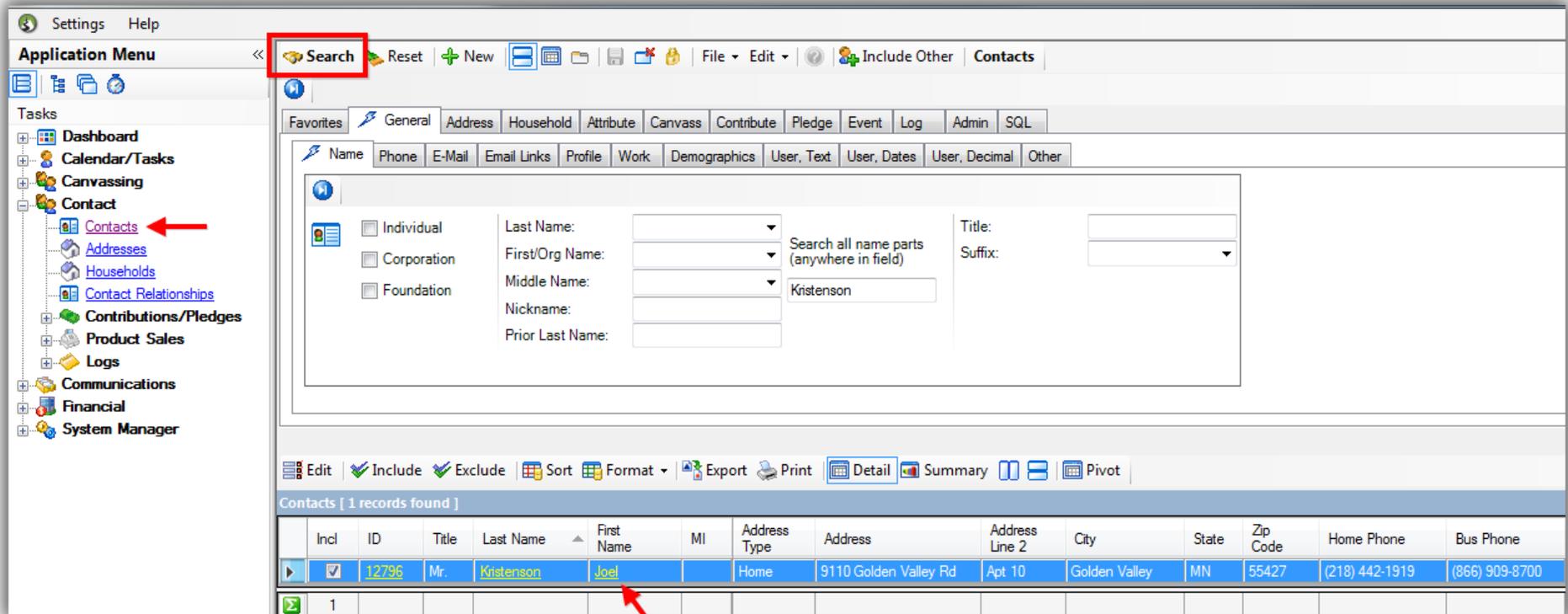
How to Track Soft Credits Using Contribution Notifications - Only for Nonprofit Customers

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'.*

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



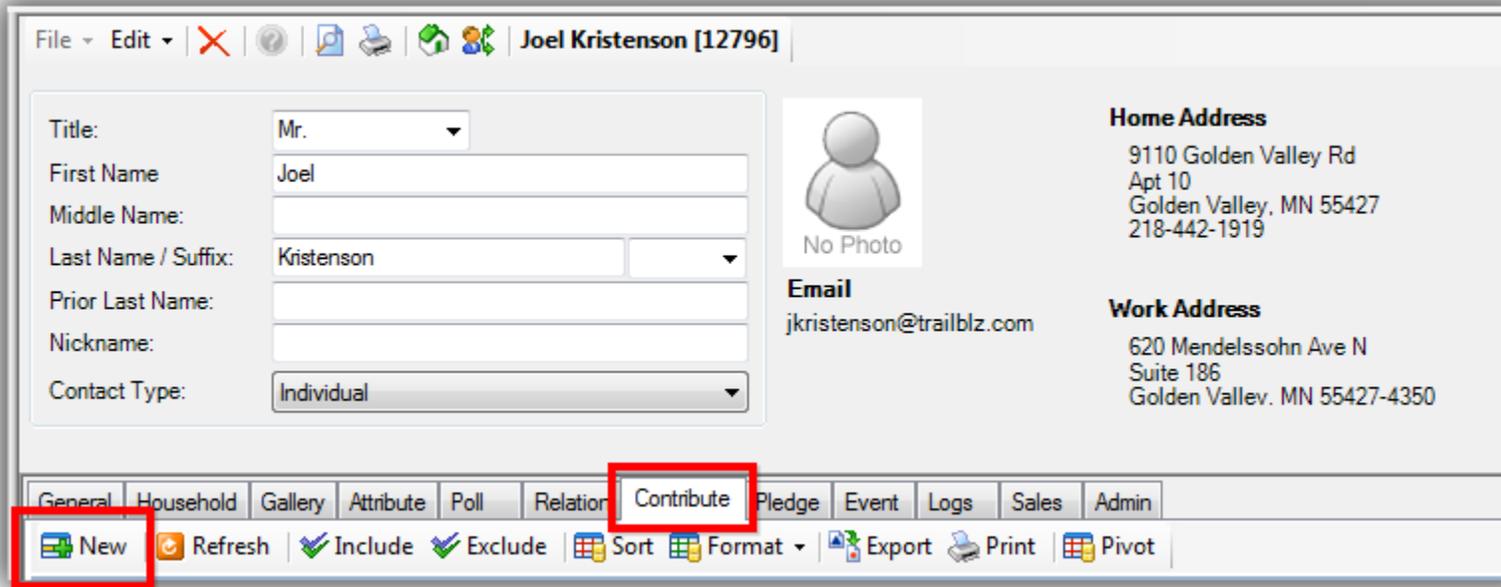
The screenshot shows the TrailBlazer software interface. On the left is a navigation menu with categories like 'Tasks', 'Dashboard', 'Calendar/Tasks', 'Canvassing', 'Contact', 'Contributions/Pledges', 'Product Sales', 'Logs', 'Communications', 'Financial', and 'System Manager'. The 'Contact' category is expanded, and a red arrow points to the 'Contacts' link. The main window displays a search results table with one record found. A red arrow points to the 'First Name' cell of this record, which contains the text 'Joel'. Above the table is a search form with fields for 'Last Name', 'First/Org Name', 'Middle Name', 'Nickname', and 'Prior Last Name'. The 'Last Name' field is populated with 'Kirstenson'. Below the table is a toolbar with options like 'Edit', 'Include', 'Exclude', 'Sort', 'Format', 'Export', 'Print', 'Detail', 'Summary', and 'Pivot'.

Incl	ID	Title	Last Name	First Name	MI	Address Type	Address	Address Line 2	City	State	Zip Code	Home Phone	Bus Phone
<input checked="" type="checkbox"/>	12796	Mr.	Kirstenson	Joel		Home	9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427	(218) 442-1919	(866) 909-8700

Click on any of the hyperlinks to open their record.

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

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File Edit X [12796]

Title: Mr.

First Name: Joel

Middle Name:

Last Name / Suffix: Kristenson

Prior Last Name:

Nickname:

Contact Type: Individual

No Photo

Home Address
9110 Golden Valley Rd
Apt 10
Golden Valley, MN 55427
218-442-1919

Email
jkristenson@trailblz.com

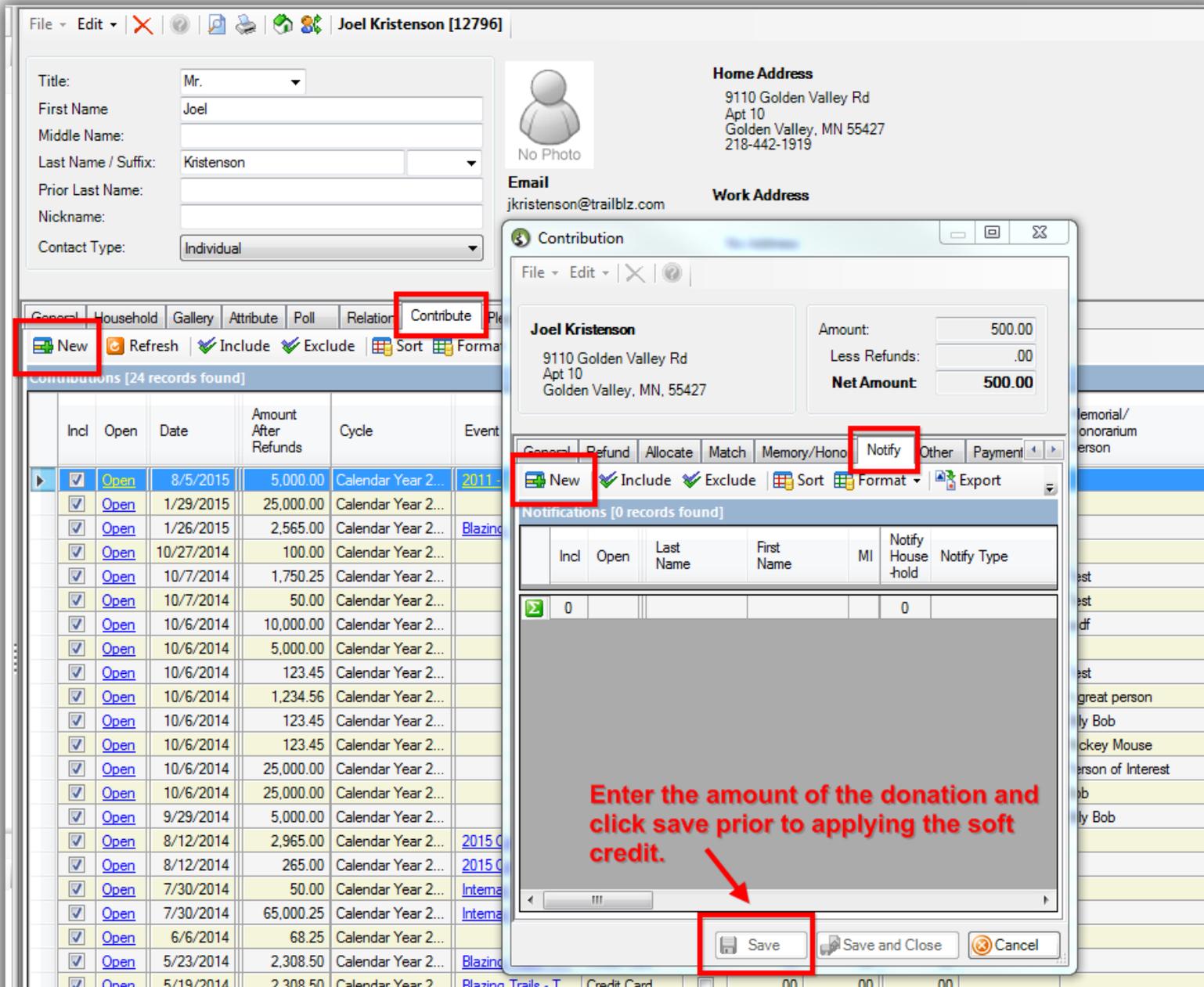
Work Address
620 Mendelssohn Ave N
Suite 186
Golden Vallev. MN 55427-4350

General Household Gallery Attribute Poll Relation **Contribute** Pledge Event Logs Sales Admin

New Refresh Include Exclude Sort Format Export Print Pivot

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.

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The screenshot shows the TrailBlazer interface with a 'Contribution' window open. The main window displays a list of contributions for Joel Kristenson, with a 'Contribute' button highlighted. The 'Contribution' window shows a form for 'Joel Kristenson' with a donation amount of 500.00 and a net amount of 500.00. A 'Notify' button is highlighted, and a 'Save' button is also highlighted. A red arrow points to the 'Save' button with the text: 'Enter the amount of the donation and click save prior to applying the soft credit.'

Contribution Details:

- Name: Joel Kristenson
- Address: 9110 Golden Valley Rd, Apt 10, Golden Valley, MN, 55427
- Amount: 500.00
- Less Refunds: .00
- Net Amount: 500.00

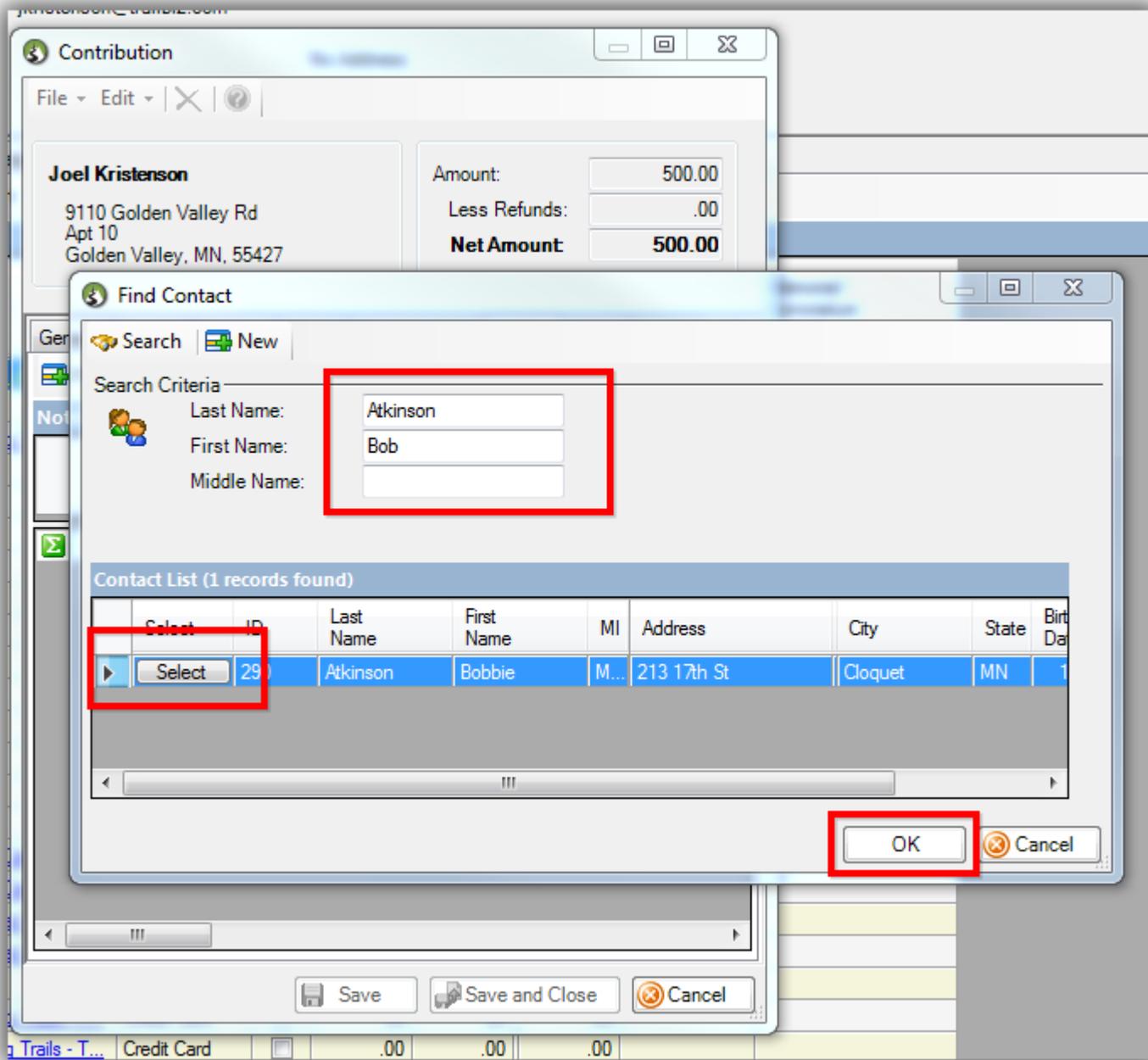
Contribution List (24 records found):

Incl	Open	Date	Amount After Refunds	Cycle	Event
✓	Open	8/5/2015	5,000.00	Calendar Year 2...	2011...
✓	Open	1/29/2015	25,000.00	Calendar Year 2...	
✓	Open	1/26/2015	2,565.00	Calendar Year 2...	Blazing
✓	Open	10/27/2014	100.00	Calendar Year 2...	
✓	Open	10/7/2014	1,750.25	Calendar Year 2...	
✓	Open	10/7/2014	50.00	Calendar Year 2...	
✓	Open	10/6/2014	10,000.00	Calendar Year 2...	
✓	Open	10/6/2014	5,000.00	Calendar Year 2...	
✓	Open	10/6/2014	123.45	Calendar Year 2...	
✓	Open	10/6/2014	1,234.56	Calendar Year 2...	
✓	Open	10/6/2014	123.45	Calendar Year 2...	
✓	Open	10/6/2014	123.45	Calendar Year 2...	
✓	Open	10/6/2014	25,000.00	Calendar Year 2...	
✓	Open	10/6/2014	25,000.00	Calendar Year 2...	
✓	Open	9/29/2014	5,000.00	Calendar Year 2...	
✓	Open	8/12/2014	2,965.00	Calendar Year 2...	2015 C...
✓	Open	8/12/2014	265.00	Calendar Year 2...	2015 C...
✓	Open	7/30/2014	50.00	Calendar Year 2...	Intema...
✓	Open	7/30/2014	65,000.25	Calendar Year 2...	Intema...
✓	Open	6/6/2014	68.25	Calendar Year 2...	
✓	Open	5/23/2014	2,308.50	Calendar Year 2...	Blazing
✓	Open	5/19/2014	2,308.50	Calendar Year 2...	Blazing

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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.*

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The screenshot shows the TrailBlazer software interface. In the background, a 'Contribution' window is open, displaying details for a contribution from Joel Kristenson for \$500.00. In the foreground, a 'Find Contact' dialog box is open. The 'Search Criteria' section has 'Last Name' set to 'Atkinson' and 'First Name' set to 'Bob'. Below this is a 'Contact List (1 records found)' table with one row highlighted. The 'OK' button at the bottom right of the dialog is also highlighted.

Contribution Window:

Joel Kristenson
9110 Golden Valley Rd
Apt 10
Golden Valley, MN, 55427

Amount: 500.00
Less Refunds: .00
Net Amount: 500.00

Find Contact Dialog:

Search Criteria:

- Last Name: Atkinson
- First Name: Bob
- Middle Name:

Contact List (1 records found)

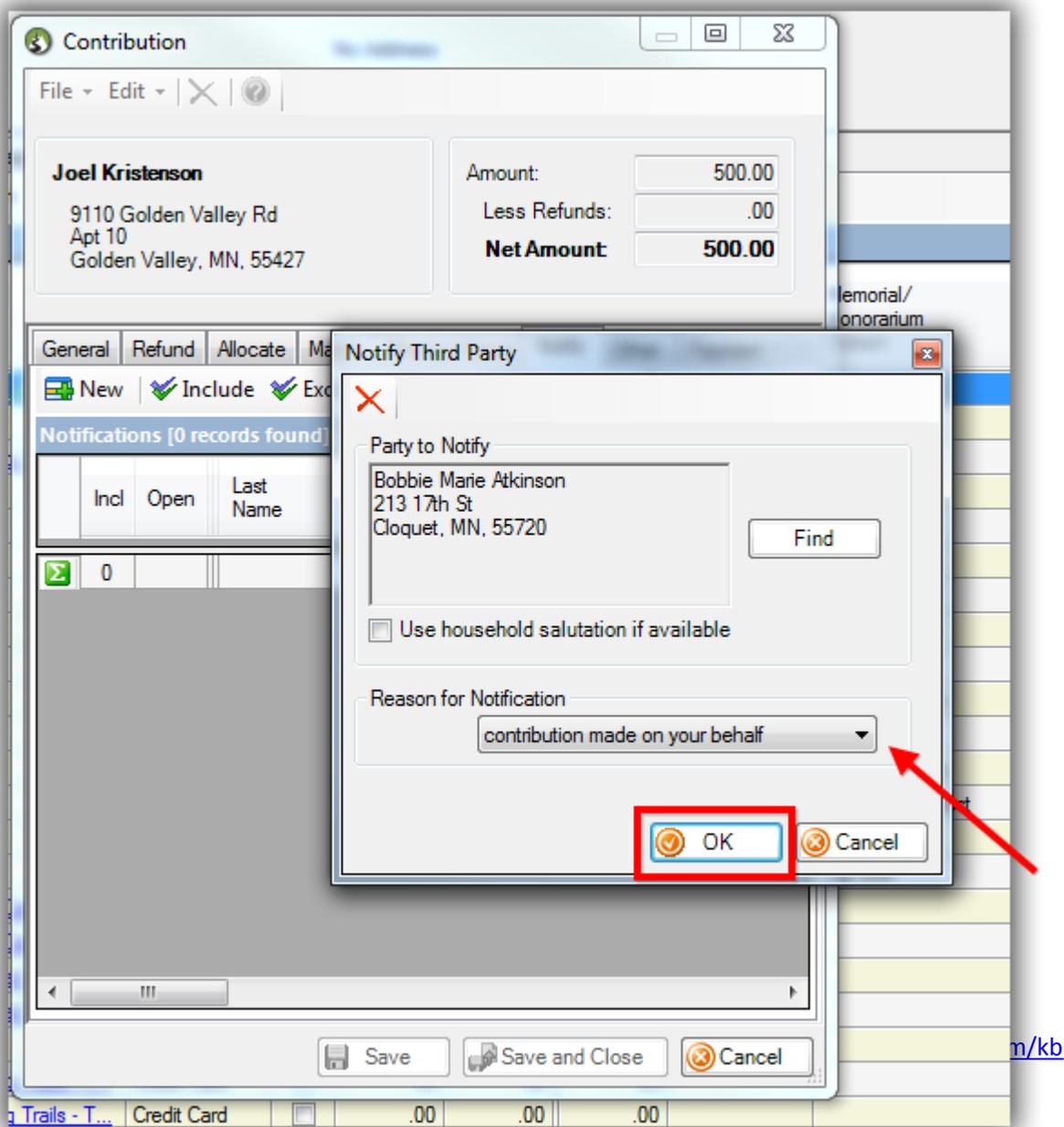
Select	ID	Last Name	First Name	MI	Address	City	State	Birth Date
Select	29	Atkinson	Bobbie	M...	213 17th St	Cloquet	MN	1

Buttons: OK, Cancel

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

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The screenshot displays the TrailBlazer software interface. The main window is titled "Contribution" and shows details for a contribution from Joel Kristenson. The amount is 500.00, with a net amount of 500.00 after less refunds of .00. The address is 9110 Golden Valley Rd, Apt 10, Golden Valley, MN, 55427. A "Notify Third Party" dialog box is open, showing the party to notify as Bobbie Marie Atkinson at 213 17th St, Cloquet, MN, 55720. The reason for notification is "contribution made on your behalf". The "OK" button is highlighted with a red box, and a red arrow points to the "Reason for Notification" dropdown menu.

Contribution Details:

Joel Kristenson	Amount:	500.00
9110 Golden Valley Rd	Less Refunds:	.00
Apt 10	Net Amount:	500.00
Golden Valley, MN, 55427		

Notify Third Party Dialog:

Party to Notify
Bobbie Marie Atkinson
213 17th St
Cloquet, MN, 55720

Use household salutation if available

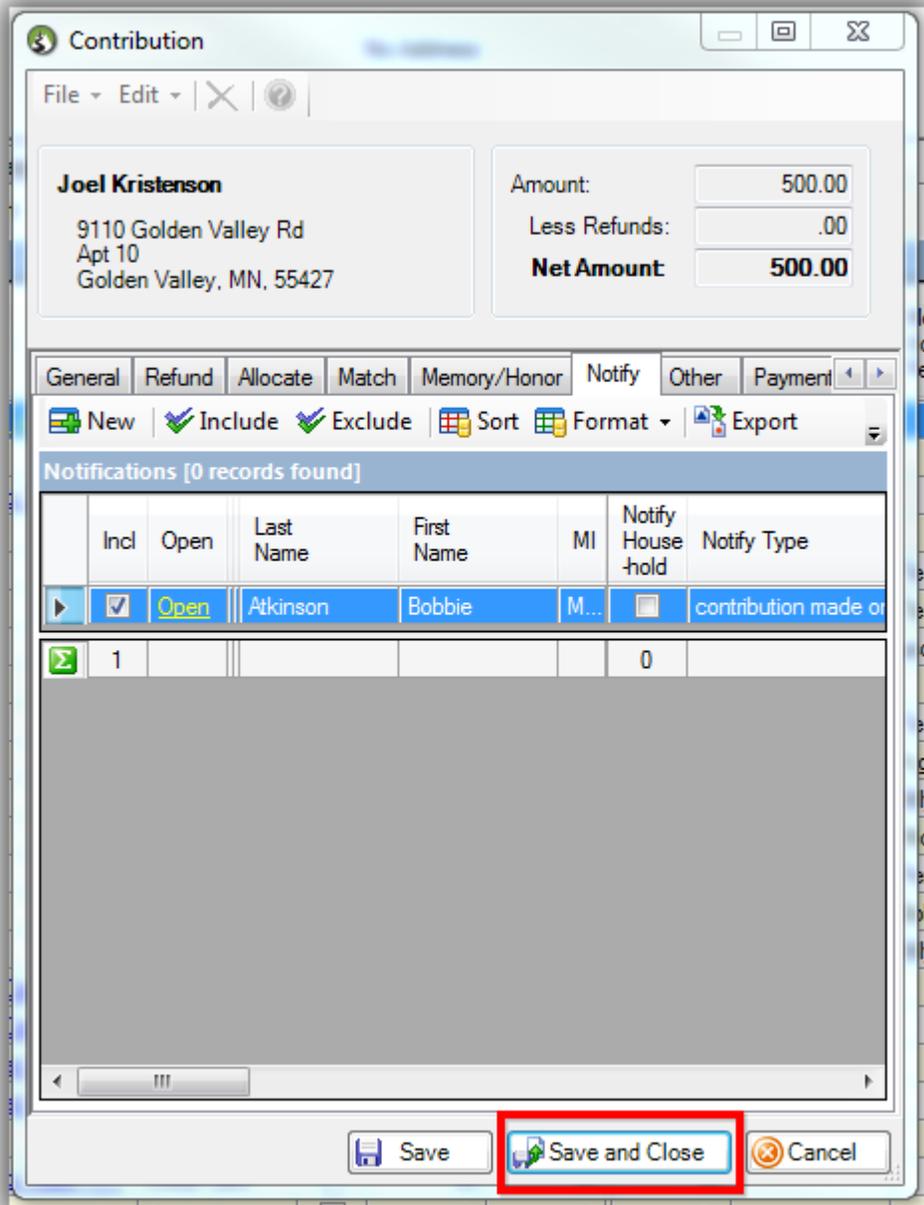
Reason for Notification
contribution made on your behalf

OK Cancel

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

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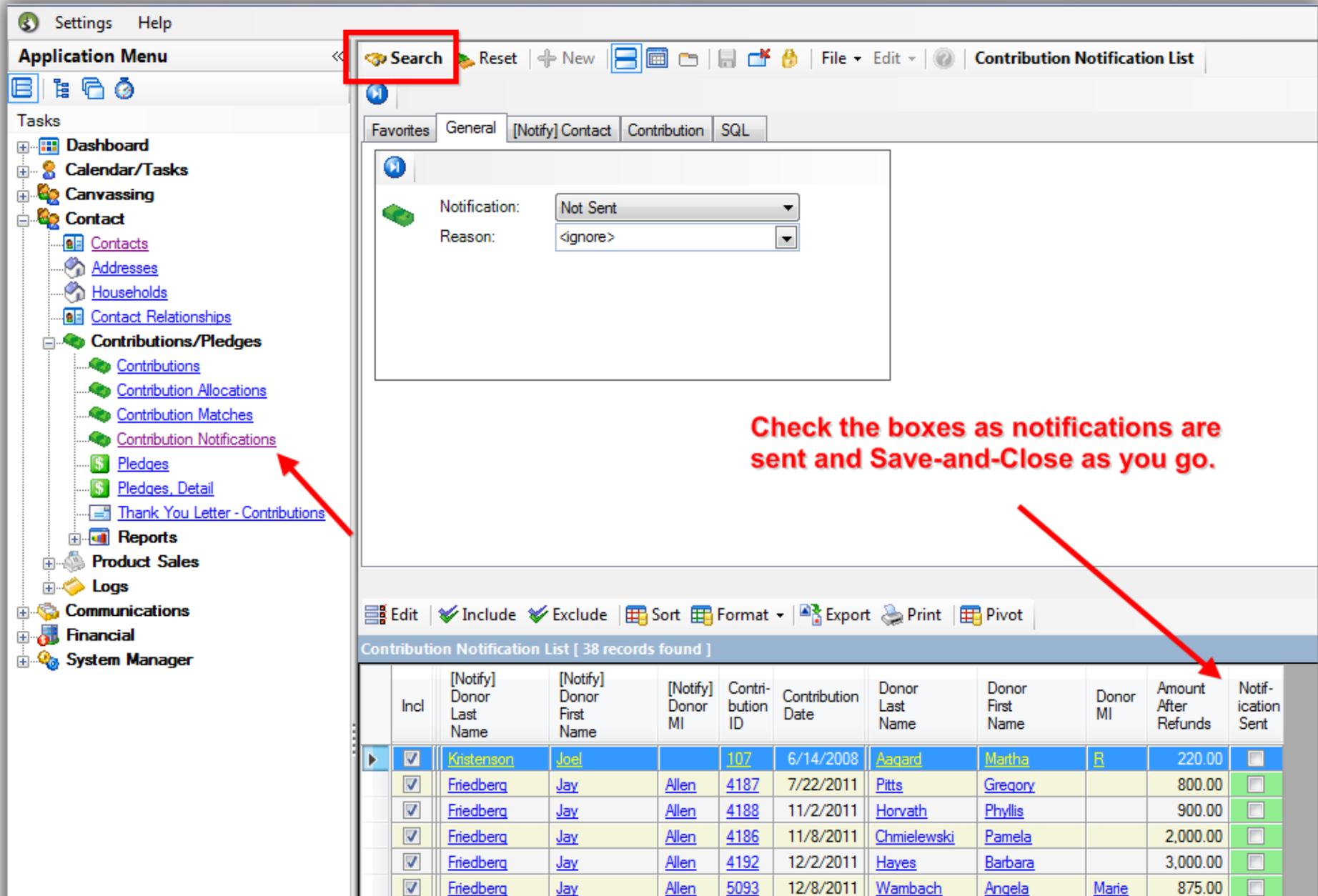


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That completes the steps to record the contribution, and the soft credit.

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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Search Reset + New [Icons] File Edit [?] Contribution Notification List

Tasks: Dashboard, Calendar/Tasks, Canvassing, Contact, Contributions/Pledges, Pledges, Reports, Product Sales, Logs, Communications, Financial, System Manager

Notification: Not Sent
Reason: <ignore>

Check the boxes as notifications are sent and Save-and-Close as you go.

Contribution Notification List [38 records found]

Incl	[Notify] Donor Last Name	[Notify] Donor First Name	[Notify] Donor MI	Contribution ID	Contribution Date	Donor Last Name	Donor First Name	Donor MI	Amount After Refunds	Notification Sent
<input checked="" type="checkbox"/>	Kristenson	Joel		107	6/14/2008	Aagard	Martha	R	220.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Friedberg	Jay	Allen	4187	7/22/2011	Pitts	Gregory		800.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Friedberg	Jay	Allen	4188	11/2/2011	Horvath	Phyllis		900.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Friedberg	Jay	Allen	4186	11/8/2011	Chmielewski	Pamela		2,000.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Friedberg	Jay	Allen	4192	12/2/2011	Hayes	Barbara		3,000.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Friedberg	Jay	Allen	5093	12/8/2011	Wambach	Angela	Marie	875.00	<input type="checkbox"/>

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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...**

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ons

Contribution Notification List [38 records found]

Incl	[Notify] Donor Last Name	[Notify] Donor First Name	[Notify] Donor MI	Contribution ID	Contribution Date	Donor Last Name	Donor First Name	Donor MI	Amount After Refunds	Notification Sent
<input checked="" type="checkbox"/>	Kristenson	Joel		107	6/14/2008	Aagard	Martha	R	220.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Friedberg	Jay	Allen	4187	7/22/2011	Pitts	Gregory		800.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Friedberg	Jay	Allen	4188	11/2/2011	Horvath	Phyllis		900.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Friedberg	Jay	Allen	4186	11/8/2011	Chmielewski	Pamela		2,000.00	<input type="checkbox"/>

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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.



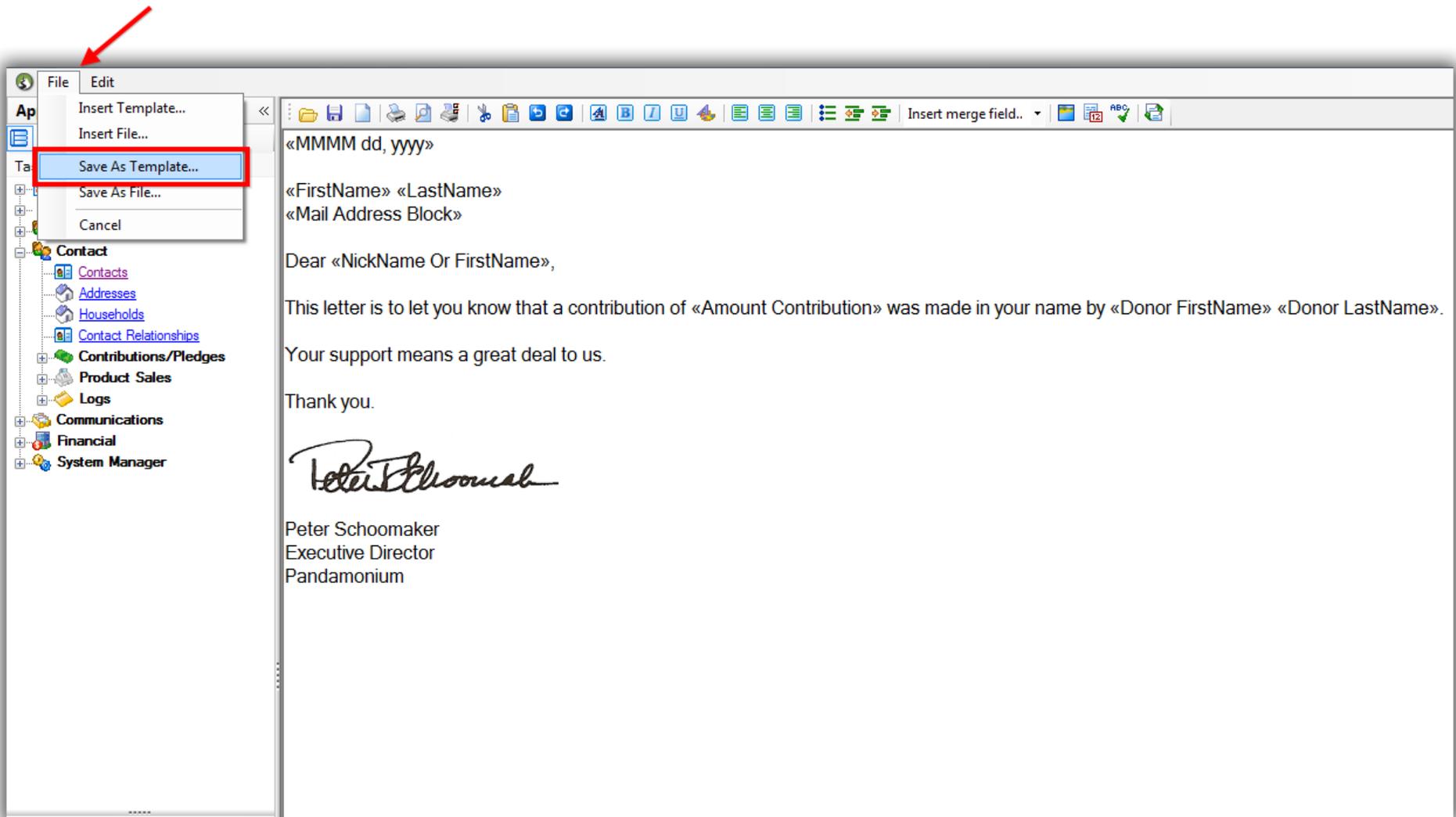
Peter Schoomaker
Executive Director
Pandamonium

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--- Copy Text Above This Line ---

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

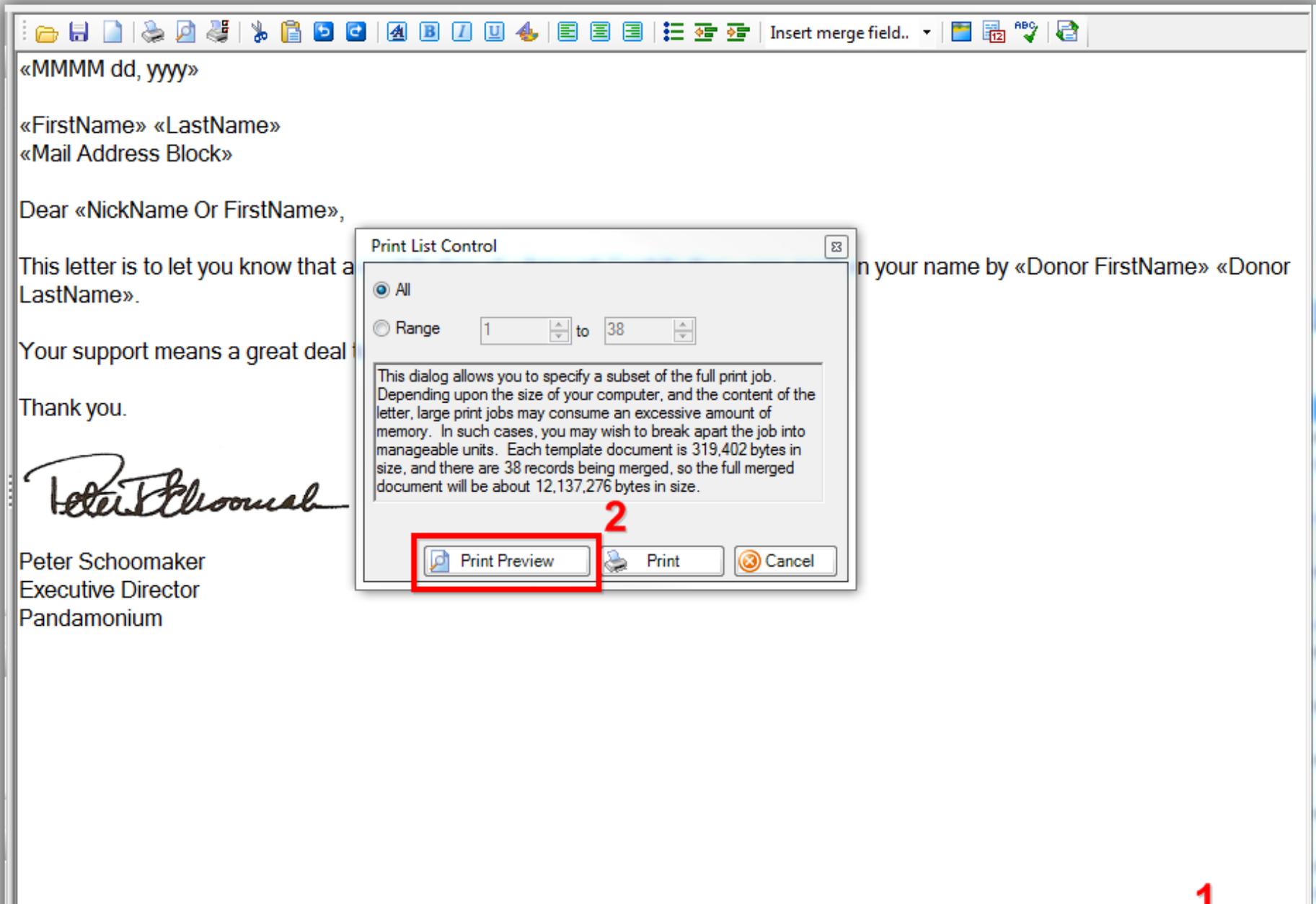
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Once you're ready to print or run a test print, click **[Print]** in the bottom-right, and then select **[Print Preview]**.

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The screenshot shows a mail merge software window with a letter template and a 'Print List Control' dialog box. The letter template contains the following text:

«MMMM dd, yyyy»

«FirstName» «LastName»
«Mail Address Block»

Dear «NickName Or FirstName»,

This letter is to let you know that a
LastName».

Your support means a great deal

Thank you.



Peter Schoomaker
Executive Director
Pandamonium

in your name by «Donor FirstName» «Donor

The 'Print List Control' dialog box is open, showing the following options:

- All
- Range: 1 to 38

The dialog box contains the following text:

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.

The 'Print Preview' button is highlighted with a red box and a red number '2' above it. The 'Print' button is highlighted with a red number '1' below it.

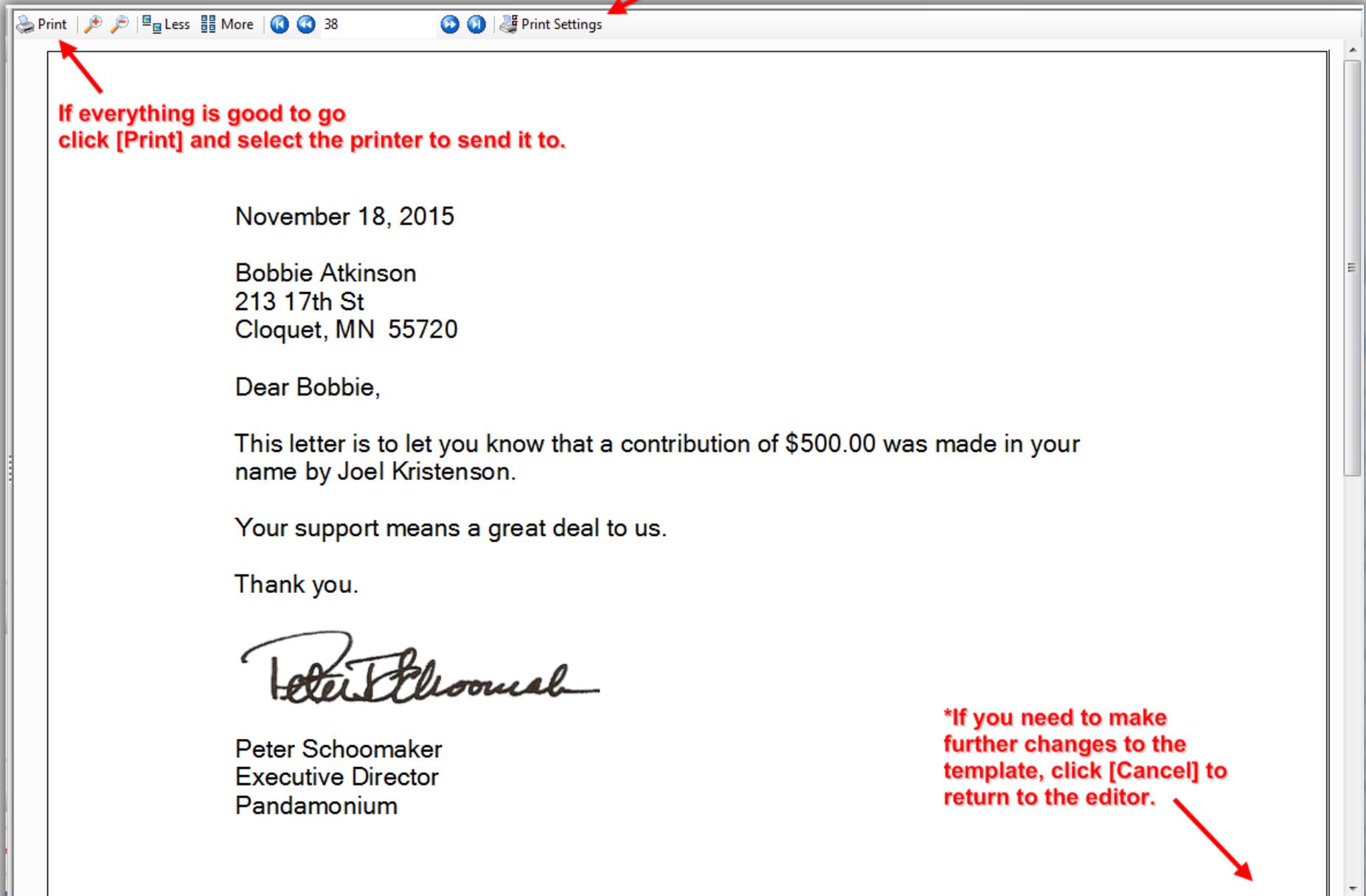
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 **Tip:** If you're running a test print set the range of pages to print to something like 1-5 so that you don't have to sit and wait for all the letter previews to load.

My example print preview is below:

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



If everything is good to go click [Print] and select the printer to send it to.

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

***If you need to make further changes to the template, click [Cancel] to return to the editor.**

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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.*

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Demo Nonprofit Joel - [Contribution Notification List]

Search Reset New [Icons] File Edit ? Contribution Notification List

Write Letter...
Set Notification Sent Flag...

Notification: Not Sent
Reason: <ignore>

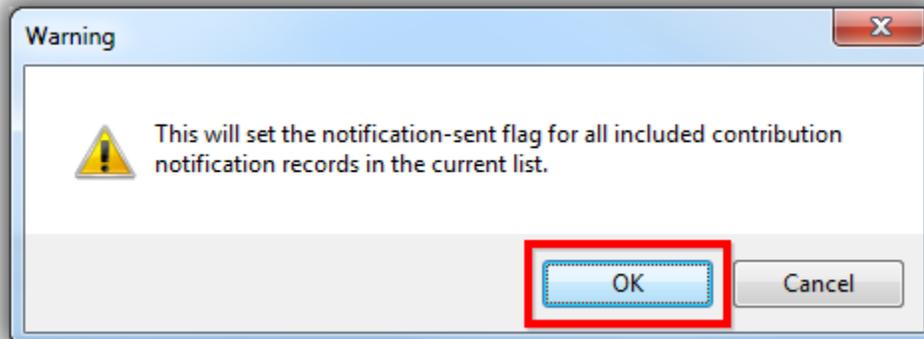
Edit Include Exclude Sort Format Export Print Pivot

Contribution Notification List [38 records found]

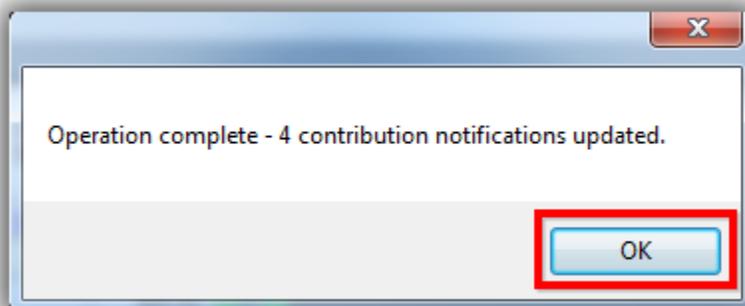
Incl	ID	[Notify] Donor ID	[Notify] Donor Last Name	[Notify] Donor First Name	[Notify] Donor MI	Contribution ID	Contribution Date	Donor Last Name	Donor First Name	Donor MI	Amount After Refunds	Notification Sent
<input checked="" type="checkbox"/>	80	290	Atkinson	Bobbie	Marie	5602	11/12/2015	Kristenson	Joel		500.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	79	12796	Kristenson	Joel		107	6/14/2008	Aagard	Martha	R	220.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	78	12812	Walters	Judy		5558	6/7/2012	Burton	Jane		695.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	76	8711	Walkem	Scott	Carol	5554	6/4/2012	Walkem	Judy		200.00	<input type="checkbox"/>

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Click **[OK]** to proceed.



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



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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.



Trail Blazer™

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

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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[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.*