

# How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only

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**Last Updated:** 2016-02-08

## Overview

This article is specific to **nonprofit** customers. It walks through the steps to search for donors to write a **year-end tax letter** to, how utilize the available contribution merge fields, and save the letter as a template. It also covers how to send the letter to households. The last section on mass updating the **tax deductible** amount for donations en masse (*fairly common task for nonprofit theater companies*).

 **Tip:** Make sure all of your database users who are performing data entry record the correct **tax deductible** amount on the donation and/or event sale so that the year-end letter is printed out accurately. If you have a need to mass update the tax deductible amount for list of donations, such as event sales, you can do that from the **File** drop-down menu in the **Contributions** list (*covered in section #3*).

## Outline

# How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only

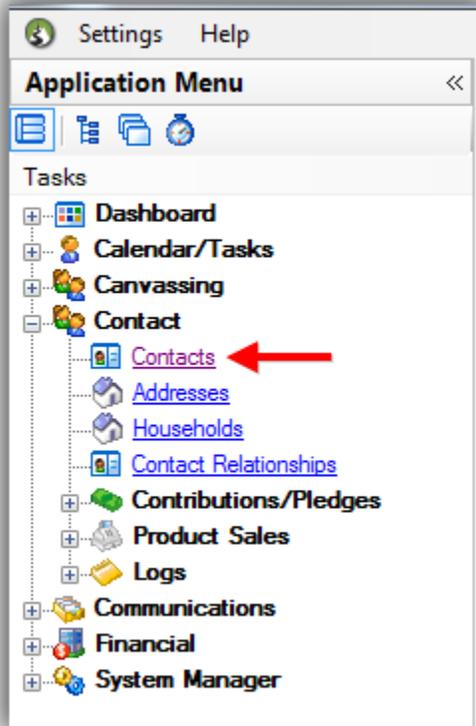
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- #1 Run your Search Query for Donors by Date Range, and Set your 'Date Range' Reporting Period
- #2 Write the YE Tax Letter to Individuals and Save the Letter Template
- #3 Mass Update the Tax Deductible Amount for Donations En Masse
- #4 Related Resources

## **#1 – Run your Search Query for Donors by Date Range, and Set your 'Date Range' Reporting Period**

Navigate to the Contacts (*Donors*) list.

## How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only



Run a [search query](#) for the list of people you're going to write the year-end tax letter to. *In this example I searched for all individual donors who gave in the calendar year 2015.*

# How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only

2

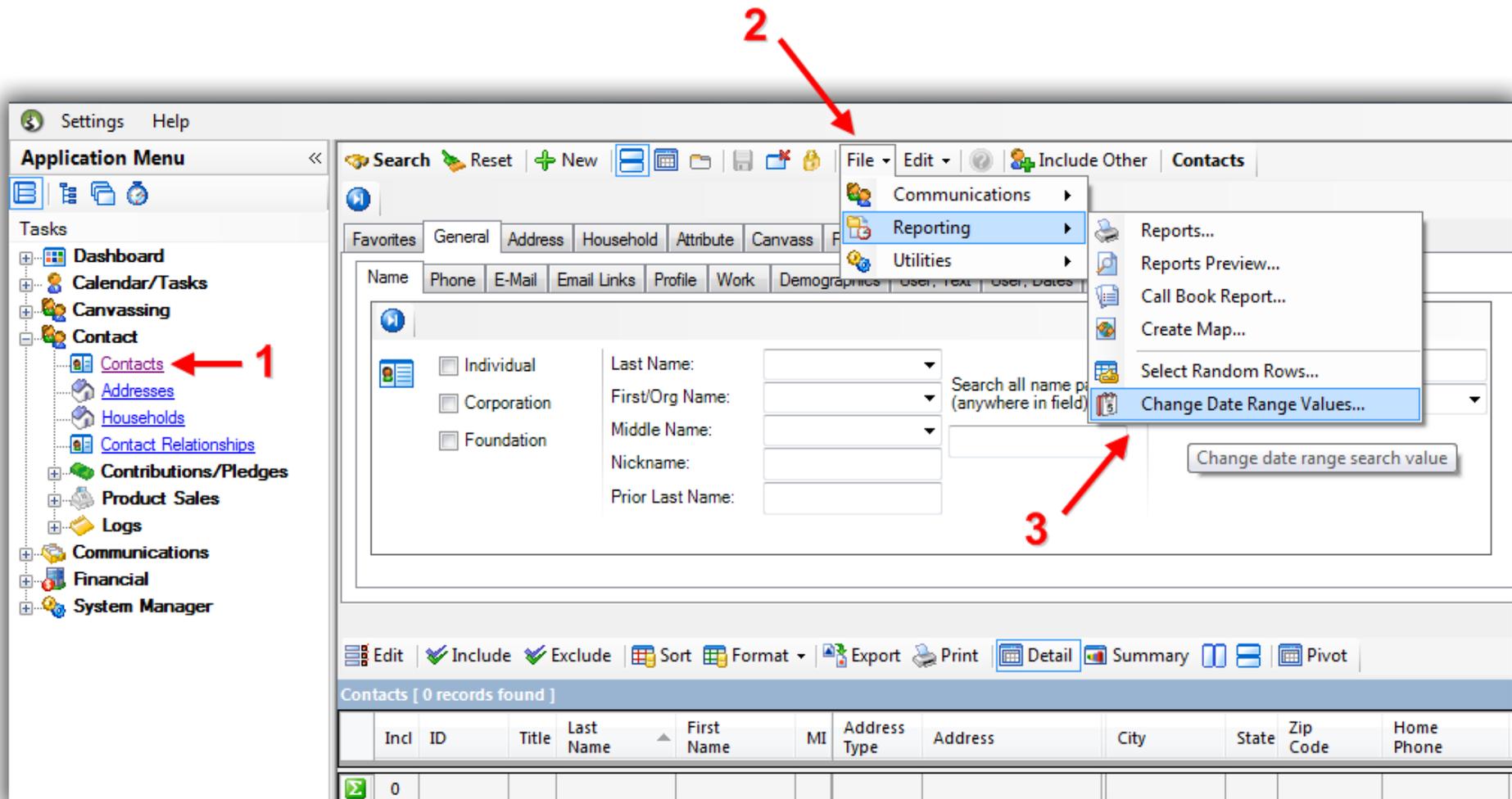
**1. Enter the date range for the time period you're writing the YE tax letter for.**

Incl	ID	Title	Last Name	First Name	MI	Address Type	Address	City	State	Zip Code	Home Phone	Email
<input checked="" type="checkbox"/>	11307	Ms.	Boudreau	Eileen	C	Home	585 Merrimack St	Lowell	MA	01854	(978) 746-7870	eileenb@boudreau.com
<input checked="" type="checkbox"/>	12759	Ms.	Collins	Brittany		Home	456 Oak St	Cincinnati	OH	45202	(321) 321-3213	brittany@aol.com
<input checked="" type="checkbox"/>	11075	Ms.	Gerdts	Amy		Home	1596 47th Ave S	Concordia	MO	64020	(321) 321-3213	Amy@Gerds.com

**Record count of donors who gave in this time period.**

Set the date range values by clicking **File > Reporting > Change Date Range Values...**

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Input the date range for the reporting period you're writing the letter for, and click **[OK]**. *I entered the same date range as I entered in the query 'calendar year 2015'.*

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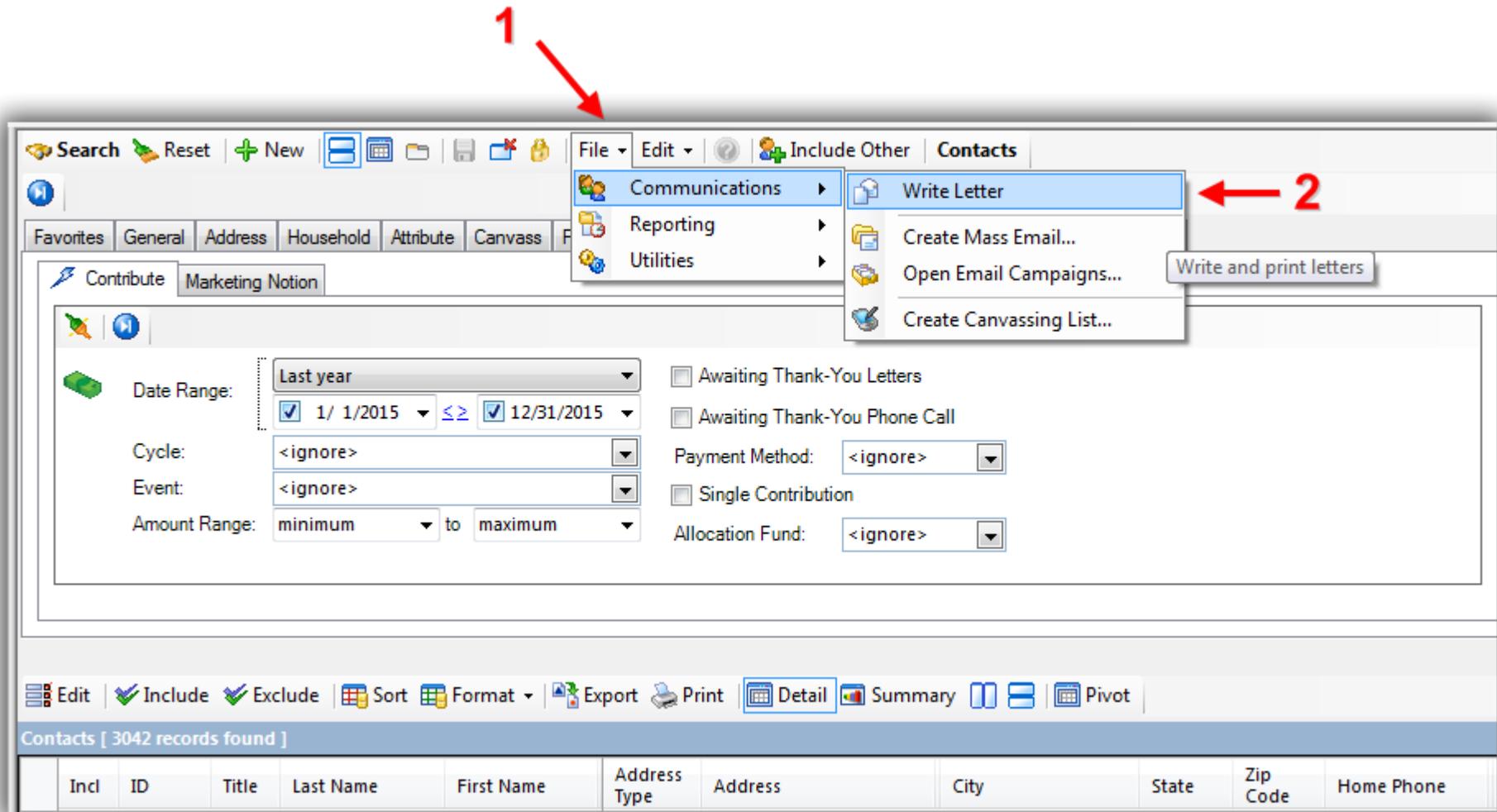
**Enter the date range to filter by for your YE tax letter.**



It's very **important** that you don't skip this step since this date range is what drives the **merge fields** when writing the letter.

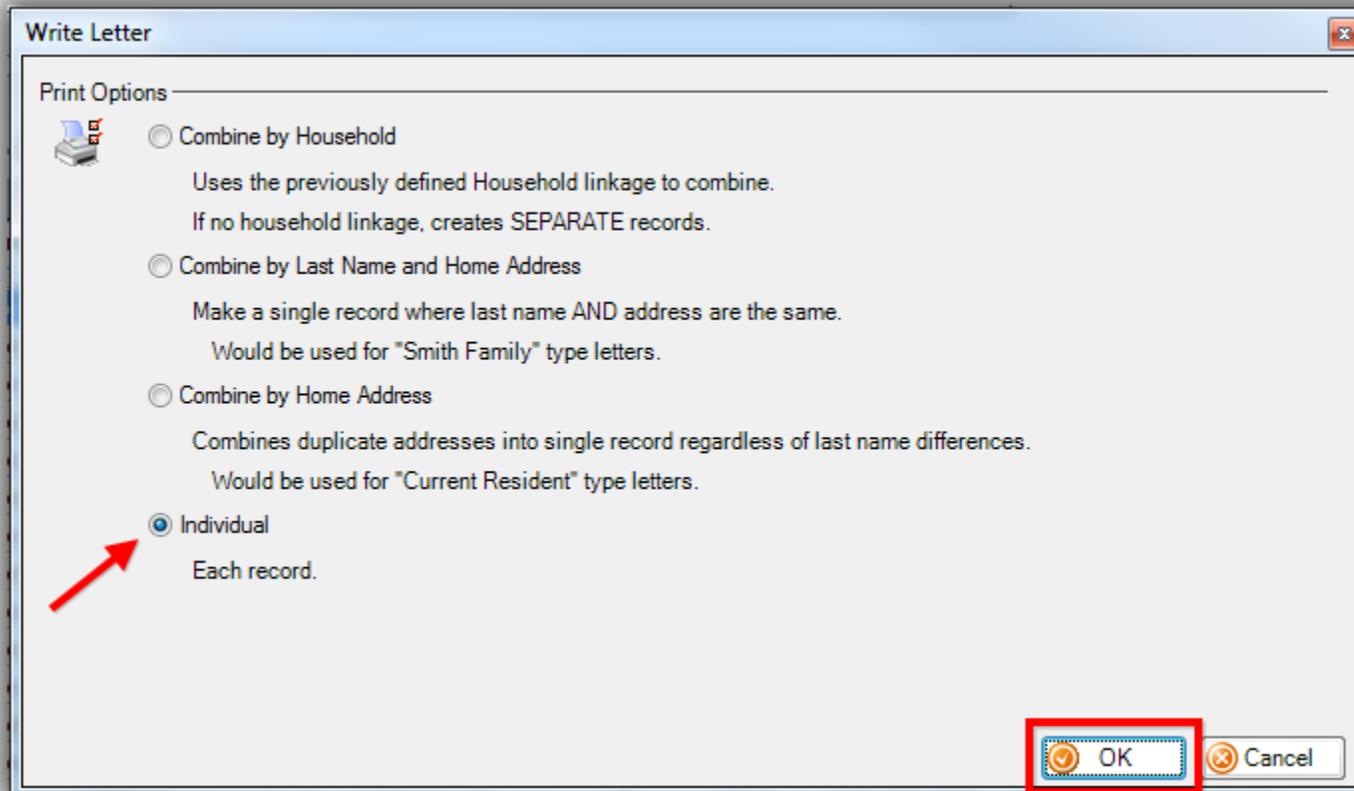
Next you'll open the word processor by following **File > Communications > Write Letter**

# How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only



Select the **Individual** radio button, and click [OK].

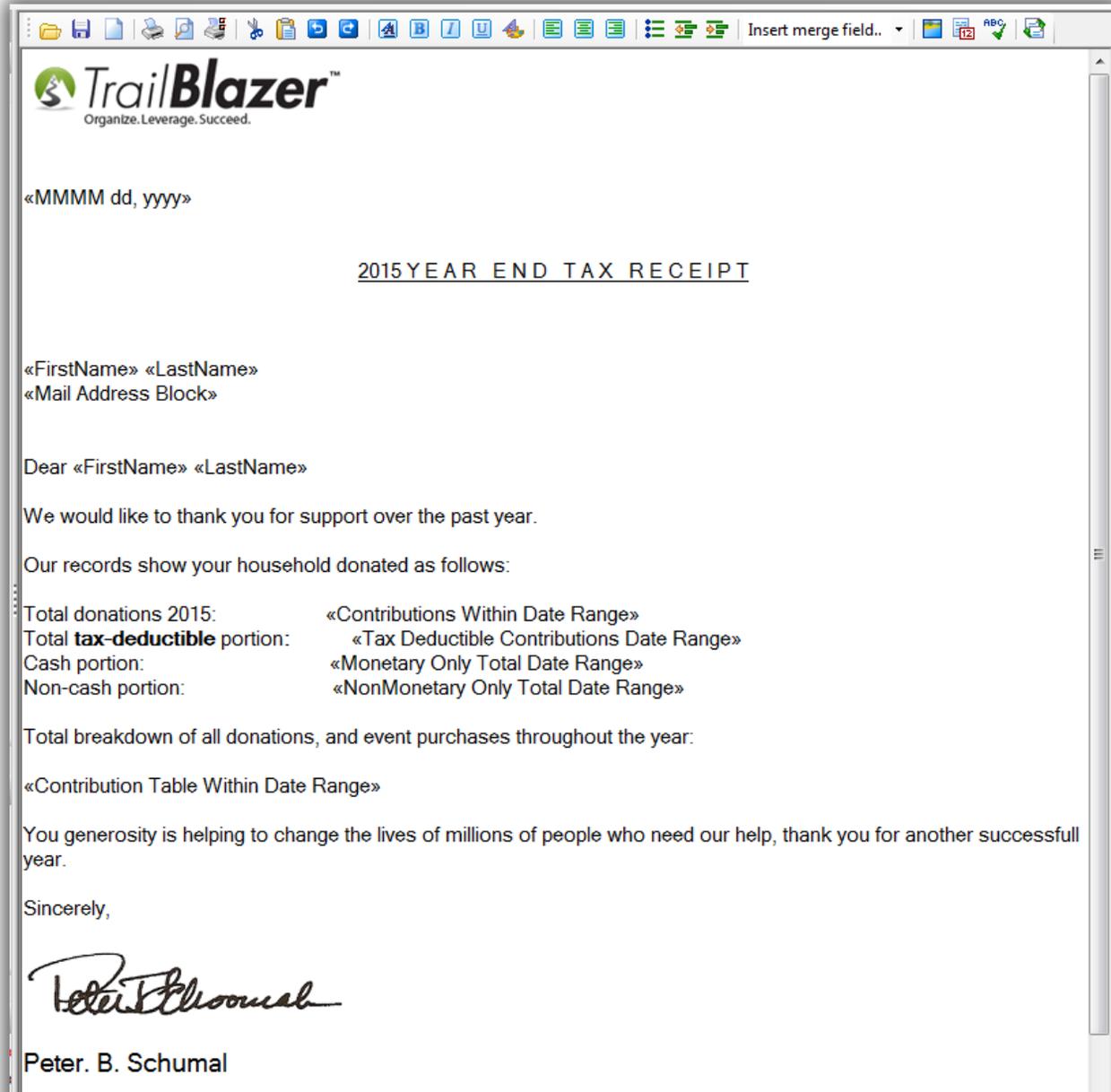
## How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only



Type out your letter OR copy-and-paste it from another location such as MS Word, Notepad, or Pages. You can copy and paste images (such as your logo, letterhead, or signature), and adjust the margins accordingly. *My finished example is below.*

# How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only

## Example YE Tax Letter.



«MMMM dd, yyyy»

2015 YEAR END TAX RECEIPT

«FirstName» «LastName»  
«Mail Address Block»

Dear «FirstName» «LastName»

We would like to thank you for support over the past year.

Our records show your household donated as follows:

Total donations 2015:	«Contributions Within Date Range»
Total <b>tax-deductible</b> portion:	«Tax Deductible Contributions Date Range»
Cash portion:	«Monetary Only Total Date Range»
Non-cash portion:	«NonMonetary Only Total Date Range»

Total breakdown of all donations, and event purchases throughout the year:

«Contribution Table Within Date Range»

You generosity is helping to change the lives of millions of people who need our help, thank you for another successful year.

Sincerely,



Peter. B. Schumal

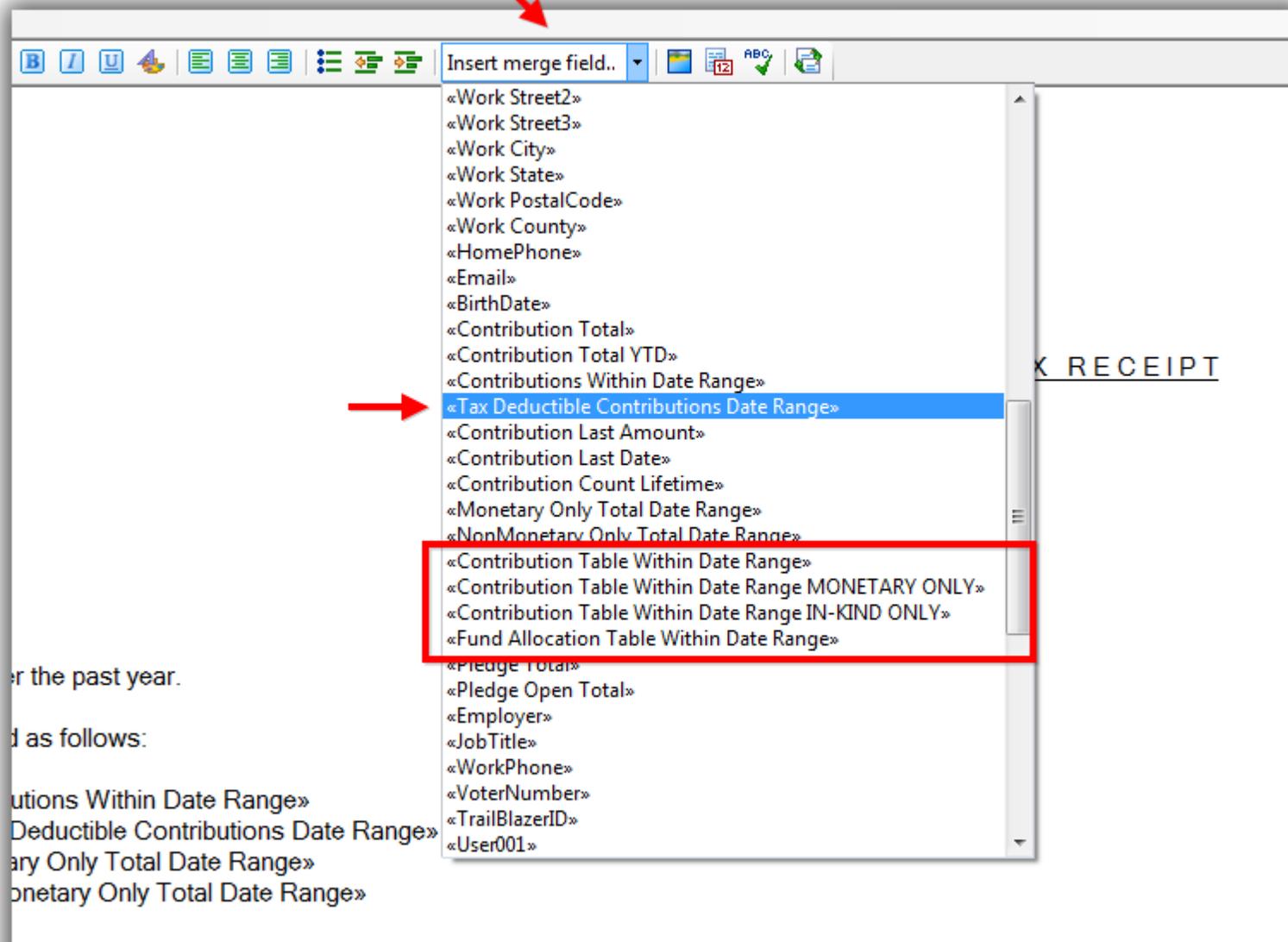
## How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only

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To insert the merge fields relevant to your tax letter click on the **Insert merge field..** drop-down in the upper-right of the rtf editor.

## How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only

**Insert merge fields i.e. Name, Address, Date, and Contributions Within Date Range..**



The screenshot shows a software interface with a list of merge fields. The list includes:

- «Work Street2»
- «Work Street3»
- «Work City»
- «Work State»
- «Work PostalCode»
- «Work County»
- «HomePhone»
- «Email»
- «BirthDate»
- «Contribution Total»
- «Contribution Total YTD»
- «Contributions Within Date Range»
- «Tax Deductible Contributions Date Range»
- «Contribution Last Amount»
- «Contribution Last Date»
- «Contribution Count Lifetime»
- «Monetary Only Total Date Range»
- «NonMonetary Only Total Date Range»
- «Contribution Table Within Date Range»
- «Contribution Table Within Date Range MONETARY ONLY»
- «Contribution Table Within Date Range IN-KIND ONLY»
- «Fund Allocation Table Within Date Range»
- «Pledge Total»
- «Pledge Open Total»
- «Employer»
- «JobTitle»
- «WorkPhone»
- «VoterNumber»
- «TrailBlazerID»
- «User001»

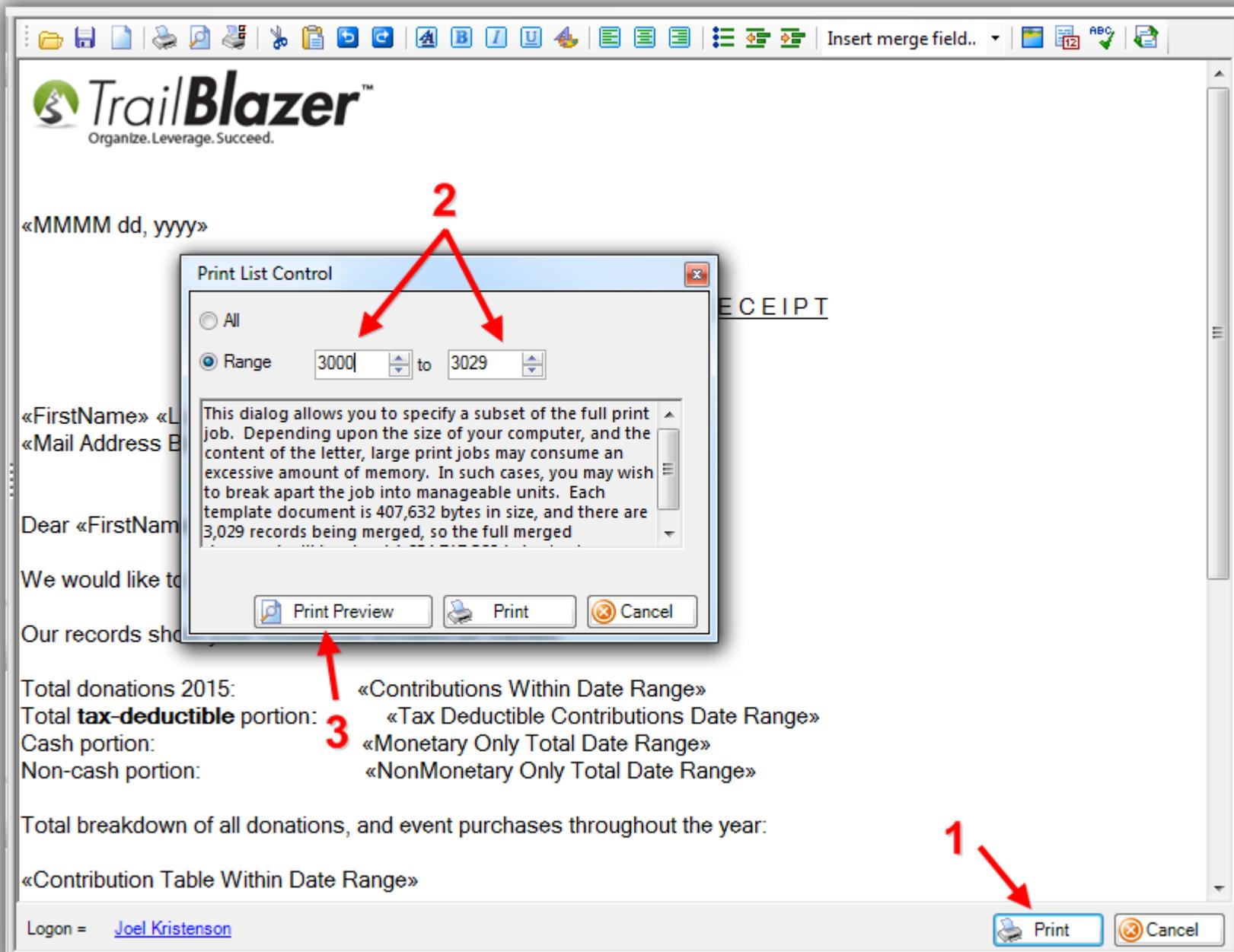
The text «Tax Deductible Contributions Date Range» is highlighted in blue. A red box highlights the group of fields from «Contribution Table Within Date Range» to «Fund Allocation Table Within Date Range». The text «K RECEIPT» is visible on the right side of the interface.

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To run a test print, click **[Print]** in the bottom right, set your range, and click **[Print Preview]**.

# How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only



«MMMM dd, yyyy»

«FirstName» «L

«Mail Address B

Dear «FirstName

We would like to

Our records sho

Total donations 2015: «Contributions Within Date Range»

Total **tax-deductible** portion: «Tax Deductible Contributions Date Range»

Cash portion: «Monetary Only Total Date Range»

Non-cash portion: «NonMonetary Only Total Date Range»

Total breakdown of all donations, and event purchases throughout the year:

«Contribution Table Within Date Range»

Logon = [Joel Kristenson](#)

RECEIPT

Print

Cancel

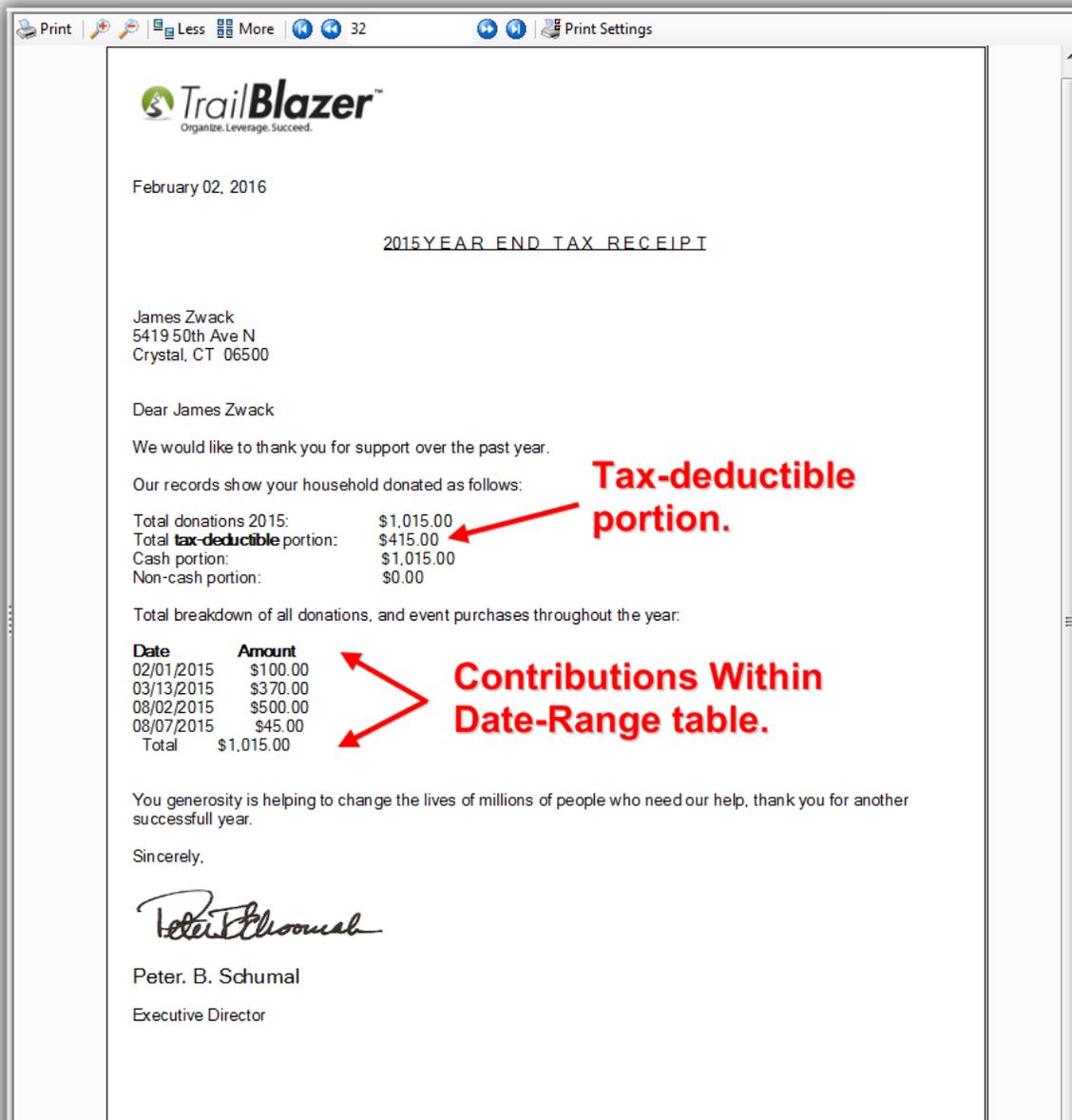
## How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only

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My *example* print preview is below for a donor name “James Zwack” who gave multiple times throughout the year AND had a different ‘tax-deductible’ amount since they paid for both event tickets AND provided tax-deductible donations. *This can be a very common occurrence and it’s critical that you track the tax-deductible amount for event sales and general donations carefully.*

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**Example print preview of a year-end tax letter with different tax-deductible, and non tax-deductible amounts.**



Print | Less | More | 32 | Print Settings

 Organize. Leverage. Succeed.

February 02, 2016

2015 YEAR END TAX RECEIPT

James Zwack  
5419 50th Ave N  
Crystal, CT 06500

Dear James Zwack

We would like to thank you for support over the past year.

Our records show your household donated as follows:

Total donations 2015:	\$1,015.00
Total <del>tax-deductible</del> portion:	\$415.00
Cash portion:	\$1,015.00
Non-cash portion:	\$0.00

Total breakdown of all donations, and event purchases throughout the year:

Date	Amount
02/01/2015	\$100.00
03/13/2015	\$370.00
08/02/2015	\$500.00
08/07/2015	\$45.00
Total	\$1,015.00

You generosity is helping to change the lives of millions of people who need our help, thank you for another successful year.

Sincerely,



Peter. B. Schumal  
Executive Director

**Tax-deductible portion.**

**Contributions Within Date-Range table.**

kb

## How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only

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 **Tip:** You'll notice in the *image above* that the '*contributions table*' merge field doesn't align vertically because it's not a fixed-width font by default. You can change just that table to either **Courier** or **Lucida Console** to make it consistent. *Ex:*

## How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only

Dear James Zwack,

We would like to thank you for support over the past year.

Our records show your household donated as follows:

Total donations 2015:	\$1,015.00
Total <b>tax-deductible</b> portion:	\$415.00
Cash portion:	\$1,015.00
Non-cash portion:	\$0.00

Total breakdown of all donations, and event purchases throughout the year:

<u>Date</u>	<u>Amount</u>
02/01/2015	\$100.00
03/13/2015	\$370.00
08/02/2015	\$500.00
08/07/2015	\$45.00
Total	\$1,015.00

**Change this font to something like Lucida Console or Courier New so the columns line up correctly.**



Your generosity is helping to change the lives of millions of people who need our successfull year.

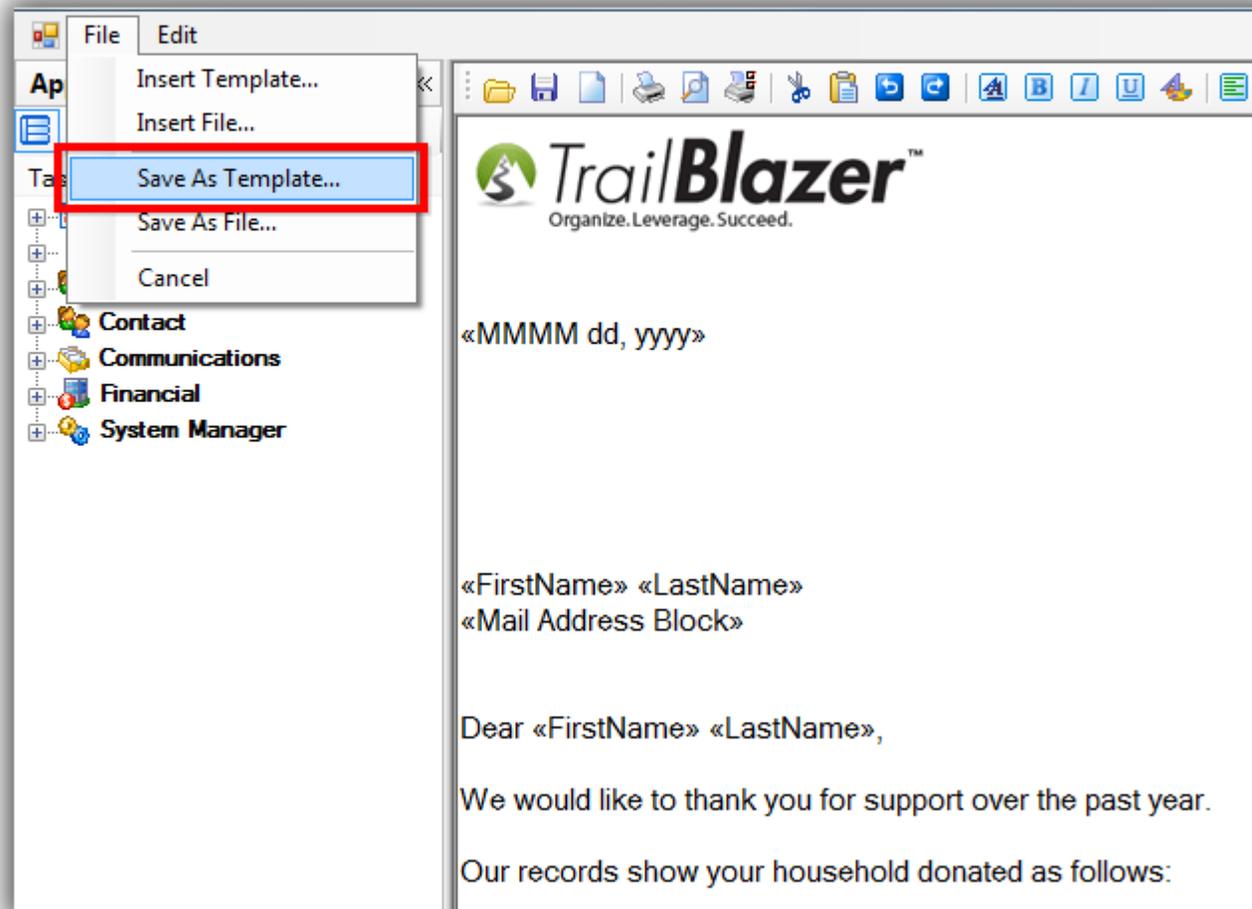
Sincerely,

## How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only

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When you're finished creating and testing the letter, click the **File** drop-down in the very upper-left of the screen and select **Save as a Template...**

**Click the File drop-down to save as a template in the 'cloud'.**



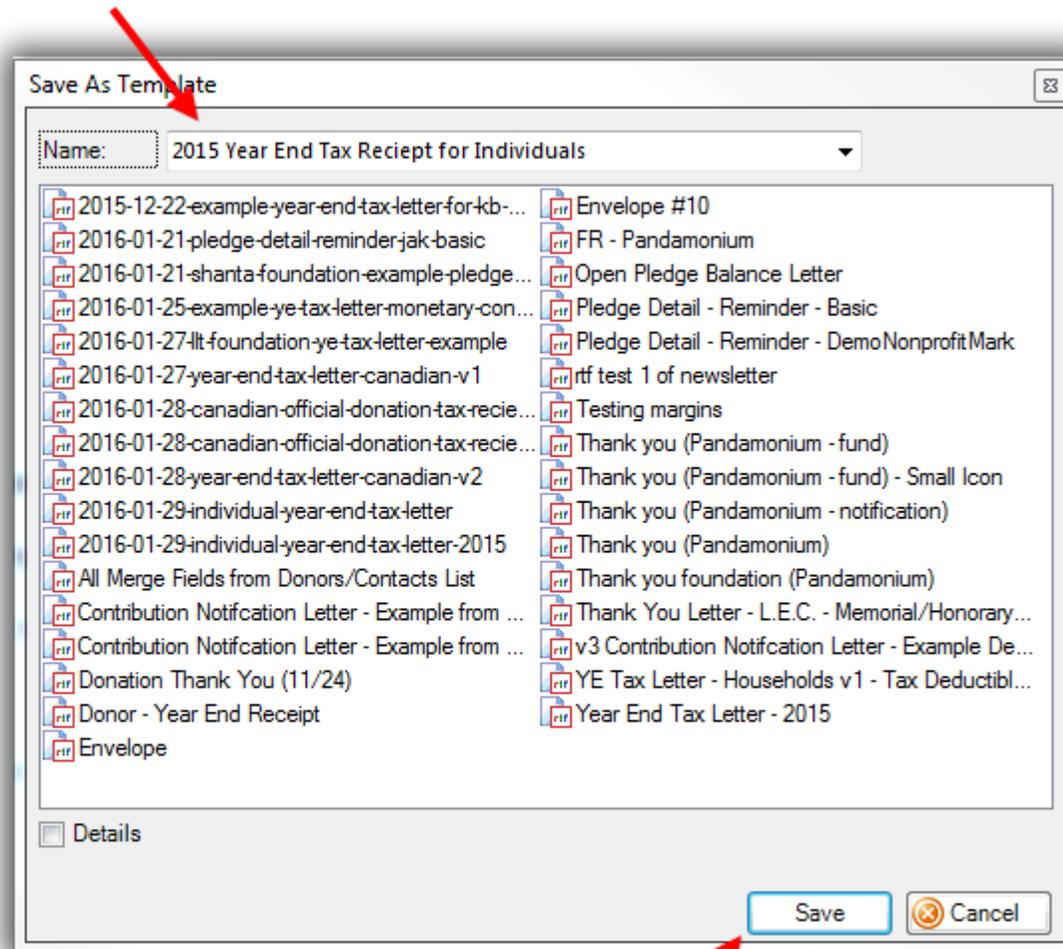
## How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only

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Give the template a recognizable **name**, then click **[Save]**. *In my example I called my template “**Year End Tax Letter - 2015**”, it’s very possible you will have a separate template for Households, Corporations, etc.*

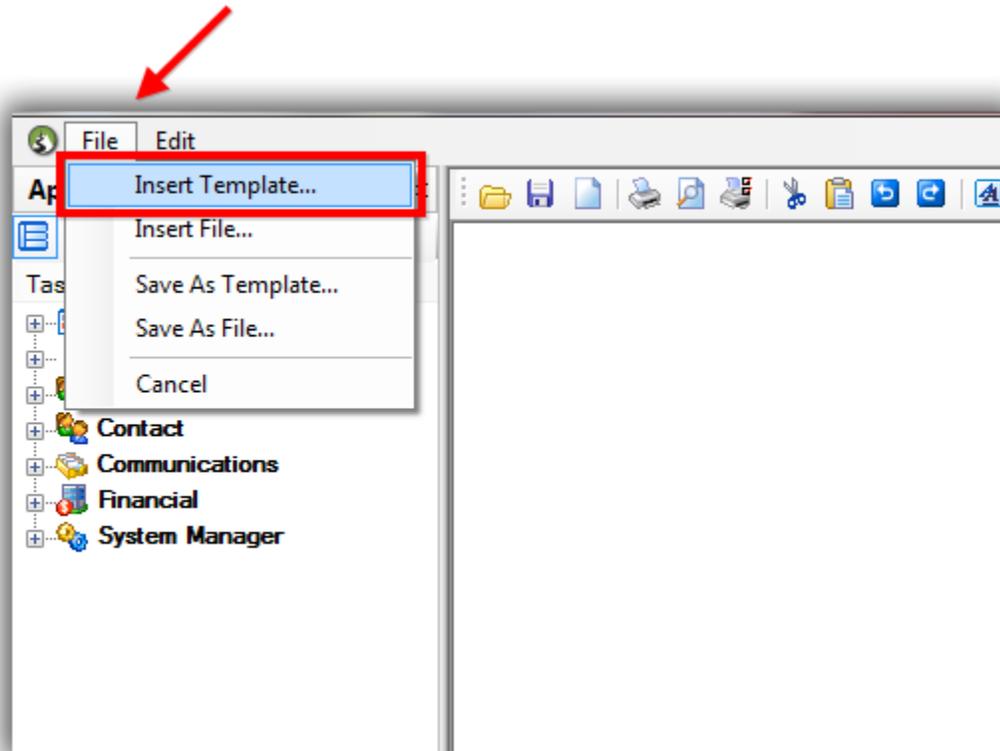
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## 1. Create a name for your letter template.



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The next time you need to insert a template you'll open the word processor, and click **File > Insert Template**



When you're finished with this task you should mass update the list of contacts [with an attribute](#) and [mass apply a log note](#) to them so you can efficiently track who's received what mailings.

## #2 – Writing the Year-End Tax Letter to Households

Prior to writing the letter to an entire household you'll need to run the [householding utility](#) on your entire database. This will ensure that the merge fields you can use for Household Envelope or Salutation Name work properly, and so that people who are living at the same home address only receive a single letter.

From the Contacts (*Donors*) list run a search query for the list of people you're writing the year-end letter to. *In my example I searched for all 'individual' donors who gave within the calendar year 2015, it produced **3,029** results.*

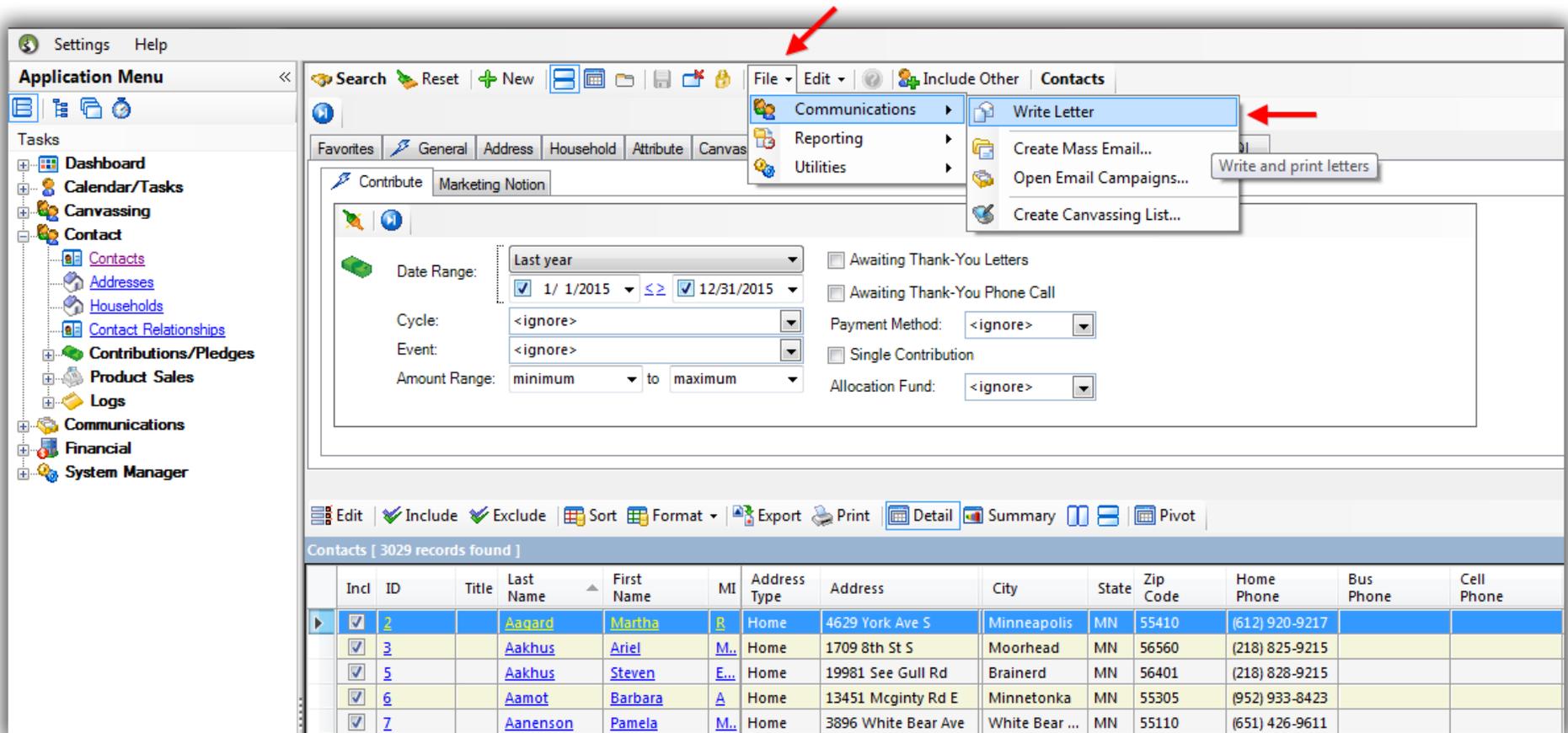
# How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only

The screenshot shows the TrailBlazer software interface. On the left is the 'Application Menu' with a tree view of tasks including 'Contacts'. A red arrow labeled '1' points to 'Contacts'. The main window shows search filters for 'Contribute' with a date range of 'Last year' (1/1/2015 to 12/31/2015). A red arrow labeled '2' points to these filters, and another red arrow labeled '3' points to the search button. Below the filters is a table of contacts with columns for ID, Last Name, First Name, MI, Address Type, Address, Address Line 2, City, State, Zip Code, Home Phone, and Email.

Incl	ID	Last Name	First Name	MI	Address Type	Address	Address Line 2	City	State	Zip Code	Home Phone	Email
<input checked="" type="checkbox"/>	2	Aagard	Martha	R	Home	4629 York Ave S		Minneapolis	MN	55410	(612) 920-9217	Martha@Aagard.com
<input checked="" type="checkbox"/>	3	Aakhus	Ariel	Marie	Home	1709 8th St S	Cpo 3010	Moorhead	MN	56560	(218) 825-9215	Ariel@Aakhusxxx.com
<input checked="" type="checkbox"/>	5	Aakhus	Steven	Eric	Home	19981 See Gull Rd		Brainerd	MN	56401	(218) 828-9215	Steven@Aakhus.com
<input checked="" type="checkbox"/>	6	Aamot	Barbara	A	Home	13451 Mcginty Rd E		Minnetonka	MN	55305	(952) 933-8423	Barbara@Aamot.com
<input checked="" type="checkbox"/>	7	Aanenson	Pamela	Marie	Home	3896 White Bear Ave		White Bear Lake	MN	55110	(651) 426-9611	Pamela@Aanenson.com

Open the word processor by following **File > Communications > Write Letter**

# How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only

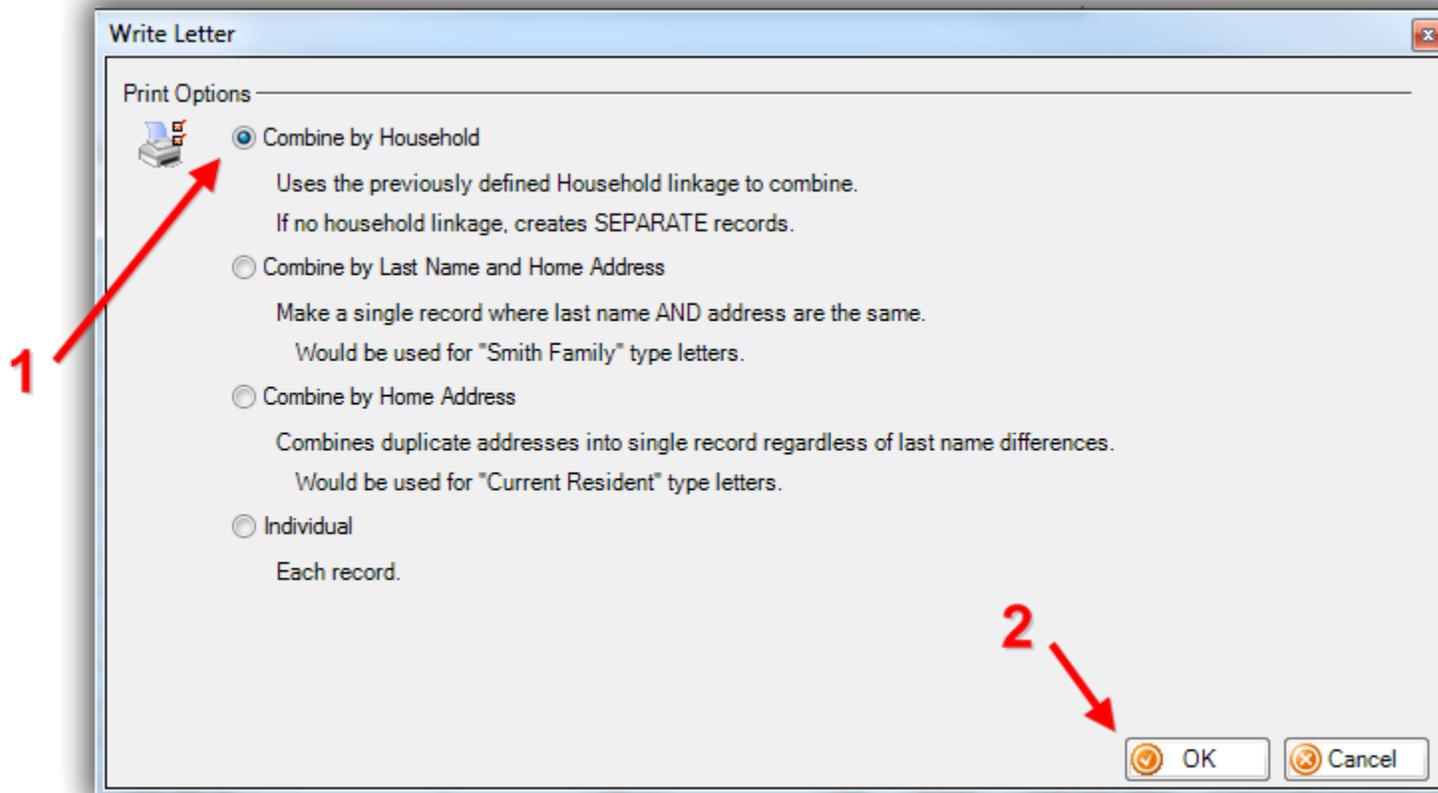


The screenshot shows the TrailBlazer software interface. The 'File' menu is open, and the 'Communications' dropdown is selected. The 'Write Letter' option is highlighted, and a tooltip 'Write and print letters' is visible. The interface also shows a 'Contacts' table with columns for ID, Title, Last Name, First Name, MI, Address Type, Address, City, State, Zip Code, Home Phone, Bus Phone, and Cell Phone. The table contains 5 rows of contact information.

Incl	ID	Title	Last Name	First Name	MI	Address Type	Address	City	State	Zip Code	Home Phone	Bus Phone	Cell Phone
<input checked="" type="checkbox"/>	2		Aagard	Martha	B	Home	4629 York Ave S	Minneapolis	MN	55410	(612) 920-9217		
<input checked="" type="checkbox"/>	3		Aakhus	Ariel	M.	Home	1709 8th St S	Moorhead	MN	56560	(218) 825-9215		
<input checked="" type="checkbox"/>	5		Aakhus	Steven	E...	Home	19981 See Gull Rd	Brainerd	MN	56401	(218) 828-9215		
<input checked="" type="checkbox"/>	6		Aamot	Barbara	A	Home	13451 Mcginty Rd E	Minnetonka	MN	55305	(952) 933-8423		
<input checked="" type="checkbox"/>	7		Aanenson	Pamela	M.	Home	3896 White Bear Ave	White Bear ...	MN	55110	(651) 426-9611		

Select the option to write the letter to **households**, it will be the first radio button in the list, then click **[OK]**.

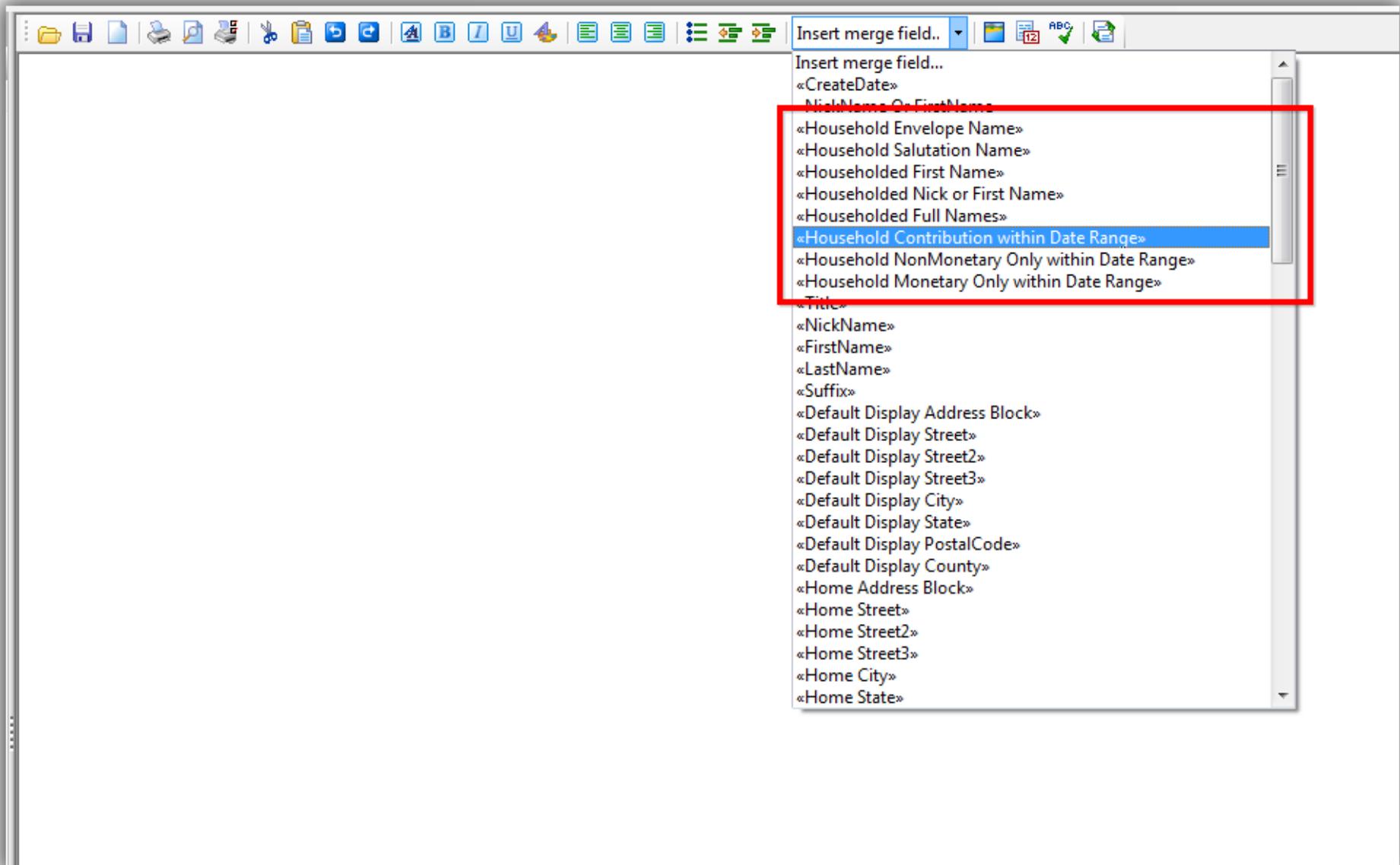
## How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only



It will take a minute to load as the mail-merge word processor prepares to send to households.

As of the time this article was written, these are the household merge fields you can utilize for this letter:

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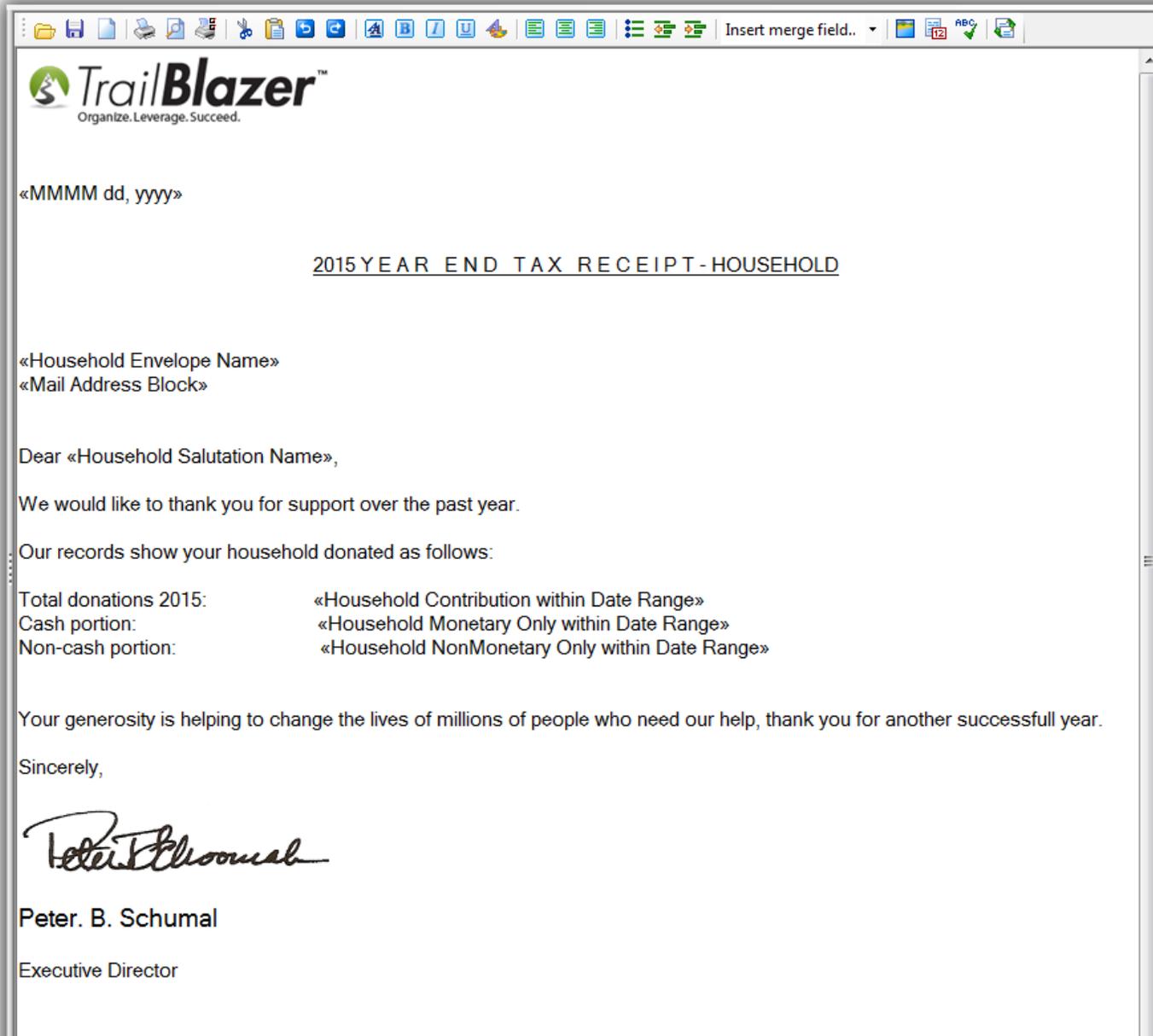


## How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only

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Create your letter template by adding in text, images, your signature, and the **household merge fields**. For the most part you can copy-and-paste this from another program like Microsoft Word or Pages, but keep in mind that it's currently limited to a *single* column template. *My example is below.*

## Example year-end tax letter for households before print preview.



The screenshot shows a Microsoft Word document with the following content:

TrailBlazer™  
Organize. Leverage. Succeed.

«MMMM dd, yyyy»

2015 YEAR END TAX RECEIPT - HOUSEHOLD

«Household Envelope Name»  
«Mail Address Block»

Dear «Household Salutation Name»,

We would like to thank you for support over the past year.

Our records show your household donated as follows:

Total donations 2015:	«Household Contribution within Date Range»
Cash portion:	«Household Monetary Only within Date Range»
Non-cash portion:	«Household NonMonetary Only within Date Range»

Your generosity is helping to change the lives of millions of people who need our help, thank you for another successfull year.

Sincerely,



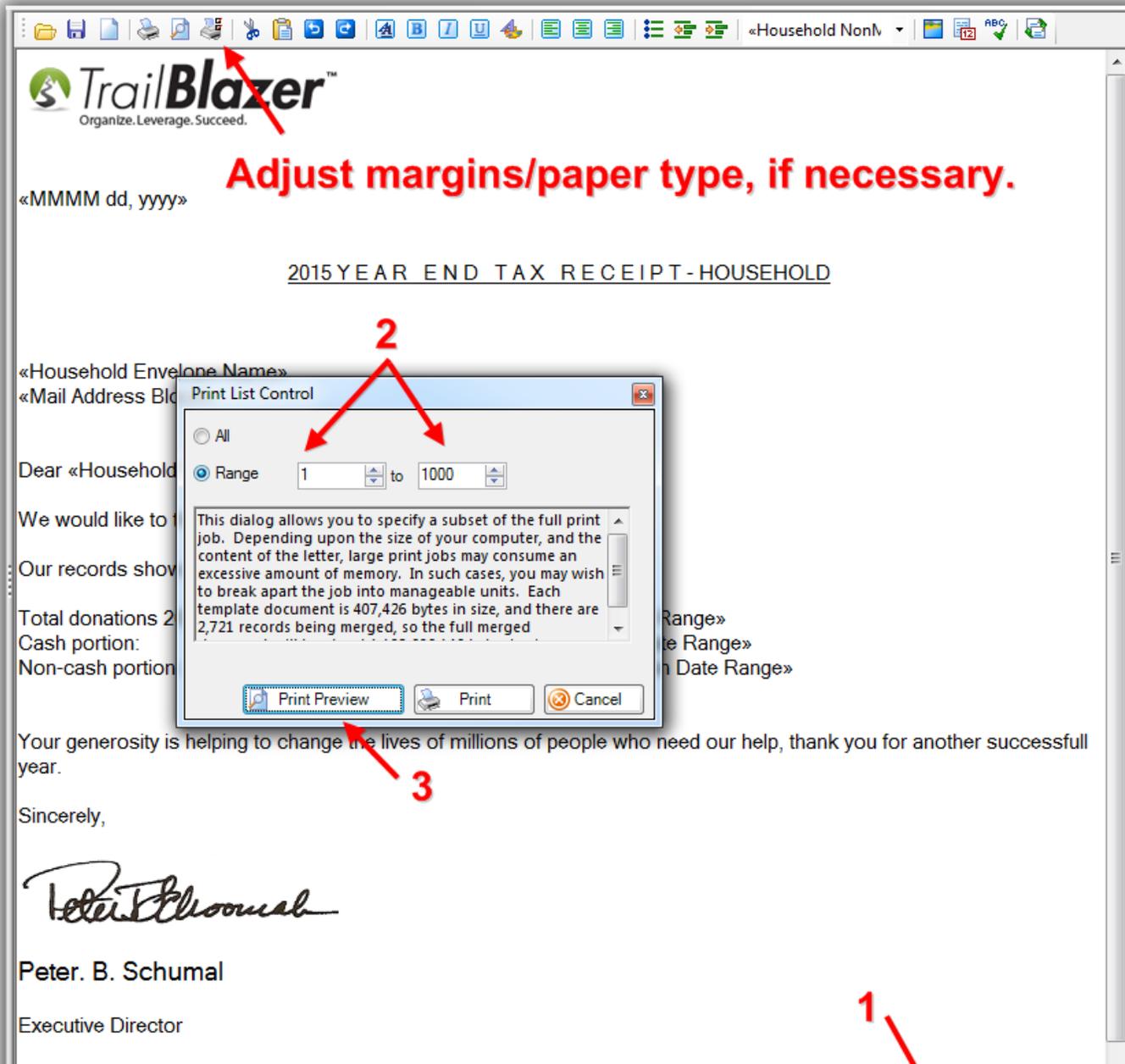
**Peter. B. Schumal**  
Executive Director

## How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only

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You can adjust the margins by clicking the **[Page Settings]** button on the top tool bar, then to run a print preview click **[Print]**, set your range, and click **[Print Preview]**.

# How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only



**Adjust margins/paper type, if necessary.**

«MMMM dd, yyyy»

2015 YEAR END TAX RECEIPT - HOUSEHOLD

«Household Envelope Name»  
«Mail Address Block»

Dear «Household Name»

We would like to thank you for your generous contribution to our organization.

Our records show that you have contributed the following:

Total donations 2015: \$1,000.00  
Cash portion: \$1,000.00  
Non-cash portion: \$0.00

Your generosity is helping to change the lives of millions of people who need our help, thank you for another successful year.

Sincerely,



Peter B. Schumal  
Executive Director

**1**

**2**

**3**

Print List Control

All

Range 1 to 1000

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 407,426 bytes in size, and there are 2,721 records being merged, so the full merged job would be 1,172,000 bytes in size.

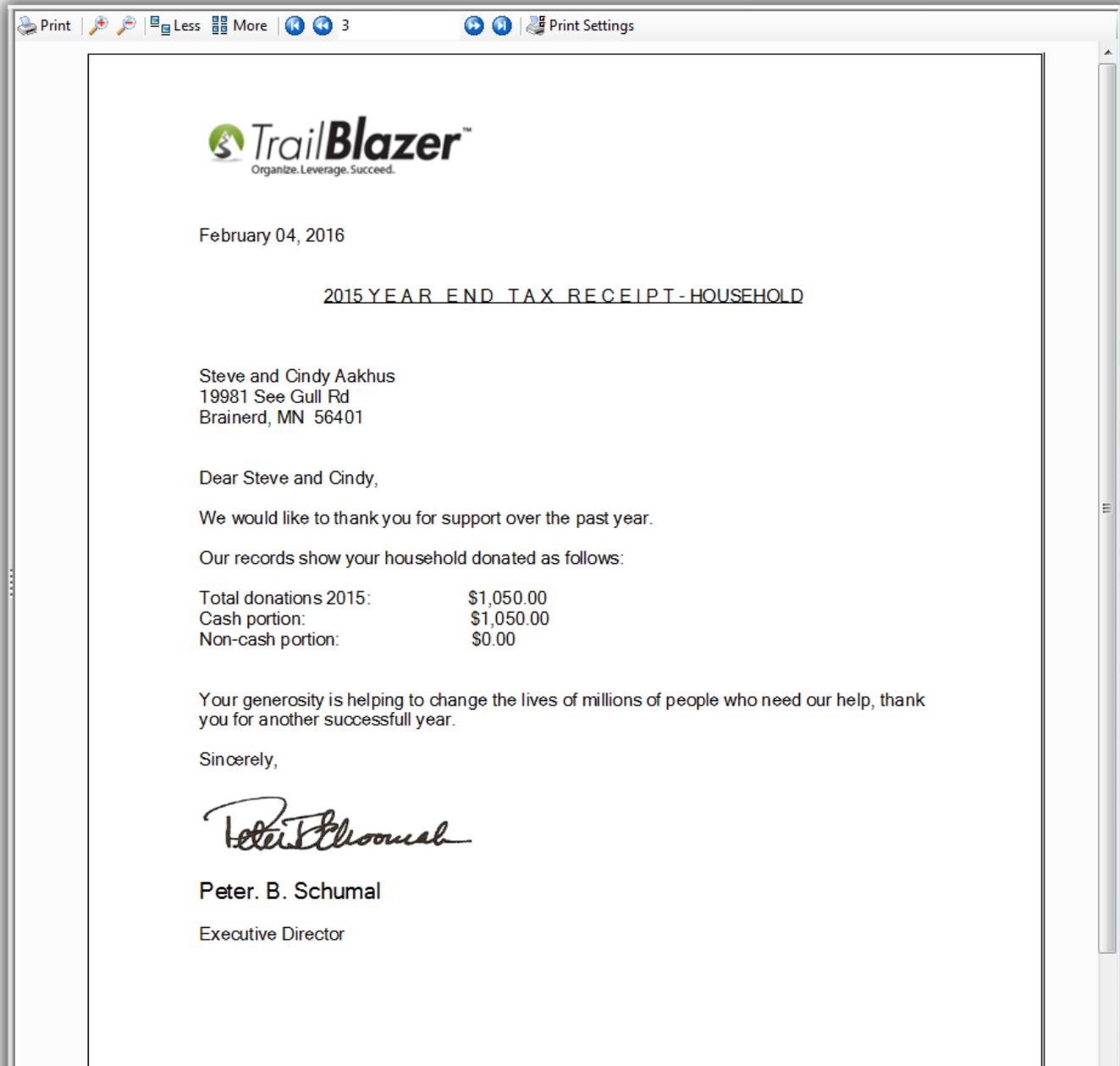
Print Preview Print Cancel

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My finished *example* is below of a family where multiple people donated throughout the year.

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## How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only

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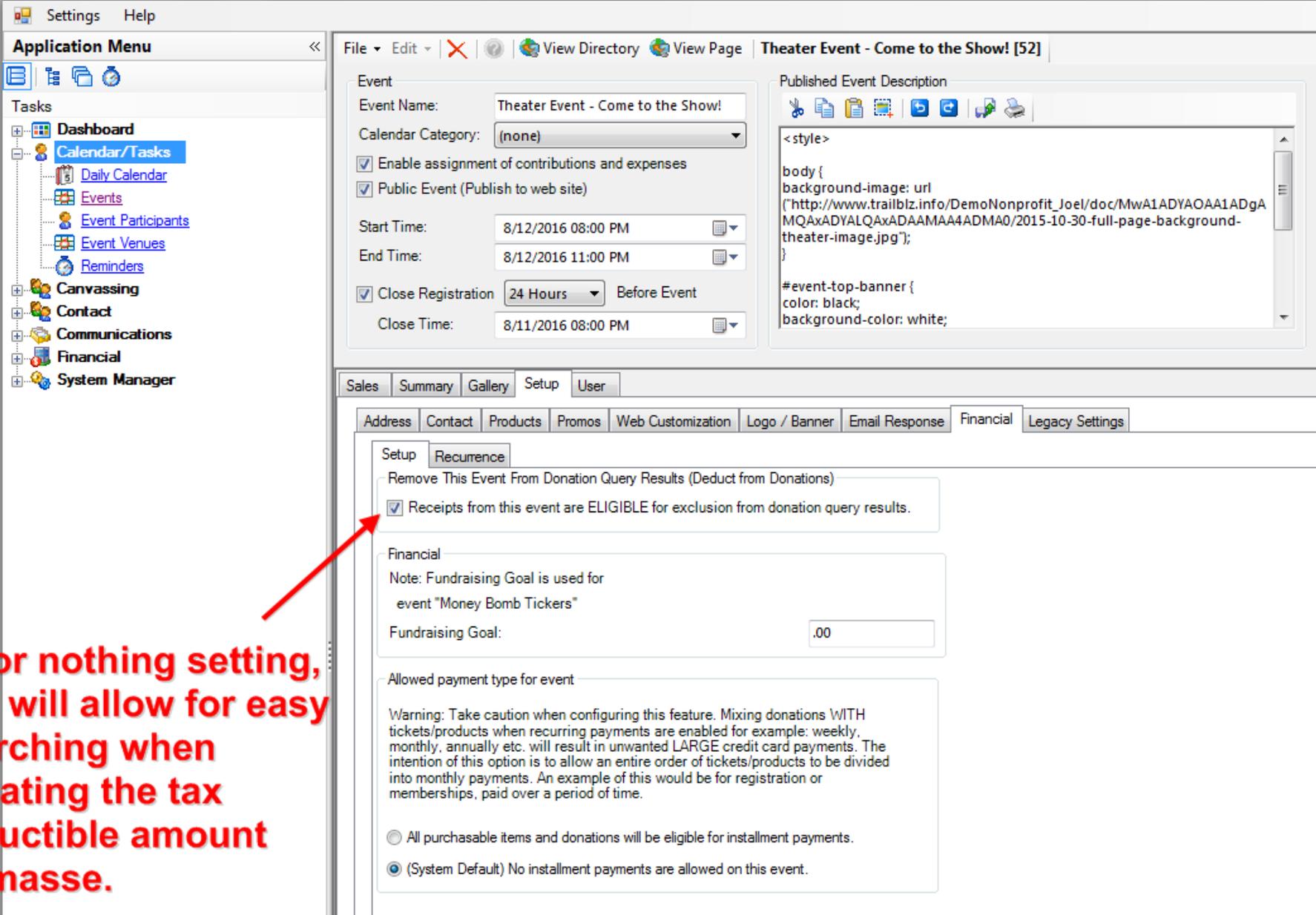
When you're finished with this task you can mass update either your list of [individuals with an attribute](#), or all members of a [household with an attribute](#) AND/OR you can [mass apply a log note](#) showing that the list of contacts received the letter.

### **#3 – How to Mass Update the Tax Deductible Amount for a List of Donations En Masse**

This section talks about how to **mass update** a list of contributions with either a tax deductible **amount** or **percentage**. This can be very useful if you for instance host an event where there are only ticket and product sales that don't qualify as a tax deductible donation, you can quickly set the amount to zero for all of those transactions for your year-end receipts.

 **Tip:** When [creating the event](#) turn on a setting that will make the event *eligible for exclusion from regular contribution queries* by checking the box under **Setup > Financial > Setup** (shown below for an example theater event).

# How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only



The screenshot displays the TrailBlazer software interface. On the left is an 'Application Menu' with categories like 'Tasks', 'Canvassing', 'Contact', 'Communications', 'Financial', and 'System Manager'. The main area shows the 'Event' settings for 'Theater Event - Come to the Show!'. The 'Event' section includes fields for Event Name, Calendar Category, Start Time (8/12/2016 08:00 PM), End Time (8/12/2016 11:00 PM), and Close Time (8/11/2016 08:00 PM). There are also checkboxes for 'Enable assignment of contributions and expenses' and 'Public Event (Publish to web site)'. The 'Published Event Description' section shows a code editor with CSS for a background image and a top banner. Below this are tabs for 'Sales', 'Summary', 'Gallery', 'Setup', and 'User'. The 'Setup' tab is active, showing a 'Recurrence' sub-tab with a checkbox 'Receipts from this event are ELIGIBLE for exclusion from donation query results.' which is checked. A red arrow points to this checkbox. Below this is a 'Financial' section with a 'Fundraising Goal' field set to '.00'. At the bottom, there is a warning about mixing donations with tickets/products and radio buttons for 'Allowed payment type for event', with the 'System Default' option selected.

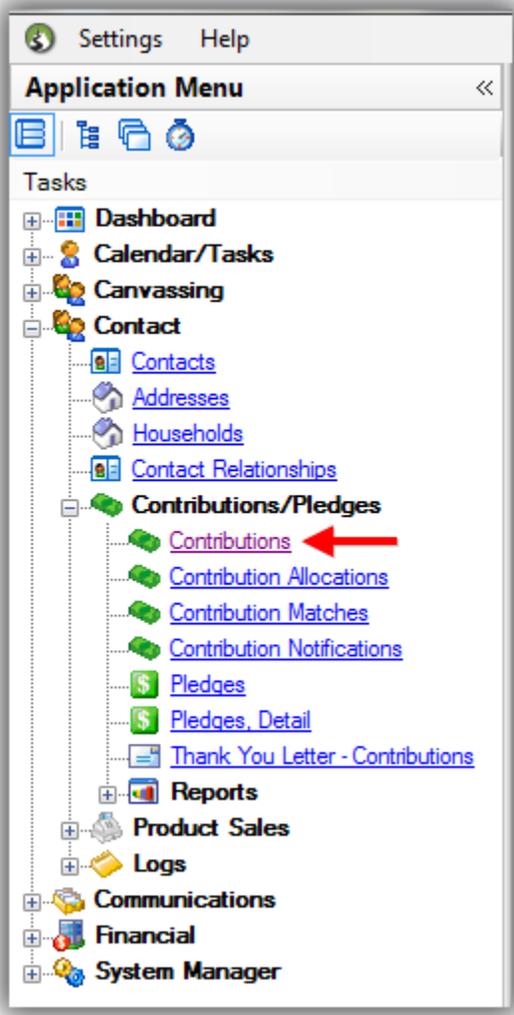
**All or nothing setting, this will allow for easy searching when updating the tax deductible amount en masse.**

## How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only

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Navigate to the **Contributions** list.

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# How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only

Run your search query for the list of donation records you need to update. *In this example I searched by the drop down-option 'Include ONLY those records from events where the event is marked: Eligible for Exl...Query Results' which produced 298 records.*

**Build and run your search query for the list of donations that you want to mass update the tax-deductible amount/percentage for.**

**For my example I selected this option to query by because I knew that all transactions from events with this setting qualify for a 'non' tax-deductible amount.**

**Results.**

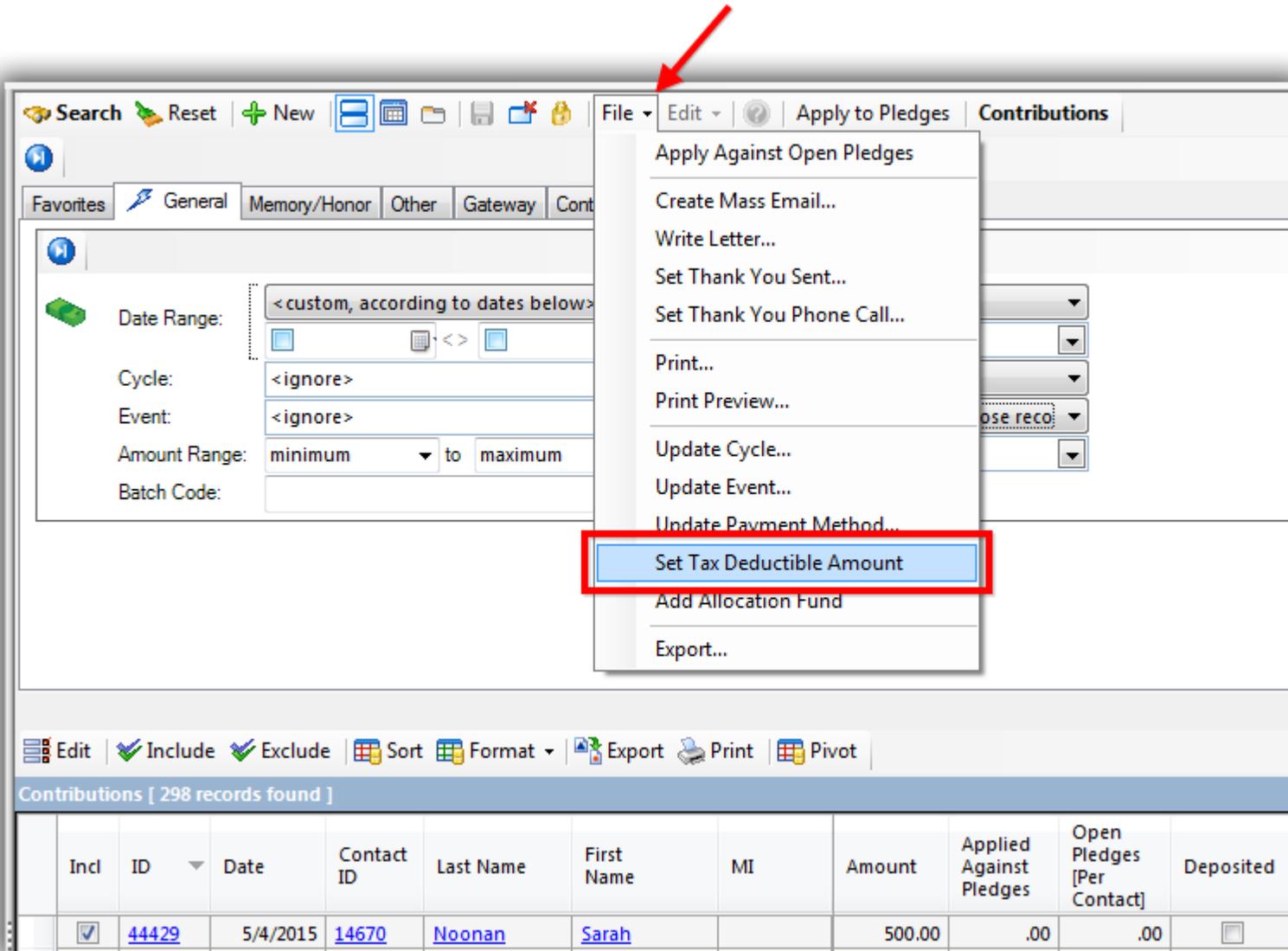
Incl	ID	Date	Contact ID	Last Name	First Name	MI	Amount	Applied Against Pledges	Open Pledges (Per Contact)	Deposited	Thank You Letter Sent	Thank You Call Done	Check #	Street	Street2	City	State
<input checked="" type="checkbox"/>	44429	5/4/2015	14670	Noonan	Sarah		500.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1234	620 Mendelssohn Ave		Minneapolis	MN
<input checked="" type="checkbox"/>	44428	5/4/2015	14547	Tracy	Kevin		145.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		7190 Chase Ct S		Littleton	CO
<input checked="" type="checkbox"/>	44427	5/4/2015	8742	Warzecha	Julie	Ann	220.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A	31928 Fifth Lake Rd		Avon	MN
<input checked="" type="checkbox"/>	44426	5/4/2015	148	Anderson	Fred	George	240.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A	4406 Colorado Ave N		Crystal	CT
<input checked="" type="checkbox"/>	44425	5/4/2015	11268	Smith	John	R	330.00	.00	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A	14300 Princeton Ave S		Savage	MN

Click **File > Set Tax Deductible Amount.**

## How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only

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## How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only



The screenshot shows the TrailBlazer software interface. The 'File' menu is open, and the 'Set Tax Deductible Amount' option is highlighted with a red box. A red arrow points to the 'File' menu. The interface includes a search bar, a toolbar with options like 'Reset', 'New', and 'Apply to Pledges', and a main area with various filters and a data table.

**File** ▾ Edit ▾ ? Apply to Pledges Contributions

- Apply Against Open Pledges
- Create Mass Email...
- Write Letter...
- Set Thank You Sent...
- Set Thank You Phone Call...
- Print...
- Print Preview...
- Update Cycle...
- Update Event...
- Update Payment Method...
- Set Tax Deductible Amount**
- Add Allocation Fund
- Export...

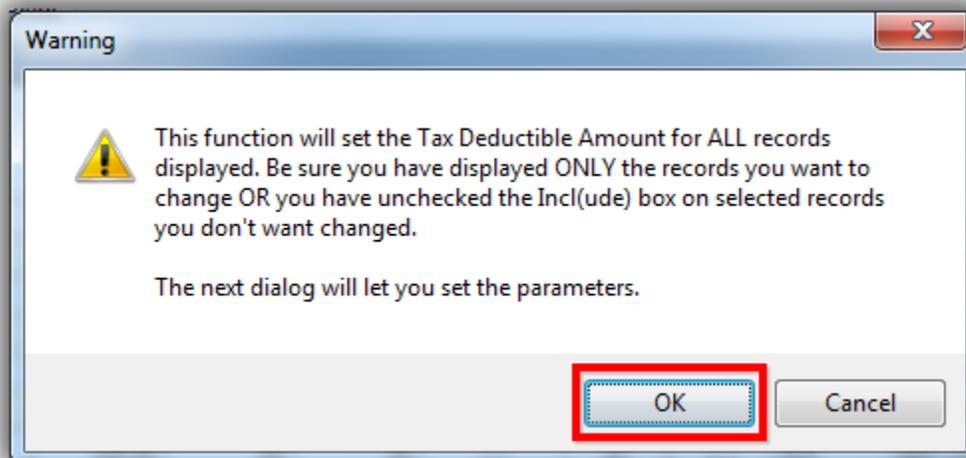
Contributions [ 298 records found ]

Incl	ID	Date	Contact ID	Last Name	First Name	MI	Amount	Applied Against Pledges	Open Pledges [Per Contact]	Deposited
<input checked="" type="checkbox"/>	<a href="#">44429</a>	5/4/2015	<a href="#">14670</a>	<a href="#">Noonan</a>	<a href="#">Sarah</a>		500.00	.00	.00	<input type="checkbox"/>

## How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only

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Read through the pop-up message, and then click **[OK]** to proceed.

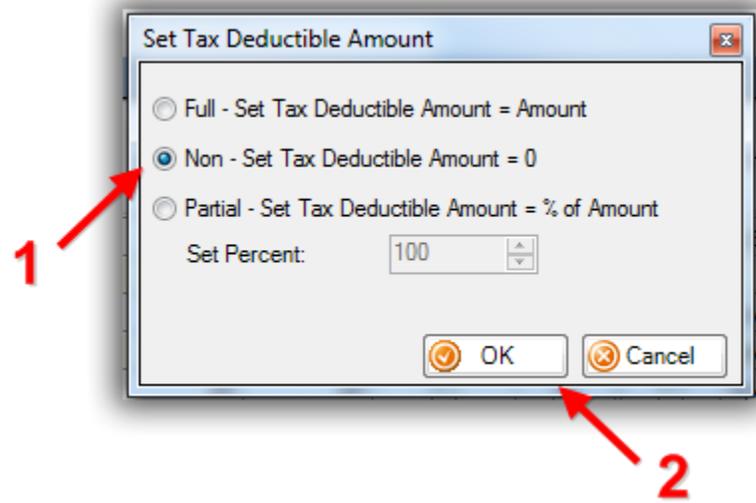


Currently these are the options you have:

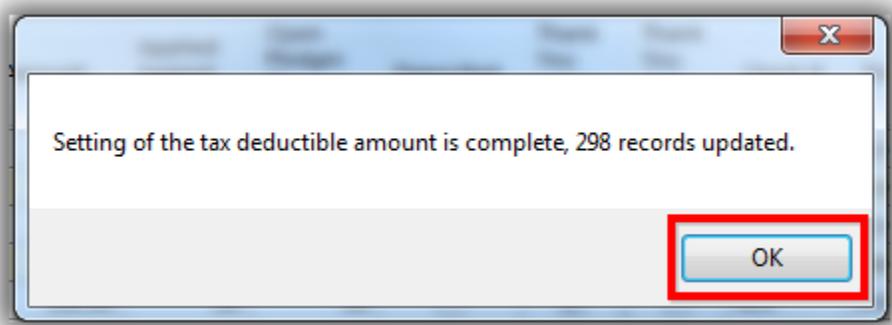
- Full – Set Tax Deductible Amount = Amount
- Non – Set Tax Deductible Amount = 0
- Partial – Set Tax Deductible Amount = % of Amount

Select your options for setting the tax deductible amount, and click **[OK]**. *In my example I selected to set the amount to zero.*

## How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only



You'll get a load animation and then a pop-up with the results once it's complete. Click **[OK]** to finish.



## How to Create a Year End Tax Letter Addressed to Each Individual Or the Entire Household using Merge Fields – Nonprofit Only

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The **related resources** below link to a variety of similar articles and videos. You can always reach out to our live tech support if you have questions going through these steps (8-5 CT | **1-866-909-8700**).



Trail Blazer™

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

## Related Resources

**Article:** [\(Mail-Merge\) – How to Write a Letter, and Save it as a Template](#)

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

**Article:** [Inserting Contribution Transactions In Donor Merge Letter](#)

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

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

**Article:** [Save and Load a Search Query as a Favorite](#)

**Article:** [How to Mass Update a List of Contacts with an Attribute Item](#)

**Article:** [Adding Lot Notes, Mass Log Notes & Reminders](#)

**Article:** [Creating an Attribute Folder and Attribute Items](#)

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

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

**Video:** [Getting Started 102 – Beginning Queries](#)

## Trail Blazer Live Support

📞 **Phone:** 1-866-909-8700

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