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Overview

This article will show you how to create a **custom thank-you auto-responder email** for your online donation form. It then shows how to **activate the email** within the Website Configuration are of the application. This process can be repeated for the other <u>iFrame forms</u> and <u>custom forms</u> that you build with **Trail Blazer**.

Tip: If you prefer video tutorials <u>this link</u> on our **YouTube Channel** provides a concise walkthrough on this task.



<u>Steps</u>

Navigate to the Templates List under the Application Menu. Requires appropriate security clearance.



Click the [+ New] button on the search tool strip.



Search Reset Image: Search Image: Search							
	Template		Date	Created			Lice
Incl	ID	Name	Created	By ID	Created By	Subject	Count
	<u>196</u>	Joel's Default Starter Template - From T	5/4/2016	12796	Kristenson, Joel		0
	<u>195</u>	2016-04-28-advocacy-email-example-fro	4/28/2016	12796	Kristenson, Joel	THIS IS A DRAFT	0
	<u>194</u>	Individual Donation Thank-You throug	4/27/2016	12796	Kristenson, Joel	Thank you for your donation!	0
	<u>193</u>	2016-04-18-abpp-link-to-pdf-clean-out	4/18/2016	12796	Kristenson, Joel	THIS IS A DRAFT	0
	<u>192</u>	test	4/12/2016	12796	Kristenson, Joel		0
	<u>190</u>	2016-04-01-abpp-example-pdf-newslet	4/1/2016	12796	Kristenson, Joel	THIS IS DRAFT	0
	<u>189</u>	2016-04-01-mofas-nice-donate-button	4/1/2016	12796	Kristenson, Joel	THIS IS A DRAFT	0



Give the template a name, and then click [Create]. In my example I called my "Auto-Responder – Donation Thank-You".



1. Create a name for your auto-responder email.





You have a couple of choices at this point you can either <u>create your own template</u> from scratch or choose from one of the **Standard Trail Blazer** templates. In this example I opted for the 2nd option, to use one of the <u>pre-built templates</u> as a starting point, which already has the main **merge fields** needed for a donation thank-you email.

Click the File drop-down in the upper-left, and select Insert Trail Blazer standard template...



File - Edit - 🗙 🚳 Saved Copies Auto-Responder - Donation Thank-You
Insert Trail Blazer standard template
Save
Save a copy as another template
Make this template your signature
Image: Source Ima
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Styles - Normal - Font - Size - A- A-
0

Select the template for online donations called "t_Online_Donation_TY_Auto-Responder_with_Supported_Merge_Fields", and then click [Open]. KNOWLEDGE BASE www.trailblz.com/kb 7





Insert Template		- • ×
Name: t_Online_Donation_TY_Auto-Responder_with_Supported_Merge 👻		
Template Name	Subject	Created
kit_Advanced_600_2_Column_Newsletter		2015/10/21
t_Advanced_640_Call_to_Action_Mobile_Friendly		2016/03/04
t_Basic 600		2014/10/21
at_Basic_2_Column_Mobile_Responsive		2016/02/24
t_Basic_600_Newsletter		2015/10/12
t_Basic_600_SingleColumn_BulletPointSections_BlueBackground		2015/12/18
t_Donation_TY_Mass_E-Mail_Campaign_or_Indv_E-Mail_with_Supported_Merge_Fields	Thank you for you donation!	2016/03/09
t_Membership_Auto_Responder_Receipt_with_Merge_Fields	Thank You! Membership Details & Benefits Enclosed	2016/03/09
at_Online_Donation_TY_Auto-Responder_with_Supported_Merge_Fields	Thank you for your donation!	2016/03/09
函t_SidebarLeft 600		2014/12/30
		2014/10/21
1. Select this template. This stan has merge fields supported by T	dard template already rail Blazer for your	
online donation form including	the contribution date,	
and amount.		



Click **[OK]** when prompted about overwriting your current template. (If you're starting from scratch as I was you don't need to worry about this warning, if you have unfinished work click [Cancel]).

This is what the standard auto-responder email template should look like when it's first inserted:



Strail Blazer How to Create a Custom Thank-You Auto-Responder Email with Merge Fields For your Online Donation Form





You can now finish the email by completing these steps:

- <u>Swap out images</u> with your logo, header, footer, signature, and social media icons
- Swap out the **default text**, font styles, etc. to include your own message
- Replace any hyperlinks to things like your website, social media pages, etc.

Below is the **list of merge fields** that are currently supported in the thank-you auto-responder, as well as a list of those that are not supported (*as of the time this article was written*).

These merge fields work:

«FirstName»
«ContributionAmount»
«MMMM dd, yyyy»
«LastName»
«LastName»
«Nick Name or FirstName»
«AddressID»
«AddressID»
«Street2»
«Street2»
«City»
«State»
«ZipCode»
«Employer»
«Occupation»
«EmailAddress»



«MM/dd/yyyy»
«MMMM dd, yyyy»
«yyMMdd»
«MM/dd/yyyy hh:mm:ss»
«MM-dd-yy»
«unsubscribe»
«UserDate1»
«UserDate1»
«UserDate2»
«UserDate3»
«ContributionTotalYTD»
«ContributionTotalDateRange»
«MonContributionsDateRange»
«ContributionCount»

These ones don't:

DateCreated EmailCampaignId ContributionId ContributionDate



EventId
EventName
Title
Suffix
NickName
Household Salutation
Household Envelope
Street3
StreetCityStateZipBlock
AltEmailAddress
Phone_Alt
Phone_Cell
Phone_Home
Phone_Fax
Phone_Bus
Phone_BusFax
ContributionLastDate
ContributionLastAmount
User001
User002
User003
User004
User005
User006
User007
User008



User009 User010 User011 User012 BirthDate MembershipDuration MembershipType MembershipStartDate OrganizationName

OrderReceipt

Once you are finished with your template click [Save and Close].



Structure Control For Your Online Donation Form For your Online Donation Form

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emplate: Auto-Responder - Donation Thank-You - For KB on Creating an Auto-Responder with *All* Available Merge Fields with Lists for those 1
ubject: Thank you for your donation!
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Insert merge field 🔹 📝 Filter Content
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B I U S ×₂ ײ Ix]
Styles Normal Font Size Ka
Your Oranization Name Goes Here is a 501 (c)(3) per the IRS tax code. Our EIN is (<i>replace this</i> with your EIN) 48-2188422. Please retain this email as your receipt. Thank you, Joel Kristenson Professional Dishwasher <u>jkristenson@trailblz.com</u> <u>www.trailblz.com.com</u> <u>[b] [] [] [] [] [] [] [] [] [] [] [] [] []</u>
body table tbody tr td p
Normal Text Version
Save Save and Close Ocancel



Now that your template is ready to go you'll need to set it as your auto-responder and refresh your website settings.

Navigate to **Website Configuration** > **Donations** > **Email Response**, **select your template** from the drop-down, click **[Save]**, and then click the **blue** link in the upper-right to refresh your settings. *The image below details these* **4** *steps*.



Strail Blazer How to Create a Custom Thank-You Auto-Responder Email with Merge Fields For your Online Donation Form

Trail Blazer Version 6.2.6011.27189 Demo	Nonprofit Joel - [Up	date Website Configuration]				
🔇 Settings Help				_ 8 ×		
Application Menu «	File - Edit - 🔞	🌮 Iframe Wizard				
BIRGØ	Site Title:	Demo Nonprofit - Joel	Refresh web pages			
Tasks	Meta Description:		Click here to refresh your web pages using			
	Meta Keyworde:		updated specifications.			
ia	Thoma Nama:	default				
	Theme Name.		•			
	Flat Shipping Fee:	.00				
Communications	Enable double O	pt-In for all forms				
Financial						
	Site Settings Caler	ndar Events Donations Signup Email Signup Sho	t Signup Without Attributes Signup Attributes Signup Post			
System Gallery	Page Setup Dona	ation Amounts Recurring Frequency Related Lists	Email Response Live Preview (Donations.aspx?ver=2)			
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Customize Labels	(Template Preview	/) Emailed, Thank you Letter 📃 📐				
Website Configuration	- 1					
		2.6.1				
	2. Select the new template you created					
	to use as your auto-responder for online					
	donations.					
	VOLID					
	YUUK					
		«MMMM dd, yyyy»				
		Dear «FirstName» «LastName»,				
		Thank you so much for your generous don can fulfill our msision.	nation of «ContributionAmount». With your help we			



You'll receive a popup notification. Click **[OK]** to proceed with the refresh of your web settings.



You'll receive another popup message once this is finished. Click **[OK]** again to close the message.





It's wise to now **test** out your email to make sure everything is how you want it to be i.e. the merge fields work, there aren't typos, the images/links work, etc.

You can navigate to your **Trail Blazer** donation form where it's implanted as an <u>iFrame</u> on your website, or to the location where it's hosted on our domain (<u>www.trailblz.info/YourDatabaseNameGoesHere/donations.aspx</u>). *In my example it was hosted @* <u>https://www.trailblz.info/demononprofit_joel/donations.aspx</u> as shown in the images below for my test contribution.

Img 1 of 2 – Fill Out the Test Donation – Top Half of Form



Top half of example donation for testing the auto-responder email.

Share: Share: Share) 🛈 🛈 🖍 http 87	os://www. trailblz.info /demononprofit_joel/donations	Q. Search ☆ 自 ♥ ♣ ★ √ ♀ ♥ ▼	=			
Iling Information * First Name Joel Midde \$10 - Supporter Midde \$50 - Associate * Last Name \$500 - Patron * Address 9110 Golden Valey Rd. Apt. 10 \$750 - Bronze * Address 9110 Golden Valey Rd. Apt. 10 \$1000 - Silver * City Golden Valey * State Minnesota * Testing for the KB on what auto-responder merge fields work for online donations. \$1000 - Time Donation State work for online donations. \$sngle One Time Donation	Trail Blaze	r Share: 💽 🕻	n 🗈 🖶 Gel (0				
Illing Information * First Name Middle Middle * Last Name Nickname * Last Name Nickname * Address 9110 Golden Valley Rd. Apt. 10 * City Golden Valley * State Minnesota * Zip Code 55427 * Phone * Email jkristenson@tralible.com Image Y Yes, I want to receive future emal updates. Show my donation on the webste ticker. Comment Testing for the KB on what auto-responder merge fields work for online donations. Single One Time Donation Single One Time Donation							
 * First Name Joel Middle * Last Name Kristenson Nickname * Address 9110 Golden Valey Rd. Apt. 10 \$100 - Silver \$200 - Friend \$500 - Patron \$500 - Silver \$1000 - Silver \$2000 - Gold \$2000 - Gold \$2000 - Gold \$2000 - Gold \$2000 - Silver \$2000 - Gold \$2000 - Platinum \$2000 - Silver \$2000 - Platinum \$2000 - Silver \$2000 - Silver \$2000 - Silver \$2000 - Gold \$2000 - Platinum \$2000 - Platinum \$2000 - Silver \$2000 - Platinum \$2000 - Platinum \$2000 - Platinum \$2000 - Silver \$2000 - MEGA Sponsor \$212016.00 Make my donation Single One Time Donation Select a Restricted Allocation Fund Below 	lling Informa	ation	Donation Amount				
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 * Last Name Kristenson Nickname * Address 9110 Golden Valley Rd. Apt. 10 \$ \$ 500 - Patron \$ \$ 750 - Bronze \$ \$ \$ 1000 - Silver \$ \$ 2000 - Gold \$ \$ 2000 - Gold \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	Middle		\$50 - Associate				
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 * Address 9110 Golden Valley Rd. Apt. 10 * City Golden Valley * State Minnesota * Zip Code 55427 * Phone * Emai jkristenson@trailblz.com I Yes, I want to receive future email updates. I Show my donation on the website ticker. Comment Testing for the KB on what auto-responder merge fields work for online donations. I Single One Time Donation Select a Restricted Allocation Fund Below 	Nickname		\$500 - Patron				
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 * City Golden Valley * State Minnesota * Zip Code 55427 * Phone 55427 * Phone 1 * Email jkristenson@trailblz.com ✓ Yes, I want to receive future email updates. ✓ Show my donation on the website ticker. Comment Testing for the KB on what auto-responder merge fields work for online donations. ✓ Select a Restricted Allocation Fund Below 		Apt. 10	\$1000 - Silver				
 * State Minnesota * Zip Code 55427 * Phone * Email jkristenson@trailblz.com I jkristenson@trailblz.com I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email updates. I yes, I want to receive future email up	* City	* City Golden Valley S2000 - Gold					
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 * Phone * Email jkristenson@trailblz.com ✓ Yes, I want to receive future email updates. ✓ Show my donation on the website ticker. Comment Testing for the KB on what auto-responder merge fields work for online donations. ✓ Show my donation on the website ticker. Comment Testing for the KB on what auto-responder merge fields work for online donations. ✓ Show my donation on the website ticker. ✓ Show my donation. ✓ State a Restricted Allocation Fund Below 	* Zip Code	55427 \$10000 - Sponsor					
 * Email jkristenson@trailblz.com ✓ Yes, I want to receive future email updates. ✓ Show my donation on the website ticker. Comment Testing for the KB on what auto-responder merge fields work for online donations. ✓ Single One Time Donation ✓ Select a Restricted Allocation Fund Below 	* Phone	Phone \$25000 - MEGA Sponsor					
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Comment Testing for the KB on what auto-responder merge fields work for online donations.		Yes, I want to receive future email updates.Show my donation on the website ticker.	Make my denation				
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			Select a Restricted Allocation Fund Below				
450.00 2016 Disaster Relief Fund	olunteer		450.00 2016 Disaster Relief Fund				
		etter	0.00 2010 General Fund				



Img 2 of 2 – Fill Out the Test Donation – Bottom Half of Form



Bottom half of test donation for testing auto-responder emails.

🗲 🛈 🗊 🚱 https://www.trailblz.info/demononprofit_joel/donations 🛛 🤁	Q Search ☆ 自 ♥ ♣ ☆ ◇ ♥ - 目				
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	300.00				
Colort Bidente Compart	\$1016.00 of \$6212016.00 allocated.				
Select Rider to Support					
✓ Chad	Make my donation in Honor or Memory of				
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Joel	Name Here Prince				
C Kevin					
Mark	Employment Information				
Pat					
Sue Required by Federal and State Election Laws					
Tom	Trail Blazer Campaign Services				
	* Occupation Professional Dishwasher				
Please select your email preferences					
Annual newsletter	Payment				
Critical updates only regarding major news	Carth Card				
Monthly newsletter					
Please never contact me by email					
☑ Quote of the day notifications					
	Note: Address above must match Credit Card.				
	* First Name Joel				
	* Last Name Kristenson				
	ACLV - VI				
	* Card 1234567891				
	* Expiration on a court of CVV				
	201/ ▼ 201/ ▼ 123				

Once you're finished entering the form information click [Donate Now] to process the



Once you process your donation you'll receive the thank-you auto-responder email. *My example is shown below in 3 images with the working merge fields as well as those that don't work.*

Img 1 of 3 – Top Half of My Example Auto-Responder



Top half of my example auto-responder email with merge fields.

🖂 🚽 📁 🌢 🗢 -	Thank you for your de	onation! - Message (HTML)	
File Message			۵ 😮 .
Reply Reply For All Delete Reply Reply For All	Archive Archive Archive Archive Archive To Manager Tram E-mail Quick Steps	A with a set of the set of	ad a hind Find Translate Select Zoom 5 Editing Zoom
From: Demo Nonprofit Joel <jkris To: Joel Kristenson Cc: Subject: Thank you for your dona</jkris 	stenson@trailblz.com>		Sent: Wed 6/22/2016 4:21 PM
	VO	lir	
	LOGO	HERE	≡
June 2 Dear	22, 2016 Joel Kristenson,		
Thank fulfill	k you so much for your generous dona l our msision.	tion of \$25,000.00. With your help we ca	n
Thes Joel \$25,0 June Krist	<u>e merge fields work:</u> 100.00 22, 2016 tenson		
Joel 8525 9110 Apt 1	Golden Valley Rd 10 14 - Valley		
Gold MN 55427 Trail Profe	en vaney 7 Blazer essional Dishwasher		
jkriste 06/22	<u>enson@trailblz.com</u> 2/2016		



Img 2 of 3 – Top Half of My Example Auto-Responder



Middle section of my auto-responder email with merge fields.

🖂 🚽 🧉 🍐 🔶 -	Thank you	for your donation! - Message (HTM	AL)	
File Message				۵ 🕜
lgnore X A A A A A A A A A A A A A A A A A A	Forward 🖏 More 🔹 Har E-	nger v Move nail v Kules v Move Actions	e Assign Yeolicy Yeolicy Yeolicy	A Find → Related → ate Select → Zoom
Delete	Respond Quick	iteps 🕞 Move	Tags 🖓	Editing Zoom
From: Demo Nonprofit Joel <j To: Joel Kristenson Cc: Subject: Thank you for your do</j 	kristenson@trailblz.com>			Sent: Wed 6/22/2016 4:21 PM
				87
06/ 06- <u>un</u>	22/2016 12:00:00 22-16 <u>subscribe</u>			
Th Da En	<u>ese ones don't:</u> teCreated nailCampaignId			
Co Co Ev Tit	ntributionId ntributionDate entId entName le			
Su: Nit Ho Ho Str	ffix :kName usehold Salutation usehold Envelope eet3			
Str Alt Ph	eetCityStateZipBlock EmailAddress one_Alt			=
Ph Ph Ph Ph Ph	one_Cell one_Home one_Fax one_Bus			
Ph Co Co	one_BusFax ntributionLastDate ntributionLastAmount			
Us Us Us	er001 er002 er003 er004			
Us Us Us Us	er004 er005 er006 er007			
Us	er008			



Img 3 of 3 – Top Half of My Example Auto-Responder



Bottom half of my auto-responder email with merge fields.

⊠ 🛃 🕫 ଓ 🍲 🗢 두	Thank you for your o	donation! - Message (HTML)		
File Message				۵ ()
Ganore X Solunk → Delete Reply Reply Forward All Delete Respon	Meeting Archive To Manager To Manager Team E-mail Quick Steps	▼ Move Move ✓ Move Actions	ign Tags Mark Unread Categorize * Transla	H Find Related → te Select → Editing Zoom
From: Demo Nonprofit Joel <jkristens< th=""><th>on@trailblz.com></th><td></td><td>S</td><td>ent: Wed 6/22/2016 4:21 PM</td></jkristens<>	on@trailblz.com>		S	ent: Wed 6/22/2016 4:21 PM
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Your Ora (replace) Please ret Thank yo Joel Kris Professio jkristense Www.tra	nization Name Goes Here is a 50 this with your EIN) 48-2188422. ain this email as your receipt. u, tenson nal Dishwasher <u>m@trailblz.com</u> <u>iblz.com.com</u>	1 (c)(3) per the IRS tax cod	le. Our EIN is	



If you are satisfied with the results you are finished, otherwise you can return to the template to make your changes. *If you need to make changes you'll need to refresh your website configuration settings after those changes are made.

The related resources below link to a variety of articles and videos related to this topic.



Trail Blazer

YouTube Channel

- Knowledge Base Articles

- 3rd Party Resources



Related Resources

Article: How to Configure Recurring Donation Options for your Trail Blazer Donation Form (must be using either Vanco Services or Authorize.Net as your Merchant Gateway Article: How to Put your Trail Blazer Donation Form on your Facebook Page Article: Linking your Website to your Database with Configurable iFrame Forms Article: Build Your Own Custom Signup Form (Get) Article: How to Create Custom Email Responders for Specific Events – New 2016 Feature Upgrade Article: How to Access and Use the Standard Trail Blazer Templates as a Starting Point for Template Creation and Mass E-Mail Campaigns Article: Configuring your From and Reply Email Address Settings Article: Sample Get JavaScript Form to Get you Started - Trail Blazer API Video: Iframes Video: Donation Auto Responders with Merge Fields Video: Eblasts Configure email settings before mass emailing Video: Thank you's using mass email



Trail Blazer Live Support

- **C** Phone: 1-866-909-8700
- Email: support@trailblz.com
- Facebook: https://www.facebook.com/pages/Trail-Blazer-Software/64872951180
- Twitter: <u>https://twitter.com/trailblazersoft</u>

* 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. 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 <u>GoToMeeting</u> session where we host our live interactive trainings.

* This service *is* included in your contract.