Write Thank You Letters (Receipts) to Donors and Flag them as Thanked

Author: Kristenson, Joel
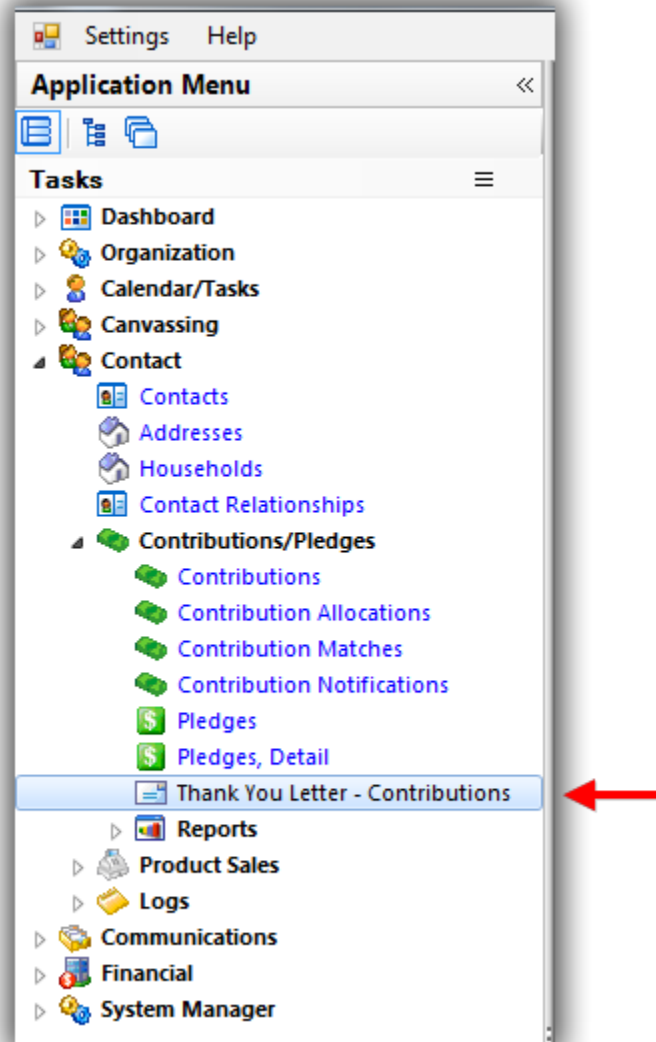
Last Updated: 2017-07-31

Overview

This article walks through the steps to **thank donors** for their donations, and **"flag"** them as thanked afterwards.

💡 **Tip:** Prefer video? Click here to watch a short video on how to accomplish this task.

Steps

Navigate to the **Thank You Letter – Contributions** list.

Settings   Help

Application Menu   «

Tasks   ≡

- ▷ ⊞ **Dashboard**
- ▷ 🔍 **Organization**
- ▷ 👤 **Calendar/Tasks**
- ▷ 🔍 **Canvassing**
- ▲ 🔍 **Contact**
  - 📇 Contacts
  - 🔍 Addresses
  - 🔍 Households
  - 📇 Contact Relationships
  - ▲ 💵 **Contributions/Pledges**
    - 💵 Contributions
    - 💵 Contribution Allocations
    - 💵 Contribution Matches
    - 💵 Contribution Notifications
    - 💲 Pledges
    - 💲 Pledges, Detail
    - 📄 Thank You Letter - Contributions   ←
    - ▷ 📊 Reports
  - ▷ 🖨 **Product Sales**
  - ▷ 📁 **Logs**
- ▷ 🔍 **Communications**
- ▷ 🖥 **Financial**
- ▷ 🔍 **System Manager**

This list will automatically populate with all donations that **haven't** been marked as **thanked**. You can filter the list further with a search query by criteria such as **amount**, **date**, **event**, etc. *In this example I had 9 records.*

The Thank You Letter List will populate all donations that haven't been marked as thanked.

	ID	Date	Last Name	First Name	Amount	Applied Against Pledges	Open Pledges [Per Contact]	Deposited	Thank You Letter Sent	Thank You Date	Thank You Call Done	Check #	Street	Street 2	City	State	Zip Code	Deposit Date	Cycle ID	Cycle	Payment Method	Recurrence Type
☑	46963	6/12/2017	Jablonski	Anna	75.00	.00	.00	☑	☐		☐	0123	23565 Birch Cir		Rogers	MN	55374	7/10/2017	30	Calendar Year 2017	Check	Single
☑	46964	6/12/2017	Kristenson	Joel	125.00	.00	.00	☑	☐		☐		9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427	7/10/2017	30	Calendar Year 2017	Check	Single
☑	46965	6/12/2017	Langhoff	Renae	1,025.00	1,000.00	.00	☑	☐		☐		701 Oak Park Ln	Apt 71	Hopkins	MN	55343	7/10/2017	30	Calendar Year 2017	Check	Single
☑	46966	6/12/2017	Abrahamian	David	25.00	.00	.00	☑	☐		☐		6012 Beard Ave S		Edina	MN	55410	7/10/2017	30	Calendar Year 2017	Check	Single
☑	46972	6/16/2017	Angrist	Noam	190.72	100.00	.00	☑	☐		☐		Plot 142	Unit 4	Gaborone	GIFP		7/10/2017	30	Calendar Year 2017	Credit Card	Single
☑	46973	6/16/2017	Stewart	Samantha	46.39	.00	.00	☑	☐		☐		1855 Hennepin Ln E		Minneapolis	MN	55146	7/10/2017	30	Calendar Year 2017	Credit Card	Single
☑	46974	6/19/2017	Henry	John	10.31	.00	50.00	☑	☐		☐	echeck	8164 Metal Head Rd		Greenbay	WI	54229	7/10/2017	30	Calendar Year 2017	ACH	Single
☑	46975	6/19/2017	Kristenson	Joel	50.00	.00	.00	☑	☐		☐		9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427	7/10/2017	30	Calendar Year 2017	ACH	Single
☑	46980	7/12/2017	Clooney	George	2,061.86	.00	.00	☑	☐		☐	echeck	1417 Versailles Rd		Lexington	KY	40502	7/10/2017	30	Calendar Year 2017	ACH	Single
9					3,609.28	1,100.00	50.00	9	0		0								270			

You can check and uncheck boxes for those people you want the letter to go to.

You can **check** and **uncheck** boxes in the first column for the donations you need to issue a thank-you receipt for.

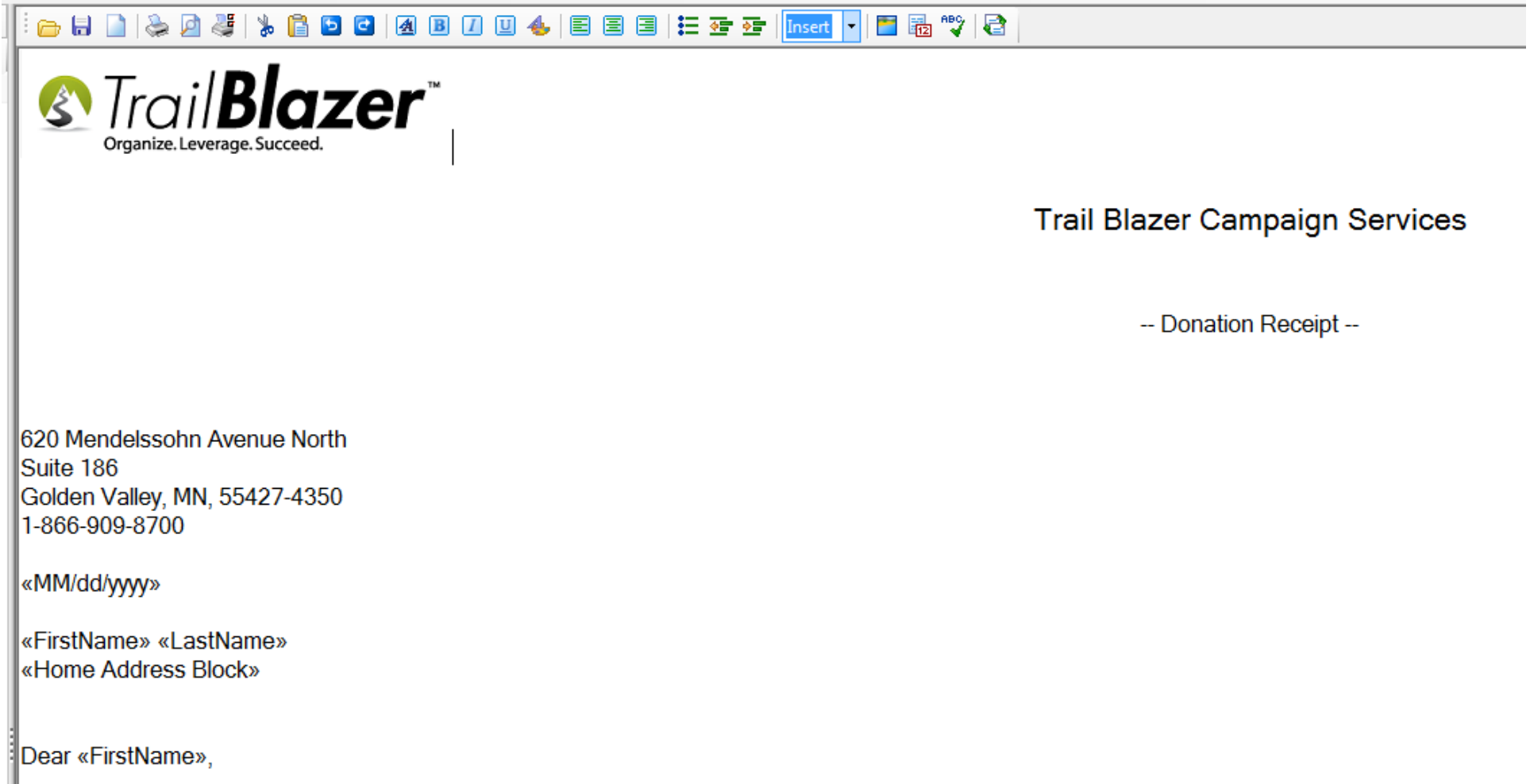Once the list you need is populated select **File** > **Write Letter**.

If you have a letter that's already saved as a template you can **insert** it by selecting **File > Insert Template**. *In this example I typed out a new letter which I'll save at the end after printing.*

Compose your letter with your text, images, signature, spacing, etc. You can select the different merge fields you need for your letter from the **Insert Merge Field…** drop-down. *Not all **merge fields** will work in the Thank You Letter list.*

Insert merge fields.

Trail Blazer Campaign Services

-- Donation Receipt --

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

«MM/dd/yyyy»

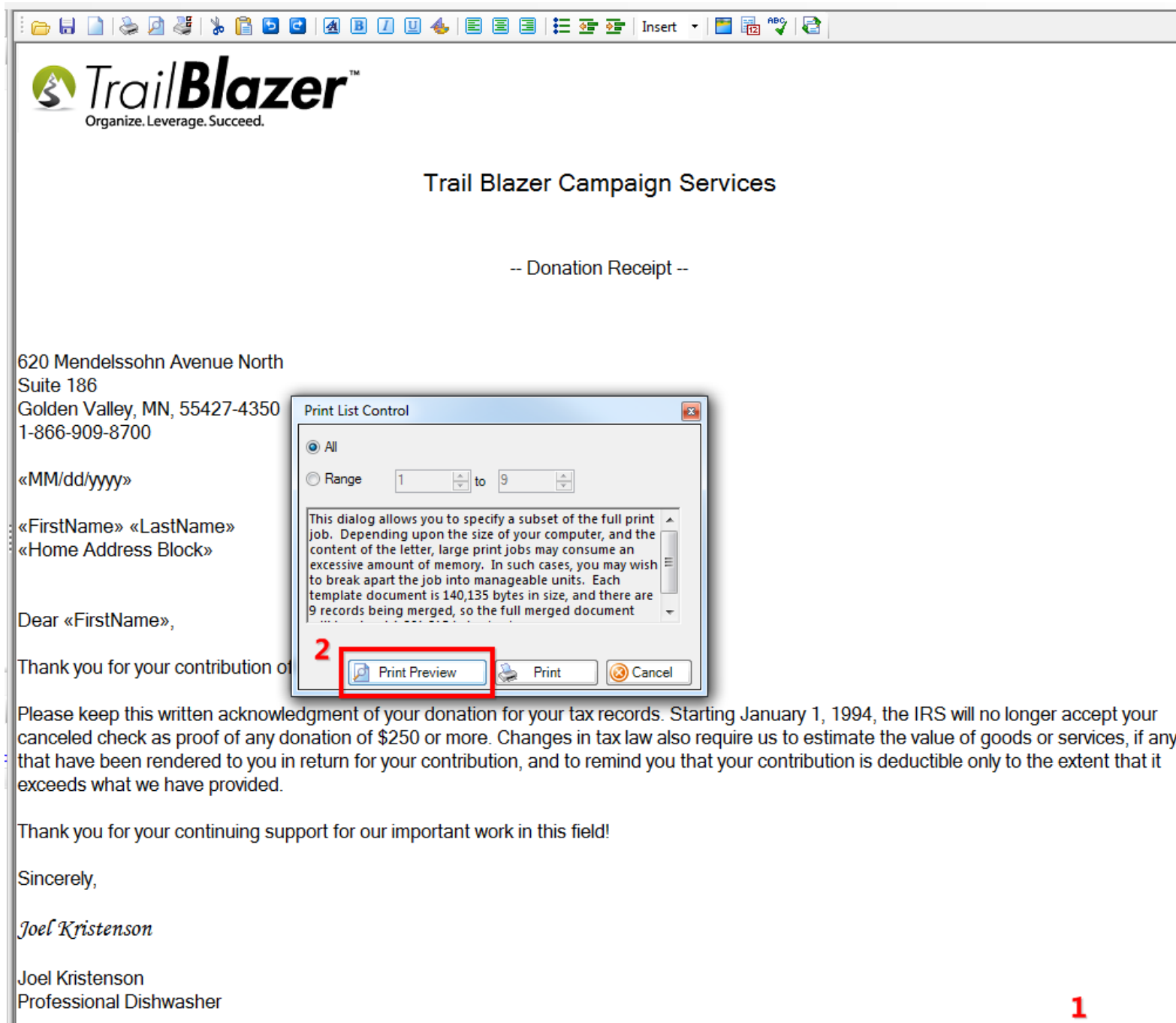«FirstName» «LastName»
«Home Address Block»

Dear «FirstName»,

There are many **merge fields** you can utilize when writing these letters – these are a few of the common ones used for this type of letter:

- «MM/dd/yyyy»
- «FirstName»
- «LastName»
- «Home Address Block»
- «Amount Contribution»
- «Contribution Date»

Run a **print preview** by clicking **[Print]** > **[Print Preview]**.

Trail Blazer Campaign Services

-- Donation Receipt --

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 o...

Print List Control

○ All

○ Range 1 to 9

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 140,135 bytes in size, and there are 9 records being merged, so the full merged document

2 [Print Preview]   [Print]   [Cancel]

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!
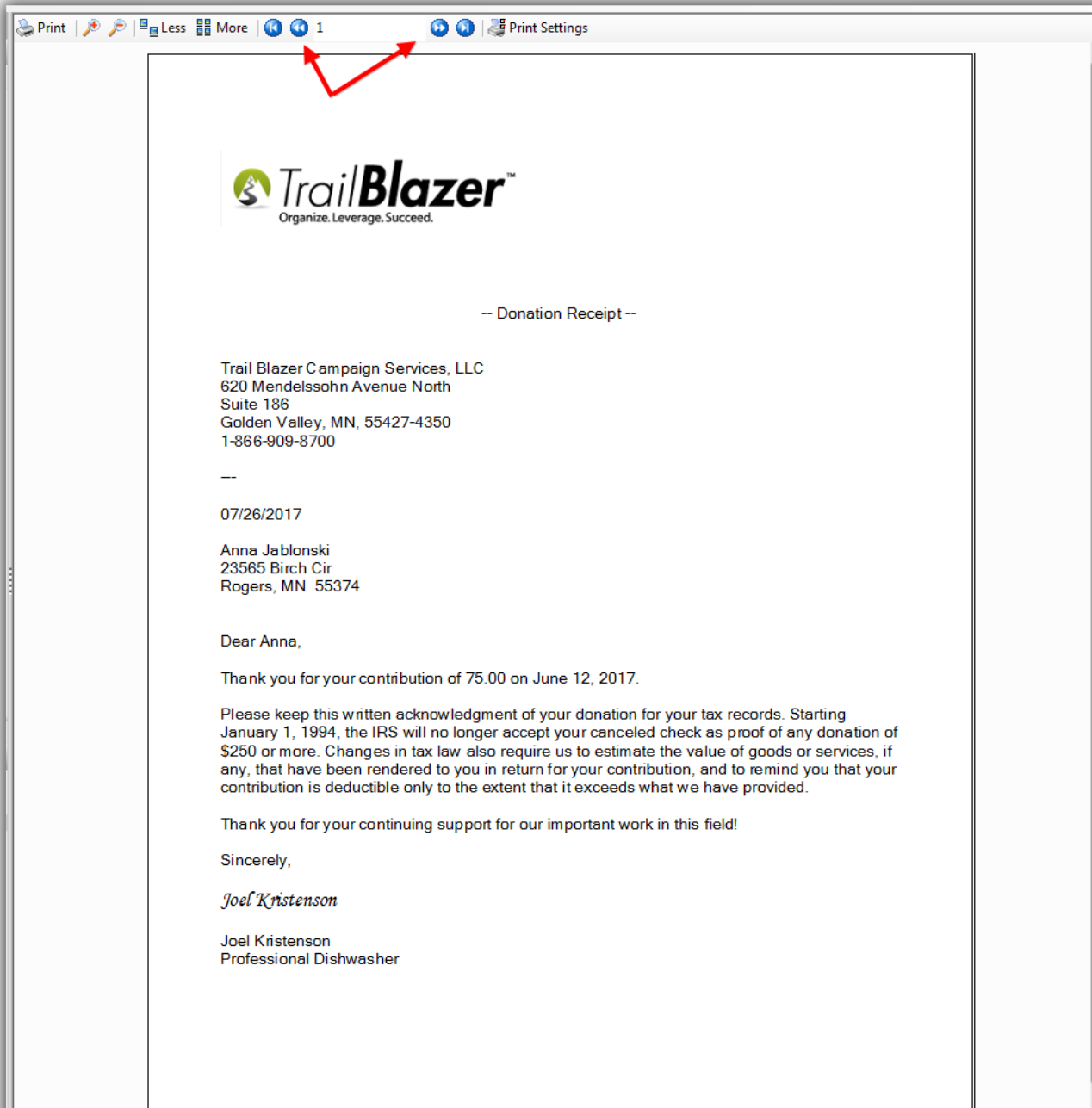
Sincerely,

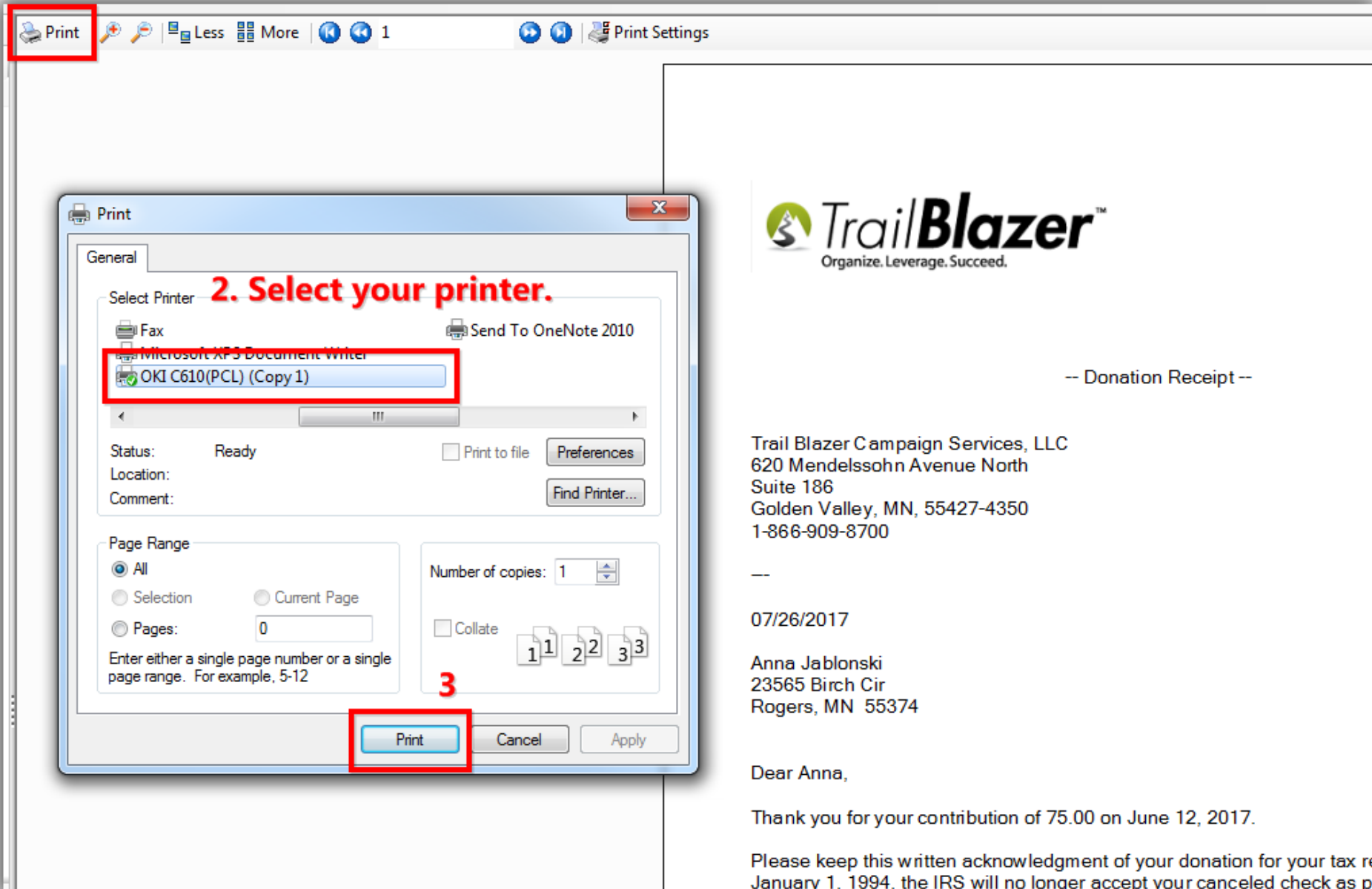*Joel Kristenson*

Joel Kristenson
Professional Dishwasher

1

Page through the letters you're printing to **verify everything is accurate**. You can adjust the **page settings** (margins, type of paper, etc.) if necessary by clicking the **[Page Settings]** button on the top tool bar.

Page through and verify your letter is ready to print for each donor.

If you need to make further changes to the letter you can click **[Cancel]** in the bottom-right. When you're ready to print click the **[Print]** button, select which printer to use, and click **[Print]** to finish. *Mail your letters – you can use* **Trail Blazer** *to print* envelopes *and* labels *as well.*

1

Print | 🔍➕ 🔍➖ | Less More | ◀ ◀ 1   ▶ ▶ | Print Settings

Print

General

2. Select your printer.

Select Printer

Fax   Send To OneNote 2010
Microsoft XPS Document Writer
OKI C610(PCL) (Copy 1)

Status: Ready   ☐ Print to file   Preferences
Location:
Comment: Find Printer...

Page Range
◉ All   Number of copies: 1 ▲▼
○ Selection   ○ Current Page
○ Pages: 0   ☐ Collate
                                      1¹ 2² 3³
Enter either a single page number or a single
page range. For example, 5-12

3

Print   Cancel   Apply

TrailBlazer™
Organize. Leverage. Succeed.

-- Donation Receipt --

Trail Blazer Campaign Services, LLC
620 Mendelssohn Avenue North
Suite 186
Golden Valley, MN, 55427-4350
1-866-909-8700

07/26/2017

Anna Jablonski
23565 Birch Cir
Rogers, MN 55374

Dear Anna,

Thank you for your contribution of 75.00 on June 12, 2017.

Please keep this written acknowledgment of your donation for your tax re
January 1, 1994, the IRS will no longer accept your canceled check as p

After printing and mailing your letters, **return back** to your list of donations in the **Thank You Letter – Contributions** list, and click **File > Set Thank You Sent…**

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Organize. Leverage. Succeed.

Write Thank You Letters (Receipts) to Donors and Flag them as Thanked

1

Search Reset | + New | File ▼ Edit ▼ ? Apply to Pledges **Thank You Letter - Contributions**

Favorites General Memory/Honor Other Gateway Contac

File menu:
- Apply Against Open Pledges
- Create Mass Email...
- Write Letter
- **Set Thank You Sent...** **2**
- Set Thank You Phone Call...
- Print...
- Print Preview...
- Update Cycle...
- Update Event...
- Update Payment Method...
- Set Tax Deductible Amount
- Add Allocation Fund
- Export...

Date Range: <custom, according to dates below>
Cycle: <ignore>
Event: <ignore>
Amount Range: minimum to maximum
Batch Code:

Edit | Sort | Format ▼ | Wrap | Export | Print | Pivot

Thank You Letter - Contributions [9 records found]

	ID	Date	Contact ID	Last Name	First Name	Amount	Applied Against Pledges	Open Pledges [Per Contact]	Deposited	Thank You Letter Sent	Thank You Date	Thank You Call Done	Check #	Street	Street 2
☑	46980	7/12/2017	15342	Clooney	George	2,061.86	.00	.00	☑	☐		☐	echeck	1417 Versailles Rd	
☑	46975	6/19/2017	12796	Kristenson	Joel	50.00	.00	.00	☑	☐		☐		9110 Golden Valley Rd	Apt 10
☑	46974	6/19/2017	15338	Henry	John	10.31	.00	50.00	☑	☐		☐	echeck	8164 Metal Head Rd	
☑	46973	6/16/2017	15337	Stewart	Samantha	46.39	.00	.00	☑	☐		☐		1855 Hennepin Ln E	
☑	46972	6/16/2017	15336	Angrist	Noam	190.72	100.00	.00	☑	☐		☐		Plot 142	Unit 4
☑	46966	6/12/2017	20	Abrahamian	David	25.00	.00	.00	☑	☐		☐		6012 Beard Ave S	
☑	46965	6/12/2017	4598	Langhoff	Renae	1,025.00	1,000.00	.00	☑	☐		☐		701 Oak Park Ln	Apt 71
☑	46964	6/12/2017	12796	Kristenson	Joel	125.00	.00	.00	☑	☐		☐		9110 Golden Valley Rd	Apt 10
☑	46963	6/12/2017	3632	Jablonski	Anna	75.00	.00	.00	☑	☐		☐	0123	23565 Birch Cir	
∑	9					3,609.28	1,100.00	50.00	9	0		0			

Make sure that just the donations that you printed a thank-you letter for are

Click **[OK]** to proceed with the update.
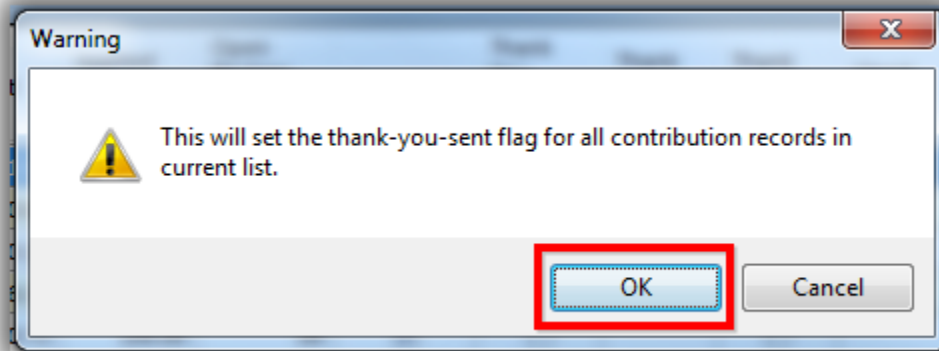
Click **[OK]** again when you're prompted that the update is complete.
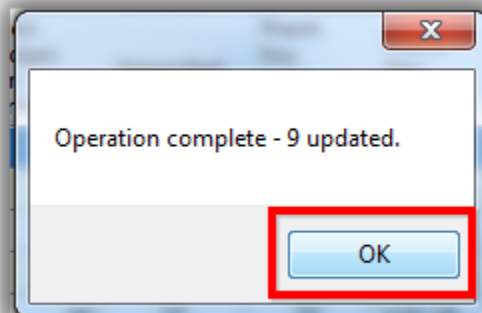
The list will reflect that the donations have been flagged as **thanked** and the **thank-you date** will be set to the date that you ran the mass update.

Write Thank You Letters (Receipts) to Donors and Flag them as Thanked

Reset the list (*if you entered search criteria*), and then click **[Search]** to refresh the list which will display any remaining 'un-thanked' donation records. *In this example all 9 donations were thanked and the list dropped to zero.*

Click [Search] to refresh the list. If you printed a thank-you receipt for all donations in the list the list will drop to zero.

Take a look at the **related resources** below for other articles and videos related to this topic.

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: How to Print Envelopes
Article: How to Print Mail-Merge Address Labels
Article: Inserting Donation Transactions into a Mail-Merge Letter (Primarily for Nonprofits)
Article: How to Print Household Labels
Article: How to Track Soft Credits using Contribution Notifications – ONLY for Nonprofit Customers
Article: How to Create a Year-End Tax Letter Addressed to Individuals or the Entire Household using Merge Fields – Nonprofit Only
Video: Getting Started 107 – Writing Contribution Thank You Letters
Video: Year End Tax Letter
Video: Thank A Person Once For Multiple Contributions
Video: Donation Auto Responder with Merge Fields
Video: Write Letter – Edit Letter after Mail Merge
Video: Getting Started 106a – Entering Contributions (NON PROFIT ONLY)
Video Playlist: Letter Writing

Trail Blazer Live Support

ⓒ   **Phone:** 1-866-909-8700
✉   **Email:**   support@trailblz.com
f   **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.