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Overview

This article shows how to flag donors as **“no thank you needed”**. This feature is useful in order to filter these donors from the Thank You Letter list when issuing donation receipts. For example, if a donor gives a monthly donation and they don’t want to receive a thank you receipt for each donation.

 **Tip:** [Click here](#) to learn how to **create attribute** folders and items (custom categories).

Steps

Create an attribute in a donor’s record with a name such as “Thank You Letter Not Needed”. *Example below.*

File Edit [Icons] Email

 **Mr. Robert (Bob) Kestnbaum [15325]**
 1333 Broadway
 Suite 301
 New York, NY 10018
 rkestnbaum1967@crm.com
 Home: 987-564-6548
 Work: 321-654-7897

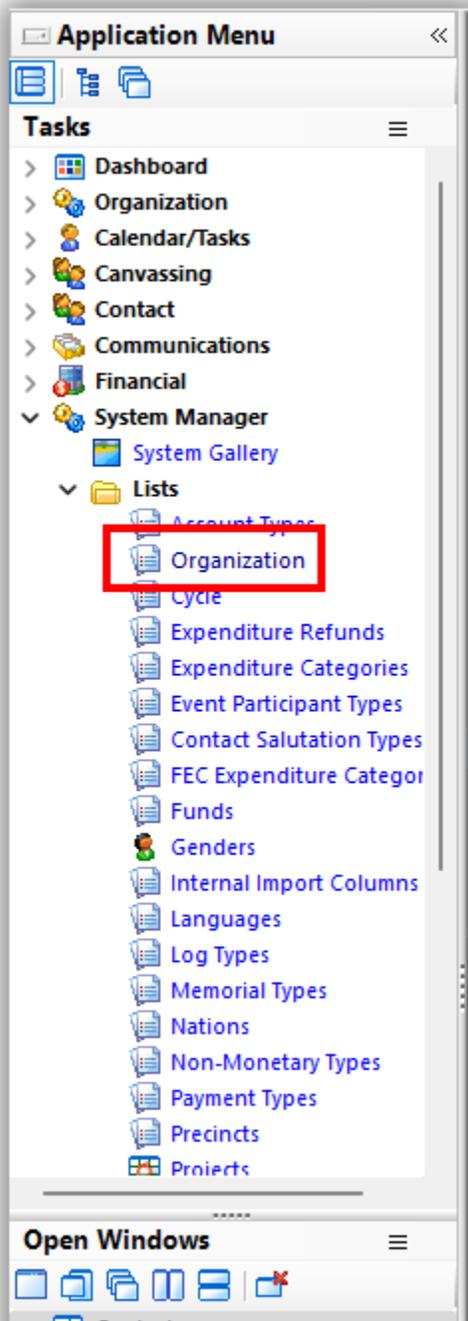
Dashboard | General | Household | Gallery | **Attribute** | Relation | Contribute | Pledge | Time | Event | Logs

Show Hidden Show Checked Only

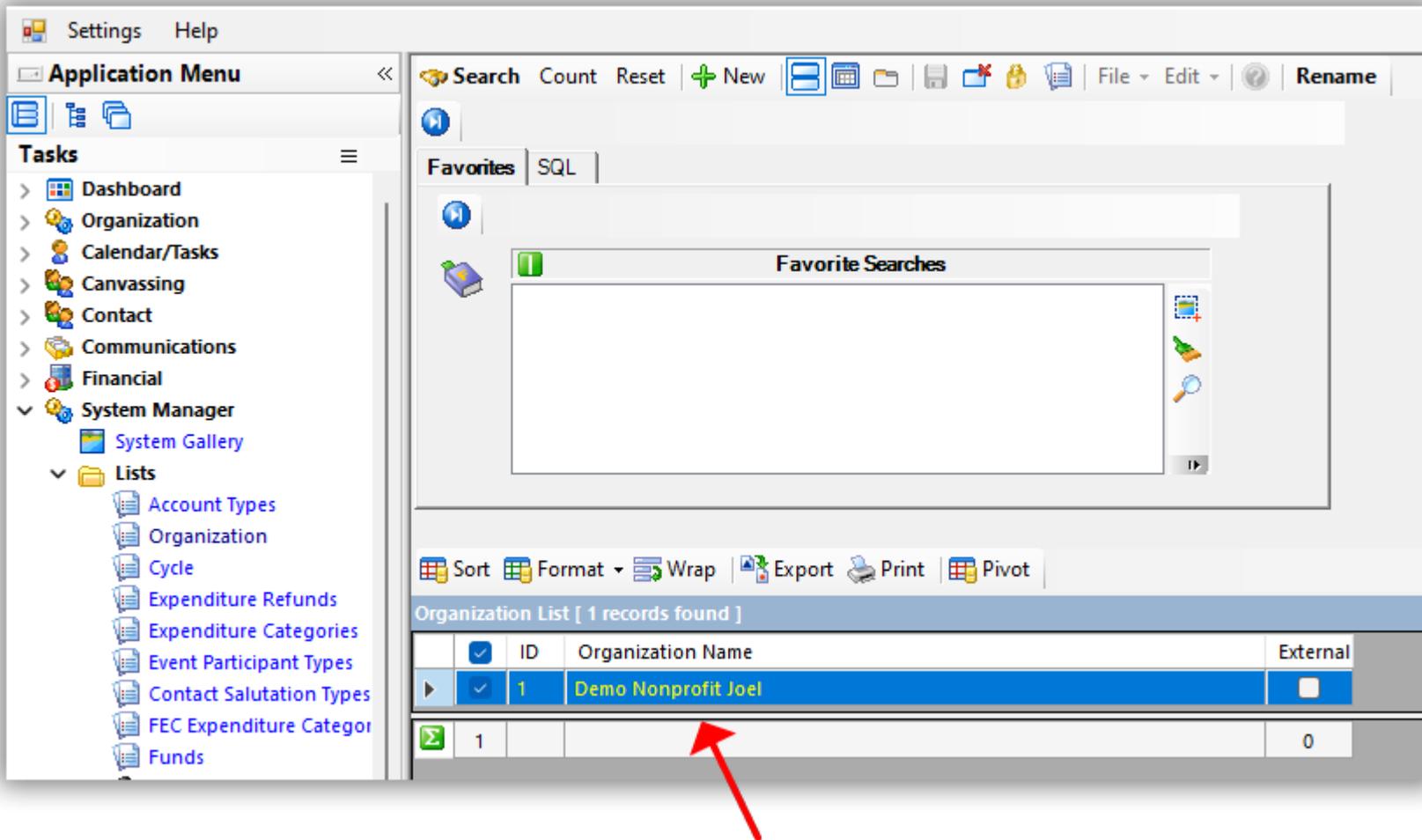
Attribute	Yes	Date	Note /
Attributes	<input checked="" type="checkbox"/>		
Contact Type	<input type="checkbox"/>		
Custom Form Check Boxes and Radio Buttons (Get/Post JS)	<input type="checkbox"/>		
Database Cleanup	<input type="checkbox"/>		
Donor Assigned Solicitor (Board Member)	<input type="checkbox"/>		
Donor Rating 1-10	<input type="checkbox"/>		
Event Attribute Folder #1	<input type="checkbox"/>		
Hidden Attribute for Custom Get Post JS Form	<input type="checkbox"/>		
Hiking Skill Level	<input type="checkbox"/>		
Junk Folders - Unable to Delete (Reuse)	<input type="checkbox"/>		
Mailings	<input type="checkbox"/>		
Membership Level	<input type="checkbox"/>		
Not (Hide/Archive Record) (System Default)	<input type="checkbox"/>		
Please select your email preferences	<input type="checkbox"/>		
Preferred Contact Method	<input type="checkbox"/>		
Select A SINGLE Rider to Donate Towards (Peer-to-Peer)	<input type="checkbox"/>		
Source of Record (System Default)	<input checked="" type="checkbox"/>		
Thank You Letter Not Needed	<input checked="" type="checkbox"/>	12/13/2021	
Volunteers	<input type="checkbox"/>		

Once the attribute has been created, navigate to your **Organization / Committee** record by following **System Manager > Lists > Organization**.
Example below.

Note: if you don't have access this part of the system, you'll need your database admin to assist. [Click here](#) to learn about user permissions.



Open your organization record. *My example is below.*



The screenshot shows the TrailBlazer interface. On the left is the 'Application Menu' with a 'Tasks' list including Dashboard, Organization, Calendar/Tasks, Canvassing, Contact, Communications, Financial, System Manager, System Gallery, and Lists. The 'Lists' section is expanded, showing various attributes like Account Types, Organization, Cycle, Expenditure Refunds, etc. The main window displays 'Favorite Searches' and an 'Organization List [1 records found]'. The list has columns for 'ID', 'Organization Name', and 'External'. One record is shown: ID 1, Organization Name 'Demo Nonprofit Joel', and External status '0'. A red arrow points to the 'Organization Name' column header.

ID	Organization Name	External
1	Demo Nonprofit Joel	0

Under the **Settings tab** you can **select the attribute** from the drop-down, which was created in the previous steps.

File ▾ Edit ▾  

Organization Information		Organization Continued	
Name:	Demo Nonprofit Joel	Phone:	(866) 909-8700
Address:	620 Mendelssohn Avenue North	Fax:	() -
:	Suite 186	Web Site	http://www.trailblz.info/demononprofitjoel
City:	Golden Valley	Alt Web Site	https://www.trailblz.info/demononprofitjoel/dc
State:	MN	E-Mail	jkristenson@trailblz.com
Zip Code:	55427	Date Organized:	<input checked="" type="checkbox"/> 9/29/2014 ▾
		Bank Account:	Parent Non Profit Bank ▾

Email | Representing/Active in | Related Committee(s) | Disclosure Settings | Dates and Cycles | **Settings**

Options | Filter | Notes

Options

Address Conform Method: Street direction on right (1372 Glenmoor Rd ▾)

Spouse:

Family:

Turn Polling On

Display Political Search Fields (affects non-profits only)

Contribution Histogram Bin Size:

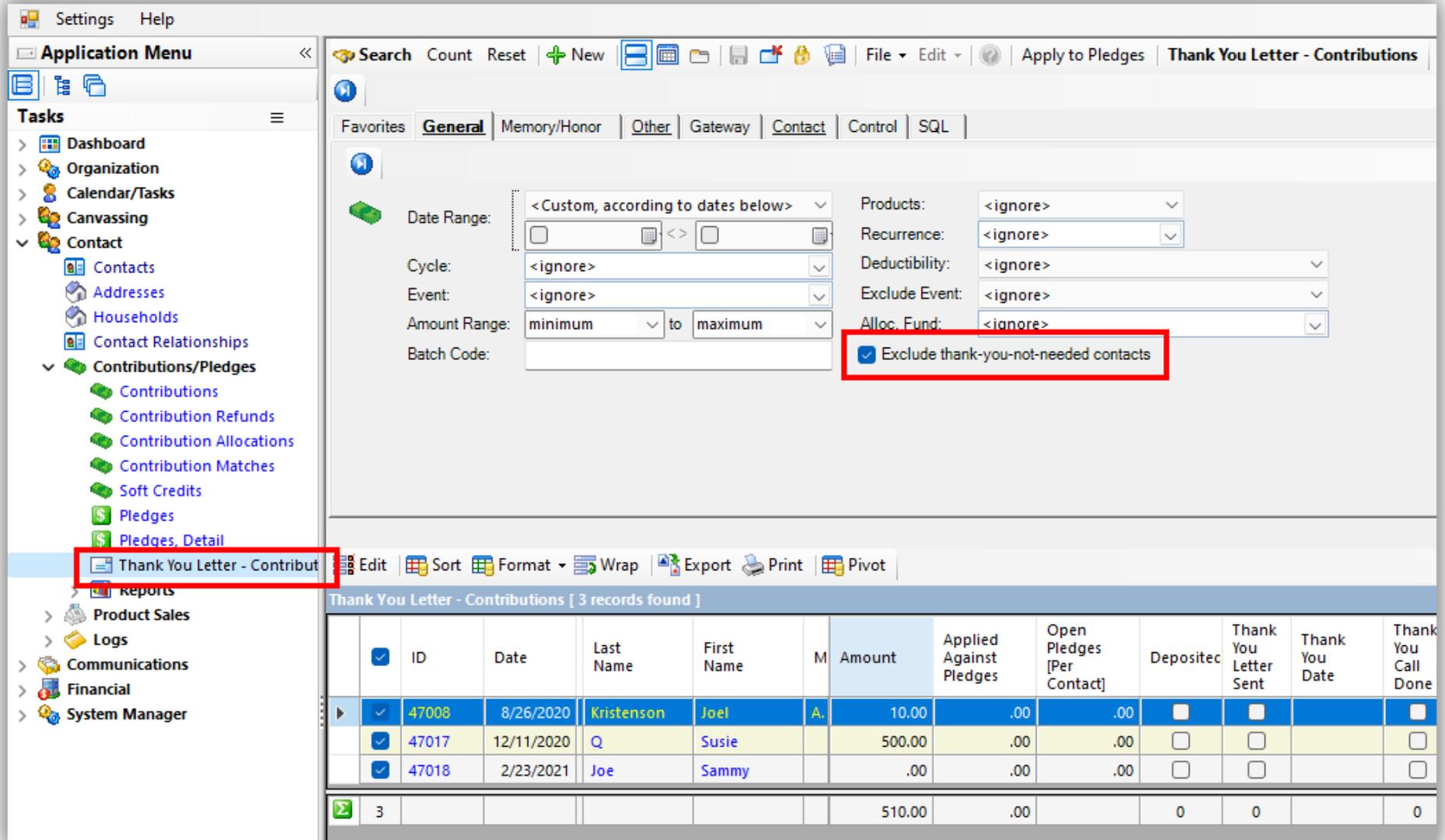
Attribute Selection

Thank-you-not-needed:

- Thank You Letter Not Needed ▾
- <not selected>
- Thank You Letter Not Needed

[Save and Close] the Organization record.

Navigate to the **Thank You Letter – Contributions** list. By default, donors that are flagged with the attribute you created **will be excluded** from this list.



The screenshot shows the TrailBlazer software interface. On the left is a navigation menu with categories like Dashboard, Organization, Calendar/Tasks, Canvassing, Contact, Contributions/Pledges, and Reports. The 'Thank You Letter - Contributions' option is highlighted in red. The main window displays the 'General' settings for this report, with the checkbox 'Exclude thank-you-not-needed contacts' checked and highlighted in red. Below the settings is a toolbar with options like Edit, Sort, Format, Wrap, Export, Print, and Pivot. At the bottom, a table displays 3 records found.

	ID	Date	Last Name	First Name	M	Amount	Applied Against Pledges	Open Pledges (Per Contact)	Deposit	Thank You Letter Sent	Thank You Date	Thank You Call Done
<input checked="" type="checkbox"/>	47008	8/26/2020	Kristenson	Joel	A.	10.00	.00	.00	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	47017	12/11/2020	Q	Susie		500.00	.00	.00	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	47018	2/23/2021	Joe	Sammy		.00	.00	.00	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Σ	3					510.00	.00		0	0		0

Note: You can uncheck the box called “Exclude thank-you-not-needed contacts” if you want to include them in the list.

The related resources below provide quick links to other useful articles and videos.



Trail Blazer™

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

Related Resources

Article: [Create Attribute Folders and Items](#)

Article: [Writing Donor Thank You Letters](#)

Article: [How to Perform Mail-Merge with Trail Blazer and Microsoft Word](#)

Video: [Attributes – Adding New](#)

Video Playlist: [Letter Writing](#)

Trail Blazer Live Support

 **Phone:** 1-866-909-8700

 **Email:** support@trailblz.com

 **Facebook:** <https://www.facebook.com/pages/Trail-Blazer-Software/64872951180>

 **Twitter:** <https://twitter.com/trailblazersoft>

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