Send Year End Letters

It's the end of the calendar year, your fiscal year, or both, and it is time to send year end thank you notes to all your supporters for the year. While you can send regular Thank You notes using the Send Gift Thank Yous as outlined here, we have made it easy for those year end thank yous, with the Send Year End Letters feature in **Donor CRM**.

Gifts > Send Year End Letters

The process is very similar to the Send Gift Thank Yous, with a few additions:

- Go into your **Donor CRM** account.
- Open the **Communication** category from the left navigation.
- Click **Send Year End Letters**
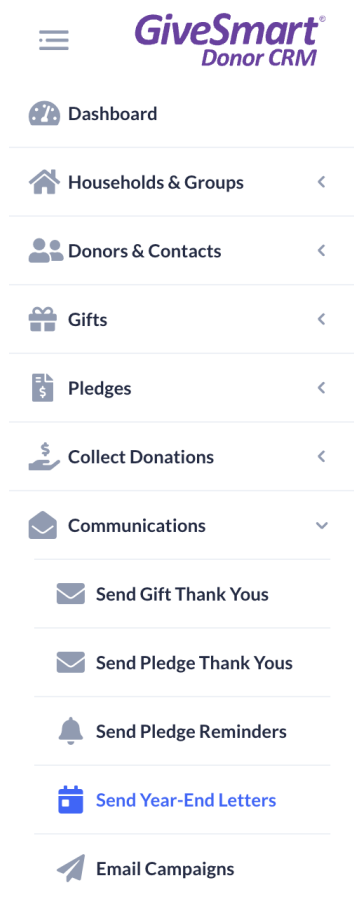
- You will go to the **Year End Thank You Letter** section.

	Search...						Opener'22 ▾			N Navatha

Year-End Thank You Letters   📄 DOWNLOAD EXCE

Status	From	To			Send as	Template	
Pending ▾	📅 Jan 1, 2022	📅 Dec 31, 2022			Letter Only ⌃	EOY Template Sample ▾	PREVIEW (8) THANK YOU LETTERS

Send as dropdown:
- **Letter Only**
- Email Only
- Letter & Email
- Last Sent Type

CLEAR ALL ⚙	Status	Last Sent Type	Last Destination	Donor	Last Gift Da	Amount ⇅	Total Gifts Amount ⇅	Total Gifts ⇅	Sent
☑	PENDING	Letter Only	Address,	Nav Measdai	29 Dec, 202	$25.00	$40.00	2	☐
☑	PENDING	Letter Only	Beat Stage,	Aksamit Empl	29 Dec, 2022	$250.00	$275.00	2	☐
☑	PENDING	Letter Only	Beat Stage,	David Noize	14 Jul, 2022	$15.00	$40.00	2	☐
☑	PENDING	Letter And Email	Address: 06 Hovde Park, Guadalupe, 3040-662	Farris Sawbridge	13 Jul, 2022	$53.00	$53.00	1	☐
☑	PENDING	Letter Only	Alter Stage,	Catchy Perfect	08 Jul, 2022	$5.00	$5.00	1	☐
☑	PENDING	Letter And Email	Email: taco@main.com	Thor Hemingway	07 Jul, 2022	$25.99	$25.99	1	☐
☑	PENDING	Email Only		Maxy Wilshin	20 Jan, 2022	$64.00	$64.00	1	☐
☑	PENDING	Letter Only	NO ADDRESS, Austin, Texas 79001	Reg23rd Smith-Country	17 Jan, 2022	$41.00	$41.00	1	☐
Summary Totals			Count: 8						

As shown in the **Last Sent Type** column, by default it will show all the types of contact you may have sent, including none or No Thank You. Because the Year End Thank You Letters group a donor's contributions into a single line, you will only see the last type of communication that was sent on the last donation. If they have donated at other times during the year, you will see the Total Gift Amount and Total Gifts, but not each individual gift they have sent.

The reason is that you are sending them a consolidated Year-End thank you, so you don't want to spam them with the same Year End Thank You several times, if they have donated several times throughout the year.

Filtering your list

You can filter your list in different ways by choosing the appropriate drop-down menu at the top of the section.

Year-End Thank You Letters   📄 DOWNLOAD EXCEL

Status	From	To			Send as	Template	
Pending ▾	📅 Jan 1, 2022	📅 Dec 31, 2022			Letter Only ▾	EOY Template Sample ▾	PREVIEW (8) THANK YOU LETTERS

Status

You can filter by status by choosing between the following:

- All Statuses
- Pending
- Sent

Date Range

Your Year-End may be From January to December, or July to June or anything. Maybe you want to do a six-month Thank You. You can choose whatever date range you prefer by clicking on the **To** drop-down and the **From** drop-down.

Send as

Send as allows you to select the method by which you want to send the End of Year Thank you Letter to the Donor. This includes:

- Letter Only
- Email Only
- Letter & Email
- Last Sent Type

Attach a Template

You can use the Template drop-down to use an existing Thank You Template or you can add a new one from the menu.

Template

| Test | ^ |

Add New +	
Test	✏ ✖
s	✏ ✖

Add a Template

If you click **Add New +** it will show you the Create template pop-up window to configure the details and write your letter template.

Create template   ✕ CANCEL

Template title

New Template

☐ Page Layout Options

☑ Gift Listing Block Configuration

| Gift Date | ∨ | | Amount | ∨ | | Solicitation | ∨ |

⊕ ADD FIELD

Template content

12pt ⇅ 1.2 ⇅ Serif ⇅ **B** *I* U̲ S̶ ▬ „ ☰ ☰ ☰ ☰ ☰ A ✎ 🖼 Ix

Insert text here ...

Gift Listing Block Configuration

The Year-End Thank You Letter template includes a Gift listing Block which is intended to list all gifts the Donor gave for the year. This option is checked by default and a maximum of 6 fields can

be displayed. The selectable fields are: Gift Date, Amount, Solicitation, Asset Gift Date, Asset Amount, General Ledger, Sub Solicitation, Campaign, FMV (Fair Market Value), TDA (Tax deductible Amount) and Quantity.

You can add or edit to your template as desired and described here.

Previewing and Sending Thank Yous

.When you are ready to send, it is the same process as any other Gift Thank You message:

- Click Preview
    - This also shows you the count of how many thank you letters you are sending.
- Review your messages with the donors information in the letter or email.
    - If the email address or mailing address is missing, you will get a notification on the top right corner
- Click Next Step - Choose Destination
-

If there is any missing data, the Next Step-Confirm and Send will be disabled. Add any missing Email/Mailing address using the Edit Contact button.

-

Total 16 thank you letters (including 8 emails and 8 letters).

<table>
<tr><td>GO BACK</td><td>SEND TEST EMAILS</td><td>NEXT STEP - CONFIRM AND SEND</td></tr>
</table>

4 emails and 1 letter missing destination

Donor	Type	Destination
Thor Hemingway	Letter	
Thor Hemingway	Email	taco@main.com
Aksamit Empl	Letter	Beat Stage,
Aksamit Empl	Email	This contact doesn't have any emails. Click to EDIT contact.
David Noize	Letter	Beat Stage,
David Noize	Email	This contact doesn't have any emails. Click to EDIT contact.
Catchy Perfect	Letter	Alter Stage,
Catchy Perfect	Email	This contact doesn't have any emails. Click to EDIT contact.
Nav Measdai	Letter	Address,
Nav Measdai	Email	This contact doesn't have any emails. Click to EDIT contact.
Reg23rd Smith-Country	Letter	NO ADDRESS, Austin, Texas 79001
Reg23rd Smith-Country	Email	qajunky14+reg2020@gmail.com
Maxy Wilshin	Letter	05 Oneill Road, La Cruz, 111711

- Click on Next Step-Confirm and Send
  - It will generate the letters in a PDF that you can review and print
  - You can click on the download box in the upper right to view and print the letters.
- Click Next to go to print envelopes
  - Adjust anything you want for the envelopes from the preview
  - Click Print Envelopes for it to create a PDF file
  - You can click on the download box in the upper right to view and print the envelopes.

Thank You Merge Field Options

- System Fields
  - Organization/Client Name
  - Long Today's Date
  - Mid Today's Date
  - Short Today's Date
  - User's Name
- Contact Fields
  - Address Block Options
    - Address Block Full Name
      -

Stephanie Hann

#Address Block Full Name
{Address Block Line 1}
{Address Block Line 2}
{Address Block Line 3}
{Address Block Line 4 – if necessary}
{Address Block Line 5 – if necessary}
{Address Block Line 6 – if necessary}
{Address Block Line 7 – if necessary}

- - - **Salutation**
      -
        ```
        {salutation only information}
        Stephanie and Chris Havely or Stephanie Hann and Chris Havely

        #Address Block Salutation
        {Address Block Line 1}
        {Address Block Line 2}
        {Address Block Line 3}
        {Address Block Line 4 - if necessary}
        {Address Block Line 5 - if necessary}
        {Address Block Line 6 - if necessary}
        {Address Block Line 7 - if necessary}
        ```
    - **Salutation and Last Name**
      -
        ```
        {salutation} + {last name}
        Stephanie and Chris Havely

        #Address Block Salutation and Last Name
        {Address Block Line 1}
        {Address Block Line 2}
        {Address Block Line 3}
        {Address Block Line 4 - if necessary}
        {Address Block Line 5 - if necessary}
        {Address Block Line 6 - if necessary}
        {Address Block Line 7 - if necessary}
        ```
    - Title
    - First Name
    - Last Name
    - Suffix
    - Salutation
    - Address 1
    - Address 2
    - Address 3
    - Address 4
    - City
    - State
    - Zip
    - Donor ID
- Gift Block Listing Fields
  - Gift Listing Block
  - Total Gifts Amount
  - Total Gifts
  - Date Range
- Contact Custom Fields