

Send Year End Letters

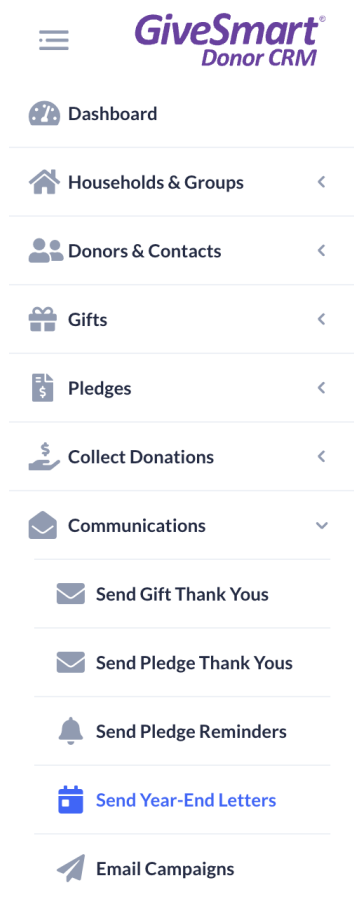
Last Modified on 06/27/2024 1:30 pm EDT

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 EXCEL

Status: Pending | From: Jan 1, 2022 | To: Dec 31, 2022

Send as: Letter Only | Template: EOY Template Sample | PREVIEW (8) THANK YOU LETTERS

	Status	Last Sent Type	Last Destination	Donor	Last Gift Date	Email Only Letter & Email Last Sent Type	Amount	Total Gifts Amount	Total Gifts	Sent
<input checked="" type="checkbox"/>	PENDING	Letter Only	Address,	Nav Measdal	29 Dec, 2022		\$25.00	\$40.00	2	<input type="checkbox"/>
<input checked="" type="checkbox"/>	PENDING	Letter Only	Beat Stage,	Aksamit Empl	29 Dec, 2022		\$250.00	\$275.00	2	<input type="checkbox"/>
<input checked="" type="checkbox"/>	PENDING	Letter Only	Beat Stage,	David Noize	14 Jul, 2022		\$15.00	\$40.00	2	<input type="checkbox"/>
<input checked="" type="checkbox"/>	PENDING	Letter And Email	Address: 06 Hovde Park, Guadalupe, 3040-662	Farris Sawbridge	13 Jul, 2022		\$53.00	\$53.00	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	PENDING	Letter Only	Alter Stage,	Catchy Perfect	08 Jul, 2022		\$5.00	\$5.00	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	PENDING	Letter And Email	Email: taco@main.com	Thor Hemingway	07 Jul, 2022		\$25.99	\$25.99	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	PENDING	Email Only		Maxy Wilshin	20 Jan, 2022		\$64.00	\$64.00	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	PENDING	Letter Only	NO ADDRESS, Austin, Texas 79001	Reg23rd Smith-Country	17 Jan, 2022		\$41.00	\$41.00	1	<input type="checkbox"/>
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: Pending | From: Jan 1, 2022 | To: Dec 31, 2022

Send as: Letter Only | Template: EOY Template Sample | PREVIEW (8) THANK YOU LETTERS

Status

Status

Pending ^

All Statuses

Pending

Sent

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.

Year-End Thank You Letters

DOWNLOAD EXCEL

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

Donor	Last Gift Date	Last Gift Amount	Total Gifts Amount	Total Gifts	Sent
Nav Measdal	29 Dec, 2022	\$25.00	\$40.00	2	<input type="checkbox"/>
Aksamit Empl	29 Dec, 2022	\$250.00	\$275.00	2	<input type="checkbox"/>
David Noize	14 Jul, 2022	\$15.00	\$40.00	2	<input type="checkbox"/>
Farris Sawbridge	13 Jul, 2022	\$53.00	\$53.00	1	<input type="checkbox"/>
Catchy Perfect	08 Jul, 2022	\$5.00	\$5.00	1	<input type="checkbox"/>
Thor Hemingway	07 Jul, 2022	\$25.99	\$25.99	1	<input type="checkbox"/>

Send as

Send as

Letter Only ^

Letter Only

Email Only

Letter & Email

Last Sent Type

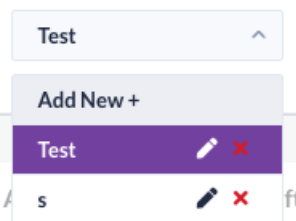
Send as allows you to select the method by which you want to send the End of Year Thank you Letter to the Donor. This includes:

- 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

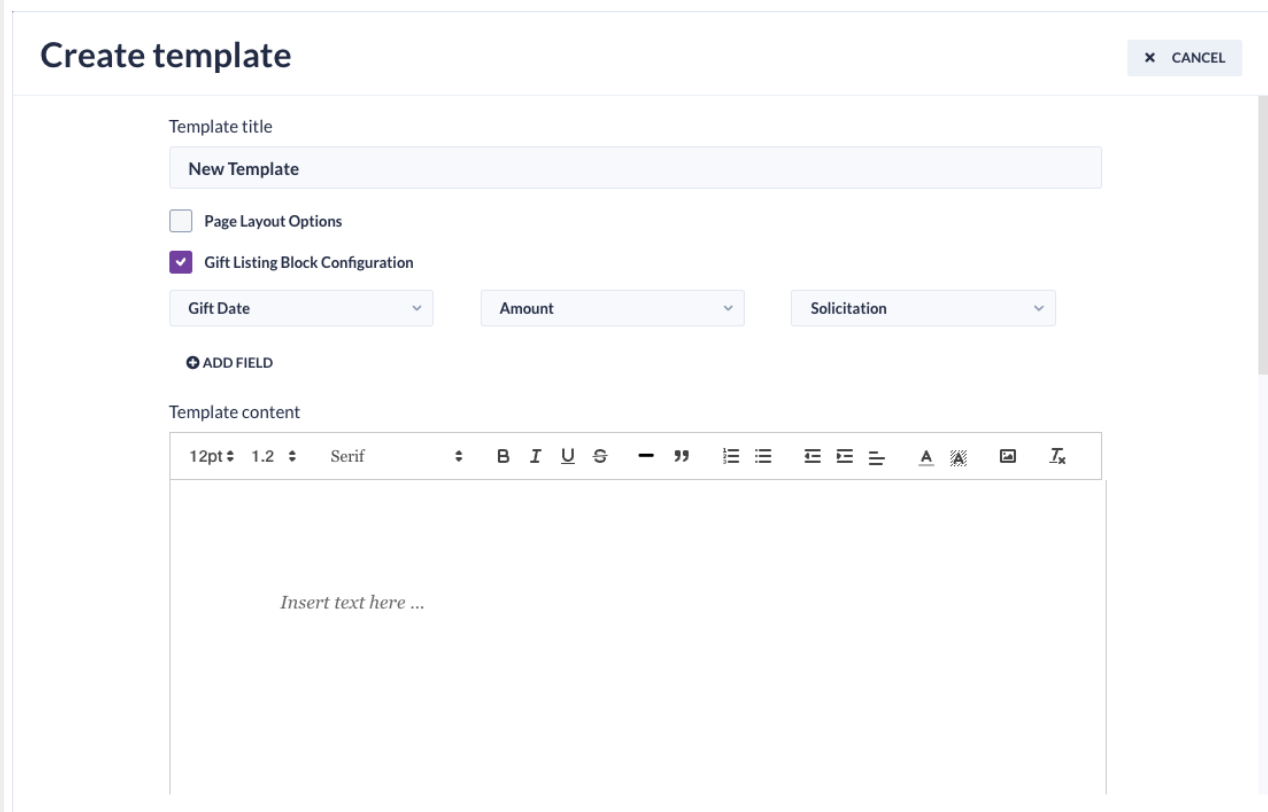
Add New +

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 U S - ” ☰ ☷ ☹ ☹ ☹ A ✎ 📎 ✎

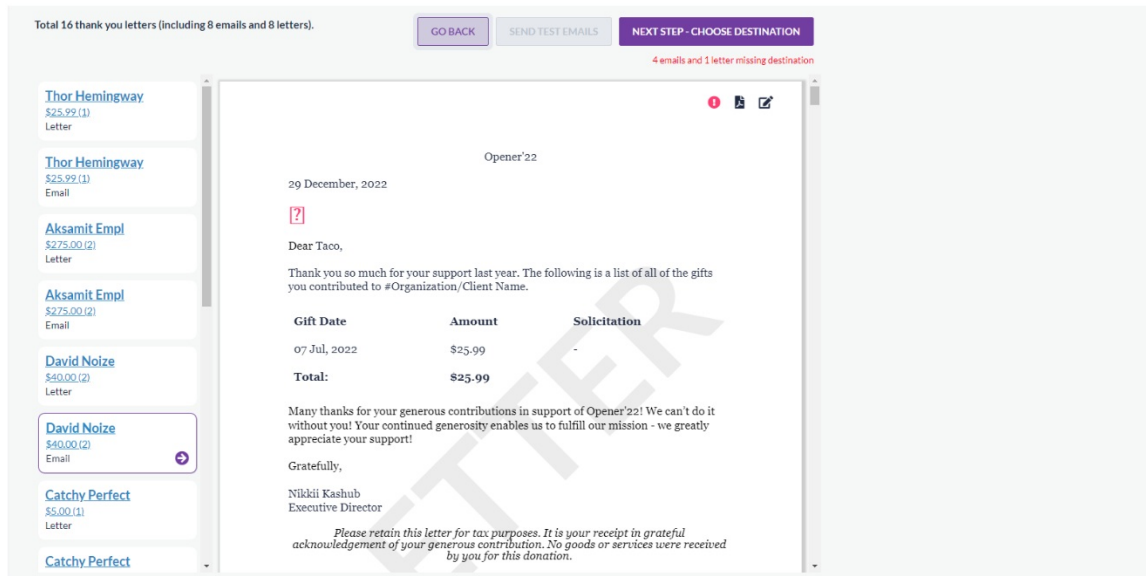
Insert text here ...

You can add or edit to your template as desired and described [here](#).

Previewing and Sending Thank You's

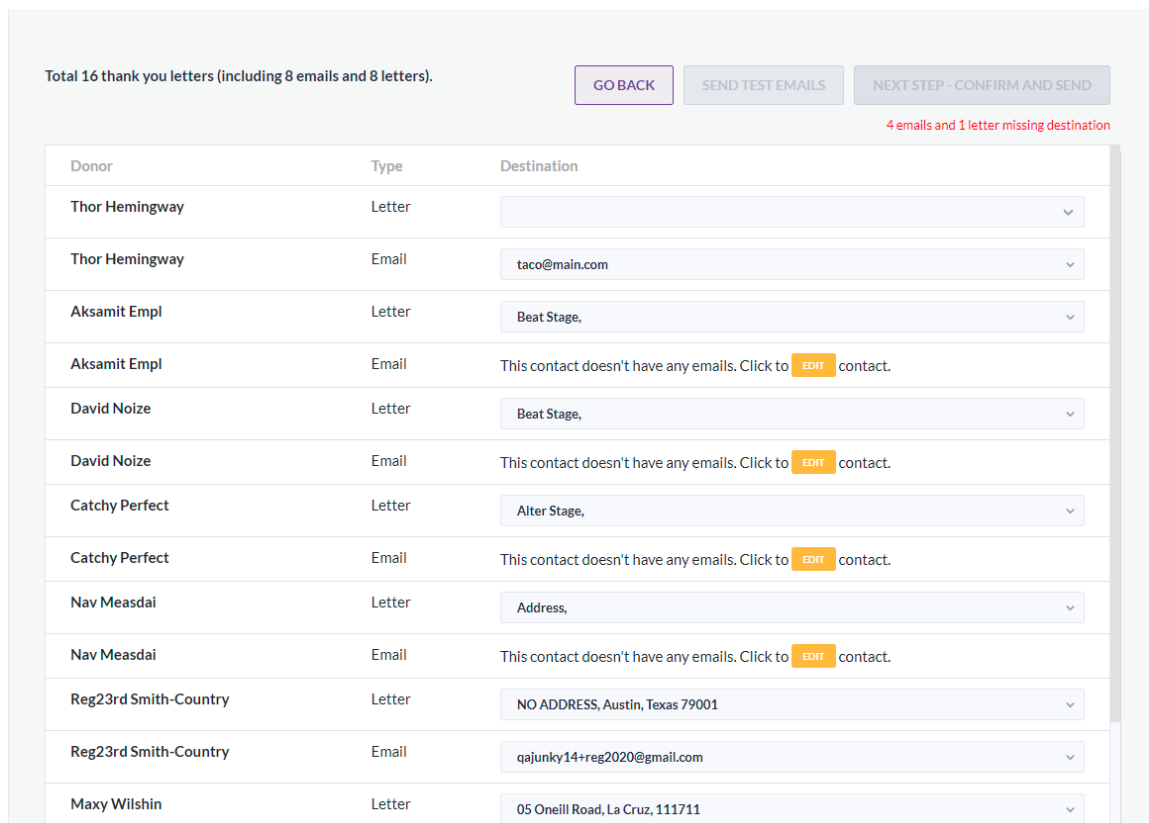
.When you are ready to send, it is the **same process as any other Gift Thank You message:**

- 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.

-



- Click on Next Step-Confirm and Send

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

Thank You Merge Field Options

- System Fields
 - o Organization/Client Name
 - o Long Today's Date
 - o Mid Today's Date
 - o Short Today's Date
 - o User's Name
- Contact Fields
 - o 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}
```

- o Title
- o First Name
- o Last Name
- o Suffix
- o Salutation
- o 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
-