

Sending Thank Yous

In CiviCRM, Thank You letters are produced as pdf files that can be printed and mailed to your donor. The process is that you select a set of contributions that have not had the thank you date updated, print the mailing labels, then reselect the contributions, select a template, create the pdf letter and update the thank you letter date so that they are not printed again. You can also print mailing labels using the same process.

Setup

Before printing thank you letters, you'll want to set up a message template with your default settings. While you can create Thank You Letters on the fly, this approach will standardized your work and save you time in the long run. A properly configured template can be reused with little editing. In PowerBase, we provide a sample thank you letter format called **Powerbase Thank You Letter Template v1**. It's meant to be a sample layout showing the relevant tokens used in a Thank You Letter. These tokens are only displayed in the token list when you are in the process of sending a thank you letter, which we describe next. Using the provided template, you can make your own template in advance of the first time you create thank you letters.

Templates can be accessed at **Mailings>Message Templates**. They are configured using the html editor that is used for all online pages and emails in PowerBase, the only difference being that they will be printed and not sent as email or displayed in a web browser. They work in conjunction with the default pdf letter size that is set by default. You can override the default size by creating your own Print Page(PDF) format from the option on the System Configuration menu available by going to **Administer>Administration Console**.

There are special tokens for Thank You Letters that are only populated when you run the Thank You Letter process. They are:

- {contribution.receive_date}
- {contribution.total_amount}
- {contribution.net_amount}
- {contribution.contribution_source}
- {contribution.campaign}

The PowerBase Support team is available to help with setting up your basic pages if you need it.

Printing Mailing Labels

To print the mailing labels, go to **Search>Advanced Search**. Find the **Contributions** "accordion" and expand it. Select completed contributions where "Thank-you sent" is "No". If you have a lot of old ones out there, you can limit the search by date. Press **Search**.

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Contributions

Contribution Dates
- any -

Contribution Amounts
From To

Payment Method
- any -

Thank-you sent? Yes No (clear)

Receipt sent? Yes No (clear)

Contribution is a Test? Yes No (clear)

Financial Type
- any -

In Honor Of

Personal Campaign Page
- any -

Currency
- any -

Campaigns
- select -

Contribution Status
 Completed Pending Cancelled Failed Refunded

Transaction ID

Contribution is Pay Later? Yes No (clear)

Contribution is Recurring? Yes No (clear)

Contribution Page
- any -

Contribution Source

Personal Campaign Page Honor Roll? Yes No (clear)

The list you get will be contacts who need a thank you. On the drop down list of Actions, Select “Mailing Labels”. Follow the instructions on the subsequent pages to create a PDF of labels. When printing the PDF file, make sure you deselect the option to “resize to fit the page”. If you fail to do that, your labels will not align properly.

Printing Thank You Letters

To print Thank You Letters, repeat the search you did above with one change. Go to **Search>Advanced Search**. Find the **Display Results Option** in the first row on the right side. Select the option to display results as Contributions.

Display Results As [?]
Contributions

Search in Trash
(deleted contacts)

Search

Reset Form

Continue the search as before. Find the **Contributions** “accordion” and expand it. Select completed contributions where “Thank-you sent” is “No”. If you have a lot of old ones out there, you can limit

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the search by date. Press **Search** which will bring up a list of contributions for that do not have a thank you date.

1. Select All Records, and take the action of “Thank-yous for Contributions”.
2. Select the template that you created for Thank You Letters.
3. Add the date in the body of the mail.
4. Click Make Thank-you Letters.

We recommend that you **NOT** select the “Update thank-you dates for these contributions” until you have run the thank you letters enough to know that you are comfortable with how they look at print.

When the pdf file is created, open it in acrobat. Select print. Select the option to print the document actual size.