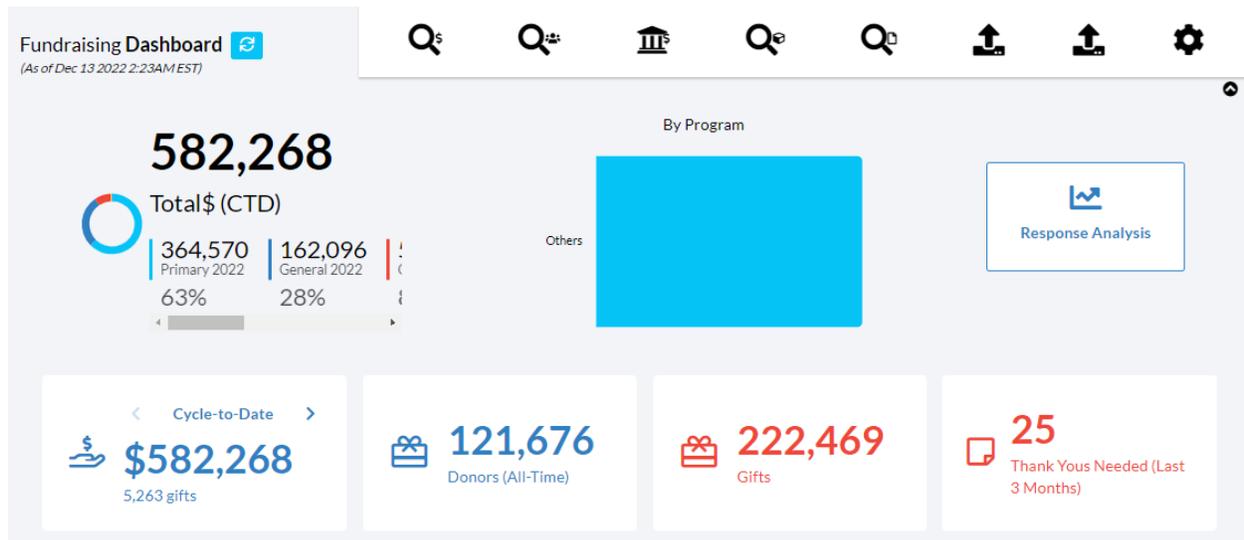


The **Thank You List Select** tool is useful in generating lists of donors who need to be sent thank-you correspondence.

***Please note, the results will be on a transactional level so if a donor has made more than one gift in the time period selected and neither gift has been thanked yet, they will pull into the output once for each gift that fits the criteria.*

1. Under the **Fundraising Dashboard**, select **Thank You's Needed** card to open a Thank You list select search window.



2. Use the Filter tab options to select the criteria needed to build your list of donors who need to be thanked and the Output tab options to select which information will be provided in an export.

The screenshot shows the 'Thank You' search window with the following elements:

- Filters** tab selected.
- Batch Date** dropdown menu set to 'Last 3 Months'.
- Select Another Filter** button with a plus sign.
- Output Fields** and **Result** tabs.
- Selected Only** toggle switch.
- Search Filters** search bar.

3. Once your search criterion has been entered, click the **Run** button.

Note: If you click the red  button at any time, the Search Panel will clear all of your selection criteria and allow you to start a new thank-you list search.

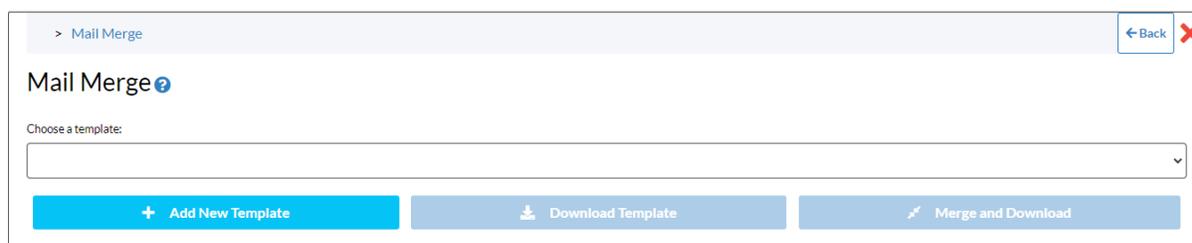
4. The Thank You select will pull a list of donors based on the criteria that you entered.

5. To view a record, click the  button to the left of the record.

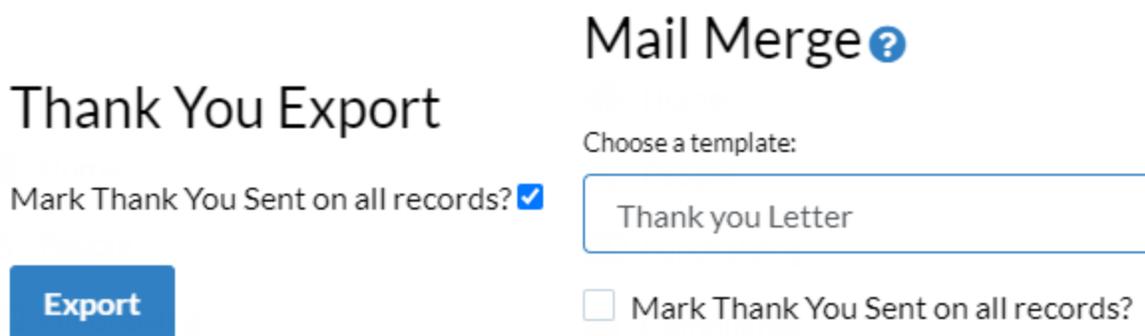
6. To save a list, click the  button in the bottom left corner or to run a **Mail Merge** click



- If you select **Mail Merge** a new window will appear where you can either choose a template or add a new template for the merge. The template will need to be a Microsoft Word document setup for mail merge. For more information please view the [Mail Merge](#) guide.



7. You will also have the option to mark that all of these donors have been sent a thank you note by clicking Yes or No. **If you select Yes, then these records will not pull in your future selects.**



If you haven't been using this feature to send Thank You's previously, you may want to do a quick select of previous gifts and just mark them as "thanked" to avoid accidentally selecting them in the future.

9. Either click  or . Open your Excel export and use the results to start sending thank you notes or send your Thank You letter prepared by mail merging.