

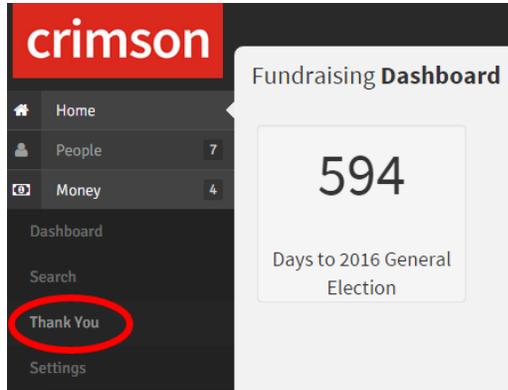


Quick Reference – Thank You List Select

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 **Money** menu, select **Thank You** to open a Thank You list select search window.



2. Use the drop-down menu options to select the criteria needed to build your list of donors who need to be thanked.

The 'Thank You' search window displays a list of criteria for filtering donors. The criteria are:

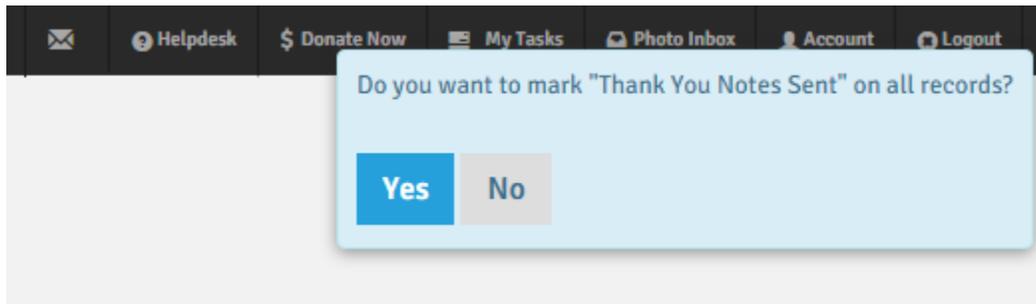
| Criteria | Operator | Value |
|----------------------------|-------------|-------|
| Fund Code | (Choose) | |
| Cycle-To-Date Total Gift\$ | Equal to | |
| Year-To-Date Total Gift\$ | Equal to | |
| Gift Amount | Equal to | |
| Batch Date | (Specify) | |
| Batch No. | Equal to | |
| Program Code | Equal to | |
| Initiative | Equal to | |
| Source Code | Starts with | |
| Flag | Equal to | |
| Club | Starts with | |

At the bottom, there is a 'Suppression' bar, a '0 records' indicator, an 'Export' button, a 'Reset' button, and a 'Search' button.

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

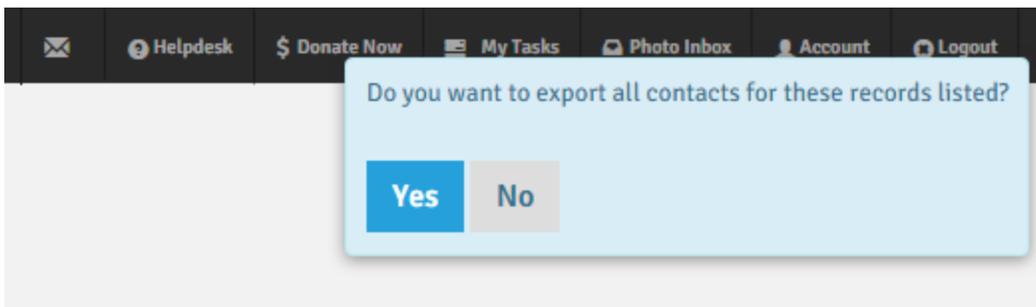
Note: If you click the red **Reset** button at any time, the **Search Panel** will clear all of your selection criteria and allow you to start a new thank-you list search.

- The Thank You select will pull a list of donors based on the criteria that you entered.
- To view a record, click the  button to the left of the record.
- To save a list, click the **Export** button in the bottom left corner.
- 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.

- Next a confirmation message will appear asking:



Select **Yes** if you'd like to download an Excel file that contains all contacts for each donor record that's included in the results or **No** if you want to only export the primary contact for each donor. If you choose to export all contacts then each transaction on the list will be repeated for each contact included in the donor's record.

- Open your Excel export and use the results to start sending thank you notes by mail merging the file into your Thank you letter template.