

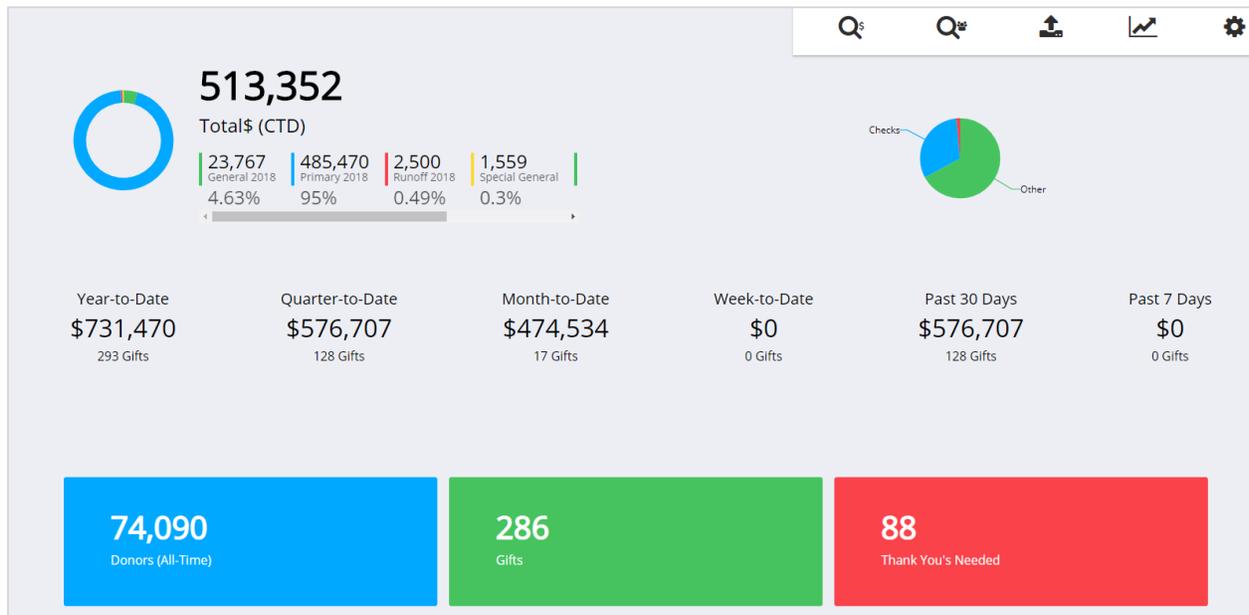


Crimson 3 – Thank You List Select

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 **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 sections:

- Filters:** Includes 'Gift' and 'Suppression' tabs.
- Output Fields:** A grid of filter boxes for: Fund Code, Cycle-To-Date Total Gift\$, Year-To-Date Total Gift\$, Gift Amount, Batch Date, Batch No., Program Code, Initiative, Source Code, and Flag.
- Buttons:** Save, Saved Searches, Recent Searches, Reset, and Run.

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

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.**

Thank You Export

Mark Thank You Sent on all records?



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. 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.