

How to Create Notification Letters

DonorPerfect Online

SofterWare, Inc.
DonorPerfect Online
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Introduction

Notification letters are used to acknowledge the receipt of donations that have been made in tribute to another party. A typical notification would be a letter sent to the person in whose honor, or to the family of the person in whose memory, a gift was made.

In either case, the gift is recorded in the donor's record as usual. In addition, the recipient of the notification is linked to the gift and the gift is recorded in the recipient's gift list with a Record Type of "Notification." The amount of the Notification type gift does not affect the recipient's giving totals.

Once a Notification gift is recorded, the associated notification letter is created as with any other acknowledgment letter during the normal Receipts and Acknowledgments Processing activity.

DonorPerfect Online enables you to instruct the system to send notification letters in two places: 1.) when you link a gift or pledge to another gift via the Link Gift function in the Gift or Pledge screen; 2.) when you apply a gift to a tribute via the Apply to Tribute function in the Gift screen.

The remainder of this document addresses the steps for:

- Linking a gift or pledge to effect a notification – pg. 1
- Creating notification letters with Receipts and Acknowledgments Processing – pg. 6
- Establishing a notification when applying a gift to a tribute – pg. 11

Although this document assumes that Microsoft Word will be used to create the notification letters, much of what is discussed here applies to creating notifications irrespective of the type of word processor.

Linking a Gift or Pledge to Effect a Notification

A donation that is made in honor of or to memorialize somebody is entered into the gift donor's record as you would any other gift or pledge. Then the Tribute Details area in the Gift or Pledge screen is used to enter the information about the person for whom the gift is being made and the Link Gift function, also on the Gift or Pledge details screen, is used to specify the party to whom a notification should be sent.

► To enter and link a gift

1. Use the **Search** function in the Navigation Bar as usual to search your database for an existing donor record or enter a new individual or organizational record.
2. Once you have found or entered the donor record, click the Gifts tab and the **Add Gift** button to open the Gift Entry screen as shown below in Figure 1.

Karl Baker (135)

Main Gifts Pledges Tributes Contacts Bio Other Info Link

Attach a File | Insta-Charge | Gift Narrative | Enter Split Gift | Link Gift | Apply to a Pledge | Apply to a Tribute

Gift Details

Gift ID # 1489

Date 11/2/2009

Record Type Gift

Gift Amount \$100.00

Batch No 0

Fair Mkt. Value \$0.00

TY Date 11/2/2009 5

Type of Gift Check

Pledge Payment

Reference ck 1234

Split Gift

General Ledger Unrestricted

Campaign

Solicitation UNSO

Sub Solicitation

Thank-you # In Memory Of

Associated Address MAIN - Mr. Karl Baker / 47 Cabot Street / Everett, MA 02149-3520

Gift Memo 11/2/2009 -
To remember Sid Cauley for all his great work on behalf of our organization.

Insert date

Tribute Details

Memorial or Honorarium In Memory Of

First Name Sid

Tribute Description

Last Name Cauley

Figure 1. Gift Entry Screen

- Fill in the Gift Details area as usual. The selection you make in the **Thank-you #** pull-down menu will dictate which acknowledgement letter will be created to thank the *donor*. In this case, we have assumed that you have created a specific acknowledgment letter for the purpose of thanking donors for memorial gifts.
- Fill in the Tribute Details area shown at the bottom of Figure 1. Make the appropriate selection in the **Memorial or Honorarium** field to record the intent of the gift.

Enter into the **First Name** and **Last Name** fields the *name of the person being honored or memorialized*. This is not necessarily the same name as that of the intended recipient of the notification. For example, in Figure 1 we have entered “Sid Cauley.” In following steps we will send a letter to John Cauley notifying him that a gift was made in memory of his father, Sid.

The contents of the **Memorial or Honorarium**, **First Name** and **Last Name** fields will be included in the mail merge data file subsequently created during the Receipts and Acknowledgments process and can thus be used in the Notification Letter.

- Click **Link Gift** to open the Linked Gifts screen and then **Lookup** to open the Lookup screen as shown below in Figure 2.

dp donorperfect.net https://interland5.donorperfect.net/prod/donorsearch.asp

Last Name/Org/ID#	Cauley	City	
First Name	John	State	
Opt. Line		Zip	
Address		Country	


Set Selection Filter...

Lookup Clear Fields

183 [Mr. John Cauley / 1830 Broadway / Ryan Iron Works / Raynham, MA](#)

Figure 2. Lookup Screen

6. Use the **Lookup** screen as usual to search for an *existing* constituent to which the notification letter will be sent.



Note: In order to use Receipts and Acknowledgments Processing to create the notification letter, the party being notified must exist in your constituent database. If it is not currently there, you must add it via the normal process under the **Search** function in the Navigation Bar.

7. Click the appropriate name in the list that appears below the Lookup screen. The system will return you to the Linked Gifts screen where the selected constituent's name will appear in the **Linked Name** field as shown below in Figure 3. Again, this is the party to whom the notification letter will be sent.

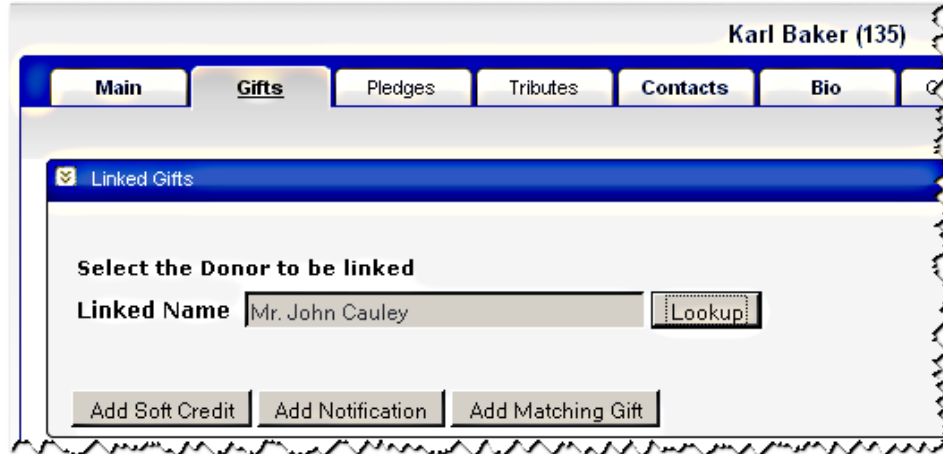


Figure 3. Completed Linked Gifts Screen

8. Click the **Add Notification** button. The system will display the Linked Gift detail screen, as shown below in Figure 4. This screen provides the details for the gift that will appear in the record of the *constituent being notified*.

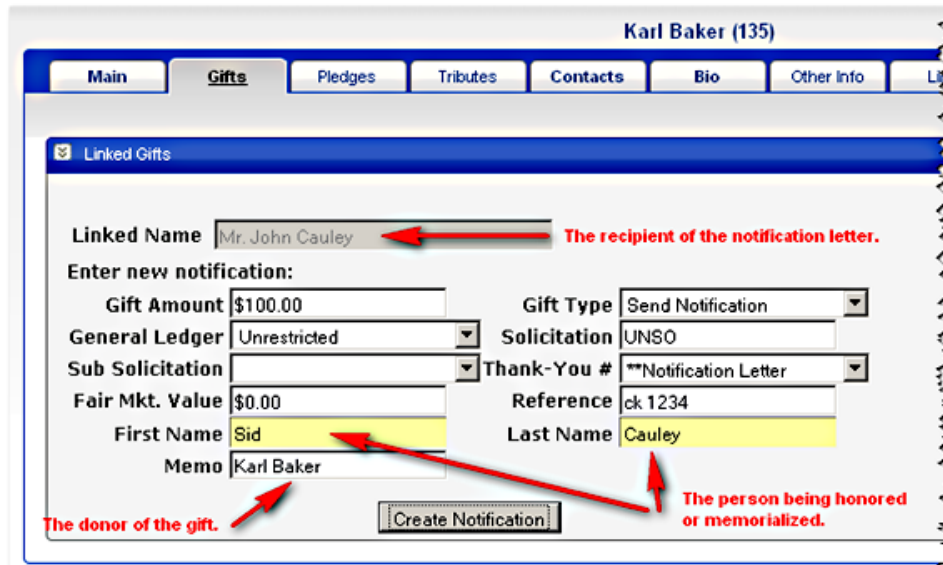



Figure 4. Linked Gift Details

Enter in the **Memo** field the name of the gift donor, in this case, “Karl Baker.” This information will also be available for use in the notification letter.

Note that the **Gift Type** was set automatically to “Send Notification” and the contents of the other fields in this screen were carried over from the original gift screen (Fig. 1). You can, however, modify them if necessary. For example, it is

likely that you will want to change the **Thank-You #** field to specify a letter that is more appropriate for a “notification” than the thank-you letter that was specified in the gift screen.



Note: DonorPerfect Online includes the capability to specify a default Thank-You # (as well as GL, Solicitation and Gift Type) to be used with notification type gifts. This can be accomplished on the Entry Parameters screen which is accessed by clicking **Settings** in the Navigation Bar, **Parameters** in the Settings menu and **Entry Screens** on the Parameters screen. However, even if these defaults have been established, they can be overwritten in the Linked Gift Details screen (Fig. 4).

Refer to the “Parameters” section of the *DonorPerfect Online User Manual* for more information on specifying defaults for notifications.

When you are finished modifying the Linked Gift screen, click **Create Notification**. The system will save the notification record and return you to the Linked Gifts screen where the new record will be listed, as shown below in Figure 5.

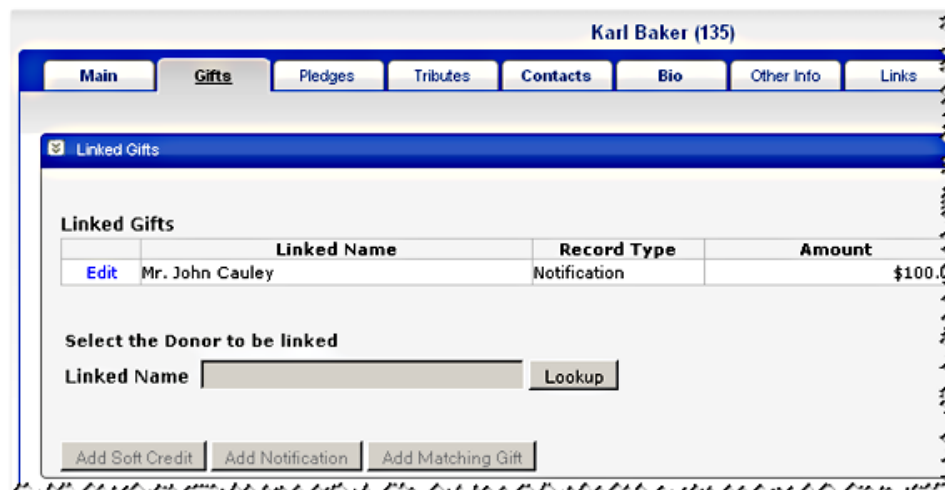


Figure 5. Linked Gifts Screen Showing Linked Gift

Click **Edit** next to the Linked Gifts listing to re-open the Linked Gift Details screen (Fig. 4) if you need to modify the linked gift.

- You can create additional notifications for this same gift by repeating steps 5 through 8 or click **Return to Gift Screen** (at the top right of the Linked Gifts screen) to close the Linked Gifts screen.

10. Click **Save** at the top right of the Gift Entry screen (Fig. 1) to return to the Gifts List on the Gifts tab.



Note: In addition to Notifications, the Linked Gifts screen (Fig. 3) is also used to link a gift to another donor's record for Soft Credits and Matching Gifts. Soft Credits are used to recognize one donor, such as a board member or other solicitor, for the contribution of another. Matching Gifts are used to enable you to enter an additional gift to be given to supplement the original donation, such as when an employer matches the gift of an employee.

Refer to the "Linking a Name to a Gift" section of the *DonorPerfect Online User Manual* for more information on linking gifts.

To summarize, at this point you will have entered the actual gift into the donor's record and linked that gift to the intended recipient of the notification. The gift list in the recipient's record will show this gift as a "notification."

The next step is to send the thank-you acknowledgment for the gift to the donor and the notification of the gift to the specified recipient. The thank you and notification letters will be created as with any other gift by the Receipts and Acknowledgments Processing function, as discussed below.

Creating Notifications with Receipts and Acknowledgments Processing

The Receipts and Acknowledgments processing function creates a distinct mail merge data file for each of the receipt and acknowledgment letter types that have been specified in the **Thank-You #** field in the gift and pledge records being processed. Thus, for example, there could be a data file for the "standard" thank-you letters, one for the "board member" thank-yous, one for the "in memory of" thank-yous, one for the "notification" letters, etc.

Each mail merge data file is given a file name in the form of "TY?? .csv." The "??" characters represent the code associated with the particular type of Thank-You Letter, as defined for the **Thank-You #** field in Code Maintenance. For example, the "In Memory Of" letter specified in the gift record shown in Figure 1 above may have a code of "25." The "Notification Letter" specified in the linked gift record shown in Figure 4 above may have a code of "44." The related mail merge data files would then have file names of "TY25.csv" and "TY44.csv," respectively.

Once the mail merge data files have been created, you can use your word processing program to merge them with the appropriate mail merge letter templates to produce the personalized acknowledgment letters that are needed. (For convenience, the mail merge letter templates should be given names which also include the Thank-You Letter code, such as "TY25_In_Memory_Of.doc" or "TY44_Notification_Letter.doc.")

Refer to the “Generating Receipts and Acknowledgments” section of the *DonorPerfect Online User Manual* for detailed information on using the Receipts and Acknowledgments Processing function.

The TY???.CSV Mail Merge Data Files

If you use the Default Financial Export Template in the Receipts and Acknowledgments process, each of the TY???.csv files will contain over 200 data fields taken from the main/bio, gift/pledge and address records of the constituents requiring receipt or acknowledgment letters. In addition to the standard fields used for acknowledgment letters, the fields listed in the following table are most likely to be of particular use in a notification letter:

Table 1. Notification Letter Data Fields			
Field Name in Data File	Field Name on Screen	Screen	Purpose
GFNAME	First Name	Tribute Details area of Gift Entry (Fig. 1)	The first name of the person being honored or memorialized.
GLNAME	Last Name	Tribute Details area of Gift Entry (Fig. 1)	The last name of the person being honored or memorialized.
GIFT_NARRATIVE	Memo	Linked Gift Details (Fig. 4)	The donor's name.
MEMORY_HONOR	Memorial or Honorarium	Tribute Details area of Gift Entry (Fig. 1)	The intent of the gift.

The creation of the mail merge letter template for notifications is discussed in the following section.

Creating the Mail Merge Letter Template for Notifications

The easiest way to create a mail merge letter template for notifications is to modify the sample letter template, `thankyouletter.doc`, which is available for download by clicking the **Mailings** button in the Navigation Bar and **Mail Merge Templates** in the **Mailings** menu.

The sample letter, `thankyouletter.doc`, is illustrated below in Figure 6. The data fields in the template that are highlighted in yellow refer to the fields from the mail merge data file that is to be merged with a mail merge letter template to form the *personalized* thank-you letters.

Honest Politics Foundation
10147 W. Grantosa Drive
Washington, DC 20178

November 12, 2009

«opt_line»

```
{ IF { MERGEFIELD org_rec } = "Y" { IF {MERGEFIELD first_name} > "" "{  
MERGEFIELD first_name } { MERGEFIELD last_name }  
""{ MERGEFIELD last_name }  
"}" { IF { MERGEFIELD opt_line } > "" "{ MERGEFIELD opt_line }  
" "" } } { MERGEFIELD address }  
{ MERGEFIELD address2 }  
{ MERGEFIELD city }, { MERGEFIELD state } { MERGEFIELD zip }
```

Dear «salutation»,

I am writing to thank you and the Abington High School for the generous support and assistance you have provided this year. Your donation of \$«amount» contributed to help us raise the standards of political discourse in our community.

As you know, each year the HPF provides the coveted Honest Politics Ethics Award to recognize the politician who stands above the others in honesty and integrity. We are currently in the process of identifying a sponsor for the award banquet and I would like you to consider this opportunity. I will contact you shortly to discuss the banquet and the results of this year's fundraising efforts.

Sincerely Yours, I

Arnold Goodman
President of the Board

Figure 6. Thankyouletter.doc Sample Letter

(Note that the somewhat intricate Microsoft Word “IF, Then, Else” statements in the address block of the sample letter above enable this single template to be used with both Individual and Organizational type constituents. Specifically they deal with the opt_line field, which is used differently in Individual and Organizational records. Luckily you don’t have to worry about this, if you simply leave the address block unchanged when you create your notification letter.)

► To create the notifications letter mail merge template

1. Open the thankyouletter.doc in Microsoft Word. If a message appears asking whether you want to run an SQL command to place data from a specified database in your document, click **No**. Change the text and format as required for

the notification letter. For example, you can change the wording or layout; you can add a logo or make room for your letterhead.

To add the other data fields to the template that you will need for the notifications letter, choose from among the fields in the file exported by Receipts and Acknowledgments Processing – “TY44.csv” in our example above. Use the Word Mail Merge Wizard (or, in Word 2007, the Mail Merge steps in the Ribbon toolbar) to insert the new fields.

2. Once you have made the needed changes, save the notification letter template in a known location (for example, the DPO Merge Directory, if you have created one), either in your computer or on the network. It will be very helpful if you use a name for this letter template that includes the Thank You Letter code for notification letters and a meaningful description, such as “TY44_Notification_Letter.doc.”

Figure 7 below shows an example of a notification letter mail merge template that was created by modifying the thankyouletter.doc sample.

As listed in Table 1 above, the fields <<GFNAME>> and <<GLNAME>> contain the name of the person being honored or memorialized, as entered into the **First Name** and **Last Name** fields in the Tribute Details area of the Gift Entry screen (Fig. 1). The <<GIFT_NARRATIVE>> field contains the name of the person making the donation, as entered into the **Memo** field in the Linked Gift Details screen (Fig. 4).



Note: The notification letter template shown in Figure 7 can be used for gifts both in memory of and in honor of an individual. If you prefer, you can create two separate notification letters with separate TY Letter codes, say “44” for “in honor of” gifts and “45” for “in memory of” gifts.

Another alternative is to use the **Memorial or Honorarium** field from the Tribute Details area of the Gift screen (Fig. 1) in a single letter to identify the purpose of the tribute.

Honest Politics Foundation
10147 W. Grantosa Drive
Washington, DC 20178

November 12, 2009

```
{IF {MERGEFIELD org_rec } = "Y" {IF {MERGEFIELD first_name} > "" "{  
MERGEFIELD first_name } {MERGEFIELD last_name }  
""{ MERGEFIELD last_name }  
"}{ IF {MERGEFIELD opt_line } > "" "{ MERGEFIELD opt_line }  
" "" }}{MERGEFIELD address }  
{MERGEFIELD address2 }  
{MERGEFIELD city }, {MERGEFIELD state } {MERGEFIELD zip }
```

Dear {MERGEFIELD salutation },

This is to inform you that a gift in tribute to «GFNAME» «GLNAME» has been made by «GIFT_NARRATIVE».

Sincerely Yours,

Arnold Goodman
President of the Board

Figure 7. Sample Notifications Letter Mail Merge Template

Figure 8 below shows the resulting notification letter after the merge process.

For a step by step outline of the Microsoft Word portion of the mail merge process, refer to the applicable one of the following documents in the DonorPerfect Online Document/Video Library: *Mail Merges in Word 2007*, *Mail Merges in Word 2002 or XP*.

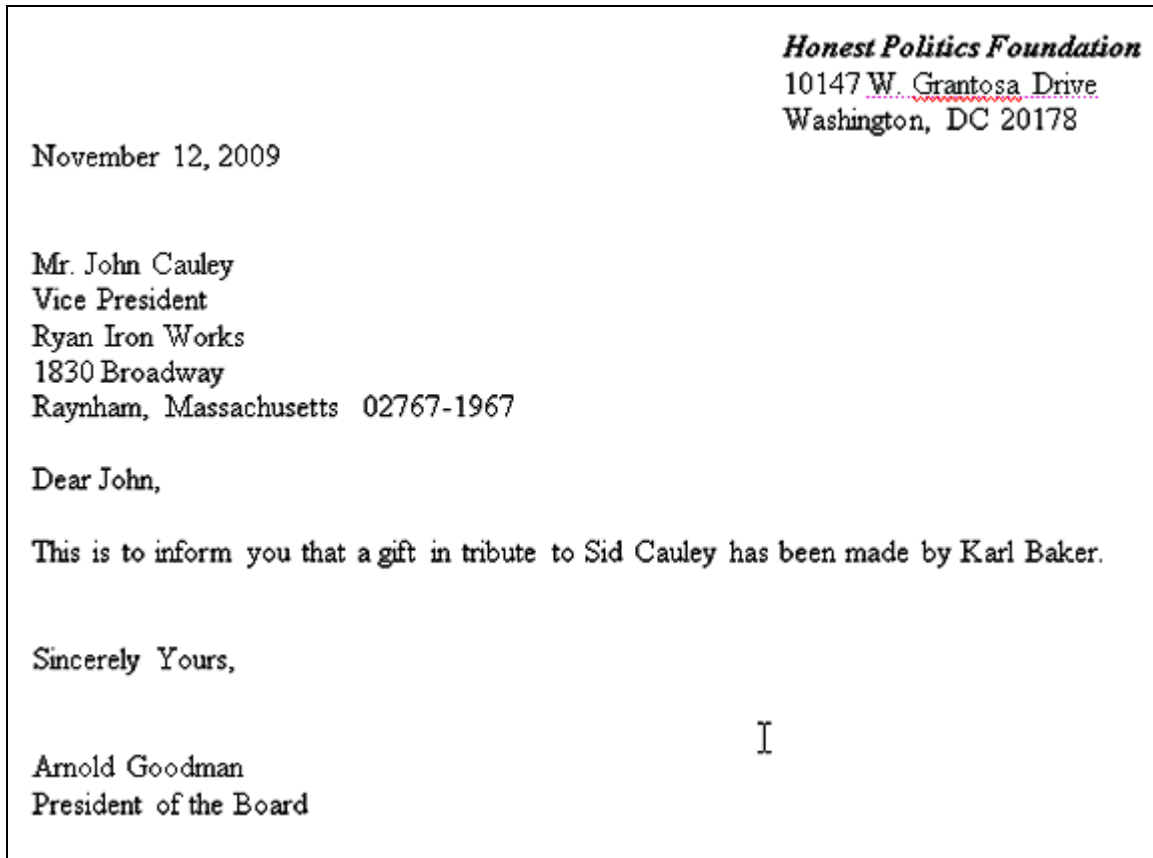


Figure 8. Sample Notification Letter After Merge

Establishing a Notification When Applying a Gift to a Tribute

A tribute is a record that is used to track memorial or honorarium gifts related to a particular constituent. Instead of having to enter the memorial or honorarium information every time a new gift is received, as was discussed above, you can create one tribute record and then apply as many gifts to that tribute as you want. DonorPerfect Online gives you the opportunity to create and send notification letters to donors whose gifts are applied to tributes.

Note that you cannot apply a pledge to a tribute.

► **To establish a notification within a tribute**

1. Create a new Tribute to honor or memorialize somebody as usual. For example, Figure 9 below illustrates a tribute that was created to honor Kevin Bacon's philanthropic work.

Kevin Bacon (69)

Main Gifts Pledges **Tributes** Contacts Bio Other Info

Attach a File

Tribute Details

Tribute ID: 1495

Tribute Type: In Honor Of

Description: Kevin's philanthropic work

Start Date: 11/2/2009

End Date:

General Ledger: Education

Thank-you #: Tribute Gift Thank-You

Main Contact: [Lookup Name](#)

Comments:

Send Mail:

Thank-you Letter Sent:

Figure 9. Kevin Bacon Tribute

2. Enter the new gift as usual under the donor's record and click the **Apply to a Tribute** link at the top of the gift tab to open the Apply to a Tribute screen.
3. Fill in the fields in the Apply to a Tribute screen with sufficient information to access the tribute of interest and click **Search**. The system will display a list of tributes that satisfy the search criteria as shown below in Figure 10.

Paul Farrington (174)

Main **Gifts** Pledges Tributes Contacts Bio Other Info Links

Apply to a Tribute

Search Tributes:

Type: In Honor Of

Description: Kevin's philanthropic work.

Last Name/Org/ID#:

First Name:

Tribute ID	Name	Amount	Description	Start Date
<input checked="" type="checkbox"/> 1495	Kevin Bacon (69)	\$100.00	Kevin's philanthropic work.	11/2/2009

Figure 10. Tribute Search Results

4. Select the tribute to which you want to apply the new gift and click **Apply to Tribute**. The system will respond with a message asking if you want to create a notification for this tribute gift.

Click **Yes**. The system will display the Linked Gifts screen as shown below in Figure 11.

Note that the fields in the Linked Gifts screen will have been automatically completed with the information from the Gift screen and the Tribute itself (Fig. 9), but you may modify them if necessary. Again, you will probably want to change the **Thank-You #** selection. (In our example, we have replaced “Tribute Gift Thank-You,” which was specified in the tribute, to “Tribute Gift Notification,” a letter that is more appropriate for the notification.) You should also fill in the **Memo** field with the name of the donor.

Figure 11. Linked Gift Screen

Note that you do not have to complete the **First Name** and **Last Name** fields because the owner of the tribute is, by definition, the person being honored or memorialized.

5. Click **Create Notification**. The system will return you to the Linked Gifts screen where the newly linked gift will be listed.

Once the notification type gift record has been created for the new tribute gift, when Receipts and Acknowledgments Processing is next executed, the information required for the notification letter will be included in the appropriate mail merge data file, as explained above.

Refer to the “Tribute Entry” section of the *DonorPerfect Online User Manual* for information on the creation and management of tributes and to the “Applying a Gift to a Tribute” section for more detail on, specifically, generating notifications for tribute gifts.