Instructions for DonorPerfect Online End of Year Mail Merge with Gift List

This document details how to use the **End of Year Tax Merge Letter** mail merge template document to generate donor letters that list the amount, check number and type of gift for each donation made by the donor within the previous year.

The steps to do this are as follows:

1. Set up the Gift List.

2. Download the mail merge template document.

3. Edit and personalize the mail merge template document.

4. Generate the mail merge file.

5. Run the mail merge.

Setting Up the Gift List

Before generating a mail merge file, you should first set up the Gift List.

The Gift List field is provided as a way to include transaction data in a mail merge file. When a mail merge is run, the Gift List field will be populated with entries for all of the selected gifts.

```
11/30/2007        $5,000.00       Scholarship       5000
11/30/2007        $800.00         Unrestricted      0
11/30/2007        $200.00         Education         0
11/30/2007        $200.00         Unrestricted      0
11/30/2007        $100.00         Building Fund     0
11/30/2007        $100.00         Disaster Relief   0
12/3/2007         $1,000.00       Scholarship       0
```

The current Selection Filter will determine which gifts appear in the Gift List field. For instance, if the Selection Filter specifies a date range for Gift Dates, only gifts that fit within that range will appear in the Gift List field. If no selection filter is used, all of the donors' gifts that are in the system will appear in the Gift List field.

The Gift List can be set up in one of two ways:

- **Consolidated Field:** The gift list is output as a single field that contains all of the gift list entries formatted as a set of fixed columns, with spaces inserted to pad each column out to a specified minimum length. You must format the gift list and its headings with a monospaced font such as Courier New or Lucida Console if you select this option.

- **Individual Fields:** The gift list is output as up to five separate fields, each of which contains all of the entries of one of the columns in the gift list table. This provides more flexibility in formatting the gift list table, and allows you to use a broader variety of fonts.

The Gift List is set up on the Mailings Parameters screen. To access the screen, on the navigation bar, click **Settings**, then **Parameters**. On the Parameters page, click the **Mailings: Mailmerge, E-Mail** link.

To set up the Gift List, select Consolidated or Individual fields, then select up to five fields that can appear in the list, and click the **Save** button to save your changes.

> **Note:** If you change the fields that are selected to appear in the Gift List, you will need to change the column headings in your merge document to match the new fields.

Selecting Consolidated or Individual Fields

To specify which method of output is used, set **Export Gift List Value as** to either **Consolidated Field** or **Individual Fields**.

Specifying the Gift List Fields

To specify the gift list fields, fill in the following information for each field:

Field	Definition
Field Name	Select the field that you want to appear in the Gift List.
Position	Indicates the order of the fields. 1 is the leftmost field.
Length	The minimum length of the field. If the data takes up fewer characters than this, spaces will be inserted to pad out the field to this length. If the data is longer than this number of characters, it will NOT be truncated, but instead will continue to its full length, at which point the next field will start. This can mess up column alignment, so beware.
Display Description	This setting determines if coded fields will be listed using the descriptions for the codes, or the actual codes contained in the fields. Select **No** to display the code, or **Yes** to display the description that corresponds to this code instead.

For instance, to display the date, amount, General Ledger code, and Check #/Reference, you would set up the fields like this:

Gift List Template

Export Gift List Value As: ⦿ Consolidated Field   ◯ Individual Fields

Field Name		Position	Length	Display Description
GIFT_DATE	▾	1	20	No ▾
AMOUNT	▾	2	20	No ▾
GL_CODE	▾	3	20	No ▾
REFERENCE	▾	4	20	No ▾
	▾		20	No ▾

[Save]

If **Individual Fields** are selected, the name of each of the individual gift fields is listed to the right of the other settings:

Gift List Template

Export Gift List Value As: ◯ Consolidated Field   ⦿ Individual Fields

Field Name		Position	Length	Display Description	
GIFT_DATE	▾	1	20	No ▾	Export File Column Name "GiftList1"
AMOUNT	▾	2	20	No ▾	Export File Column Name "GiftList2"
GL_CODE	▾	3	20	No ▾	Export File Column Name "GiftList3"
SOLICIT_CODE	▾	4	20	No ▾	Export File Column Name "GiftList4"
REFERENCE	▾	5	20	No ▾	Export File Column Name "GiftList5"

> **Note:** When using the Consolidated Field option, it is best to put the information that tends to vary in length in the rightmost position, so that its fluctuation will not interfere with the alignment of the other columns.

Downloading the Mail Merge Template Document

► To download the mail merge template document

1. Log into DonorPerfect Online.

2. From the navigation bar, click on **Mailings**, then **Mailmerge Templates**.

3. On the Mailmerge Templates screen, in the **Microsoft Word Sample Letter Formats** section, download one of the following files:

   - If you are using the Consolidated Field option, download the template marked **End of Year Tax Merge Letter (Single Gift List Field)**.

   - If you are using the Individual Fields option, download the template marked **End of Year Tax Merge Letter (Multiple Gift List Fields)**.

Personalizing the Mail Merge Template Document

The body of the mail merge template document contains placeholder paragraphs made up of "lorem ipsum" text. You will need to replace these with your own text before performing the mail merge.

> **Note:** If you are using the Consolidated Field option, the **Gift List** field and the column headings above it must be formatted with a monospaced font such as Courier New or Lucida Console in order to output correctly.

Generating a Mail Merge File for Use with the Mail Merge Template Document

In order to do a proper mail merge with the End of Year Tax Merge Letter, you need to generate a mail merge file that lists all gifts donated in the previous year by each donor.

▶ To generate a mail merge file for use with the mail merge template document

1. Log into DonorPerfect Online.

2. From the navigation bar, click on **Mailings**, then **Mail Merge**.

3. Set the Selection Filter to choose gifts that were given in the previous calendar year:

   a. Check **Set Selection Filter**.

   b. Click the **Build New Filter** button.

   c. Set the topmost **Select screen/table to choose fields from** list to **Gift/Pledge**.

   d. Set **2. Select field to compare** to **GIFT_DATE (Gift Date)**.

   e. Set **3. Select comparison operator** to **between**.

   f. Set the two fields under **4. Type in value to lookup** to the first and last day of the previous year (ex: **1/1/2008** and **12/31/2008**)

   g. Click the **Done** button.

   h. On the Verify Filter Criteria screen, check **Exclude Pledges and Linked Gifts**.

   i. Click the **Done** button on the Verify Filter Criteria screen to complete the filter and return to the Mailmerge screen.

4. If you want to send the end of year letter out to all donors regardless of whether you have selected "No Mail" or not, check the **Include "No Mail" Addresses** checkbox.

5. Check the **Export to Excel (CSV)** checkbox.

6. Check the **Include Gift List in Mailmerge** checkbox.

7. Click the **Do** button.

8. Save the mail merge data file to your computer

Running the Mail Merge

There are no special steps that need to be taken when running the mail merge. Use the personalized mail merge template document as your starting document. Select the mail merge data file as your data source.