

CRM: How to Thank Donors

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Watch this video to thank your donors with emails, physical mail, and more through the GiveSmart Donor CRM system.

NOTE: To send a Gift or Pledge Thank You, select **Communications** from the left navigation, as these features have moved to a new home. Video will be updated soon to reflect the new navigation.

Merge Field Options

There are multiple merge field options to choose from when creating a Gift or Pledge thank you.

Gift Thank You

- System Fields
 - Organization/Client Name
 - Long Today's Date
 - Mid Today's Date
 - Short Today's Date
 - User's Name
- Contact Fields
 - Address Block
 - Title
 - First Name
 - Last Name
 - Suffix
 - Salutation
 - Address 1
 - Address 2
 - Address 3
 - Address 4
 - City
 - State
 - Zip
 - Donor ID
- Gift Transaction Fields
 - Amount
 - Gift Date
 - General Ledger
 - Solicitation Method
 - Campaign
 - Solicitor
 - Sub Solicitation

- Notes
- Asset Amount
- Asset Date
- TDA (Tax Deductible Amount)
- FMV (Fair Market Value)
- Tribute Type
- Tribute Name
- Custom Contact Fields
- Custom Gift Fields

Pledge Thank You

- System Fields
 - Organization/Client Name
 - Long Today's Date
 - Mid Today's Date
 - Short Today's Date
 - User's Name
- Contact Fields
 - Address Block
 - Title
 - First Name
 - Last Name
 - Suffix
 - Salutation
 - Address 1
 - Address 2
 - Address 3
 - Address 4
 - City
 - State
 - Zip
 - Donor ID
- Pledge Fields
 - Start Date
 - End Date
 - Pledge Type
 - Total Amount
 - Billing Amount
 - Schedule
 - Next Payment Due Amt
 - Next Payment Date
 - Pledge Balance
 - Pledge ID
- Custom Contact Fields
- Custom Gift Fields