

Create U.S. Style Annual Donation Summary Letters

<i>Speech</i>	<i>Cursor Actions</i>
This video explains how to create U.S. Style Annual Donation Summary letters to send to your donors.	
Creating U.S. Style Annual Donation Summary letters is done by running a mail merge, using a template that generates the Annual Donation Summary letter.	
We recommend starting with the pre-built template on our website titled “U.S. Style Annual Donation Summary,”	Show website. Highlight this template
however, you can create your own template if you prefer.	
What is unique about the template for the Annual Donation Summary is a List formula.	Show template.
Formulas tell Sumac what information from the database it should insert in the resulting merged document.	
This List formula tells Sumac to insert a list of all the selected donations in the Annual Summary letter for each donor.	Highlight list formula
Don't forget! If you choose to make your own template for this Annual Summary letter, be sure to include this List formula.	
To begin creating these Annual Donation Summary letters, open your donations list.	Show Console. Open Donations list
To find all the donations made in this calendar year, choose a Start Date of January 1, and an End Date of December 31,	Choose Start Date: 2013-01-01 and End Date: 2013-12-31
Then click Search	Click Search
Sumac shows all the donations made during this year.	Point to list
You may find it helpful to sort this list alphabetically by the donors' names.	Sort by Donor Name
Now that we've found all the donations from this year, expand the Mailing menu and click Mail Merge. Sumac lets you know that it will process all the donations in this mail merge. Click OK to confirm.	Expand Mailing. Click Mail Merge Click OK
Sumac asks how you would like to group the donation records in this mail merge. For this Annual Donation Summary letter, you should choose to group the donations by the donor, so that Sumac knows to produce one letter for each donor, listing all the donations they made in the year. Then Click OK.	Choose: Group donations by donor Click OK
Sumac asks you to choose a template for this letter. Select your U.S. Style Annual Donation Summary template. Then click OK.	Select template Click OK
Sumac asks you where you would like to save these letters.	
If you are going to print these letters and send them out via direct mail, choose to merge the results to a single output file, so you can easily print them later.	Point to Merge results to single output file

If you are going to be emailing these letters, choose to create multiple output files, one for each donor, so that you can email them individually later on.	Point to Create multiple output files
If you choose to email these Annual Summary letters, move on to the Email Receipts video available on our website.	
For this example, let's assume that we will be sending these letters by paper mail, so I'll choose to make a single output file.	Click Merge results to single output file.
Next, choose where Sumac should save this document.	Click Choose File. Save to Desktop
Click OK, and Sumac asks you to confirm that it is going to save this document to a single output file.	Show message.
Click OK, and Sumac performs the mail merge.	Click OK.
Sumac also asks if you'd like to save a communication record for the donors included in this mail merge. Usually it is a good idea to do this so that you can record that you sent their Annual Summary letters.	Click Yes. Save Communication record using Comm. Type "Annual Donation Summary"
Now that we've created the Annual Summary letters and saved communication records for all the donors, we can print the letters.	
Open the file that contains the Annual Summary letters.	Open File
Notice that Sumac has personalized all these letters and listed the appropriate donations for each donor.	Show some merged info
After printing these letters, you can create labels or envelopes for these recipients and send out your mailing!	Point to the Labels/Envelopes command in the Donations list window
<i>Check out more training videos to learn more about Sumac.</i>	