

Email Receipting Guide

DonorPerfect Online

SofterWare, Inc.
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Introduction

Email Receipting allows you to send receipts and acknowledgments to your donors via email. This can be done instead of regular letter-style receipts generated through mail merges, or in combination with letter receipts.



Note: Consolidated receipting users please refer to the *DonorPerfect Online User Manual* or the online help for instructions on using email receipting with consolidated receipting.

Choosing Email and/or Letter Receipting

You can select receipting options at the system, donor and gift levels.

In the **Acknowledgments/Receipts** parameters screen, the **Default Donor Receipt Delivery Method** parameter sets whether receipts & acknowledgments will be sent via mail, letter, email AND letter, or not at all. This is the default setting for your entire DonorPerfect Online system.

For each donor in the system, you can choose whether you want to send their receipts/acknowledgments via email, or letter, both, or not at all. This option can be set in the Main Entry Screen once email receipting is activated. The donor level setting overrides the system level setting.

Lastly, you can also select email receipting, letter receipting, both, or none when you enter a gift. The gift level setting overrides the system and donor level settings.

Workflow

The basic workflow for email receipting is as follows:

1. Set up receipting and activate email receipting.
2. Set up email templates for your receipts and acknowledgments.
3. Set receipting preferences for donors.
4. Select receipting preferences when entering gifts.
5. Preview your acknowledgments and receipts, if desired.
6. Generate email receipts and acknowledgments.
7. Generate mail merge data files for letter receipts and acknowledgments.
8. Update the batch number.

Regenerating Official Receipts

If need be, you can regenerate an official email receipt like you would do for an official letter receipt.

Email Receipting

Setting Up Email Receipting

Before you can start entering gifts and generating receipts, you must first activate receipting and select the system default setting for receipt delivery method.

- ▶ **To activate receipting and set the default delivery method**
 1. From the navigation bar, select **Settings** and then select **Parameters**.
 2. Click the **Entry Screens** link:
 - a. On the Entry Screen Parameters screen, check **Show RECEIPT fields**.
 - b. Click the **Save** button to save changes and return to the Parameters screen.
 3. Click the **General Parameters** link:
 - a. On the General Parameters screen, check **Activate Receipting**.
 - b. Click the **Save** button to save changes and return to the Parameters screen.
 4. To activate email receipting, click the **Acknowledgements/Receipts, Financial Reports** link:
 - a. On the Financial Reports/Receipt Processing screen, check **Enable Email Receipt Delivery Method**.
 - b. Set **Default Donor Receipt Delivery Method** to the receipt delivery method that you want to be selected by default for new donors:

Do not acknowledge	This donor will not receive receipts and acknowledgments.
Email	This donor will receive receipts and acknowledgments as email messages.
Email and Letter	This donor will receive receipts and acknowledgments as both email messages and printed letters.
Letter	This donor will receive receipts and acknowledgments as printed letters.

- c. Click the **Save** button to save changes and return to the Parameters screen.
5. Log out of DonorPerfect Online and log back in.

Setting Up Email Templates

Email templates allow you to store all of the standard text and settings for your commonly-used email messages. When sending email, you can select a template, and the text and information entered into the template will automatically be entered into your new email message. This saves lots of time, and helps to ensure that the emails contain all the necessary information.

Email templates are created and maintained in the Email Templates screen, which is found in the **Mailings** menu of the navigation bar.

	Template Name	Associated TY Letters	Modified By	Modified Date	Created By	Created Date	
Edit	Alex Test 2		imem8	02/08/2010	emailtrnplt	06/29/2009	
Edit	BatchTY		imemalex	01/22/2010	emailtemplate	09/11/2009	
Edit	Copy of Copy of Standard Acknowledgment with Split Gift SV		imem6	01/21/2010	imem6	01/06/2010	
Edit	Copy of Standard Acknowledgment with Split Gift SV		imem6	01/06/2010	imem6	01/04/2010	
Edit	Monika100		imem3	02/08/2010	imem3	02/08/2010	
Edit	Not Shared With All Users		imem6	11/30/2009	imem6	11/30/2009	
Edit	Personal E-mail Acknowledgment		imem4	12/10/2009	imem4	12/10/2009	
Edit	Sean Test		imem6	01/26/2010	emailtrnplt	06/29/2009	
Edit	Sean's Template	Product Order	imem2	01/26/2010	imem6	12/29/2009	
Edit	Standard Acknowledgment E-Mail	Email Receipt	imem4	02/01/2010	emailtrnplt	06/29/2009	
Edit	Standard Acknowledgment E-Mail 2		imem4	01/21/2010	emailtrnplt	08/10/2009	
Edit	Standard Acknowledgment with Split Gift	Sports Package	imem4	12/29/2009	imem4	12/29/2009	
Edit	Standard Template	Pledge, Pledge Thank You	imem1	12/30/2009	imem1	12/30/2009	
Edit	Test Letter	Membership Letter	imem3	02/08/2010	imem1	11/05/2009	

Creating a New Email Template

You can either create a new template from scratch, or make a copy of an existing template (see Copying an Email Template, page 11).

► To create a new email template from scratch

1. From the navigation bar, select **Mailings** then select **Email Templates**.
2. At the top of the Email Templates screen, click on the **Create New Email Template** button. A new screen appears:

The screenshot shows the DonorPerfect Online interface. At the top, there is a navigation bar with icons for Home, Search, Receipts, Mailings, Reports, Tasks, Utilities, Settings, Web Apps, and Help?. The user is logged in as 'uitestthree'. Below the navigation bar, there are buttons for 'Back', 'Save', and 'Save and Close'. The main content area is titled 'Template Details' and contains the following fields:

- Name:** Standard Acknowledgment Email
- Share with all users:** Share with all users
- TY Letter:** Standard Acknowledgement (selected from a dropdown menu). A link 'Click to Edit TY Codes' is visible.
- CC:** (empty text field)
- BCC:** (empty text field)
- From:** jacheson@softerware.com
- Subject:** Thank you for your generous donation!
- E-Mail Message Format:** Rich HTML Plain Text

3. The **Template Details** section contains fields for the information that will appear in the message headers of the email message:

Name	A short descriptive name for the template, like "Standard Acknowledgement Email."
Share with all users	If this option is checked, other DonorPerfect Online users will be able to see and use this template. If the option is not checked, only you will be able to see and use it.
TY Letter	Enter the Thank You Letter code that this email corresponds to. Each Thank You Letter Code can correspond to one and only one email template. To select the code from the list of available TY Codes, click the Click to Edit TY Codes link (see "Selecting the TY Code for an Email Template," page 8 for details).
CC	Enter email addresses that you want to receive a copy of this email message when it is sent.
BCC	Enter email addresses that you want to receive a blind carbon copy of this email message when it is sent.
From	Enter the email address that you want to appear in the From field of the email.
Subject	Enter the subject line that you want to appear in the email.

4. The **Message Body** section is where you can enter the text that will appear in the body of the email message. At the bottom of the screen, you can select whether to format the body of the message as **Rich HTML**, which allows you to format the text in a variety of ways using the toolbar at the top of the text field, or as **Plain Text**, which has no formatting.
5. If desired, you can also embed DonorPerfect Online fields in your email message. Embedded fields have an appearance like **%%BIO.AVAILABILITY_DAY%%**. When the email is sent, the embedded field will be replaced with the contents of that field in the current record. See “Embedding Fields in Email Templates” on page 8 for details.

6. The **Official Receipt** and **PDF Attachment** sections are used for email receipting. When email receipting is activated, two emails will be sent to each donor: the standard email, and a second email consisting of the following:
 - The headings will be the same as for the first message, except that “Official Receipt” will be appended to the **Subject** line.
 - The text in the **Official Receipt** tab of the Email Template will form the body of the message.

- The text in the **PDF Attachment** tab of the Email Template will be turned into a PDF and attached to the second email message.
7. To exit the screen, do one of the following:
 - To exit the screen without saving the new template, click the **View Templates** button at the top of the screen.
 - To save the current template without exiting the editing screen, click the **Save** button at the top of the screen.
 - To save the current template and return to the Email Templates screen, click the **Save and Close** button at the top of the screen.

Selecting the TY Code for an Email Template

Each Thank You Letter code (TY code) in the system can be linked to one and only one email template. This aids in processing email thank you letters, as the corresponding email template can be automatically selected based on the TY Code entered for a gift.

The **Click to Edit TY Codes** link next to the TY Letter field in the Email Template editing screen allows you to select the TY Code that will be linked to the current email template.

► To select the TY Code for an email template

1. In the Email Template editing screen, click the **Click to Edit TY Codes** link next to the TY Letter field. The **Choose available Thank You letter(s) to be associated with the template** screen appears.

Select	Code	Letter Description	Template Name
<input type="checkbox"/>	02	Board Member	
<input type="checkbox"/>	03	Pledge	
<input type="checkbox"/>	04	Pledge Payment	
<input type="checkbox"/>	05	Notificant Letter	
<input type="checkbox"/>	06	Pledge Thank You	
<input type="checkbox"/>	08	No TY Letter	
<input type="checkbox"/>	09	Capital	
<input type="checkbox"/>	10	Membership Letter	
<input type="checkbox"/>	11	Memorial Letter	
<input type="checkbox"/>	12	Product Order	
<input type="checkbox"/>	13	Premium	
<input type="checkbox"/>	20	Tee Sponsor Sign	
<input type="checkbox"/>	22	Building Fund Thank You	
<input type="checkbox"/>	23	Building Fund Thank You	

Apply Cancel

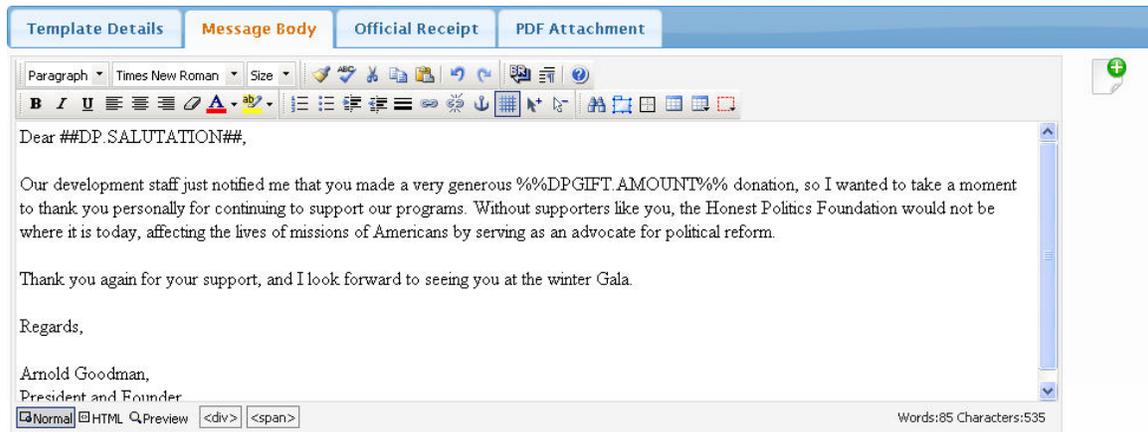
2. Check the box next to the TY Code you want to associate with this template.
3. Click the **Apply** button. The screen closes, and you are returned to the Email Template editing screen. The selected code will be listed in the **TY Letter** field.

Embedding Fields in Email Templates

You can pull data out of your DonorPerfect Online records and include it in your email messages by embedding one or more fields in the message. When the email is sent, the embedded field will be replaced with the contents of that field in the current record.

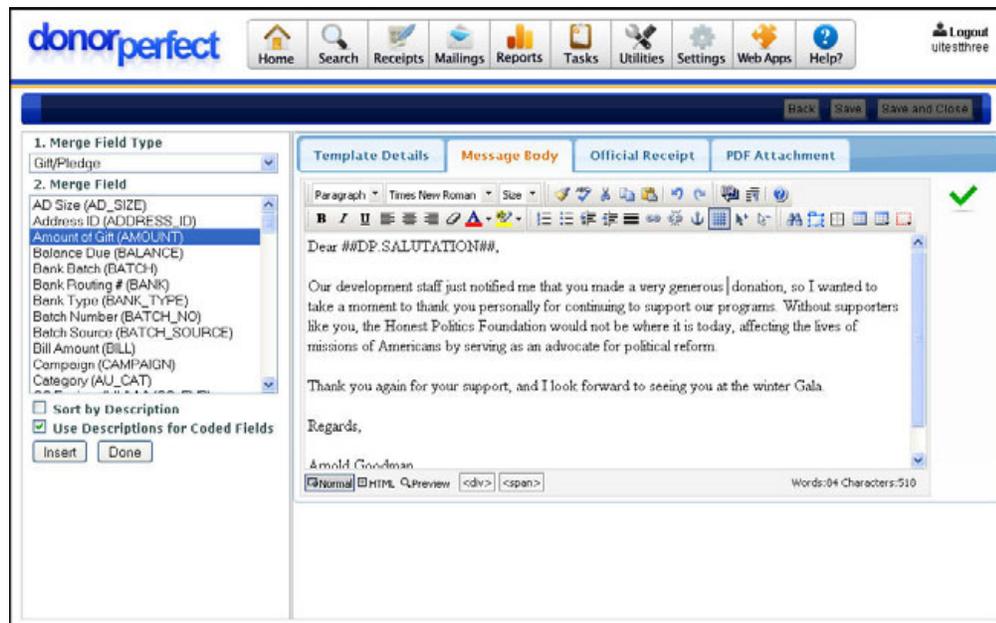
Embedded fields have an appearance like `%%BIO.AVAILABILITY_DAY%%`.

The following example shows the body of an email template. The **DP.SALUTATION** field has been embedded into the text so that the name of the email recipient will appear in the first line of the text. The gift amount will also appear automatically in the body of the message, where the **DPGIFT.AMOUNT** field has been embedded.



► To embed a field in an Email template

1. Click the **Insert Merge Field** button that appears to the right of the editable fields. The controls at the top of the screen will be grayed out, and a new set of fields will appear on the left side of the screen:



2. Place your cursor where you want the embedded field to appear in your email.

3. Set **Merge Field Type** to one of the following:
 - **All** – You can enter fields from either the Main/Bio tables, or the Gift/Pledge tables. This is the default setting.
 - **Main/Bio** – You can enter fields from the Main/Bio table only. These are typically fields from the main entry screen or the Bio screen.
 - **Gift/Pledge** – You can enter fields from the Gift/Pledge tables only. These are fields from gift or pledge records.
 - **Functions** – These selections enter a combination of fields and text to provide a fast and easy way to create common message elements such as an address block, or a salutation.
4. If you selected **All**, **Main/Bio**, or **Gift/Pledge** from the **Merge Field Type** list, carry out the following steps to embed your field:
 - a. Select the field you want to enter from the **Merge Field** list. Click the **Sort By Description** option to sort the fields in the list by their descriptive text, instead of by their field name.
 - b. Check **Use Descriptions for Coded Fields** to display the descriptions for the codes in a coded field, instead of the actual codes contained in the fields. For instance, if you are embedding the solicitation code, the name of the solicitation would be displayed instead of the code.
 - c. Click the **Insert** button to insert the selected field into your text.
5. If you selected **Functions** from the **Merge Field Type** list, carry out the following steps to embed your fields and text:
 - a. Select one of the following functions:

Function	Description	Example															
Address Block	Enters the full set of fields to display the mailing address of the email recipient.	<pre>##DP.TITLE## ##DP.FIRST_NAME## ##DP.LAST_NAME## ##DP.ADDRESS## ##DP.ADDRESS2## ##DP.ADDRESS3## ##DP.ADDRESS4## ##DP.CITY## ##DP.STATE## ##DP.ZIP##</pre>															
Salutation	Enters the Dear [recipient] line for the beginning of a message.	<pre>Dear ##DP.SALUTATION##,</pre>															
Split Gift Details	Enters a table containing the split gift fields for the current gift record.	<pre>^^ <table border="1"> <thead> <tr> <th>Prompt1</th> <th>Prompt2</th> <th>Prompt3</th> <th>Prompt4</th> <th>Prompt5</th> </tr> </thead> <tbody> <tr> <td>Split_Gift1_F1</td> <td>Split_Gift1_F2</td> <td>Split_Gift1_F3</td> <td>Split_Gift1_F4</td> <td>Split_Gift1_F5</td> </tr> <tr> <td>Split_Gift2_F1</td> <td>Split_Gift2_F2</td> <td>Split_Gift2_F3</td> <td>Split_Gift2_F4</td> <td>Split_Gift2_F5</td> </tr> </tbody> </table> ^^</pre>	Prompt1	Prompt2	Prompt3	Prompt4	Prompt5	Split_Gift1_F1	Split_Gift1_F2	Split_Gift1_F3	Split_Gift1_F4	Split_Gift1_F5	Split_Gift2_F1	Split_Gift2_F2	Split_Gift2_F3	Split_Gift2_F4	Split_Gift2_F5
Prompt1	Prompt2	Prompt3	Prompt4	Prompt5													
Split_Gift1_F1	Split_Gift1_F2	Split_Gift1_F3	Split_Gift1_F4	Split_Gift1_F5													
Split_Gift2_F1	Split_Gift2_F2	Split_Gift2_F3	Split_Gift2_F4	Split_Gift2_F5													

Today's Date	Enters today's date.	@@TodaysDate@@
Tribute Details	Enters the description and main contact fields for the current tribute record.	##DPGIFT.TRIBUTE_DESCRIPTION## ##DPGIFT.TRIBUTE_MAIN_CONTACT##

- b. Click the **Insert** button to insert the fields and text from the selected function into your text.
- 6. To insert additional fields, repeat steps 2-5.
- 7. To finish inserting fields and return to the email template, click the **Done** button.

Editing an Email Template

► To edit an email template

- 1. From the navigation bar, select **Mailings** then select **Email Templates**.
- 2. Click the **Edit** link next to the email template that you want to edit. The template will open in the Email Editing screen. Editing a template works identically to creating a template (see “Creating a New Email Template” on page 5).

Copying an Email Template

► To make a copy of an existing Email template

- 1. From the navigation bar, select **Mailings** then select **Email Templates**.
- 2. Click the  button next to the email template that you want to copy. A confirmation screen will appear:



- 3. Click the **OK** button to copy the template. The copy of the template will be created, and will be named **Copy of [original name]**.
- 4. To rename the copy, edit it (see “Editing an Email Template,” above).

Deleting an Email Template

► To delete an Email template

- 1. From the navigation bar, select **Mailings** then select **Email Templates**.
- 2. Click the  button next to the email template that you want to delete. A confirmation screen will appear:



3. Click the **OK** button to delete the template.

Setting Receipting Preferences for Donors

You can set receipting preferences separately for each donor. The **Receipt Delivery** field on the Main Entry Screen allows you to select whether a donor will receive no receipts, email receipts, printed letter receipts, or both email and letter receipts.

This setting overrides the system default setting.

► To set receipting preferences for a donor

1. Open the donor record in the Main Entry Screen.
2. Set **Receipt Delivery** to one of the following settings:

Do Not Acknowledge	This donor will not receive receipts and acknowledgments.
Email	This donor will receive receipts and acknowledgments as email messages.
Email and Letter	This donor will receive receipts and acknowledgments as both email messages and printed letters.
Letter	This donor will receive receipts and acknowledgments as printed letters.

3. Click the **Save** button to save your changes.

Setting Receipting Preferences when Entering Gifts

You can select what kind of receipt will be sent for each gift you enter into the system. The **Receipt Delivery** field on the Gift Entry Screen allows you to select whether a gift will generate no receipts, email receipts, printed letter receipts, or both email and letter receipts.

This setting overrides the system default and donor level settings.

► To set receipting preferences for a gift

1. Enter the gift as you normally would. See "Gift Entry" in the *DonorPerfect Online User Manual* for details.
2. Set **Receipt Delivery** to one of the following settings:

Do Not Acknowledge	Receipts and acknowledgments will not be generated for this gift.
---------------------------	---

Email	Receipts and acknowledgments for this gift will be sent as email messages.
Email and Letter	Receipts and acknowledgments for this gift will be sent both as email messages and printed letters.
Letter	Receipts and acknowledgments for this gift will be sent as printed letters.

3. Click the **Save** button to save your changes.

Previewing Acknowledgments and Receipts

To preview the transactions for which acknowledgments and receipts will be generated, run the Transaction Listing report from the Receipts screen, with the following option selected:

- Make sure the **Include Already Processed Gifts (Previously Received Or Acknowledged)** option is NOT checked.

See “Running the Receipts and Acknowledgements Reports” on page 22 for details on running the Transaction Listing report.

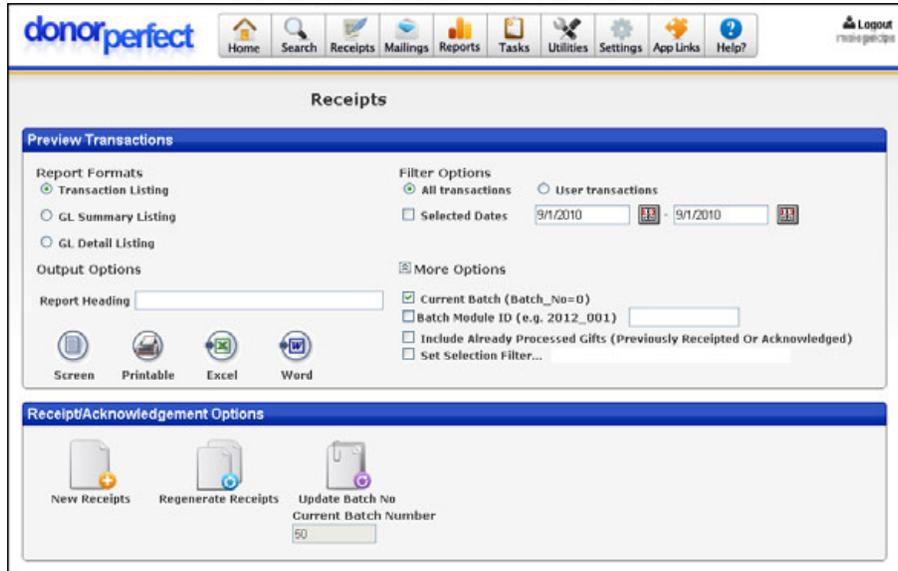
Generating Receipts and Acknowledgments

When the Receipts screen generates email acknowledgements and receipts, it follows the following steps:

1. The user sets receipting options and starts off the process.
2. If there are unprocessed gifts that were set to receive email receipts, the Email Receipts screen appears, allowing you to select and output the email messages.
3. After the email receipts have been sent, you will see an Email Results screen that displays the results from the email receipting operations.
4. If there are unprocessed gifts that were set to receive letters, the Letter Receipts screen appears, allowing you to produce one or more mail merge data files that can be used to send the letters.

► To generate acknowledgements and receipts

1. From the navigation bar, click on the **Receipts** button. The Receipts screen appears:



2. Set the following receipting options:

Selected Dates	If checked, the system will select only those transactions that fall within the starting and ending dates you specify, regardless of the batch number.
-----------------------	--

3. If you click the **More Options** link, you can select the following additional options:

Current Batch	If checked, the system will only select gifts whose Batch Number is set to 0. This is generally only true for gifts that were added to the system after the last batch was processed.
Batch Module ID	If a batch number from the Batch 1.0 or Batch 2.0 modules is entered in this field, receipts will only be generated for the gifts from that batch.
Include Already Processed Gifts	This option includes gifts that have already been assigned to a batch or assigned a receipt number from the acknowledgement processing. It is cleared by default.
Set Selection Filter	Check to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" in the <i>DonorPerfect Online User Manual</i> for details.

4. From the **Receipt/Acknowledgment Options** section at the bottom of the screen, click the **New Receipts** button:



5. If you have gifts in the system whose **Receipt Delivery** settings specify an email receipt, the Email Receipts screen appears. This screen allows you to select the email templates that will be used to send the receipts, and then tell the system to generate the email acknowledgements and receipts. See “Sending Email Receipts” on page 15 for details.
6. Once you generate email receipts, the Email Results screen displays the results and allows you to export records to Excel. See “Viewing Email Results” on page 18 for details.
7. If you have gifts in the system whose **Receipt Delivery** settings specify a letter receipt, the Letter Receipts screen appears. This screen allows you to generate the mail merge data files that will be used to generate the receipt letters. See “Generating Mail Merge Data Files for Letter Receipts” on page 19 for details.
8. Once you have generated mail merge data files for letter receipts, you can click the **Done** button to return to the Receipts page.



Important! If you are processing email receipts for gifts that have been marked for **Email and Letter** receipts, the gifts will not be assigned receipt numbers until after the mail merge data files have been generated from the Letter Receipts page at the end of the process. In other words, you must do both the email and the letter receipting in full to complete the process correctly.

Sending Email Receipts

If you are generating receipts for gifts with **Receipt Delivery** settings that specify an email receipt, the Email Receipts screen appears. This screen allows you to select the email templates that will be used to send the receipts, and then generate email receipts.

donorperfect Home Search Receipts Mailings Reports Tasks Utilities Settings Web Apps Help? Logout uiltesthree

E-Mail Receipts (4) > E-Mail Results > Letter Receipts (4)

Pending E-Mail Receipts Back Generate E-Mail Receipts [Add New Template](#)

Select	TY #	TY Description	Records	E-Mail Template
<input checked="" type="checkbox"/>	01	Standard Acknowledgement	2 Edit	Standard Acknowledgment Email Preview
<input checked="" type="checkbox"/>	07	Special Event	1 Edit	Special Event Preview
<input checked="" type="checkbox"/>	103	Auction Donation Thank You	1 Edit	Auction Donation Thank You Preview
Total:			4	

Options:

- Include official receipt (PDF)
- Primary E-Mail address only
- Use secondary E-Mail address set to receive the following mailing type(s):
Note: Primary E-Mail address will be used if no mailing type match exists.
 - ALTEM
 - Annual Report
 - Board Mailings
 - Sample Newsletter

Back Generate E-Mail Receipts

The receipts to be sent are grouped by the thank-you letter code (**TY #**) that was entered in the gift records. There is also a category for gifts that did not have a **TY #** specified. You can choose whether to generate email receipts for each **TY #** category or not.

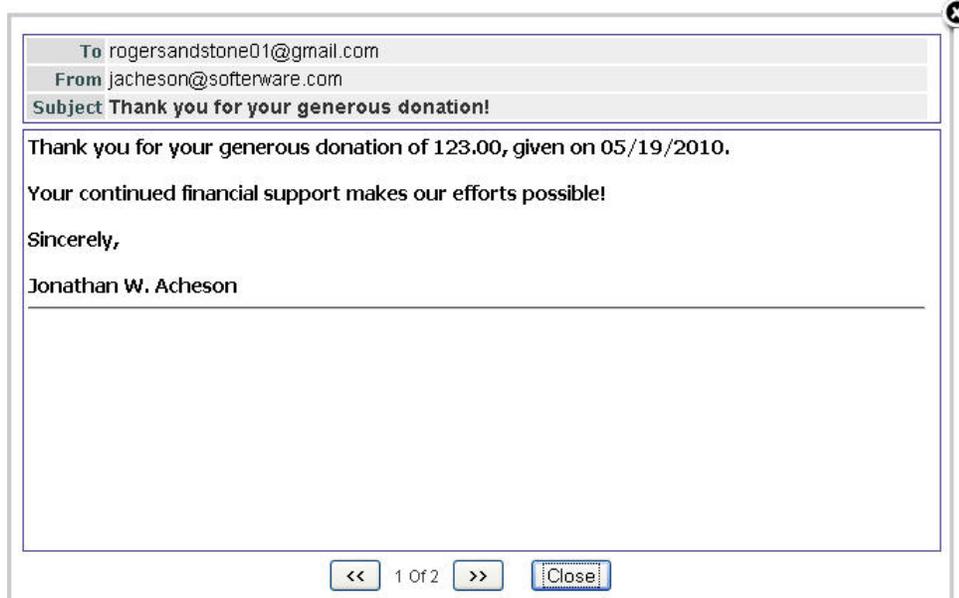
► **To generate email receipts**

1. Select the types of **TY #** that you want to generate email receipts for by checking the box in the **Select** column.
2. Select the Email Template that you want to use with each **TY #**. If an email template specifies the **TY #** in its **TY Letter** field, it will be selected by default (see “Creating a New Email Template” on page 5 for details).



Tip: You can click the **Add New Template** link to create a new email template to use with a given thank you number. This will take you to the Email Templates screen, where you can create the new template. Once you have selected an email template for a category, you can also click the **Edit** link in the **Email Template** column for a category, and edit the selected template. Adding or editing a template will end the current receipt generation cycle. Once you have created or edited the new email templates, you will need to start over again at the Receipts screen.

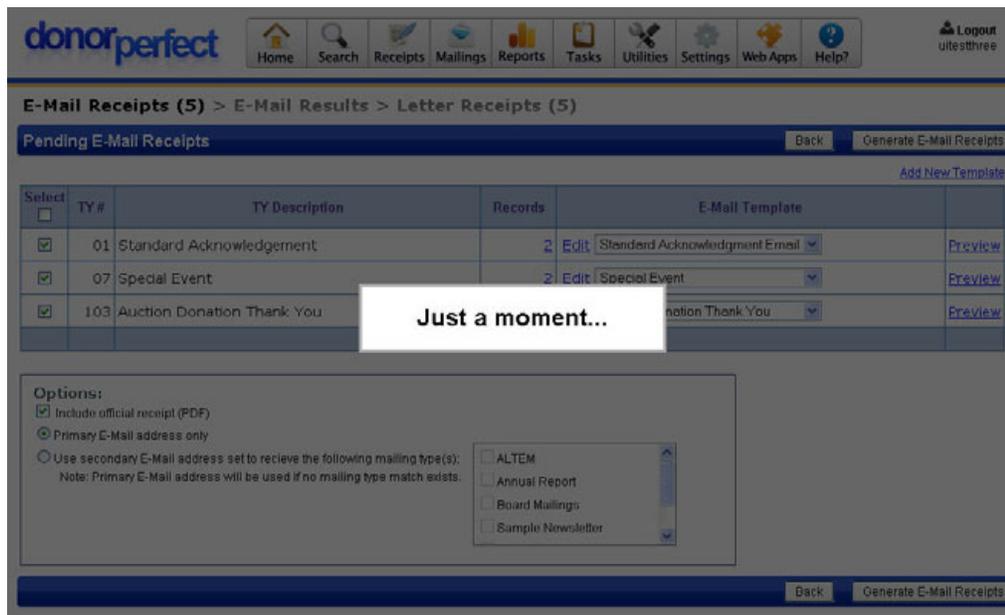
3. If desired, you can click on the **Preview** link for each **TY #** and see a preview of what the emails that will be sent out will look like:



4. Set the following options for email receipts:

<p>Include official receipt (PDF)</p>	<p>If this option is checked, a second email will be sent out along with the first. This message will consist of the following:</p> <ul style="list-style-type: none"> • The headings will be the same as for the first message, except that "Official Receipt" will be appended to the Subject line. • The text in the Official Receipt tab of the Email Template will form the body of the message. • The text in the PDF Attachment tab of the Email Template will be turned into a PDF and attached to the second email message. <div data-bbox="659 569 1385 802" style="border: 1px solid black; padding: 5px;">  <p>Note: If the Email Template you select does not have the Official Receipt and PDF Attachment tabs filled in, and this option is selected, you will get an error when you try to generate email receipts.</p> </div>
<p>Primary Email address only</p>	<p>If this option is selected, the primary email address for the donor will always be used to email the receipt.</p>
<p>Use secondary Email address set to receive the following mailing type(s)</p>	<p>If this option is selected, the donor's secondary email address, if any, will be used to email the receipt for the selected mailing types. If the user has no secondary email address, the primary address will be used.</p>

5. Click the **Generate Email Receipts** button. A "Processing" message appears while DonorPerfect Online processes the email messages. Once processing is finished, the Email Results screen will appear (see next section).



Viewing Email Results

The Email Results screen displays the results of your attempt to generate email receipts:

- If the system encountered problems with sending out some or all of your email receipts, those records will be listed on the **Missing/Invalid Email** tab.

The screenshot shows the 'Missing/Invalid E-Mail' tab selected. A note states: "Note: All errors will be updated to Paper Receipt Preference and placed in open Paper Receipts batch (next step) if selected below." The table below lists two failed receipts:

Select	Name (ID)	E-Mail	Gift Date	Amount(\$)	Pledge Amount(\$)	TY #	E-Mail Template	Reason
<input checked="" type="checkbox"/>	Fred Garvin(41)	fredgarvin01@gmail.com	5/20/2010	\$50.00	\$0.00	07	Special Event	Error Sending E-Mail: The Email Template Official Receipt is empty
<input checked="" type="checkbox"/>	Jacob Dotsaur(6)	dotsaurus@gmail.com	5/20/2010	\$50.00	\$0.00	07	Special Event	Error Sending E-Mail: The Email Template Official Receipt is empty
				Total:	\$100.00	\$0.00		

Summary: Total Count: 2, Gift Total: \$100.00, Pledge Total: \$0.00. A button 'Export To Excel' is visible. A message at the bottom says 'You Still Have 2 E-Mail Receipts Pending'.

- Those receipts that were sent out successfully are listed on the Sent tab:

The screenshot shows the 'Sent' tab selected. The table below lists five successful receipts:

Name (ID)	E-Mail	Gift Date	Amount(\$)	Pledge Amount(\$)	TY #	E-Mail Template
Fred Garvin(41)	fredgarvin01@gmail.com	5/20/2010	\$75.00	\$0.00	103	Auction Donation Thank You
Fred Garvin(41)	fredgarvin01@gmail.com	5/20/2010	\$50.00	\$0.00	07	Special Event
Jacob Dotsaur(6)	dotsaurus@gmail.com	5/20/2010	\$50.00	\$0.00	07	Special Event
Leah Zimmerman(111)	DrLeahZimmerman@gmail.com	5/20/2010	\$150.00	\$0.00	01	Standard Acknowledgment Email
Roger Sandstone(16)	rogersandstone01@gmail.com	5/19/2010	\$123.00	\$0.00	01	Standard Acknowledgment Email
			Total:	\$448.00	\$0.00	

Summary: Total Count: 5, Grand Total: \$448.00, Grand Total Pledge Amount: \$0.00. A button 'Export To Excel' is visible.

Once you have finished with this screen, click the **Continue to Letter Receipts** button to go to the Letter Receipts screen.



Important! If you are processing email receipts for gifts that have been marked for **Email and Letter** receipts, you must generate both the email receipt and the mail merge data file for the letter receipt before the receipt number will be assigned to the gift records. Generating just the email receipts and returning to the Receipts page will not complete the receipting process.

Generating Mail Merge Data Files for Letter Receipts

The Letter Receipts screen appears when you have gifts in your system with **Receipt Delivery** settings that specify letter receipts. This screen allows you to generate mail merge data files for those receipts.

E-Mail Receipts (0) > E-Mail Results > **Letter Receipts (7)**

Letter Receipt Criteria Generate Letter Receipts Done

Select	TY #	TY Description	Records
<input checked="" type="radio"/>	01	Standard Acknowledgement	4
<input type="radio"/>	07	Special Event	2
<input type="radio"/>	103	Auction Donation Thank You	1
<input type="radio"/>	All	All-in-One	2
Total:			7

Options:

Date to check seasonal addresses against: 05/21/2010

[How is an address selected for a donor?](#)

Include Tribute Details

Include Flags in Mailmerge

Export to Excel (CSV)

Include Pledge Data for Pledge Payments

Export Template: Default Financial (financial) (shared)

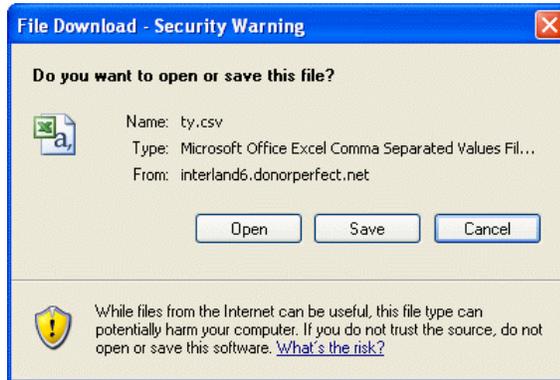
Instant Merge [What's This?](#)

Generate Letter Receipts Done

► To generate mail merge data files for letter receipts

1. From the list of TY # types that appears at the top of the screen, select the acknowledgement letter you want to generate mail merge data files for. At the end of each letter listed, you can see the number of gifts assigned to that letter.
2. Set the following options:
 - a. In the **Date to check seasonal addresses against** field, enter the date. This date will determine which address for a donor is included in the file. For details on seasonal addresses, see “Using the Addresses Screen” in the *DonorPerfect Online User Manual*.
 - b. If you want to include details on tributes that are associated with gifts in the batch, click the **Include Tribute Details** check box. For details on entering tributes and applying gifts to tributes, see “Adding a Tribute” and “Applying a Gift to a Tribute” in the *DonorPerfect Online User Manual*.
 - c. If **Include Flags in Mailmerge** is checked, a field will be added to the export file that contains a comma-separated list of all the flags for each donor.
 - d. If you want the mail merge file to be exported in a format that can be opened in Microsoft Excel, click the **Export to Excel (CSV)** check box.

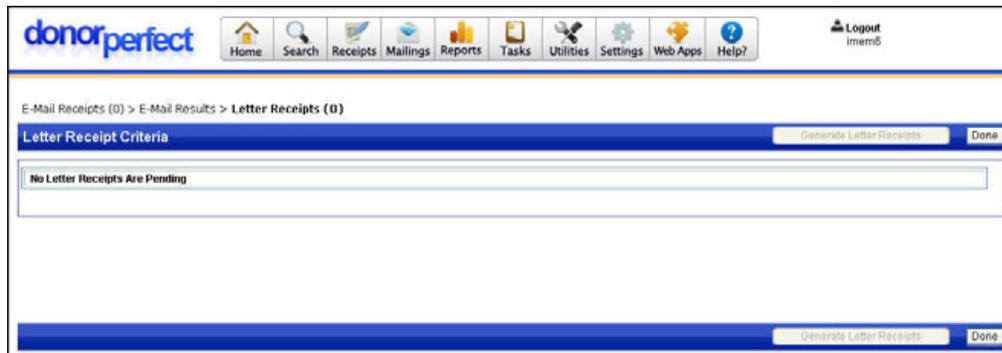
- e. Check **Include Pledge Data for Pledge Payments** to include pledge data such as pledge totals along with gift record data in the export file.
 - f. From the **Export Template** pull-down, choose the template you want to use for the mail merge data file. This template defines which fields will be included in the file you export. For details on export templates, see “Export Templates” in the *DonorPerfect Online User Manual*.
3. Click the **Do** button. The File Download page appears.





Note: Once this action has been submitted, receipt numbers are assigned to each gift.

- 4. Click the **Save** button, go to the location where you want to save the file, and then click **Save**. The file is created, and you can now use Word to customize the acknowledgement letters. See Appendix C in the *DonorPerfect Online User Manual* for more information on mail merge functions.
- 5. Repeat steps 1-4 until mail merge data files have been created for all **TY #** types.



- 6. Click the **Done** button to finish generating letter receipts and return to the Receipts page.

Updating the Batch Number

After you've reviewed gifts and created acknowledgements/receipts, you need to update the batch number. This ensures that each gift in the batch you processed is not reprocessed again at a later time and that each gift batch has a unique number.

► **To update the batch number**

1. From the navigation bar, click on the **Receipts** button.
2. From the **Receipt/Acknowledgment Options** section at the bottom of the screen, select **Update Batch No.**



Update Batch No

A message appears:



3. Click **Yes, Update Batch** to confirm. The batch number is increased by one.

Receipts and Acknowledgments Reports

Overview

The Receipts and Acknowledgments reports allow you to view details on the gifts entered into the system since the last time that acknowledgments were processed. There are three different reports available:

- The **Transaction Listing** lists the gifts entered into the system since the last acknowledgement/receipts processing.

Gift ID	Amount	Pledge Amount	Name	Donor ID	Batch #	Receipt #	FMV	Date	GL	SOL	Type	TY#	Reference
10236	\$100.00	\$0.00	Zimmerman, Leah	111	0		0	08/10/2009					
10235	\$0.00	\$0.00	Bacon, Kevin	69	0		0	08/07/2009*			SC		
10230	\$100.00	\$0.00	Sandstone, Roger	16	0		0	08/07/2009					
10229	\$100.00	\$0.00	Schmidt, Jason	72	0		0	08/07/2009					
10231	\$500.00	\$0.00	Solakian, Ronald	17	0		0	08/07/2009	SEE SPLIT				
10234	\$250.00	\$0.00	Solakian, Ronald	17	0		0	08/07/2009					
Total:	\$1,050.00	\$0.00											
Total FMV:	\$0.00												
Count:	6												

- The **GL Summary Listing** provides a listing by General Ledger code of gifts entered into the system since the last acknowledgments/receipts processing. The Summary listing displays the sum of all gifts for each GL code. If you use the optional Accounting Module, it also has a line for Accounting Code.

GL Code	GL Description	Accounting Code	Donors	Gifts	Gift Subtotal	Pledge Subtotal
-				10	11	\$979.36
bf	Building Fund	14-4500		5	5	\$100.00
UN	Unrestricted	14-4000		1	1	\$400.00
Grand Totals				16	17	\$1,479.36

- The **GL Detail Listing** is similar to the **GL Summary Listing**, except that it lists the individual gifts for each General Ledger code.

[Download Accounting Data](#)

GL Detail Listing For 3/5/2009 to 8/11/2009

GL:

Gift ID	Amount	Pledge Amount	FMV	Name	Batch#	Receipt#	Date	SOL	Type	TY#	Ref
10236	\$100.00	\$0.00	0	Zimmerman, Leah (111)	0		08/10/2009				
10229	\$100.00	\$0.00	0	Schmidt, Jason (72)	0		08/07/2009				
10230	\$100.00	\$0.00	0	Sandstone, Roger (16)	0		08/07/2009				
10234	\$250.00	\$0.00	0	Solakian, Ronald (17)	0		08/07/2009				
10235	\$0.00	\$0.00	0	Bacon, Kevin (69)	0		08/07/2009		SC		
10223	\$146.00	\$0.00	0	Beattie, John R. (12)	0		03/05/2009		CK		
10226	\$146.00	\$0.00	0	Beattie, John R. (12)	0		03/05/2009		CK		
Total:	\$842.00	\$0.00									

Accounting Code:

GL: Building Fund (BF)

Gift ID	Amount	Pledge Amount	FMV	Name	Batch#	Receipt#	Date	SOL	Type	TY#	Ref
10232	\$100.00	\$0.00	0	Solakian, Ronald (17)	0		08/07/2009	0	0		
Total:	\$100.00	\$0.00									

Accounting Code: 14-4500

GL: Unrestricted (UN)

Gift ID	Amount	Pledge Amount	FMV	Name	Batch#	Receipt#	Date	SOL	Type	TY#	Ref
10233	\$400.00	\$0.00	0	Solakian, Ronald (17)	0		08/07/2009	0	0		
Total:	\$400.00	\$0.00									

Accounting Code: 14-4000

Grand Total:	\$1,342.00	\$0.00									
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Running the Receipts and Acknowledgements Reports

- To run the Receipts and Acknowledgements reports
 - In the navigation bar, click on the **Receipts** button. The Receipts and Acknowledgments screen appears.

Receipts

Preview Transactions

Report Formats

- Transaction Listing
- GL Summary Listing
- GL Detail Listing

Filter Options

- All transactions
- User transactions
- Selected Dates: 9/1/2010 - 9/1/2010

Output Options

Report Heading:

Screen
 Printable
 Excel
 Word

More Options

- Current Batch (Batch_No=0)
- Batch Module ID (e.g. 2012_001)
- Include Already Processed Gifts (Previously Received Or Acknowledged)
- Set Selection Filter...

Receipt/Acknowledgement Options

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2. Click on **More Options** to display additional options.
3. Enter or select the following **Selection Options**:

Current Batch Number	The number of the current batch. This number counts up sequentially as you complete and update batches. This field is not editable.
All/User Transactions	Select one of the following options: <ul style="list-style-type: none"> • Select All Transactions to display transactions from all users in the batch. • Select User Transactions to show only your current transactions.
Selected Dates	If checked, the system will select only those transactions that fall within the starting and ending dates you specify, regardless of the batch number.
Current Batch	If checked, the system will only select gifts whose Batch Number is set to 0. This is generally only true for gifts that were added to the system after the last batch was processed.
Set Selection Filter	Check to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" in the <i>DonorPerfect Online User Manual</i> for details.
Include Already Processed Gifts	This option includes gifts that have already been assigned to a batch or assigned a receipt number from the acknowledgement processing. It is cleared by default.

4. Select a report **Type**:
 - The **Transaction Listing** lists the gifts entered into the system since the last acknowledgement/receipts processing.

Gift ID	Amount	Pledge Amount	Name	Donor ID	Batch #	Receipt #	FMV	Date	GL	SOL	Type	TY#	Reference
10236	\$100.00	\$0.00	Zimmerman, Leah	111	0		0	08/10/2009					
10235	\$0.00	\$0.00	Bacon, Kevin	69	0		0	08/07/2009*			SC		
10230	\$100.00	\$0.00	Sandstone, Roger	16	0		0	08/07/2009					
10229	\$100.00	\$0.00	Schmidt, Jason	72	0		0	08/07/2009					
10231	\$500.00	\$0.00	Solakian, Ronald	17	0		0	08/07/2009	SEE SPLIT				
10234	\$250.00	\$0.00	Solakian, Ronald	17	0		0	08/07/2009					
Total:	\$1,050.00	\$0.00											
Total FMV:	\$0.00												
Count:	6												

- The **GL Summary Listing** provides a listing by General Ledger code of gifts entered into the system since the last acknowledgements/receipts processing. The Summary listing displays the sum of all gifts for each GL code. If you use the optional Accounting Module, it also has a line for Accounting Code.

GL Code	GL Description	Accounting Code	Donors	Gifts	Gift Subtotal	Pledge Subtotal
-			10	11	\$979.36	\$0.00
bf	Building Fund	14-4500	5	5	\$100.00	\$0.00
UN	Unrestricted	14-4000	1	1	\$400.00	\$0.00
Grand Totals			16	17	\$1,479.36	\$0.00

- The **GL Detail Listing** is similar to the **GL Summary Listing**, except that it lists the individual gifts for each General Ledger code.

GL Detail Listing For 3/5/2009 to 8/11/2009

GL:

Gift ID	Amount	Pledge Amount	FMV	Name	Batch#	Receipt#	Date	SOL	Type	TY#	Ref
10236	\$100.00	\$0.00	0	Zimmerman, Leah (111)	0		08/10/2009				
10229	\$100.00	\$0.00	0	Schmidt, Jason (72)	0		08/07/2009				
10230	\$100.00	\$0.00	0	Sandstone, Roger (16)	0		08/07/2009				
10234	\$250.00	\$0.00	0	Solakian, Ronald (17)	0		08/07/2009				
10235	\$0.00	\$0.00	0	Bacon, Kevin (69)	0		08/07/2009		SC		
10223	\$146.00	\$0.00	0	Beattie, John R. (12)	0		03/05/2009		CK		
10226	\$146.00	\$0.00	0	Beattie, John R. (12)	0		03/05/2009		CK		
Total:	\$842.00	\$0.00		Accounting Code:							

GL: **Building Fund (BF)**

Gift ID	Amount	Pledge Amount	FMV	Name	Batch#	Receipt#	Date	SOL	Type	TY#	Ref
10232	\$100.00	\$0.00	0	Solakian, Ronald (17)	0		08/07/2009	0	0		
Total:	\$100.00	\$0.00		Accounting Code: 14-4500							

GL: **Unrestricted (UN)**

Gift ID	Amount	Pledge Amount	FMV	Name	Batch#	Receipt#	Date	SOL	Type	TY#	Ref
10233	\$400.00	\$0.00	0	Solakian, Ronald (17)	0		08/07/2009	0	0		
Total:	\$400.00	\$0.00		Accounting Code: 14-4000							

Grand Total: \$1,342.00 \$0.00

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- Optionally, type in a **Report Heading** for the listing. This will appear in the title area of the report.
- Click one of the following buttons:
 - **Screen** displays the report as a regular page in DonorPerfect Online, with the standard navigation toolbar at the top of the page.
 - **Printable** displays the report in a new browser window, without the navigation toolbar. This version of the report is more suitable for printout.
 - **Excel** outputs the report in Microsoft Excel format. You will be prompted to open the report directly in Excel, or save it as a file.
 - **Word** outputs the report in Microsoft Word format. You will be prompted to open the report directly in Word, or save it as a file.

- **Create Acknowledgements/Receipts** automatically creates a data file to be merged into your acknowledgement letters. See “Generating an Acknowledgement/Receipts Data File” below for details.
- **Download Accounting Data:** This button is used with the DonorPerfect Online Accounting Module. Clicking the button transfers the current batch of accounting data to your accounting software. See “DPO Accounting Module (Manual Download)” in the *DonorPerfect Online User Manual* for details.



Note: This is a drillable report. This means that clicking on any of the blue hyperlinked numbers will send you to another page that has an explanation and breakdown of that figure.

Regenerating Receipts

If a receipt is lost or destroyed, DonorPerfect Online can regenerate the gift receipt.

► To regenerate a gift receipt

1. From the navigation bar, click on the **Receipts** button.
2. From the **Receipt/Acknowledgment Options** section at the bottom of the screen, click on the **Regenerate Receipts** button.



Regenerate Receipts

The Regenerate Official Receipts screen appears:

The screenshot shows the 'Regenerate Official Receipts' interface. At the top is a navigation bar with icons for Home, Search, Receipts, Mailings, Reports, Tasks, Utilities, Settings, Web Apps, and Help?. A 'Logout' button is in the top right. Below the navigation bar is the title 'Regenerate Official Receipts'. Underneath is a 'Search Criteria' section with input fields for 'Last Name/Org/ID#', 'First Name', 'Date Range', and 'Amount'. There are also 'Search' and 'Cancel' buttons.

3. Enter the search criteria for the receipt that you want to regenerate.
4. Click the **Search** button. The results of your search will appear below:

The screenshot shows the 'Regenerate Official Receipts' interface with search results. The search criteria are filled in: 'Last Name/Org/ID#' is 'Sandstone', 'Date Range' is '1/1/2009' to '5/21/2010'. The 'Results' section contains a table with one entry:

Select	Donor (ID)	Email Address	Gift Date	Gift Amount	Pledge Total	TY Letter
<input type="radio"/>	Sandstone, Roger (15)	rogersandstone01@gmail.com	01/29/2009	\$100.00	\$0.00	Membership Letter

Below the results is the 'Receipt Options' section with radio buttons for 'Send E-Mail Receipt' (selected) and 'Send Letter Receipt'. There are checkboxes for 'Include Tribute Details', 'Include Flags in Mailmerge', 'Export to Excel (CSV)', and 'Include Pledge Data for Pledge Payments'. An 'Export Template' dropdown is set to 'Default Financial (financial) (shared)'. 'Regenerate Receipt' and 'Cancel' buttons are at the bottom right.

5. To regenerate a receipt as an email receipt:
 - a. Select the receipt that you want to regenerate from the **Results** list.
 - b. Under **Receipt Options**, select **Send Email Receipt**.

- c. Click the **Regenerate Receipt** button. A preview of the receipt will appear:

- d. If desired, you can enter additional text into the regenerated email receipt message by typing it into the Include Text field.
- e. Click the **Send** button to send the regenerated email receipt, or the **Close** button to cancel sending the receipt. If you sent the receipt, you will see a message stating that it has been sent:

6. To regenerate a receipt as a printed letter:
- Select the receipt that you want to regenerate from the **Results** list.
 - Under **Receipt Options**, select **Send Letter Receipt**.
 - Set the remaining Letter Receipt options. See “Generating Mail Merge Data Files for Letter Receipts” on page 19 for details on these options.
 - From the **Export Template** pull-down, choose the template you want to use for the mail merge data file. This template defines which fields will be included in the file you export. For details on export templates, see “Export Templates” in the *DonorPerfect Online User Manual*.
 - Click the **Regenerate Receipt** button. You will be prompted to save the mail merge data file.
7. When you are done regenerating receipts, click the **Cancel** button to return to the Receipts screen.