# How to Print Receipts and Run Update to Master

This article relates to running the pre-printed receipts which @EASE uses. By using the pre-printed receipts it will be the Red number on the pre-printed form which will be assigned to receipts as they print.

There are two other forms of receipts available. There are eReceipts which are emailed and PDF receipts which create a hardcopy printout of the receipt both use a numbering system managed by @EASE.
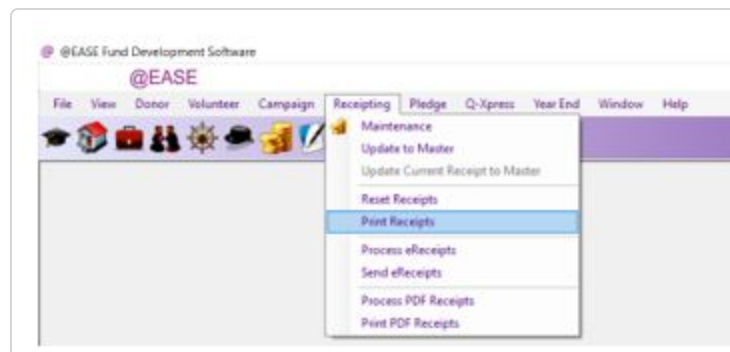
All three types of receipts should have unique numbering sequences. The receipt number field is an 11 digit number so there is lots of room for unique sequences.

**\*\* Warning, we recommend using no more than 10 digits as depending on the start number, you can exceed the numbers available. \*\***

Run Update to Master or U2M once all receipts have been verified as correct and receipts are printed. This makes changes should you need any, easier to accomplish.

**Printing Hardcopy Pre-Printed Receipts**

To print hardcopy pre-printed receipts use the Receipting Menu and choose Print Receipts.





The Batch Number was entered. In the case above, there was only one batch being printed to the From and To values are the same.

We clicked Refresh Receipt List and the three receipts to be printed appeared. The Number of the first Receipt in Printer is the next available number on the preprinted receipts found in Red on the top right corner.

How your printer selects the next page to print needs to be considered so that the number on the Receipt in Red matches the cross-reference number printed below the date on the receipt.



## Resetting a Receipt

Only preprinted receipts can be reset. If the printer pulls two sheets of paper instead of one when printing receipts the number in red will no longer match the cross-referenced number. A reset and reprint is required.

To reset one or more receipts use the Receipt Menu and select Reset Receipts.

Use the Batch number where the problem receipt exists to locate the receipt in question. If there is only one receipt or a small range of consecutive numbers the receipt number range can be entered along with the date.  However, the shortest, easiest method is just using the Batch Number to accomplish this goal. Only highlighted receipts are reset which the Reset button is checked. A confirmation window appears in the event an error has been made.

Once reset, the receipt can be reprinted. The paper code of the receipt in error should be marked as VOIDED and place in the folder with other receipt copies in numerical order.

## Running Update to Master

We have successfully printed a set of receipts for donations received in January. Our next step is to run Update to Master using the same Batch Number range as we used in the print sequence.

Much to your surprise, when you tried to update the batch of January receipts the following message came up:



The reason this failed, has to do with the current fiscal year which ends on December 31, 2020 in our test database. Your fiscal year-end might be different, but the issue here is that our fiscal year ended without the year being moved forward. @EASE will not U2M any records where the receipt date exceeds the year-end date.

Running U2M updates the donor's Summary Profile record with accumulated transactions in the current fiscal year. Which column is updated is dependent on the Campaign used for the transaction. If the transaction is a Donation the Donation Count is incremented by one. The donor's Last Year donated is updated. For new donors, the First and Last Year values are both updated.

U2M updates the Campaigns Donations found in the Campaign Profile and the Contribution tab adding one to the count of transactions by dollar range.

Where a Campaign Response File exists for a larger Ask, the donor's record is updated with a Check Box indicated gift received.

**When do you run U2M?**

We recommend running it as soon as you have confirmed your data entry to be correct using the Batch Report and once receipts have been printed.

This will keep all activity in the @EASE database current and up to date.

Batsch Group Team

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