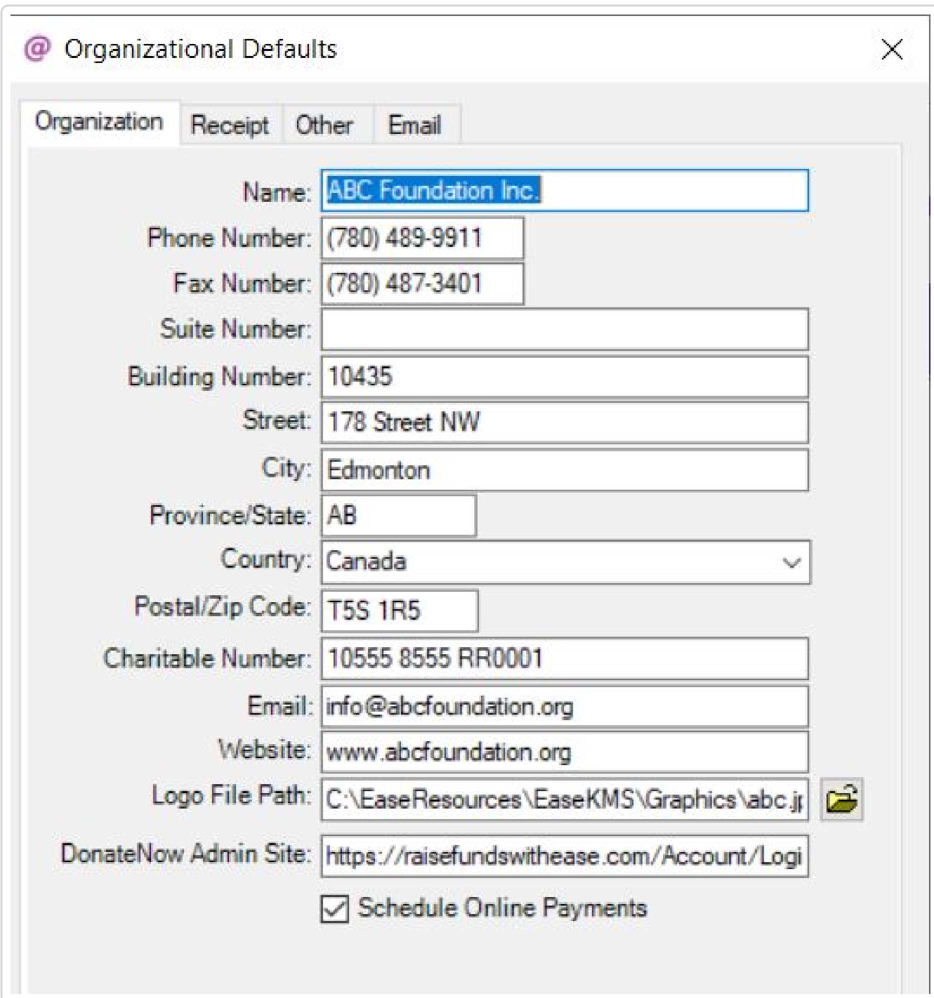
Organization Defaults Organization Tab

Organizational Defaults is found under System Maintenance. This area sets up the charity with its fiscal year values, name and contact information, country and more.

Only level one administrators should have access to this area.

There are four tabs under Organizational Defaults which are important. The Bank tab is no longer in use.

Organizational Defaults - **Organization Tab**



1. Name of the Charity

The Name of the Charity appears on the top of all reports. Part of the name is used for the CIBC EFT export file created when exporting donation for bank withdrawal processing.

2. The City in the charity address field is the default value for the City field used for new Private and Corporate address records.

3. The Country is an important field as it determines the formatting of the postal code. Where the country is Canada the format is LNL NLN where L is a letter and N is a number with a space between the two segments.

Where the country is the USA five digits with a space or dash followed by 4 digits is the format. Please note: The space or dash character must be added by the person making the entry. It is preferable to use leading zeros to ensure uniformity to assist in reporting.

If the country is not Canada or the USA, the postal code goes to a free format field 10 characters in length.

Please Note: Where a separator character is used in the postal code, like a space or dash, be sure to put it in, as it will impact on reports.

4. Charitable Number, Email and Website are used for eReceipts, PDF Receipts and creating a printed copy of a receipt should a donor lose their copy.

5. The Logo File Path takes you to a .JPG file of the logo resides. This should be no larger than 100 KB. Due to size constraints, a smaller version of the logo may be required from a print perspective.

6. Donate Now Admin Site is the path to the Donate Now should a charity have one.

7. **NEW Schedule Online Payments.** Check this box if you are using iATS Payments for monthly pledge payments or Donate Now for Pledged donations. See the **Receipt Tab** to ensure your iATS Agent Code and Agent Password are correct.

Last updated on November 21, 2021

Organizational Defaults Receipt Tab

Receipt Tab

@EASE can provide several forms of receipts, **all of which need unique number sequences**. The receipt number in @EASE is 10 digits long, so this should not be an issue.

Receipt Types:

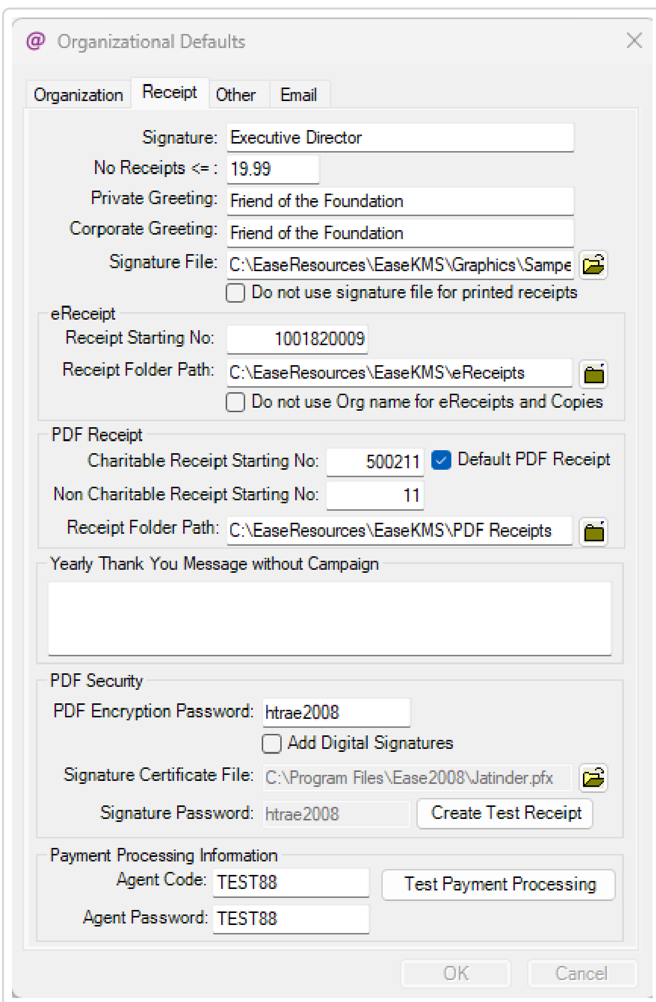
a. Hard copy preprinted receipts

b. eReceipts for charitable donations entered through @EASE

c. PDF receipts for charitable donations entered through @EASE. This provides a hard copy for the donor.

d. PDF receipts for non-charitable donations entered through @EASE. This provides a hard copy for the donor. *** You can also provide a non-charitable receipt for a charitable donation given by another charity. This was added as an audit trail feature so that clients could properly record charitable donations where no receipt is required.

e. Donate Now online donations provide an immediate eReceipt for charitable donations.



1) The Signature field is usually used to show the position of the person who signed the receipt. In some cases, it is used to give an inspirational comment. This field is 45 characters long.

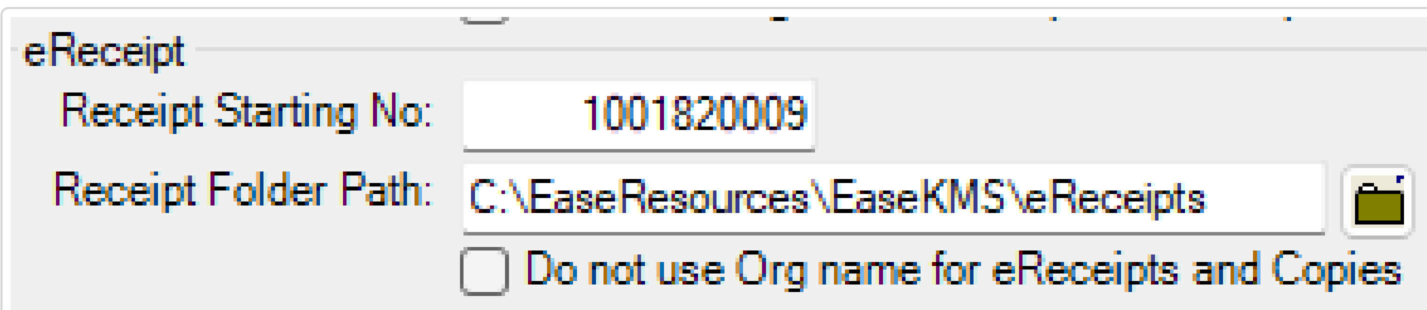
2) No Receipts <=: Some charities have decided to limit the value they will receive due to costs. If a charity receipts for $10.00 or more, this field would show $9.99.

3) Private Greeting is used by selecting the <Default> Salutation. This value is selected when a donor has no other salutation and either no first name or a first name, which is only an initial, as in the case of S. Jones. The Private Greeting provides a proper value in the Greeting field on the Q-Xpress Export file. The same is true for Corporate Greeting where there is no contact person, or the contact person's name has no salutation or a first name, which is just initials.

4) The Signature File paths to the location of a signature file. The file type must be .BMP (bitmap) and should not exceed 100 KB in size.

5) The checkbox "Do not use signature file for printed receipts." is checked only where eReceipts use a signature file which would be required, but printed receipts do not.

eReceipt



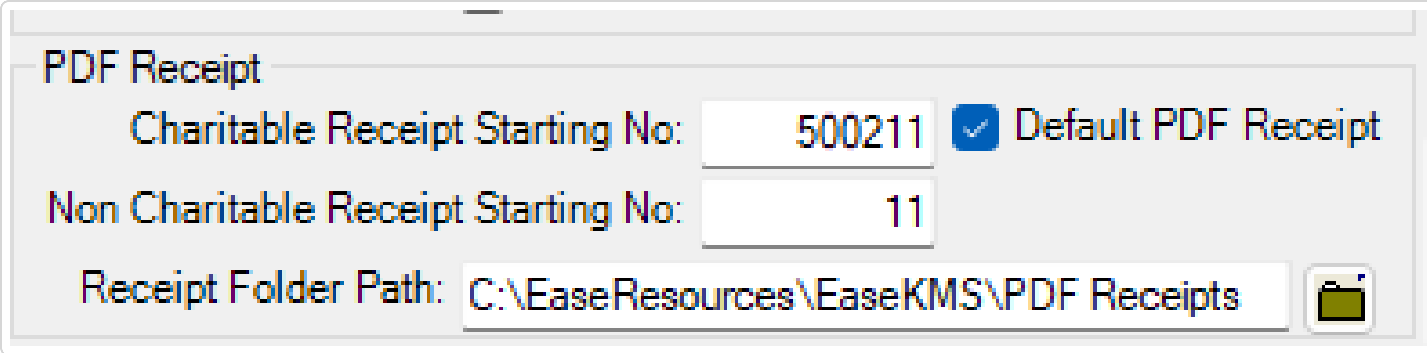
6) eReceipt Starting No: eReceipts should have a different numbering sequence than regular printed receipts. The eReceipt number field is 11 digits in length and numeric in character, so a much different number is allowable. Once the numbers start being used this field should not be modified. It does allow change, but with a warning message.

7) eReceipt Folder Path: eReceipts need to be kept. This is the path @EASE will use to store the PDF versions of the eReceipts created.

*** **Do Not Use Org Name for eReceipts or Copies**

The check box below the eReceipt path is used to indicate if the Organization Name should be printed on the eReceipt or PDF Receipt under the Logo area.

PDF Receipt

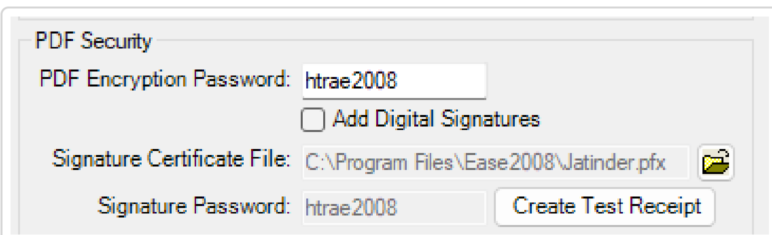


8) @EASE can create both charitable and non-charitable PDF Receipts. To invoke the non-charitable receipt a charitable number must be provided.

The Receipt Folder Path is used to save both types of receipts.

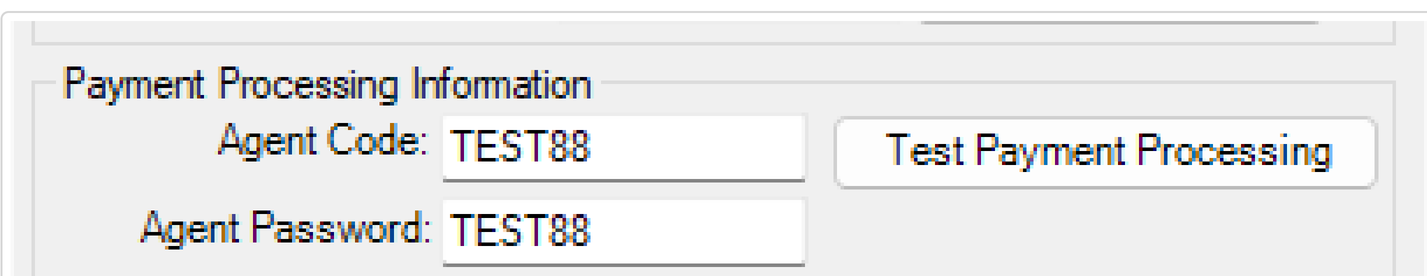
9) Yearly Thank You Message without Campaign: Used for gifts accumulated for one receipt regardless of campaign.

PDF Security



1) PDF Encryption Password: this is a password selected by the charity to prevent the PDF files from being opened. Any value is acceptable but there should be enough characters to prevent the password from being broken.

Payment Processing



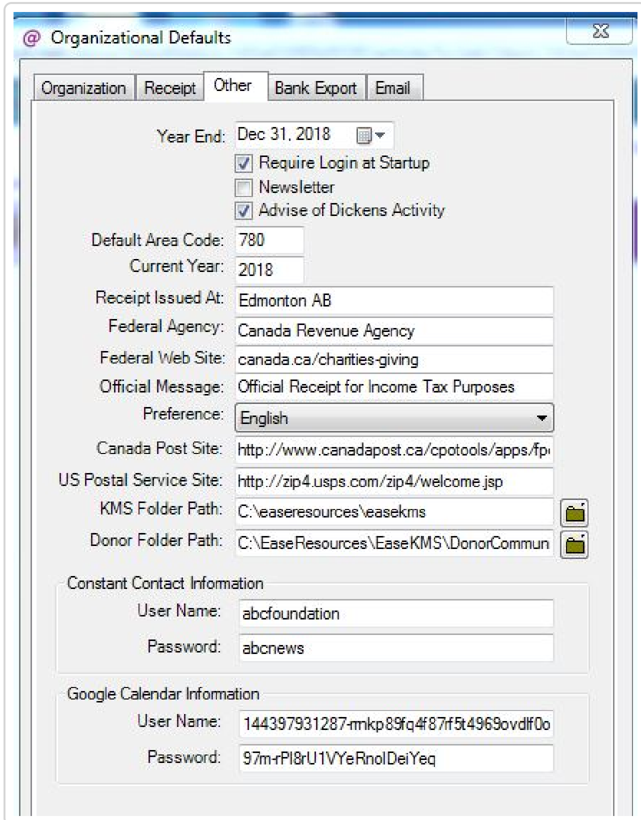
2) Add Digital Signatures is not yet available.

1) To use the PayNow button for credit card payments from the Receipt Maintenance window an Agent Code and Agent Password is required. These are obtained from IATS Payments.

Last updated on September 25, 2023

Organizational Defaults Other Tab

Other Tab



1) The **YEAR END DATE** is a **CRITICAL FIELD** and once defined should **NEVER** be modified. @EASE updates the year-end date once all year-end processing has been successfully completed through the Fiscal Year-End \ Update Fiscal Year. The Year-End date is used to prevent Update to Master on receipts that fall into the upcoming fiscal year and it provides the date parameters for features like Recalculate Update to Master for campaigns and donors.

2) Current Fiscal Year The **CURRENT FISCAL YEAR** like Year End Date is another **CRITICAL FIELD**, that once defined should **NEVER** be modified. The Current Fiscal Year is used to update the first and last year donated for first-time donors and at year-end updates the last fiscal year a donor has contributed. The Campaign file accumulates total donations based on the fiscal year, as do the Donor Summary and Volunteer Summary files. The Current Fiscal Year is updated through the Fiscal Year End\ Update Fiscal Year process.

3) Required Login at Startup should remain checked otherwise the Windows login is used. If this login and password are incompatible with the Ease login and password, the user is locked out.

4) Newsletter where checked will automatically check every new donor's Newsletter field. We do not recommend using this method to decide who does and who does not receive a newsletter.

5) Advise of Schedule Activity ensures that all messages recorded in Dickens are delivered to the user, the moment they login.

6) Default Area Code: This determines the default area code used for all phone numbers during data entry. The value can be modified at the point of entry.

Canada Revenue Agency Required Fields

Users from countries other than Canada, can ignore the next 4 fields.

1) Receipt Issue At: Enter the name of the town

2) Federal Agency: This should read Canada Revenue Agency

3) Federal Web Site: This should read www.canada.ca\charities-giving

4) Official Message: This should read

"Official Receipt for Income Tax Purposes"

Constant Contact Information for List Management

User Name: Enter the Constant Contact username

Password: Enter the Constant Contact password

Google Calendar

User Name: Special set up is required. Please contact Batsch Group

Password:

Remaining Fields Language Preference, Postal Tables, & KMS Folders

1) Preference: This refers to language preference and is populated by the Language pull down found in the Look Up Tables. This is the default language of all entries and only those records where the language preference is other than entered here will have values on the master records. For example, if the language preference is English, only those private or corporate records who have expresses a wish to have their communications in a different language will actually have coding in their record. All others will default to the value found in here.

2) The Canada Post and US Postal Service sites are used to access websites for addressing purposes.

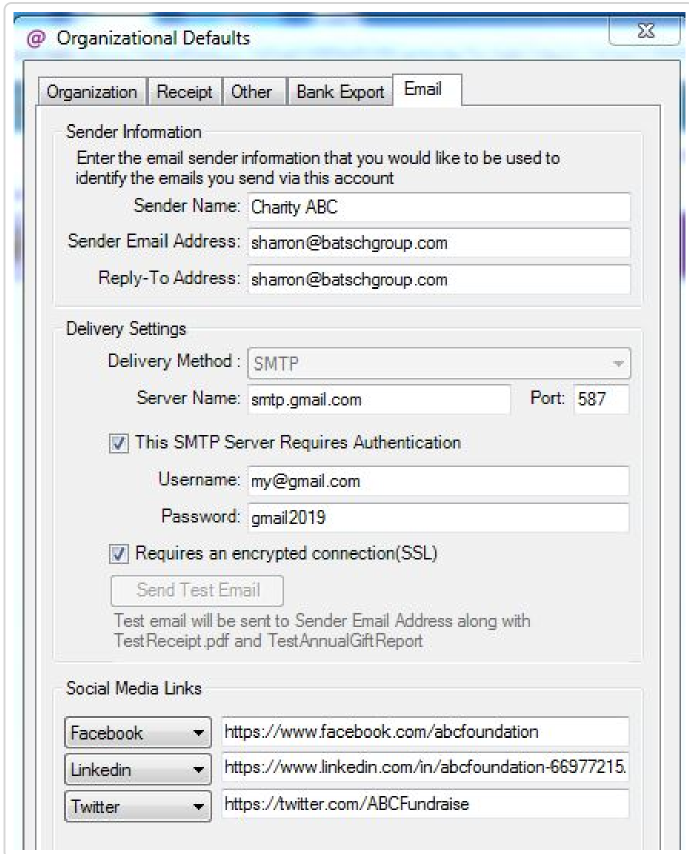
3) KMS Folder Path: This path is used to help manage all electronic source documents.

4) Donor Folder Path: This is a sub-path and found within the KMS path. It is used to help organize documents, pictures and general communications with key donors.

Last updated on April 21, 2022

Organizational Defaults Email Tab

Email Tab



Sender Information

1) Enter the Sender Name which is the name of your charity.

2) Sender Email Address: This is the address you are sending from.

3) Reply To Address: This is the address being replied to. We are suggesting that this be the address used to pick up all invalid email addresses when messages are returned.

Delivery Settings

1) Delivery Method: is SMTP and the Port is most often 25. Port 1025 is also used.

Where smtp.gmail.com is the outgoing mail the port is 587.

2) Server Name: Enter the name of your server.

3) Authentication is required for Exchange Servers

The next two fields provide validation.

4) Enter the User email.

5) Enter the Password of the user's email

6) Requires an encrypting connection (SSL) is not yet in use. *** **Check this when using port 587**.

7) Click the OK button to activate the Send Test Email and you will get an email as well as a sample receipt.

8) Social Media Links

@EASE currently provides four possible social media links but only publishes three. Linkedin, Facebook, Twitter or Instagram.

When set up these will appear on all eReceipt email messages.

Last updated on November 21, 2021