Setting up Organizational Defaults

Features to Note:

1. **Signature File Check Box:** Do not use signature file for printed receipts

    A signature file is required for eReceipts. Check this box if you do not wish the signature file to be used on paper receipts.

2. **eReceipt Starting No:** This number can be up to 11 digits in length. It is a numeric field but shows with a letter E on the receipt to indicate it as an eReceipt. You can modify this number once receipting as started but this is NOT recommended and a warning message is displayed.

3. **eReceipt Folder Path:** A folder needs to be set up for accommodate the storage of all eReceipts. They can be archived by calendar year.

4. **PDF Security:** An Encryption Password is required to protect PDF files from being compromised.

5.   The **Sender Name** is the name of your organization.

6.   **Sender Email Address**: This is the email address you send from.

7.   **Reply To Address:** This is the email address to want replies to … we recommend setting up a special email address for this situation as invalid emails will be returned here.

8.   **Delivery Settings:** Enter your server name.

9.   **SMTP Server Requires Authentication:**

      For clients using an **Exchange Server**

          ➢ Check the SMTP Server Requires Authentication box and
          ➢ Enter the server Username and Password.
Click Save and send yourself a test email.

sharron@batschgroup.com   ✉ 🔗 @Ease Test Email   93 KB   Tue 09/08/2011

Setting up a Campaign to Enable eReceipts

This is a regular Direct Mail campaign we created for this seminar.

Once created and saved, go to the Profile to find the Email tab.

Without the Email tab filled in, eReceipts will not be created.

Preparing Donors for eReceipts

Donors will only receive an eReceipt if the eReceipt box on their master record is checked off or if you happen to click the eReceipt check box on the Receipt window.

Ideally, you want to find out which donors want to receive eReceipts and make that request on their main Private or Corporate master window.

For Corporate donors to prevent eReceipts from travelling all over the place we require a special eReceipt Email address using the descriptor eReceipt. This can be carried in either the first or second position on the main master window. I cannot be used on a contact record.

We have created a special Email Type called eReceipt that will appear in your Email Lookup Table once your updates are complete.

Private donors do not require an eReceipt value unless they want to use an email address other than their primary email which should always appear in the first Email place position. Should a second eReceipt email address be requested that is different from their Primary email it can reside in the second place position for Email addresses.

This shows us that both general emails and eReceipts will be delivered to the same email address for Kelly Abbott.

This is a corporate record that has requested eReceipts. Note that eReceipt has been checked and that a special email address with the description EReceipt is found in the email addresses.

Without EReceipt, this business could not receive eReceipts.

Entering a Donation for an eReceipt

There is nothing different about entering a donation for an eReceipt. Where the different lies is in the creation and delivery of the receipt itself.

When we entered the donation for Kelly, the eReceipt value was automatically checked. Had we forgotten to check it on her master record, we could have checked it here.

Preparing eReceipts for Email

We have entered all the receipts we are interested in.

Click on Receipting and select Process eReceipts
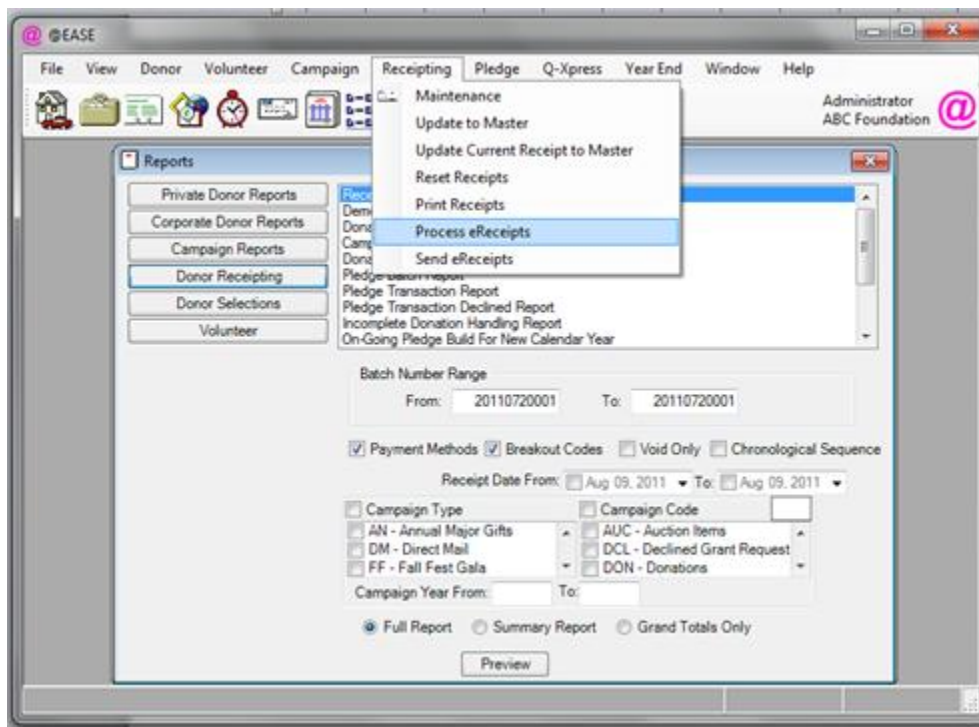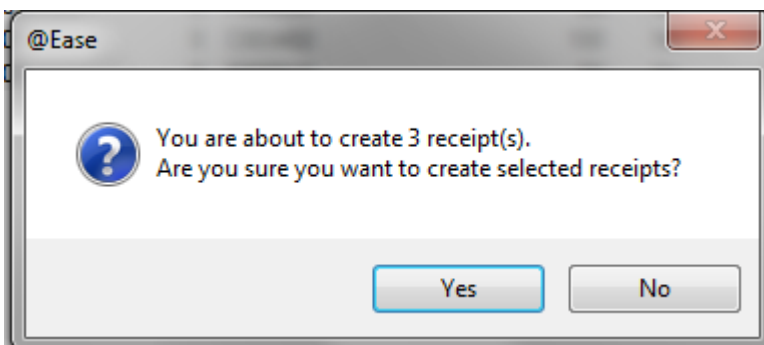
Enter the Batch Number range and click Create eReceipt at the bottom of the window.

Please Note: Currently only Charitable Receipts can be created and sent via email in this manner.
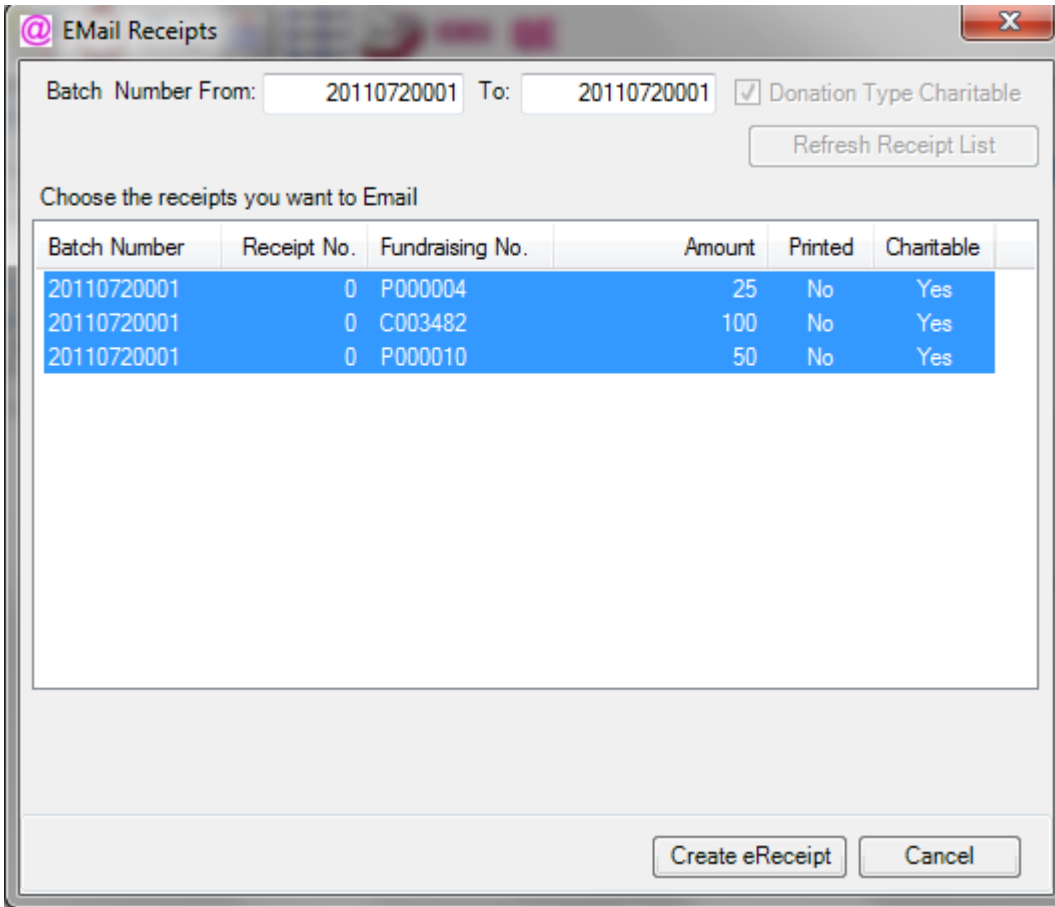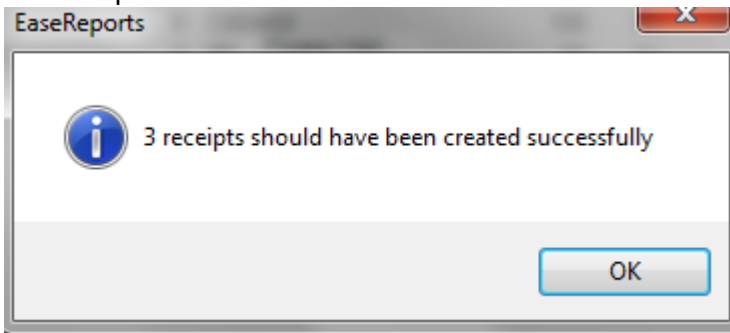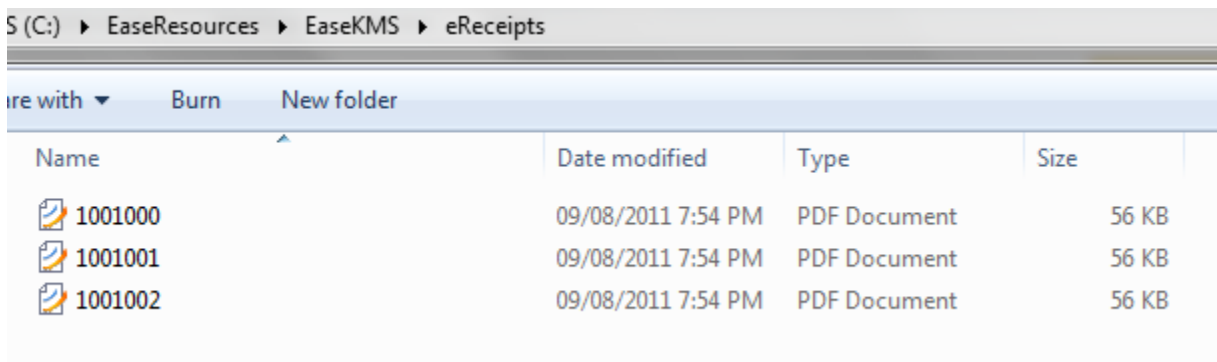

The following window appears:



Click Yes to continue.
Followed by:

We have now created the eReceipts. If you go to your eReceipt folder you will see that they exist and if you check Organizational Defaults, you will see that the eReceipt number has incremented.

The time has come to try and send the Receipts, so return to the Receipting menu and select Send eReceipts.
The Send option uses the batch number used to create the receipts.
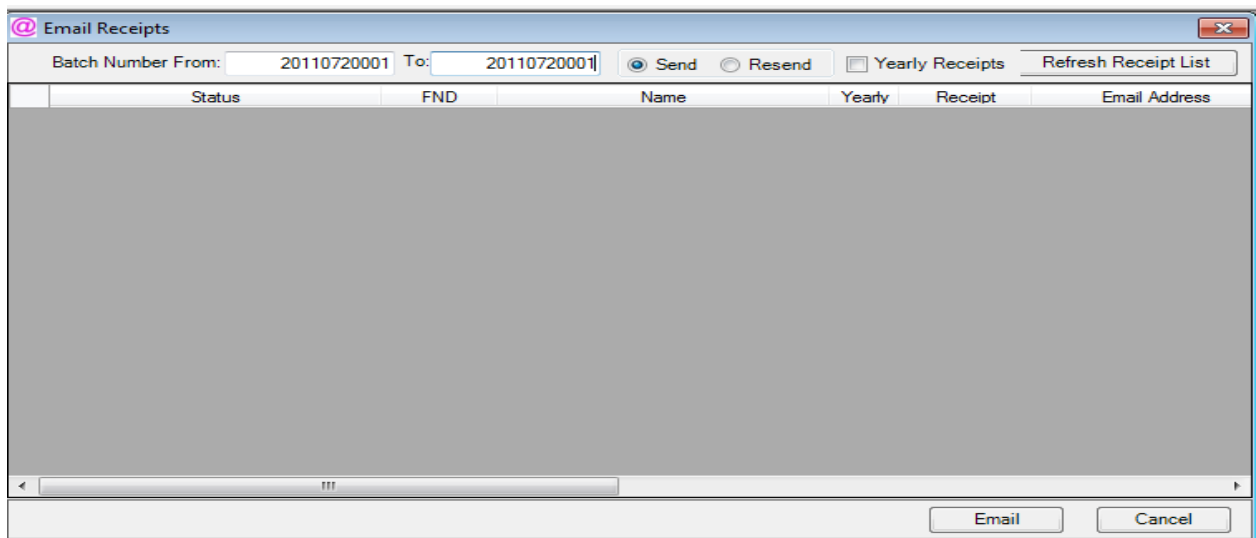
Note that you can do an initial Send and if a problem occurs you can run a Resend. Yearly Receipts are also identified through this window. Click Refresh Receipt List to see what the Status is for the receipt you wish to email.

Note that John Hamm does not have an email address. Other messages could relate to a company without an EReceipt email identified or a Campaign where the Email tab has not been filled in.

We can go to John Hamm's record and add an email for him and click Refresh Receipt List a second time so that @EASE recognizes the fix.

With the Status clear we can now Email the receipts.

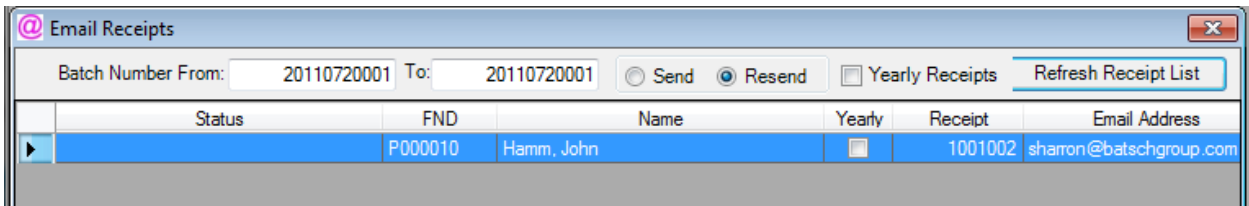For our purposes, I gave John Hamm my email address and selected only his record to email.

Once an email has been sent, the window refreshes and the sent email no longer shows up.

Here is a sample of Refresh Receipt List with Resend for the same batch number range.


Q-Xpress Receipting Amount Payment Method Date

We added one receipt to this batch that is not an eReceipt but a regular printed receipt. We want to send a letter of thanks to this donor but we do not want to have all the eReceipt records exported along with it.

Using Q-Xpress Receipting Amount Payment Method Date we selected all the donations recorded in the batch 20110720001.
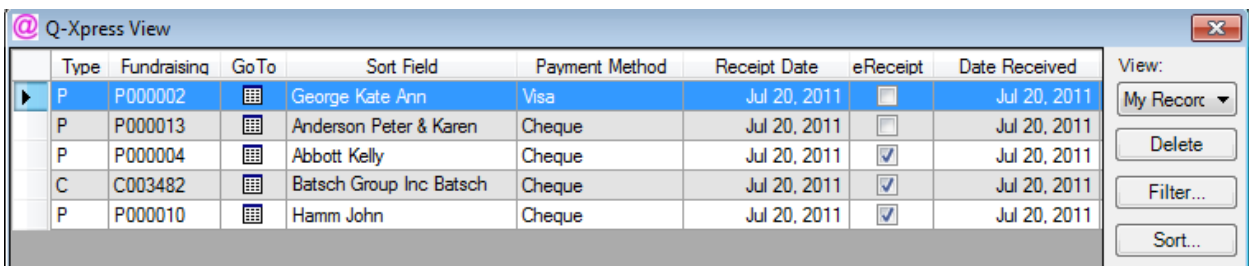
Note the eReceipt column. We can remove these records by highlighting them and clicking Delete at the top right, or we can remove them when we export the records to create a Mailmerge.txt file for letters. To exclude eReceipts leave the Check Box blank. To include them, check the box.
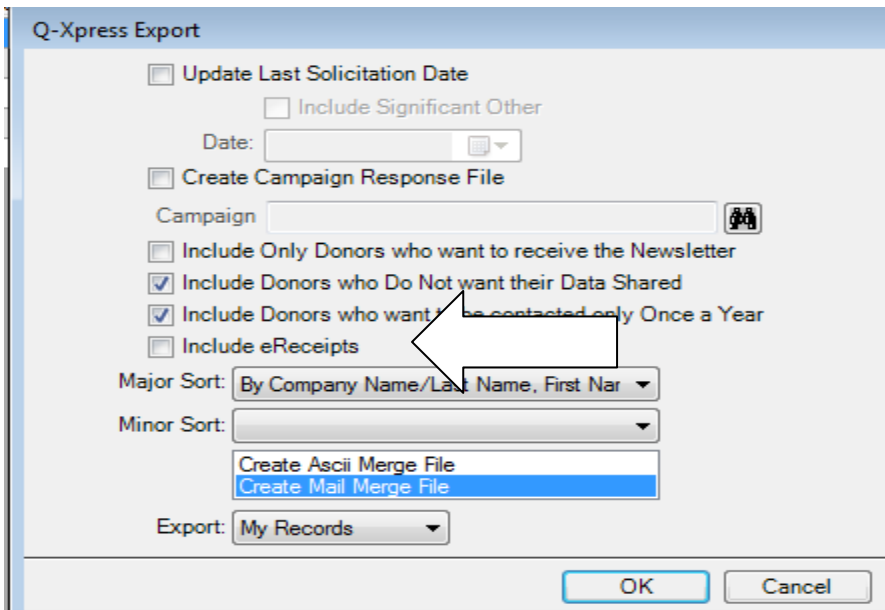
There is one last feature you need to know about.

How do identify those donors who want eReceipts

First, you need to Ask … if they want eReceipts. If they indicate a yes, you can assign them individually or you can use Q-Xpress to select a group of donors, possibly identified with a Quality or Membership (with a date). As long as the email value is present you can do a Select All and a global assign of the eReceipt value.
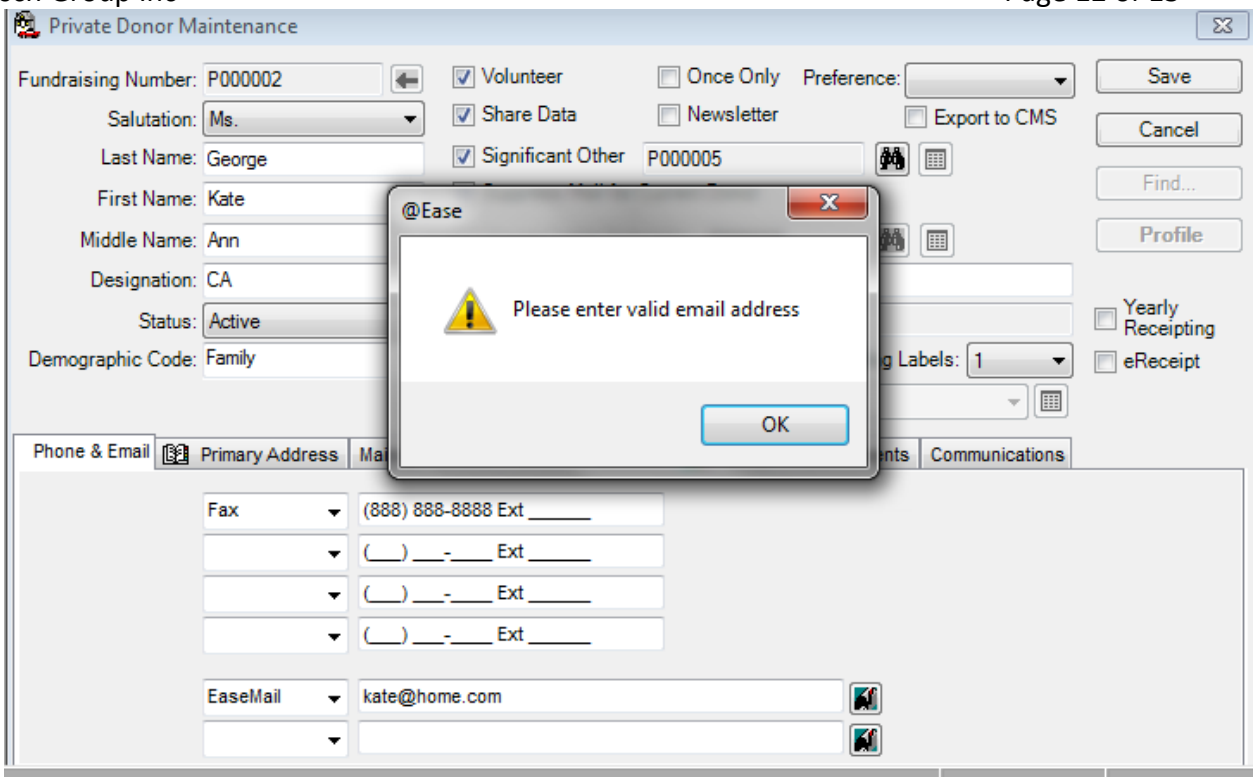
Adding eReceipt will update all unprinted receipts to enable eReceipts, removing the value with disable the eReceipt.
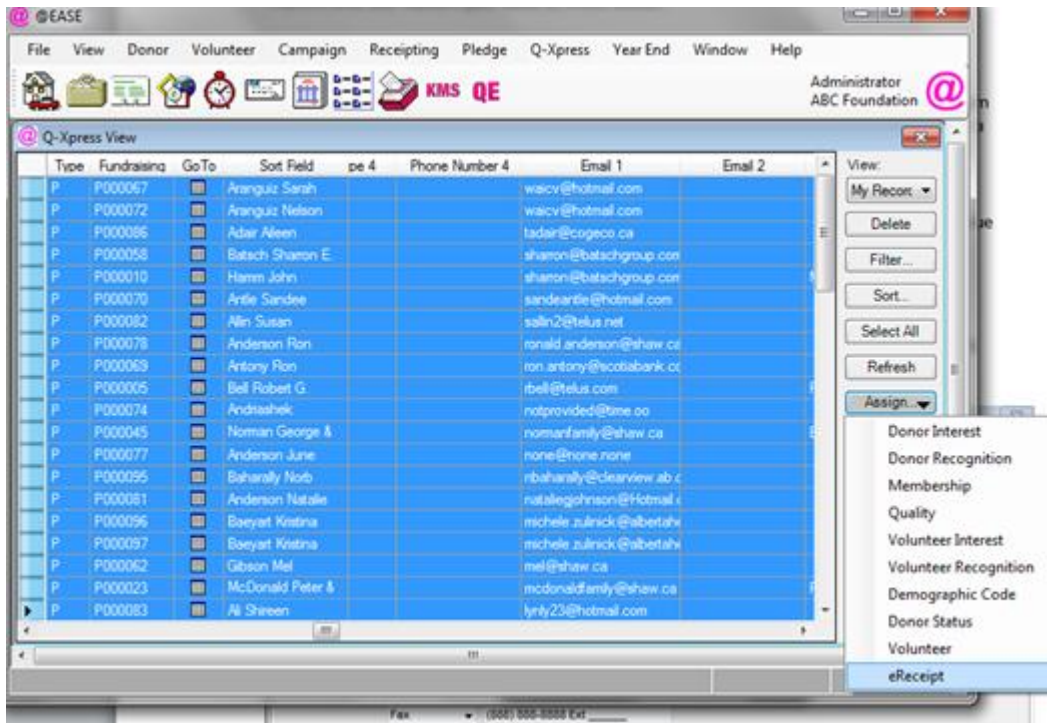
Validating an Email Address for Format Only

When entering an email address @EASE does not confirm that the email is correct, but it does do a format check.

Erase or removed unwanted characters to remove the validation error message.

In this example, a space added to the end of "kate@home.com " making it invalid.

Yearly eReceipts

Yearly eReceipts are create through the Yearly menu in the same way was regular yearly receipts are created.
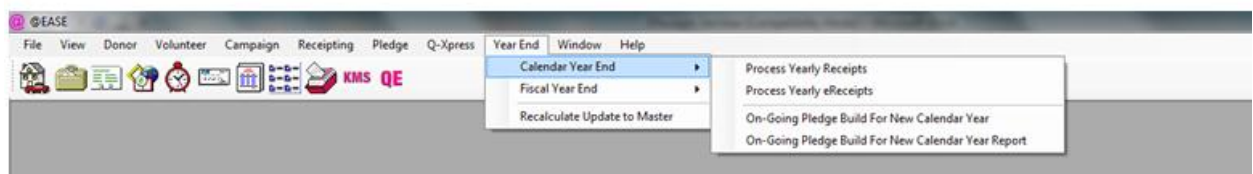
The window is the same as regular yearly receipts except that here we are just creating them.

To Send them we need to go through the Receipting menu selection Send eReceipts

Here is may sample email:

And the sample Receipt … no signature file was used for this sample
there was no logo identified in Org Defaults.