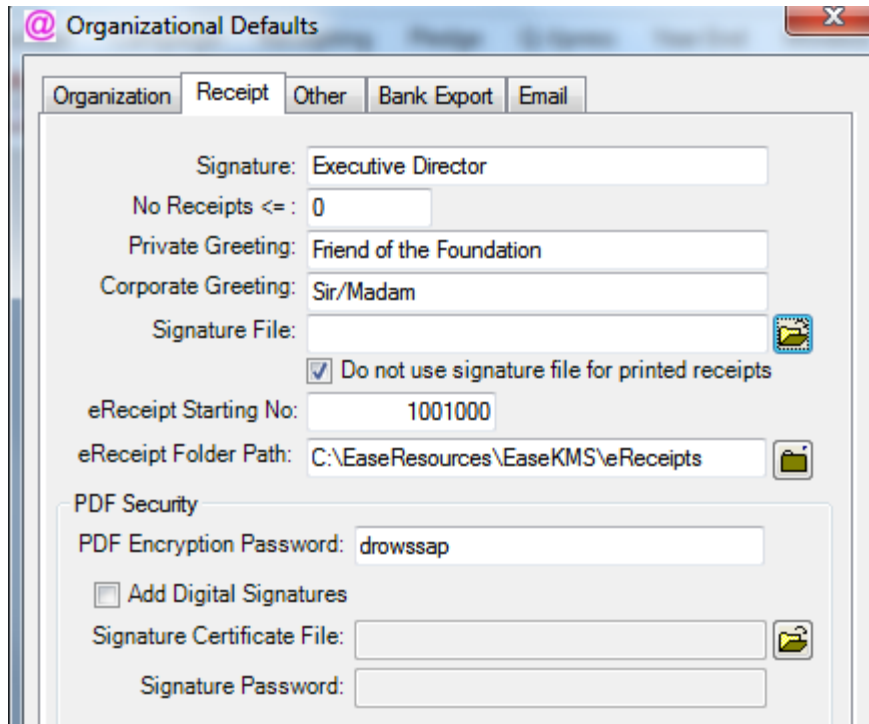


## Setting up Organizational Defaults



The screenshot shows a dialog box titled "@ Organizational Defaults" with a close button (X) in the top right corner. The dialog has five tabs: "Organization", "Receipt", "Other", "Bank Export", and "Email". The "Receipt" tab is currently selected. The fields and their values are as follows:

- Signature: Executive Director
- No Receipts <= : 0
- Private Greeting: Friend of the Foundation
- Corporate Greeting: Sir/Madam
- Signature File: (empty)
- Do not use signature file for printed receipts
- eReceipt Starting No: 1001000
- eReceipt Folder Path: C:\EaseResources\EaseKMS\eReceipts
- PDF Security section:
  - PDF Encryption Password: drowssap
  - Add Digital Signatures
  - Signature Certificate File: (empty)
  - Signature Password: (empty)

### 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.

The screenshot shows a software window titled "@ Organizational Defaults" with a close button in the top right. It has several tabs: "Organization", "Receipt", "Other", "Bank Export", and "Email". The "Email" tab is active. Under "Sender Information", there is a text box for "Sender Name" containing "ABC Foundation", a text box for "Sender Email Address" containing "sharon@batschgroup.com", and a text box for "Reply-To Address" containing "sharon@batschgroup.com". Under "Delivery Settings", there is a dropdown menu for "Delivery Method" set to "SMTP", a text box for "Server Name" containing "shawmail.ed.shawcable.net", and a text box for "Port" containing "25". There are two checkboxes: "This SMTP Server Requires Authentication" (unchecked) and "Requires an encrypted connection(SSL)" (unchecked). Below these is a "Send Test Email" button.

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.

## Setting up a Campaign to Enable eReceipts

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

The screenshot shows the 'Campaign Maintenance' window with the following details:

- Campaign Year:** 2011
- Campaign Type:** DM
- Campaign Code:** DON
- Description:** 2011 Direct Mail Donations
- Start Date:** Jun 13, 2011
- End Date:** (empty)
- Mailed Appeals:** 0
- Mailed Reminders:** 0
- Breakout Code:** DirectMail
- Receipt Required:** Yes (Based on Lowest Dollar Value Rec)
- Letter:** DirectMail
- Goal Value:** \$0.00
- Membership
- Charitable
- Yearly Receiving
- On-going
- Ticket Number Unique
- Donation Category:**
  - Ticket Sale/ Registration
  - Registration/Ticket Cost: \$0.00
  - Received Value: \$0.00
  - Donations
  - Marketing Donations
  - Merchandise
  - Participation
- Print on Receipt:**
  - Gift in Kind
  - Thank You's

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

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

The screenshot shows the 'Campaign Profile for 2011DMDON' window with the 'Email' tab selected. The content is as follows:

- Email Subject:** Direct Mail Thank You Message and Receipt
- Email Body:**

Thank you for your thoughtful donation. Gifts from the Direct Mail campaign will be used to upgrade the ABC Family Camp.

For more information about the AFC please click on the following link: [www.abcfoundation.org/ABC Family Camp](http://www.abcfoundation.org/ABC%20Family%20Camp).

To follow us on Facebook click to join [www.facebook.com\ABCFoundation](http://www.facebook.com/ABCFoundation).

or join us on Twitter to hear the latest updates.

We appreciate your support.

ABC Foundation

## 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.

The screenshot shows the 'Private Donor Maintenance' window for a donor named Kelly Abbott. The 'Fundraising Number' is P000004. The donor's status is 'Active' and their demographic code is 'Family'. The 'eReceipt' checkbox is checked, and a white arrow points to it. The form also shows a 'Phone & Email' section with a 'Home' phone number and an 'Email' address: kelly.abbott@gmail.com. Other fields include 'Volunteer', 'Share Data', 'Significant Other', 'Last Solicitation', 'Recognized As', 'Link Field', and 'Mailing Labels'.

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.

The screenshot shows the 'Corporate Donor Maintenance' window for Batsch Group Inc. The Fundraising Number is C003482. The Contact Person is Sharon Batsch, Status is Active, and Last Solicitation is Jun 01, 2008. The Demographic Code is Small Bus. The 'eReceipt' checkbox is checked. The 'Phone & Email' tab is active, showing Business and Fax numbers, and two email addresses: ease@batschgroup.com and accounting@batschgroup.com.

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.

The screenshot shows the 'Receipting Maintenance' window for Kelly Abbott. The Fundraising Number is P000004 and the Batch Number is 20110720001. The Receipt Date is Jul 20, 2011, and the Date Received is Jul 20, 2011. The Campaign is 2011DMDON 2011 Direct Mail Donations. The Payment Method is Cheque, Chq/Conf number is 123, and the Donation Type is Charitable. The Receipt Required is Yes (Based on Lowest Dollar Value f). The Amount is \$25.00. The Receipt Number is 0. The Letter is DirectMail. The 'eReceipt' checkbox is checked. A breakout table is visible:

Breakout	Amount
DirectMail -	\$25.00

## Preparing eReceipts for Email

We have entered all the receipts we are interested in.

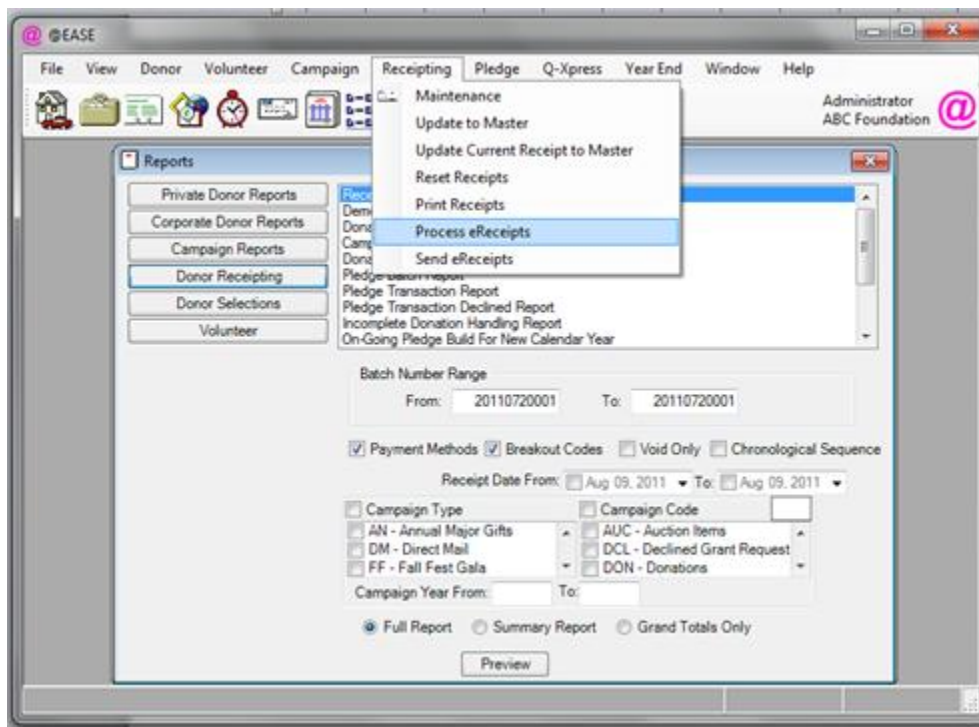
ABC Foundation Aug 9, 2011

### Receipt Batch Report by Batch Number

Batch Number from 20110720001 to 20110720001

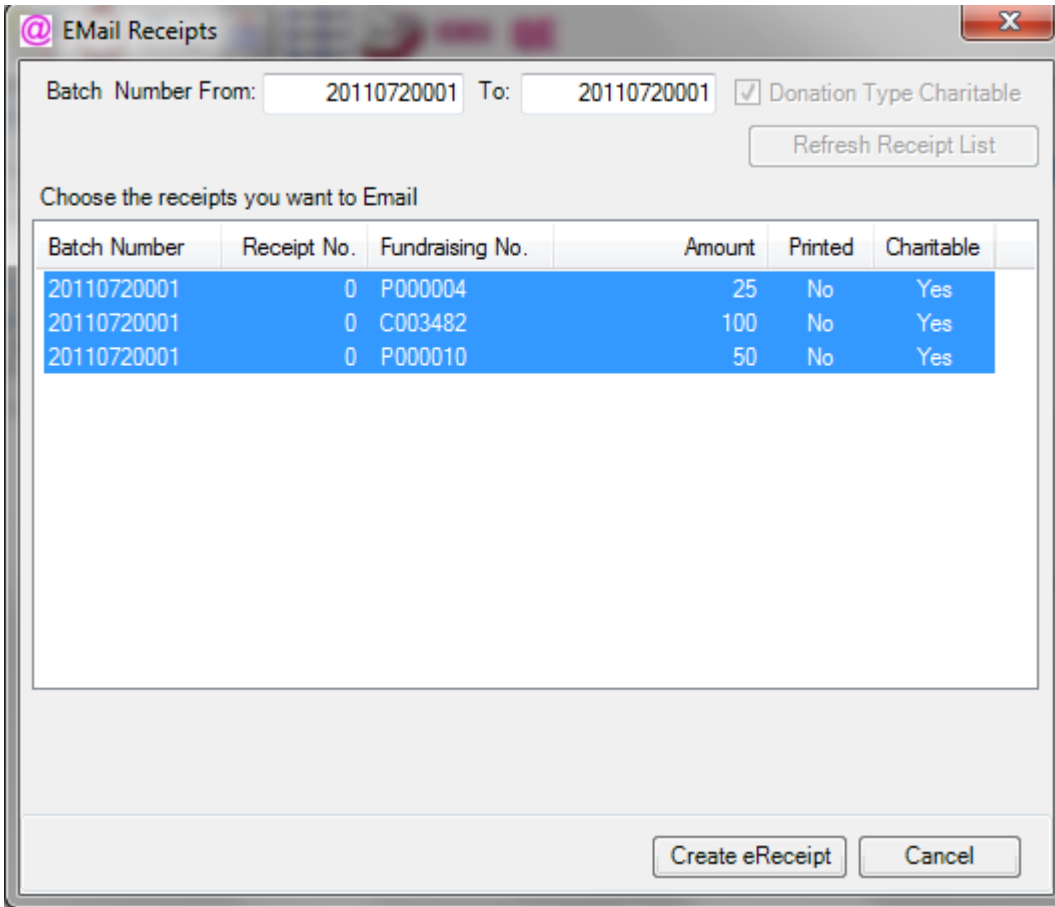
Donor	Name/Corporation	Ticket #	Date	Paid	Amount	Receipt #	Campaign	Upd	Void	Breakout Code	Amount
<b>Batch Number 20110720001</b>											
P000004	Abbott Kelly	0	Jul 20, 2011	Cheque	25.00	0	2011DMDON	N	N	DirectMal	25.00
C003482	Batsch Group Inc	0	Jul 20, 2011	Cheque	100.00	0	2011DMDON	N	N	DirectMal	100.00
P000002	George Kate	0	Jul 20, 2011	Visa	50.00	0	2009DMDON	N	N	DirectMal	50.00
P000010	Hamm John	0	Jul 20, 2011	Cheque	50.00	0	2011DMDON	N	N	DirectMal	50.00
<b>Summary Batch Number 20110720001</b>											
<b>Total Amount:</b>		225.00		<b>*Non-Charitable Amount:</b>		0.00		<b>Charitable Amount:</b>		225.00	
<b>Charitable Gifts:</b>		<b>Donations:</b>		<b>Computer Receipts:</b>		0.00		<b>Manual Receipts:</b>		0.00	
		Donation Count:		4		0		Manual Receipts:		0	
<b>Non Charitable Gifts:</b>		<b>Donations:</b>		<b>Computer Receipts:</b>		0.00		<b>Manual Receipts:</b>		0.00	
		Donation Count:		0		0		Manual Receipts:		0	
<b>Registration Amount:</b>		0.00									
<b>Payment Methods</b>											
Cheque		3		175.00		Visa		1		50.00	
<b>Breakout Codes</b>											
DirectMail 12345-00		4		225.00							
<b>Total Private Unallocated:</b>		0.00		<b>Total Corporate Unallocated:</b>		0.00					

Click on Receipting and select Process eReceipts

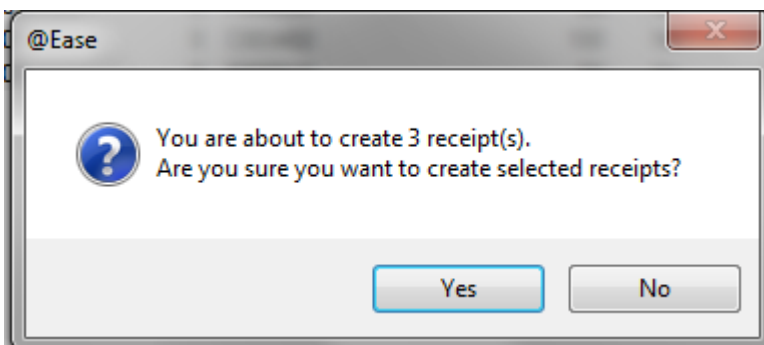


Enter the Batch Number range and click Create eReceipt at the bottom of the window.

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

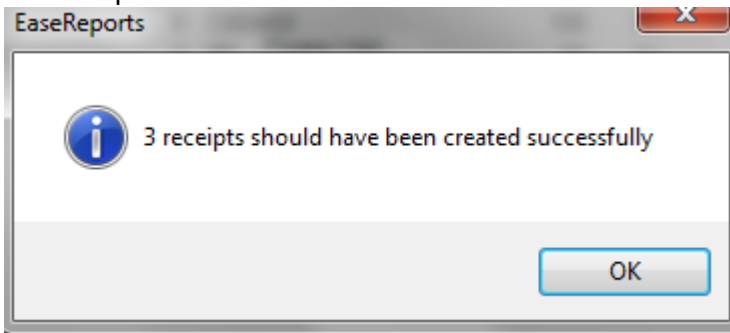


The following window appears:

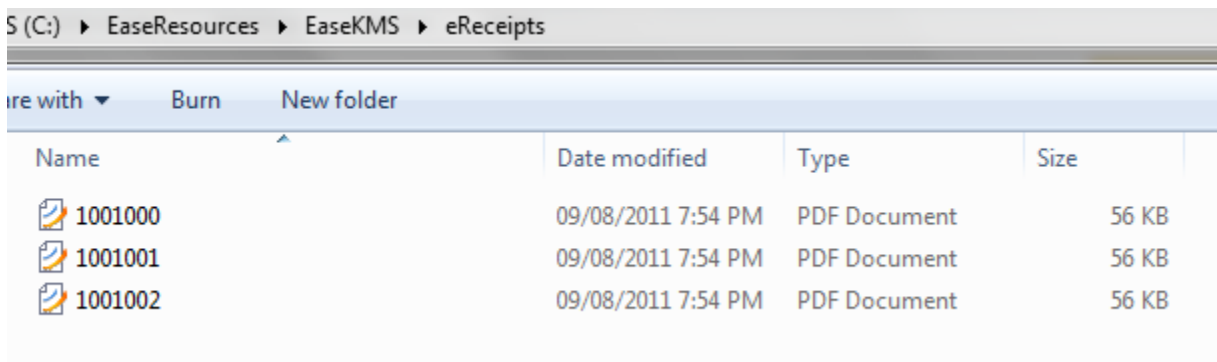


Click Yes to continue.  
Followed by:

---

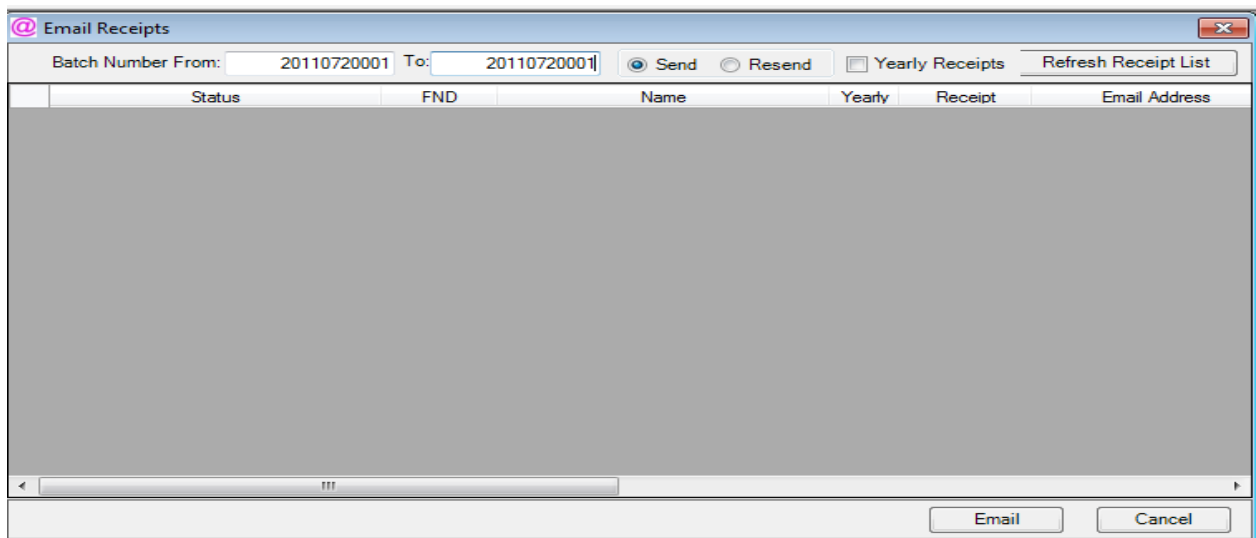


We have now created the eReceipts. If you go to your eReceipt folder you will see that they exist and if you check Organizational Defaults, you will see that the eReceipt number has incremented.



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.



Status	FND	Name	Yearly	Receipt	Email Address
	C003482	Batsch Group Inc	<input type="checkbox"/>	1001001	accounting@batschgroup.com
	P000004	Abbott, Kelly	<input type="checkbox"/>	1001000	kelly.abbott@gmail.com
Email address not found for P000010	P000010	Hamm, John	<input type="checkbox"/>	1001002	

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.

Status	FND	Name	Yearly	Receipt	Email Address
	C003482	Batsch Group Inc	<input type="checkbox"/>	1001001	accounting@batschgroup.com
	P000004	Abbott, Kelly	<input type="checkbox"/>	1001000	kelly.abbott@gmail.com
	P000010	Hamm, John	<input type="checkbox"/>	1001002	sharon@batschgroup.com

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.

@Ease

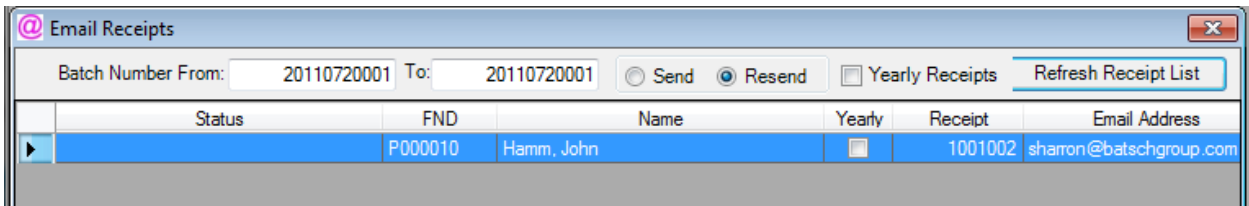
1 receipt(s) have been emailed

OK

Email Cancel

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

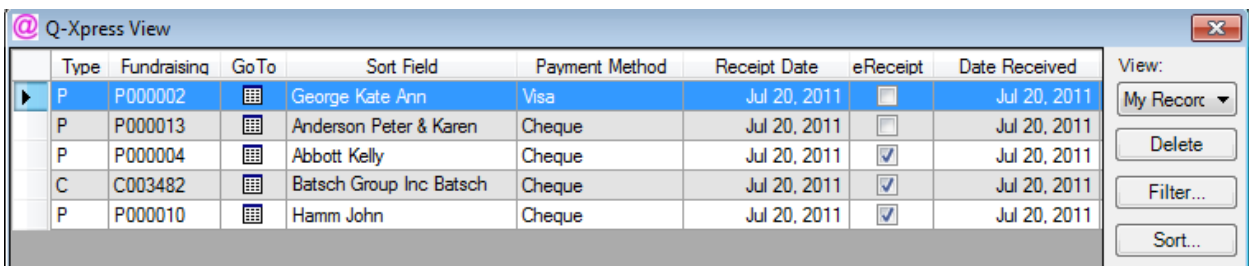
Here is a sample of Refresh Receipt List with Resend for the same batch number range.



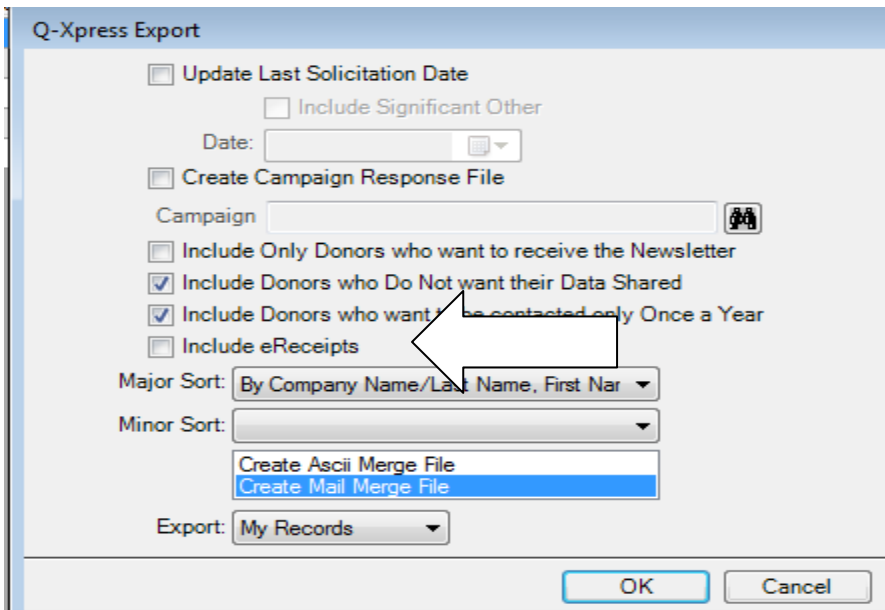
### Q-Xpress Receipting Amount Payment Method Date

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.

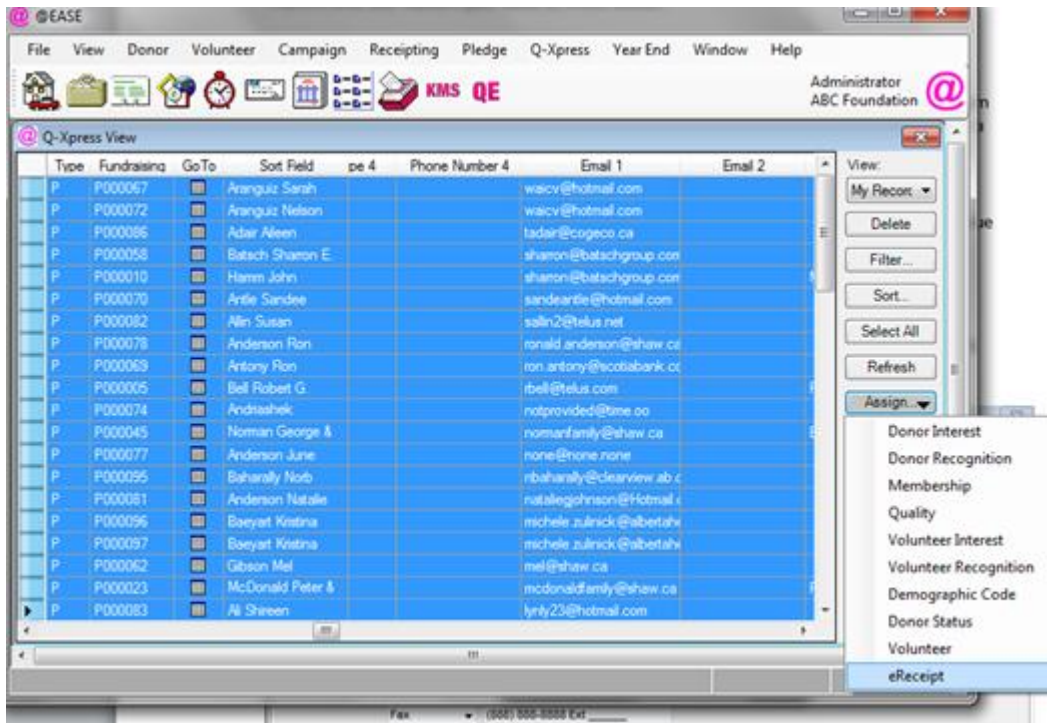


There is one last feature you need to know about.

## 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.

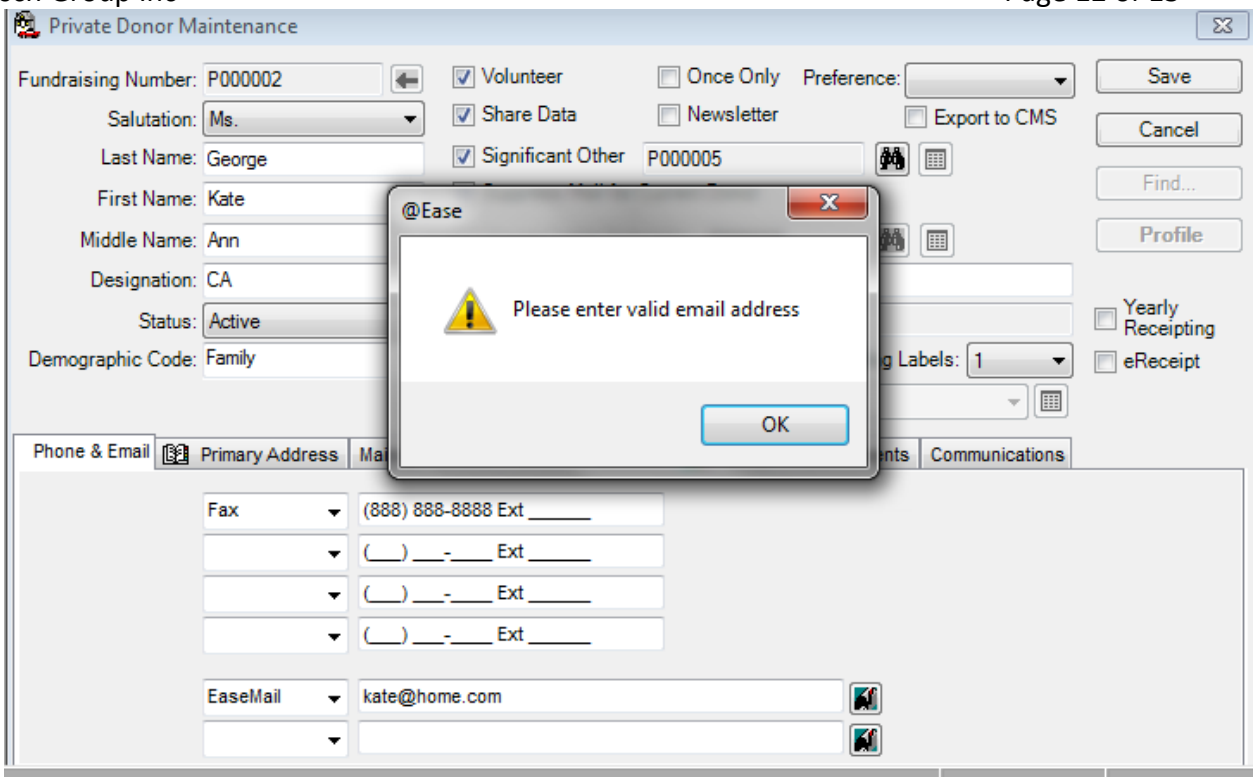
Adding eReceipt will update all unprinted receipts to enable eReceipts, removing the value with disable the eReceipt.



## 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.

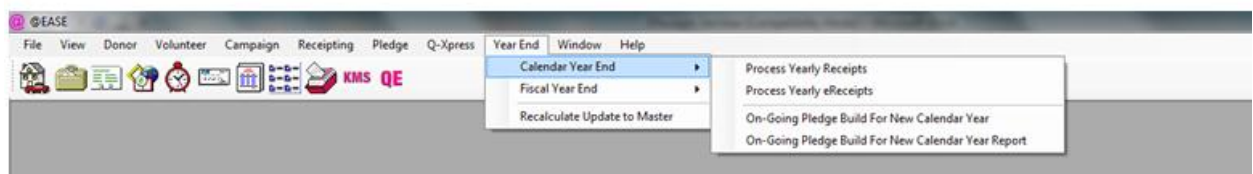
Erase or removed unwanted characters to remove the validation error message.



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

**Process Yearly eReceipts** X

---

Process Receipts

Fundraising No From:  To:  Sort by:

Campaign:

Receipt Date From: Jan 01, 2011  To: Dec 31, 2011

Donation Type Charitable

---

Processed Receipts Choose the receipts you want to Print, Post, Reset or Delete

ID	Fundraising No.	Donor Name	Campaign	Amount	Printed	Receipt No	DemographicCode

Receipt Date: Dec 31, 2011

Here is may sample email:

**Direct Mail Thank You Message and Receipt**

---

From: <sharron@batschgroup.com>  
 Subject: Direct Mail Thank You Message and Receipt  
 Sent date: 08/09/11 22:04:29  
 To: <sharron@batschgroup.com>  
 Attachments: [Receipt.pdf \[ 56 KB \]](#)

Thank you for your thoughtful donation. Gifts from the Direct Mail campaign will be used to upgrade the ABC Family Camp.

For more information about the AFC please click on the following link: <http://www.abcfoundation.org/ABCFamilyCamp>.

To follow us on Facebook click to join <http://www.facebook.com/ABCFoundation>.

or join us on Twitter to hear the latest updates.

We appreciate your support.

ABC Foundation

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

<p style="text-align: center;"><b>Official Tax Receipt</b></p> <p><b>ABC Foundation</b> 202 345 113 Street SW Edmonton AB T6N 7U8 Phone (780) 683-2100 Fax (780) 683-3000 E-mail: info@abcfoundation.org Web: www.abcfoundation.org</p> <p style="text-align: center;"><i>Official Receipt for Income Tax Purposes</i></p> <p><b>The Sum of</b> Fifty</p> <p><b>Received From</b> Mr. John Hamm CA 1420 2A Street NW Calgary AB T2M 2X4</p>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td><b>Receipt</b></td> <td style="text-align: right;">E1001002</td> </tr> <tr> <td><b>Charitable Number:</b></td> <td style="text-align: right;">9999 88888888 RC0001</td> </tr> <tr> <td><b>Date</b></td> <td style="text-align: right;">Jul 20, 2011</td> </tr> <tr> <td>P000010</td> <td style="text-align: right;">E1001002</td> </tr> <tr> <td colspan="2" style="text-align: center;">Issued at: Edmonton</td> </tr> <tr> <td><b>Dollars</b></td> <td style="text-align: right;">00/100 \$ 50.00</td> </tr> <tr> <td colspan="2" style="text-align: right;">Date Rec'd: Jul 20, 2011 Canada Revenue Agency <a href="http://www.cra-arc.gc.ca/charities">http://www.cra-arc.gc.ca/charities</a></td> </tr> </table> <p style="text-align: center;"><b>Authorized Signature</b> _____ Executive Director</p>	<b>Receipt</b>	E1001002	<b>Charitable Number:</b>	9999 88888888 RC0001	<b>Date</b>	Jul 20, 2011	P000010	E1001002	Issued at: Edmonton		<b>Dollars</b>	00/100 \$ 50.00	Date Rec'd: Jul 20, 2011 Canada Revenue Agency <a href="http://www.cra-arc.gc.ca/charities">http://www.cra-arc.gc.ca/charities</a>	
<b>Receipt</b>	E1001002														
<b>Charitable Number:</b>	9999 88888888 RC0001														
<b>Date</b>	Jul 20, 2011														
P000010	E1001002														
Issued at: Edmonton															
<b>Dollars</b>	00/100 \$ 50.00														
Date Rec'd: Jul 20, 2011 Canada Revenue Agency <a href="http://www.cra-arc.gc.ca/charities">http://www.cra-arc.gc.ca/charities</a>															