

# RECEIPTING OVERVIEW

One of the most effective ways to boost your donor retention rate is to say **thank you** in a timely manner. Your gift receipts can serve a dual purpose by providing your donors with valuable tax information while thanking them for their generosity!

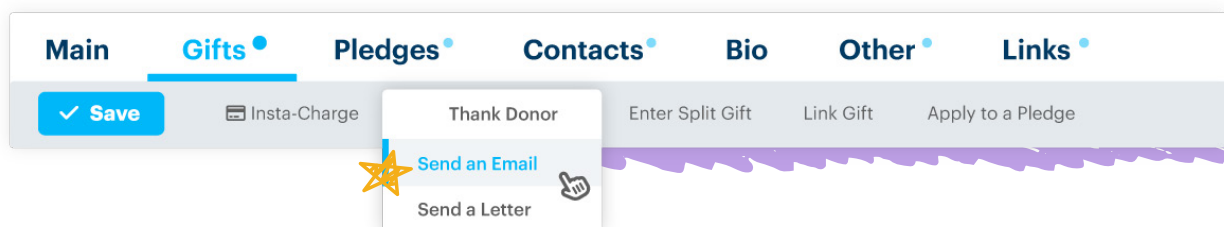
## Two Ways to Send Receipts to Donors

DonorPerfect makes it easy to retain your supporters by creating simple ways to thank them. For the quickest result, thank donors immediately as you are entering individual gifts.

When you have a lot of thank-you letters or emails to send, use DonorPerfect's Receipts module to generate hundreds and even thousands of thank-yous quickly. With both methods, you can access a library of ready-to-use email and letter templates that you can personalize to communicate the impact your donor's gift had on your cause.

## Sending Individual Receipts as You Enter Gifts

After you enter a donor's gift, select Thank Donor to instantly send an email or thank you letter to your supporter for their gift.



## Sending Individual Email Receipts

If the Donor's Receipt Delivery Preference is Email or Email and Letter, select Thank Donor > Send an Email from the donor's gift record. The email will display using the template selected during Gift entry, but you can easily select a new template or customize the existing one. Once your email is personalized, click Send. This will update your donor's receipt fields, marking the gift as processed. It will also create a contact record if you have this set in parameters.

[SEND EMAIL RECEIPTS »](#)

## Sending Individual Letter Receipts

If the Donor's Receipt Delivery Preference is Letter, select Thank Donor > Send a Letter from the donor's gift record to send a thank you letter acknowledging their gift. This will update your donor's receipt fields, marking the gift as processed. It will also create a contact record if you have this set in parameters.

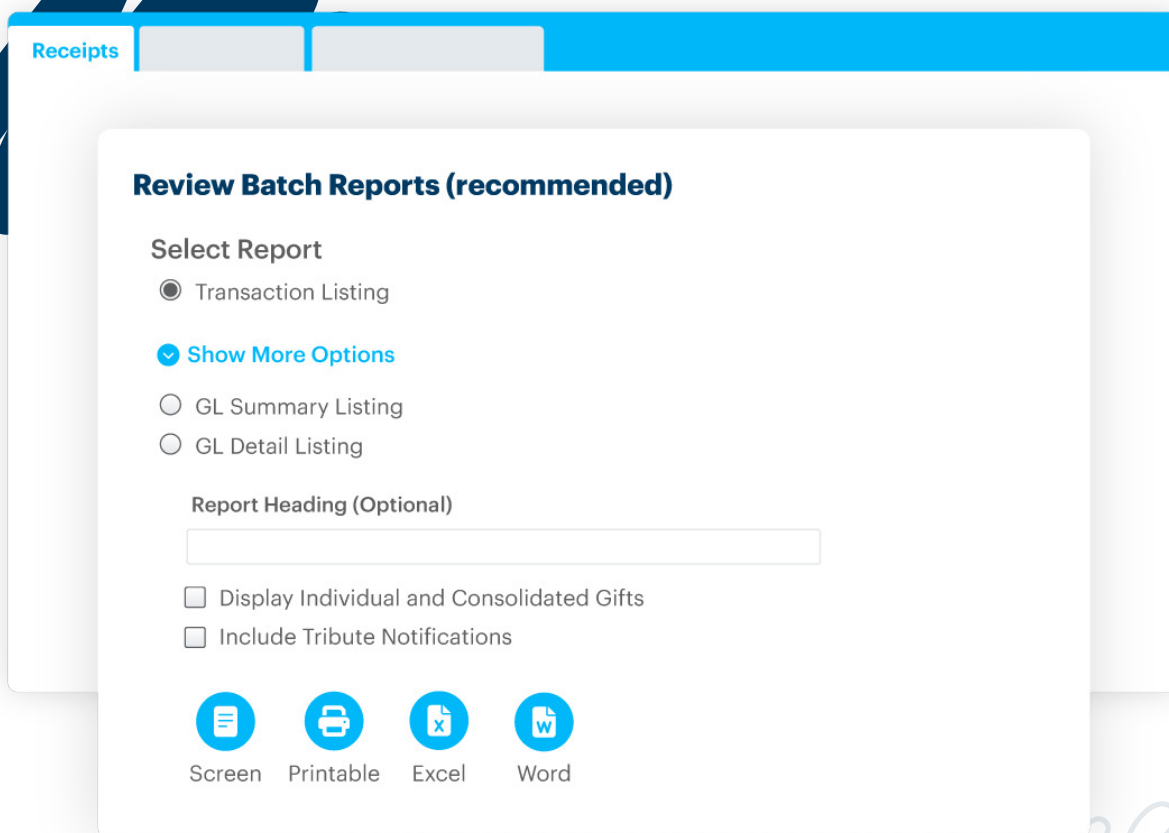
[SEND LETTER RECEIPTS »](#)

Whether you send an email or letter, your donor will know their gift is appreciated as soon as possible, and you can cross off sending donor thank yous from your list in record time.

## Sending Multiple Receipts in Batches

If your organization received a large number of donations in a short timeframe, such as during Giving Tuesday, at year-end or following an event or campaign, go to DonorPerfect's Receipts module by clicking **Receipts** on the main toolbar. The Receipts, Acknowledgements and Notifications screen will open. Here you can generate a lot of thank-you letters or emails quickly.

Receipts can be sent via email, or you can directly generate letter receipts by using the DonorPerfect [Instant Merge](#) function and Microsoft Word. Alternatively, you can create a mail merge data file to use in a mail merge with Microsoft Word to send out letter receipts.



The screenshot shows a web interface with a blue header bar containing the word "Receipts". A modal dialog box titled "Review Batch Reports (recommended)" is open. Inside the dialog, under "Select Report", there is a radio button for "Transaction Listing" (which is selected), a blue link "Show More Options" with a checkmark icon, and two unselected radio buttons for "GL Summary Listing" and "GL Detail Listing". Below this is a text input field for "Report Heading (Optional)". At the bottom of the dialog are two checkboxes: "Display Individual and Consolidated Gifts" and "Include Tribute Notifications", both of which are unselected. At the very bottom of the dialog are four circular icons with labels: "Screen" (document icon), "Printable" (printer icon), "Excel" (Excel icon), and "Word" (Word icon).

### DonorPerfect's Receipting feature enables you to:

- Send email receipts, letter receipts, or both.
- Preview every email receipt message before it is sent.
- Create contact records for sent receipts - automatically.

- Include currency symbols.
- [Generate notification letters for tribute donations](#) using the **Notifications** tab on the Receipts, Acknowledgements, and Notifications screen.
- Change your Receipting settings in the Acknowledgment and Receipt Processing Parameters screen. This can be accessed via **Parameters** in the **Settings** menu.

## Workflow

The general workflow to generate email and letter receipts is as follows:

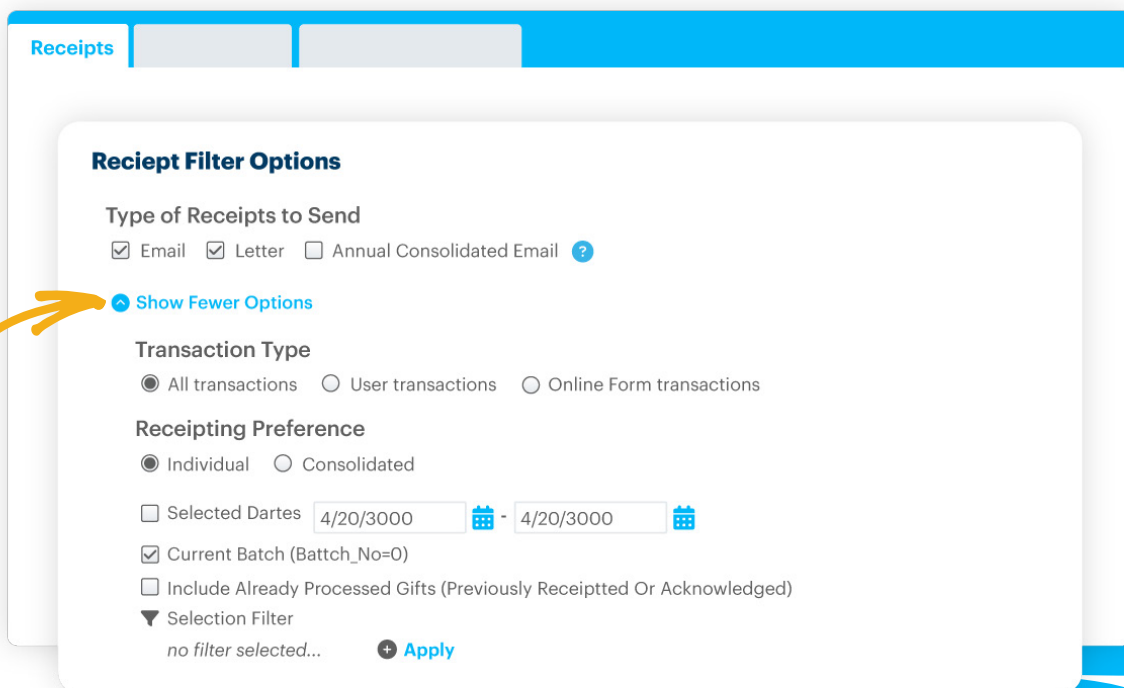
1. [Setting Receipting Parameters](#)
2. [Setting the Default Receipting Options](#)
3. [Entering Gifts and Setting Receipting Options on the Gift screen](#)
4. [Reviewing Transactions Prior to Generating Receipts](#)
5. Generating Email and Letter Receipts
  - [Sending Email Receipts](#)
  - [Using Instant Merge For Letter Receipts](#)
  - [Generating Letter Receipts with Receipting](#)
  - [Generating Email and Letter Receipts at the Same Time](#)
6. [Updating the Batch Number](#)

In addition, you can also [reissue receipts](#) if they are lost or damaged.

## Displaying Advanced Options

To simplify the receipting user interface, some of the advanced receipting options are hidden by default. They can be displayed by clicking on the Show More Options link on the Receipting screen:

### Receipting screen with Advanced Options Displayed:



The screenshot shows the 'Receipts' tab in the DonorPerfect interface. A modal window titled 'Receipt Filter Options' is open, displaying various settings. A yellow arrow points to the 'Show Fewer Options' link, which is located below the 'Type of Receipts to Send' section. The 'Receipt Filter Options' modal includes the following sections:

- Receipt Filter Options**
- Type of Receipts to Send**
  - ☒ Email
  - ☒ Letter
  - ☐ Annual Consolidated Email
- Show Fewer Options** (link)
- Transaction Type**
  - ☒ All transactions
  - ☐ User transactions
  - ☐ Online Form transactions
- Receipting Preference**
  - ☒ Individual
  - ☐ Consolidated
- Selected Dates** (4/20/3000 - 4/20/3000)
- ☒ Current Batch (Batch\_No=0)
- ☐ Include Already Processed Gifts (Previously Receipted Or Acknowledged)
- Selection Filter**
  - no filter selected...
  - Apply** (button)

## Alerts

You can quickly and easily set up alerts for pending email receipts and thank you letters. See [DonorPerfect Alerts](#) to learn more.