

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!

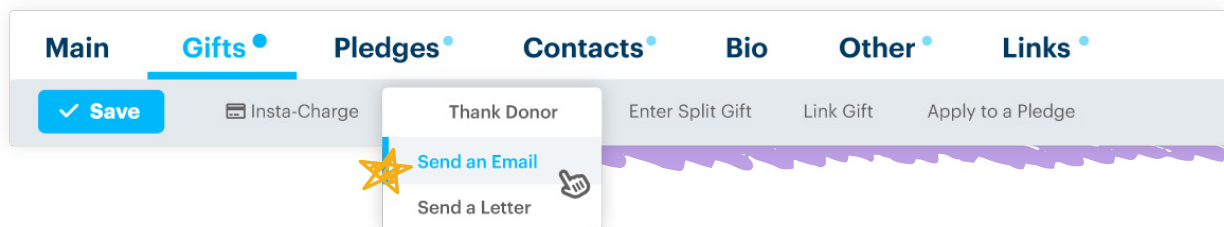
Two Ways to Send Receipts to Donors

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.

Receipts

Review Batch Reports (recommended)

Select Report

Transaction Listing

[Show More Options](#)

GL Summary Listing

GL Detail Listing

Report Heading (Optional)

Display Individual and Consolidated Gifts

Include Tribute Notifications

Screen Printable Excel Word

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:

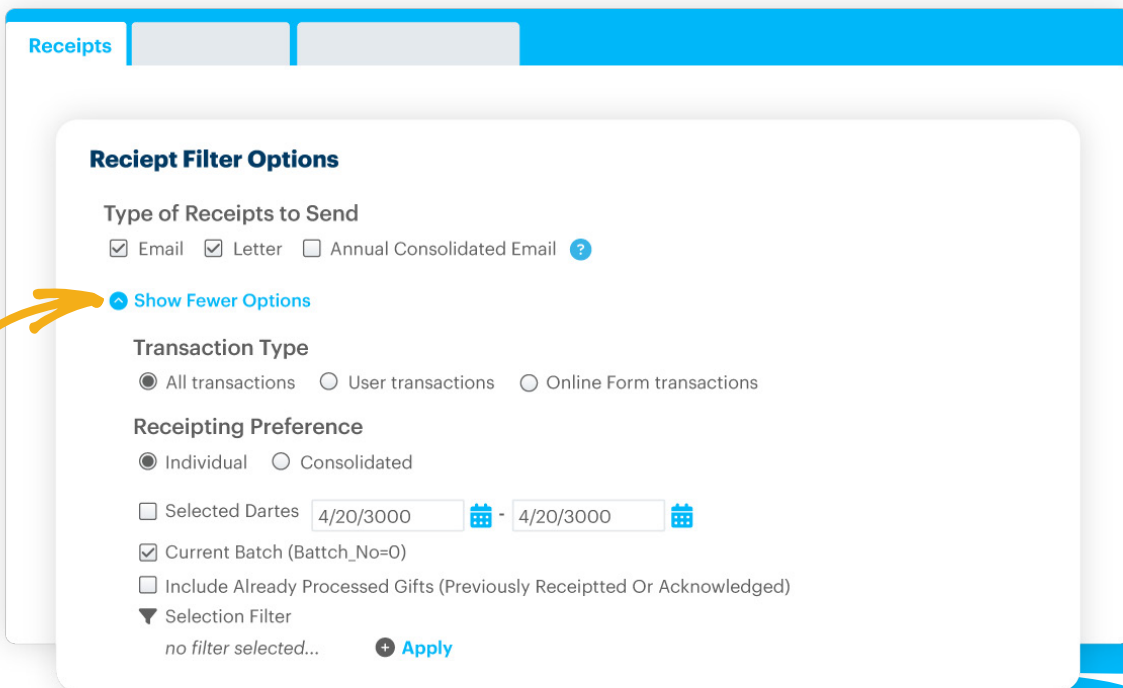
1. [Setting Receipting Parameters](#)
2. [Setting the Default Receipting Options](#)
3. [Entering Gifts and Setting Receipting Options on the Gift screen](#)
4. [Reviewing Transactions Prior to Generating Receipts](#)
5. Generating Email and Letter Receipts
 - [Sending Email Receipts](#)
 - [Using Instant 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 a web interface for receipting. At the top, there is a blue header with the word "Receipts" in white. Below the header, a white modal window titled "Receipt Filter Options" is displayed. The modal contains several sections of settings:

- Type of Receipts to Send:** Three checkboxes are visible: "Email" (checked), "Letter" (checked), and "Annual Consolidated Email" (unchecked). A small blue question mark icon is next to the last option.
- Show Fewer Options:** A blue link with a downward arrow icon, highlighted by a yellow hand-drawn arrow.
- Transaction Type:** Three radio buttons: "All transactions" (selected), "User transactions", and "Online Form transactions".
- Receipting Preference:** Two radio buttons: "Individual" (selected) and "Consolidated".
- Selected Dates:** Two date pickers, both showing "4/20/3000".
- Current Batch (Batch_No=0):** A checked checkbox.
- Include Already Processed Gifts (Previously Receipttted Or Acknowledged):** An unchecked checkbox.
- Selection Filter:** A dropdown menu showing "no filter selected..." and a blue "+ 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.