

Email Donation Receipts

<i>Speech</i>	<i>Cursor Actions</i>
Sumac can generate encrypted, government compliant electronic tax receipts that can be sent to donors. This can help reduce your organizational costs as you do not need to print and mail as many tax receipts.	
Before you can email your receipts, your Sumac Administrator needs to configure Sumac to send email.	
<p>Creating receipts works just like a mail merge, and requires the use of a template. You can generate receipts using any kind of document template – docx, rtf, or pdf – and send them as electronic receipts. Some government regulations require that electronic receipts be unchangeable, and these can only be created with a pdf template.</p> <p>You can use a variety of programs, like Adobe Acrobat tools or Libre Office, to create a pdf template. There is a sample PDF template available on the Sumac website, which you can customize for your organization. I have downloaded the template from the Sumac website, and will use it for these receipts.</p> <p>Remember, when using a template, test it first to make sure that everything works properly.</p>	Show slide.
Once you have your template ready to go, generate your receipts.	Show console.
In your Donations list, search for the donations you want to create receipts for.	Click to expand Fundraising. Click on Donations. Choose “Receipt Status” from Search Type drop-down menu. Point to “Unreceipted.” Click Search.
Expand Mailing, and click Make Receipts.	Expand Mailing. Click Make Receipts.
Choose which donations you want to create receipts for. For example, you may want to exclude any annual donation receipts, or donations that were created from a pledge, as it may not be the appropriate time of year to make annual receipts, or you use a different template for donations that relate to a pledge.	Click OK. Choose the box for “not annual receipts” and “not created from a pledge.”
Click OK.	Click OK.
Sumac asks you to enter the next donation receipt number. When Sumac suggests the receipt number to use, it looks at all the receipt numbers recorded in your database, and suggests the next highest number to use for this batch of receipts. This helps ensure that the receipt numbers in your database are sequential.	Point to suggested receipt number.

Click OK.	Click OK.
Sumac asks you which template you want to use for these receipts. Select your PDF receipt template. Click Open.	Choose PDF template. Click Open.
And Sumac knows to create...	Click OK.
69 output files, one for each merged document. Since we're using a PDF template, Sumac realizes that we'll need to save multiple files for emailing these receipts.	Expand Multiple Files area. Point to each option. Collapse Multiple Files area.
You can choose to create an encrypted PDF output document, which creates unchangeable tax receipts.	Expand PDF Encryption Point to first option.
Alternatively, you can choose not to encrypt the output document, in case you plan to edit the PDF documents later on. Because we are emailing tax receipts, they must be unchangeable to satisfy government requirements for electronic receipting.	Point to second option. Choose "Encrypt the PDF option."
Click OK, and Sumac asks you to choose a folder to hold the merged documents. Save these receipts in a designated email tax receipts folder on your computer.	Click OK.
If you have not already created a folder for these receipts, you can create a new folder.	Create New Folder: name: Email Receipts 2013-05-10.
Choose the folder to hold your PDF receipts...	Click Choose.
and Sumac saves each receipt in the appropriate folder. It also asks if you want to save a communication record to indicate that you made receipts for these contacts. Since we still have to email the receipts to the donors, click No for now, and we can save the communication records when we actually email the receipts.	Click No.
Click Email Receipts.	Click Email Receipts.
Sumac asks you to choose the folder that holds the receipts you want to email. Select the appropriate folder, and click Choose.	Select folder. Click Choose.
Sumac shows you a list of all the receipts in that folder, along with the appropriate donor contact for each receipt, and the donor's email address.	Show Email Receipts window. Point to each column.
You have the option to filter out those who have a particular communication type. For example, if you know that you have donors who prefer print receipts, create a communication type "Prefers Print Receipts" using Look Up Lists. Then, you can exclude this group by clicking Filter & Select.	Point to Filter & Select.
Click Send Emails, and Sumac asks you to confirm that you want to send the receipts to these contacts.	Click Send Emails. Click Yes.

<p>At this point, the process becomes the same as sending any email through Sumac. Enter the appropriate sending information and subject line. Choose what you want in the body of the email. You can either quick compose some information into the email, or you may have a customized template to use when emailing tax receipts. The body of this email should indicate that you are emailing the recipient a tax receipt, which is included as an attachment to this email. Sumac automatically attaches the appropriate PDF receipt to each contact's email.</p>	<p>Fill out information in Send Email window.</p>
<p>I've created a thank you letter template to use when emailing donation receipts, so I'll choose that template for this email.</p>	<p>Select thank you letter template.</p>
<p>Review the Batch Scheduling for this email. The default settings in the Batch Scheduling area are usually fine. However, if you are sending a lot of receipts, you may need to adjust this information to conform with your SMTP server's restrictions for sending bulk email.</p>	<p>Point to Batch Scheduling.</p>
<p>Click Send, and Sumac asks if you want to save a communication record for the contacts you're emailing.</p>	<p>Click Send.</p>
<p>Since we're sending a thank you letter as well as a receipt, it's a good idea to take advantage of this feature.</p>	<p>Point to Choose Communication Type: Thank you letter.</p>
<p>so I can immediately record that these contacts have been receipted and thanked for their donations.</p>	<p>Click Yes.</p>
<p>Sumac tells you how long it will take to send the emails,</p>	<p>Click Yes.</p>
<p>and asks where you want to save a status report for this email. Status reports tell you the status of each email you sent, whether it sent successfully, and if not, why it failed.</p>	<p>Choose Desktop. Click Save.</p>
<p>When the emails are sending, a progress window opens in the bottom right corner of the screen. You can continue to use Sumac while the email is being sent. However, do not close this window as it causes the sending of emails to stop immediately.</p>	<p>Point to progress window.</p>
<p>You've just learned how to easily send out encrypted, government compliant email tax receipts to your donors. This helps ensure that your tax receipts are accurate and timely, and helps you reduce the cost of printing, mailing, and staff hours.</p>	
<p><i>Check out more training videos to learn more about Sumac.</i></p>	