TheRaiser'sEdge®
Enterprise™

Receipting Guidelines for Canada

Receipting Guidelines for Canada

Contents

What Is In This Guide?

In the *Receipting Guidelines for Canada*, you learn the process to eliminate duplicate receipts and the various areas of ***The Raiser's Edge Enterprise*** it affects. This book also contains guidelines for proper receipting. In addition, you learn how to use Multiple Receipt Stacks. This guide includes the following.

- "Basic Receipting Requirements for the Canada Revenue Agency" on page 3
- "Suggestions for Receipts" on page 5
- "Reprinting Receipts from Gift Records" on page 18
- "Receipting Using Multiple Receipt Stacks" on page 35
- "Reprinting Consolidated Receipts" on page 44
- "Entering Receipt Stack Information on Receipts in Mail" on page 44

How Do I Use These Guides?

The Raiser's Edge Enterprise user guides contain examples, scenarios, procedures, graphics, and conceptual information. Side margins contain notes, tips, warnings, and space for you to write your own notes.

To find help quickly and easily, you can access the ***Raiser's Edge*** documentation from several places.

User Guides. You can access PDF versions of the guides by selecting **Help**, **User Guides** from the shell menu bar or by clicking **Help** on the Raiser's Edge bar in the program. You can also access the guides on our Web site at www.blackbaud.com. From the menu bar, select **Support**, **User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, you can learn about ***The Raiser's Edge*** by accessing the help file in the program. Select **Help**, **The Raiser's Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter "Load Defaults". The help file searches for the complete phrase in quotes instead of individual words.

Icons

The following icons are used in the side margins to denote additional information such as notes, warnings, time-savers, or definitions. You can also use these margins to write your own notes.

Welcome

The notepad symbol designates a note or tip related to the information in the main text column.

The traffic light indicates a cautionary note. Generally, we use this icon to point out a step that may have unwanted results.

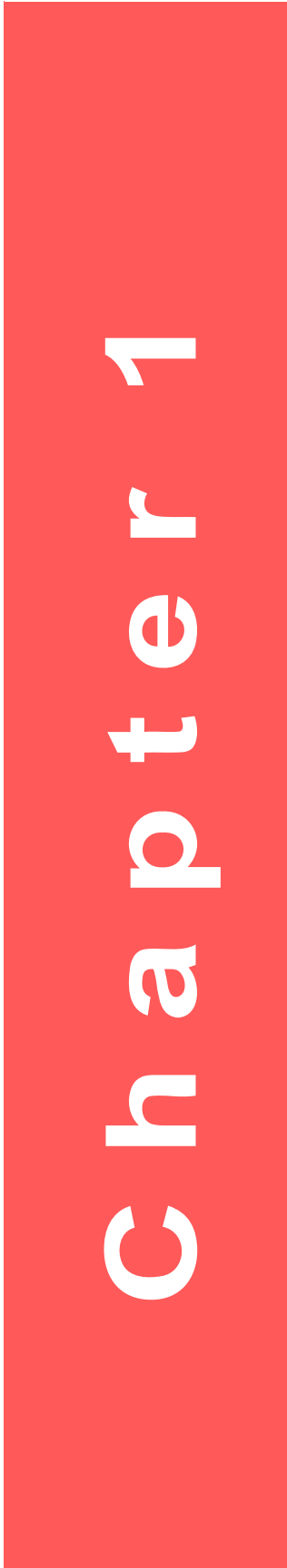The clock symbol designates a shortcut or timesaving action.

The dictionary symbol designates the definition of a frequently used term.

Introduction

Contents

Chapter 1

Changes made to the reprinting receipts process in *The Raiser's Edge* appear in versions 7.02 and higher. The ability to track multiple receipt stacks appears in versions 7.5 and higher.

This guide outlines the processes you must perform to avoid duplicate receipts and efficiently track historic receipt printing information for your organisation. Procedures in this guide outline how to reissue or reprint receipts, within the guidelines established by the Canada Revenue Agency (CRA) for nonprofit organizations and charities. This guide also describes how to use multiple receipt stacks.

We recommend all users read this Introduction chapter and the Receipting & Reprinting Receipts chapter. If you are receipting various ways or for multiple databases or offices, you also need to read the Receipting Using Multiple Receipt Stacks chapter. Use this guide as a supplement to the *Mail Guide*. For general information about using the Receipts mail task in *The Raiser's Edge Enterprise*, see the *Mail Guide*.

Highlights

When you generate and reprint receipts in *The Raiser's Edge*, keep these points in mind:

- The next available receipt number is stored in *Configuration*. If you use multiple receipt stacks, the next available receipt number for each receipt stack is stored in *Configuration*.

- When you save a gift record or Receipts parameter file in *Mail*, or commit a Gift batch in which you entered receipt numbers, the program checks to see if the receipt number used is already in use on another gift record. The program also verifies the number you use is greater than the next available receipt number. This process ensures you do not unknowingly reuse receipt numbers or unintentionally skip receipt numbers.

- Receipt reprint history information is automatically stored on the Receipt History screen. To access this history, click the **Receipt** button on the Gift tab of the gift record.

- To ensure correct receipting, once the Receipts mail task begins to run, other users are locked from doing the same from other workstations.

- In **Import**, you can specify whether the program should import all gifts, regardless of receipt number; not import gifts with a duplicate receipt number for gifts from a different donor; or not import gifts with a duplicate receipt number from any donor.

- When you commit a Gift batch, the program checks to see if receipt numbers used in the batch are already in use on existing gift records. If duplicate receipt numbers are found in *Batch*, you can choose on the Commit screen what to do with them.

- Receipt numbers cannot be set through the Gift Default set, accessed through **Tools**, **Organize/Create Defaults** on the shell of *The Raiser's Edge*.

- You can receipt using multiple receipt stacks. However, you should track receipt stack information consistently one of two ways, either on the gift record or in Receipts in *Mail*.

- Using the eReceipts tab, you can configure and send gift receipts by email. Electronic receipts can help reduce the amount of paper and time used to return printed receipts to your donors.

Historic data may still contain duplicate receipt numbers. Versions 7.02 and higher do not automatically check past data entry of receipts. However, you can use the **Duplicate Receipts** process in *Administration* to run a report against the database to determine possible duplicate receipt numbers. For more information about this process, see "Duplicate Receipt Report" on page 28.

To send electronic receipts to constituents, you must have *NetSolutions* or **Blackbaud NetCommunity**. When you have *NetSolutions* or **Blackbaud NetCommunity**, an eReceipts tab appears on the Receipts mail task when you select Create custom data file in the **Receipt type** field on the General tab. For information about using eReceipts, see the eReceipts Tab chapter of the *Mail Guide*.

Basic Receipting Requirements for the Canada Revenue Agency

According to the Canada Revenue Agency (CRA), nonprofits and charities must include the following on receipts they use for gifts they receive:

- The name "Canada Revenue Agency" and their Web site address (www.cra-arc.gc.ca/charities).

- A statement that it is an official receipt for income tax purposes.

- Your charity's business number (BN)/registration number, name, and address in Canada, as recorded with the Canada Revenue Agency (CRA) Charities Division.

- The serial number of the receipt.

- The place or locality where the receipt was issued.

- If it was a cash gift, the day or year during which your organisation receives the donation.

- If it was a gift-in-kind, the exact date on which the donation was received; a brief description of the gift; and, if an appraisal was completed, the name and address of the appraiser of the property.

- The day on which the charity issued the receipt, if that day differs from the date on which the charity received the donation.

- The name and address of the donor including, in the case of an individual, the first name and middle initial.

- If it was a cash gift, the amount of the cash donation.

- If it was a gift-in-kind, the amount of the fair market value of the gift at the time of the donation.

- The signature of the individual(s) authorized by the charity to issue receipts.

- For a lost or spoiled receipt, your organisation must issue a replacement. The replacement receipt must contain all the required information as mentioned above, plus a note stating that it cancels and replaces the original receipt and the serial number of the original receipt. Your organisation must retain its copy of the original receipt, which must be marked "cancelled".

For more information, we recommend you read CRA publication IT110R3 *Gifts and Official Donation Receipts*, located under http://www.cra-arc.gc.ca/tax/charities/publications_list-e.html (for English) or http://www.cra-arc.gc.ca/tax/charities/publications_list-f.html (for French).

Charity/Nonprofit information, such as name and address, does not print from *The Raiser's Edge*. It is the responsibility of the nonprofit or charity to include it on the receipt.

While it is recommended that property valued over $1000 be appraised, there is no legal requirement to do so. If property has been appraised, you must provide the name and address of the appraiser on the receipt.

Receipts can have a facsimile signature if the receipt is serially numbered and the signature is imprinted distinctly, such as by a commercial printer, with the name, address, and BN/registration number of the charity.

Frequently Used Terms

To effectively use receipts as part of your organization's fundraising efforts, you should have a basic understanding of common terms. If you find an unfamiliar term when you read this or any guide in *The Raiser's Edge* user guides, search the online glossary in the help file.

Consolidated receipt. A consolidated receipt is one receipt generated for several gifts. For example, a donor gives $50 a month for 12 months. The donor does not want a receipt each month, but instead wants one at the end of the year for the full amount of $600. In this case, a consolidated receipt can be generated and all 12 gifts have the same receipt number. For consolidated receipts, you must print a message that includes the date range in which the receipts were given. CRA requires a date be printed, but one does not automatically print for consolidated receipts.

Multiple receipt stacks. If you receipt various ways, such as with preprinted paper receipts and email receipts, or you receipt for multiple databases or offices, you are using multiple receipt stacks. If you use multiple receipts stacks, follow the guidelines in "Receipting Using Multiple Receipt Stacks" on page 35. See also the entry for **"Receipt stack" on page 4**.

Next available receipt number. This number is updated when the receipt number is automatically added to the gift record through *Mail*, *Batch*, or **Import**, or when the receipt number is manually entered and saved on the gift record. It is stored in the **Business Rules**, **Gift options** section of *Configuration* and appears in the **Start receipt no.** field on the General tab when you open a Receipts mail task in *Mail*. If you use multiple receipt stacks, the next available receipt number for each receipt stack is stored in *Configuration*. You can manually adjust this number in *Configuration*. However, you can never enter a number lower than the stored next available receipt number.

Printed Receipt Number. The **Printed Receipt Number** is created by combining **Receipt Stack ID** (taken from the **Receipt Stacks** code table in *Configuration*) and the **Receipt number** (**Receipt no.** field on the gift record). If you track multiple receipt stacks, the **Printed Receipt Number** is used to check for duplicates, instead of just the **Receipt number**.

Receipt history information. A receipt history is information about previously issued or reissued receipts. If a receipt is reissued for a gift at least once, receipt history information exists. To access the Receipt History screen, click the **Receipts** button on the Gift tab of the gift record.

Receipt stack. A receipt stack is the numbered and ordered stack of receipts used to receipt donations to your organization. A receipt stack can refer to printed paper receipts or email receipts. If you receipt only one way, with only one receipt stack, follow the guidelines in "Receipting and Reprinting Receipts" on page 7. See also the entry for **"Multiple receipt stacks" on page 4**.

Reissue receipt. "Reissue receipt" indicates that the receipt has been issued multiple times. Generally, "reissue" means to reprint receipts, but it denotes that the donor has received the original receipt. For example, if a donor loses a receipt and requests another, you can reissue the receipt. Normally, reissued receipts have a different receipt number and must contain a message that it

replaces the original receipt. In *The Raiser's Edge*, no distinction is made between a Reprint and Reissue Receipts process. To reissue a receipt, use the Reprint process from a gift record. To reissue or reprint receipts, select **Gift**, **Reprint Receipt** from the menu bar on a gift record. On the Reprint Receipt screen that appears, you can further define whether it is a reprint or reissue. See also the entry for "Reprint receipt" on page 5.

Reprint receipt. "Reprint receipt" is sometimes interchangeable with "reissue receipt". Sometimes it is necessary to reprint a receipt, either one that has already been issued to the donor, or before it ever leaves your office. When you reprint a receipt, use the same or a different receipt number, depending on whether the donor has already received the receipt and whether you use preprinted receipts. For example, if you made an error on the original receipt, you can reprint another with the correct information. If the donor has not yet received the original receipt, it is not necessary to include a message to indicate that it is a replacement receipt, though it is possible. *The Raiser's Edge* and user guides use this phrase to refer to both "reprinting" and "reissuing" receipts. For information about when and where in the program to reprint receipts for various reasons, see the procedures in this guide. See also the entry for "Reissue receipt" on page 4.

Spoiled receipt. A spoiled receipt contains receipt or gift information that was incorrectly or illegibly entered, as defined by the Income Tax Interpretation Bulletin issued by Canada Revenue Agency (CRA). A spoiled receipt requires you to reprint the receipt.

Issues with Conversions

Receipting changes for Canada appear in *The Raiser's Edge* versions *7.02* and higher.

If you convert from *The Raiser's Edge* versions *6.x*, *7.0*, or *7.01* to version *7.02* or higher, the program checks for the highest receipt number used and adds one for the next available receipt number in *Configuration*. For example, if the highest receipt number in your database before the conversion is 1524, the next available receipt number stored in *Configuration* will be 1525.

As part of post-conversion clean-up, you can go into *Configuration* and manually adjust the next available receipt number if, for example, you use preprinted receipts and the number on the receipt is higher than the next available receipt number.

When you convert to versions *7.02* or higher, the program does not check historic data for duplicate receipts. The program still allows for consolidated receipts, so duplicate receipt numbers may appear for this reason.
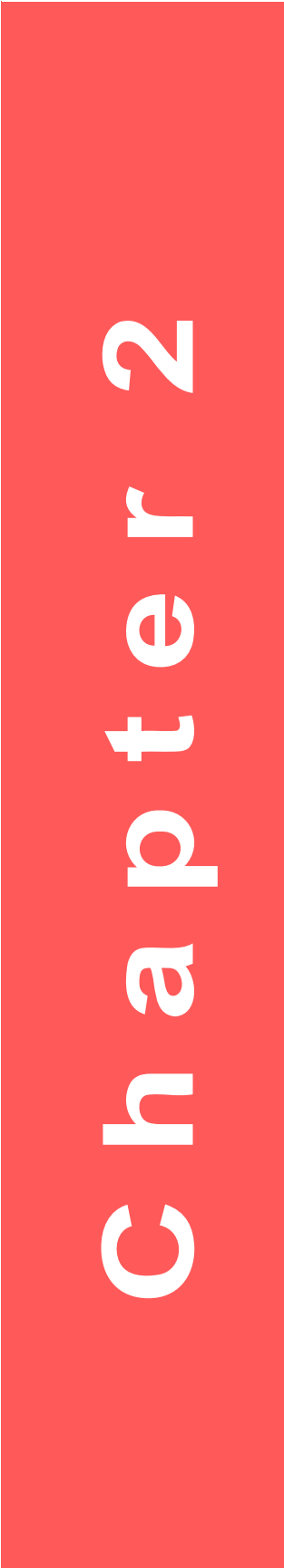
Multiple Receipt Stack changes appear in versions *7.5* and higher. For more information about multiple receipt stacks, see "Receipting Using Multiple Receipt Stacks" on page 35.

Suggestions for Receipts

To use *The Raiser's Edge* to properly print receipts, we recommend these guidelines:

• Do not change receipt numbers on gifts while another user prints receipts. This applies to **Import**, *Batch*, and *Records*.

• Limit access to the Receipts mail task through **Security**.

- When you upgrade from versions *6.x*, *7.0*, or *7.01* to versions *7.02* or higher, the program runs through all gift reords to check the next available receipt number and determine the highest receipt number in use, which is then used to store the next available receipt number.

- As part of post-conversion clean-up, run the new **Duplicate Receipts** process in *Administration*.

- To avoid reuse of the same receipt number, the CRA tax bulletin states that it prefers the receipt numbers be preprinted on the receipts.

- After you print receipts in *Mail*, print a Receipt Report to keep for your records, in case a question is ever raised.

- For consistency and to ensure an appropriate message is always used, we recommend you develop and have all *Raiser's Edge* users in your office use a standard message entered on the Reprint Receipt screen. This message appears on reprinted or reissued receipts and explains that the new receipt replaces the original receipt. To access the Reprint Receipt screen select **Gift**, **Reprint Receipt** from the menu bar on a gift record. For more information, see "Reprint Receipt Screen" on page 19.

- When you print consolidated receipts, add a message to the receipt that includes the date range for which the gifts were given. For example, "This is an official receipt for gifts donated between 06/30/2007 and 07/01/2008". CRA requires a date be printed on the receipt. However, one does not automatically print for consolidated receipts. You can enter the message on the Format tab in *Mail* or on the Reprint Receipt screen. Any message entered on the Reprint Receipt screen overwrites one entered on the Format tab.

- To avoid complications in receipts, do not vary the way you record receipt stack information. Choose one way and stay consistent.When you use multiple receipt stacks, we strongly recommend you consistently record receipt stack information one of two ways:

  - When you enter a gift, consistently enter the receipt stack on the gift record.

  - Consistently use the Receipts mail task in *Mail* to assign the receipt stack.

  For a definition of multiple receipt stacks, see "Frequently Used Terms" on page 4.

- If you do not use multiple receipt stacks, do not enter information in the **Receipt Stacks** code table or use the **Receipt Stack** fields on gift records and in *Mail*.

Receipting and Reprinting Receipts

Chapter 2

Contents

Procedures

Printing Receipts in Mail

The receipting functions described in this chapter are available in **The Raiser's Edge** versions **7.02** and higher. Functions for receipting using multiple Receipt stacks, as described in the following chapter, are available in versions **7.5** and higher.

To ensure proper receipting, when you begin to run the Receipts mail task in *Mail*, no other users can process receipts at their workstations. However, while the mail task runs, other users can create new parameter files for receipts, open existing receipts, or reprint receipts from a gift record.

If you attempt to run the Receipts mail task while receipts are already printing from *Mail* on another workstation, a message appears. To return to the previous screen, click **OK**.
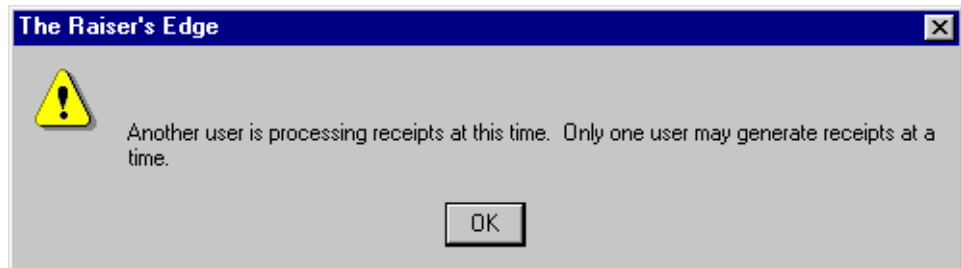
If you start the receipt run with a number other than the next available receipt number, *Mail* provides helpful messages. You cannot start the run with a value less than the next available receipt number. If the value is greater than the next available receipt number, you receive a warning that numbers will be skipped. Additionally, a message appears to ask if all receipts printed correctly before the message to mark all gifts as receipted.

New Receipt Parameter Files

When you open a new Receipts mail task to create a new parameter file, the **Start receipt no.** field on the General tab displays the next available receipt number, as stored in *Configuration*.

You cannot enter a value in the **Start receipt no.** field that is less than the default number from *Configuration*. For example, when you open a new Receipts parameter file, the number that appears in the **Start receipt no.** field on the General tab is "5152001". You cannot enter any number lower than that. If you do, when you click **Save**, **Print**, **Preview**, or **Layout**, a message appears to inform you that the receipt number cannot be less than the next available receipt number.
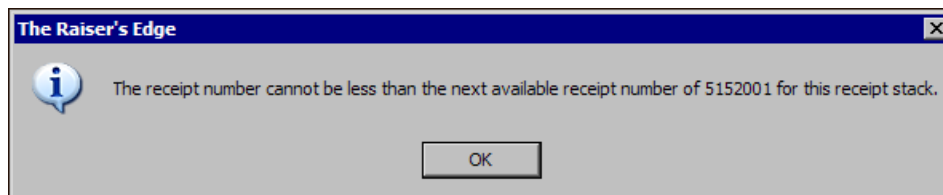
If you are receipting using multiple receipt stacks, such as printed receipts and email receipts, or receipting for multiple databases, additional fields appear on the General tab of the New Receipts screen. If you are using multiple receipt stacks, follow the guidelines described in "Receipting Using Multiple Receipt Stacks" on page 35.

If you change the receipt number in the **Start receipt no.** field to a number higher than what is the stored next available receipt number, when you click **Save**, **Print**, **Preview**, or **Layout**, a message appears to inform you that receipt numbers will be skipped.

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The next available receipt number for this receipt stack is 5152001. The number you have entered will result in receipt numbers being skipped. Would you like to continue and skip the receipt numbers?

Yes   No
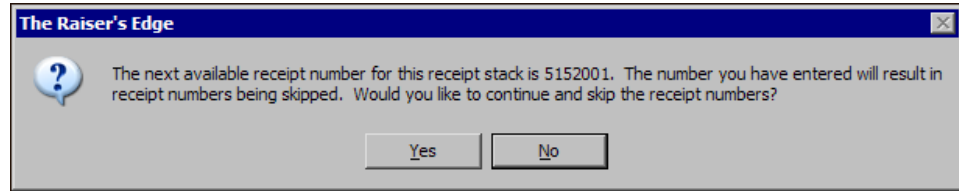
Opening Existing Parameter Files

When you open an existing Receipts parameter file, the value in the **Start receipt no.** field is either the value from the last time the parameter file was used or the next available receipt number, whichever is higher.

Previewing Receipts

Please note these points about what happens when you preview receipts rather than print them:

- When you preview receipts, a message does not appear to ask if all receipts printed correctly.

- When you finish previewing receipts, you can choose to print or close the preview window. If you print from the Preview screen, a message appears to ask if all receipts printed correctly. If you close the preview screen without printing the receipts, you see only the message asking whether to mark the gifts as receipted.

Restarting a Receipt Run in Mail

The next available receipt number is updated once all receipts run and you click **Yes** to mark all gifts as receipted when asked.

You can reprint receipts in *Mail* only if the mail task is still open and you have not clicked **Yes** on the message that asks whether all receipts printed correctly. If you click **No**, the Restart Run screen appears. On the Restart Run screen, you can select at which gift to restart to reprint and specify the starting receipt number to use.

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Did all receipts print correctly?

Yes   No

When you click **Yes**, a message appears to ask whether to mark the gifts as Receipted.
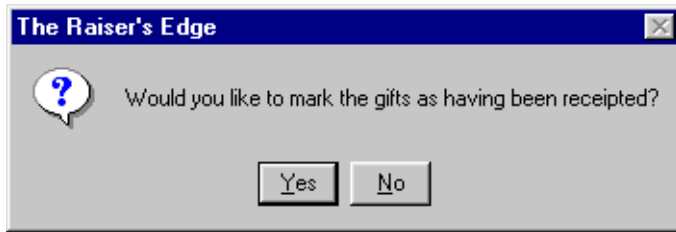
To mark all gifts included in this receipt run as receipted, click **Yes**. The gift records are updated with the correct receipt information, including date, number, and 'Receipted' status. If you click **No**, the gift records included in the mail task do not update. You return to the Receipt parameter file for standard receipts or the control report for custom receipts.

You can still manually change the receipt status on the gift record. However, you cannot reprint receipts through *Mail*.The **Reprint** function is available only on the gift record. If a gift is included in the receipt run, *Mail* generates a new receipt number that overwrites the existing receipt number on the gift record. This flow chart is a very basic depiction of the process for reprinting receipts in *Mail*.
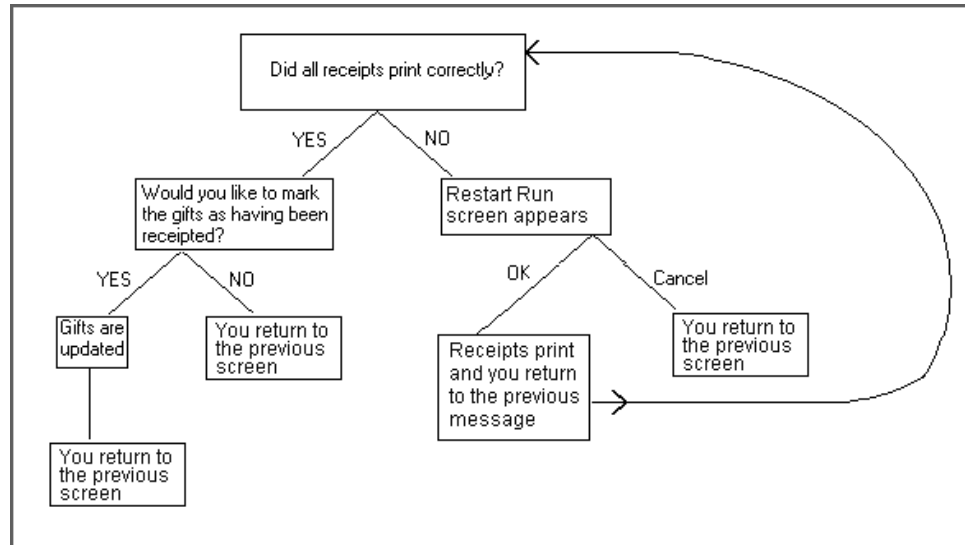
> ➤ **Restarting a receipt run**

   You print standard receipts through *Mail* and the printer jams. At the Restart Run screen, decide where in the receipt run this happened and begin to reprint at that gift record.

1. From a receipts parameter file, click **Print**. For more information about running receipts, see the *Mail Guide*.

   When the mail task finishes, a message appears to ask whether all receipts printed correctly.

2. Click **No**. The Restart Run screen appears.

3. In the **Step 1** grid, select the gift where the last receipt printed correctly. To search the grid for the gift, click **Find**.

4. In **Step 2**, select the starting receipt number to use. You can select to either **Reuse the same receipt number(s)** or **Start with receipt number [ ]**. For example, if you use preprinted receipts with the numbers already printed on them, select **Start with receipt number [ ]**.

5. Click **OK**. The receipts print again, starting with the selected gift.

When the mail task finishes, the message appears to ask whether all receipts printed correctly.
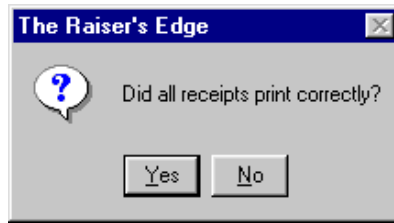
6. If the receipts printed correctly, click **Yes**. A message appears to ask whether to mark the gifts as Receipted.
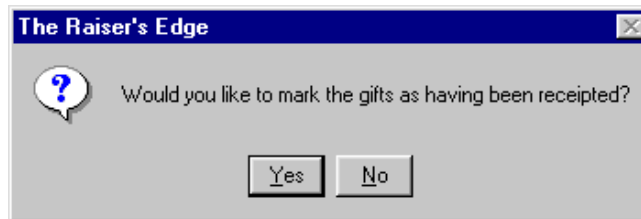
7. To track the gifts for which you have sent receipts, click **Yes**. Otherwise, click **No**. You return to the mail task.

8. To save the mail task, on the toolbar, click **Save**.

9. To close the mail task, select **File**, **Close** from the menu bar. For more information, see the *Mail Guide*.

If there was a problem with the receipts you print through *Mail* and you already marked the gifts as Receipted, you should manually reprint each receipt that did not print correctly from its gift record.

If there are too many receipts to reprint individually, you can use *Query* and **Global Change** to find and update the last records marked as Receipted and rerun them through *Mail*. For example, your printer runs out of toner on the last 50 receipts you print in *Mail*, but you do not notice until after you mark all gifts as Receipted. You can create a Gift query using the filters Receipt date = Today and Receipt number between the number on the first gift to be rerun and the next available receipt number. With **Global Change** in *Administration*, you can change the status of the records included in the query from "Receipted" back to "Not receipted". After you replace the printer's toner, rerun the Receipts mail task in *Mail* for the records included in the query. For more information about **Global Change**, see the *Global Add, Change, & Delete Guide*. For more information about how to create a query, see the Query chapter of the *Query & Export Guide*. We recommend you limit access to these areas of the program through *Security*. For more information, see the Security chapter of the *Configuration & Security Guide*.

Gift Amount vs. Receipt Amount

Both the gift **Amount** and **Receipt amt** fields appear on the gift record. The values in these fields may be the same, or they may be different. When you print receipts from *Mail*, on the Format Tab, Output Options screen, you can select either Receipt or Gift in the **Amount to Print** field.
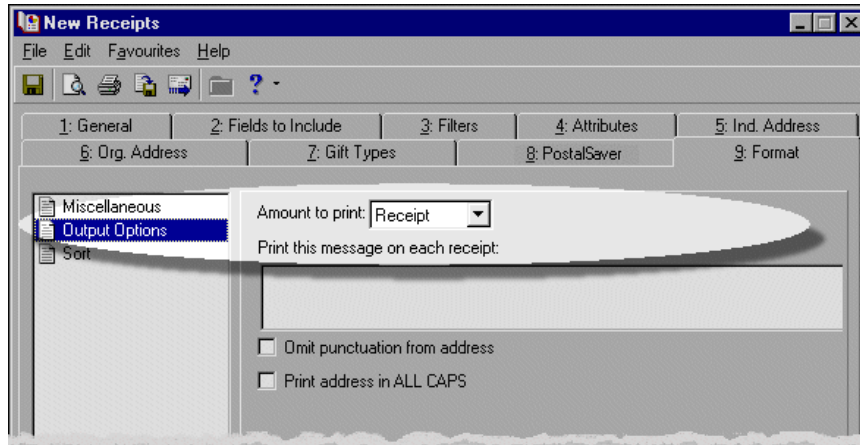
- If you select Receipt, the receipt amount prints on the receipt.
- If you select Gift, the gift amount prints on the receipt.

Benefits Amount/Value of Advantage

If the gift has a benefit value, you must print it, the original gift amount, and the amount eligible for tax purposes on the receipt. When you print receipts from *Mail*, on the Fields to Include tab, you can select to print the benefits amount on the receipt. To print the benefits amount, add Preprinted Fields: Benefits Amount (Total For Gift) to the **Fields to Export** box. If the gift has a benefit value, it prints on the receipt as the Value of advantage.
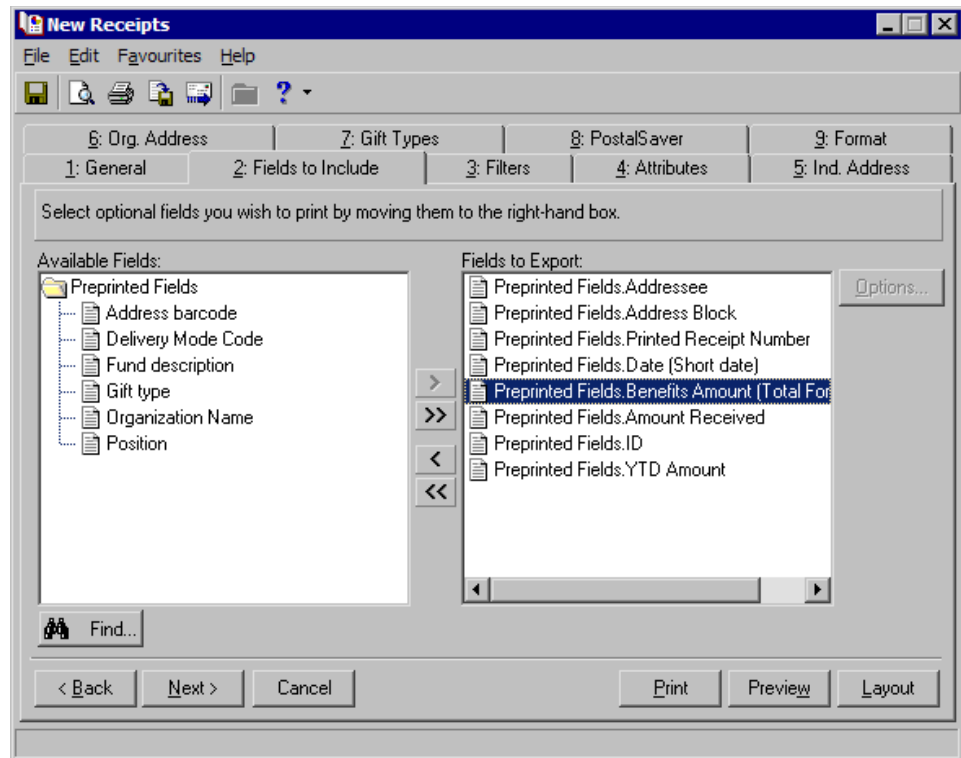
Entering Receipt Numbers on Gift Records

When you enter receipt numbers on the Gift tab of the gift record, either for the first time or when you edit an existing gift, the program checks for duplicate receipt numbers as soon as the gift is saved. If the receipt number is already in use on a gift record in the database, a message warning that the receipt number is already in use appears.
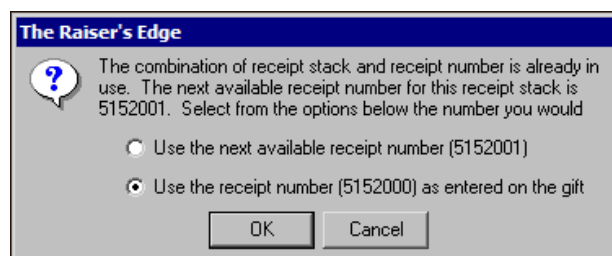
If you are about to reuse a number, the program warns you but does not prevent you from doing so. If you choose the **Use the receipt number ( ) as entered on the gift** option, you will have duplicate receipt numbers.

The program also checks to see if the receipt number you enter is higher than the next available receipt number. If it is, a message appears to tell you that you are about to skip receipt numbers and ask whether you really want to do so.

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❓ Warning: The receipt number entered (7000823) is higher than the next available receipt number (5152001) for this receipt stack. This will result in receipt numbers being skipped. Do you want to continue and use the number entered (7000823)?

OK   Cancel
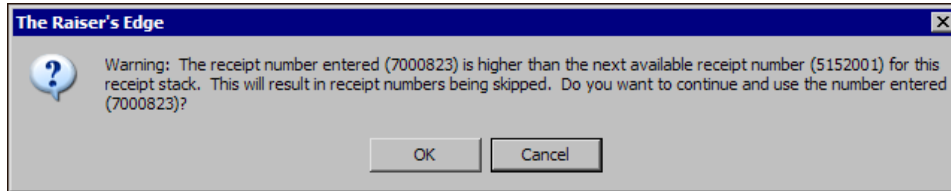
Again, this message only warns you that you will skip receipt numbers, but does not prevent you from doing so. If you skip receipt numbers, the program stores the next available receipt number as one greater than the highest receipt number. You can manually enter receipt numbers that have been skipped directly onto the gift record, but *Mail* does not use skipped numbers for receipting. *Mail* only starts at the next available receipt number.

If the Receipts mail task is being run on one workstation, no other user can run receipts from another workstation. However, you can enter and edit gift information while the receipts print.

Reprinting Receipts from Gift Records

To reprint receipts, select **Gift**, **Reprint Receipt** on the menu bar of a gift record.
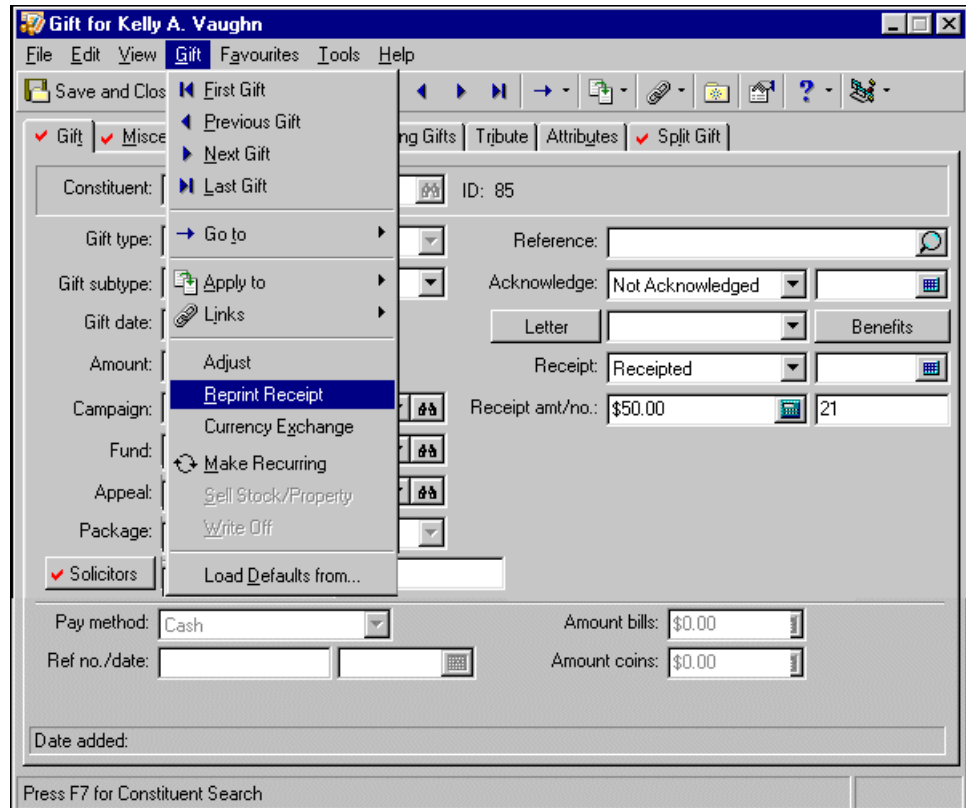
Reprint Receipt Screen

On the **Gift** menu, the **Reprint Receipt** selection is enabled only if the gift is marked as Receipted and a receipt number is entered on the gift. When you select **Gift**, **Reprint Receipt**, the Reprint Receipt screen appears.

Receipt action. The **Receipt action** field indicates the type of receipt transaction being processed on the gift record. It explains why it is necessary to print another receipt for this gift. What you select in this field appears on the Receipt History screen.

The **Receipt action** field is required. However, you must define the options for this field. We recommend you define the options of Reprint and Reissue. Or, enter the terms your organisation uses to distinguish between different types of reprinted or reissued receipts. To create table entries for the field, click **Receipt action**. The Receipt Actions screen appears. To add new options for this field, click **Add**.

Receipt history reason. This field includes an explanation of why receipts have been reprinted or reissued. What you enter in this field appears on the Receipt History screen.

Use this parameter file. To reprint or reissue a receipt, you can use the settings of existing Receipts parameter files. To search for an existing Receipts parameter file, click the binoculars. These parameter files are created and stored in *Mail*.

Receipt number to use. These options enable you to reprint the receipt with the next available, same, or different receipt number. This is required. CRA requires that receipts have a receipt number.
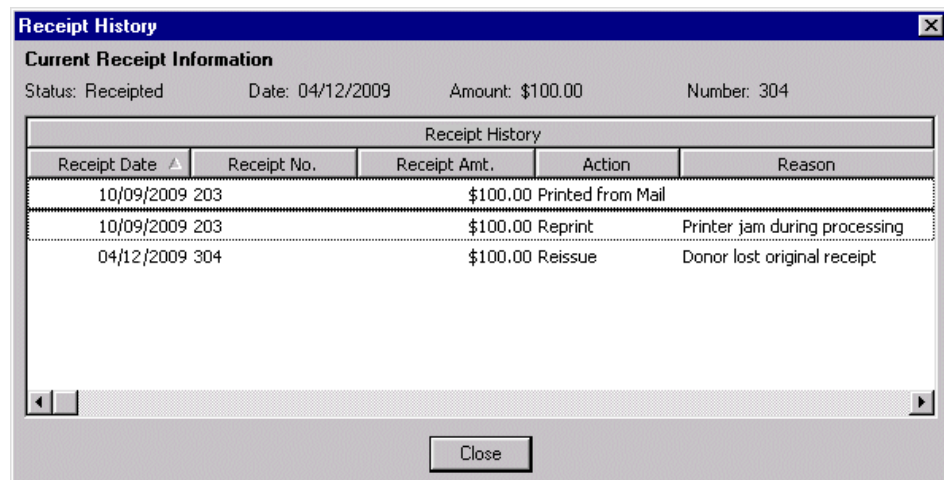
Message to print on receipt. The message you enter here automatically appears on standard receipts. If you export receipts, the message is added to the export file. This message overwrites any message in the receipt's parameter file, which you select on the Format Tab, **Output Options** of the mail task. This message also overwrites any benefit **Notes** entered on the Benefits screen, accessed through the gift record.

For consolidated receipts, we strongly recommend you enter a message including the date range the gifts were given. CRA requires a date, which does not automatically print for consolidated receipts.

Receipt Field and Receipt History Screen

If the receipt for a gift has been printed at least once, the label for the **Receipt** field on the Gift tab of the gift record becomes a button. To access the Receipt History screen for the particular gift, click the **Receipt** button.

To appear on and update the Receipt History screen, the receipt must be printed from *Mail* or a parameter file (selected when you print from the gift record). If you manually mark the gift as 'Receipted' on the gift record, the **Receipt History** grid does not update.

To update the **Receipt History** grid, click **Yes** at the message that appears after printing the receipt(s) and ask "Would you like to mark the gifts as having been receipted?" (for new receipts) or "Would you like to update receipt information?" (for reprints).

Receipt History				☒
Current Receipt Information				
Status: Receipted	Date: 04/12/2009	Amount: $100.00		Number: 304

Receipt History				
Receipt Date △	Receipt No.	Receipt Amt.	Action	Reason
10/09/2009	203	$100.00	Printed from Mail	
10/09/2009	203	$100.00	Reprint	Printer jam during processing
04/12/2009	304	$100.00	Reissue	Donor lost original receipt

[Close]

Current Receipt Information. The **Status**, **Date**, **Amount**, and **Number** for the most recently reprinted receipt appear across the top of the screen.

Receipt Date. The **Receipt Date** that appears on this screen is the original receipt date on the gift, before it is reprinted. When the receipt prints, both the original and the current (reprint) date are listed.

Receipt No. This is the receipt number on the gift before it is reprinted.

Receipt Amt. This is the receipt amount on the gift before it is reprinted.

Action. This field refers to the type of receipt transaction, as defined on the Reprint Receipt screen.

Reason. This field further explains why the gift was reprinted. This information is from the **Receipt History Reason** field on the Reprint Receipt screen.

The **Receipt History** grid on the Receipt History screen is for informational purposes only. You cannot enter information in this grid. The grid sorts by **Receipt Date** in ascending order by default. To sort the grid by another column header, click and drag the column header.

Reprinting Receipts

Before you reprint receipts, if you are unsure which area of the program to use, ask yourself these questions:

- **Why are you reprinting the receipts? Was there a printer problem or a user error in data entry, or did the donor lose the original receipt?**

  If a printer problem occurs while you are still initially printing the receipts using the Receipts mail task in *Mail*, you can reprint by using the Restart Run screen. You can do so only if you have not yet clicked **Yes** on the "Did all receipts print correctly?" message.

  If you reprint a receipt due to error, either in data entry or on the donor's part, or if the donor loses the original receipt, you must reprint from the gift record. On the menu bar, select **Gift**, **Reprint Receipt**. Include a message to indicate it is a duplicate receipt.

- **Did the donor already receive the receipt?**

  If so, you must reprint the receipt with a new number and a message to indicate it is a reprinted receipt. If not, you do not need to include the message and you can use the same receipt number, if it is not preprinted on the receipt.

➢ **Reprinting a previously issued receipt**

Kelly Vaughn says she cannot find her receipt for a $50 gift given on 02/02/2007. To reprint the receipt, use the **Gift**, **Reprint Receipt** menu on the gift record. Include a message stating this receipt replaces the original receipt and include the original receipt number. Use the next available receipt number.

1. From the gift record for Kelly Vaughn for $50, dated 02/02/2007, select **Gift, Reprint Receipt** from the menu bar. For more information about opening gift records, see the *Gift Records Guide*.
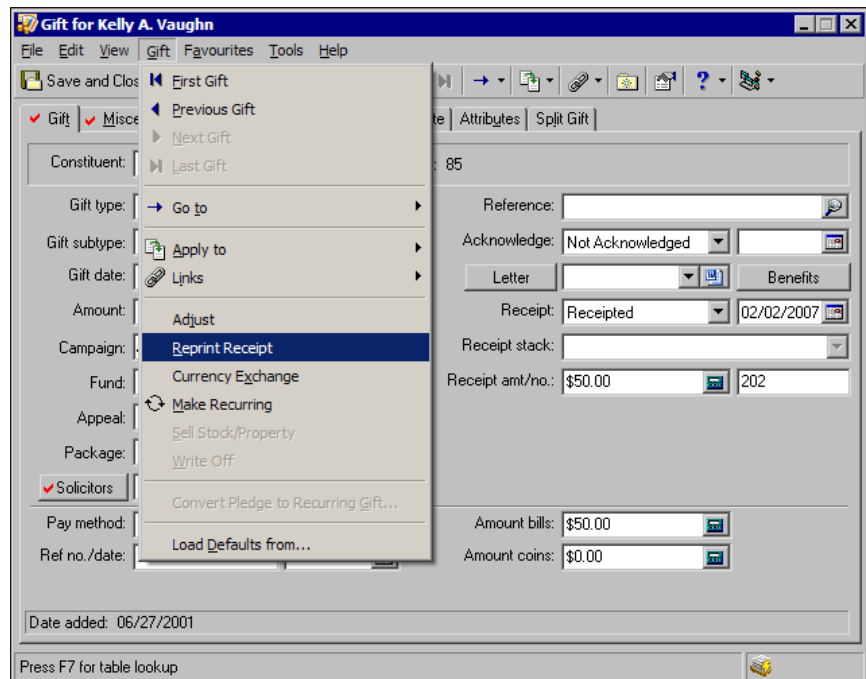
The Reprint Receipt screen appears.

2. In the **Receipt action** field, select Reissue because the donor asked you to reissue the receipt.

3. In the **Receipt history reason**, enter "Donor lost receipt" as the explanation to appear on the Receipt History screen.

4. In the **Use this parameter file** field, click the binoculars and select a parameter file of established settings to use to reprint the receipt. The Select a Parameter File screen appears. For this example, select Gift Receipts for Supervisor. For more information about selecting parameter files, see the *Mail Guide*.

5. In the **Receipt number to use** field, select the **Next available** option.

6. In the **Message to print on receipt** field, enter "This duplicate receipt replaces receipt no. 202."

7. Click **Print**.

8. Because the parameter file you selected has the **Save Static Query** checkbox marked, the Save Static Query screen appears.

You must define the options available for the **Receipt action** field. We suggest you use Reissue and Reprint to define the receipting action from the gift record. See the sample database that comes with the program for examples. To add field options, click **Receipt action**.

If the donor has not yet received the receipt, you can use the **Same** option, if you want to use the same receipt number as on the original.

9. Because you are only printing one record in this receipt run, you do not need to save a query of the records included in the run. Click **Cancel**. The receipt processes and the update information message appears.
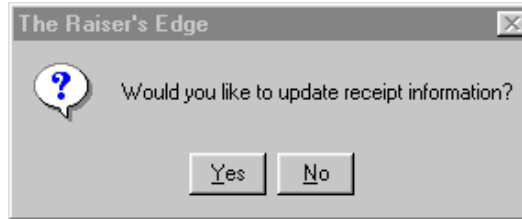
10. To update receipt information on the gift record, click **Yes**. You return to the gift record.

11. To save and close the record, click **Save and Close** on the menu bar.

Batch

You do not have to enter the receipt number in batch.

When you enter gifts in a gift batch, you can select the receipt fields for data entry. However, the program does not check for duplicate receipt numbers during data entry, but only when you **Commit** or **Validate** the batch. Duplicate receipt numbers can cause an exception and appear on the batch exception report.

The **Tools**, **Global Change** menu item in *Batch*, which enables you to make all entries in a selected column the same, is not available for the **Receipt number** column.

For gifts not present on the batch data entry grid, receipt numbers are handled according to the following:

*   Cash gifts created from pledge overpayment; options are available on the Receipts tab of the Commit Batch screen.

*   Payments added using **Add Payments to Pledge**; options are available on the Receipts tab of the Commit Batch screen.

*   Payments added using **Add Payments to Recurring Gifts**; options are available on the Receipts tab of the Commit Batch screen.

*   Receipt numbers for Matching Gifts are never to be automatically added to the Matching Gift pledge. Receipts are normally processed for payments, rather than pledges. Pledges normally receive pledge reminders.

Receipts Tab on Commit Batch Screen

If the receipt number field is included on the Data Entry screen, a new Receipts tab appears on the Commit Gift Batch screen. The options on the Receipts tab designate what to do if a receipt number entered in the batch being committed is a duplicate of an existing receipt number in the database.

Create an exception if the duplication exists on any constituent's gift(s). If a duplicate receipt number is found, that gift transaction becomes an exception and appears on the exception report. It is handled according to how you specify on the General tab, as to whether a new Gift batch of exceptions is generated.

Create an exception if the duplication exists on a different constituent's gift(s). If you select this option, an exception generates only if the receipt number exists on a gift record of a different constituent than on the gift being committed. For example, if a gift is being committed for John Doe with a receipt number of 9 and John Doe already has a gift in the database with a receipt number of 9, the gift does not become an exception. However, if Mary Smith has a gift already in the database with a receipt number of 9, John Doe's gift becomes an exception because the receipt number appears for two different constituents.

Commit the gift anyway. If you select this option, the batch does not check for duplicate receipt numbers and simply commits all gifts, as long as nothing else causes an exception.

The next available receipt number is not updated in the database until the batch is committed.

If transactions are automatically generated, then all fields not currently in the batch are added to the batch. This includes the Receipt number. Therefore, the Receipts tab is always present when auto-generated transactions are added to the batch.

If you select the **Commit the gift anyway** option, you may get duplicate receipt numbers in your database.

Validate Gift Batch Screen

The **If duplicates are found** frame appears at the bottom of the Validate Gift Batch screen. The options available in this frame on the Validate Gift Batch screen are the similar to those on the Receipts tab of the Commit Batch screen. However, when you Validate a batch, the program checks only for duplicate receipt numbers entered in the current batch. It does not search the database for duplicates of existing receipt numbers. Though duplicates are not noted on the Validate screen, they can generate exceptions. For more information about the Commit batch screen, see "Receipts Tab on Commit Batch Screen" on page 25 of this guide or the *Batch Guide*.

Query and Export

You can use the fields in the Gift Receipt History category, available on the Criteria tab in both *Query* and *Export*, to export and query on past receipt history information. The fields in the Gift Receipt History category added to *Query* and *Export* are: **Previous Receipt Amount**, **Previous Receipt Date**, **Previous Receipt Number**, **Previous Receipt Reason**, and **Previous Receipt Type**.
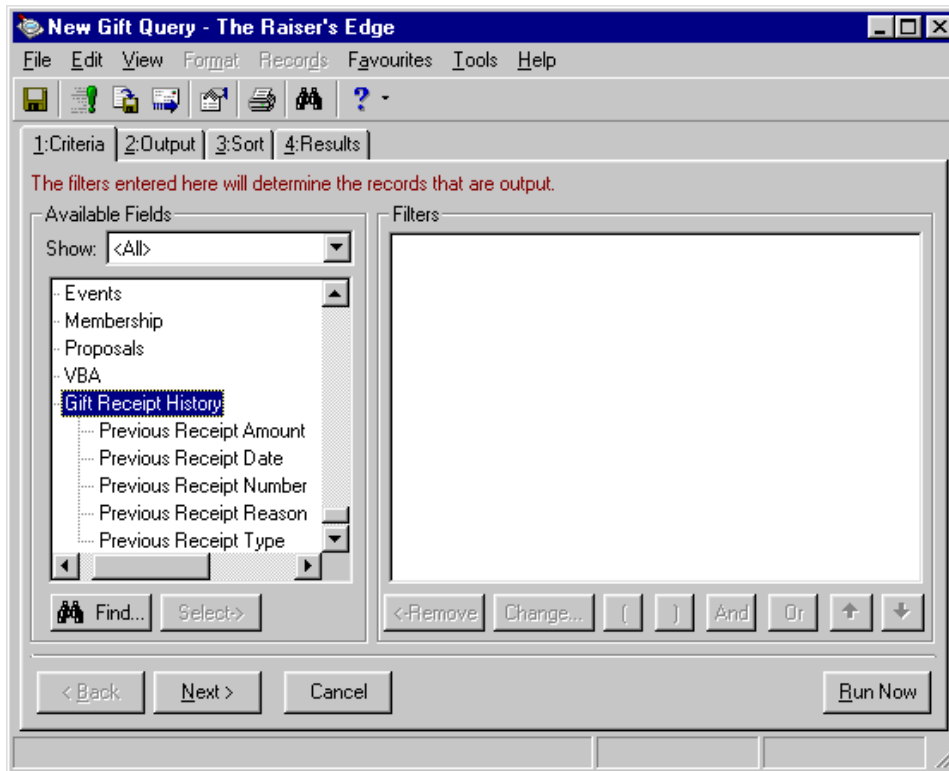
The Gift Receipt History category is available under all Gift categories in *Query* and *Export*, including First Gift, Last Gift, and Largest Gift subcategories.

Keep in mind, the receipt information found in the gift fields directly under the Gift information category represent the most recent receipt information for that gift. These fields are one-to-one fields. The fields under the Gift Receipt History category are one-to-many fields and represent previous receipt information.

One-to-one fields can only have one relationship to other fields. For example, the spouse field has a one-to-one relationship with a biographical field because each constituent can only have one spouse. One-to-many fields can have several various relationships to other fields. For example, a biographical field has a one-to-many relationship with a gift field because each constituent can have many gifts.

Administration

Duplicate Receipt Report

To search the database for gifts with duplicate receipt numbers, click the
Duplicate Receipts link on the Administration page. You can create an output
query of the gifts returned in the search. We recommend you run this process in
post-conversion clean-up.
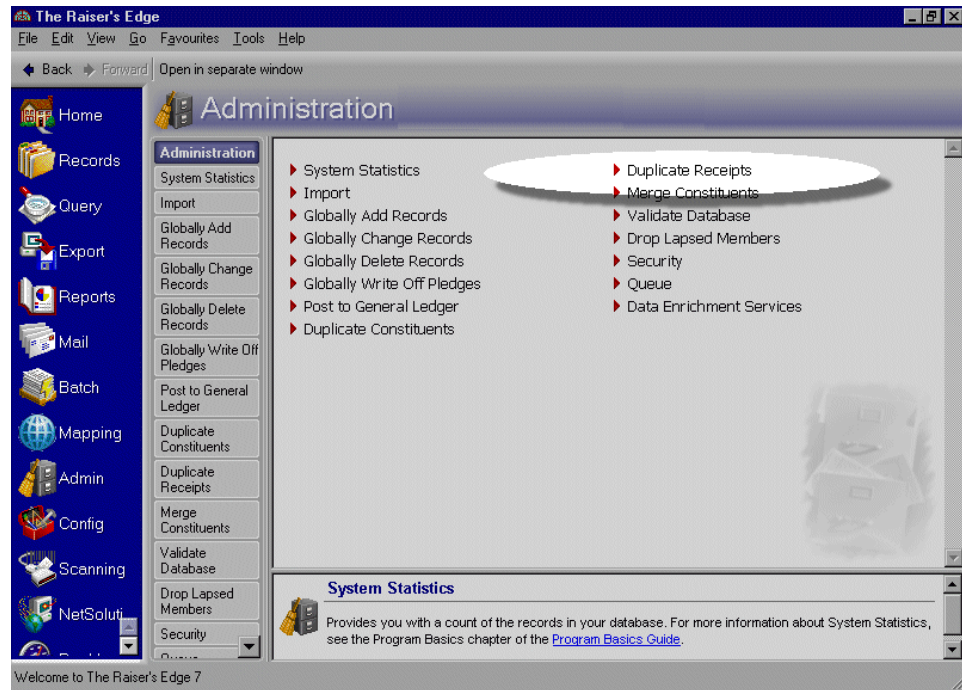
The **Receipt** column
displays the **Receipt
number**, if you are
receipting from only one
receipt stack. If you are
using multiple receipt stacks
and tracking them in
The Raiser's Edge, the
Receipt column displays the
Printed Receipt Number (a
combination of **Receipt
Stack ID** and **Receipt
number**). For more
information, see "Receipting
Using Multiple Receipt
Stacks" on page 35.

The Duplicate Receipt Report includes: **Receipt**, **Constituent Name**, **Gift ID**,
Fund ID, **Gift Date**, **Gift Amount, Receipt Date**, and **Receipt Amount**
columns. Due to the number of columns, the report does not accommodate the
Fund Description.

If gifts are split among several funds, all fund IDs list on the report. These funds are separated by commas, and the row in the report expands to accommodate the multiple funds.

The Duplicate Receipt Report sorts first by the receipt number and then by the constituent's name. You can print the Duplicate Receipt Report from the preview screen that appears after you click **Run Report Now** on the Duplicate Receipt Report screen, accessed through the **Duplicate Receipts** link on the Administration page.

Duplicate Receipt Report Screen

When you click the **Duplicate Receipts** link on the Administration page, the Duplicate Receipt Report screen appears. On this screen, select which records and for which receipt numbers to search or not search in the database.

Exists on any constituent's gift(s). When you select this option, the gift is included in the report if the same receipt number appears on any two gifts for the same or different constituents.

Exists only on a different constituent's gift(s). When you select the option, gifts are included in the report only if the same receipt number appears on gift records for different constituents.

Include gifts from constituents who receive consolidated receipts. When you mark this checkbox, gifts for constituents whose **Receipt Type** on the Bio 2 or Org 2 tabs are set to Consolidate Receipts are included in the duplicate receipt number search.

Create gift output query of duplicate records. When you mark this checkbox, a gift output query of all gifts with duplicate receipt numbers is created.

Run Report Now. When you click this button, the program checks for duplicate receipts. A preview of the Duplicate Receipt Report appears.

Import

The program checks for duplicate receipt numbers during the Importing, Updating, and Validating processes for the following import types: Gift, Pledge Payment/MG Pledge Payment, and Recurring Gift Payment. To start the database check, click **Import Now**. The program checks for duplicate receipt numbers in the database, not the import file.

Gifts with their receipt numbers updated through **Import** do not have an entry added to the grid on the Receipt History screen. The **Receipt History** grid is updated only when you select **Gift**, **Reprint Receipt** from the menu bar of the gift record.

For more information about the **Receipt History** grid or reprinting receipts from the gift record, see "Reprinting Receipts from Gift Records" on page 18.

Summary Tab

A section appears so you can define how to process duplicate receipt numbers during an import. The section appears between **Import Options** and **Import Summary Information** on the Summary tab of the Import parameter file.
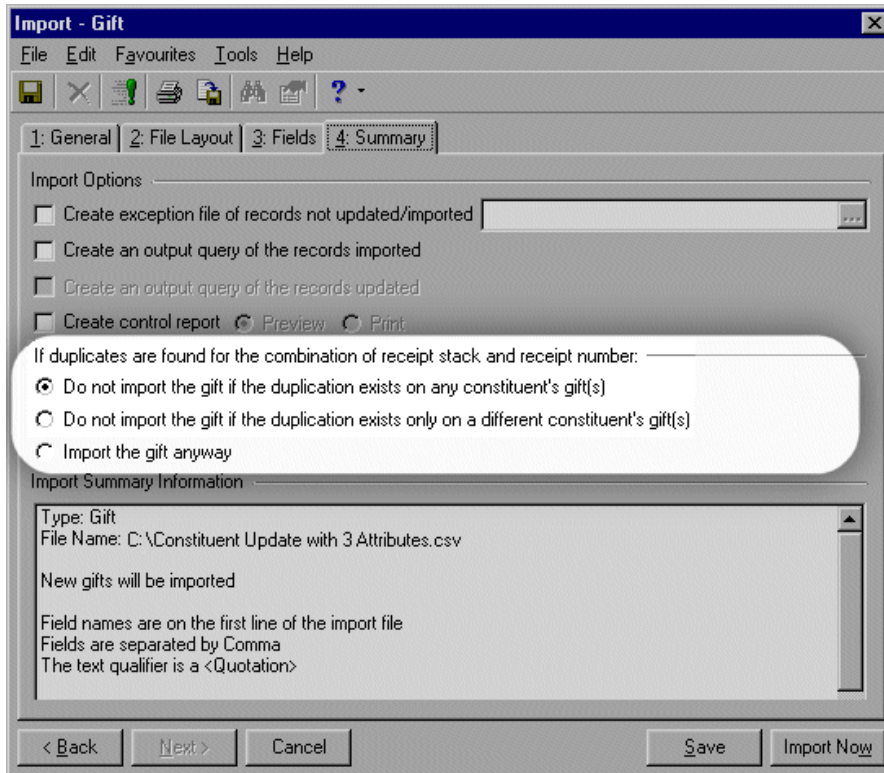
Do not import the gift if the duplication exists on any constituent's gift(s). This is the default selection. If the receipt number on the gift in **Import** is on any gift record in the database, that gift creates an exception and appears on the exception report. Based on the user's defined User Options for **Import**, an exception file can be generated for records not updated/imported.

Do not import the gift if the duplication exists only on a different constituent's gift(s). Exceptions are generated if the receipt number exists on a gift record for a different constituent than on the gift being imported. For example, if a gift is being imported for Kevin Singleton with a receipt number of 112 and Kevin Singleton already has a gift in the database with a receipt number of 112, that gift in the import file will not be an exception. However, if Tyler Jones has a gift already in the database with a receipt number of 112, Kevin Singleton's gift creates an exception.

Import the gift anyway. When you select this option, **Import** does not check for duplicate receipt numbers and simply imports all gifts as long as nothing else causes an exception.

When the **Import** process finishes, the program updates the next available receipt number. If the receipt number on an imported gift is greater than or equal to the next available receipt number stored by the program, the next available receipt number becomes one greater than the highest receipt number. For example, if the next available receipt number stored by the program before **Import** is 50, but the highest receipt number imported is 100, the next available receipt number becomes 101 after the import is complete.

The **Receipt Number** field supports only numeric characters and has a maximum value of 2147483647. If you attempt to import a gift whose receipt number contains invalid characters or is greater than this number, that gift creates an exception with the reason of Invalid receipt number.

Queue

If you include receipts in the queue, the program does not display the warning for other users not to enter receipt numbers while the receipt function runs.

When you view the parameter file via *Queue for Task Scheduling*, the **Start receipt no.** field on the General tab behaves the same way as on the General tab in *Mail*.

When you process each receipt run in the queue, the first receipt number starts with the next available receipt number stored in the program or the value currently saved on that mail parameter form, whichever is higher.

You cannot specify whether to mark gifts as receipted for each receipt run. To avoid problems with receipt numbers, gifts receipted via *Queue for Task Scheduling* are always marked receipted.

When receipts finish processing, the program updates the next available receipt number.

Defaults

There is a Business Rule that enables gifts to be automatically created when you add memberships or when registration fees are added for event registrants. Event registrants must meet one of these requirements:

• The registrant is a constituent.

• The registrant has a row added to the registration fees grid.

• The registrant does not already have a gift linked.

Receipt number is not available for selection on the General screen of Gift defaults. To access the Gift Defaults screen, select **Tools**, **Organise/Create Defaults** on the menu bar on the shell of *The Raiser's Edge*. This prevents duplicate receipt numbers when gifts are automatically generated during membership and registration fee imports.

Configuration

The next available receipt number is stored under **Gift options**, **Activity options** on the Business Rules page in *Configuration*. The next available receipt number is updated if the receipt number is automatically generated or if you enter a receipt number manually.
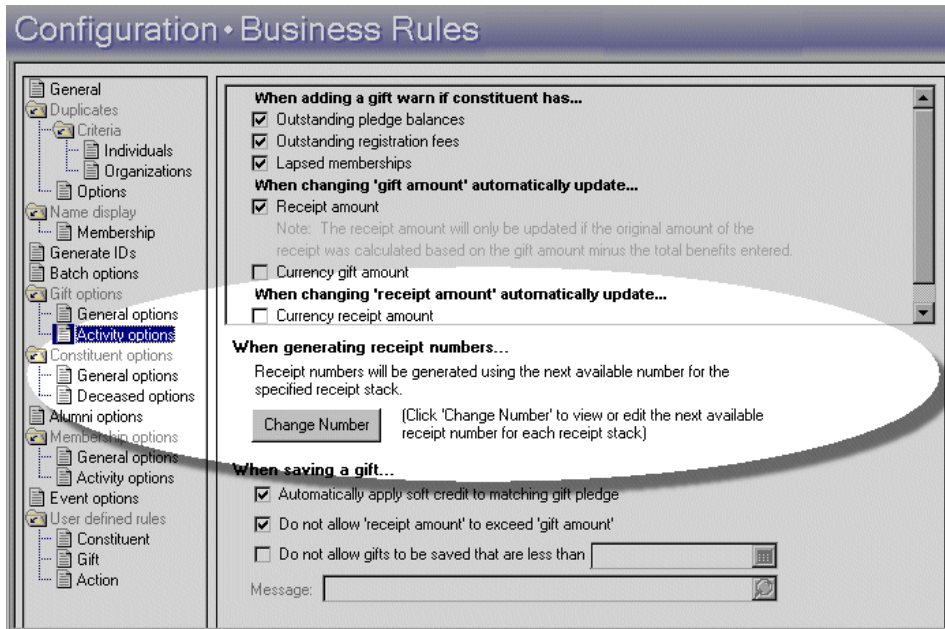
On the Business Rules page, anyone with rights established from the **Security** link of *Administration* can change the next available receipt number. To change the next available receipt number, click **Change Number**. The Change Next Available Receipt Number screen appears.
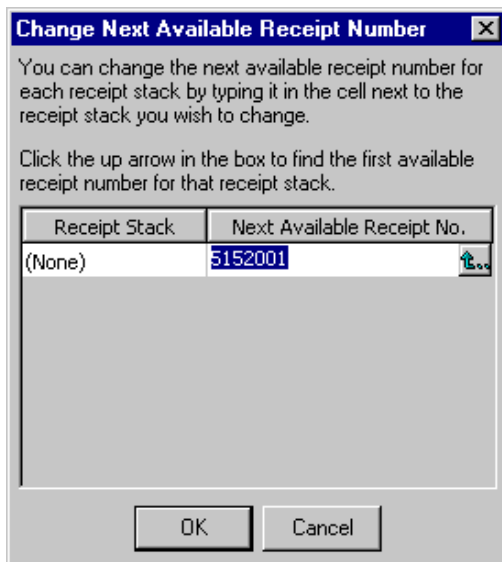
You can manually enter a number in the **Next available receipt number** field. The program verifies the receipt number you enter is greater than or equal to the number stored in the program. You can only enter numbers in this field. The maximum number is 2147483647. To find the lowest available receipt number, click the ellipsis with the up arrow.

To update the next available receipt number, click **OK**. To close the screen without updating the receipt number, click **Cancel**. You return to the Business Rules page.

VBA and API

When you write code to run a receipt parameter form through *VBA for Advanced Customisation* or *API for Advanced Application Development*, the warning to make sure other users are not updating gifts does not appear.

When you run receipts through *VBA* or *API*, the start receipt number is either the next available or the value set by the user. No warning message appears if the next available receipt number is higher than the one stored in the parameter file being used.

When receipts run through *VBA* or *API*, the program updates the next available receipt number, if you select to mark gifts as Receipted.

Receipting Using Multiple Receipt Stacks

Contents

Chapter 3

In *The Raiser's Edge* versions *7.5* and higher, you can use multiple receipt stacks to receipt gifts and still remain in accordance with Canadian receipting requirements. If you work with multiple databases, have multiple offices, or receipt gifts multiple ways, for example, through print or email, or any other similar scenario, you use multiple receipt stacks. *The Raiser's Edge* can account for multiple receipt stacks, so each stack you use remains in correct order and ensures the receipt numbers in each stack are not reused.

When you use multiple receipt stacks, we strongly recommend you consistently record receipt stack information one of two ways.

- When you enter a gift, consistently enter the receipt stack on the gift record.

- Consistently use the Receipts mail task in *Mail* to assign the receipt stack.

To avoid complications in receipting, do not vary the way you record receipt stack information. We recommend you choose one way and stay consistent.

Receipt Stacks Code Table

If you do not truly use multiple receipt stacks, do not enter information in the **Receipt Stacks** code table or use the **Receipt Stack** fields on gift records and in *Mail*.
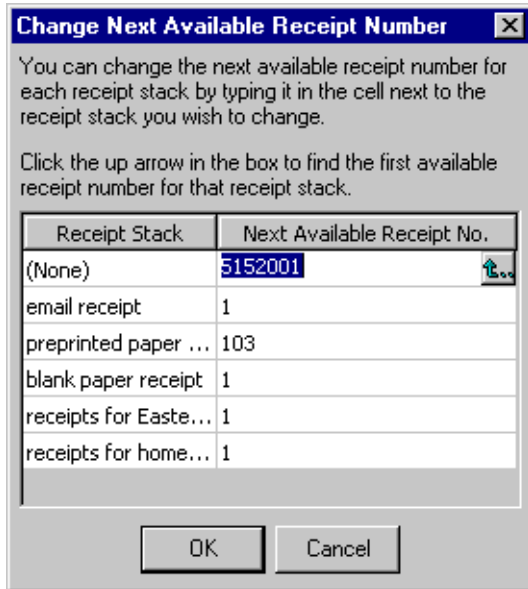
In *Configuration*, you enter multiple receipt stack information in the **Receipt Stacks** code table under **Tables**. The **Receipt Stack** field does not appear on the gift record or in *Mail* until there is at least one entry in the **Receipt Stacks** code table.
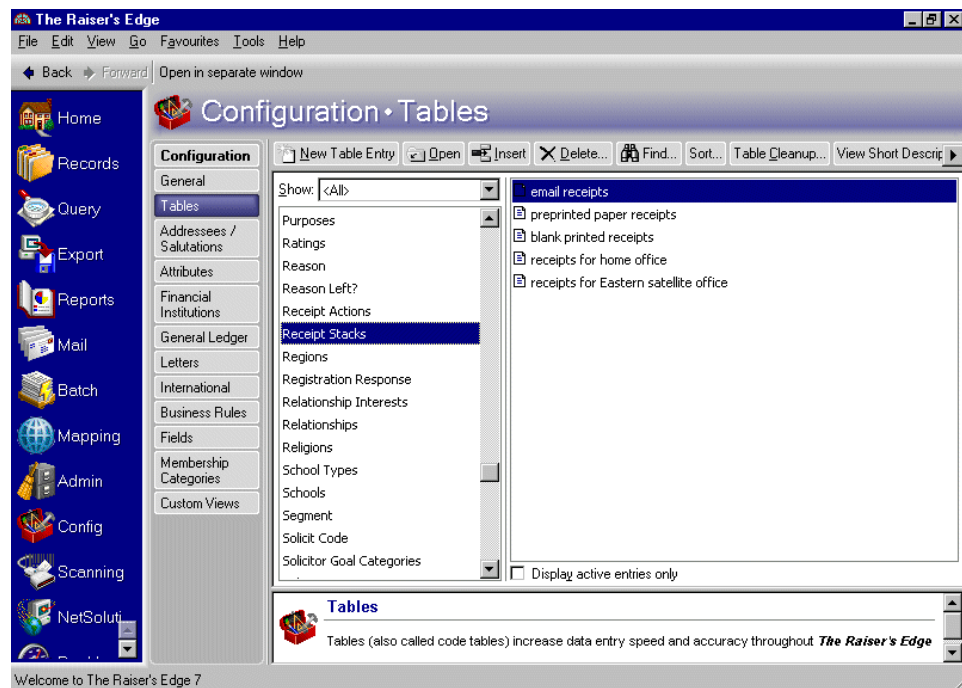
A receipt number can be duplicated in the database, as long as it is not duplicated within the same receipt stack.

If you do not truly use multiple receipt stacks, do not enter information in the **Receipt Stacks** code table or use the **Receipt Stack** fields on gift records and in *Mail*.

Next Available Receipt Number

The Change Next Available Receipt Number screen lists the next available receipt number for each receipt stack entered in the **Receipt Stacks** code table. To access the Change Next Available Receipt Number screen, click **Change Number** under **Gift options**, **Activity options** on the Business Rules page of *Configuration*.

Change Next Available Receipt Number

You can change the next available receipt number for each receipt stack by typing it in the cell next to the receipt stack you wish to change.

Click the up arrow in the box to find the first available receipt number for that receipt stack.
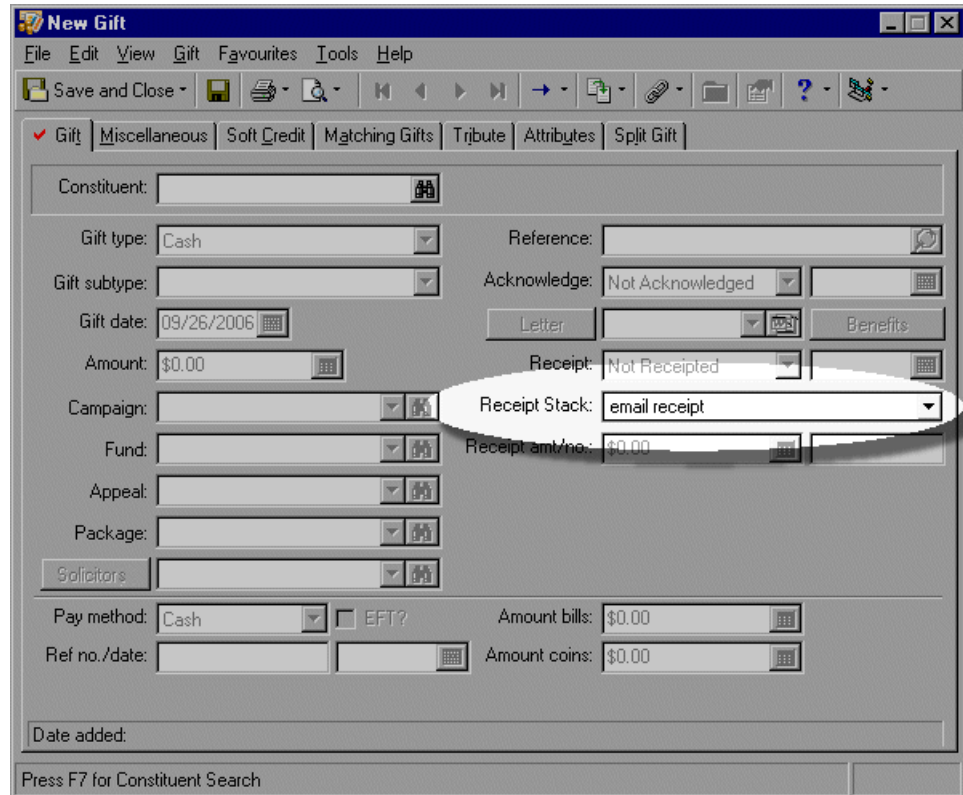
Receipt Stack	Next Available Receipt No.
(None)	5152001
email receipt	1
preprinted paper ...	103
blank paper receipt	1
receipts for Easte...	1
receipts for home...	1

OK   Cancel

Entering Receipt Stack Information on the Gift Record

The **Receipt Stack** field appears on the gift record. If you enter receipt stack information on the gift record, select the receipt stack to use to receipt this gift. For example, if you use two separate means of receipting, email receipts and printed receipts, select which type of receipt this gift will receive.

The values available for selection in the **Receipt Stack** field on the gift record come directly from entries in the **Receipt Stacks** code table in *Configuration*. For more information, see "Receipt Stacks Code Table" on page 36.

If you enter receipt stack information on the gift record, when you run the Receipts mail task in *Mail*, you select for which receipt stack to create receipts. Gift records with the matching receipt stack entered in the **Receipt Stack** field are included in the mail run. In this case, select the **Selected receipt stack only** in the **Include gifts with these receipt stacks** frame.

You can also enter receipt stack information when you receipt in *Mail*. However, if you choose to track multiple receipt stack information this way, do not enter anything in the **Receipt Stack** field on the gift record when you create or save a gift record. When you run receipts in *Mail*, the program enters a selection in the **Receipt Stack** field on the gift record. For more information, see "Entering Receipt Stack Information on Receipts in Mail" on page 44.

Gift Default Set

You can include the **Receipt Stack** on a Gift Default Set to automatically fill in the **Receipt Stack** field on a gift record when you select **Gift**, **Load Defaults from** from the menu bar of the gift record. For more information about how to create gift default sets, see the *Program Basics Guide*.

Printed Receipt Number

The **Printed Receipt Number** is created from a combination of the **Receipt Stack ID** (taken from the **Receipt Stacks** code table in *Configuration*) and **Receipt Number** (on the gift record).

If you track multiple receipt tracks, the program searches for the repeat of this combination of numbers (**Printed Receipt Number**), instead of just the **Receipt number**, when you run receipts in *Mail*; save a gift record; reprint or reissue a receipt from the gift record; commit a gift batch; or run an import, query, or export.

If you track multiple receipt stacks and select three per page in the **Receipt type** field on the General tab, the **Printed Receipt Number** replaces **Receipt Number** in the list on the Fields to Include tab for the Receipts mail task in *Mail*.
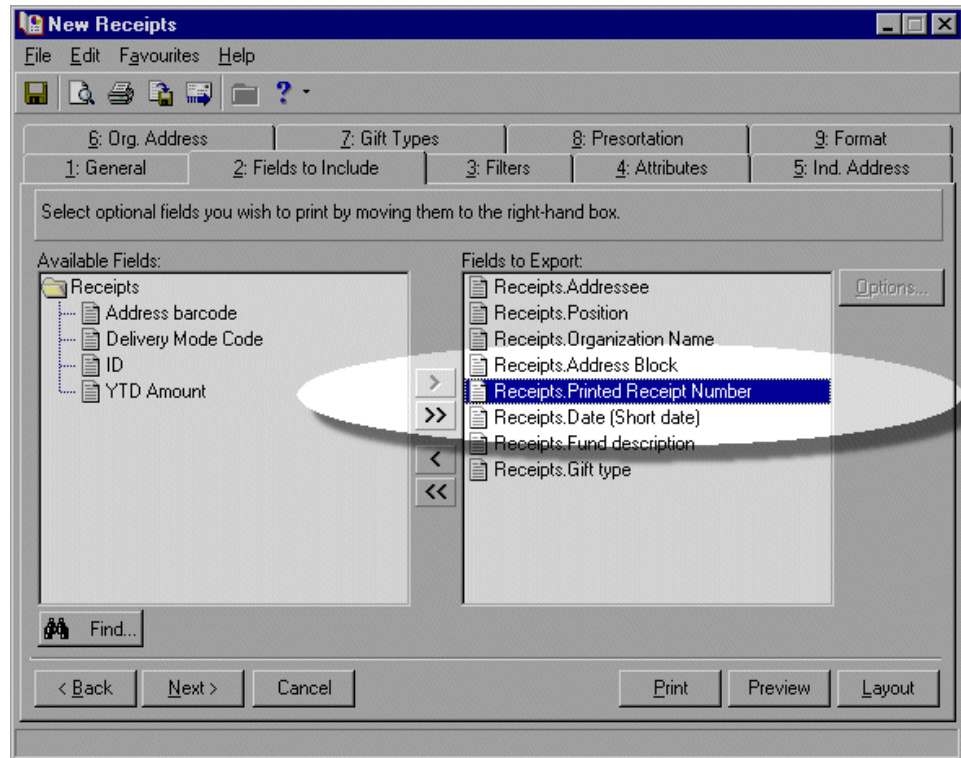
If you select Create custom data file, the **Receipt Number**, **Receipt Stack**, and **Printed Receipt Number** fields are available for selection on the Fields to Include tab. For the Donor Acknowledgement Letters mail task, **Printed Receipt Number** and **Receipt Stack** are also available for selection on the Fields to Include tab.

Split gifts have the same **Printed Receipt Number**. A split gift is a gift split among various campaigns, funds, appeals, or packages.

Duplicate Receipt Search and Warning Messages

When you save a gift record, the program checks to see if the combination of **Receipt no.** and **Receipt Stack ID** (also known as the **Printed Receipt Number**) is already used elsewhere in the database. If a **Receipt number** and **Receipt Stack ID** combination (**Printed Receipt Number**) is found to match one on an existing gift in the database, regardless of who the constituent is, a message appears to tell you and offers two options:

• Use the next available receipt number.

- Use the receipt number as entered on the gift.
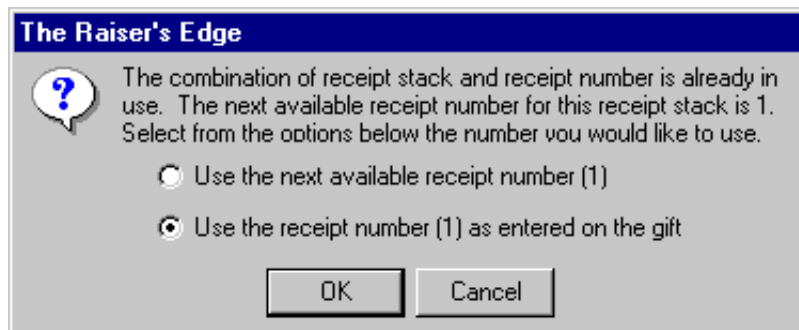
If the receipt number and **Receipt Stack** combination is not found on any other gift in the database, the program checks to see if the receipt number entered for the specified **Receipt Stack** is higher or lower than the **Next available receipt number** for that receipt stack. If the receipt number entered is higher than the **Next available receipt number**, a message appears to tell you numbers are skipped for that receipt stack. To use the number you entered, click **OK**. Otherwise, to return to the gift record to enter the next available receipt number for that receipt stack, click **Cancel**.
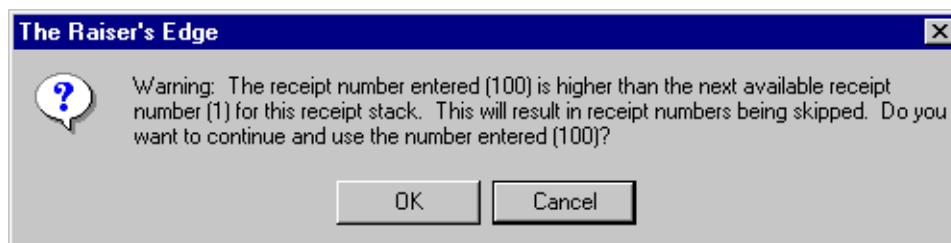
If the receipt number you enter is higher than the **Next available receipt number**, a message appears to tell you numbers are skipped.
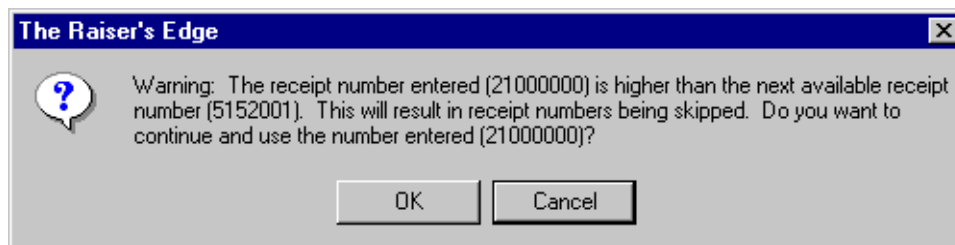
To use the number you entered, click **OK**. Otherwise, click **Cancel** to return to the gift record to enter the next available receipt number stored in *Configuration*.

Receipt History Screen

When a receipt for a gift is printed at least once, the label for the **Receipt** field on the Gift tab of the gift record becomes a button. To access the Receipt History screen for a gift, click **Receipt**.

The receipt must be printed from *Mail* or a parameter file (selected when you print from the gift record) to appear on and update the Receipt History screen. If you manually mark the gift as 'Receipted' on the gift record, the **Receipt History** grid does not update.

After you print the receipt(s), a message appears to ask "Would you like to mark the gifts as having been receipted?" (for new receipts) or "Would you like to update receipt information?" (for reprints). To update the **Receipt History** grid, click **Yes**.

On the Receipt History screen, the **Receipt Stack** column in the grid displays which receipt stack was used to reprint the receipt. Receipt stack information also appears at the top of the screen in the **Current Receipt Information** summary section.

On the Receipt History screen, the **Receipt History** grid is for informational purposes only. You cannot enter information in this grid. By default, the grid sorts by **Receipt Date** in ascending order. You can sort the grid by any column header by clicking and dragging the column header.

Reprint Receipt Screen

The **Next available Receipt number to use** is based on the next available receipt number for the receipt stack specified on the gift record.

If the number entered in the **Other** field is higher or lower than the next available receipt number for the specified receipt stack, a warning message appears to tell you so.
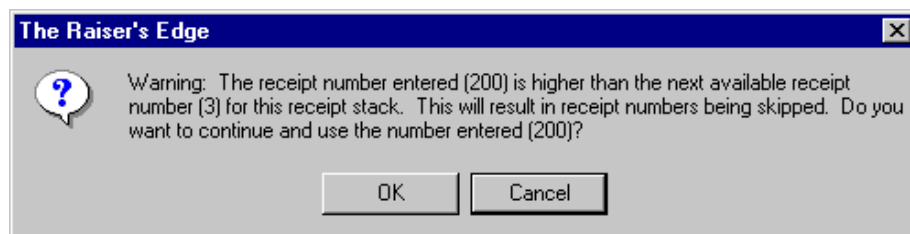
For more information about these warning messages, see "New Receipt Parameter Files" on page 9 or "Reprinting Receipts from Gift Records" on page 18.

Reprinting Custom Receipts

When you select a custom receipts parameter file from the Reprint Receipt screen, the **Printed Receipt Number** field is added at the end of the data file. (If you are not using Receipt Stacks, the field is labelled **Receipt Number**.)

In addition, the **Previous Receipt Amount**, **Previous Receipt Date**, and **Message to Print on Receipt** are added to the created data file. You can see this on the control report for the receipt export.
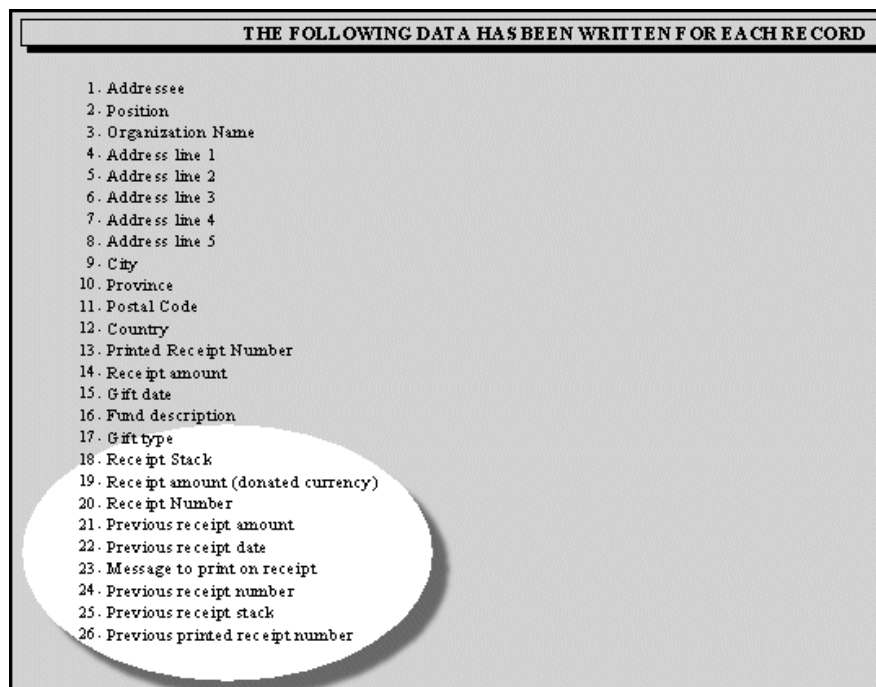
However, the following fields are added to the data file only if their corresponding fields are selected on the Fields to Include tab in the specified parameter file:

• **Previous Receipt Number** (only if **Receipt Number** is a selected field in the specified parameter file)

• **Previous Receipt Stack** (only if **Receipt Stack** is a selected field in the specified parameter file)

- **Previous Printed Receipt Number** (only if **Printed Receipt Number** is a selected field in the specified parameter file)

Reprinting Consolidated Receipts

A consolidated receipt is one receipt generated for several gifts. When you print a consolidated receipt, the program identifies all receipted gifts from the same constituent that have the same **Receipt Stack**, **Receipt number**, and **Receipt date**, and prints one consolidated receipt which represents all those gifts.

This consolidated receipt includes the constituent's other gifts with the same receipt number. The receipt information and history is updated for all gifts in the reprinted consolidated receipt.

Entering Receipt Stack Information on Receipts in Mail

The way you look at and use the **Receipt Stack** field on the General tab in the Receipts mail task depends on whether you enter your multiple receipt stack information on the gift record or in *Mail*.

If the **Receipt Stacks** code table in *Configuration* is empty, the **Receipt Stack** field and **Include Gifts with these receipt stacks** frame do not appear on the General tab in Receipts.

If you are not truly using multiple receipt stacks, you should not enter information in the **Receipt Stacks** code table or use the **Receipt Stack** fields on gift records and in *Mail*.

If you enter **Receipt Stack** information on the gift record, use the **Receipt Stack** field on the General tab of the Receipts mail task in *Mail* to select the receipt stack for which to run receipts. For example, you want to run receipts for all gifts with preprinted paper receipts entered in the **Receipt Stack** field on the Gift tab. On the General tab of the Receipts mail task, select preprinted paper receipt in the **Receipt Stack** field. In the **Include Gifts with these receipt stacks** frame, select the **Selected receipt stack only** option.

The program prints receipts for all gift records with the matching **Receipt Stack** selected on the Gift tab. If you want to define further parameters, such as only gifts given last week, preprinted paper receipts print for only gift records that fit all other parameters defined in the mail task. For more information about creating a Receipts mailing, see the *Mail Guide*.

When you use multiple receipt stacks, we strongly recommend you consistently record receipt stack information one of two ways: Consistently enter the receipt stack on the gift record when you enter a gift, or consistently enter the receipt stack in *Mail* when receipting. To avoid complications in receipting, do not vary the way you record receipt stack information. Choose one way and remain consistent.

You can choose to enter receipt stack information when you are create receipts in *Mail*, instead of on the gift record. If you track multiple receipt stack information in *Mail*, select a query when you click **Include** on the General tab of Receipts to define which gifts need receipts. In the **Receipt Stack** field, select the particular receipt stack to use to print receipts.

For example, you want to send email receipts to a group of donors who requested to receive receipts this way. Click **Include**, choose **Selected records**, and select the appropriate query. In the **Receipt Stack** field, select email receipt. When you run the Receipts mail task, the **Receipt Stack** defined on the General tab in *Mail* is entered in the **Receipt Stack** field on all gift records included in the mail run.

The option you select in the **Include Gifts with these receipt stacks** frame also affects which gifts are included and updated.

Include Gifts with Receipt Stacks

The **Include Gifts with these receipt stacks** frame is enabled only when you select a receipt stack in the **Receipt Stack** field on the General tab of Receipts. The **Include Gifts with these receipt stacks** frame includes three options that refer to the **Receipt Stack** field on the gift record.

Selected receipt stack or no receipt stack. To print receipts for a particular receipt stack or for gifts with nothing selected in the **Receipt stack** field on the Gift tab, select this option. In the **Receipt Stack** field on the General tab, select the receipt stack to use for this receipt run. The receipt run includes all gift records with the chosen receipt stack entered in the **Receipt Stack** field or with no receipt stack entered that meet all other parameters defined in the mailing.

Selected receipt stack only . To print receipts only for gifts with the same receipt stack entered in the **Receipt Stack** field as is selected in the **Receipt Stack** field on the General tab, select this option.

Any receipt stack. To print receipts for all gifts that meet the various parameters defined in the mail task, regardless of what is selected in the **Receipt Stack** field on the Gift tab of the gift record, select this option.

Receipt Report Mail Task

In the Receipt Report mail task, a **Receipt Stacks** button appears in the **Include these Receipts** frame on the General tab if there is at least one entry in the **Receipt Stacks** code table in *Configuration*. When you click **Receipt Stacks**, the Receipts to Include screen appears.

Select the receipt stacks on which to report, and define the starting and ending receipt numbers for each stack.

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*If you enter receipt stack information on the gift record, in the **Include Gifts with these receipt stacks** frame on the General tab of Receipts, we recommend you select either the first or second option. This is because you already defined the **Receipt Stack** on the gift record and should select particular receipt stacks to use when receipting in *Mail*, not just **Any receipt stack**.*

If information is entered on the Receipts to Include screen, the **Start receipt no.** and **End receipt no.** fields on the General tab do not contain information and are disabled. On the **Receipt Stacks** button, a red checkmark appears to indicate information exists on the Receipts to Include screen.

If the **Start receipt no.** and **End receipt no.** fields are empty and nothing is defined on the Receipts to Include screen, the Receipt Report shows all receipts from all receipt stacks.

If you track multiple receipt stack information, the first column of the Receipt Report, called **Receipt**, displays the **Printed Receipt Number** (a combination of **Receipt Stack ID** and **Receipt Number**), instead of just the **Receipt number**.

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