



Setting Up eReceipts

In the past eReceipts were sent by going to Mass Update from the navigation menu and selecting Journal Updates. From here you would select Receipts from the drop down menu. The Manage Receipts page will appear asking what you would like to do.

Manage Receipts

- Generate Receipts
- Void Receipts
- Replace Receipts

With the addition of our new correspondence feature, the location of the receipting feature has changed. You will no longer go to mass update, instead you will select on Communicate from the main menu and select on Create/Send Correspondence. Select Receipts from the category options.

Correspondence Categories	
Name	Description
↓ Thank You Letters	Letters recognizing and thanking donors for gifts
↓ Receipts	Mallings used for receipting and tax purposes
↓ General Mailings	Miscellaneous mailings, greetings, invitations, etc
↓ Email Templates	Email templates for Basic Mass Email, Adv Mass Email, and one-off emailing

To add your template to this category, select Add New PDF Template from the task box.

Tasks

- Add New PDF Template
- Add New Email Template
- Save Category
- Copy Items
- Move Items
- Find Item in List

This will bring you to the PDF Wizard. Name your template eReceipt in the template info section.

Template Info

Name

Description

Next, you will need to select your layout. The first five templates are basic templates that will be seen by all users. The sixth and possibly seventh template will be your custom templates. They will be set up as a two-copy receipt and will look like the template that you created and sent to our eCommerce department. If you have more than one custom receipt you will need to create two PDF Templates, one for each layout. Select to create one document per gift so that you can generate a receipt for each gift received.

Document Intent

When generating this document

Create one document per account

Create one document per gift

You will also need to check the box, "Generate an eTax Receipt for each gift."

Receipting Options

Generate an eTax Receipt for each gift *

* This will automatically treat your Document Intent as "one document for each gift"

Select Save and Finish at the bottom of the page or you can also go to the top of the screen and select Finish, step 6. This will take you back to your receipt category where you will see your new template. You are now ready to send your receipt.

For Sales Support:

877-4BERACHA (423-7224) Ext. 2

Solutions@Beracha.org

www.Beracha.org