Make Receipts

Speech	Cursor Actions
In the donations window under Mailing, you have the ability to assign receipt numbers to donations and simultaneously make receipts.	Show Donations window. Expand Mailings. Point to Make Receipts.
Make Receipts works much like a mail merge, using a template that generates tax receipts. Before beginning this process, ensure that you have a tax receipt template ready to use. If you do not have a tax receipt template, there are some standard tax receipt templates available on the Sumac website, which you can customize for your particular organization.	
In most cases you start this process by searching for all unreceipted donations.	
In the Search Type drop-down menu, choose Receipt Status. Click Unreceipted, then click Search.	Choose "Receipt Status" from Search Type drop-down menu. Point to "Unreceipted" radio button. Click Search.
Sumac shows all the donations that have not been receipted, and are not either cancelled or marked as non-receiptable.	Point to list of donations.
Next click Make Receipts. Sumac lets you know that all the records will be processed.	Click Make Receipts. click OK.
Sumac does some quick analysis, then presents a summary with receipts divided based on two criteria:	Show summary screen.
how donors want their receipts (annually or not) and	Point to annual receipt options.
whether or not this donation was part of a pledge. This comes in handy, because you may want to generate receipts for only one or two of these groups, but not all of them.	Point to created from a pledge options.
For this example, I will click to choose the donations that were "not created from a pledge" and "not annual receipt" These kinds of donations are typical one-off or initial gifts.	choose check box for "not created from a pledge" and "not annual receipt."
Click OK.	Click OK.
Sumac confirms that the receipt numbers will now be generated and saved to the database. Click OK.	Point to message. Click OK.
And Sumac confirms that the receipt numbers were assigned to the donations and successfully saved to the database. Click OK.	Point to message. Click OK.
Now Sumac needs you to specify a template for creating these tax receipts. If you have saved your tax receipt template in your database, you can select the set of templates you want Sumac to use, and click "Use Set."	Choose a Set from the drop-down menu, and point to "Use Set."

Alternatively, if you do not have your receipt template saved into the database, and instead have the template saved somewhere on your server or computer, click "Do Not Use Set," and Sumac will bring up a new window where you can click "Choose" and pick the template file from wherever you have it stored on your server or personal computer.	Click Do Not Use Set Click Choose Select Receipt Template
Click OK.	Click OK
Sumac then presents you with some final mail merge options for this batch of receipts:	
Multiple Files – If you are using an .rtf or .docx file for your receipt template, you can choose to merge all the receipts into a single output file, or into multiple files (a separate document for each receipt). Putting all the receipts in one file makes printing them much easier. But if you intend to email the receipts, then you need to put them in separate files. If you are using a PDF template, then you do not need to make a selection here. Sumac always merges PDF receipts into separate output files so that these receipts can be emailed to each donor.	Expand Multiple Files area to show Output Options window. Point to radio buttons.
PDF Encryption – If you are using PDF template, you should encrypt your receipts. This encryption option produces a receipt document that satisfies some countries' government regulations that require electronic receipts to be unchangeable. Note that if you are using an .rtf or .docx file for your receipt template, you do not need to use the PDF Encryption options.	Expand PDF Encryption area. Point to radio button.
Merge Output – Finally, specify where Sumac should put the receipts that it creates. You may have already set up a folder on your computer or office server where you will save tax receipts. In that case, find that folder and save the receipts there.	Click "Choose File" Go to Desktop. Select "Tax Receipts Folder" Click Save.
If you are saving the receipts to a single output file, you can put a check mark here to tell Sumac to open the receipt file for viewing immediately after it creates the receipts.	Point to "After merging, open …"
Since we are creating PDF receipts that will be saved to multiple output files, this option isn't appropriate, so I will just click OK.	Click OK
Sumac automatically prompts you to save a communication record for every contact you've just made receipts for. Sometimes, an organization will use a receipt template that has a thank you letter attached as well. In that situation, it's quite handy to be able to save a communication record when making receipts to indicate that the thank you letter was sent as well.	Show prompt for saving communications record. Point to Yes
Since the template we used in this example does not have a thank you letter attached, I will click No for now, and save the communication records later on when I send out the thank you letters.	Click No.

Sumac also asks if you wish to record that the donations have been acknowledged. If your organization uses the Acknowledged check box in donation records to mark that acknowledgement has been sent to the donor, you can click "Yes." If you are not using the Acknowledged check box, click No.	Point to Yes

Click No |
And you're done!	
The next time you search for unreceipted donations, none of these donations will appear.	Point to Searching area. Click Unreceipted in search area. Click Search.
If we go to the folder where I chose to save the receipts, we can see all the receipt documents saved here!	Minimize Sumac, open Receipts folder on desktop, point to receipt documents.
If you generated receipts for printing, you can open the saved file and see all your receipts ready to be printed and mailed.	
If you intend to email the receipts, use Sumac's Email Receipts command to do this.	
Check out more training videos to learn more about Sumac.	