Electronic Receipts for Donations
User Document
Sunergo Church Information Management System

The ability to send PDF receipts via email has been added to the gift receipting process in Sunergo. This enhancement strives to reduce cost and effort in distributing donation receipts and will work alongside the current method of printing and sending physical receipts. The method for entering gifts and posting batches will remain unchanged, all enhancements related to electronic receipts occur when creating receipts. This document will give an overview on the process of sending and monitoring electronic donation receipts successfully.

Getting Started

Before asking Sunergo to activate the new electronic receipting feature on your Church Information Management System, please take a moment to ensure the validity of the emails of congregant members who would like to receive electronic receipts.

If all contacts with email records would like to receive electronic receipts, contact Sunergo to automatically set all contacts to receiving electronic receipts. Otherwise, each contact will be handled individually. All emails will be sent from donotreply-ereceipts@sunergo.net.

Please refer to the categories outlined in the Contents below for instructions and frequently asked questions. All other inquiries can be made to support@sunergo.net.

Preview the subject and content of the receipt email by going to View Sample Email in the Receipt Menu in the Giving Menu.

Contents

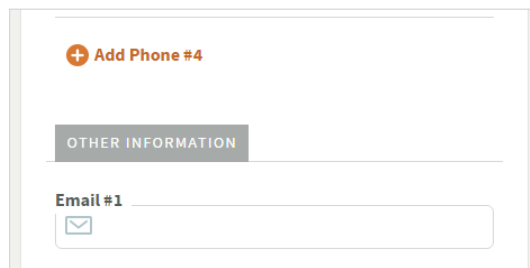# Setting Up Contacts to Receive Electronic Receipts

Controlling whether or not a contact receives their donation receipt through email happens on an individual basis. In order to receive a PDF receipt, the contact must have a valid email saved in the system and their preferred receipt type must be marked as Electronic.

1. Verify that the Email for a personal record or Email #1 for an Organization is correct.
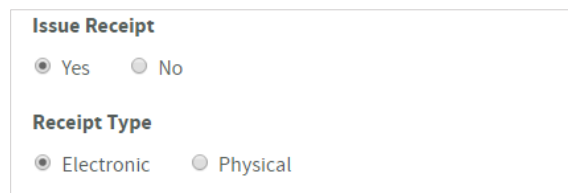
FIGURE 1 - EMAIL FIELD ON A PERSONAL CONTACT INFORMATION PAGE

FIGURE 2 - EMAIL FIELD ON AN ORGANIZATION CONTACT INFORMATION PAGE

2. Select Electronic as the Receipt Type. This field will remain disabled when there is no email saved for the contact.
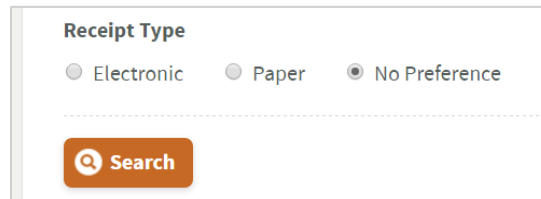

FIGURE 3 - RECEIPT TYPE SELECTION ON A CONTACT INFORMATION PAGE

3. To stop sending electronic receipts to a contact, simply switch Receipt Type back to Physical.

Creating a One-Time Electronic Receipt

The process of creating a one-time receipt will remain the same. However, on the confirmation page, there will be an additional button to Create Electronic Receipt for contacts with emails and receipt type marked as electronic. All gifts will have a Create Paper Receipt option.
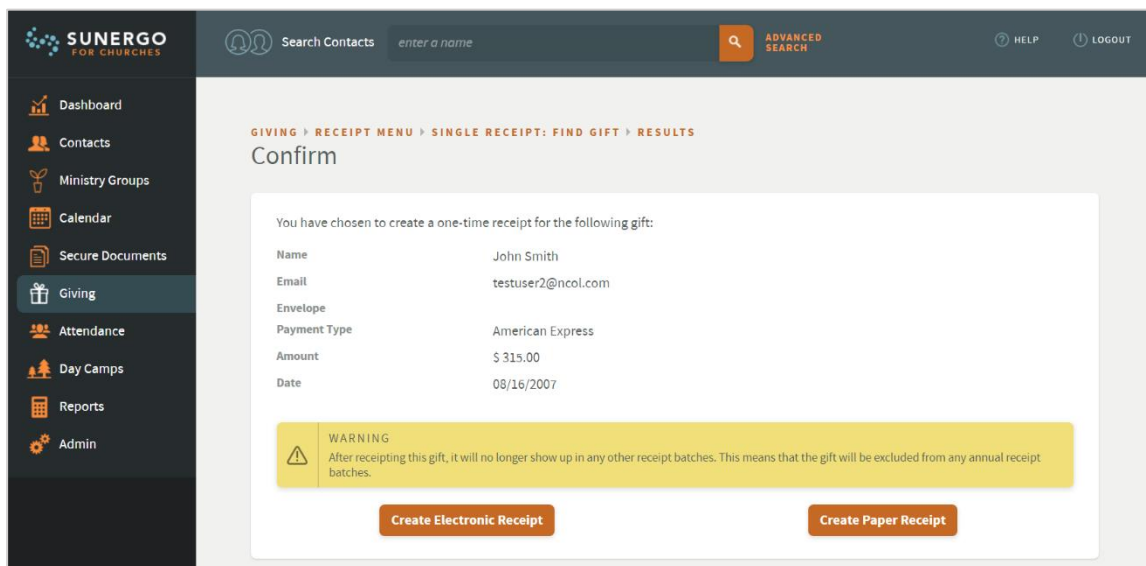
1. Proceed to the Giving Menu, then the Receipt Menu, then Create One-Time Receipts as normal.

2. When searching for a specific gift or receipt, there is now the option to search by Receipt Type. Click Search to return a list of all relevant gifts.

FIGURE 4 - SEARCH BY RECEIPT TYPE

3. If the gift has already been receipted, the Generate Receipt link will display the receipt instead of creating a new one. Otherwise the link will say Create.

4. If the contact associated with the selected gift has an email saved and has Electronic selected as their Receipt Type, a Create Electronic Receipt button will appear next to the Create Paper Receipt button. The Create Paper Receipt button will appear for all one-time receipts.

FIGURE 5 - MODIFIED CONFIRM CREATION OF ONE-TIME RECEIPT PAGE WITH ELECTRONIC RECEIPT OPTION

5. The receipt will be added to an email queue and the progress and success of this receipt can be monitored from the View E-Receipt Progress page from the View Issued Receipts option in the Receipts Menu. Click the View the Receipt button to view the created receipt.

> **Note:** *According to the CRA Computer-generated Receipts webpage, it says that "copies of email-issued receipts must be retained by the charity". Therefore, you may also want to print and keep a physical copy of this receipt.*

Creating an Annual Batch of Electronic Receipts

The functionality of entering gifts, posting batches, and then creating annual receipt batches will remain the same. However, it will now have to be done twice, once for all electronic receipts and once for all physical receipts.

1. Proceed to the Giving Menu, then the Receipt Menu, then Create Annual Receipts as normal.

2. After selecting the Date Range and Minimum Donor Giving Total, the system will display a list of names and receipt amounts to be generated. The results page now contains 2 tables instead of 1 and they are sorted with electronic receipts on the left and paper receipts on the right. If there are no receipts to be generated, it is likely because receipts have already been created for the date range. Since gifts can only be receipted once, the user should look through previously generated receipts.
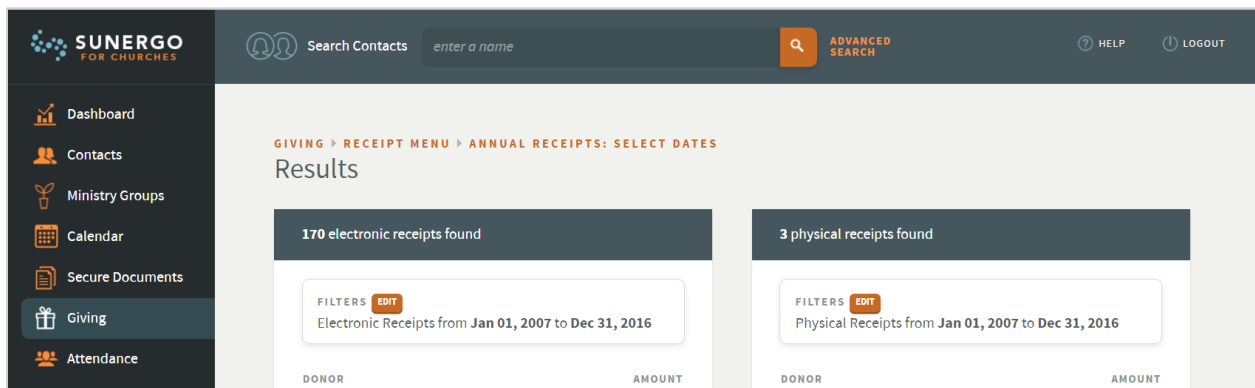

FIGURE 6 - MODIFIED ANNUAL RECEIPTS SEARCH RESULTS PAGE WITH ELECTRONIC RECEIPTS TABLE

3. Pressing the Continue button in the electronic receipts found table will proceed to generating only the amounts listed in that table, and the same will occur for the physical receipts found table.

4. The system will check there if are any batches that are not yet posted; if so, it will display a list of those batches. If the gifts in those open batches should be included in the receipts, first post the open batches (open the Batch Name links in a new tab/window) then start over at Step 1. When this step is submitted, the receipts will be created.

5. On this page, the number of receipts that have been created will be shown, along with instructions on printing, and an option of how many receipts to view per page. Click the View the Receipts button to view the created receipts. The receipts will be added to an email queue and the progress and success of these receipts can be monitored from the View E-Receipt Progress page from the View Issued Receipts option in the Receipts Menu.

> *Note: According to the* CRA Computer-generated Receipts *webpage, it says that "copies of email-issued receipts must be retained by the charity". Therefore, you may also want to print and keep a physical copy of these receipts.*

Verify and Monitor Delivery and Download Status

Because of the sensitivity of donation receipt information, it is important to verify the donor has received the email. Sunergo's Electronic Receipting system provides 2 checks for this purpose: the email has been sent successfully, the receipt has been downloaded.

1. Proceed to the Giving Menu, then the Receipt Menu, and select View Issued Receipts.

2. In the quick links section under the title of the page, select "View E-Receipt Progress"
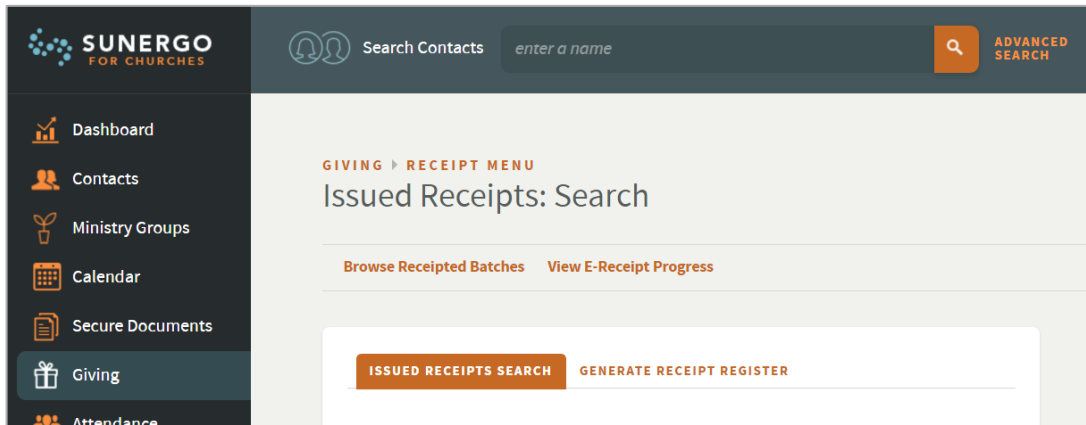
FIGURE 7 - VIEW ISSUED RECEIPTS PAGE INCLUDING VIEW E-RECEIPT PROGRESS LINK

3. On the Electronic Receipt Progress, all generated electronic receipts are presented. Find the receipt batch you are looking for by looking at the Batch ID, Batch Type, and Issued Date. All records are sorted with the most recently issued batch on top. When you have found the intended batch, select Details to view more specific progress information for the receipts in that batch. If all receipts in the batch have been cancelled, the link will be disabled. If all receipts in the batch have been emailed and downloaded at least once, the progress link will say Complete.

FIGURE 8 - E-RECEIPT PROGRESS PAGE SHOWING GENERATED BATCHES AND GENERAL INFORMATION

4. An electronic receipt is successful when the Email Status says Sent and there is at least one download. The Email Status column will also indicate if the email has not yet been sent (Pending), Cancelled, or if Delivery Failed. For each receipt, there are 2 options: View and Cancel. The View link will open the receipt in a new window. This action will be logged. Pressing the cancel link will change the receipt to display CANCELLED in red letters on the receipt and this will also appear on any downloaded copies after the receipt has been cancelled. The email to which the receipt was sent to can be seen under the donor's name in the Issued To column.

GIVING ▶ RECEIPT MENU ▶ ISSUED RECEIPTS: SEARCH ▶ ELECTRONIC RECEIPT PROGRESS

Detail

4 receipts found
Displaying 1 - 4

FILTERS EDIT
Batch ID is **2532**, Type is **Electronic**

ADDITIONAL FILTERS REFRESH
◉ View All   ○ Email Not Sent   ○ Not Yet Downloaded

RECEIPT #	ISSUED TO	DATE ISSUED	AMOUNT	EMAIL STATUS	# DOWNLOADS	RECEIPT ACTIONS
20170002	**Placeholder Test** (test@test.com)	01/18/2017	$ 5,013.32	Delivery Failed ⑦	0	**View** | **Cancel**
20170003	Jonathan Smith (testuser6@ncol.com)	01/18/2017	$ 5,957.26	Sent	1	**View** | **Resend** | **Cancel**
20170004	NCOL (karen@ncol.com)	01/18/2017	$ 10,000.00	Cancelled, Sent	0	**View**
20170005	Bob Smith (name@gmail.com)	01/18/2017	$ 5,078.00	Pending	0	**View** | **Cancel**

FIGURE 9 - AN EXAMPLE E-RECEIPT PROGRESS DETAIL PAGE

5. When an email has failed, the Email Status will switch to Delivery Failed. Hovering over the Delivery Failed link, a pop-up as shown in Figure 10, will appear citing the reason for the failure and a recommendation for possible next steps. The name of the person the receipt was Issued To will become a link to the person's contact record for easy access to verifying or changing their email.

Delivery Failed ⑦

Reason: spam-related
Please verify the email
for this contact is
correct and then cancel

FIGURE 10 - DELIVERY FAILED POP-UP HOVER LINK

Printing, Cancelling, and Re-sending Electronic Receipts

Using the View Issued Receipts tool, previously generated receipts may be printed or cancelled. For electronic receipting purposes, this can be especially useful if an email address needs to be changed, or if a paper version of an electronic receipt needs to be generated instead.

1. Proceed to the Giving Menu, then the Receipt Menu, and select View Issued Receipts.
2. There are three ways to search for a previously generated receipt:
   a. *Issued Receipts Search*: Very few changes have been added to this method. There is now an additional search field for Receipt Type, with the options: Electronic, Paper, or No Preference. Pressing Search will display all generated receipts that match the search criteria. There is now an additional column named Type which will indicate whether the receipt is Paper or Electronic.

GIVING ▸ RECEIPT MENU ▸ ISSUED RECEIPTS: SEARCH

Detail

20 receipts found
Displaying 1 - 20

FILTERS **EDIT**
Receipt Type is **Electronic**

RECEIPT #	ISSUED TO	ENVELOPE	TYPE	DATE ISSUED	AMOUNT	PRINT RECEIPT	CANCEL RECEIPT
2016061	Linda D		Electronic	01/05/2017	$ 15.00	Print	Cancel

FIGURE 11 - SEARCH FOR ISSUED RECEIPTS DETAILS PAGE EXAMPLE

This search method is most effective for finding a specific receipt if you know information such as Receipt Number, Envelope Number, Amount, Date Issued, Donor Name, or Receipt Type.

   b. *Browse Receipted Batches*: This method has remained mostly unchanged. Clicking on this link displays a list of all batches. You may choose to view or print the entire batch of receipts, or click on the details link to view the individual receipts in the selected batch. When viewing details, there is now a column named Type which will indicate whether the receipt is Paper or Electronic.

GIVING ▸ RECEIPT MENU ▸ ISSUED RECEIPTS: SEARCH

Browse Batches

119 batches found
Displaying 1 - 119

BATCH ID	BATCH TYPE	START DATE	END DATE	# OF RECEIPTS	TOTAL AMOUNT	LIST RECEIPTS	PRINT RECEIPTS	COMPILE ADDRESSES
63	Annual	01/01/2005	12/31/2005	14	$ 4,663.00	Details	Print	CSV XLS

FIGURE 12 - BROWSE FOR RECEIPTIED BATCHES PAGE EXAMPLE

This search method is most effective for finding or printing entire batches of receipts.

c. *View E-Receipt Progress*: This is a new method made specifically for monitoring the status of every electronic receipt sent. More detail into navigating and monitoring information from this section is covered in the Verify and Monitor Delivery and Download Status Section.
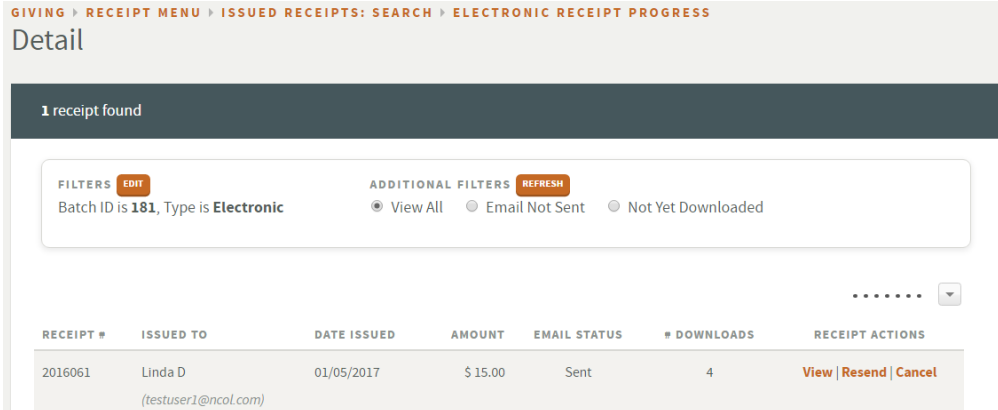

FIGURE 13 - VIEW ELECTRONIC RECEIPT PROGRESS PAGE EXAMPLE

This search method is most effective for finding recently generated electronic receipt batches.

Printing an Electronic Receipt

All Electronic Receipts should be printed after creating them for internal record-keeping, but additional copies can also be made after generation.

After finding the intended electronic receipt, both the View or Print link (depending on which method was used to find the record) will open the receipt in a new tab. This copy can be printed and handed to the donor if necessary.

> *Note: The best way to convert an electronic receipt into a paper receipt would be to first cancel the receipt then find the same record in the Create a One-Time Receipt tool and choose create a Physical receipt.*

Cancelling an Electronic Receipt

After finding the intended electronic receipt, view the receipt to verify that it is the correct receipt to cancel. Once verified, select cancel.

The system will prompt the user to confirm that the receipt is to be cancelled. Once OK has been selected, it cannot be undone.

The system will change the receipt to display CANCELLED on top in red letters. This also affects download links already sent to contacts, so when they download the receipt after it has been cancelled it will view as cancelled.

Re-Sending an Electronic Receipt

If a contact has not received an email and the system has marked the record as Sent, search for the record using the View E-Receipt Progress method. Selecting the Resend button will requeue the email for sending.

If the email was incorrect initially, updating the contact record and then clicking resend will resend the email to the new address.