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.
In this case, 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 then asks you to specify the next receipt number to this batch of receipts. Sumac looks in your database for the highest receipt number, then suggests the next highest number as the starting point for this batch of receipts.	Show receipt number window.
Usually you just click OK, to ensure consecutive numbering without any numbers being skipped or repeated.	Click OK.

Next choose your receipt template. We'll use a standard template for this example.	Select template from Desktop.
Choose whether you want Sumac to produce the receipts in one file, or in multiple files. 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.	Show Output Options window. Point to radio buttons.
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.	Expand PDF Encryption area. Point to radio button. Collapse area.
Click OK. Then, save the receipts on your computer.	Click OK. Save on desktop.
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.
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.
Once the receipts have successfully been saved, Sumac automatically updates the donation records to show that receipts have been generated for these donations.	Show dialogue windows.
So, next time you search for unreceipted donations, these donations will not appear.	Click Unreceipted in search area. Click Search.
If you generated receipts for printing, you can open the saved file and see all your receipts ready to be printed and mailed.	Close windows. Open file on desktop.
If you intend to email the receipts, use Sumac's Email Receipts command to do this.	Open Console. Click Donations. Expand Mailings. Point to Email Receipts.
Check out more training videos to learn more about Sumac.	