Receipting Guidelines for Australia & New Zealand

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What Is In This Guide?

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

- “Suggestions for Receipts” on page 4
- “Reprinting Receipts from Gift Records” on page 18
- “Duplicate Receipt Report” on page 27
- “Reprinting a previously issued receipt” on page 22
- “Receipting Using Multiple Receipt Stacks” on page 35
- “Entering Receipt Stack Information on Receipts in Mail” on page 44

How Do I Use These Guides?

*The Raiser’s Edge* 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.

 الاحت簡単ة

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

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Changes made to the reprinting receipts process in *The Raiser’s Edge*, including the ability to track multiple receipt stacks, appear 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 without duplicating receipt numbers. 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*, 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 a 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, Organise/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*.

### Frequently Used Terms

To effectively use receipts as part of your organisation’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. We recommend 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 receipt stacks, follow the guidelines in “Receipting Using Multiple Receipt Stacks” on page 35. See also the entry for “Receipt stack” on page 3.

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 the 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 organisation. 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 & Reprinting Receipts” on page 7. See also the entry for “Multiple receipt stacks” on page 3.

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 already 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. 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 4.
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 3.

Spoiled receipt. A spoiled receipt contains receipt or gift information that was incorrectly or illegibly entered. A spoiled receipt, for whatever reason, requires you to reprint the receipt.

### Issues with Conversions

Receipting changes for Australia and New Zealand appear in *The Raiser’s Edge* versions 7.5 and higher.

If you convert from *The Raiser’s Edge* versions 6.x or an earlier version of 7 to version 7.5 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 7.5 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.

### 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 or an earlier version of 7 to versions 7.5 or higher, the program runs through all gift records 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*. 

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For more information about using multiple receipt stacks, see “Receipting Using Multiple Receipt Stacks” on page 35.
• Print the receipt number on receipts. To avoid reuse of the same receipt number, we recommend you use paper receipts with the receipt number preprinted on them.

• 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 30/06/2007 and 01/07/2008”. We recommend 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 2.

• 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 & Reprinting Receipts

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## Procedures

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The receipting functions described in this chapter and the following chapter are available in *The Raiser’s Edge* versions 7.5 and higher.

## Printing Receipts in Mail

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, the 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 “262655”. 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 and enter 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.

### 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 select to print the receipts or close the preview window. If you select to print receipts from the Preview screen, a message appears to ask if all receipts printed correctly. If you select to close the preview screen, you see only a message that asks whether to mark the gifts as Receipted.

### Restarting a Receipt Run in Mail

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.
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 flowchart is a very basic depiction of the process of how to reprint receipts in Mail.

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**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 how to run receipts, see the Mail Guide.

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

   ![The Raiser's Edge](image)
2. Click No. The Restart Run screen appears.

![Restart Run Screen]

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

![Step 1 Grid]

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.

![Step 2 Grid]
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 Benefits

If the gift has a benefit value, you can print it, the total gift amount received, and the donation amount 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 benefits.

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.

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.

Reprint Receipt

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<th>Reissue</th>
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</thead>
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<td>Receipt history reason:</td>
<td>Donor lost receipt</td>
</tr>
<tr>
<td>Use this parameter file:</td>
<td>Paper Receipts</td>
</tr>
<tr>
<td>Receipt number to use:</td>
<td>Next available: 3</td>
</tr>
<tr>
<td></td>
<td>Same: 2</td>
</tr>
<tr>
<td></td>
<td>Other:</td>
</tr>
<tr>
<td>Message to print on receipt:</td>
<td>This is a reissue for receipt #2.</td>
</tr>
</tbody>
</table>

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 whatever terms your organisation uses to distinguish 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. All receipts must 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.

Receipt Field & Receipt History Screen

If a 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).

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 there is a printer problem when you initially print the receipts with the Receipts mail task in Mail, you can use the Restart Run screen to reprint the receipts. 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.
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

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.

You do not have to enter the receipt number in batch.
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 what 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.
Query & 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 under the Gift Receipt History category in Query and Export include: Receipt Amount, Receipt Date, 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 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**.

The **Receipt** column displays the **Receipt number**, if you are receiving 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.
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. The database check begins when you 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**. Click **Cancel** to close the screen without updating the receipt number. You return to the Business Rules page.

**VBA & 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

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In *The Raiser’s Edge* versions 7.5 and higher, you can use multiple receipt stacks to receipt gifts. If you work with multiple databases, have multiple offices, or receipt gifts multiple ways, such as through print, 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 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.
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.

<table>
<thead>
<tr>
<th>Receipt Stack</th>
<th>Next Available Receipt No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>(None)</td>
<td>5152001</td>
</tr>
<tr>
<td>email receipt</td>
<td>1</td>
</tr>
<tr>
<td>preprinted paper</td>
<td>103</td>
</tr>
<tr>
<td>blank paper receipt</td>
<td>1</td>
</tr>
<tr>
<td>receipts for Estate</td>
<td>1</td>
</tr>
<tr>
<td>receipts for home</td>
<td>1</td>
</tr>
</tbody>
</table>

Click the up arrow in the box to find the first available receipt number for that 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.

### 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 on 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, 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 do not use 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)
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 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 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 Reports 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.
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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