



Acknowledgement Letters

Multiple Acknowledgment Letters can be uploaded in to DonorSnap. As you enter donations, DonorSnap will want to print this Thank you/Tax Receipt letter.

Entering Donations

Add Donation

Donation Header:

Donation Date: 10/23/2019 Accounting Period:

Payment Method: -- N/A -- Reference #:

Batch Code: -- N/A -- Anonymous:

Donation Detail

Associated with P:

Am:

Value Rec:

Donation:

Campaign: -- N/A --

Appeal: -- N/A --

Accounting Code: -- N/A --

QBClass: -- N/A --

Comments:

Acknowledged:

Organization Contact E-Mail Sent: No

As you enter a donation, use the **Batch Code** field to tell the program WHICH LETTER to print. (populate the drop-down with the titles of your thank you letters by going to **Maintenance > Site Setup > Field & Screen Customization > DonorSnap Site Lookups**).

At the bottom of the page is an **Acknowledged** box. By default, this remains UNCHECKED, indicating that the donation is NOT yet acknowledged, triggering DonorSnap to remind you to print the acknowledgment letters. Once the program prints the Acknowledgement letter, it will check the "Acknowledged" box for you and record a date it was acknowledged.

To generate a thank you letter, leave the Acknowledge box Un-checked.

Note: For older donations you are entering or modifying, Yes, you can check the box manually indicating that the donation was already acknowledged.



Creating your Acknowledgment Letters in Word

You create your letters in Microsoft Word – with logo and images as you want; insert your Merge fields; upload in to the program. Create your letters in Word, download an Excel file out of DonorSnap to receive the fields available to merge with your letter, so the letter talks directly to DonorSnap.

Step One: Download the Excel Document to Create the Merge

1. Enter a donation (this can be a “fake” donation) to trigger the acknowledgement process.
2. **Processing > Documents and Labels > Donation Acknowledgement Letters** (or from the Dashboard, click the “Print Letters” from the Acknowledgement Letters pending app)

Acknowledgements Pending	Batch Code	Export Batch Data to Excel	Generate Batch Donation Acknowledgements with Selected Document	Mark Batch Records as Acknowledged
3	TY - General Donation	Excel	Generate	Flag Update
2	TY - Membership	Excel	Generate	Flag Update

3. Click **Excel** in the middle of the screen to download an excel spreadsheet of the information saved in the acknowledgement. ***Note: You only need to do this **ONCE**. Save this file to your computer and ALL FUTURE LETTERS can be merged to this same Excel file. You only need the field headers for this process, to insert your merge fields.

The Excel file available for merging in to your acknowledgment letters will include **All fields** on the **Donation** tab (Appeal code, Accounting Code, Comments, etc.) and **All Fields** on the **Contact** tab (address, email, and any user-defined fields such as Membership Expiration Date or Child’s Names). You can insert ANY of these fields in to your acknowledgement letter.

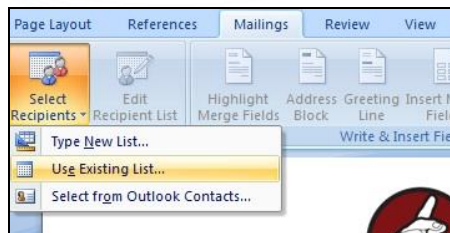
3. **Save** the Excel file on your computer (somewhere you can find it!). You will merge all your future letters to this file.

Step Two: Create your Merged Letter in Word

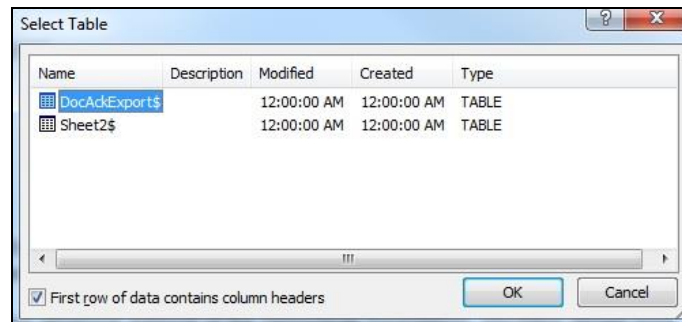
1. **Open** Microsoft Word and begin writing your letter. Insert your logos and fanciness as you see fit. You might want to give yourself some place holders for what information you want to merge...

“Thank you for your contribution of XX on XX”

2. Go to **Mailings**. Click **Select Recipients, Existing List**. Go find your Excel File.



When you pull in the report from DonorSnap, it will give you two sheets.



Choose the sheet that says DocAck. Click **OK**. (Nothing will happen, but your documents are now merged together).

3. Click the **Insert Merge Field** button – you will see the list of ALL the available fields (from both the Contact and Donation tabs) to insert into your letter.

Now you are ready to insert your merge fields. Place your cursor within the body of your letter where you want to insert a merge field. Choose the desired field from the **Insert Merge Field** button.

A few things to keep in mind:

- You are 100% in control of **what fields** you want to import in to your letter.
- Available fields include all the fields on both the Donation tab and the Contact tab – including User-Defined fields such as “membership type” and “Birthdate”
- “Labellines” will pull in Company name/ Acknowledgment / and Address lines – and will *squish* the lines together. A good option for Address Blocks.



DonorSnap

Donor Management Made Easy



Make sure to insert merged fields for **DonationAmountTEXT** and **DonationDateTEXT**.
The fields that end in "Text" are the most properly formatted for your letters.

Once all your fields have been merged into their proper place, **SAVE** your letter. Import your letter in to the program with all the merge fields included. **Do not "finish & merge", do not "preview results"**.

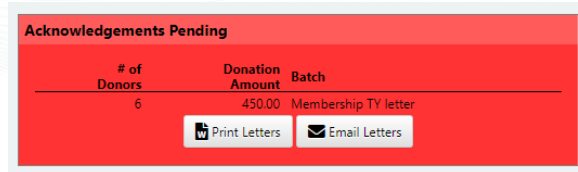
Upload your Letter under **Processing > Documents and Labels > Upload/Download/Delete**

****Note:** Although you can upload letters in (.doc) or (.docx) format, we recommend that you save your letters as "97-2003 Version" to ensure compatibility among all your users.

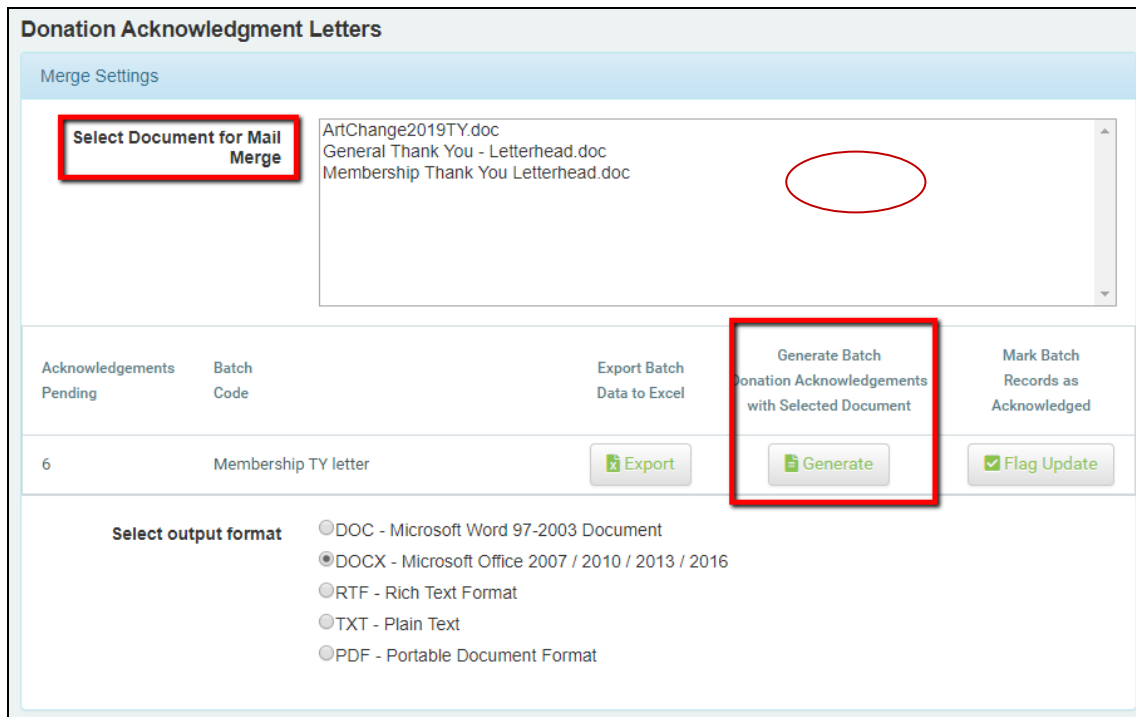
Step 3: Process Your Letters

Now that your letters are uploaded, you are ready to generate your Thank You letters.

The Dashboard will alert you that you have donations entered which have not been acknowledged.



1. Click the **Print Letters** button directly from the App. (or Processing > Documents and Labels > Donation Acknowledgement Letters)
2. Match the listing of **Batch Codes** with the appropriate letter, and click **Generate**.



This will export your letters to Microsoft Word, **where you can edit before Printing**.

Once you have printed the letters, click the **Flag Update** button. DonorSnap will now check the **“Acknowledged”** box on each donation and record a date the donation was Acknowledged.

The alert on the Dashboard will also be removed.