

# Send Acknowledgements

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A CharityEngine Training Document



Saying **Thank You** is easy. It's also the best part.

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The screenshot shows a web interface titled "Send Acknowledgement". At the top, there are radio buttons for "Process Now" (selected) and "Save to Batch", and "Email" (selected) and "Print". Below this is a dropdown menu showing "Old Rag - GivingTuesday Th...". There are also checkboxes for "Receipt" (selected), "Acknowledgement", and "mark transaction do not acknowledge".

Fields for email details include:  
Email Address: helentaft@anyoldeemail.c  
Email Subject: Thank You Helen!  
Email Display Name: Old Rag Donor Team  
Email Reply-To: info@oldragtrust.org

Below the fields is a Microsoft Word-style ribbon with menus for File, Edit, View, Insert, Format, and Table. The ribbon includes options for font (Verdana, 11pt), bold, italic, strikethrough, and paragraph formatting.

The main content area shows a preview of an email message with a photo of a child on a rocky trail. The text of the email reads:  
Dear Helen,  
This GivingTuesday, please know, you've made a difference.  
A Big difference!  
On behalf of everyone at the Old Rag Trust, thank you for your contribution of \$100.00 received on 11/5/2018 1:01:22 PM.  
We can't wait to see you on the mountain!  
Best,  
*[Signature]*

At the bottom right of the preview area are two buttons: "CLOSE" and "SEND EMAIL".

# Overview: Acknowledgements

With our new Acknowledgements Wizard, we've made it extremely easy to create, edit and duplicate acknowledgements and receipts, whether for email or print. The example below shows the wizard in action as well as a letter that can be created and edited directly in CharityEngine.

### Send Acknowledgement

Process Now  Save to Batch

Email  Print

Old Rag - GivingTuesday Th...

Receipt  Acknowledgement  mark transaction do not acknowledge

Email Address	Email Subject	Email Display Name	Email Reply-To
helentaft@anyoldeemail.c	Thank You Helen!	Old Rag Donor Team	info@oldragtrust.org

File - Edit - View - Insert - Format - Table -

Verdana - 11pt



Dear Helen,

This GivingTuesday, please know, you've made a difference.  
A Big difference!

On behalf of everyone at the Old Rag Trust, thank you for your contribution of \$100.00 received on 11/5/2018 1:01:22 PM.

We can't wait to see you on the mountain!

Best,



### Template — Old Rag Trust - General Acknowledgement from Word — 3514

General Message Content

File - Edit - View - Insert - Format - Table -

Helvetica - 12pt



^CURRENT DATETEXT^^

^^TRANSACTION.CUSTOMER FIRST NAME.CAPITALIZE FIRST LETTER^^ ^^TRANSACTION.LASTNAME (CAPITALIZE FIRST LETTER)^^  
^^TRANSACTION ADDRESS LINE 1 (CAPITALIZE FIRST LETTER)^^  
^^TRANSACTION CITY (CAPITALIZE FIRST LETTER)^^, ^^TRANSACTION.STATE^^ ^^TRANSACTION.CUSTOMER POSTAL CODE^^

Dear ^^TRANSACTION.CUSTOMER FIRST NAME.CAPITALIZE FIRST LETTER^^,

On behalf of everyone at the Old Rag Trust, thank you for your generosity in supporting this diamond of the Blue Ridge with your gift of  
^^TRANSACTION.TAXDEDUCTIBLE\_AMOUNT^^ made on ^^TRANSACTION.DATE^^.

Simply put, we could not do this without you.

Sincerely,

Eleanor Franklin  
Executive Director



# Import/Create Letter Templates (including from Word®)

You can create templates in the app or you can import anything you've built in Microsoft Word. **To import from Word, you have to name your template and Create the message first.** The Import Word option will appear under the Update button.

The image shows two screenshots from an application. The top screenshot is a message template editor window titled "Template — Old Rag Trust - General Acknowledgement from Word — 3514". It has a "CANCEL" button and an "UPDATE" button with a dropdown arrow. A callout box points to the "UPDATE" button, showing a menu with "Preview" and "Import Word" options. The editor contains a rich text area with a toolbar and a message body with merge fields like `^^CURRENT DATETEXT^^`, `^^TRANSACTION.CUSTOMER FIRST NAME.CAPITALIZE FIRST LETTER^^`, and `^^TRANSACTION.LASTNAME (CAPITALIZE FIRST LETTER)^^`. The bottom screenshot shows the "Design Templates" list in the app. It has a sidebar with "QUICK LINKS" including Pledges, Sustainers, Accounting, Campaigns, Events, Advocacy, Online, Design & Messages, and Mobile Pay. The "Design & Messages" section is expanded to show "Templates". The main area shows a table of templates with filters and a table of results.

NAME	CLASS	TYPE	FORMS	ACTIVE	CREATED	ACTIONS
Old Rag- GivingTuesday Thank you - From Eleanor	Custom	Receipt or Acknowledgment Message	1	Yes	11/5/2018	...
Old Rag- GivingTuesday Thank you - From Eleanor-With Conditional Content	Custom	Receipt or Acknowledgment Message	1	Yes	11/6/2018	...
Old Rag Trust - General Acknowledgement	Custom	Receipt or Acknowledgment Message	0	Yes	11/5/2018	...
Old Rag Trust - General Acknowledgement from Word	Custom	Receipt or Acknowledgment Message	0	Yes	11/5/2018	...

Where do you find the Message Templates?  
Look in Configuration under Design & Message > Templates

# How to add Merge Tokens

## Easily add Merge Tokens!



Select the Database Icon to view all of the available Merge Tokens. Click the ones you want to insert. (The selected ones will show as Green.) When you are done, click Insert Selected.

Template — Old Rag Trust - General Acknowledgement from Word — 3514

General Message Content

File Edit View Insert Format Table

Helvetica 12pt

Insert Media

Available Merge Tokens

search tokens...

- ACCPASSWORD
- CURRENT DATE**
- CURRENT DATE (MMM\_D, YYYY)
- CURRENT DATETEXT
- CURRENT DATETEXT (MMM\_D, YYYY)
- CURRENT DATETIME
- CURRENT DATETIME (MMM\_D, YYYY)
- DATETIME
- FIRSTNAME**
- FUNDRAISING URL
- FUNDRAISER - FIRST NAME
- FUNDRAISER - FULL NAME

CLOSE INSERT SELECTED

Dear ^CURRENT DATETEXT^

^TRANSACTION.CUSTOMER FIRST NAME.CAPITALIZE FIRST LETTER^ ^TRANSACTION.LASTNAME (CAPITALIZE FIRST LETTER)^

^TRANSACTION ADDRESS LINE 1 (CAPITALIZE FIRST LETTER)^

^TRANSACTION CITY (CAPITALIZE FIRST LETTER)^, ^TRANSACTION.STATE^ ^TRANSACTION.CUSTOMER POSTAL CODE^

Dear ^TRANSACTION.CUSTOMER FIRST NAME.CAPITALIZE FIRST LETTER^,

On behalf of everyone at the Old Rag Trust, thank you for your generosity in supporting this diamond of the Blue Ridge with your gift of ^TRANSACTION.TAXDEDUCTIBLE.AMOUNT^ made on ^TRANSACTION.DATE^.

Simply put, we could not do this without you.

Sincerely,

Eleanor Franklin  
Executive Director



## Easily validate Merge Tokens!

Click the Database Icon with the Check to validate your tokens to make sure the ones you have inserted are accurate. If they are green, they work! If they are red, they do not.

^CURRENT DATETEXT^

^TRANSACTION.CUSTOMER FIRST NAME.CAPITALIZE FIRST LETTER^ ^TRANSACTION.LASTNAME (CAPITALIZE FIRST LETTER)^

^TRANSACTION ADDRESS LINE 1 (CAPITALIZE FIRST LETTER)^

^TRANSACTION CITY (CAPITALIZE FIRST LETTER)^, ^TRANSACTION.STATE^ ^TRANSACTION.CUSTOMER POSTAL CODE^

Dear ^TRANSACTION.CUSTOMER FIRST NAME.CAPITALIZE FIRST LETTER^,

On behalf of everyone at the Old Rag Trust, thank you for your generosity in supporting this diamond of the Blue Ridge with your gift of ^TRANSACTION.TAXDEDUCTIBLE.AMOUNT^ made on ^TRANSACTION.DATE^.

# Getting Started: What's Different?

The screenshot shows a CRM interface for 'Transactions'. At the top, a message bar says 'Message: Click More to apply default filter views like Gift Acknowledgement and Review Pending Transactions to this screen'. Below this, there's a 'back Transactions' header and a 'More' button (callout 1) which has a dropdown menu with options: 'Mail Merge', 'Gift Acknowledgment View' (highlighted), 'Review Pending Transactions View', and 'Default View'. Below the header, there are 'ACTIVE FILTERS' for 'Date 11/01/2018 to 11/01/2018 11:59 PM'. A search bar is present. A 'Show' dropdown (callout 2) is set to 'All' and has a menu with options: 'All', 'Payments Only', 'Payments & Soft Credits', 'Reversals (refunds, chargebacks, etc.)', and 'Non-Payments'. Below the filters, there's a 'Sort by ID' dropdown (callout 3) with options: 'Confirm', 'Process', 'Acknowledge', and 'Delete'. The main table has columns: ID, CONTACT, TYPE, METHOD, AMOUNT, STATUS, LINKED, ATTRIBUTION, DATE, and ACTIONS. The first row shows a transaction for 'George Washington' with a 'STATUS' of 'PendingReceipts: 1' (callout 4). The 'ACTIONS' column for this row has a 'Manage' button (callout 5) with a dropdown menu: 'Manage', 'Charge', 'Acknowledge', 'Delete', 'Update Contact', and 'Reassign Contact'. At the bottom left, there's an 'Information' button (callout 6) with the ID '53025792'.

- (1) The More button now has **Commonly used Filters around Transactions** so you do not have to set up all of your filters when you want to do specific tasks. In this case, **Gift Acknowledgement View** will show you who needs to still be acknowledged for their Gifts. The first thing to do is select Gift Acknowledgment View.
- (2) This dropdown gives you quick control of **which types of Acknowledgments** you will be working with so you don't have to manually make these selections.
- (3) This **Batch Action button** makes it easy to do the desired action in bulk based on your desired tasks. Select Acknowledge if your goal for this task is to Acknowledge gifts.
- (4) Once an acknowledgement has been sent, either by Print or Email, you will have a **log of exactly what was sent** by clicking on that number. The image will include the individual's data, not just the tokens of the creative. If there are more than one sent, it will show all of them.
- (5) Now you can **Acknowledge an individual transaction** directly via the Manage button.
- (6) The Information button **shows what can and cannot be done** with that particular record.

# Sending an Individual Acknowledgement

If you are only sending a single acknowledgement or just want to do a one-off, go to the Actions button next to the Transaction you are going to acknowledge and select Acknowledge. That will start the Acknowledgement Wizard.

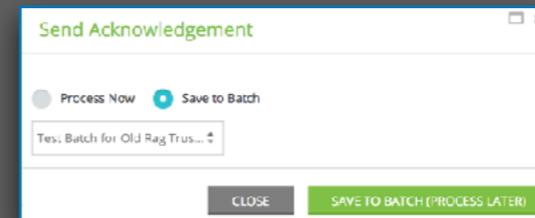
The screenshot shows a web application interface for managing transactions. At the top, there's a navigation bar with 'back Transactions', 'Create New', 'Advanced Filter', and 'More'. Below this is a search and filter section with a search box containing '53043284' and several dropdown menus for 'Show', 'Category', 'Payment Type', 'Payment Method', 'Payment Status', and 'Dates'. The main content is a table with columns: ID, CONTACT, TYPE, METHOD, AMOUNT, STATUS, LINKED, ATTRIBUTION, DATE, and ACTIONS. A transaction with ID 53043284 is highlighted. The 'ACTIONS' column for this transaction has a dropdown menu open, with 'Acknowledge' highlighted in green. A blue box with the text 'Start Here' and a blue arrow points to the 'Acknowledge' option. The table also shows a total amount of \$100.00 at the bottom.

ID	CONTACT	TYPE	METHOD	AMOUNT	STATUS	LINKED	ATTRIBUTION	DATE	ACTIONS
53043284	Terry Bathrobe 123 Plush Carpet St Frederick, MD 10023 United States	One Time	Check Check #: 435234664 Batch: 75602	\$100.00	Confirmed Receipts: 1	False	Form: Default Batch Template Category: Donation	11/5/2018	Manage Acknowledge Delete Update Contact Reassign Contact

# Sending an Individual Acknowledgement: Email

If you select **Process Now**, the email will send as soon as you click Send Email

## 1. Process Now or Save to Batch



If you **Save to Batch**, it will be added to an existing batch and processed as part of that batch's completion.

## 2. Select Email

## 3. Select Message

## 5. Add Email Display Info

**Send Acknowledgement**

Process Now  Save to Batch

Email  Print

Old Rag - GivingTuesday Th...

Receipt  Acknowledgement  mark transaction do not acknowledge

Email Address	Email Subject	Email Display Name	Email Reply-To
helentaft@anyoldeemail.c	Thank You Helen!	Old Rag Donor Team	info@oldragtrust.org

File Edit View Insert Format Table

← → B I S Verdana 11pt A A Paragraph



Dear Helen,

This GivingTuesday, please know, you've made a difference.  
A Big difference!

On behalf of everyone at the Old Rag Trust, thank you for your contribution of \$100.00 received on 11/5/2018 1:01:22 PM.

We can't wait to see you on the mountain!

Best,



## 4. Select Receipt or Acknowledgement

Selecting Receipt or Acknowledgement should follow your internal business rules.

## 6. Make edits to the individual message

the selected message will preview in the WYSIWYG editor. You can make additional edits in the editor as well.

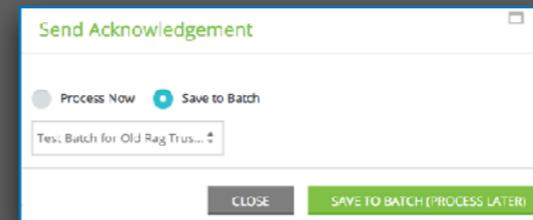
## 7. Send Email

The Send Email button will not appear at the bottom of this screen until these email fields are filled out.

# Sending an Individual Acknowledgement: Print

If you select **Process Now**, the letter will print as soon as you click Print.

## 1. Process Now or Save to Batch



Send Acknowledgement

Process Now  Save to Batch

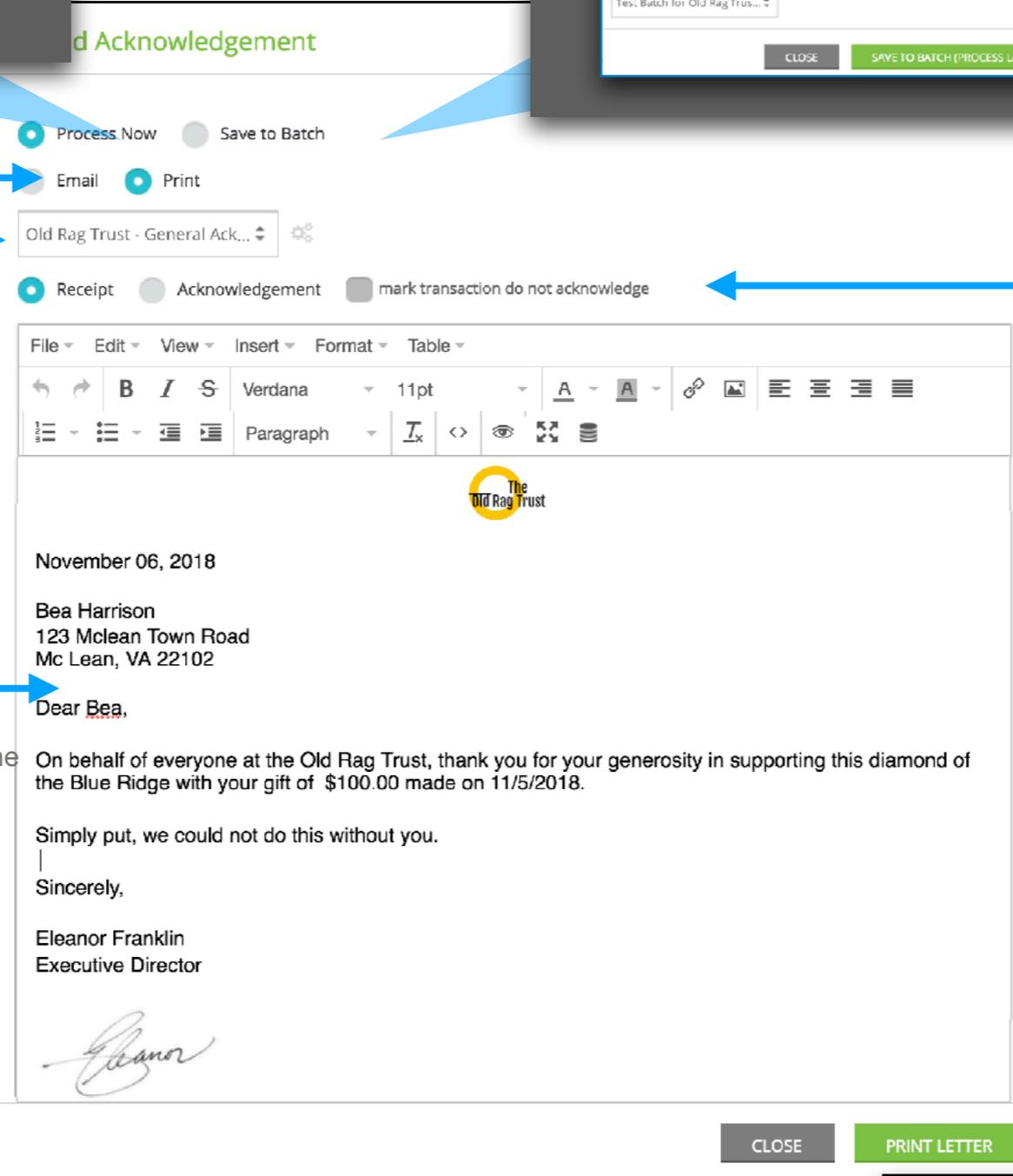
Test Batch for Old Rag Trus...

CLOSE SAVE TO BATCH (PROCESS LATER)

If you **Save to Batch**, it will be added to an existing batch and processed as part of that batch's completion.

## 2. Select Print

## 3. Select Message



Send Acknowledgement

Process Now  Save to Batch

Email  Print

Old Rag Trust - General Ack...

Receipt  Acknowledgement  mark transaction do not acknowledge

File Edit View Insert Format Table

Verdana 11pt

Paragraph

November 06, 2018

Bea Harrison  
123 Mclean Town Road  
Mc Lean, VA 22102

Dear Bea,

On behalf of everyone at the Old Rag Trust, thank you for your generosity in supporting this diamond of the Blue Ridge with your gift of \$100.00 made on 11/5/2018.

Simply put, we could not do this without you.

Sincerely,

Eleanor Franklin  
Executive Director

CLOSE PRINT LETTER

## 5. Make edits to the individual message

the selected message will preview in the WYSIWYG editor. You can make additional edits in the editor as well.

## 4. Select Receipt or Acknowledgement

Selecting Receipt or Acknowledgement should follow your internal business rules. You can also mark it to not be acknowledged.

## 6. Print Letter

Once you click Print Letter, a link will appear to download the letter.

Acknowledgement successfully processed. Click [here](#) to download letter.

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# Sending Multiple Acknowledgements

To send multiple acknowledgements at once, set your filters to create the segment you want to send to. Choosing Gift Acknowledgement View (1) will apply most of the common filters you'll want to use.

Once your filters are set, (2) either Select All or Select Individuals who will be receiving acknowledgements.

The screenshot shows a software interface for managing transactions. At the top, there is a message bar and a navigation bar with 'back Transactions', 'Create New', 'Advanced Filter', and 'More'. Below this, there are 'ACTIVE FILTERS' for 'Date: 11/01/2018' to '11/01/2018 11:59 PM'. A search bar is present with the text 'enter name, email, phone or id'. Below the search bar, there are dropdown menus for 'Show', 'Category', 'Payment Type', 'Payment Method', 'Payment Status', and 'Dates'. A 'Sort by ID' dropdown is also visible. The main area is a table with columns: ID, CONTACT, TYPE, METHOD, AMOUNT, STATUS, LINKED, ATTRIBUTION, DATE, and ACTIONS. The first row is highlighted, and a context menu is open over it, showing options: Confirm, Process, Acknowledge (highlighted with a green box and a '2' in a green circle), and Delete. A 'More' dropdown menu is also open, showing options: Mail Merge, Gift Acknowledgment View (highlighted with a green box and a '1' in a green circle), Review Pending Transactions View, and Default View. The table contains four rows of transaction data for different contacts: George Washington, Fred Footpath, Brenda Banana, and David Doorknob.

ID	CONTACT	TYPE	METHOD	AMOUNT	STATUS	LINKED	ATTRIBUTION	DATE	ACTIONS
	George Washington Mt Vernon Memorial Hwy Alexandria, VA 22314 United States leighkoss+gwashtington@gmail.com	One Time	Credit Card Mode: Charge Type: Visa Card #: 1111	\$25.00	PendingReceipts: 1	False	Form: Form-2018-11-01_125336 Category: Donation Fund: General Tribute: 1204050 Network: 64.129.142.2 ✓	11/1/2018	---
53043283	Fred Footpath 1235 Victory Lane Rockville, MD 20850 United States	One Time	Check Check #: 452452453 Batch: 75602	\$125.00	Confirmed	False	Form: Default Batch Template Category: Donation	11/5/2018	---
53043282	Brenda Banana 451 B Street New York, NY 10019 United States	One Time	Check Check #: 12342452345 Batch: 75602	\$50.00	Confirmed	False	Form: Default Batch Template Category: Donation	11/5/2018	---
53043281	David Doorknob 123 D Way Weston, MA 10023	One Time	Check Check #: 5245234524 Batch: 75602	\$100.00	Confirmed	False	Form: Default Batch Template Category: Donation	11/5/2018	---

The next few slides will show you more filters in the Advanced Filter tab that are available for you for your segmentation.

# Set your filters: General

Here are the common filters available for Segmentation Transactions in the **General Tab.**

The screenshot shows a filter interface with a tabbed menu at the top: 'General' (selected), 'Payment', 'Acknowledgement', 'Attribution', 'Events & P2P', and 'Advanced'. Below the tabs, there are 18 filter fields arranged in a grid:

- Contact: Search...
- Contact Type: Dropdown menu
- First Name: Text input
- City: Text input
- Country: Dropdown menu
- Pledge Type: Select option
- Membership Id: Text input
- Date: 11/06/2018 (with calendar icon)
- Region: Dropdown menu
- Last Name: Text input
- State: Dropdown menu
- Form Id: Search...
- Sustainer Id: Text input
- Membership Type: Select option
- to: 11/06/2018 11:59 PM (with calendar icon)
- Email: Text input
- Company Name: Text input
- Postal Code: Text input
- Pledge Id: Text input
- Sustainer Type: Select option
- Invoice Id: Text input

At the bottom right of the filter area, there are two buttons: 'CLEAR' (grey) and 'APPLY' (teal).

# Set your filters: Payment

Here are the common filters available for Segmentation Transactions in the **Payment Tab.**

The screenshot displays a filter interface for the Payment tab, organized into several columns. The tabs at the top are General, Payment (selected), Acknowledgement, Attribution, Events & P2P, and Advanced.

- Amount:** Min \$ [input] Max \$ [input]
- Currency:** [dropdown]
- Accounting:** [dropdown]
- Payment Class:** [dropdown]
- Payment Mode:** [dropdown]
- GL Code:** Select option [dropdown]
- Fund:** Select option [dropdown]
- Deposit Id:** [input]
- In-Kind:** [dropdown]
- Check Number:** [input]
- Card Type:** [dropdown]
- Credit Card:** enter last four digits [input]
- Account Number:** enter last four digits [input]
- Routing Number:** enter last four digits [input]
- Batch Id:** Search... [input]
- Batch Date:** [input] [calendar icon]
- to:** [input] [calendar icon]
- Response:** Select option [dropdown]

On the right side, there are several toggle filters:

- Processed: [yes] [X] [no]
- Show Auths: [yes] [X] [no]
- Show Voided: [checked] yes [checked] no
- Show Refunded: [checked] yes [checked] no
- Show Voids: [yes] [X] [no]
- Show Credits: [yes] [X] [no]
- Show Refunds: [yes] [X] [no]
- Show Chargebacks: [yes] [X] [no]
- Show Returns: [yes] [X] [no]
- Show Settled: [checked] yes [checked] no
- CC/ACH Info: [checked] yes [checked] no

At the bottom right, there are two buttons: CLEAR and APPLY.

# Set your filters: Acknowledgement

Here are the common filters available for Segmentation Transactions in the **Acknowledgements Tab.**

The screenshot shows a filter configuration interface with the following elements:

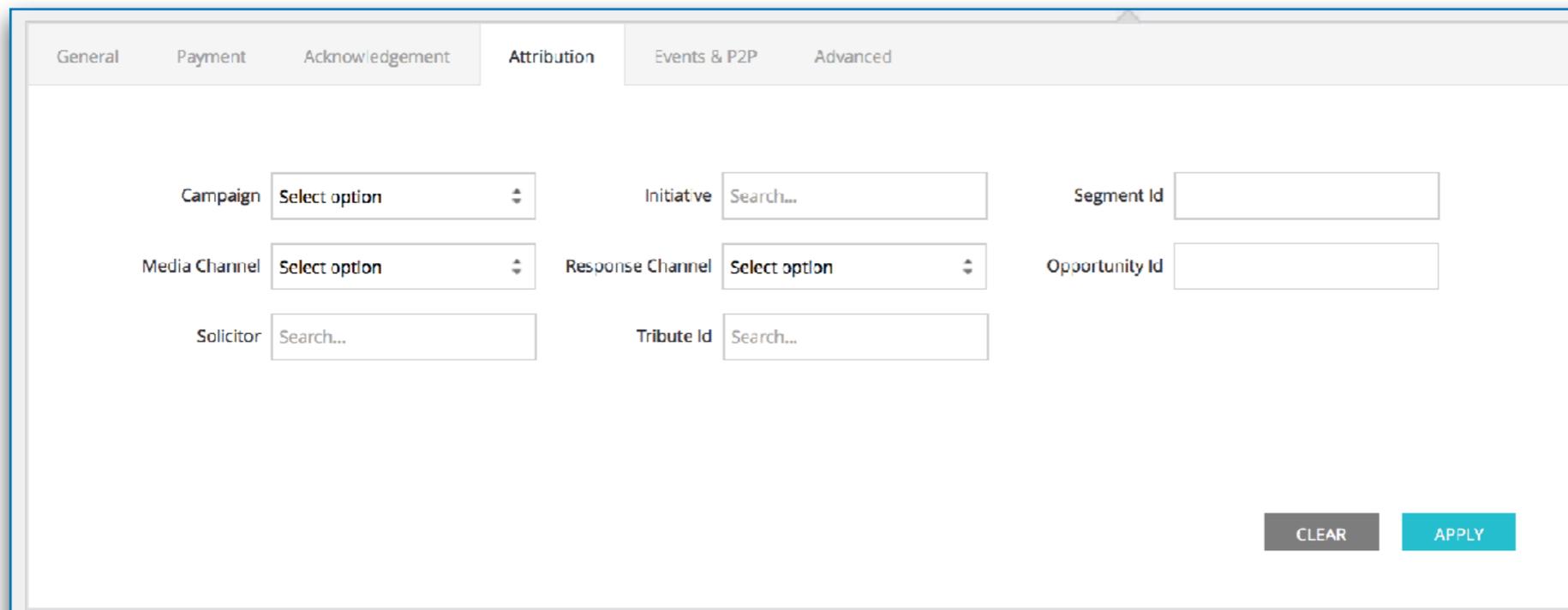
- Navigation tabs: General, Payment, **Acknowledgement**, Attribution, Events & P2P, Advanced.
- Left side: A "Show" dropdown menu and an "Ack. Batch" input field with the placeholder text "Enter Acknowledgement Batch |".
- Right side: A vertical list of six filter controls, each with a "yes" and "no" radio button:
  - Received
  - Acknowledged
  - Has Email
  - Has Address
  - Don't Receipt
  - Don't Acknowledge
- Bottom right: "CLEAR" and "APPLY" buttons.

Important!

The **Has Email** and **Has Address** filters are helpful in pulling out individuals who would not be able to receive that type of acknowledgment.

# Set your filters: Attribution

Here are the common filters available for Segmentation Transactions in the **Attribution Tab**.



The screenshot shows a software interface with a tabbed menu at the top: General, Payment, Acknowledgement, Attribution (selected), Events & P2P, and Advanced. Below the tabs, there are several filter fields:

- Campaign:** A dropdown menu with "Select option" and a downward arrow.
- Initiative:** A search input field with "Search..." placeholder text.
- Segment Id:** A text input field.
- Media Channel:** A dropdown menu with "Select option" and a downward arrow.
- Response Channel:** A dropdown menu with "Select option" and a downward arrow.
- Opportunity Id:** A text input field.
- Solicitor:** A search input field with "Search..." placeholder text.
- Tribute Id:** A search input field with "Search..." placeholder text.

At the bottom right of the filter area, there are two buttons: a grey "CLEAR" button and a teal "APPLY" button.

Three important filters here are **Campaigns** and **Initiatives**, as you may have specific communications for individuals who gave per a specific message, and **Solicitor**, if you'd like to pull a segmentation based on the Solicitor/Account Owner.

# Set your filters: Events & P2P

Here are the common filters available for Segmentation Transactions in the **Events & P2P Tab.**

The screenshot shows a filter configuration interface with the following elements:

- Navigation Tabs:** General, Payment, Acknowledgement, Attribution, **Events & P2P** (active), Advanced.
- Event Type:** A dropdown menu with the text "Select option" and a double-headed arrow icon.
- Event:** A search input field with the placeholder text "Search...".
- Grassroots Event:** A search input field with the placeholder text "Search...".
- Team Page:** A search input field with the placeholder text "Search...".
- Microsite:** A search input field with the placeholder text "Search...".
- Personal Page:** A search input field with the placeholder text "Search...".
- Grassroots Event Toggle:** A toggle switch with "yes" and "no" options. The "no" option is currently selected, indicated by an 'x' icon.
- Buttons:** "CLEAR" (grey) and "APPLY" (teal) buttons located at the bottom right of the filter area.

# Set your filters: Advanced

Here are the common filters available for Segmentation Transactions in the **Advanced Tab.**

The screenshot shows a web interface with a tabbed menu at the top: General, Payment, Acknowledgement, Attribution, Events & P2P, and Advanced. The Advanced tab is selected. Below the tabs, there are several filter controls:

- Browser:** A dropdown menu.
- Alt. View:** A search input field with the placeholder text "Search...".
- Promo:** A search input field with the placeholder text "Search...".
- IP Address:** A text input field.
- Merchant Gateway:** A dropdown menu.
- Import Job Id:** A search input field with the placeholder text "Search...".
- Yes No:** A section with three toggle switches: "Fraud", "IP Blacklist", and "Email Blacklist". Each toggle has "yes" and "no" options, with a central "X" icon. The "no" option is selected for all three.

At the bottom right of the form, there are two buttons: "CLEAR" (grey) and "APPLY" (teal).

You will likely not use this tab for segmentation other than possibly for Import Job ID.

# Set your filters: Save as Report

Message: Click More to apply default filter views like Gift Acknowledgement and Review Pending Transactions to this screen

## Transactions

ACTIVE FILTERS: Date 11/01/2018 to 11/01/2018 11:59 PM, Attribution, Events & P2P

Search: enter name, email, phone or id \* Show: All Category: Payment Type: P

Browser: IP Address: PAYMENT

Sort by ID ↓

ID	Alt. View	Search...	TYPE	Merchant Gateway	AMOUNT
3	Confirm	George Washington	One Time	Credit Card	\$25.00
	Process	Mt Vernon Memorial Hwy		Mode: Charge	
	Acknowledge	Alexandria, VA 22314		Type: Visa	
	Delete	United States		Card #: 1111	
		leighkess+gwashington@gmail.com			

ACTIVE FILTERS: Date 11/06/2018 to 11/06/2018 11:59 PM

Search: enter name, email, phone or id \* Show: All Category: P

### Save Report

Open existing custom report...

Report name: My Report

Columns to export: Id, Date Created, Amount, Confirmed, Refunded, Payment Type, Payment Method

Reorder Columns (drag & drop)

SAVE

SAVE & EXPORT NOW

EXPORT NOW WITHOUT SAVING

# Select Acknowledgees, then Click Acknowledge.

The screenshot shows a web application interface for managing transactions. At the top, there are navigation links and a 'Create New' button. Below that, there are active filters for date (01/01/2018 to 11/06/2018 11:59 PM), acknowledged status (no), and don't acknowledge status (no). A search bar is available, and there are dropdown menus for 'Show' (Payments & Soft Credits), 'Category', 'Payment Type', 'Payment Method', 'Payment Status' (Paid), and 'Dates' (Year to Date). A 'Sort by ID' dropdown is also present. The main content is a table of payment records. The first row is highlighted with a green box, and a green box with the number '3' points to the 'Acknowledge' button in the 'ACTIONS' column. The table has columns for ID, CONTACT, TYPE, METHOD, AMOUNT, STATUS, LINKED, ATTRIBUTION, DATE, and ACTIONS. The data rows show transactions for various contacts, all with a status of 'Confirmed' and a date of 11/5/2018.

ID	CONTACT	TYPE	METHOD	AMOUNT	STATUS	LINKED	ATTRIBUTION	DATE	ACTIONS
53043283	John Bathrobe 12345 Bush Carpet St Frederick, MD 10023 United States	One Time	Check Check #: 435234664 Batch: 75602	\$100.00	Confirmed	False	Form: Default Batch Template Category: Donation	11/5/2018	***
53043283	Fred Footpath 1235 Victory Lane Rockville, MD 20850 United States	One Time	Check Check #: 452452453 Batch: 75602	\$125.00	Confirmed	False	Form: Default Batch Template Category: Donation	11/5/2018	***
53043282	Brenda Banana 451 B Street New York, NY 10019 United States	One Time	Check Check #: 12342452345 Batch: 75602	\$50.00	Confirmed	False	Form: Default Batch Template Category: Donation	11/5/2018	***
53043281	David Doorknob 123 D Way Weston, MA 10023	One Time	Check Check #: 5245234524 Batch: 75602	\$100.00	Confirmed	False	Form: Default Batch Template Category: Donation	11/5/2018	***

(1) Once you have set up your filters as desired, and have used the checkboxes on the left (3) to select who you are targeting, **Click Acknowledge.**

# Selecting which Acknowledgement to send

In this first screen you will (1) name this Transaction batch (or use an existing one), (2) select/create the message you will be sending, and then (3) select the delivery method (Print or Email) .

**Important - the term Batch here refers to your batch of acknowledgements, not transactions entered in a Batch entry.**  
While those acknowledgements may be from transactions that were entered as a batch entry, this use of Batch is NOT the same thing.

Apply this to an existing batch or create a new one\*

\* If you select an existing batch, you will go to the next screen since these fields were already selected.

This is based on your organization's business rules as to how you log whether these are completed.

Select/Create your Email/Print Acknowledgement Template and which method you will be using.

This is if you are sending these as Emails. If you select Print, these fields will automatically be removed.

## Process Transaction Acknowledgements

Choose batch processing option below and click next to continue

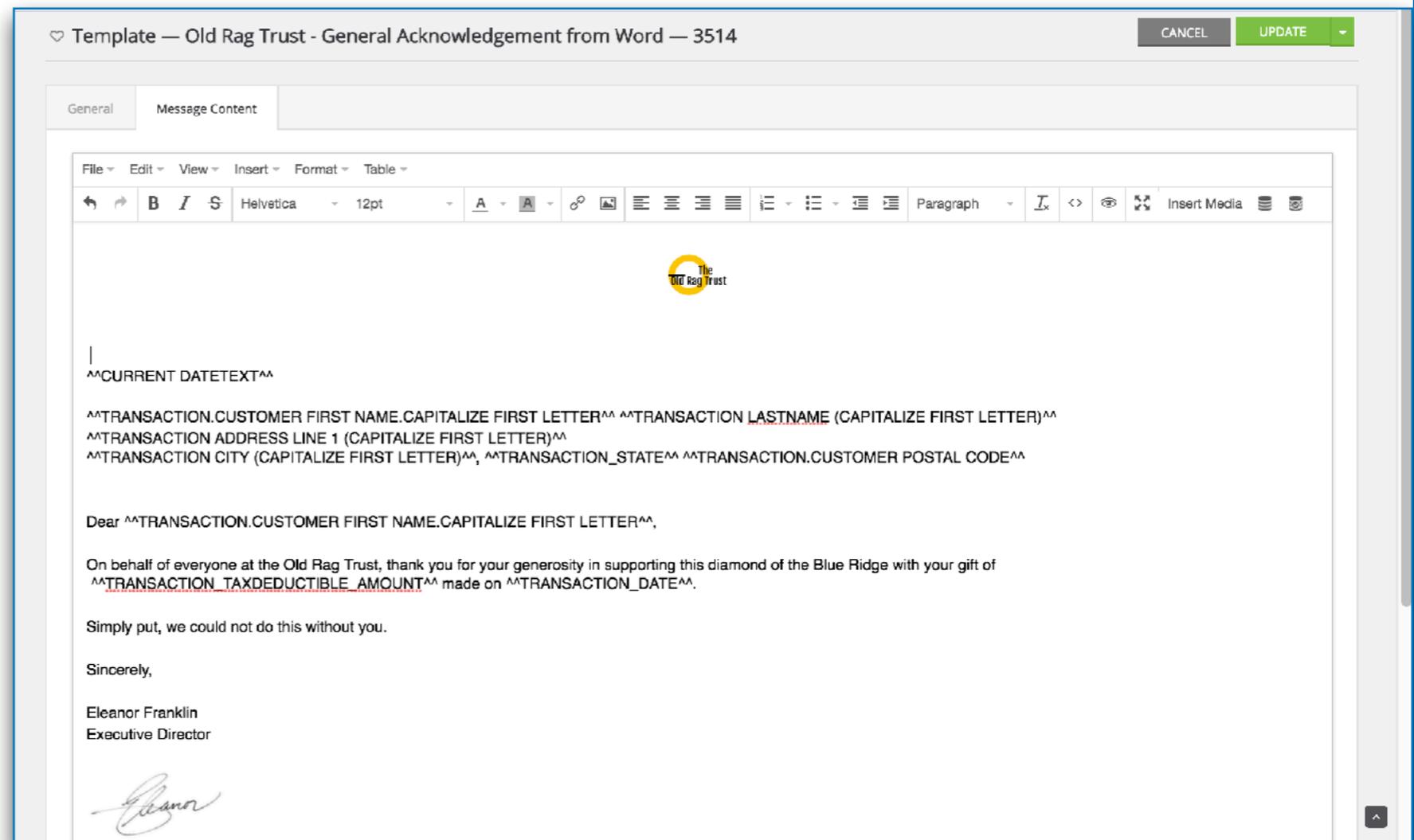
1	Batch	- Create New Batch (proces... ▾	Giving Tuesday - Over 1000
	Type	<input checked="" type="radio"/> Receipt	<input type="radio"/> Acknowledgement
	Message Template	Old Rag Trust - General Ack... ▾	⚙️ 2
	Delivery Method	<input checked="" type="radio"/> Email	<input type="radio"/> Print 3
	Email Subject	Your Giving Tuesday Gift!	
	Email Sender Name	Giving Team at ORT	
	Email Reply-To	finance@oldragtrust.org	

# Creating/Editing Your Acknowledgement

You can edit your acknowledgements for Email Messages or Print Messages directly in CharityEngine using the WYSIWYG editor.

For Tips on Using Our  
WYSIWYG editors,  
click the button below

Download the  
Create Forms Training  
Document



The screenshot shows a WYSIWYG editor interface for a template titled "Template — Old Rag Trust - General Acknowledgement from Word — 3514". The editor has a "Message Content" tab selected. The content area displays a letter template with the following text:

^CURRENT DATETEXT^

^TRANSACTION.CUSTOMER FIRST NAME.CAPITALIZE FIRST LETTER^ ^TRANSACTION\_LASTNAME (CAPITALIZE FIRST LETTER)^  
^TRANSACTION ADDRESS LINE 1 (CAPITALIZE FIRST LETTER)^  
^TRANSACTION CITY (CAPITALIZE FIRST LETTER)^, ^TRANSACTION\_STATE^ ^TRANSACTION.CUSTOMER POSTAL CODE^

Dear ^TRANSACTION.CUSTOMER FIRST NAME.CAPITALIZE FIRST LETTER^,

On behalf of everyone at the Old Rag Trust, thank you for your generosity in supporting this diamond of the Blue Ridge with your gift of  
^TRANSACTION\_TAXDEDUCTIBLE\_AMOUNT^ made on ^TRANSACTION\_DATE^.

Simply put, we could not do this without you.

Sincerely,

Eleanor Franklin  
Executive Director

The screenshot also shows a signature of Eleanor Franklin at the bottom of the letter. The editor's toolbar includes options for undo, redo, bold, italic, strikethrough, font face (Helvetica), font size (12pt), text color, background color, link, unlink, bulleted list, numbered list, indent, paragraph style, link, unlink, and insert media.

[Return to Table of Contents](#)

# Reviewing Each Acknowledgement

◀ viewing 3 of 10 ▶

As you go through, you can review each acknowledgement individually and make unique edits to each one including:

Review by Transaction ID

Change Message PER Individual

Make edits to the text for each individual

**Process Transaction Acknowledgements**

Review & customize messages or click next to continue

Transactions

Change Message

◀ viewing 3 of 10 ▶

File - Edit - View - Insert - Format - Table -

↩ ↪ **B** *I* ~~S~~ Helvetica - 12pt - A - ~~A~~ - Paragraph - *Ix* <>



November 06, 2018

**Brenda Banana**  
451 B Street  
New York, NY 10019

Dear Brenda,

On behalf of everyone at the Old Rag Trust, thank you for your generosity in supporting this diamond of the Blue Ridge with your gift of \$50.00 made on 11/5/2018

Simply put, we could not do this without you.

Sincerely,

[BACK](#) [NEXT](#)

# Process Now or Later?

After confirming Acknowledgements, you can finish it Now or Save to do Later? If you select Email, and Process now, emails will be sent right away. If you select Print, it will Create A Word Doc.

CharityEngine

Search Everything ...

CHARLES HARRISON  
CHARITYENGINE DEMO

back Transactions

Create New Advanced Filter More

Process Transaction Acknowledgements

Review & Click Process to Finish

Process Now  Save & Process Later

Batch Giving Tuesday - Over 1000 (87)

Transaction Count 10

Message Template Old Rag Trust - General Acknowledgement from Word

Delivery Method Print

BACK PROCESS CLOSE

DATE	ACTIONS
11/5/2018	...
11/5/2018	...

1235 Victory Lane	Time	Check #: 452452453	Template					
Rockville, MD 20850		Batch: 75602	Category: Donation					
United States								
📍								
53043282	One	Check	\$50.00	Confirmed	False	Form: Default Batch	11/5/2018	...
53043282	Time	Check #:				Template		
451 B Street						Category		
New York, NY 10019		12342452345						

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# Addresses and Letters

Once the Acknowledgements are processed, go to the Acknowledgements Tab in Donations/ Transactions. Next to the batch you ran, go to the Action Buttons. You will be able to download the letters in that batch as well as download a File of Ready-to-mail-merge address data.

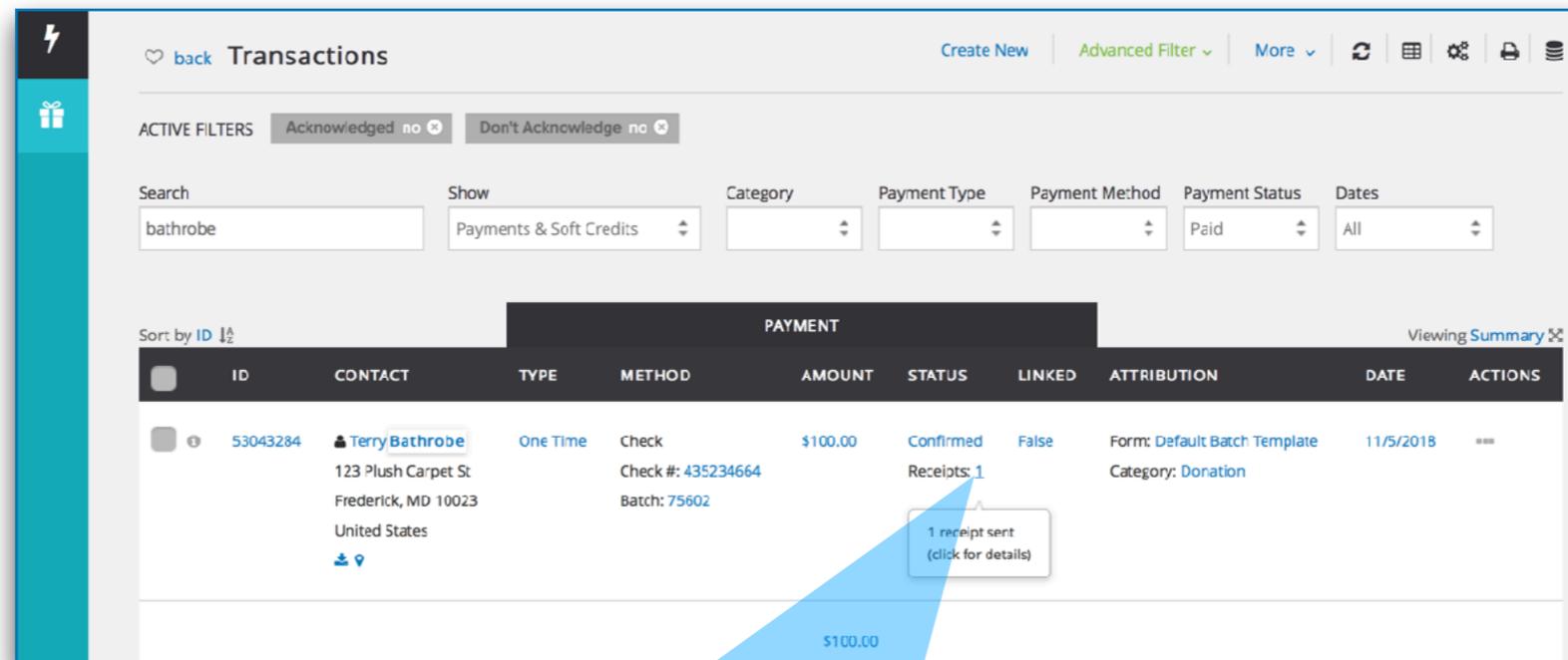
The screenshot shows the 'Acknowledgment Batches' interface. On the left is a sidebar with 'Donations' selected. The main area has search filters (Search: 82, Show: all, Type: [dropdown], Delivery: [dropdown], Status: [dropdown], Dates: All) and a table. The table has columns: DETAILS, TYPE, METHOD, STATUS, TRANSACTIONS, DATE, and ACTIONS. The first row shows: Id: 82, Name: Old Rag Trust Batch v2, User: Charles Harrison, Type: Receipt, Method: Mail, Status: Processed, Process Date: 11/5/2018, Transactions: 6, Date: 11/5/2018. A dropdown menu is open for the ACTIONS column, showing: Manage, Generate Letters, Export Addresses, and Transactions.

Upon exporting addresses, you will receive a file with the following Envelope Printing Fields in matching order to the letter generation.

Contact Name	Formal Salutation	Informal Salutation	Other Salutation	Street 1	Street 2	City	State	State Code	Postal Code	Country	Country Code
Judith Little	Judith Little	Judy		17 Harding St		Manchester	Pennsylvania	PA	17345	United States	US
Walter Adams	Dr. Walter Adams Ph.D.	Walter	Walt	410 Terrapin Drive		Bethesda	Maryland	MD	20810	United States	US
Charles Harrison	Charles	Chet	Chuck	123 E 75th St.	APT 8C	NEW YORK	New York	NY	10021-2853	United States	US
Chris Brant	Mr. Chris Brant	Chris		8200 Greensboro Dr.	Ste 1500	McLean	Virginia	VA	22102	United States	US
Beatrice Harrison	Beatrice	Bea		1776 Rockville Pike		Rockville	Maryland	MD	20852	United States	US
Ted Williams	Mr. Ted Williams	Ted		4 Yawkey Way		Boston	Massachusetts	MA	2215	United States	US

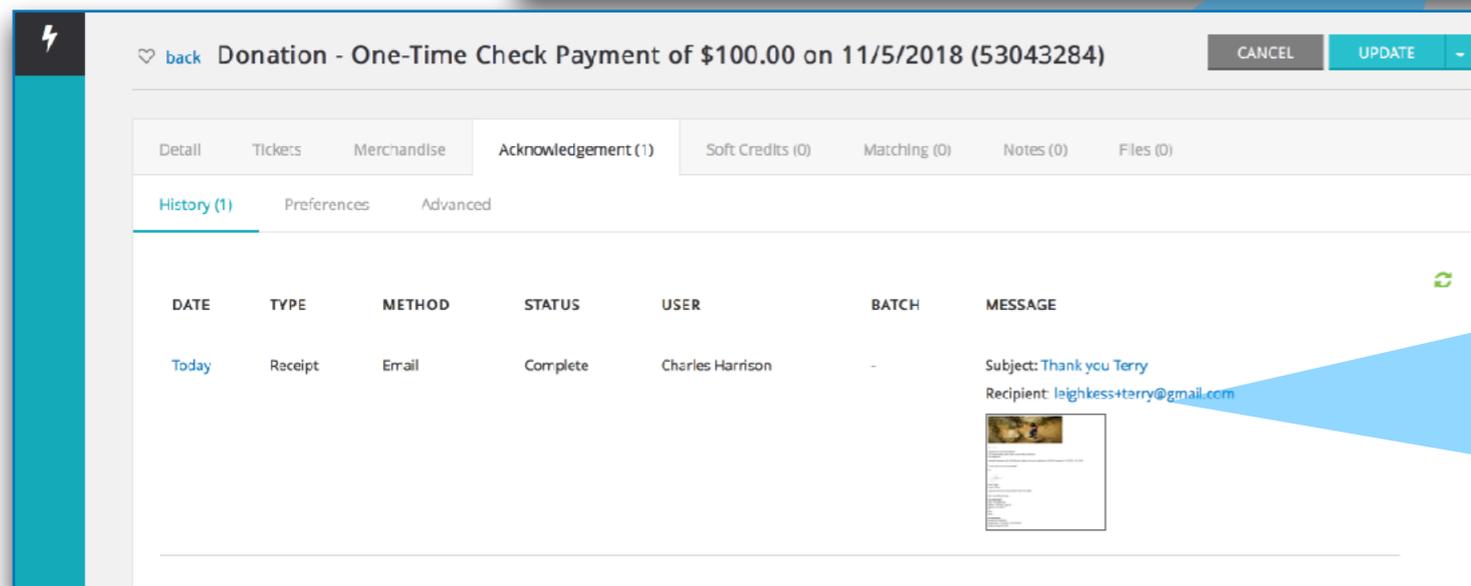
# View what was sent in the Receipt Log

After Acknowledgements have been sent, a log of the email or letter that was sent appears on the record, so you know exactly what was sent to the person and when! If a Tribute donation with a Tributee acknowledgment is sent, that will appear on the record as well.



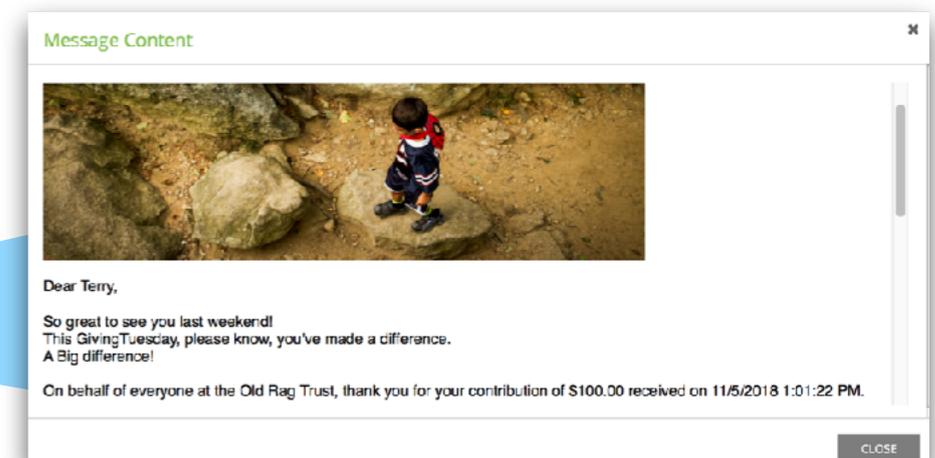
The screenshot shows the 'Transactions' page with filters for 'Acknowledged' and 'Don't Acknowledge'. A search for 'bathrobe' is active. The table below shows a payment record for Terry Bathrobe.

ID	CONTACT	TYPE	METHOD	AMOUNT	STATUS	LINKED	ATTRIBUTION	DATE	ACTIONS
53043284	Terry Bathrobe 123 Plush Carpet St Frederick, MD 10023 United States	One Time	Check Check #: 435234664 Batch: 75602	\$100.00	Confirmed Receipts: 1	False	Form: Default Batch Template Category: Donation	11/5/2018	...



The screenshot shows the 'Donation - One-Time Check Payment of \$100.00 on 11/5/2018 (53043284)' page. The 'Acknowledgement (1)' tab is selected, showing a log of the email sent.

DATE	TYPE	METHOD	STATUS	USER	BATCH	MESSAGE
Today	Receipt	Email	Complete	Charles Harrison	-	Subject: Thank you Terry Recipient: laighkess+terry@gmail.com



The screenshot shows the 'Message Content' window with the following text:

Dear Terry,

So great to see you last weekend!  
This GivingTuesday, please know, you've made a difference.  
A Big difference!

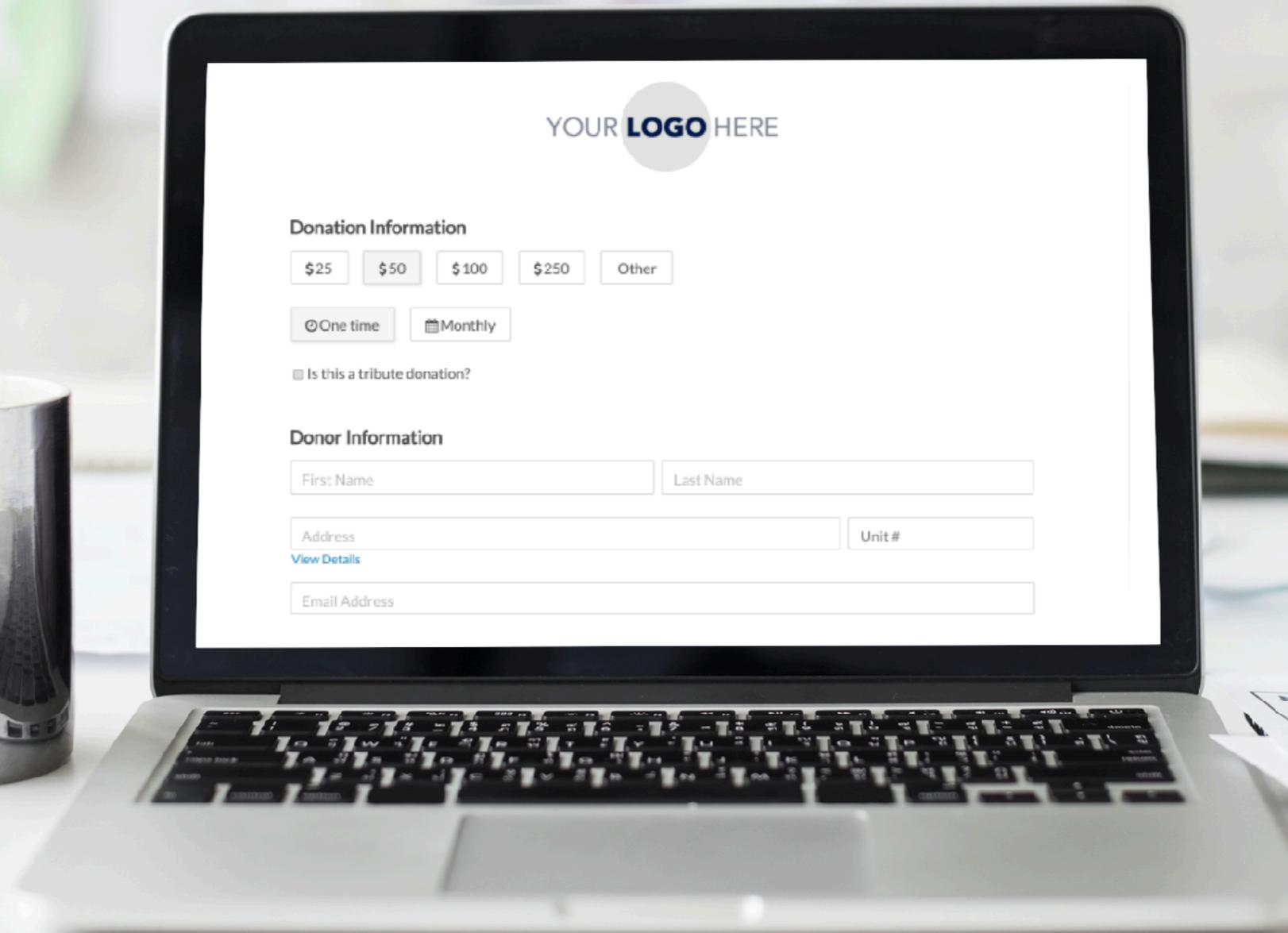
On behalf of everyone at the Old Rag Trust, thank you for your contribution of \$100.00 received on 11/5/2018 1:01:22 PM.

Don't forget to check out...

# Create Forms

A CharityEngine Training Document

[Click Here to Go To Create Forms](#)



The image shows a laptop on a desk with a silver mug, a green box, and some papers. The laptop screen displays a donation form interface. At the top of the form is a placeholder for a logo: "YOUR LOGO HERE". Below this is the "Donation Information" section, which includes radio buttons for "\$25", "\$50", "\$100", "\$250", and "Other". There are also radio buttons for "One time" and "Monthly". A checkbox labeled "Is this a tribute donation?" is present. The "Donor Information" section includes input fields for "First Name", "Last Name", "Address", "Unit #", and "Email Address". A "View Details" link is located below the "Address" field.

YOUR LOGO HERE

**Donation Information**

\$25  \$50  \$100  \$250  Other

One time  Monthly

Is this a tribute donation?

**Donor Information**

First Name  Last Name

Address  Unit #

[View Details](#)

Email Address