



# \$250 Acknowledgement Letter



## First time setup – creating the letter

- Click **Advanced Navigation** > **Communication** > **Diocese Template Letters**
- Double click the **\$250 Acknowledgement** letter.
- Click the **Copy** button and then the **Edit** button.
- Select your parish from the **Congregation** drop down list.
- Add your parish name to the **Letter Title** field.
- Click **Save** and click **Close** on the warning pop up.

## To print letters

- Clear any saved selections found here: Click **Home** > **My Selections** >
- Click **Contributions** and choose **Donations**.
- Change the view to **250 acknowledgment**
- Select one or more people to receive an acknowledgement.
- Click **Reports** and choose **Selected Contact Letter – Erie**.
- Choose YOUR **\$250 acknowledgement** letter from the Letter drop down.
- Fill the rest of the report screen according to your needs and click **View Report**

- Click the **Export drop down** (Diskette) button and choose **PDF** to print

## Marking records indicating a receipt has been sent.

- With the donations still check marked, click the **Actions** button and choose **Assign**.
- Check the box for **Received** and put the dot next to **Yes**.
- Scroll up/down to make sure no other box is checked and click **Assign** then **OK**.
- Click **All records** in the lower right corner and choose **Current/Unsaved Selections**.
- Click the **X** in the circle to clear all of the check marks.

## To send emails to individuals who have not opted out of bulk email

- Follow steps 1 & 2 above.
- Enter **Not Null** in the **Email** search box
- Select one or more people to receive an acknowledgement.
- Click Insert in the lower left corner then choose **Template** > **Donation Page templates** > **\$250 Acknowledgement**
- Click the **Send** button.
- Follow steps A-E above.