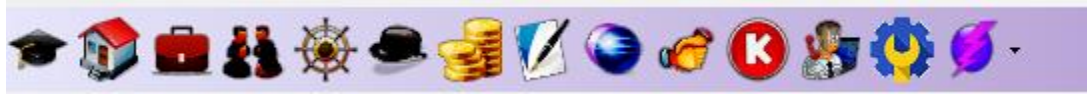




New Features Spring 2024



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Using the Acquisition Number Field

New notes have been created for the Acquisition Number field. The field is useful for recognizing how donations arrive at a charity. It provides the charity with an opportunity to say Thank You for the efforts of those who support it.

Donate Now

Donate Now has been updated to handle ticket sales so that Ticket Numbers are imported. We have found that multiple ticket purchases for events including additional information added to the notes area created an issue. We have now separated the notes from Ticket Numbers and these numbers are imported to the donor's Ticket Numbers field on a Receipt Record.

The Ticket Number Report under Receipting Reports no longer uses the word Lottery as these tickets may be from several sources.

These ticket numbers were imported from Donate Now.

The Ticket Confirmation Report found under Donor Receipting Reports provides a listing of all ticket purchased by donor.

Donate Now Ticket PDF

Donate Now has been updated to include a PDF printout of all tickets purchased.

Year End for PDF and eReceipts

We found an issue that has now been fixed such that yearly PDF and eReceipts can be run simultaneously.

PDF Receipts for Charitable and Non-Charitable Receipts

The format for these receipts have been modified so that when folded just beneath the line under the Authorized Signature is found will now fit into a Size 10 Window envelope.



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This should simplify mailings as labels are no longer required. A preprinted return address on window envelopes would be beneficial.

Q-Xpress Charitable No Receipt Required

This selection is used for CRA reporting. It can provide a list of all other charities where a donation was given but no receipt was required.

With the new receipt option for Charitable with a Non-Charitable Receipt, the selection below reports these situations.

Q-Xpress Selection (Receiving Amount, Payment Method, Date)

Current Record Count: 2 My Records Create

Delete existing records from file Enable Suppress mail option Enable Mailing Labels Count

Batch Number From: 0 To: 0

Campaign Type Campaign Code

AN - Annual Major Gifts AUC - Auction Items

BQ - Bequest CRP - Corporate Membership

BR - Branch Donations D01 - Quarter 1

CM - Conference D02 - Quarter 2

CS - Christmas Family Spons D03 - Quarter 3

DM - Direct Mail D04 - Quarter 4

Campaign Year From: To:

By Year Date From: Jan 01, 2024 To: Mar 27, 2024

Amount From: 0.00 To: 0.00

Acquisition Number: To:

Fundraising Number:

Payment Method

Amex

Bank Draft

Branch/Donation

Canada Helps

No Receipt Required

Include Dollar Amounts

Only Yearly Receipts

Only Voided Receipt

Mailing List:

Receipt Type: Charitable

Donor Type: Both Private and Corp

Create

Where a charity provides receipts for donations which exceed a specific amount, these records may also be selected but can be removed from the selection with a dollar range.

Type	Fundraising	Go To	Go To	Charitable	Receipt Type	Campaign	Sort Field	Amount
C	C003485			<input checked="" type="checkbox"/>	Non Charitable	2023GRDON	Campaign for Kids Foundation	5,000.00
C	C007050			<input checked="" type="checkbox"/>	Non Charitable	2023GRDON	Amphibian Foundation	1,000.00

Note the above all all Charitable donations with a Receipt Type of Non Charitable.