



New Features Spring 2025

1. Non-Charitable Receipts with GST

Campaign Maintenance

Campaign Year: 2025 Campaign Type: MB Campaign Code: IND

Description: 2025 Memberships Individual

Start Date: Jan 01, 2025 End Date: Dec 31, 2025

Mailed Appeals: 0 Mailed Reminders: 0

Breakout Code: MbrIndivid - Memberships Individual

Receipt Required: Yes (Based on Lowest Dollar Value Rec)

Letter: Membership

Goal Value: \$0.00

Membership

Renewal Date: Dec 31, 2025

Print on Receipt: Gift in Kind Thank You's

Charitable: Yearly Receipting: On-going: Ticket Number Unique:

Donation Category: Ticket Sale/ Registration Donations Sponsorship Merchandise Volunteers Hours Only

Registration/Ticket Cost: \$5.00

Received Value: \$100.00

- Features to Note:
- Breakout Code is entered.
- Receipt Required is Yes.
- Charitable is No.
- Letter is Membership.
- Print on Receipt is Thank You (found under Campaign Profile).
- Donation Category is Merchandise.
- Membership Renewal is defined.

Important Note:

We used the Ticket value to identify the Fixed Amount in the Received Value field and the GST in the Registration/Ticket Cost Field.

Once these values were added we changed the Donation Category to Merchandise. This ensures the Receipt Amount is allocated to the donor's merchandise in their Donor Profile when U2M is run.

Receipting Maintenance

Fundraising Number: P000013 Donor: Peter Anderson

Batch Number: 20250316001

Receipt Date: Mar 16, 2025 Date Received: Mar 16, 2025

Campaign: 2025MBIND 2025 Memberships Individual

Payment Method: Cheque Chq/Conf number: [blank]

Donation Type: Charitable

Receipt Required: Yes (Based on Lowest Dollar Value Receipt) Receipt Number: 0

Acquisition Number: [blank]

Amount: \$100.00 Breakout >

Breakout	Amount
MbrIndivid -	\$100.00

Registration Amount: \$5.00

Ticket Number: 0

Mailing List: [blank]

Pledge ID - Detail ID: [blank]

Letter: Membership Renewal Date: Dec 31, 2025 Adults: 1 Children: 0

T-Ref: [blank]

Receipt Notes: [blank]

Printed: Void: Yearly Receipting: eReceipt: PDF Receipt: Anonymous: Updated To Master:

- Peter Anderson gets eReceipts.
- PDF receipts are printed.
- We had to modify the eReceipt checkbox but checking PDF Receipt.
- Note** the Amount and the Registration Amount.



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We processed the PDF Receipt and Printed it.

		OFFICIAL TAX RECEIPT	RECEIPT	N21
<p>ABC Foundation 201 10435 178 Street NW Edmonton AB T5S 1R5 Phone (780) 489-9911 Fax (780) 487-3401 E-mail: info@abcfoundation.org Web: www.abcfoundation.org</p>				
		Date	Mar 16, 2025	
		P000013	N21	
The Sum of One Hundred Five		Dollars	00/100 \$	105.00
Received From				
Mr Peter Anderson 4103 134 Avenue NW Edmonton AB T5A 2T2				
		Authorized Signature		
			Executive Director	

Guess What! There was **no Thank You message** and do you know why?

I placed the original message on the <=\$100.00 but the amount exceeded \$100.00.

LOL one on me! So I fixed it. Be sure you are careful and remember the GST amount is added to the overall value.

2. **DIY Fixes notes** have been added to your Tutorial Section

Just search on DIY Fixes



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3. **Client Request**

Tanya asked if we could make the Lookup Tables sortable. So we did. Thanks Tanya
By Clicking on the column title the listing will sort alphabetically A-Z. Click a second time and the table will sort Z-A.

4. **Error Fix:** We have modified the problem when printing receipts. In some instances, a letter appears in front of the Receipt Number which makes is incorrect. This affects eReceipt printing.

5. **Q-Xpress Pledge Identification:** When pulling a Q-Xpress listing by Receipting Amount Payment Method Date with Include Dollar Amounts checked we have added the Pledge ID and Pledge Detail ID information to the Q-Xpress View.

Please be sure to keep current by check all previous updates.

The Batsch Group Team