

# Generating receipts in infoodle

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The process of generating receipts in infoodle is streamlined to ensure they are quick and easy to do. Here are some easy to follow steps and hints to make it easy.

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## Year end

infoodle does not have a year end process in the same way that an accounting system does. It does have a setting in the **Administration / System / Finance** area to set when your financial year starts, but this is purely so that you can filter transactions on various screens and it performs no accounting function.

However, many organisations produce their receipts (contribution summaries) at the end of their year. This page gives you some tips on things to review prior to issuing those receipts:

### **1. Has everything been setup for receipting?**

Before generating receipts make sure that you have read through the **Checks prior to receipting** information below.

### **2. Check your numbers match your accounting system.**

Do this by running one or all of the Finance reports as described in the infoodle Help system.

### **3. Check the right people have the right amounts**

You can run a People Finance report to view a list of people and the amounts they have given during the year.

### **4. Giving numbers**

If you wish to combine finances from people in the same household, you need to ensure they share giving numbers. These can be included on the report generated in point 2 above by including the **Giving number** option. Check the current giving numbers and use that screen to add/update giving numbers.

### **5. Printed receipt**

Check to ensure you have a receipt template setup that looks how you want it. If you are going to email them, ensure that it has all the info you need such as charity number, name of organisation etc.

### **6. Email receipt**

If you wish to email some or all of the receipts:

a) Check that you have an email template as well as a receipt template. This will be the email that is sent out and gives the unique link for the user to click and download their receipt. The email template must have the personalisation {receipt link} in it somewhere!

b) Check you have the correct email address for each individual.

### **7. Check the receipts are issued to the individual or house hold.**

Click **Finance** and then **Receipts**. Listed will be all the receipts you are due to issue. Ensure that the **Receipt to** column shows the names you expect. If some are blank, it is likely that you have set the transactions to be issued to the household but don't have a household name. Either add a household or organisation name, or click **Details** and change the **Receipt to** to **Individual**.

## Checks prior to receipting

Before getting started make sure that you have setup the following first:

A. **Finance settings** - click on **Administration** then **System** then **Finance** to set these up:

1. **Tax year starting month** - this is the first month of the year that your tax year starts where April is the common month used.
2. **Details of the organisation issuing the tax receipt** -your organisation details.
3. **Charity number** - If you wish to have your charity number included in the receipt, then you can add the number in the Finance settings and add the {charity number} personalisation in the correct place in the receipt template if you wish.

B. **Receipt template(s)** - In order to print a receipt you need to create a receipt template first. This tells infoodle where to place the text, images and receipt information on a PDF page.

C. **Transactions entered under Batch Transactions** - These transactions need to be marked as not printed in order to appear on this screen. They are marked as printed once the receipt is generated and you click mark as printed.

D. Prior to generating receipts - please ensure your receipt names and totals match (see below for more information).

### Check the totals

It is vital that the numbers within infoodle match with your accounting activity. In general you would expect there to be one or more donation lines in your accounts, and this should match up with the totals you are about to receipt. If it doesn't match, there needs to be a good and documented reason why!

For each batch you process in infoodle, we encourage you to print off a full batch report once you are sure the numbers are correct. This enables you to pick up any errors straight away.

To do a quick check on the totals:

1. Click **Finance** on the Navigation Menu.

2. Click **Receipts**.

## Generate Receipts ?

Filter the list of transactions using the following options

Show each transaction

When to issue receipt: Combined  One-off

Tax deductible: Non deductible  Deductible

Year starting: Apr 2017 Up to the end of: Mar

Transaction types: All

Batch name:

Sort order: First and last name Ascending

Items per page: 50

**SHOW**

3. Ensure that you have the right year selected in the filter, and click **SHOW**.
4. Scroll to the bottom of the page. The total shown there may often be sufficient. **NOTE:** if there are a large number of transactions that span across more than one page then the total at the bottom of the page will be the total for that page. To see the final total for all pages, go to the last page.

Template Create/Edit	Print Select all	Email Select all	Pre- edit	Receipt to	Total amount	Type
all fields for automated testing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	T 1234	\$10.00 <a href="#">Details</a> <a href="#">Preview</a>	One off
all fields for automated testing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	E 31	\$100.00 <a href="#">Details</a> <a href="#">Preview</a>	One off
all fields for automated testing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mr A AAA	\$1.00 <a href="#">Details</a> <a href="#">Preview</a>	One off
all fields for automated testing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C Agency	\$100.00 <a href="#">Details</a> <a href="#">Preview</a>	One off
all fields for automated testing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	D ARMSTRONG	\$10.00 <a href="#">Details</a> <a href="#">Preview</a>	One off
all fields for automated testing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mrs D Armstrong	\$10,000.00 <a href="#">Details</a> <a href="#">Preview</a>	One off
all fields for automated testing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mr J & Mrs J Bloggs	\$51.00 <a href="#">Details</a> <a href="#">Preview</a>	One off
all fields for automated testing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	M Dale	\$100.00 <a href="#">Details</a> <a href="#">Preview</a>	One off
all fields for automated testing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mr F Fiddel	\$100.00 <a href="#">Details</a> <a href="#">Preview</a>	One off
all fields for automated testing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mr H Houdini	\$10.00 <a href="#">Details</a> <a href="#">Preview</a>	One off
general tax receipt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	F Hughes	\$400.00 <a href="#">Details</a> <a href="#">Preview</a>	One off
all fields for automated testing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mr F Jones	\$80.00 <a href="#">Details</a> <a href="#">Preview</a>	One off
all fields for automated testing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Miss E Phillips	\$100.00 <a href="#">Details</a> <a href="#">Preview</a>	One off
<b>Total</b>					<b>\$11,062.00</b>	

5. If you need more detail then you may need to go to the Reports menu and run a People Finance Report (see infoodle help for more information).

## When to receipt?

There are a variety of ways that different organisations generate their receipts:

### One receipt run after year end

For organisations such as churches, they will often collate their transactions throughout the year, and then once the year end is completed, they issue a tax receipt which is a total of the activity for a person during the just completed year.

### On donation receipting

For organisations that receive occasional donations which may only be once or twice a year from individuals and they wish to be responsive to them, they may wish to issue a receipt at the same time they received the donation.

### Periodic receipting

For some organisations it may be convenient for them to process their receipt run once a month, quarter etc.

### Mixture of the above

Depending on the type of organisation and donations received there may well be a combination of the above receipting processes happening throughout the year.

## Whose name will it generate the receipts under?

By viewing the list on the Receipts screen (as in the screenshot above), you can see the names that infoodle will use to generate a receipt in the Receipt to column. These names are available using the {receipt to name} personalisation field. This also is used as part of the {receipt} personalisation which generates all the key information required in receipts.

If the names are incorrect, then you need to review the following options and adjust the relevant data so you see the receipt names as required.

Single person's name	e.g. Mr J Smith	Used for individual donations.  The transaction needs to be set to 'receipt to individual'.  They need their own giving number or no giving number. If this individual is splitting their giving equally with other people and need their receipt issued separately, then ensure they share the same giving number with the others, but the giving number is set
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to 'split' rather than 'combine' in the giving number screen.

Couples name	e.g. Mr J & A Smith	Used for a couples donations who are combining their giving.  The transaction needs to be 'receipt to individual'.  The couple either needs a single person record for them both, or they have two person records and are allocated the same giving number. In order to combine the couple, for receipting purposes, the <b>Marital Status</b> field needs to be set to the same value in each of their personal records e.g. both set to Married or De facto.
Household name (or organisation name)	e.g. The Print House Ltd	Used when an organisation donates rather than the individual's in that organisation.  The transactions need to be 'receipt to household' or 'receipt to organisation'.  The household name needs to be set in their address area of their person record.
Alternative household name (or organisation name)	e.g. The Print House Children's Trust	Used when an organisation donates, and the household name is used as part of the normal infoodle operations e.g. letters, emails and reports. The transactions need to be 'receipt to household' or 'receipt to organisation'.  The Receipt to Alias needs to be set for their household information.

Now you are ready to start generating receipts!

# Receipt templates

## Adding a receipt template

When generating your receipts, you will need to tell infoodle what text and data to include on the receipt. This process is done by setting up a receipt template and then directing infoodle to use that template.

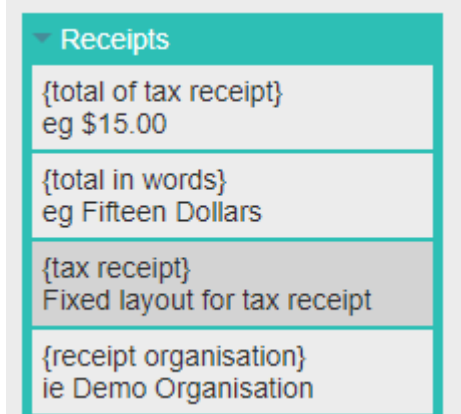
Here's how to add a receipt template:

1. Click **Finance** on the Navigation Menu.
2. Click **Receipts**. (You will need permission in your role to access this).
3. Click **MAINTAIN RECEIPT TEMPLATES**.
4. Click **NEW** to create a new template.
5. When creating the template you will see on the right hand side a number of personalisations available, in addition there is a link for 'receipts'. Click this to show a further list of personalisations that you can use in your receipts. If you wish to use the receipt block personalisations that infoodle has pre-prepared which includes the receipting organisation, receipt number, amounts, transactions and the receiver of the receipt - then you need to ensure that the Finance settings are correctly established. This is done by clicking **Administrations | System | Finance**. This screen allows you to enter, amongst others things, the charitable number and organisation details.
6. Type the content of the receipt i.e. if you want to say thank you or anything else, and then include the relevant receipting information. You will need to ensure the letter contains personalisations so that infoodle knows where to put items such as the amounts and who the receipt is for, etc.
7. To add personalisation fields (mail merge) simply click in the position in the body of the content where you want the personalisation to appear and then click on the personalisation

field on the right.



8. To select the receipt personalisation fields click on **Receipts** to drop down a list of options.



9. Using the personalisations on the right you can ensure that a letter is generated with the person or organisations name, who the receipt is for ('receipt to' fields), etc.
10. There are a number of 'receipt from' fields. These refer to you and the data is pulled from the system settings added by your administrator in the system screen (as mentioned in point 5 above).
11. Images can be loaded into the template using the image icon in the list of icons. They will make the generated files quite large and can slow the process down, so be aware of that.
12. Once you have finished creating your template click **GENERATE TEST** and then **Show generated document** to preview your changes.
13. Enter a **Template name**, check the **System template** box (if you wish others in your organisation to use these receipt templates and click **SAVE**



14. Here is an example of a receipt template:

```
{date}

Dear {receipt to name},

Thank you for your kind donation this year of {total of tax receipt}.

{tax receipt}
```

Path: p

Template name:    System template

Note: The process of converting these content pages to a receipt template is complex and there are some limitations to be aware of:

1. If you wish to use a table to layout the content more easily, please ensure that all cells only have 1 line in each row. If you have one cell with 3 lines and a cell next to it with 1 it can cause issues.
2. Another limitation is that the range of fonts available is fairly limited but you can select the ones from the list, and change the font sizes.

## Searching for a receipt template

1. Click **Finance** on the Navigation Menu.
2. Click **Receipts**. (You will need permission in your role to access this).
3. Click **MAINTAIN RECEIPT TEMPLATES**.

### Generate Receipts

Filter the list of transactions using the following options

Show each transaction	<input checked="" type="checkbox"/>	Year starting	Apr	2017	Up to the end of	Dec
When to issue receipt	Combined <input checked="" type="checkbox"/>	Transaction types	All			
	One-off <input checked="" type="checkbox"/>	Batch name	<input type="text"/>			
Tax rebatable	Non rebatable <input checked="" type="checkbox"/>	Filter by group	<input type="text"/>			
	Rebatable <input checked="" type="checkbox"/>	Sort order	When to receipt	Ascending		
		Items per page	50			
			<input type="button" value="SHOW"/>			

Bulk change which templates are used

4. Select the Receipt template from the **Template** dropdown list.

## Editing a receipt template

Editing a receipt template is simple. Here's how:

1. Search for the receipt template you wish to edit.
2. Make the relevant changes.
3. Click **GENERATE TEST** and then **Show generated document** to preview your changes.
4. If you are happy with the changes click **SAVE**.

## Deleting a receipt template

Deleting a receipt template is simple. Here's how:

1. Search for the receipt template that you wish to delete.
2. Select the template that you wish to delete from the Template dropdown list.
3. Alongside the template dropdown list click **Delete**.
4. If you are sure, click **OK**.

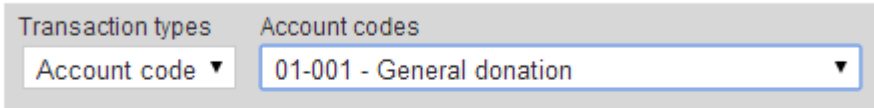
**Note:** Remember that deleting a common shared system template will delete it not only for you but all users.

## What needs receipting?

This page enables you to filter the transactions that are waiting to be receipted.

Here's how to filter the transactions:

1. Click **Finance** on the Navigation menu (You will need permission in your role to access this).
2. Click **Receipts**.
3. On the **Generate Receipts** screen filter the list of transactions by selecting the relevant options.

Show each transaction	You can either choose to see a total for the person (or receipt), which is the summary view, or you can see the detail which will list each affected transaction.
When to issue receipt	This gives you the option whether you want to list the transactions set as <b>Combined</b> (receipted at year end) or <b>Once-off</b> (ad-hoc, as necessary) or both types.
Tax rebatable	By default you are shown all transactions regardless of their tax rebate status. You can select to just show those that are available for rebate, or those that have no tax rebates. It will depend on how you wish your receipts to appear.
Year Starting	This uses the month as configured in your Administration / System screen, and displays the current (financially) active year. This will list all the transactions in that year.
Transaction types	The will list all the types you have available e.g. Account code, Membership, Stock. Once you have chosen one of these, you will be presented with the list of choices of that option to the right.  E.g. 
Batch name	To filter by batch, enter the batch name in full that you wish to filter on.
Filter by group	Select a group that you wish to filter by.
Sort order	Select a preferred sort order.
Items per page	Select the number of transactions you wish to view on a page.

4. Click **SHOW** to reveal the list of matching transactions below.
5. Now you are ready to generate or print receipts.

## Printing receipts

Before generating receipts make sure that you have read through the [Checks prior to receipting](#) information section.

The Generate Receipts screen allows you to generate tax receipts for the transactions you have entered in the batch transaction area.

### Adding a one off receipt

In the Generate Receipts screen filter infoodle gives you the option of listing transactions by their **When to issue receipt** criteria. Either you can issue a combined receipt for a period e.g year end or you can produce a one off receipt. This **When to receipt** criteria is set when you add a transaction.

A one off receipt is a receipt that is created ad hoc or as necessary as you go. It can be for one transaction or a collection of transactions receipted in one receipt which can either list each individual transaction or give a summary of transactions for that time period.

### Combining receipts

In the **Generate Receipts** screen filter infoodle gives you the option of listing transactions by their **When to issue receipt** criteria. Either you can issue a combined receipt for a period e.g year end or you can produce a once off receipt. This **When to receipt** criteria is set when you add a transaction.

A combined receipt is a combination of transactions, for a time period, receipted in one receipt which can either list each individual transaction or give a summary of transactions for that time period.

## Issuing joint receipts

infoodle stores individual's details and when you enter transactions you assign them to an individual. You can then choose to generate a receipt either to the individual or in the household (or organisations) name. This is all fine until there are multiple people in the household and they wish the receipt to be generated in both their names. infoodle has the function of using giving numbers as a way to combine (or split) receipts between different people.

Here's how to issue joint receipts:

1. Combine the individuals within a household by their giving number. For more information on this search for 'Combining giving numbers' in the infoodle Help System.
2. Search for the transaction to receipt and generate a receipt.

Go to the '[whose name will it generate receipts under](#)' section for more information.

If you have already issued the receipt incorrectly under one individual's name then you will need to delete the current incorrect receipt and re-receipt after editing the transaction.

## Generating or printing receipts

1. Filter the list of transactions to find the transaction(s) that you wish to receipt.
2. Listed will be all the transactions waiting to be receipted. Ensure that the **Receipt to** column shows the names you expect. If some are blank, it is likely that you have set the transactions to be issued to the household but don't have a household name. Either add a household or organisation name, or click **Details** and change the **Receipt to** to **Individual**.
3. Once you have identified the transactions you wish to generate receipts for, tick them (either one at a time, or click the **Select all** tick box).
4. Select the tax receipt template for each transaction. If there are none then you need to create a template. Otherwise you can choose them individually, or at the top of the list, choose the template name you want and click **Bulk change which templates are used** to change them all.
5. Select whether you wish to **Print** or **Email** the receipt.

6. Notice in the screenshot below that the 1st row has the email address for Mr B Wakefield listed together with a tick to enable you to select this row for receipting. The 2nd row has no email address and therefore no tick box under Email.

Template Create/Edit	Print Select all	Email Select all	Pre-edit Select Max.	Receipt to	Total amount			Type
demo tax receipt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mr B Wakefield myemail@satechs.com	\$20.00	<a href="#">Details</a>	<a href="#">Preview</a>	One off
Default tax receipt ▼	<input type="checkbox"/>		<input type="checkbox"/>	Mr M de Vetter	\$58.00	<a href="#">Details</a>	<a href="#">Preview</a>	One off

7. If you wish to edit the receipt before it is generated then click the pre-edit link. This will present the generated receipts in a window for you to be able to edit or personalise each individual receipt before sending them out (there is a limit of 20 transactions at a time for this feature). You can choose to generate printed and emailed receipts in the same 'generate' but not for the same receipt ie you can print 1 receipt for one person and email another receipt for another individual. You can choose to pre-edit a line also but only pre-edit. This means you can either pre-edit, or generate the output. i.e. as soon as you choose one line to pre-edit, you need to pre-edit them all, or come back on the second screen to choose to not pre-edit. You can now choose up to 20 items to pre-edit. A new **Select Max** link at the top of the list of checkboxes will select the maximum.
8. Choose what is to be listed on the receipt. If you have chosen **Show each transaction** (which shows the summary) in the filter above, then you are able to choose whether to **Just show a summary total of transactions** or whether to **List each transaction**, their dates and amounts. If you have chosen **Rebatable** and **Non rebatable** in the **Tax rebatable** filter option, then you are asked which types you wish to actually list in the receipt. Neither of these options affects the fact that the transactions are marked as being receipted and which receipt number they are given, but it will affect the content added to the receipt.

# Generate receipts

Choose the way you want each receipt to be generated

What level of detail do you want to show		Which type of transactions to list	
List each transaction	<input checked="" type="radio"/>	Tax rebatable	<input checked="" type="checkbox"/>
Just show a summary total of transactions	<input type="radio"/>	Non rebatable	<input checked="" type="checkbox"/>

<b>Generate</b>	0 receipts	
<b>Pre-edit</b>	0 receipts	
<b>Email</b>	0 receipts	Select the template for the email

▼

**GENERATE**

9. Select the email template for the email from the dropdown (if you are emailing a receipt).
10. Click **Generate** and infoodle will then take you to the pre-edit screen, one for each receipt you have chosen to pre-edit. Review and edit each one as you need to.
11. You can choose to auto refresh the preview or request it by clicking the button (this setting is remembered for you for next time but can be changed by unticking the **Auto preview** box). If there are any issues then you can go back to a previous step and regenerate the receipts. You can keep repeating this as often as necessary. Note that the receipts you choose not to finalise will still have a unique number allocated but they will be marked in the database as void automatically and therefore you may end up with gaps in your receipt numbers.
12. Once you have completed editing the pre-edit receipt then click **Save** and click **MARK THESE TRANSACTIONS AS PRINTED**.
13. It is this action of generating which sets the receipt number against the transaction. Once generated and **marked as printed**, the receipt number is tied to that transaction regardless of how often it is printed. You can however regenerate receipts as often as required but it is only until you click mark as printed on the popup that the receipt is locked.
14. Infoodle will create the receipts and store them and mark them as printed, then email the recipient to the email address shown. Once completed infoodle will remove the selected item(s) from the list on the screen.

## Searching for a receipt

To search for an existing printed receipt (a transaction that has already been receipted and marked as printed):

1. Click **Finance** on the Navigation menu (You will need permission in your role to access this).
2. Click **Printed Receipts**.
3. On the **Printed Receipts** screen filter the list of transactions by selecting the relevant options.

### Printed Receipts

Filter the list of transactions using the following options

Year starting	Apr	2017 ▼	Up to the end of	Mar ▼	<b>Other functions</b>
Receipt					Bulk download
Filter by group					
Sort order		First and last name ▼		Ascending ▼	
Items per page		50 ▼			
<b>SHOW</b>					

Year Starting	This uses the month as configured in your Administration / System screen, and displays the current (financially) active year. This will list all the transactions in that year.
Receipt	Enter a receipt number here if you know the number.
Filter by group	Select a group that you wish to filter by.
Sort order	Select a preferred sort order.
Items per page	Select the number of transactions you wish to view on a page.

4. Click **SHOW** to reveal the list of matching printed receipts.



## Editing a receipt

This page shows you how to edit a receipt.

There are times when you need to edit a receipt for a number of reasons:

- Send a receipt by email which has already been printed - see below for more information.
- Resend a receipt to a different email address - see below for more information.
- A mistake has been made on the receipt e.g. it was receipted to the wrong person or the wrong account code was allocated, etc. Go to the section that explains how to delete a receipt for more information.

### **Sending an already printed receipt to the same or different email address**

Sometimes people will have trouble receiving your email and so you need to re-send it.

Receipt #	Receipt to	Total amount	Type	Action	Date		
730	H Test test@com	\$10.00	<a href="#">Details</a> <a href="#">Download</a>	Combined	Emailed	13 Nov 2017	<a href="#">Delete</a>

1. Search for the printed receipt.
2. Click the **Details** link beside the receipt you wish to send.

3. Click **View email**

Receipt details

Issue receipt to H Test

Individual Hospice Test

Household

Receipt alias

Email address test@com

Alternate Email

Date	Description	Amount	Tax rebatable	Receipt to
12 Oct 2017	Donation to building 2014	\$10.00	No	Individual
<b>Total</b>		<b>\$10.00</b>		

**User link to this receipt**  
[https://demo.infoodle.com/user\\_receipts?pS1wC9A/6YqyRtMtTju57EZg0+1YEUfV3J9Id622AYU=](https://demo.infoodle.com/user_receipts?pS1wC9A/6YqyRtMtTju57EZg0+1YEUfV3J9Id622AYU=)

**Email activity**

Emailed	13 Nov 2017 10:26am	test@com	<a href="#" style="color: #00a68a;">View email</a>
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4. Check the email address or enter a new one and click **Send**.

**Email**

Dear Hospice

Here is your receipt - click below to see it.

[https://demo.infoodle.com/user\\_receipts?pS1wC9A/6YqvRtMtTju57EZg0+1YEUFV3J9ld622AYU=](https://demo.infoodle.com/user_receipts?pS1wC9A/6YqvRtMtTju57EZg0+1YEUFV3J9ld622AYU=)

Donation to building 2014  
12 Oct 2017

thanks..

Richard.  
Mr Admin User

PO Box 123 | High Street | New Zealand

NOTICE OF CONFIDENTIAL INFORMATION. The information contained in this e-mail message is CONFIDENTIAL and is intended only for the individual or entity named above. If you are not the intended recipient, you are notified that any use, review, dissemination, distribution or copying of this document is strictly prohibited. If you have received this document in error, please immediately notify us by telephone (call our office) and delete this transmission. THANK YOU.

Resend this email to  **SEND**

5. You can track their activity by clicking **details** once again for the receipt you are watching.

Email activity			
Downloaded	20 Sep 2015 16:31		
Viewed	20 Sep 2015 16:29		
Viewed	20 Sep 2015 16:26		
Emailed	20 Sep 2015 16:23	bobbbb@whoknows.com	<a href="#">View email</a>

## Deleting a receipt

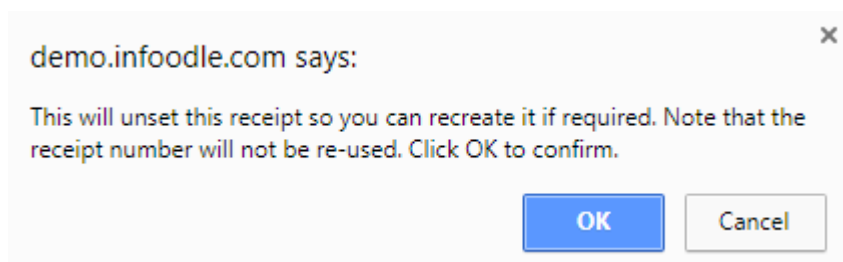
There are times when you realise that you have made a mistake on a printed receipt or incorrectly allocated a transaction to an incorrect account code, campaign, person, etc. or even if you have issued a receipt in one person's name but they wish to have the receipt in both husband and wife's name. In order to rectify this you will need to delete the current printed receipt then go back to the transaction to correct the mistake and then re-receipt the receipt. If you have emailed a correctly allocated receipt to the incorrect email address then you do not need to delete and re-receipt but simply go to the edit a printed receipt section.

Follow these steps to show you how correct a mistake on a receipt:

1. Search for the printed receipt.

Receipt #	Receipt to	Total amount		Type	Action	Date		
730	H Test test@com	\$10.00	<a href="#">Details</a>	<a href="#">Download</a>	Combined	Emailed	13 Nov 2017	<a href="#">Delete</a>

2. Click **Delete** alongside the receipt that you wish to delete.
3. Click **OK** after reading the warning to continue or click **Cancel**.



4. Now you will need to edit the transaction to correct any of the incorrect allocations.
5. Now you can generate a new receipt for the corrected transaction.

That is now done, receipt corrected.

**Note:** If the mistake that you made was to select to only receipt one individual and not e.g. husband and wife then you will need to edit the transaction appropriately and make sure that the couple have been issued joint giving numbers in order to receipt them together.

## Emailing a receipt

infoodle enables you to email your receipts either in bulk or one at a time. For this to occur there needs to be 3 things setup prior to receipting.

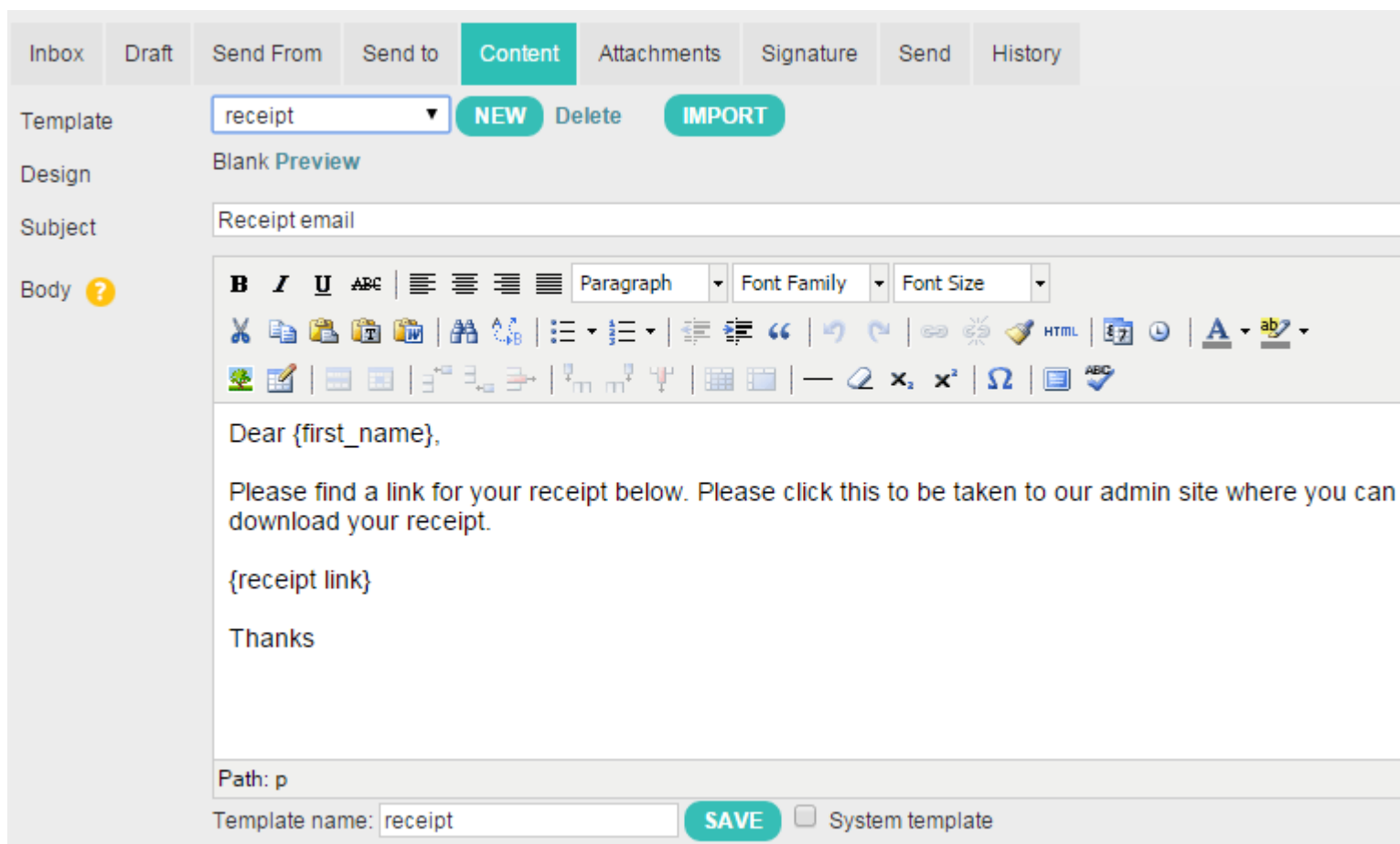
### 1. The person needs an active email address

On their profile page, ensure there is an email address that is ticked as active.

### 2. An email template for the email needs to be setup

The person will receive an email from you which describes the fact that they have received a receipt. Contained in the email is a link which when clicked brings them back to infoodle to see their receipt. From there they can print or download it. Therefore you need to create a suitable receipt which includes the personalisation option **{receipt link}**. infoodle will replace this with the actual link.

Example is shown here:



The screenshot shows the 'Content' tab of an email template editor. The interface includes a top navigation bar with tabs: 'Inbox', 'Draft', 'Send From', 'Send to', 'Content' (active), 'Attachments', 'Signature', 'Send', and 'History'. Below this, the 'Template' dropdown is set to 'receipt', with 'NEW', 'Delete', and 'IMPORT' buttons. The 'Design' section shows 'Blank Preview'. The 'Subject' field contains 'Receipt email'. The 'Body' field contains the following text: 'Dear {first\_name},', 'Please find a link for your receipt below. Please click this to be taken to our admin site where you can download your receipt.', '{receipt link}', and 'Thanks'. A rich text editor toolbar is visible above the body text. At the bottom, the 'Path' is 'p', the 'Template name' is 'receipt', and there is a 'SAVE' button and a 'System template' checkbox.

### 3. A receipt template for the receipt needs to be setup

As for any other receipting from infoodle you need to establish a receipt template.

Now you are ready to generate the receipt to email.

## What does the recipient see when receiving a receipt by email?

First they receive your email with the link. It will look something like this:

Dear Fred,  
Please find a link for your receipt below. Please click this to be taken to our admin site where you can download your receipt.  
[https://infoodle.com/user\\_receipts?DsqliYfzsQOVuMFRfqRDRRe2gscyQKxMvCjvXQxE7CP8=](https://infoodle.com/user_receipts?DsqliYfzsQOVuMFRfqRDRRe2gscyQKxMvCjvXQxE7CP8=)

When they click on the link they are taken to a page showing your receipt - something like this:

**Demo Charity** download print

15 September 2014

Fred Dagg  
16 Blue Street  
Matamata 2254

Dear Fred,

Thank you for your kind donation of \$600.00. This has gone towards the general upkeep of our building and towards the running costs of our organisation.

This letter provides you with the receipt you need for IRD purposes.

Kind regards,

Mr Test  
CEO.

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<b>Demo Organisation</b> 99 High Street Test Area Test Location	<b>OFFICIAL RECEIPT</b>	Receipt No. 10
	<b>Not Tax Rebatable</b>	
	6 Aug 2014	\$600.00
RECEIVED FROM Fred Dagg 16 Blue Street Matamata 2254 NZ	Total	\$600.00

