## crimson

The **Print Receipt** function allows you to produce a .PDF receipt of a contribution to provide to another person or to print.

## **Prepare the Fund Code Prior to Generating Receipts**

In order for the proper information to appear on the receipt, the organization name and address fields must be pre-populated in the **Fund Code's** profile. To do so:

- 1. Go to the Fundraising Dashboard.
- 2. Select Settings in the Navigation Bar.
- 3. Click the **Fund** tab. Note: You will need to do this only once for each fund code.
- 4. Open the Fund Code you would like to be able to print receipts for by clicking the 📩 button.
- 5. Enter the **Organization Name** and the **Organization Address**.
- 6. Click Save.

| ID                       | Cycle              | Organization Name  | Form 3                                    |
|--------------------------|--------------------|--|---|
| 20222                    | 2022               | Campaign 2022  | зр 🗸                                      |
| Fund Code                | Fund Type G        | Note/Comment   | Include in Report Include in Summany Calc |
| Description General 2022 | Cycle Start        | Organization Address<br>1593 Spring Hill Rd<br>Suite 400 | Debt Retirement Debt Retirement Start On  |
| Client Code              | CycleEnd 11/8/2022 | Vienna, VA   | <b>#</b>                                  |

## **Print a Contribution Receipt**

Take the following steps to print a single contribution receipt:

- 1. Use the **People Search** to find the donor record and open the donor's profile.
- 2. Click the **Giving History** panel and then click **All** under **Recent Gifts** to see a list of all gifts.

| All-Time Total<br>\$11,075<br>8 gifts   | Soft Credits<br>\$0<br>0 gifts | Pledges<br>\$0<br>YTD | Sifts<br>Consecutive<br>Gifts<br>Donor since<br>cycle 2022 | Recent Gifts         Statement         Add           MID 4580 • #1009 • 9/23/22 • \$100 • CH         G2022 • Event • 5KRUN • N/A         MID 4581 • #1235 • 9/1/22 • \$5,000 • CH         RV • Internet • JFCTEST • N/A |
|---|--------------------------------|-----------------------|--|---|
| \$6,075<br>Total Raised (YTD)   7 gifts | ~                              | Giving Overview       | ×.   | <ul> <li>MID 4578 • #abcd • 8/25/21 • \$25 • CH</li> <li>G2022 • Housefile • 0001 • N/A</li> </ul>  |

3. Find the contribution that you want to print a receipt for.

| Fund   | So    | urce    | ~       | Program |         | v Date  |           | •      |
|--|-------|---------|---------|---------|---------|---------|-----------|--------|
| <b>T</b> Hide Filters  |       |         |         |         |         |         |           |        |
|  | Tran# | Date    | Amount  | Fund    | Source  | Package | Program   | Tracka |
| X      X | 4580  | 9/23/22 | \$100   | G2022   | 5KRUN   | EVENT   | Event     |        |
| 🖊 🗙 🛓  | 4581  | 9/1/22  | \$5,000 | RV      | JFCTEST | WEB     | Internet  |        |
| A     A  | 4578  | 8/25/21 | \$25    | G2022   | 0001    | TESTPKG | Housefile |        |

- 4. Click to generate and download a .PDF of the transaction's receipt.
- 5. Open the downloaded file and print it or save it to send to someone via email.

Gift