making the most workshop

donor.com 2009 community conference

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AGENDA

1. Configuring dasco3 View Trends
2. Configuring the Communication Log
3. E-Receipting
4. What’s on your mind?

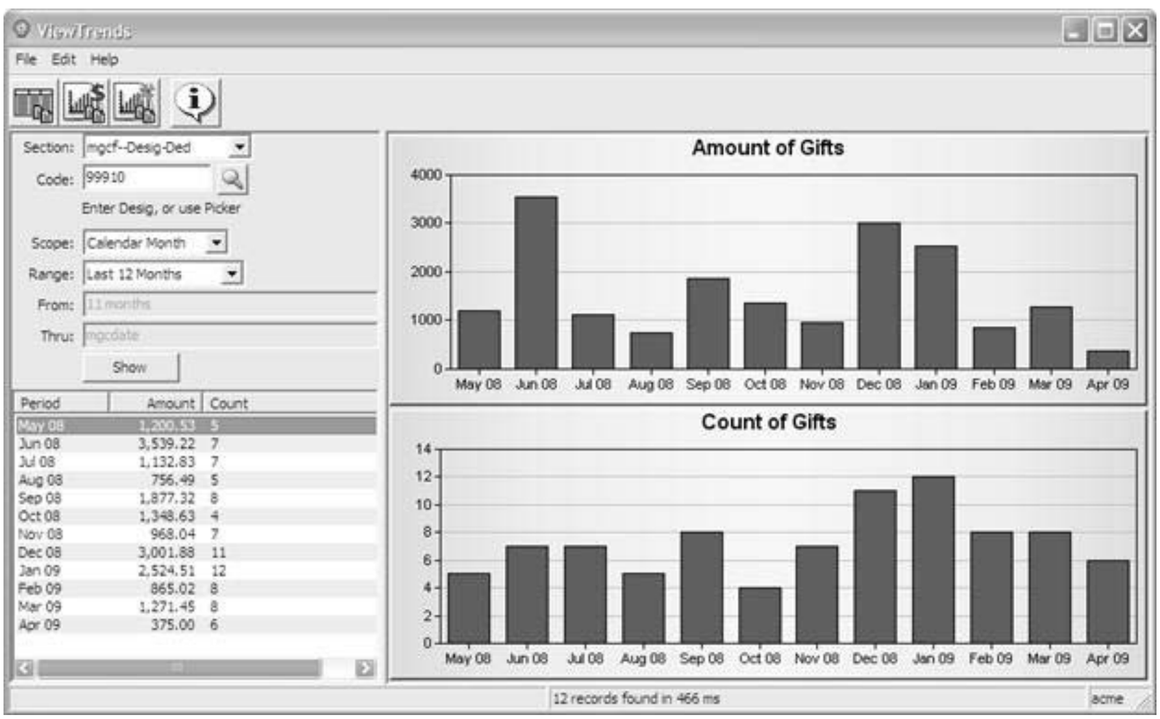
Configuring dasco3 View Trends

“mgc” is an acronym for Management Cumulative (data), a table of data records in dasco that summarizes (primarily) gifts by various attributes (e.g. motivation, designation, gl code) by periods of time (months) for purposes of efficient reporting. Every time you run the Update Management Files process as part of “end of day”, you are summarizing the day’s gifts into this table. Many of the standard dasco reports use this data vs crawling through individual gift records to come up with monthly, yearly, and “lifetime” totals.

“mgc2” is a relatively new summary table that provides a framework for queries and reporting that the structure of the original MGC could not. MGC2 is not so much about the storing the data as it is about providing information in new (and hopefully useful) forms.   MGC2 is the source of data for dasco3 View Trends.

Some of the benefits of “mgc2” are:

- Multiple time periods over which you can summarize data (daily, weekly, monthly, quarterly)
- Longer retention periods (many years vs just 2 fiscal years)
- More complex ways of summarizing data using “custom” fields
- Two-dimensional summaries
- Filtering what gifts are summarized based on attributes of the donor
- Supplies data to the dasco3 View Trends application



Let’s look at how we configure “mgc2” to get where we want to be.

Key documentation link: https://donor.com/manuals/adminref/mgcf2

Summary by Designation

Go to dasco3 Code Manager → Management Cumulative Data

Basic MGC2 Section Definition

Codes

MGC2 Section Definitions

Code	Description	ScopeSet	Opts	Src	Code_key Def	Code_key Desc	Active	Updated
UBGP	Batches by Group	10: MGC2 Scope Set 10	0	1: Gifts	&batchgrp		Y	02/25/09
UREP	mgcf--Rep Inc Ctrs	1.	0	1: Gifts	chstictr		Y	06/26/08
WMDB	mgcf--Desig-nonded	1.	0	1: Gifts	designation		Y	11/15/06
WMDC	mgcf--Desig-Ded	1.	0	1: Gifts	designation		Y	02/18/09
WMIC	mgcf--Income Center	1.	0	1: Gifts	chstictr		Y	12/07/06
WMMC	mgcf--Motiv Cash	1.	0	1: Gifts	hstf.motivation		Y	09/27/06
WMMS	mgcf--Motiv Source	1.	0	1: Gifts	source_motv		Y	09/27/06
WMPZ	Pledged by Desig	1.	0	2: Updated Pledges	pledge_code		Y	12/07/06

Code: A way to identify this data set
Scope set: Defines what time periods by which we want to summarize (see below)
Opts: See https://donor.com/manuals/adminref/codf/xmgsec for options
Src: Where does the data come from? Gifts? Pledges? New Names? Et al
Code_key Definition: What database field or "composite" field is being summarized?
Code_key Description: Define how to get a description for the "code_key" value.

Basic Scope Set

Codes

MGC2 Scope Set 01

Code	Retained Periods	Description	Active	Updated
DAY	0	Calendar Day	N	10/27/06
FDAY	0	Fiscal Day	N	10/27/06
FPRD	0	Fiscal Period	Y	10/27/06
FQTR	0	Fiscal Quarter	Y	10/27/06
FWK	0	Fiscal Week	N	10/27/06
FYR	0	Fiscal Year	Y	10/27/06
LIFE	0	Life	Y	01/27/06
MON	25	Calendar Month	Y	10/03/06
QTR	10	Calendar Quarter	Y	10/27/06
WEEK	0	Calendar Week	N	10/03/06
YEAR	5	Calendar Year	Y	10/03/06

Code – Available time periods (aka "scopes") by which you can summarize data. (only donor.com can create new scopes)
Retained Periods – How long to retain detailed data for this scope within this scope set. The number of periods is always relative to the scope in question. So for the YEAR scope, you define how many years to retain, for MON you tell how many months to retain, for DAY days, etc. For example, for a given section, you may choose to retain YEAR information for 10 periods (10

years), MON detail for 60 periods (60 months or 5 years); QTR detail for 20 periods (also 5 years); WEEK detail for 104 periods (104 weeks or approx 2 years), etc.
Active – For dasco3 View Trends, you must summarize data by LIFE scope (set to Yes/Active). The other scopes can be left inactive, meaning that data will NOT actually be summarized in the mgcf2 table. dasco3 View Trends will still allow you to use an inactive scope, calculating the data "on the fly." However, performance may be slower and other direct query tools (like sql) will be hampered.

Basic Dollar Type Definition

Codes

MGC2 Dollar Type Criteria Def

Code	Description	BaseTypes	BaseTypes	0/1	SubTypes	Active	Updated
WMDB	mgcf--Desig non-deductible	0: 0	N	0: 0		Y	06/02/06
WMDC	mgcf--Desig deductible	0: 0	D	0: 0		Y	06/02/06

Code – Which section is affected by this configuration?
BaseTypes -- 0 = Include; 1 = Exclude
BaseTypes – Choose "base" dollar types to Include/Exclude (e.g. **D**eductible donations; **N**ondeductible Cash, **P**ayments, Gifts in **K**ind)
SubTypes -- 0 = Include; 1 = Exclude
SubTypes – Choose "sub" dollar types to Include/Exclude (e.g. **S**tock Gifts as a subtype of Gifts in **K**ind)

By default, mgc2 data will respect the same configuration you use for mgc in general. For purposes of mgc2 (and View Trends) you can override that configuration with these settings. Fro example, you might include subtype 'S' (stock gifts within Gifts in Kind) without including all Gifts in Kind.)

Key documentation: https://donor.com/manuals/adminref/mgcf2/doltypes

Summarize by Groups of Batch Numbers (CREDIT, MONEY, CASH, EFT, OTHER)

Let's assume that you want to track dollars based on a set of batch number ranges. (Using batch type isn't specific enough for your needs)

Map Batch Numbers to Type with Custom Output Amount Range Table (using Code Manager)

Codes

Amount Range Table H-Batches

Code	Replacement Value	Comment	Active	Updated
00089900	MONEY		Y	02/25/09
00099900	CASH		Y	02/25/09
00199900	EFT		Y	02/25/09
00299900	CREDIT		Y	02/25/09
00999900	OTHER		Y	02/25/09

This groups all batches 100-899 as MONEY batches; 900-999 as CASH, 1000-1999 as EFT, 2000-2999 as CREDIT; and 3000+ as OTHER

A "composite" field that takes batch number and references the above table

```
ACME                 CUSTOM OUTPUT COMPOSITE FILE MAINTENANCE            04/03/09

 File Name: batchgrp    File Description:  Groups batches

 Num  Field                            Description
   1  hstf.batch:amt_rng_tbl_H        Batch Number
```

MGC2 Section Definition – Notice UBGP

Codes

MGC2 Section Definitions

Code	Description	ScopeSet	Opts	Src	Code_key Def	Code_key Desc	Active	Updated
UBGP	Batches by Group	10: MGC2 Scope Set 10	0	1: Gifts	&batchgrp		Y	02/25/09
UREP	mgcf--Rep Inc Ctrs	1.	0	1: Gifts	chstictr		Y	06/26/08
WMDB	mgcf--Desig-nonded	1.	0	1: Gifts	designation		Y	11/15/06
WMDC	mgcf--Desig-Ded	1.	0	1: Gifts	designation		Y	02/18/09
WMIC	mgcf--Income Center	1.	0	1: Gifts	chstictr		Y	12/07/06
WMMC	mgcf--Motiv Cash	1.	0	1: Gifts	hstf.motivation		Y	09/27/06
WMMS	mgcf--Motiv Source	1.	0	1: Gifts	source_motv		Y	09/27/06
WMPZ	Pledged by Desig	1.	0	2: Updated Pledges	pledge_code		Y	12/07/06

MGC2 Scope Set 10

Codes

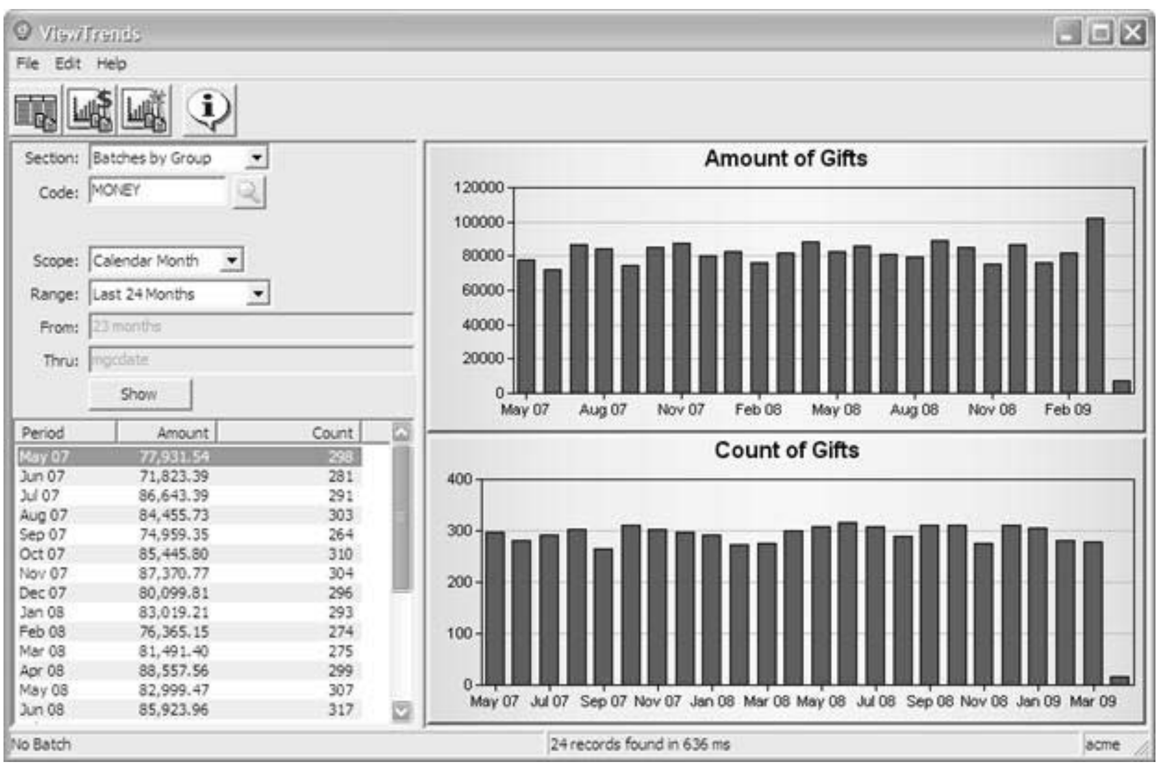
MGC2 Scope Set 10

Code	Retained Periods	Description	Active	Updated
DAY	0	Calendar Day	N	01/27/06
FDAY	0	Fiscal Day	N	01/27/06
FPRD	0	Fiscal Period	N	01/27/06
FQTR	0	Fiscal Quarter	N	01/27/06
FWK	0	Fiscal Week	N	01/27/06
FYR	0	Fiscal Year	N	01/27/06
LIFE	0	Life	N	01/27/06
MON	0	Calendar Month	N	01/27/06
QTR	0	Calendar Quarter	N	01/27/06
WEEK	0	Calendar Week	N	01/27/06
YEAR	0	Calendar Year	N	01/27/06

Notice how everything is marked “inactive”? This means that nothing will actually summarize into the ‘mgcf2’ table when Update Management Files is run. But View Trends can still dig through the dollar history to summarize it “on the fly” (except for LIFE). It might be slow, but it will work. Great way to test things out before Update starts to recognize it.

NOTE: You do NOT have to activate all of the “scopes” in order to use them in View Trends. The program that collects the data for View Trends (getmgc for you programmers) has the ability to scan the dollar history for data that is not already summarized in the mgcf2 table. Ie It can build the data “on the fly”. Depending on the volume of data and scope, this may be slower than if you had the data pre-summarized by Update Management Files.

View Trends – Batches by Group – Money



Here are some results.

Summarize by Groups of Name Types (Individuals, Churches, Business, Other)

Group Type of Name values with Custom Output String Range Table (using Code Manager)

Codes

Type Name Groups - StrRng N

Code	Replacement Value	Comment	Active	Updated
099	INDIV		Y	04/03/09
200	CHURCH		Y	04/03/09
299	OTHER		Y	04/03/09
499	OTHER		Y	04/03/09
999	BUSINESS		Y	04/03/09

Composite Field that takes Type of Name and references the above table

```
ACME                   CUSTOM OUTPUT COMPOSITE FILE MAINTENANCE            04/03/09

 File Name: typengrp    File Description:   Type of name groups

 Num  Field                               Description
   1  pmf.type_of_name:str_rng_tbl_N Type of Name
```

MGC2 Section Definition UTON

Codes

MGC2 Section Definitions

Code	Description	ScopeSet	Opts	Src	Code_key Def	Co
UBGP	Batches by Group	10: MGC2 Scope Set 10	0	1: Gifts	&batchgrp	
UREP	mgcf--Rep Inc Ctrs	10: MGC2 Scope Set 10	0	1: Gifts	chstictr	
UTON	Giving by Type of Na	10: MGC2 Scope Set 10	0	1: Gifts	&typengrp	
WMDB	mgcf--Desig-nonded	1.	0	1: Gifts	designation	
WMDC	mgcf--Desig-Ded	1.	0	1: Gifts	designation	
WMIC	mgcf--Income Center	4.	0	1: Gifts	chstictr	

View Trends – Type of Name Groups – Individuals

Other Ideas?

A word about the Range options

View Trends comes pre-configured with a number of choices for the Range drop down, but you are free to add others that suit your needs.   These simply serve as user-friendly “short cuts” to specifying the time period on which you want to report. These values are passed to the underlying program (getmgc) to export the appropriate data. Of course, the user is always free to specify the exact date range they want for any View Trends results.

For more information on “getmgc” go to https://donor.com/manuals/adminref/tools/getmgc

Here’s a snapshot of some of the Ranges that are preconfigured for your use. Each “scope” has it’s own set of ranges.

Go to Code Manager → Management Cumulative Data → MGC2 Scope XXX Query Ranges (XXX represents the different time periods/scopes, Month, Quarter, Year, et al)

Here's a snapshot of some Monthly Query Ranges

Codes

MGC2 Scope MON Query Ranges

Code	Range Description	From Syntax	Through Syntax	Active	Updated
1	Current Year To Date	first_of year	mgcdate	Y	02/11/09
2	Previous Year	first_of 1 year	last_of 1 year	Y	02/11/09
3	Last 12 Months	11 months	mgcdate	Y	02/12/09
4	Last 24 Months	23 months	mgcdate	Y	02/12/09
5	Last 36 Months	35 months	mgcdate	Y	02/12/09
6	Last 48 Months	47 months	mgcdate	Y	02/12/09
7	Last 60 Months	59 months	mgcdate	Y	02/12/09

Range Description – A "user friendly" description that is displayed in View Trends
From Syntax – The value passed to "getmgc" as the "from" time period
Through Syntax – The value passed to "getmgc" as the "through" time period

Examples using the mgc date of 4/14/09:

- '-scope MON -from 1 month' would result in a date of 3/1/2009
- '-scope DAY -from 1 month' would result in 3/14/2009
- '-scope YEAR -from 1 month' would result in 1/1/2009
- '-scope MON -from first_of 1 month' would result in a date of 3/1/2009
- '-scope DAY -from first _of 1 month' would result in 3/1/20089
- '-scope DAY -from first_of 1 year' would result in 1/1/2008

The special optional word 'first_of' forces the first of the given period.
-last_of identifies the end of the given period.

What Next?

1. Think about how your development staff might want to use View Trends
2. Configure some "mgc2 sections" using a "scope set" that has every scope marked "inactive" (This prevents Update Management Files from actually summarizing the data until you are ready.)
3. While "tinkering", use short-range "scopes" and "ranges" in View Trends for quicker response time.
4. When you are ready, contact donor.com to help generate/build the summary data "retroactively" so that your users enjoy better response times.

Communication Logging

The Communication Logging application is another relatively new feature from donor.com to help you get a better grasp on the history, cost, and responsiveness of each donor to outbound communication pieces. This will help you answer questions such as:

- What communication pieces have been sent to the donor?
- When?
- What prompted the communication?
- Did the donor respond? How?
- How much did it cost to send the communication?
- Which donors have received 24+ appeals and never responded?
- What is the response rate to email blasts?
- What is the "return on investment" for an individual donor, considering what was spent to interact with him or her?

Each outbound communication can have a cost and motivation code associated with it. In some cases, a pre-determined fixed cost is appropriate. (e.g. You determine that it costs your organization $3.50 to process and receipt a donation. So the cost associated with sending a receipt is $3.50.) In other cases, you will be able to specify what cost to apply to the communication.

During the daily "update management files" process (ie closing out a day's batches), the system will try to **exact** match each gift with a recent communication log entry (by motivation) and update that communication record, indicating a gift response. (There is also provision for recognizing a non-exact match between the communication log motivation and the gift motivation. See https://donor.com/manuals/dasco/comlog for more details.)

By linking the incoming responses (gifts) with the outbound communication that generated it, you will be in position to better analyze the true effectiveness of your efforts.

Implementation

The dasco communication log feature comes with a number of pre-defined types of communication. For each type, you can specify the cost associated with it and whether or not you even want to record that kind of communication.

Activate and Configure Types of Communication

Go to dasco3 Code Manager → Communication Log Type

Codes

Communication Log Type

Code	Description	Default Cost Motiv	Motiv	Days	Dups	Active	Updated
AUTOE	Auto Email	0.00		0		Y	03/30/07
EMAIL	Email Campaign	0.49	EA00-0000	0		Y	03/03/09
ERCPT	Email Receipt	0.00		0		Y	03/30/07
EVENT	Event	0.00		0		Y	02/26/09
MAIL	Direct Mail	1.25	LA00-0000	0		Y	03/03/09
ORDER	Order Fulfilment	0.00		0		Y	03/30/07
OTHR	Other	0.00		0		Y	03/13/09
RCPT	Receipt	0.75	XA00-0000	0		Y	03/03/09
TELE	Telemarketing Call	0.00		0		Y	03/30/07

1. **Code** – Internal code value for this type of communication
2. **Default Cost** – The standard cost of sending this kind of communication.
3. **Motivation** – The default motivation code for this type of communication.
4. **Days** -- Communication log records added in the most recent x days will be excluded when matching gift responses to communication records. Why? Let's say that you use a generic motivation code on receipts. e.g. X000-0000 of Xyy0-0000 where yy is changed yearly). That means a donor may have many communication log entries with that same motivation. If you send a receipt today, you don't expect them to be able to respond with another gift for x days (let's say 7 days) So, if you get a X000-0000 gift in say, 3 days, you'd want the gift to be matched up with the communication log entry that is > 7 days ago.
5. **Dups** -- Is it valid to have multiple communication log entries of this type for the same account with the same motivation code? Saying "no" could prevent you from inadvertently uploading the same records twice.
6. **Active** – Say "Yes" to activate this type of entry.

Want to add other types?

Go to dasco3 Code Manager → Communication Log User Types

Works the same as above.

Receipts/Acknowledgements

Communication log records will be added for receipts or acknowledgements under these conditions:

- The communication log type "RCPT" is active (For emailed receipts, the type is ERCPT)Receipts have not been produced yet for that particular day. (ie This is the first time you've produced the receipts ... not a "redo".)
- The segment being merged is a primary document (not a secondary document.)
- The control file's Custom Merge Routine is empty (which i s the default), rcp2email, or SAVE (i.e. other custom merge routines must include a ldcomm command line in order to create communication log entries)
- For receipts, the motivation code comes from the receipt control file. Any lower-case date masks (i.e. yy m) will be replaced.

Bulk Email Blasts (SendWare)

The SendWare Send Bullk Email program will offer you the opportunity to generate communication log entries as part of the act of sending the e-blast. The cost information will come from your configuration of the “type” of communication. The motivation code can come from the mailing list file, the configuration of EMAIL types, or from the value you specify at “run time.”

```
qbulk acme                    Queue Bulk Mail Job                      04/03/09

    Mailing List:
       Spec File:  email.spc
  Text Body File:
  HTML Body File:
 PDF Attach File:
          Sender:  Newsletter@lists.demo.donor.com
     Sender Name:  ACME Ministry
            From:
         Subject:
        Reply To:  inquiry@donor.com
    Fields: Name:  name          Address:                 Format:
  Notify Address:  user@donor.com
     Unsubscribe:
   Comm Log type:  EMAIL
  Comm Log motiv:  EA00-0000
```

1. **Comm Log type** -- What kind of communication type do you want to assign to this e-blast?
2. **Comm Log motiv** – Specify what motivation you want recorded for this communication if there is no motivation in the data file. If blank (and none in the data file), dasco will use your default specified in the configuration for this type of communication.

Direct Mail

To upload Communication Log Entries for a direct mail appeal or newsletter, et al, use the dasco2 Load Communication Log Records feature. It should be found on your Select Functions menu.

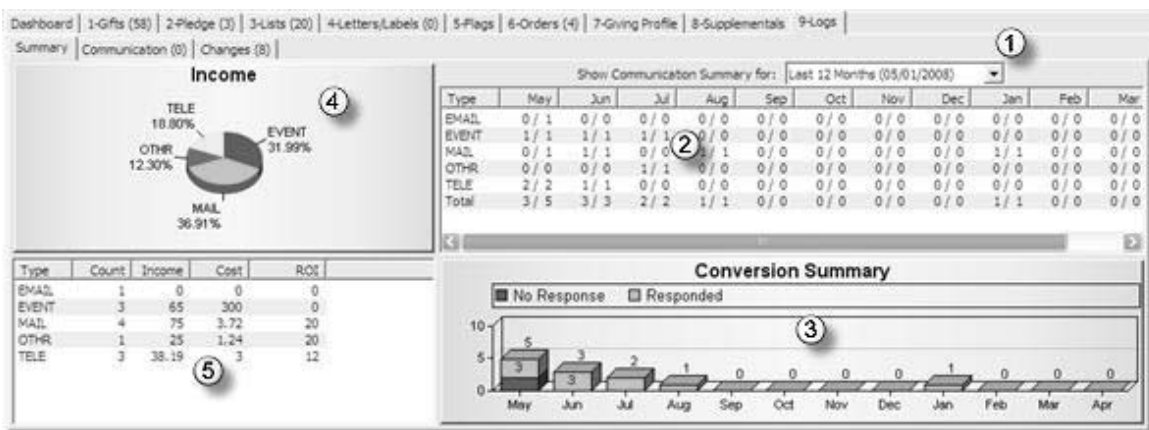
comffile acme   Load Comm Log Records   04/03/09

```
 Load records into the Communications Log for everyone in a file
 === Required values ===
                              Data file:  DRK005.let
                     Communication date:  04/03/09
                     Communication type:  MAIL
 === Optional values ===
                   Secondary motivation:  LA00 -0000
                          Brief comment:
                         Cost per pie ce:
```

1. **Data file** -- Choose the data file containing the records that received the communication piece – presumably a file generated by dasco select functions
2. **Communication date ---** Indicate the date of the communication, presumably some kind of “drop date”
3. **Communication type** – What type of communication was this?
4. **Secondary motivation** – Specify what motivation you want recorded for this communication if there is no motivation in the data file. If blank (and none in the data file), dasco will use your default specified in the configuration for this type of communication.
5. **Brief comment** -- A short comment for each entry. Could be a brief description of the communication piece.
6. **Cost** -- What cost do you want to record for this communication? If left blank, dasco will use your default specified in the configuration for this type of communication. (dasco does not try to figure out the cost from the motivation code itself.)

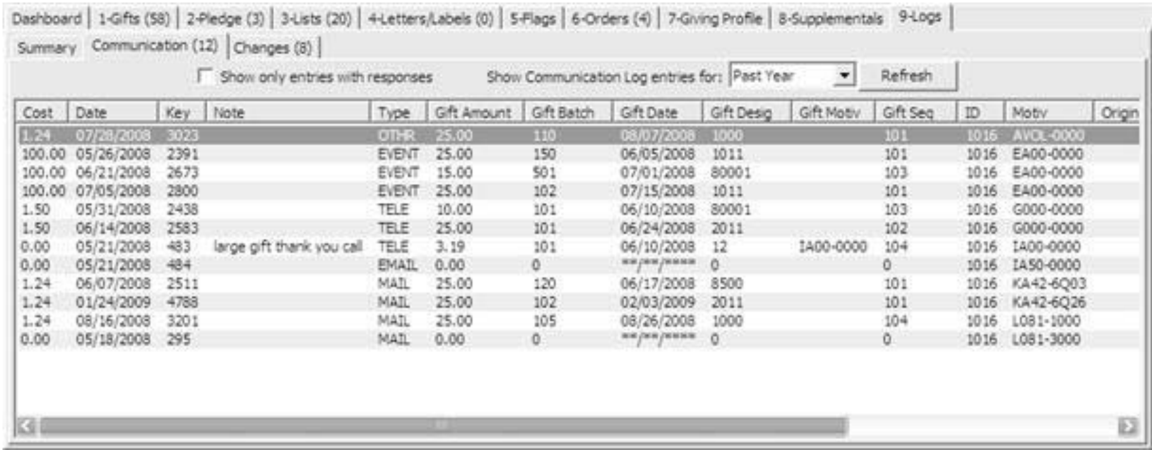
dasco3 –- View Communication Log

For a sample, go to dasco3 ‘jones byron’ in our “acme” database and see how he has responded:



1. **Choose Summary for** – Choose a time frame to review
2. **Data** – Shows each type of communication received and number of responses. (format is # responses / # received)
3. **Conversion Summary** – Chart of responses compared to communications received
4. **Income** – Chart of amount of income for various types of communications received
5. **Income Data** – Number of responses, amount of income, cost, and **individual ROI** (amount/cost). How helpful is that?!

Or see the actual list of communication pieces on the Communication Tab:



Cost	Date	Key	Note	Type	Gift Amount	Gift Batch	Gift Date	Gift Desig	Gift Motiv	Gift Seq	ID	Motiv	Origin
1.24	07/28/2008	3023		OTHR	25.00	110	08/07/2008	1000		101	1016	AVOL-0000	
100.00	05/26/2008	2391		EVENT	25.00	150	06/05/2008	1011		101	1016	EA00-0000	
100.00	06/21/2008	2673		EVENT	15.00	501	07/01/2008	80001		103	1016	EA00-0000	
100.00	07/05/2008	2800		EVENT	25.00	102	07/15/2008	1011		101	1016	EA00-0000	
1.50	05/31/2008	2438		TELE	10.00	101	06/10/2008	80001		103	1016	G000-0000	
1.50	06/14/2008	2583		TELE	25.00	101	06/24/2008	2011		102	1016	G000-0000	
0.00	05/21/2008	483	large gift thank you call	TELE	3.19	101	06/10/2008	12	IA00-0000	104	1016	IA00-0000	
0.00	05/21/2008	484		EMAIL	0.00	0	**/**/****	0		0	1016	IA50-0000	
1.24	06/07/2008	2511		MAIL	25.00	120	06/17/2008	8500		101	1016	KA42-6Q03	
1.24	01/24/2009	4788		MAIL	25.00	102	02/03/2009	2011		101	1016	KA42-6Q26	
1.24	08/16/2008	3201		MAIL	25.00	105	08/26/2008	1000		104	1016	L081-1000	
0.00	05/18/2008	295		MAIL	0.00	0	**/**/****	0		0	1016	L081-3000	

Other Ideas?

What Next?

1. Consider what types of outbound communications you want to track in this way.
2. Determine a default cost for each type.
3. Determine a default motivation for each type.
4. Complete the configuration
5. Contact donor.com if you have mailing history or other communication history in your database in some other form AND you would like us to help you move that data into the official communication log.

E-Receipting

Interested in "going green?" Want to give your donors the option to go "paperless?" Looking to save on postage costs while still receipting gifts in a timely manner? Want to encourage your donors to complete the giving cycle by giving "online"?

All of these are valid reasons to consider donor.com's "e-receipting" feature.

E-Receipts are built right into the dasco daily receipt segmentation and production process, so there is no additional effort required on a day-to-day basis.

Here are the things to consider:

- You, obviously, must have an email address for the donor (EML record). Be sure that the record indicates if they wish to receive TEXT or HTML-based emails from you. (Some people use an email program that can receive only TEXT, so be sensitive to that.)
- You should also have a mechanism for identifying donors who prefer receipts by email. Remember, some who give on-line may still prefer a paper receipt. donor.com recommends that your Receipt Preference Flag be used to specify "Electronic Receipts". (Contact us if you need help setting up such an option.)
- If you want the email message to be "segment-specific" (have different language for different receipt segments), you will need to adjust your receipt segmentation plan (aka "rules") to split each segment into two distinct segments ... one for email receipts and one for paper receipts.
- The same merge fields used in paper receipts are available to e-receipts. However, the field names may be different. E-receipts use standardized merge field names while paper receipts use customized field names. For the field names used by e-receipts, run dasco report 3070 (Receipt Output File Layout). This report will document the field names that match your receipt profile/configuration, including optional or "custom" fields.
- E-receipts are generated and delivered as a normal part of the Segment and Produce Receipts processes along with the paper receipts. No extra steps are required.
- A notification report will be generated to document which receipts were sent electronically. If you have more than one e-receipt segment, you will get a notification email for each segment.
- **Coordinate the implementation of this carefully** with the production of your paper receipts. As soon as you implement e-receipting by adding the new fields to your Receipt Name Custom Output Definition, **your paper receipt process will be affected!**

Let's walk through what it takes to implement e-receipting.

(Key documentation link: https://donor.com/manuals/dasco/sysadmin/ereceipts)

Global Settings

sender_name = Acme Ministry
sender_email = e-receipts@acme.com (email address of sender)
replyto = donorservices@acme.com (receipient of any replies)
notify_email = donorservices@acme.com (receives a report of emails sent)
subject = Your E-Receipt from Acme Ministry
gifts_per_row = 5 (Number of designation splits your paper receipts allow per receipt. If not specified, default is 5. See your Receipt Profile under Code Manager if you're not sure.)

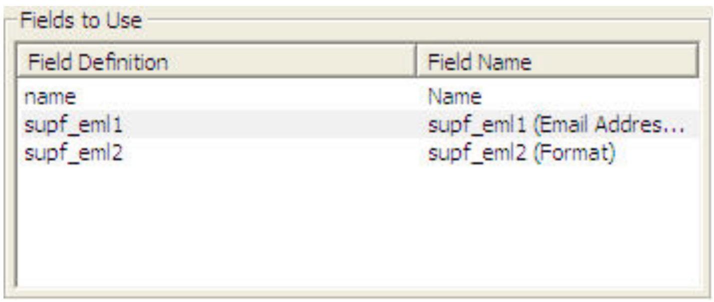
Email Templates

You will need both TEXT and HTML templates for the E-Receipts.
Sample templates with some basic elements can be downloaded below. The file names must be:
EMAIL-RECEIPT-XX-HTML.txt
EMAIL-RECEIPT-XX-TEXT.txt
where xx is the receipt segment you are using for your E-Receipts.

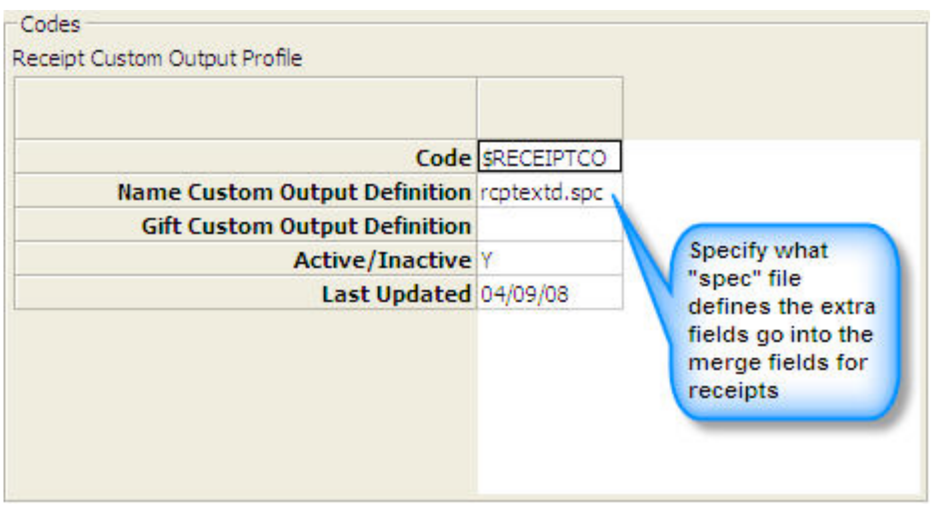
Once you have prepared the files for your organization, upload them to files.donorware.net to the dasco/rcptrgt/templates folder.

Receipt Custom Output Profile

In order to make the email address and email format preference (TEXT or HTML) available to the email program, you must have a "custom output spec file" that has <u>at least</u> the following fields in it:



rcptextd "spec file"



Update the Receipt "variables" file for ALL receipts

Update the "vars.rcp" file (and any other custom files you might be using) for your paper receipts to also recognize these new fields (even if they are not going to be used).

Determine the list/segment code

Go to Receipt Segmentation Maintenance and create a list/segment for Electronic Receipts (you can have more than one) just like you do for a paper receipt. Identify those who are to receive e-mail receipts. Create a "rule" or priority line that has at least these criteria:

- Criteria 70 - Sup Kind From EML to EML
- Criteria 101-122 - Use your organization's Receipt Preference Flag and segment by the value that stands for "Electronic Receipts" (or the equivalent)

Of course, you can also specify other criteria as appropriate for your strategy. Assign them to an e-receipt list

Prepare the control file

Create a "control file" for each e-receipt segment. Specify **'rcp2email'** as the Custom Merge Routine. You can also specify a motivation code that you want on the receipt for any return receipt gifts. The other values are ignored.

Ideas and Questions?

What next?

1. Consider how you might benefit from offering e-receipting to your donors.
    a. Save on postage costs
    b. Save on personnel costs (no more printing receipts, stuffing envelope, and licking stamps!)
    c. Deliver receipts and, more importantly, thank you letters faster.
    d. Build "good will" with your donors who prefer to go "paperless"
2. Design the text and html versions of your e-receipt. Be sure to give your donors a way to "give again" that is also paperless!
3. Configure your receipt segmentation "rules" and production to be ready to honor each donor's preference
4. Start publicizing the option on your web site and on your paper receipts.
5. Make it easy for your donors a way to "opt in" on your donor.com-powered web site via your "preferences" page.
6. Enjoy the benefits

What else is on your mind?

Q&A on these or any other donor.com tools and services