

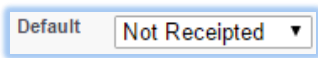
YFC Receipting Workflows v1.2

Updated 4/29/2015

Purpose: To fix issues and address misunderstandings with the YFC Receipting workflows.

What YOU MUST DO before activating the workflows:

1. Edit the "General Donation Receipt" email template to customize it for your chapter.
2. Change the default "Receipt?" value on the **Donation** object:
 - a. Go to the **Setup** menu.
 - b. Type opportunities in the setup search box.
 - c. From the list of setup menu options, navigate to **Opportunities > Record Types**.
 - d. For each YFC opportunity record type (Donation, Grant, In-Kind, Stock):
 - i. Click on the record type label/name.
 - ii. In the **Picklists Available for Editing** section, find "Receipt?" and click **Edit**.
 - iii. Change the **Default** value to "Not Received".



Fields associated with the workflows

The following fields are associated with the receipting workflows. Throughout this document, many references to these fields will be made, so a clear understanding of the fields is needed.

1. Preferred Receipt Type

The "Preferred Receipt Type" field on the **Individual** object is the primary trigger for receipting. Different automated actions are preformed depending on this value. The screenshot below shows the position of this field on the page layout:

Individual Detail

Edit Delete Relationships Viewer Virtual Terminal

Contact Details

Name	Matt Foster		Contact Owner	Matt (YFCDE)
Nickname		Birthdate	4/22/1985	
Account Name	<u>Matt and Abby Foster Household</u>	Deceased		
Gender	Male			
Inactive?	<input type="checkbox"/>	Staff Relationships (auto updated)	Meleea Russell	
Gives Anonymously?	<input type="checkbox"/>	Staff Donation Relationships (auto)	Meleea Russell;	

TAKE GOOD RELATIONSHIP NOTES

CONTACT NOTES Met Matt at local community event. Said is very interested in Golf.

Development Information

Ministry/Mailing Interest	Campus Life Updates; City Life Updates; Executive Director; General Mailer	Monthly Support? Amount	\$50.00
Communication Pref.	Email Only	Meet with ED?	YES
Area of Interest	Basketball; Financial / Investing; Fitness	Donor Opportunity per/yr	\$2,500-\$4,999
Fundraising Interest	Camp	Preferred Method of Giving	Mail Check
		Preferred Receipt Type	Both

2. Receipt?, Receipt Email Sent, and Date Receipt Sent

The “Receipt?”, “Receipt Email Sent”, and “Date Receipt Sent” fields on the donation object are the fields that are automatically modified by the workflows. These fields are in the **Receipt Information** section on the donation record. The screenshot below shows the position of the fields on the page layout:

Donation Detail Edit Delete Clone Split

Opportunity Record Type YFC Donation [\[Change\]](#)

Donation Information

Opportunity Name	Matt Foster Donation (2) 2/18/2016	Donation Type	
Account Name	Matt and Abby Foster Household	Check #	
Designation		Amount	\$1,000.00
Sub-Designation		Stage	Pledged
Staff Association		Close Date	2/18/2016
		Probability (%)	50%

Donation Note

Description

Receipt Information

Receipt?		Date Receipt Sent	
Receipt Email Sent	<input type="checkbox"/>		

What the workflows do and how they work

Upon a “new” creation of donation record (C&P Terminal/Batch Data Entry/ [New Donation](#)), different automated actions are taken depending on the individual’s “Preferred Receipt Type”. These actions are described below.

- Both or <blank>: [Preferred Receipt Type](#) [Both](#) OR [Preferred Receipt Type](#)
 - The receipt email will be sent.
 - The “Receipt?” field will be set to **Not Received** and will be visible in the “Receipts to be sent” report/list view for paper receipts.
 - The “Receipt Email Sent” field will be checked () as verification that the email was sent.

Receipt Information

Receipt?	Not Received	Date Receipt Sent	
Receipt Email Sent	<input checked="" type="checkbox"/>		

- Electronic: [Preferred Receipt Type](#) [Electronic](#)
 - The receipt email will be sent.
 - The “Receipt?” field will be set to **Received**.
 - The “Date Receipt Sent” field will be set to today’s date.
 - The “Receipt Email Sent” field will be checked () as verification that the email was sent.

Receipt Information

Receipt?	Received	Date Receipt Sent	4/29/2015
Receipt Email Sent	<input checked="" type="checkbox"/>		

- Paper: Preferred Receipt Type 📄 Paper
 1. The “Receipt?” field will be set to **Not Receipted**.
 2. (All other receipt fields will be left blank and no receipt email will be sent.)

Receipt Information

Receipt?	Not Receipted	Date Receipt Sent 📅
Receipt Email Sent	<input type="checkbox"/>	

- Year-end only: Preferred Receipt Type 📄 Year-end only
 1. The “Receipt?” field will be set to **Do Not Receipt**.
 2. (All other receipt fields will be left blank and no receipt email will be sent.)

Receipt Information

Receipt?	Do Not Receipt	Date Receipt Sent 📅
Receipt Email Sent	<input type="checkbox"/>	
