Agency and Donor Document Emailing

Purpose of this document

Ceres offers the functionality for emailing of receipts to donors and emailing of orders, invoices, and statements to agencies while providing some flexibility to handle varying email requests. This is in addition to the original manual email capability provided in Ceres.

Ceres Object release 5.00.00 is required for the functionality described in this document.

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Overview

The following features are available related to the emailing of agency and donor document functionality.

1. Document Email options for donors and agencies to conditionally receive documents via email
2. Specifying email addresses on the Donor Card and the Agency Card, designating who will receive document emails
3. Designating internal group distribution email cc for donation receipts based on the FBC Product Category of the donation order
4. Sending posted donation receipts and posted agency invoices
5. Sending donation order confirmations and agency order confirmations
6. Reports - Donation Summary, Posted Donation Receipt, Batch Email Donation Receipts, and Generate E-Statements

Setup

Company Setup

In the Company Information setup, you can designate who the various automatic emails are from.

1. To access the Company Information, go to Departments → Administration → Application Setup → General → Tasks → Company Information.
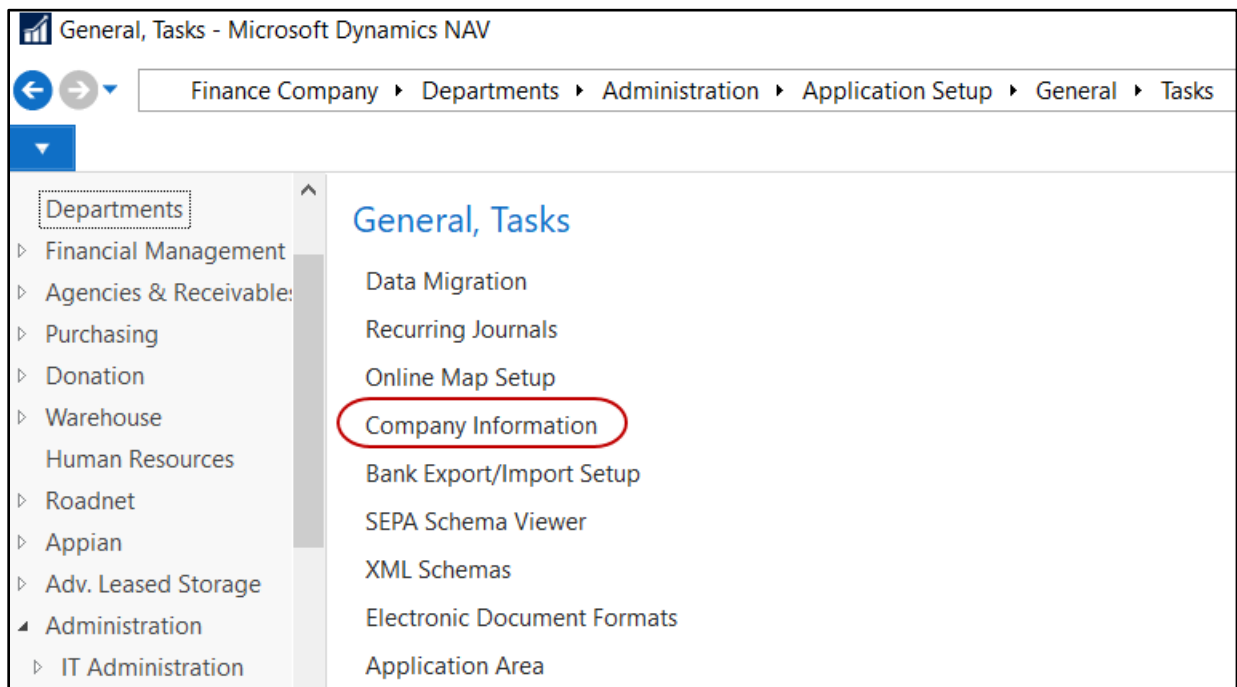
2. On the Communication FastTab, input the email address of the person who you want the emails to be sent from. This can be a generic company email address as long as it is a valid address.

Agency Setup

Agency document recipients and frequency standards are setup on the Agency Card.

1. Open the Agency List and select an agency of your choosing. Update the fields on the Address & Contact FastTab of the Agency Card.

Invoice Delivery Email: Enter the email address of the person who you want the agency invoice emailed to.

Invoice Delivery Email cc: Enter the email address of the person you want to cc when the agency invoice is emailed.

Statement Delivery Email: Enter the email address of the person who you want the agency statement emailed to.

Statement Deliver Email cc: Enter the email address of the person you want to cc when the statement is emailed.

Document E-Mail Option: Select one of the options based on when you want the emails sent.

> **Blank** - No Email will be sent. This indicates that Ceres should print the invoice.

> **On Post Only** - Send Email with pdf attachment when the User selects the Post option on the agency order.

> **On Post and Print only** - Send email with pdf attachment when the User selects the Post and Print option on the agency order. Ceres will also print the invoice.

> **Batch Posting -** Send email with pdf attachment when the User selects the Post Batch option on the agency order list. A pdf version of the invoice will be created and emailed to each agency included in the batch having this option selected.

> **All Posting** - Send email with pdf attachment when the User selects the Post or Post and Print option on the agency order, or the Post Batch option on the agency order list.

> **Manual - With Warning on Post -** An email will not automatically be sent when the agency order is posted. Instead a warning will appear during posting letting the user know an email was not sent.

> **Manual – Without Warning on Post** - An email will not automatically be sent when the agency order is posted nor will a warning display.

Email Statement: Place a check mark in this field to email a Statement to this agency when the General Email function is run. This will automatically un-check the Print Statements field and vice versa. Checking the Email Statements does not prohibit you from printing a hard copy of the Agency Statement or Parent Agency Statement.

2. To use one of the Document Email Option options, other than Blank, you must have an email address populated in the Invoice or Statement fields. Ceres will warn you if you try to select an option without an email address in the Invoice Delivery Email or Statement Delivery Email field.

3. If an agency no longer wants their documents automatically sent via email, set the Document Email Option field to Blank, and remove the check mark from the Email Statement field.

Donor Setup

Donor document recipients and frequency are set up on the Donor Card.

1. Open the Donor List and select a donor of your choosing. Update the fields on the Invoicing FastTab of the Donor Card.

Receipt Delivery Email: Enter the email address of the person you want the receipt emailed to.

Receipt Delivery Email 2: Enter the email address of the person you want to cc when the receipt is emailed.

Receipt Email Options: Select one of the options based on who and when you want the emails sent.

Blank - No email will be sent. This indicates that Ceres should print the receipt.

On Post Only - Send email with pdf attachment when the User selects the Post option on the donation order.

On Post and Print only - Send email with pdf attachment when the User selects the Post and Print option on the agency order. Ceres will also print the receipt.

Batch Posting - Send email with pdf attachment when the User selects the Post Batch option on the donation order. A pdf version of the donor receipt will be created and emailed to each donor included in the batch having this option selected.

All Posting - Send email with pdf attachment when the User selects the Post, Post and Print, or the Post Batch option on the donation order.

Manual – With Warning on Post - An email will not automatically be sent when the order is posted. Instead a warning will appear during posting letting the user know an email was not sent.

Manual – Without Warning on Post - An email will not automatically be sent when the donation order is posted nor will a warning display.

2. To use one of the Receipt Email Options, other than Blank, you must have an email address populated in the Receipt Delivery Email field. Ceres will warn you if you try to select an option without an email address in the Receipt Delivery Email field.

PD00001 · Cookies On Demand

❌ E-mail address has invalid format. (Select Refresh to discard errors)
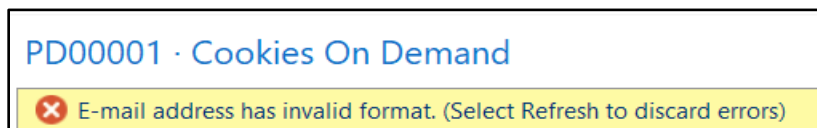
4. If a donor no longer wants their documents automatically sent via email, set the Receipt Email Option field to Blank.

FBC Product Category Code Setup

A Receipt Delivery Email CC field was added to the FBC Product Categories so various staff can be notified for specific types of donor receipts.

1. Go to Departments →Financial Management → Inventory → Administration → Setup→ Food Bank Number Codes → FBC Product Categories.

2. Click on FBC Product Categories. The FBC Product Categories Page opens, as shown below.
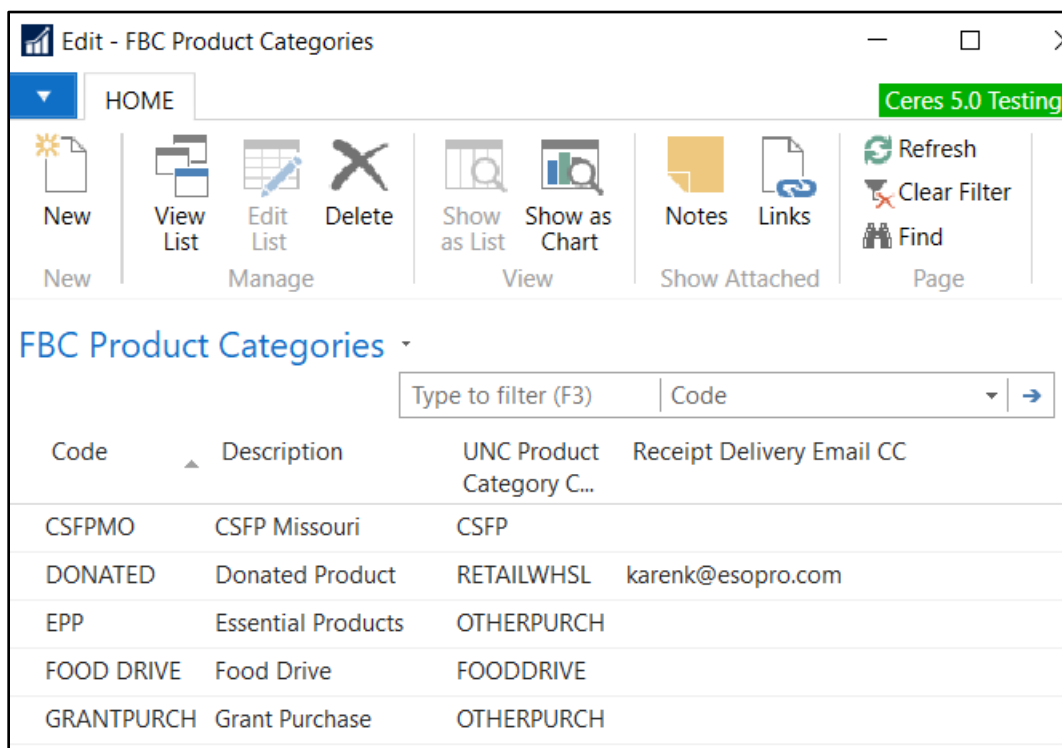
3. You can add the email address in the Receipt Delivery Email CC field for each category code. When the Code is used on a donation order, the recipient will receive a delivery receipt email as a carbon copy when a donation receipt is emailed to the donor.

Document Email Template Setup

Document Email Templates allow for a standardized format where you can enter pre-defined text that is used in the emails that are generated.

1. To access go to Departments → Administration → Application Setup → General → Lists → Document Email Templates.
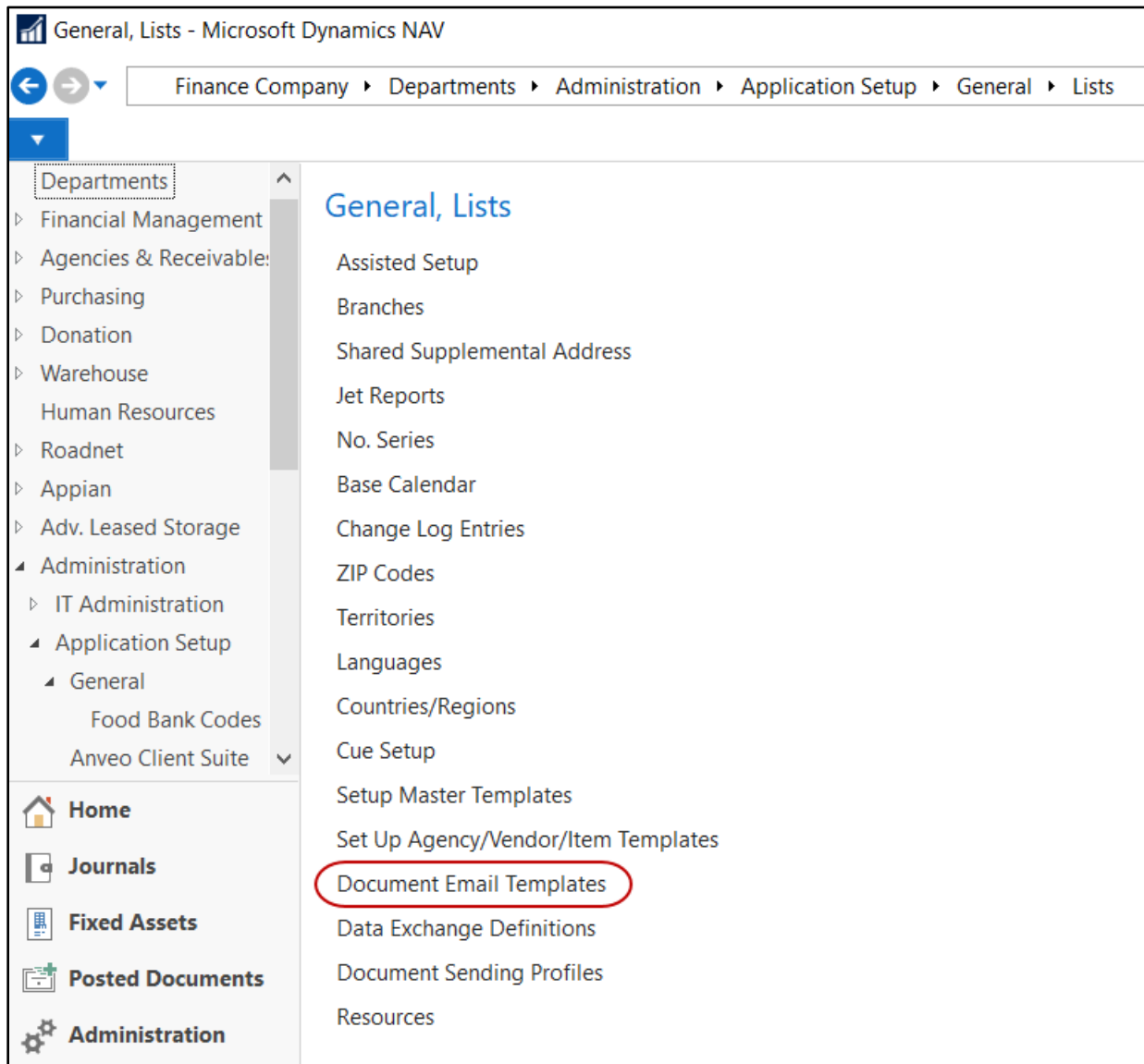
2. A List of the Templates that have been setup will display.

3. Select Home → New to create a new template.

4. On the General FastTab of the Documents Email Card, update the fields as needed.

Type: Designates the type of Templates. Click on the down arrow to right of the field to select an option. There can only be one Template per Type.

Subject Line: Enter the text that will display in the Subject Line of the email. The options are Donor Receipt, Agency Order, Agency Invoice, Agency Statement, or Donor Return.

5. In the Description field in the Document Email Subform, you can define what will print in the body of the email. The Legend on the General FastTab provides a list of substitution characters that can be used to customize the Subject Line and Body text. The actual values of the document fields described in the Legend replace the substitution characters (%1, %2, %3, etc.) in the email that is sent.

For example, %3 (Agency Invoice No.) and %4 (Agency Invoice Document Date) have been used in the Template example below.

6. Values that can be defined on the various documents are.

**Donation Receipt**: Donor Name, Donor Contact, Document No, and Document Date.

Donation Order: Donor Name, Donor Contact, Document No., and Document Date.

**Agency Order & Agency Invoice**: Agency Name, Agency Contact , Document No, Document Date, and Shopper Name.

Workflow

Once all the setup is completed, sending emails within Ceres can be completed from agency orders or donation orders based on the receipt email option that was selected in the setup, such as on Post and Print. In addition, you can send emails via a posted donation receipts or posted agency invoices.
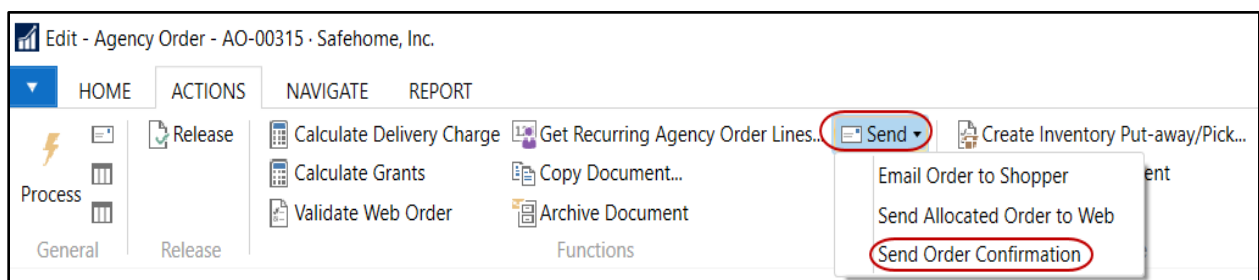
1. Navigate to the respective posted documents and open the document.

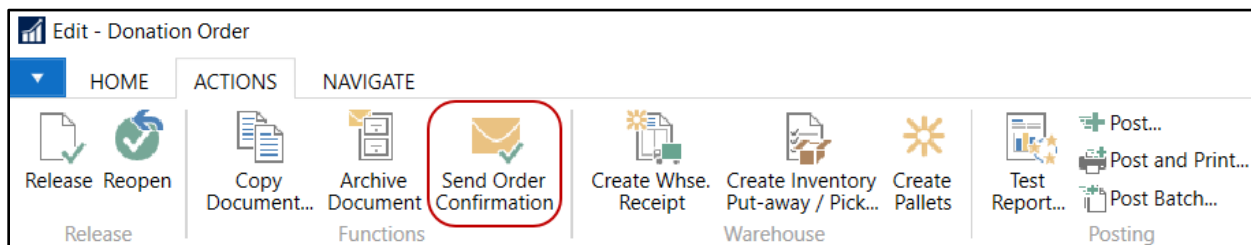2. From a posted agency invoice, select Actions → Send Invoice.
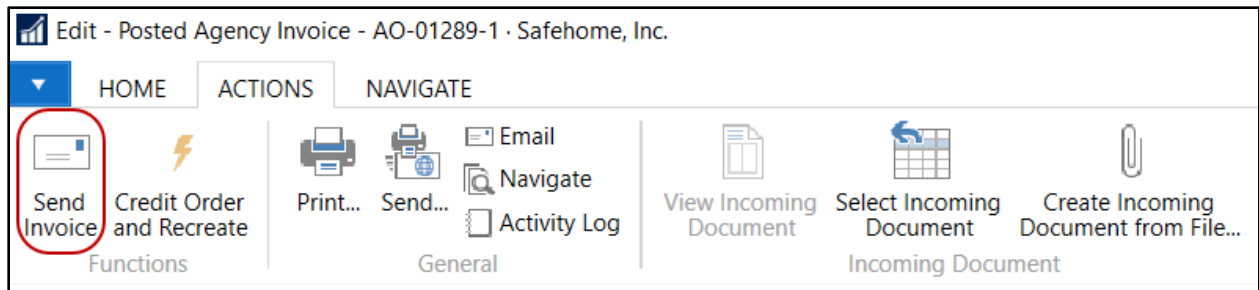
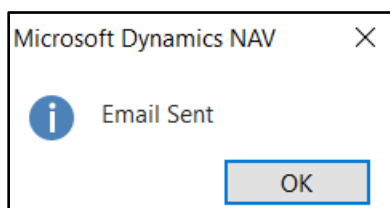3. From a posted donation receipt, select Actions → Send Receipt.
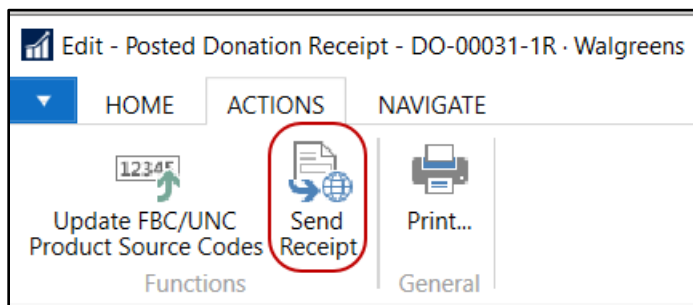
4. From an agency order you can email an order confirmation from Actions → Send → Send Order Confirmation.

5. From a donation order you can email an order confirmation from Actions → Send Order Confirmation.

6. Once the email has been sent, a message will pop up indicating as such.

7. When sending a donation receipt, a signature is appended on the document. This is possible by importing your signature in the Donation Setup Page.

8. To add your signature or logo, go to Departments → Donation → Administration → Setup → Donation Setup and click on the Delivery Email FastTab. Right-click in the signature image box and then click on Select Picture. Browse to the file where the signature is saved and click Open. The file that was imported will now display in the signature box
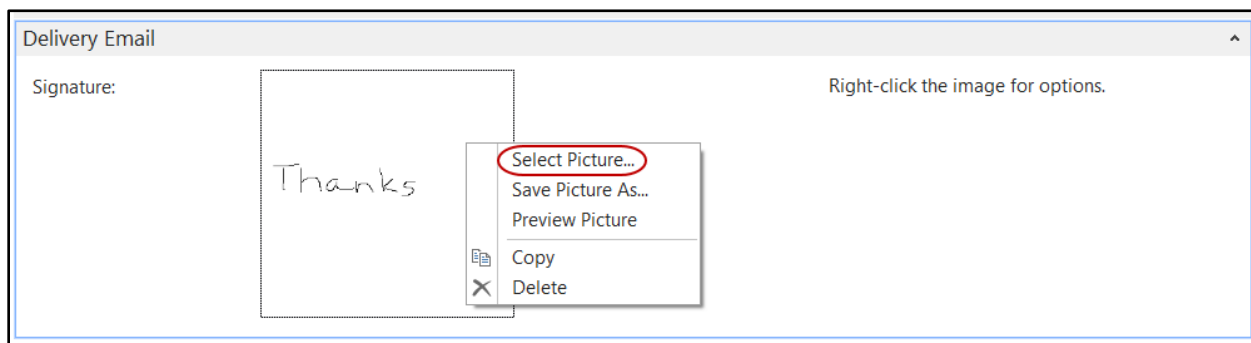
Reports and Periodic Processes

The Emailing Agency and Donor Documents functionality supports the following reports and processes.

1. Donation Receipt Summary
2. Batch Email Donation Receipts (routine and report)
3. Generate Agency E-Statements (routine and report)
4. Posted Donation Receipt has been enhanced

Donation Receipt Summary Report

The Donation Receipt Summary report displays all the information shown on the posted donation receipt including a signature if imported.

1. To access the Donation Receipt Summary report, go to Departments → Donation → Reports and Analysis → Donations Receipts Summary.

2. On the Actions Tab, place a check mark in the Summarize by Item field to summarize the report by item. On the Donor Tab, set a Donor No. filter and update the date range specified in the Date Filter field. Other filters can be set based on how you want to run the report.

3. Click Preview or Print. Below is an example of the report.

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Donation Receipts Summary

April 1, 2020

Donor: PD00001   Address: Name 2   Phone: 913 281 7300
        Cookies On Demand   5252 Speaker Road   Eric Stanley
                                        Kansas City, KS 66106

Thanks for the donation!
The Food Bank is a tax-exempt organization as described in Section 501 (c) (3) of the Internal Revenue Code.

From March 1, 2020 through March 31, 2020

Date	Receipt #	Item No.	Description	Quantity	Unit	Weight
3/3/2020	DRO-00041-1RS	10018R	Raspberry Syrup	-70	CASE	-1,260
3/19/2020	DO-00356-1R	10040	Napkins	120	CASE	3,120
3/24/2020	DO-00478-1R	10799P	Cereal - Cheerios	120	CASE	1,320
3/24/2020	DO-00478-1R	10799P	Cereal - Cheerios	100	CASE	1,100
3/24/2020	DO-00478-1R	10799P	Cereal - Cheerios	90	CASE	990

Total Weight   5,270

Thanks

Posted Donation Receipt Report

1. To access the Posted Donation Receipt Report, go to Departments → Donation → Archive → Posted Donation Receipts.

2. From the Posted Donation Receipts List, select the receipt you would like to print. Then select Actions → Print.

3. On the Options Tab, place a check mark in the Print Company Address field to print the company address.

4. Click Print or Preview. Below is an example of the report.

Ceres 5.0 Testing
100 Main Street
Kansas City , MO 64127

DONATION RECEIPT

Donor Receipt Number: DO-00007-1R
Donor Receipt Date: 8/7/2014
Page: 1

From: Cookies
      Mailing Address
      Portland, OR 97015

To: Grocery Rescue

Ship Via
Receive By
Notice No.
Donor ID   PD00001

Order No.   DO-00007
Order Date   8/7/2014
Product Source   LOCAL
Product Category   DONATED

Thanks for the donation!
The Food Bank is a tax-exempt organization as described in Section 501 (c) (3) of the Internal Revenue Code.

Item No.	Description	UOM	Quantity	Weight	Extended Weight	Location Code	Bin Code	Pallet No.
HS0026	HS Baby Wipes 9 / 90 ct packs	Case	10	14	140	GR	GR	1305-00277
HS0026	HS Baby Wipes 9 / 90 ct packs	Case	20	14	280	GR	GR	1305-00278

Thanks

Total Extended Weight   420

Batch Email Donation Receipt Report

The Batch Email Donation Receipt report has the ability to send emails as pdf attachments to the donor. The pdf attachment can be Per Summary or Per Receipt. For Per Receipt, Ceres will send a separate email for each posted receipt, while the Per Summary option will send a summary of all the posted receipts based on the date range specified.

1. To run the Batch Email Donation Receipt Report, go to Departments → Donation → Order Processing → Tasks → Batch Email Donation Receipts

2. On the Options Tab, select Per Receipt, Receipt Summary, or Receipt Summary by Item. On the Donor Tab, set a Donor No. filter and update the date range specified in the Date Filter field. Other filters can be set based on how you want to run the report.

3. Click Preview. Ceres will email the donor multiple donation receipts if Per Receipt was selected, or one Donation Receipt summarizing all the receipts if Receipt Summary or Receipt Summary by Item is selected. Regardless of which option is selected, the receipts that were sent and/or summarized will display.

Preview of receipts that were included in the Donations Receipt Summary

Batch Email Donation Receipts		4/2/2020 11:36 AM
		Page 1
Ceres 5.0 Testing		ESOPRO\KJK
No.: PD00001, Date Filter: 01/01/20..03/31/20		
Report Option: Receipt Summary		

No.	Name	Receipt No.
PD00001	Cookies On Demand	
		DO-00302-4R
		DO-00303-2R
		DO-00317-1R
		DO-00340-1R
		DO-00350-1R
		DO-00356-1R
		DO-00360-1R
		DO-00394-1R
		DO-00439-1R
		DO-00440-1R
		DO-00461-1R
		DO-00478-1R
		PO-00341-1R

Donations Receipts Summary that was emailed

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Donation Receipts Summary

April 2, 2020

Donor: PD00001
    Cookies On Demand

Address: Name 2
    5252 Speaker Road
    Kansas City, KS 66106

Phone: 913 281 7300
    Eric Stanley

Thanks for the donation!
The Food Bank is a tax-exempt organization as described in Section 501 (c) (3) of the Internal Revenue Code.

From January 1, 2020 through March 31, 2020

Date	Receipt #	Item No.	Description	Quantity	Unit	Weight
1/27/2020	DO-00440-1R	10018	Chocolate Sryup	100	CASE	1,800
1/27/2020	DO-00440-1R	10018	Chocolate Sryup	100	CASE	1,800
1/27/2020	DO-00440-1R	10018	Chocolate Sryup	100	CASE	1,800
1/27/2020	DO-00440-1R	10018	Chocolate Sryup	100	CASE	1,800
1/27/2020	DO-00440-1R	10018	Chocolate Sryup	100	CASE	1,800
2/11/2020	DO-00461-1R	10018	Chocolate Sryup	50	CASE	900
1/2/2020	DO-00439-1R	10018R	Raspberry Syrup	100	CASE	1,800
1/2/2020	DO-00439-1R	10018R	Raspberry Syrup	100	CASE	1,800
1/2/2020	DO-00439-1R	10018R	Raspberry Syrup	100	CASE	1,800
1/2/2020	DO-00439-1R	10018R	Raspberry Syrup	100	CASE	1,800
1/2/2020	DO-00439-1R	10018R	Raspberry Syrup	100	CASE	1,800
1/2/2020	DRO-00040-1RS	10018R	Raspberry Syrup	-30	CASE	-540
1/2/2020	DRO-00040-1RS	10018R	Raspberry Syrup	-100	CASE	-1,800
1/2/2020	DRO-00040-1RS	10018R	Raspberry Syrup	-100	CASE	-1,800
1/2/2020	DRO-00040-1RS	10018R	Raspberry Syrup	-100	CASE	-1,800
1/2/2020	DRO-00040-1RS	10018R	Raspberry Syrup	-100	CASE	-1,800
3/3/2020	DRO-00041-1RS	10018R	Raspberry Syrup	-70	CASE	-1,260
3/19/2020	DO-00356-1R	10040	Napkins	120	CASE	3,120
1/29/2020	DRO-00006-1RS	10040S	Napkins	-485	CASE	-12,610
3/24/2020	DO-00478-1R	10799P	Cereal - Cheerios	120	CASE	1,320
3/24/2020	DO-00478-1R	10799P	Cereal - Cheerios	100	CASE	1,100
3/24/2020	DO-00478-1R	10799P	Cereal - Cheerios	90	CASE	990

Total Weight   3,820

Thanks

Generate Agency E-Statement Report

The Generate Agency E-Statement report allows you to email the agencies their statements, individually or as a batch.

1. To run the Generate E-Statement report, go to Financial Management → Receivables → Documents → Generate E-Statement.

2. On the Options Tab, select options based on how you want to present the Statements. On the Agency Tab, set an Agency No filter and update the date range specified in the Date Filter field. Other filters can be set based on how you want to run the report.

3. Click OK. Ceres will email the Agency their Statement.

Agency Stmt Attached

WW   William Hart
      To   ○ Karen Kopplien

PDF   1050-A_12-01-19__12-31-19_Agency Statement.pdf
      190 KB   ⌄

      ⊚ You may have outstanding tasks for William Hart. Would you like to review now?
      See my tasks   Feedback

Connie Winterfield - Attached is a copy of your Statement dated 12/31/19 for 12/31/19

Ceres 5.0 Testing
100 Main Street
Kansas City , MO 64127
333-333-3333
www.esopro.com

                                          eSoftware Professionals

Safehome, Inc.   **STATEMENT**
2000 Old Line Avenue
Kansas City , MO 64127   Statement Date: 3/31/2020

                                          Agency ID: B0129

                                          Page: 6

                                          Amount Remitted
                                          _____

Document	Date	Description	Transaction	Debits	Credits	Balance
AO-01302-1	3/16/2020	Order AO-01302	Invoice	20.72		19,522.98
AO-01303-1	3/16/2020	Order AO-01303	Invoice	20.72		19,543.70
AO-01310-1	3/24/2020	Order AO-01310	Invoice	167.80		19,711.50
AO-01309-1	3/31/2020	Order AO-01309	Invoice	1.90		19,713.40
			Statement Balance	19,713.40	0.00	19,713.40

Related Topics

1. Agency Overview
2. Parent Agency Overview
3. Donor Overview
4. Parent Donor Overview
5. Agency Order Overview
6. Donation Order Overview