# How to Print a QuickBooks Sales Receipt as a Donor Thank You Letter

## Using QuickBooks Premier Nonprofit Software

Here's a way to streamline the important task of sending thank you letters to your donors. When you enter the donation on a sales receipt in QuickBooks, create a thank you letter to your donor at the same time! By creating the sales receipt in QuickBooks you can accomplish three things at once:

1. Capture the donation for accounting purposes.
2. Capture the donation for donor management purposes (if you are using QuickBooks as your donor management software).
3. Create the donor thank you letter.

What could be easier?

To create the thank you letter, you first need to designate a field in the customer record for the salutation of your letter, i.e., "Dear Bob."

The best field I've found that's currently available is the Account No. field on the Payment Settings tab of the customer record. (Unless of course you already use this field, but I've never run into anyone using it.) You can enter the salutation of your letter, such as "Dear Bob," in the Account No. field. Then add this field to the sales receipt template as per the instructions below.

Previous to using the Account No. field, I used the Alt. Contact field for this purpose, but it is no longer available in recent versions of QuickBooks. I


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tried creating a custom field in the customer record to use for the salutation, but QuickBooks appears unable to pull through the data in a custom field to a sales receipt form (even though the template editor lets me add it). I'll keep you posted if I find any other ways to solve this problem!

Next you want to create a sales receipt template so it prints like a letter. Follow these steps so your template in the Layout Designer window in QuickBooks looks similar to the screen shot at the end of these instructions:

a. Go to the **Lists** drop down menu and select **Templates**.

b. Click the **Templates** menu in the lower left corner; select **New**.

c. Click the radio button for **Sales Receipt** and click **OK**.

d. Click **Manage Templates** at the top of the Basic Customization window.

e. Next to *Template Name* type **Donor Thank You Letter**; click **OK**.

*f.* Click **Additional Customization…** at the bottom of the *Basic Customization* window.

g. Edit the header fields as per the table and screenshot below:

| Header Field | Screen | Print | Title |
|---|---|---|---|
| Default Title | ✓ | ✓ | Thank you for your donation |
| Date | ✓ | ✓ | Date |
| Sale Number | ✓ | ✓ | Gift Number |
| Sold To | ✓ | ✓ | Sold To |
| Check Number | ✓ | ✓ | Check Number |
| Payment Method | ✓ | ✓ | Payment Method |


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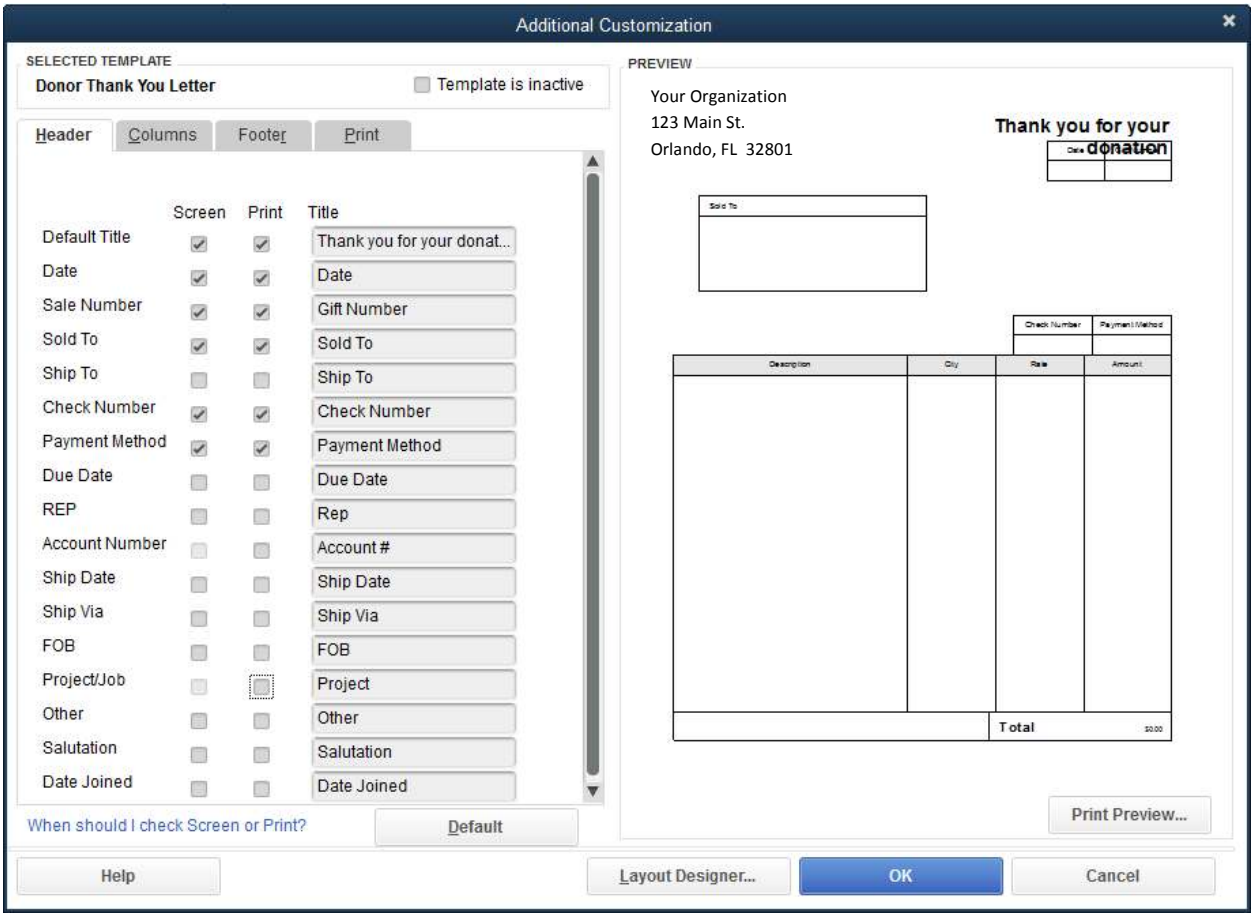



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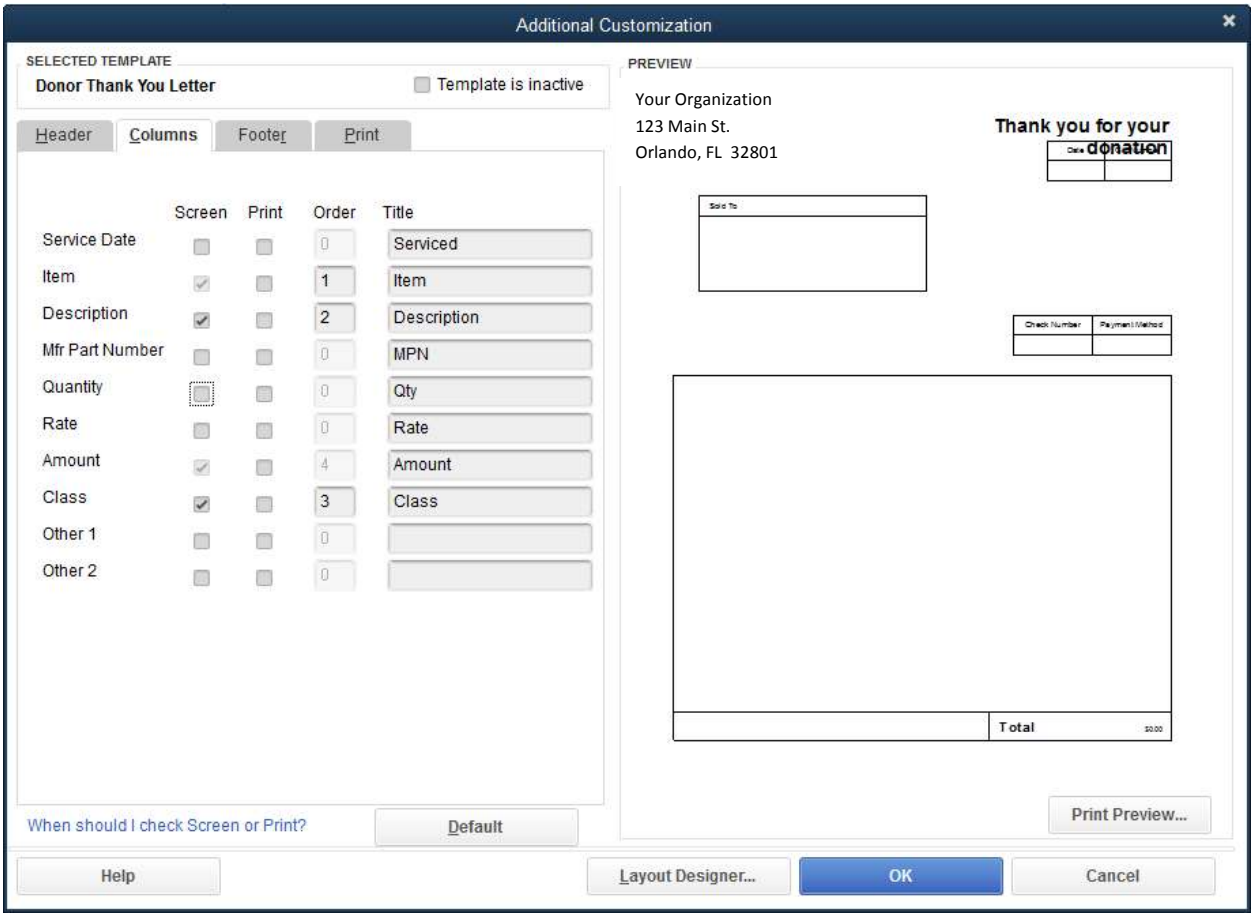
h. Click the **Columns** tab and set up the columns to look like the screenshot below:




i. Click **OK** to return to the *Basic Customization* window.

*j.* Click **Layout Designer…**

k. Click on the textbox in the top left corner that holds the organization's name.

   i. Click the **Properties** button on the top left.

   ii. In the *Justification* box in the *Vertical* section, click the **Bottom** radio button to move the name down closer to the address, then click **OK**.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l. Click the data field below the *Sold To* label field.

   i. Click the **Properties** button and then click the **Border** tab. Click to remove the check mark by each of the four borders (Top, Bottom, Left and Right).

   ii. Click the **Text** tab, then **Font...** and make the Size **12** point and click the **OK** button next to the font size.

   iii. Click **OK** again to save and close the Properties window.

m. Click the label *Sold To* and then click the **Remove** button or press the **Delete** key

n. Click the *Total* label field (you may need to drag the scroll bar down to see the bottom of the form) and hold down the left mouse button to drag it near the bottom left corner of the form (right above the box that says "This is sample text.").

   i. Line up the *Total* label field with the left border.

   ii. Click **Properties** and change the label from Total to **Donation Amount.**

   iii. Click **Font...**, then make the Font Style **Regular**, and point size **12**. Click **OK** to the Font changes and click **OK** again to close the *Properties* window.

   iv. Click the **Border** tab. Click to remove the check mark by each of the four borders.

   v. Adjust the width of the box so it's not wider than necessary by clicking and dragging the right side of the box to the left.


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vi. Click the *Total* data field (the box with $123.45 in it) and drag it to the right of the *Donation Amount* label. Click **Properties, Font...** and make the font size 12 point. Click **OK** to the font change, then **OK** again.

o. Click the *Check Number* label field and drag it near the bottom left corner of the form corner just above the *Donation Amount* field. Line it up on the left side of the box with the left border. Click the *Check Number* data field and drag it to the right of the label field.

p. Click the *Payment Method* label field and drag it near the bottom left corner just above the *Check Number* field. Line it up on the left side of the box with the left border. Click the *Payment Method* data field and drag it to the right of the label field.

q. For the *Total*, *Check Number* and *Payment Method* label and data fields, make sure the font size is 12 point (**Properties, Font**). Remove the borders (**Properties, Border**). Play with the box sizes and alignment so the grouping looks nice.

r. Click the *"This is sample text"* field then click **Remove**.

s. To add the letter saluation, click *Add,* then *Data Field*, then click to select **Account #**. Click **OK**.

   i. Click away from the new field, then click and drag the data field only (it should say Sample) to the top left corner below the inside address box (where you see "This is sample text").

   ii. Line it up with the left border.


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iii. While you have this data field selected, click **Properties** and on the *Text* tab under *Horizontal* click **Left**. Click **Font**, then **12** pt., then **OK**. Click the **Border** tab and uncheck all four borders. Click **OK**.

iv. Click on the *Account #* label and click the **Remove** button.

t. Click **Add**, then **Text Box**.

i. Click the **Left** radio button to justify left.

ii. Enter the text as shown below. Edit to include your actual organization name and customize the body of the letter to read as you wish. See IRS Publication 1771 for more guidance on proper wording of your acknowledgement.

*Thank you for your generous contribution to (Name of Your Org).*

*(Name of Your Org) is a nonprofit organization under Section 501(c)(3) of the Internal Revenue Code. Your contribution may be deductible if you itemize your deductions on your tax return. Please consult with your tax advisor. No goods or services were provided to you in consideration of your gift. Please retain this letter with your tax records. Details of your gift are listed below. Again, thank you for your donation.*

*Warm regards,*
*Name of person signing letter*
*Title*

*Legal wording as may be required by your state*


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iii. Click **Font** and make the size **12** point. Click **OK** to the font change.

iv. Click the **Border** tab and uncheck all four borders; click **OK**.

v. Drag the corner of the text box to make an area for the body of the letter.

2. Click on the text box at the top right that says "Thank you for your donation."

   a. Click **Properties** and on the *Text* tab click **Left**. Click **OK**.

   b. Drag to widen the field so the phrase fits on the page.

3. Click **OK** at the bottom of the *Layout Designer* window and **OK** again to save.

4. Try creating a donation receipt using your new template or open an existing donation receipt and select this template. Remember you need to enter a salutation in the *Account No.* field of the donor record. From the **Print** icon just above the donation receipt window, click the drop down arrow and select **Preview**. You will see what your new thank you letter receipt looks like. You may need to tweak a few things to get the appearance just right.

5. Note you can also add your logo in the *Layout Designer* window using the **Add** button, then select **Image**. The blue shaded boxes are meant to work with window envelopes, so keep that in mind when you are moving things around. You can move around the elements at the top of the letter as you wish to accommodate your logo or other text.


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6. Have fun! And please let us know how this template works out for you. Email us (Carol & Carrie) any time at info@careaccountingservices.com.


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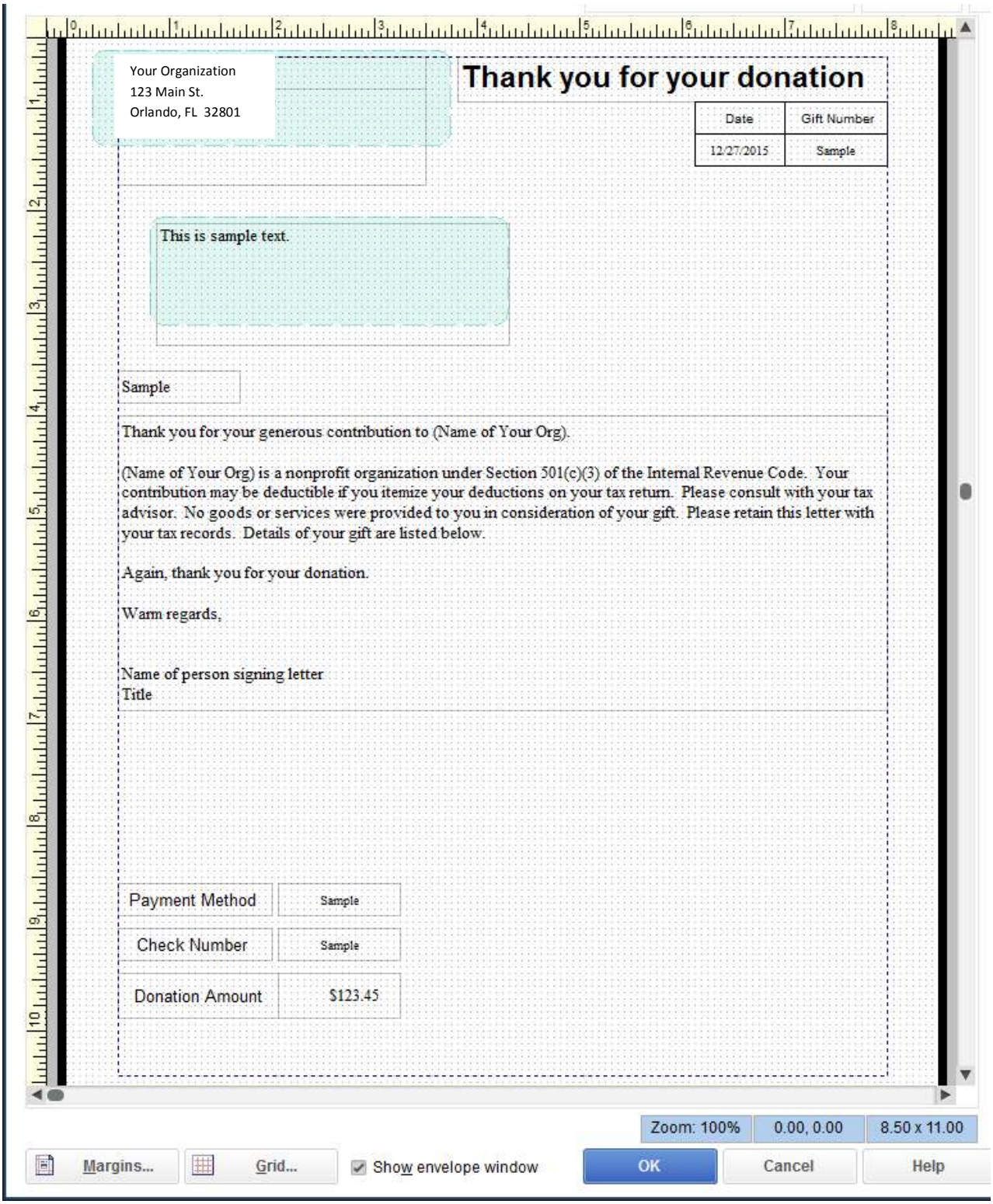



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