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NPSP: Acknowledge Donations by Email

The Nonprofit Success Pack provides different ways to email acknowledgment letters to donors. You can send an acknowledgment email from a specific Opportunity record, or you can send multiple email acknowledgments simultaneously from the Opportunities tab.

This article includes these topics:

- Setup - Before You Begin
- List of Relevant Salesforce Objects
- Email an Acknowledgment for a Single Opportunity Record
- Email Acknowledgments for Multiple Opportunity Records

Check out the video!

■◀ Nonprofit Success Pack How-To Series: Donation Acknowledgements (http://www.youtube.com/watch?v=QD6_kF12G5A&list=PLU8xqF8ZASbXWAHIF0SB1P9_3G4vvRMXI&index=3)

Setup - Before You Begin

If you downloaded a trial organization of NPSP at version 3.46 or later, then the Email Acknowledgments feature is ready to use and you can skip this step. (See [Which Version of Nonprofit Success Pack Am I Using?](/articles/Resource/Which-Version-of-NPSP-Am-I-Using/) (/articles/Resource/Which-Version-of-NPSP-Am-I-Using) for more information on locating your precise version.)

If you upgraded to NPSP from a previous version, or signed up for your NPSP trial before version 3.46, then you'll need to complete a few preliminary steps before you can use this feature.

Add new Opportunity Acknowledgment Status picklist values

- In Setup, under **Opportunities | Fields**, click on the label for the **Acknowledgment Status** field.
- In the Picklist Values section, click **New**.
- Enter the new values **Email Acknowledgment Now** and **Email Acknowledgment Not Sent**, and enable them for all record types that will use acknowledgments.

- Click **Save**.

Add the Acknowledgment Status and Acknowledgment Date fields to Opportunity page layouts

- Make sure that you've added the Opportunity fields named **Acknowledgment Status** and **Acknowledgment Date** to the page layouts used for Opportunities that will use acknowledgments.
- Also, make sure that you've made these fields accessible. From Setup, enter **Security Controls** in the Quick Find box, then select **Field Accessibility**. Select Opportunity. Click View by Fields. Select Acknowledgement Date. Click each of the Hidden links and check the Visible check box. You will need to do this for each profile and record type that these fields need to be available for.

Update the Logo used in the NPSP Sample Letterhead

- From Setup, enter **Letterheads** in the Quick Find box, then select **Letterheads** under the Communication Templates menu.
- Click on the label for **NPSP Sample Letterhead**.
- Click the **Edit Letterhead** button.
- In the header section of the letterhead, you can click **Remove Logo** to remove the NPSP logo from the section.
- Click **Select Logo** to choose a new image to display in the header section. This image file must reside in your Documents folder in Salesforce. For more information see Uploading and Replacing Documents (https://help.salesforce.com/HTViewHelpDoc?id=docs_upload.htm&language=en_US) in Salesforce Help & Training.

Edit the NPSP Opportunity Acknowledgment Email Template

- From Setup, enter **Email Templates** in the Quick Find box, then select **Email Templates** under the Communication Templates menu.
- Choose **NPSP Email Templates** from the dropdown menu.
- Click on the label for NPSP Opportunity Acknowledgment to view the HTML and Text versions of the template.
- Edit the HTML and Text versions to meet your organization's needs.

NOTE: *You can reference any field on the Opportunity, and any field from the Account. Unfortunately, you can't reference fields from other related objects. If you need to access a field on a lookup, such as Primary Contact, you will need to first create a formula field on the Opportunity, and then refer to the formula field in the email template. For more information see Building Formulas (https://help.salesforce.com/apex/HTViewHelpDoc?id=customize_formulas.htm&language=en) in Salesforce Help & Training.*

Activate the Opportunity Email Acknowledgment Workflow Rule

- From Setup, enter **Workflow Rules** in the Quick Find box, then select **Workflow Rules** under the Workflow & Approvals menu.

- Click on the label for **Opportunity Email Acknowledgment** to view the rule's criteria.
- If you need to change the rule criteria, you'll need to clone the workflow and then edit it.
- If you want to edit the From Email Address, you'll need to edit the Email Alert attached to the workflow.
- Once you are ready to use the rule, click **Activate**.

Add the Email Acknowledgments button to the Opportunity List View

- From Setup, enter **Opportunities** in the Quick Find box, then select **Search Layouts** under the Opportunities menu.
- Click **Edit** on the Opportunities List View.
- Move **Email Acknowledgments** to the Selected Buttons listbox and click **Save**.

Add the Email Acknowledgment button to Opportunity Page Layouts

- From Setup, enter Opportunities in the Quick Find box, then select Page Layouts under the Opportunities menu.
- For each page layout you want to use Acknowledgments with, click **Edit**.
- In the top section of the layout editor, click **Buttons**.
- Drag & drop the **Email Acknowledgment** button from the top section into the **Custom Buttons** area to the right of the **Standard Buttons**.
- Click **Save**.

List of Relevant Salesforce Objects

The NPSP Email Acknowledgments feature makes use of multiple Salesforce objects that you may want to customize for your organization. There are several steps for enabling these objects, as you learned in the previous section.

Here's a complete list of the specific objects for reference:

- Opportunity Acknowledgment Status picklist field values - Email Acknowledgment Now, Email Acknowledgment Not Sent
- Letterhead - NPSP Sample Letterhead
- Image file in NPSP Documents folder - Sample Letterhead Logo
- Email Template - NPSP Opportunity Acknowledgment
- Workflow Rule - Opportunity Email Acknowledgment
- Email Alert - Opportunity Email Acknowledgment
- Field Update - Opportunity Acknowledgment Date Update
- Field Update - Opportunity Acknowledgment Status Update

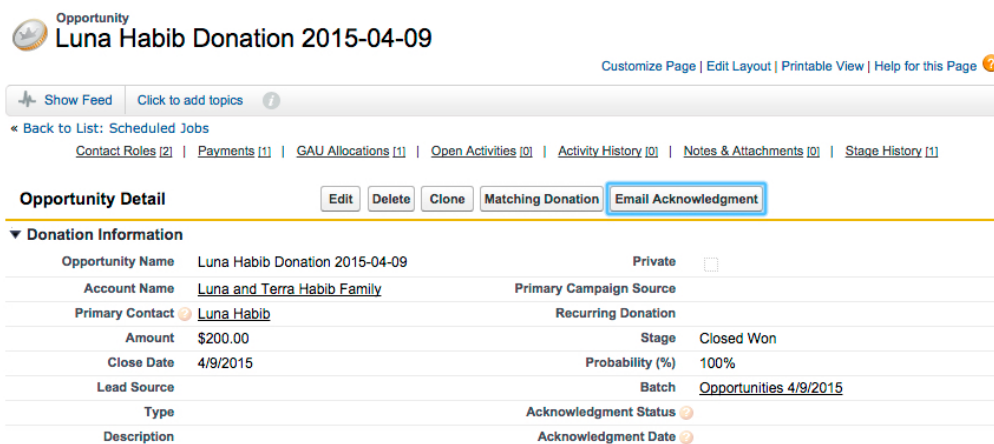
- Button - Opportunity - Email Acknowledgment
- Button - Opportunity - Email Acknowledgments

Once you've finished the initial setup, you won't need to concern yourself with most of this information, unless you later decide to customize how acknowledgments work in your organization.

Email an Acknowledgment for a Single Opportunity Record

The Nonprofit Success Pack makes it easy for you to email an acknowledgment or thank-you for a single Opportunity (in most cases, a donation).

To start, go to the Opportunity's detail page, and make sure the Primary Contact lookup field lists the appropriate contact. Then simply click on the **Email Acknowledgment** button.



Opportunity
Luna Habib Donation 2015-04-09

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed | Click to add topics

Back to List: Scheduled Jobs

Contact Roles [2] | Payments [1] | GAU Allocations [1] | Open Activities [0] | Activity History [0] | Notes & Attachments [0] | Stage History [1]

Opportunity Detail

Edit | Delete | Clone | Matching Donation | **Email Acknowledgment**

▼ Donation Information

Opportunity Name	Luna Habib Donation 2015-04-09	Private	<input type="checkbox"/>
Account Name	Luna and Terra Habib Family	Primary Campaign Source	
Primary Contact	Luna Habib	Recurring Donation	
Amount	\$200.00	Stage	Closed Won
Close Date	4/9/2015	Probability (%)	100%
Lead Source		Batch	Opportunities 4/9/2015
Type		Acknowledgment Status	
Description		Acknowledgment Date	

Clicking the button will:

- Update the selected Opportunity's Acknowledgment Status field to **Email Acknowledgment Now**.
- Trigger the workflow rule that will send the email. The workflow rule also updates the Acknowledgment Status and Acknowledgment Date fields for the Opportunity.

Salesforce assigns an **Acknowledged** Acknowledgment Status to successful acknowledgments, and sets the Acknowledgment Date to the current date. Salesforce assigns an **Email Acknowledgment Not Sent** Acknowledgment Status to those records whose acknowledgments failed.

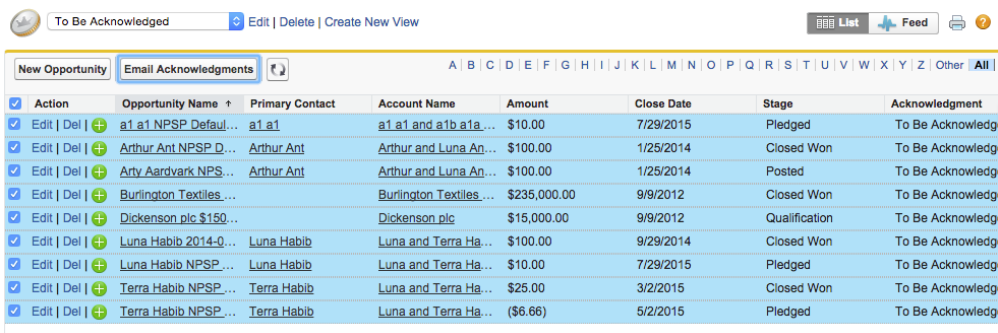
Email Acknowledgments for Multiple Opportunity Records

The Nonprofit Success Pack also supports sending acknowledgment emails for multiple Opportunity records at once.

First click on the Opportunities tab, and select the **To Be Acknowledged** list view. Salesforce displays all Opportunities whose Acknowledgment Status is **To Be Acknowledged**.

From the list view, you can then select all Opportunities using the checkbox on the header, or you can select specific Opportunities.

Lastly, click the **Email Acknowledgments** button.

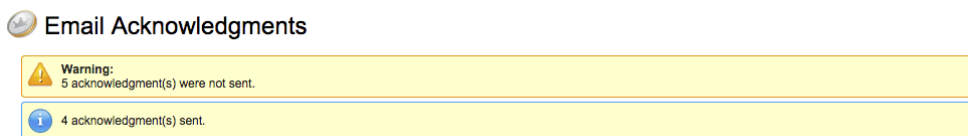


Action	Opportunity Name	Primary Contact	Account Name	Amount	Close Date	Stage	Acknowledgment
<input checked="" type="checkbox"/> Edit Del	a1 a1 NPSP Default...	a1 a1	a1 a1 and a1b a1a...	\$10.00	7/29/2015	Pledged	To Be Acknowledged
<input checked="" type="checkbox"/> Edit Del	Arthur Ant NPSP D...	Arthur Ant	Arthur and Luna An...	\$100.00	1/25/2014	Closed Won	To Be Acknowledged
<input checked="" type="checkbox"/> Edit Del	Arty Aardvark NPS...	Arthur Ant	Arthur and Luna An...	\$100.00	1/25/2014	Posted	To Be Acknowledged
<input checked="" type="checkbox"/> Edit Del	Burlington Textiles...		Burlington Textiles...	\$235,000.00	9/9/2012	Closed Won	To Be Acknowledged
<input checked="" type="checkbox"/> Edit Del	Dickenson plc \$150...		Dickenson plc	\$15,000.00	9/9/2012	Qualification	To Be Acknowledged
<input checked="" type="checkbox"/> Edit Del	Luna Habib 2014-0...	Luna Habib	Luna and Terra Ha...	\$100.00	9/29/2014	Closed Won	To Be Acknowledged
<input checked="" type="checkbox"/> Edit Del	Luna Habib NPSP...	Luna Habib	Luna and Terra Ha...	\$10.00	7/29/2015	Pledged	To Be Acknowledged
<input checked="" type="checkbox"/> Edit Del	Terra Habib NPSP...	Terra Habib	Luna and Terra Ha...	\$25.00	3/2/2015	Closed Won	To Be Acknowledged
<input checked="" type="checkbox"/> Edit Del	Terra Habib NPSP...	Terra Habib	Luna and Terra Ha...	(\$6.66)	5/2/2015	Pledged	To Be Acknowledged

Clicking the button will:

- Update the selected Opportunities' Acknowledgment Status field to **Email Acknowledgment Now**.
- Trigger the workflow rule that will send the email. The workflow rule also updates the Acknowledgment Status and Acknowledgment Date fields for each Opportunity.

Clicking the button will also display the following page so that you know which acknowledgments were successfully sent, and which were not.



Email Acknowledgments

Warning:
5 acknowledgment(s) were not sent.

i 4 acknowledgment(s) sent.

[Return to Opportunity](#)

The following records were not acknowledged. Acknowledgements can fail if there is no workflow rule (Acknowledgement Status EQUALS 'Send Acknowledgement') activated to send the acknowledgement, or if the records did not meet additional criteria to trigger the workflow rule. For example, if Primary Contact is not set, or if the Primary Contact's email field is empty or invalid.

- Dickenson plc \$15000.00 2012-09-09
- Burlington Textiles Corp of America \$235000.00 2012-09-09
- a1 a1 NPSP Default 2015-07-29
- Arty Aardvark NPSP Default 2014-01-25
- Arthur Ant NPSP Default 2014-01-25

[Return to Opportunity](#)

Salesforce assigns an **Acknowledged** Acknowledgment Status to successful acknowledgments, and sets the Acknowledgment Date to the current date. Salesforce assigns an **Email Acknowledgment Not Sent** Acknowledgment Status to those records whose acknowledgments failed.



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salesforce.com

