



# Personalized Donation Acknowledgement Letters

## User Brief

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# CONTENTS

<b>Introduction .....</b>	<b>1</b>
Permissions and Requirements .....	1
About Donation Acknowledgement Letters .....	1
Overview .....	1
<b>Create a Letter Template in Microsoft Word .....</b>	<b>2</b>
Preparation .....	2
Overview .....	2
Important: Do Not Use Headers and Footers .....	2
Add an Automatically Updated Date .....	2
Create Merge Fields .....	3
<b>Upload the Template .....</b>	<b>5</b>
<b>Assign the Template to One or More Donations.....</b>	<b>6</b>
<b>Map Donation Data to the Document’s Merge Fields .....</b>	<b>7</b>
About Field Mapping.....	7
Before You Start .....	7
Getting Started.....	7
Set the File Type (PDF) and Display the Link on the Donor Receipt .....	7
Map the Data Fields.....	7
Mapping Common Fields .....	8
Mapping Duplicate Information.....	8
<b>Test Your Donation Acknowledgement Letter .....</b>	<b>9</b>
Troubleshooting.....	9
<b>Replacing a Template .....</b>	<b>10</b>

# Introduction

## Permissions and Requirements

Donation acknowledgement letters use Doubleknot's Template Management feature and the associated Template Administrator permission. Please contact the primary Doubleknot administrator for your organization

If you are the primary Doubleknot administrator, the requirements to use Template Management are the following:

- If **Template Management** is not visible in the Feature List, let us know at [support@doubleknot.com](mailto:support@doubleknot.com).
- After Template Management is enabled for your organization, anyone who will be using the feature must have the Template Administrator permission enabled for their account.

## About Donation Acknowledgement Letters

In Doubleknot, you can automatically generate personalized acknowledgement letters for donations. The personalized letters are created as a PDF attached to the donor's receipt. The link to the PDF is highlighted in yellow to increase visibility.

*When the donor clicks the link highlighted in yellow, their personalized donation acknowledgement letter is downloaded.*

**San Jose Zoo & Park**  
3400 W. Avenue  
San Jose, CA 95070  
US

**Donation**

Donation By: [Redacted]  
Number: 2867221  
Donation Date: 9/9/2019

Donation for: [Redacted]

Name	Description	Amount
	Donation	\$100.00
	Sub Total:	\$100.00
	Previous Payments and Adjustments: (\$100.00)	
	Total:	\$0.00
	Balance:	\$0.00

Additional Documentation (click on link to download):  
[Click here to download acknowledgement of your donation](#)

Please direct all inquiries to:  
[Redacted]

## Overview

The steps for creating automatic acknowledgement letters in Doubleknot are:

- Create a new donation or identify an existing donation that will use the acknowledgement letter
- In Word, create the template for your custom document. Use mail merge fields as placeholders for personalized information.
- Upload the template in Doubleknot.
- Assign the template to one or more donation types. You must make sure that each donation collects the data that you want to include in the acknowledgement letter.
- Map the data collected during the donation (such as first name and last name) or in forms assigned to the donation to the correct fields in the template.
- Test to confirm that the document is created correctly with the personalized information.

# Create a Letter Template in Microsoft Word

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Full documentation of Microsoft Word's powerful design and mail merge features are beyond the scope of this document. This section contains general instructions to use Word's mail merge feature to create templates for automatic donation acknowledgment letters.

**NOTE:** Different versions of Word may use different ways of setting up mail merge. Be sure to follow the instructions for your version of Word

## Preparation

Before you create the template, spend some time thinking about its **contents** and **design**.

- What information needs to be included?
- Are you sure that the information you want to include is being collected by the donation?
- What should the final document look like?

## Overview

To create the Word document, follow these steps:

1. Create a new Word document.
2. Write the acknowledgement letter
3. Add merge fields everywhere that personalized information should be placed.
4. Add graphics like a signature or a logo.
5. Save the document as a regular Word document with the .doc or the .docx extension.

## Important: Do Not Use Headers and Footers

**IMPORTANT:** Do not place images in the header or footer of the Word document. If you need to place text or images near the top or bottom, minimize the top and bottom margins and place the graphics at the top and/or bottom of the body:

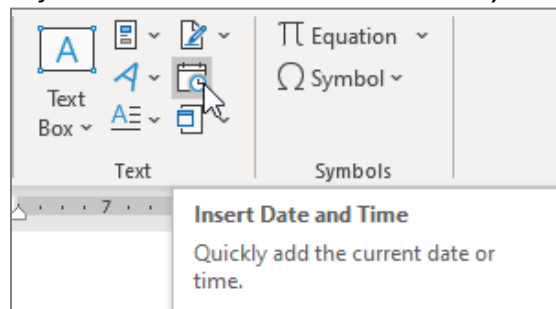
1. In the LAYOUT tab on the ribbon, click **Margins** and select **Custom Margins...** The PAGE SETUP dialog box is displayed.
2. Change the top and/or bottom margins to a small number (like 0.3 inches).
3. Click the LAYOUT tab.
4. Reduce the space from the edge for the header and/or to a smaller number (like 0.3 inches).
5. Click **OK**.

## Add an Automatically Updated Date

Word's INSERT DATE AND TIME feature can be used to put the date of the donation on the acknowledgement letter. To add a date field, put the cursor where you want the data to be displayed and follow these steps:

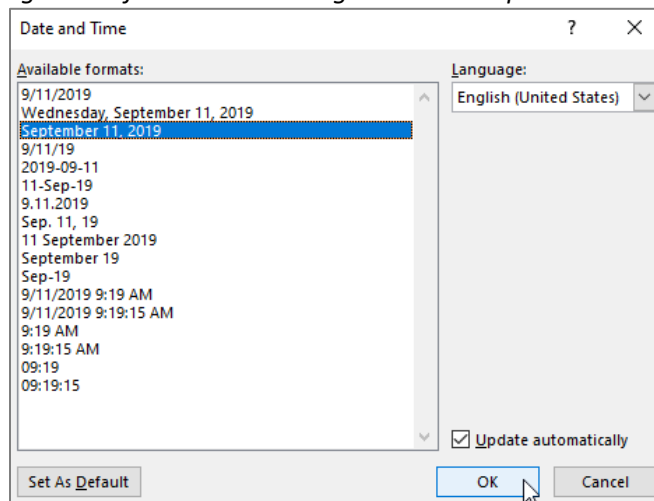
1. In the ribbon, click the **Insert** tab.

*The Insert Date and Time features adds the current date to every donation acknowledgement*



2. In the TEXT panel, click **Insert Date and Time**. The DATE AND TIME dialog box is displayed.
3. In the panel on the left, select the date format.
4. On the right, select **Update automatically**. This ensures that the current date will always be added to the letter.
5. Click **OK**. The date field will be added to the document.

## Choosing a date format and setting the date to update automatically



### Create Merge Fields

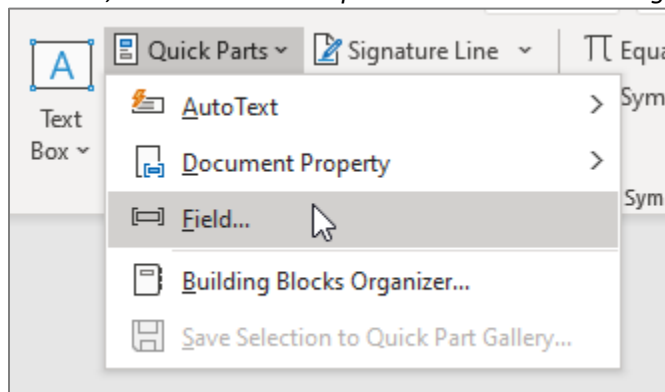
A merge field identifies a location where information will be inserted from the data source. For example, the merge field «FirstName» will be configured to insert the first name from records in the data source.

Because the data source is on the Doubleknot server and not in a local Microsoft Office file, you will create **custom merge fields**. They serve as placeholders for the data that will be extracted from the donation in Doubleknot.

The following is the general process for inserting custom merge fields in Microsoft Word. If your installation doesn't work this way, look up the instructions for your version of Word.

1. Click the mouse to place the cursor where you want to insert a merge field.
2. On the ribbon, click the **Insert** tab.
3. In the TEXT panel, click **Quick Parts** and select **Field...** The dialog box to insert a field will be displayed.

*In QUICK PARTS, select the **Field...** option to create a mail merge field*



4. In the PLEASE CHOOSE A FIELD column:
  - In the CATEGORIES menu, click **Mail Merge**.
  - In the FIELD NAMES panel, click **MergeField**.
5. In the FIELD PROPERTIES column:
  - In the FIELD NAME field, enter a short meaningful name for the merge field.

**IMPORTANT:** Do not use spaces in the field name. For example, if a field will contain the donor's first name, name the field FirstName.

- In the FORMAT panel, choose a format if desired. For example, to ensure that a name is properly capitalized even if the registration owner entered it in lower case, select **First capital**.
6. Click **OK**. The field will be added at the location of the cursor. You can identify merge fields in the Word document by the special double brackets on each side. Do not make any changes to the brackets.

*Creating a custom merge field called FirstName where the first letter will always be capitalized*

The screenshot shows the 'Field' dialog box in Microsoft Word. It is divided into three main sections: 'Please choose a field', 'Field properties', and 'Field options'.  
1. 'Please choose a field': A dropdown menu shows 'Mail Merge' selected. Below it, a list of field names includes 'MergeField', which is highlighted.  
2. 'Field properties': The 'Field name' text box contains 'FirstName'. The 'Format' list includes '(none)', 'Uppercase', 'Lowercase', 'First capital' (which is selected), and 'Title case'.  
3. 'Field options': There are four checkboxes: 'Text to be inserted before:', 'Text to be inserted after:', 'Mapped field', and 'Vertical formatting', all of which are unchecked. The 'Preserve formatting during updates' checkbox is checked.  
At the bottom, there is a 'Description' field with the text 'Insert a mail merge field', and 'OK' and 'Cancel' buttons.

7. Continue placing merge fields in your document.
8. Save the Word document with the standard .doc or .docx file extension.

*In the following sample acknowledgement letter, the highlighted fields are merge fields. The date is a field set to update automatically. The logo and signature are small images inserted into the Word document.*

The screenshot shows a sample acknowledgement letter template. At the top center is the logo for 'Mountain Region History Museum'. Below the logo is the date 'September 12, 2019'. The address fields are highlighted in yellow: «firstname» «lastname», «address», «city», «state», «postalcode». The salutation is 'Dear «firstname»:'. The main body of the letter contains several paragraphs of text, with the amount and date fields highlighted in yellow: 'On behalf of our Board of Directors, please accept our sincere appreciation for your generous gift of \$«amount» (dated «giftdate»).' and 'Because of supporters like you, we can expand our programs and services to ensure that the rich history and traditions of our beautiful region are preserved and shared.' and 'Again, we appreciate your support and look forward to seeing you again soon! Please check our online calendar for upcoming events.' The signature block includes 'Best regards,' followed by a handwritten signature 'Jane Doe' and the typed name 'Jane Doe' and title 'Executive Director'. At the bottom, there is a small footer with tax information: 'As a 501c3 charity, this letter serves as official acknowledgement of your gift. No goods or services were received with regard to this contribution; therefore, the full amount of your gift is tax deductible. Our Tax Identification Number is 11-1111111. Thank you!'

# Upload the Template

To upload your template in Doubleknot, follow these steps:

1. In the ADMINISTER panel, click **Template Management**. The TEMPLATE LIBRARY page is displayed.
2. At the right, make sure **New Template** is selected.
3. Click **OK**. The EDIT TEMPLATE page is displayed.
4. In the DESCRIPTION field, type a name for the template you're uploading.

**IMPORTANT:** The name you enter in the DESCRIPTION field will be displayed on the receipt. If you want the yellow-highlighted text on the receipt to say **Thank you! Click here for your donation acknowledgement letter**, you must enter that text in the DESCRIPTION field.

5. If you want to make the template available to different groups in your organization, select the desired setting from the SHARE TEMPLATE menu:
  - **This Organization Only**
  - **This Organization and Affiliate Organizations**
  - **This Organization, Affiliates and Immediate Child Organizations**
  - **This Organization, Affiliates and All Child Organizations**
6. Depending on your browser, click **Choose Files** or **Browse**.
7. Locate and select the Word template you created.
8. Click **Add**. The template will be uploaded to Doubleknot and the TEMPLATE LIBRARY will be displayed.

*Naming a template for a donation acknowledgement letter*

**ADD TEMPLATE**

Description:

Template Type:

Share Template:

Select File:  AutoDonorA...ement.docx

- **AutoDonorAcknowledgement.docx** (application/vnd.openxmlformats-officedocument.wordprocessingml.document) - 45245 bytes, last modified: Wed Sep 11 2019



# Assign the Template to One or More Donations

After the template is uploaded, the next step is to assign the template to an event. To do so, follow these steps at the TEMPLATE LIBRARY page:

1. In the TEMPLATE LIST on the left, select the template you just uploaded.
2. In the FUNCTIONS panel on the right, select **Assign Templates to Items**.
3. Click **OK**. The MANAGE ACTIVITY ASSIGNMENTS page is displayed.
4. In the SELECT A TEMPLATE menu, make sure that the template you want to work with is selected.
5. In the AVAILABLE ACTIVITIES panel, locate and select the donation type that the template should be used with.
6. Click **Add**. The ASSIGNED ACTIVITIES panel will show that the template is assigned to the event.
7. If you want to use the same template for additional donations, repeat steps 4-6.
8. To leave this page, click **Done**.

## Selecting a donation type for the template

The screenshot shows the 'MANAGE ACTIVITY ASSIGNMENTS' interface. At the top, there is a 'Select a Template:' dropdown menu with the selected option 'Click here to download acknowledgement of your donation'. Below this, there are two main panels: 'Available Activities' on the left and 'Assigned Activities' on the right. The 'Available Activities' panel contains a list of activities, with 'Sep 1 2019 3:00AM Recurring Donation (Donation)' highlighted in blue. Below this list are the sub-headers: 'All Calendar, Class, Dues and Fund Raising Events for San Jose Zoo & Park', 'All Memberships for San Jose Zoo & Park', 'All Facilities for San Jose Zoo & Park', and 'All Programs for San Jose Zoo & Park'. Between the two panels are two buttons: 'Add →' and '← Remove'. A mouse cursor is pointing at the 'Add' button.

## The template is successfully assigned to the donation type

The screenshot shows the 'MANAGE ACTIVITY ASSIGNMENTS' interface after the template has been assigned. The 'Select a Template:' dropdown menu remains the same. The 'Available Activities' panel now contains a list of activities, with 'Sep 1 2019 3:00AM Recurring Donation (Donation)' moved to the 'Assigned Activities' panel. The 'Assigned Activities' panel now contains the text 'Sep 1 2019 3:00AM Recurring Donation (Donation)'. The 'Available Activities' panel now contains a list of activities, with 'Jan 1 2010 3:00AM Adopt African Lion (Dues)' at the top. Below this list are the sub-headers: 'All Calendar, Class, Dues and Fund Raising Events for San Jose Zoo & Park', 'All Memberships for San Jose Zoo & Park', 'All Facilities for San Jose Zoo & Park', and 'All Programs for San Jose Zoo & Park'. Between the two panels are two buttons: 'Add →' and '← Remove'.

# Map Donation Data to the Document's Merge Fields

In this section, we're going to identify the information from Doubleknot that goes into each merge field in the template.

## About Field Mapping

All data fields associated with the donation type can be mapped to the templates. These fields include:

- All the registrant attributes (including custom attributes) that are used in the donation
- If a form is associated with the donation, all data fields in the form are available for mapping

## Before You Start

Before you begin mapping, we recommend that you:

- Make sure that the donation type is configured to collect all of the personalized information you want to include in the letter.
- In the donation and any assigned forms, make note of the Doubleknot fields you want to use in the letter.

## Getting Started

To get started, follow these steps:

1. At the TEMPLATE LIBRARY, select the template you want to map.
2. At the right, select **Map Template Fields**.
3. Click **OK**. The MAP FIELDS page is displayed.

## Set the File Type (PDF) and Display the Link on the Donor Receipt

To set parameters for the merge, follow these steps:

1. In REPORT CONTENT FORMAT, select **Portable Document Format (PDF)**. This option is recommended for acknowledgement letters because the PDF form maintains all of your formatting and can be opened on most smartphones, tablets and computers.
2. In REPORT ACCESS OPTIONS, select **Display Link to Download Report on Receipt**. Donors can access the personalized letter by clicking a link on the receipt.

**IMPORTANT:** You must select DISPLAY LINK TO DOWNLOAD REPORT ON RECEIPT. If you don't, the donor cannot retrieve the acknowledgement letter.

## Map the Data Fields

When you map the data fields, you're telling Doubleknot which information from the donation goes into each of the merge fields you created. Doubleknot may automatically map some of the fields. If the automatic mapping is incorrect, you can change the mapping.

*The MAP FIELDS page. Doubleknot automatically mapped the common fields for name and address.*

**MAP FIELDS**

Repeating Bookmark  
Bookmarks are used to define repeat blocks. A repeat block is a fragment in the template document that contains merge fields and that will be repeated for each row in a data source. No repeating bookmarks ▾

Next Fields  
Sets whether NEXT fields should be enabled in the template document. If NEXT fields are enabled, the next row of data is used when merge field is repeated in the template file.  Enable next fields

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Report Content Format  
 Portable Document Format (PDF)  
 Microsoft Word  
 Hypertext Markup language (HTML)

Report Access Options  
 Only Available in Event Reports  
 Display Link to Download Report on Receipt

Template Field Name	Data Source Field Name	Sort On This Column	Required To Merge	Display Format
firstname	First Name ▾	<input checked="" type="radio"/>	<input type="radio"/>	Text ▾
lastname	Last Name ▾	<input type="radio"/>	<input type="radio"/>	Text ▾
address	Address ▾	<input type="radio"/>	<input type="radio"/>	Text ▾
city	City ▾	<input type="radio"/>	<input type="radio"/>	Text ▾
state	State ▾	<input type="radio"/>	<input type="radio"/>	Text ▾
postalcode	Postal Code ▾	<input type="radio"/>	<input type="radio"/>	Text ▾
firstname2	Please Select ▾	<input type="radio"/>	<input type="radio"/>	Text ▾
amount	Please Select ▾	<input type="radio"/>	<input type="radio"/>	Text ▾
giftdate	Please Select ▾	<input type="radio"/>	<input type="radio"/>	Text ▾

To map or change the mapping for fields, follow these steps for each row:

1. In the DATA SOURCE FIELD NAME menu, select the Doubleknot information that you want to place in that field. For example, for the template field **FirstName**, you would typically select **First Name** for the DATA SOURCE FIELD NAME. (Please read the se
2. For DISPLAY FORMAT, do not change the default selection of TEXT.
3. When you've mapped all the fields, click **Save**.

*All template fields are mapped to a data field used by the donation type*

Template Field Name	Data Source Field Name
firstname	First Name ▼
lastname	Last Name ▼
address	Address ▼
city	City ▼
state	State ▼
postalcode	Postal Code ▼
firstname2	Registered By First Name ▼
amount	Total Amount Paid ▼
giftdate	Start Date ▼

### Mapping Common Fields

The data source fields available for mapping will vary depending on how your organization configured the donation. If your organization hasn't changed the defaults, you can

- To enter the amount of the gift, select **Total Amount Paid**.
- To enter the date of the donation, select **Start Date**.

### Mapping Duplicate Information

Each Doubleknot data source field can only be assigned to one field in the template. So, if you map the Doubleknot data field FIRST NAME to the first name field in the address section of your template, you can't use the same Doubleknot field for the first name in the greeting.

By default, Doubleknot can capture identical information in multiple fields. For example, the fields FIRST NAME and field REGISTERED BY FIRST NAME are the same in a donation, so you can map the second template field for the donor's first name to REGISTERED BY FIRST NAME.

# Test Your Donation Acknowledgement Letter

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If the donation type is new and contains no data, you'll need to complete a donation to test the acknowledgement letter. If you choose to "pay" for the donation with an offline method, your test donation will be easier to cancel.

When at least one completed donation exists, follow these steps to ensure that your acknowledgement letter is configured correctly:

1. On the management page for the donation, click **Manage Registrations**. The **MANAGE DONATIONS** page is displayed.
2. For any completed donation, click the three-dot menu at the right and select **View Payments**. The **PAYMENT DETAILS** page for the donation is displayed.
3. Click **Issue Receipt**. The receipt will be displayed. You may need to scroll down to see the donation acknowledgement link highlighted in yellow.
4. Click the link to download and view the acknowledgement letter.
5. In the dialog box that allows you to select a location for the downloaded file, check to make sure that the document it's downloading has the .pdf file extension. **If it's generating a Word document with the file extension \*.doc, cancel the download and follow the troubleshooting instructions below.**
6. Open the downloaded PDF.
  - If the letter opens but doesn't look the way you intended, follow the steps earlier in this document to modify, upload, assign and map fields for the template.
  - If the letter won't open and generates an error message about the file format, follow the troubleshooting instructions below.

**IMPORTANT:** If you created a test donation, remember to cancel and refund the donation so that test data is not included in reports.

## Troubleshooting

If clicking the link downloads a document that isn't a PDF, or if the PDF can't be opened, use these steps to troubleshoot the issue:

- Does your Word document have text, graphics or merge fields in the header and/or footer? If it does, remove them from the header and footer and place them in the main body of the letter. See [Create a Letter Template in Microsoft Word](#) for more information. Then, upload the new template, remap the fields and check if the issue is resolved.
- If your template generates a \*.doc file or a PDF that won't open, save a version of the template as a Word 97-2003 (\*.doc) document. Then, upload the new template in the \*.doc format.

If you continue to have problems generating acknowledgement letters, let us know at [Support@doubleknot.com](mailto:Support@doubleknot.com). Please include a copy of the Word template and let us know what name is used to identify the template in Doubleknot.

## Replacing a Template

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When you replace a template, all the donation types that use the template will automatically use the new template, so you can skip the step where you assign the template to donations. However, you should remap the merge fields and test the new template to ensure that it works correctly.

To replace a template, follow these steps:

1. Create the new Word template.
2. In the FEATURE LIST, click **Template Management**. The TEMPLATE LIBRARY is displayed.
3. In the column on the left, select the template you want to replace.
4. In the column on the right, select **Edit Template**.
5. Click **OK**. The EDIT TEMPLATE page will be displayed.
6. To change the text displayed on the receipt, update the information in the DESCRIPTION field.
7. To add the new template, click **Replace Template**.
8. Follow the steps to locate and select the new template.
9. Click **Update**. The new template will be uploaded.
10. Follow the steps in [Map Donation Data to the Document's Merge Fields](#).
11. Test the updated template.