Configuring your Tax Receipt Settings

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Donor Management System

To issue Tax Receipts through the DMS, you are required to enter your organization details to ensure the information required by the CRA is properly configured.

Please read the following article carefully, as the below settings are fundamental to ensuring any Tax Receipts issued by your DMS are CRA-compliant.

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🎥 Prefer to watch a **guided walk-through** on configuring your Tax Receipt Settings? Check out our **Tax Receipting Webinar**!

Configuring your Tax Receipt Settings

1. To configure your Tax Receipts Settings, visit your **Administrative Settings**.

2. Under System Settings, select *Receipt Settings*

3. On the next page, you will then have to fill out all the necessary information:

Organization Details

The unique information about your organization. Please fill out all the required fields in this section.

Organization Details

Organization Name *	Charitable Organization
	My Charitable Organization
Address Line 1 *	123 Street
	101 Anywhere Drive
Address Line 2 *	City, PR, O1O 1O1
	Toronto ON A1B 2C3
Telephone *	(555) 555-5555
	(555) 555-5555
Email *	donor@soaringspirits.ca
	info@my.org
Website *	Charitable.org
	www.my.org
Charitable Registration Number *	10000-000-RR0000
	10000-000-RR0000
Location Issued *	City/Town/Municipality
	Toronto

Organization Details

Location Issued: Enter the the *City, Town or Municipality* of where your receipts are issued or that of your charity's operational base. It ensures compliance with tax regulations by confirming the receipt's origin.

Receipt Configuration

The visual elements of your Tax Receipts and how they will be recorded in your DMS. Please fill out the following fields.

Receipt Configuration

Receipt Prefix	WELL

Receipt numbers are formed by appending the CanadaHelps DMS Contribution ID to this prefix. Receipt numbers must be unique within your organization. If you also issue tax receipts using another system, you can use the prefix to ensure uniqueness (e.g. enter 'WEB-' here so all receipts issued through CanadaHelps DMS are WEB-00000001, WEB-00000002, etc.)

Organization Logo   [Browse...]

File types allowed: .jpg .png

Organization Logo

Signature Image   [Browse...]

File types allowed: .jpg .png

Signature Image

Configure Canadian Tax Receipt

- **Prefix:** identify a prefix that will append to each Tax Receipt Number you issue through the DMS. This will help differentiate DMS issued Tax Receipt Numbers from CanadaHelps Tax Receipt Numbers. It currently defaults to "CRM".

- **Organization Logo:** attach your organization's logo to your Tax Receipts. *A small square preview of the image will display when chosen.*
- **Signature Image:** attach an image of the signature of your Tax Receipt Signatory. *A small square preview of the image will display when chosen.*

From Email and Archive Email

Choose how Tax Receipts will be delivered (donor-facing) and stored (internal record-keeping). Please fill out all the required fields in this section.

Email Message Settings

- **Email From / From Email:** the email address that is donor-facing, and will display when issuing Tax Receipts by Email and other email communications (i.e. Thanking your Donor and Bulk Emails). There is a configuration process that will be completed by your Onboarding Expert with you. If you did not share a From Email address during your kick off call, please share this with your Onboarding Expert via email.

  - **Note:** If your From Email is not fully configured, you will get a **Mailing Error** message when attempting to send emails or receipts. Please reach out directly to your *Onboarding Expert* if you encounter this error.

- **Archive Email:** for record-keeping purposes (and as required by the Canada Revenue Agency), this is an organizational email address to which copies of each tax receipt will be emailed every time a tax receipt is issued. You can modify this Archive Email address at any time.

4. After all necessary fields are added, select the *Submit* button at the bottom left corner of the screen.

Save Receipt Configuration

Update Organization DMS Information

5. Next, head back to your **Administrative Settings**.

6. Under *Communications*, select ***Organization Address and Contact Info***

Settings > Organization Info

7. Ensure your Organization information, including location, phone number, and mail contact email address are up to date, as these details can be used in your Tax Receipt PDF Thank You Note.

Learn more about updating your Organization Information here.

Note: After filling out and saving all fields, we recommend adding a fake offline Contribution in your DMS and generating a preview of a Tax Receipt for this Contribution so that you can check the graphics of your Tax Receipts.

If necessary, you can come back to this form to upload any new version(s) of your graphics.

What's Next?

Now that you've configured your basic tax receipt settings, learn how to update the default Tax Receipt PDF Thank

You Note, modify the Tax Receipt Email Messages, and add personalized Thank You acknowledgements in the DMS!