

Issuing Non-Charitable Receipts

Last Modified on 04/26/2023 4:46 pm EDT

Donor Management System

You can send Non-Charitable or Acknowledgement Receipts in the DMS by a combination of:

- [Excluding Contributions from Receipting](#),
- Using our [Thank-you tool](#) while selecting a dedicated [Template](#) with [Merge Fields](#) to send the Non-Charitable Receipts to Contacts, and
- Filtering these Contributions that have been excluded from Receipting for your reporting

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Before issuing non-charitable receipts

1. First, you will need to add a [Single](#) or [Multiple Contributions](#).
2. Then, [exclude these Offline Contributions from Receipting](#) (only one at a time at this moment).

Identifying non-charitable contributions

After following the first few steps above, you can easily filter by Contributions that have been excluded from Receipting.

3. Go to the **Contributions** tab.
4. Select **Advanced Search** on the top right.

Wellness Avenue | Dashboard | Contacts | **Contributions** | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

Search by contributor name or email **Advanced Search**

Actions 0 Selected Records Only All 1451 Records

<input type="checkbox"/>	Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
<input type="checkbox"/>	March 2nd, 2023 10:16 AM	A. L. Kostenko	\$88.00	General Fund		DMS Manual	EFT	Completed		-
<input type="checkbox"/>	March 2nd, 2023 10:13 AM	Lucas Froese	\$100.00	General Fund		DMS Manual	Cash	Completed	WELL00000923	✓
<input type="checkbox"/>	March 2nd, 2023 01:59 AM	Benjamin Franklin	\$1.23	Fitness	Bottle Drive	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed		-
<input type="checkbox"/>	March 1st, 2023 05:34 PM	Nicole Lam	\$200.00	General Fund		DMS Manual	Cheque	Completed	WELL00000922	✓

Select Advanced Search

5. Under **Source**, select **DMS Manual** or any other Source that is not *CanadaHelps* (donations coming from CanadaHelps.org cannot be received in the DMS).

Wellness Avenue | Dashboard | Contacts | **Contributions** | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

^ Edit Search Criteria

CONTRIBUTOR NAME OR EMAIL

CONTACT TAG(S)

CONTACT TYPE

DATE RECEIVED

CONTRIBUTION AMOUNTS From To

TRANSACTION ID

CAMPAIGN GROUPS

THANK YOU SENT

CONTRIBUTOR GROUP(S)

SEARCH IN TRASH (DELETED CONTACTS)

CONTRIBUTION STATUS

PAYMENT METHOD

INVOICE NUMBER

CAMPAIGN

CONTRIBUTION RECEIPTED

CURRENCY

FUND

GL ACCOUNT

SOURCE

PREFERRED COMMUNICATION METHOD

Under Source, select DMS Manual

6. Then, scroll down until you find the **Contributions Details** section. Under **EXCLUDE FROM TAX RECEIPTING**, select **Yes**.

Wellness Avenue

Dashboard Contacts **Contributions** Campaigns Opportunities Reports DMS Mail

Settings | Help DMSCADMSCA

^ Edit Search Criteria

CONTRIBUTOR NAME OR EMAIL

CONTACT TAG(S)

CONTACT TYPE

Any

DATE RECEIVED

Any

CONTRIBUTION AMOUNTS

From To

TRANSACTION ID

Transaction ID

CAMPAIGN GROUPS

THANK YOU SENT

Any

EXCLUDE INCLUDE BY PRIVACY OPTION(S)

Additional info

^ Contribution Details

EXCLUDE FROM TAX RECEIPTING Yes

FEES COVERED

Any

RECEIPT NUMBER

CONTRIBUTION NOTE

Dedication Information

Custom Question

Recurring Contributions

Search

Search

CONTRIBUTOR GROUP(S)

SEARCH IN TRASH (DELETED CONTACTS)

CONTRIBUTION STATUS

CURRENCY

Any

PAYMENT METHOD

Any

FUND

All Contributions

INVOICE NUMBER

Invoice Number

GL ACCOUNT

Any

CAMPAIGN

Any

SOURCE

DMS Manual

CONTRIBUTION RECEIPTED

Any

PREFERRED COMMUNICATION METHOD

Any

?

Scroll down to **Contribution Details** > **EXCLUDE FROM TAX RECEIPTING** > and select **Yes**

7. Once you're satisfied with your search criteria, select **Search** on either the top or bottom of the *Advanced Search* filters.

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help DMSCA DMSCA

^ Edit Search Criteria

CONTRIBUTOR NAME OR EMAIL

CONTACT TAG(S)

CONTACT TYPE

Any

DATE RECEIVED

Any

CONTRIBUTION AMOUNTS

From To

TRANSACTION ID

Transaction ID

CAMPAIGN GROUPS

THANK YOU SENT

Any

EXCLUDE INCLUDE BY PRIVACY OPTION(S)

Additional info

^ Contribution Details

EXCLUDE FROM TAX RECEIPTING

Yes

FEES COVERED

Any

RECEIPT NUMBER

CONTRIBUTION NOTE

Dedication Information

Custom Question

Recurring Contributions

Search

Search

Then select Search

8. You will then see a list of all Contributions that have been excluded from Receipting.

9. Next, you will use the DMS' Thank-you Tool to send your Non-Charitable / Acknowledgement Receipt to your Contacts.

Issuing Non-charitable Receipts

After following the first steps and [identifying your Non-Charitable Contributions](#), you can then issue single or multiple Non-Charitable Receipts at once.

9. From among your results, search for a specific Contribution or select either:

- (1) The specific Contributions you wish to issue Non-Charity Receipts for,

- (2) Every listed Contribution on the page, or
- (3) All Contributions in your search criteria.

The screenshot shows the 'Contributions' page in the Wellness Avenue system. At the top, there is a navigation bar with 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. A 'Settings | Help' link and a 'DMSCA DMSCA' dropdown are also present. Below the navigation is a search criteria section. The main area displays a table of contributions with columns: Received, Name, Amount, Fund, Campaign, Source, Method, Status, Receipt No., and Thanked. Three records are selected, indicated by blue checkmarks in the 'Received' column. A red box highlights the 'Actions' dropdown menu in the top left of the table, and another red box highlights the 'All 11 Records' radio button. A third red box highlights the 'Send Thank You' option in the expanded Actions menu. A footer bar contains the text 'Search for your desired Contributions'.

Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
<input type="checkbox"/> March 6th, 2023 11:53 AM	Alex Fergie	\$100.00	General Fund		DMS Manual	Cheque	Completed	-	
<input type="checkbox"/> February 24th, 2023 12:30 PM	Peppiatt Laura	\$100.00	General Fund	The 2021 Holiday Tribute Dinner	DMS Manual	Cash	Completed	-	
<input type="checkbox"/> February 9th, 2023 12:17 PM	Lucas Froese	\$100.00	In Kind		DMS Manual	In Kind	Completed	-	
<input checked="" type="checkbox"/> February 8th, 2023 01:27 PM	Lucas Froese	\$500.00	Community Outreach Fund		DMS Manual	Cash	Completed	-	
<input checked="" type="checkbox"/> January 30th, 2023 02:28 PM	Nina Can	\$75.00	Fitness		DMS Manual	Credit Card	Completed	-	
<input checked="" type="checkbox"/> January 26th, 2023 02:07 PM	Mullin Margo	\$1,000.00	General Fund	Tribute Dinner 2023	DMS Manual	Cheque	Completed	-	

10. Select the **Actions** menu at the upper-left side of the Contributions list.

11. Scroll down the **Actions** menu and select **Send Thank You**.

This screenshot is similar to the previous one, but the 'Actions' dropdown menu is open, showing options like 'Export Contributions', 'Issue Aggregated Tax Receipts', 'Issue Separate Tax Receipts', and 'Send Thank You'. The 'Send Thank You' option is highlighted with a red box. The table below shows the same list of contributions, with the 'Send Thank You' action being performed on the selected records. A footer bar contains the text 'Select Actions > Send Thank You'.

Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
Alex Fergie	\$100.00	General Fund		DMS Manual	Cheque	Completed	-	
Peppiatt Laura	\$100.00	General Fund	The 2021 Holiday Tribute Dinner	DMS Manual	Cash	Completed	-	
Lucas Froese	\$100.00	In Kind		DMS Manual	In Kind	Completed	-	
Lucas Froese	\$500.00	Community Outreach Fund		DMS Manual	Cash	Completed	-	
Nina Can	\$75.00	Fitness		DMS Manual	Credit Card	Completed	-	

12. Next, you will be directed to the page where you [thank your donors](#). On this page, you'll be using dedicated **Thank-you Templates** to send your **Non-Charitable Receipts** and can see the following fields:

Thank-you Letter Options:

- **Update thank-you dates for these contributions:** updates when the Contact was thanked for the associated Contribution as the date of when you make this Thank-you Letter.
- **Print and email options:** select the way you want to thank your Contacts.

Email Options:

- **From Email Address:** which email address is used to send this Thank-you Letter.
- **Use Template:** select an [already created Template](#) or create a new one by selecting **Save As New Template** at the bottom of the page.
- **Email/Activity Subject:** the subject of the email and the [Activity](#) associated with the Contacts after making the Thank-you Letter.

Page Format: Default PDF format:

- Format the PDF dimensions for printing and/or download.

Document Body:

- Compose your email using this standard formatting tool that uses rich-text (e.g. bold, italics, etc.).
- **Merge Fields:** formerly known as DMS Tokens, they can be used to automatically include information from a Contact in emails (e.g. “Dear {Contact First Name})

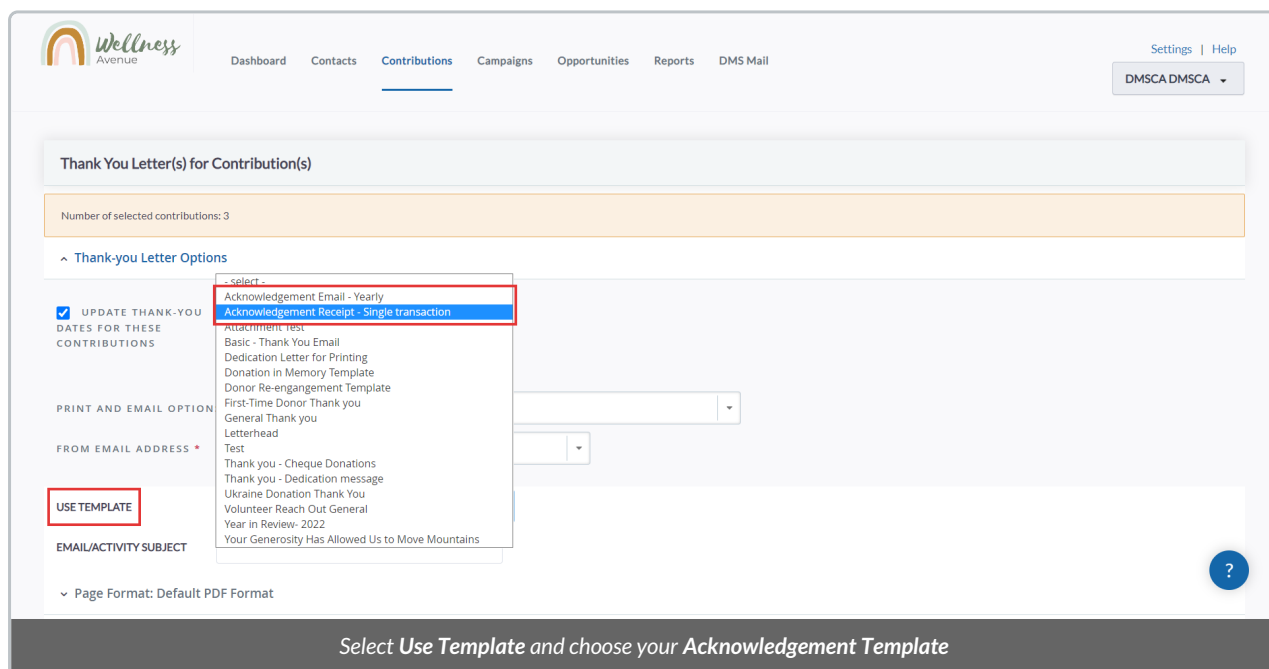
Saving Options:

- **Save As New Template:** save the created or updated contents of this Thank-You Letter as a new Template.
- **Document Type:** choose the best document format for printing and/or download.

13. Under **Use Template**, select any of the following default templates:

- **Acknowledgement Receipt – Single transaction:** Issues a Non-Charitable Receipt for the last received Contribution.
- **Acknowledgement Email – Yearly:** Issues a combined summary Non-Charitable Receipt for a Contact’s last calendar year’s Contributions.

These templates contain all the necessary information to create Non-Charitable Receipts and use **Merge Fields** to merge specific information for each selected Contact.



14. Once selected, you will see what the Non-Charitable Receipt looks like (1) and will be able to change its **Email/Activity Subject** (2)

Update thank-you dates for these contributions

Print and email options: Generate PDFs for printing (only)

From Email Address: *CanadaHelps DMS* -jullied@canadahelps.ca>

Use Template: Acknowledgement Receipt - Single transaction

Email/Activity Subject: Acknowledgement Receipt **2**

Page Format: Default PDF Format

Document Body **1**

body

See and change your Non-Charitable Receipt

15. To change the Non-Charitable Receipt's branding and formatting, follow the same steps on how to [add & manage an Email or Letter Template](#). Once you modify the template, go back to the Thank-you Letter page and select it again.

Important: we strongly recommend keeping the same Merge Fields as the original *Acknowledgement Receipt* template.

16. Fill out all the **other mandatory fields**.

17. If you modify the *Acknowledgement Receipt* template directly on the Thank-you Letter page, you can also save it as a new template by selecting **Save As New Template**.

18. Select **Update thank-you dates for these contributions** at the top left of the page if you want to update the date the associated Contacts were Thanked.

19. After all the necessary information is added, select **Make Thank-you Letters** at the bottom of the page to print and/or send emails for your Acknowledgement Receipts to the associated Contacts.