Issuing Tax Receipts in English and French

Last Modified on 06/04/2024 2:30 pm EDT

Donor Management System

Note: Tax Receipts can now be issued in French!

After adding a single or multiple Contributions, you can issue Tax Receipts to the Contacts associated with those offline Contributions.

But before issuing your first DMS tax receipt, if you haven't already,**make sure you first:**

- Configure your Tax Receipt Settings
- Modify the Default Tax Receipt Thank-You Note
- Modify the Default Tax Receipt Email Message

 Prefer to watch a **guided walk-through** of all things Tax Receipting in the DMS? Check out our **Tax Receipting Webinar**!
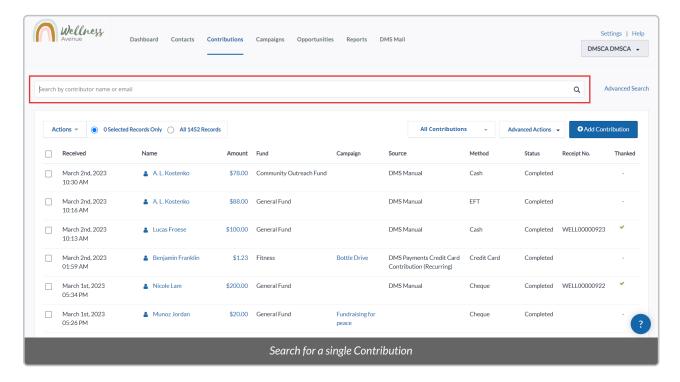
Considerations

- **English & French Tax Receipts:** Receipts will be issued based on a contact's language preference in their profile. *Note: If a donor does not have a preferred language set (or has language other than French/English), receipts will be issued in English as default.*
- Contacts with no address (1) and already receipted Contributions (2) are not eligible for Receipting. Before issuing these receipts, make sure to update your Contact (1) and issue a duplicate Tax Receipt (2).
- You can't receipt Contributions coming from CanadaHelps.org (Contributions that have their *Source* as *CanadaHelps*). CanadaHelps is the receipting party for all Online Contributions (not including **ticketed**

events) coming from CanadaHelps.org.

- When you receipt an offline Contribution in the DMS, your organization is the receipting party.
- You cannot issue Combined Tax Receipts for In-Kind Contributions due to the unique nature of each In-Kind donation.
- Tax Receipts do not display the currency of the contribution amounts (the CRA and IRS do not require it).

Issuing a Single Tax Receipt

1. Go to the **Contributions Tab**

2. **Search for the specific Contribution** you wish to issue a Tax Receipt for

Search for a single Contribution

3. Select the specific unreceipted **Contribution Amount**

Select the Contribution amount

4. On the next page, *select Issue Tax Receipt* at the top right

Important: Selecting *Issue Tax Receipt* does not immediately issue the receipt. You will be taken to a landing page where you can decide to generate a Preview or issue the receipt in multiple ways.

5. If needed, select *Preview* to see a preview of the Receipt before actually issuing it

Reminder: When you *preview* a tax receipt, the system will show a placeholder value as the receipt number. Once you select *Issue Tax Receipt*, it will be assigned a new, unique receipt number.

Preview tax receipt

6. You can choose how you would like to thank your donors with the following options:

- *Manually mark Contribution as thanked:*
  - If you'll thank your donors separately (E.g., through a phone call)
  - This Contribution will be marked as thanked and receipted in your DMS

Mark a Contribution as thanked upon receipting

- *Select from the dropdown menu the custom Thank You you wish to send with your Tax Receipt* (Note: The contact's preferred language will be displayed, so you can choose a corresponding message in the right language)

Thank You Settings

☑ Mark Contribution as thanked ❓

☑ Send a custom Thank You Message

French   Default Message ▾

7. Once you're ready to issue the Tax Receipt, select a **Delivery Method**:

- *Print*: save your Tax Receipt(s) in PDF format to print and send to your Contacts manually***, or***

- *Email:* Email the Contact with the optional custom Thank You Message and the attached PDF Tax Receipt and Download to save the receipt as a PDF (via your backend email for receipt communications).

Note: The default delivery method is **Email**. If the Contact of the donation has the **Do Not Email privacy setting** in their profile, or does not have an email on file, the Tax Receipt will be downloaded to your computer for Printing instead.

Choose a delivery method

Learn how to download and print Thank You letters with your tax receipts.

8. Select *Issue Tax Receipt.* The Tax Receipt will then be either **downloaded to your computer (for you to print), or sent** to the Contact's registered email address.

Issue tax receipt

Issuing Multiple Tax Receipts

Reminder: You cannot issue Combined Tax Receipts for In-Kind Contributions due to the unique nature of each In-Kind donation.

1. Go to the **Contributions** Tab

2. Search for a specific Contribution, or select either:

   (1) The specific Contributions you wish to issue Tax Receipts for,

   (2) Every listed Contribution on the page, or

   (3) All Contributions in your search criteria

Tip: Use Advanced Search to segment the Contributions you would like to receipt

Select Contributions

3. Select the *Actions* menu at the upper-left side of the Contributions list and select either:

- **Issue Aggregated Tax Receipts** (i.e., if John Smith made 5 donations, he will receive one tax receipt for all 5 donations)

- **Issue Separate Tax Receipts** (i.e., if John Smith made 5 donations, he will receive 5 separate tax receipts- one for each donation)

Tax receipting options

4. Depending on which option you selected, you'll then be directed to the specific Receipting Page, covered in more detail below.

Issuing Aggregated Tax Receipts

1. After selecting your desired Contributions, you will be **directed to the Combined Receipt Export Page**. You will have the chance to review and select the following:

Issue Tax Receipt Options

- *How many Contributions were selected, how many Contributions are eligible to receive an aggregated receipt, and total eligible amount*

- ***Tax Year:*** which tax year to issue the Tax Receipt(s) for.
- ***Thank you Settings:*** choose how you would like to thank your donors
- ***Delivery Method:*** choose to download (and print) or email the Tax Receipt
- ***Also re-issue duplicates:*** choose to re-send Tax Receipts for Contributions that have already been receipted within the DMS
- ***Preview***: preview how your finalized Tax Receipt(s) will look like.

2. Select ***Preview*** to see a preview of the Receipts before issuing them

> **Reminder:** When previewing combined Tax Receipts, the DMS will show a placeholder Tax Receipt Number. Don't worry- the combined tax receipt will be assigned a new, unique tax receipt number once you select *Issue Tax Receipts.*

05:26 PM							
March 1st, 2023	Tamara Rahmani	$ 20.00	General Fund	Fundraising for peace	Credit Card	Completed	Eligible
05:26 PM							
March 1st, 2023	Pilar Roca	$ 20.00	General Fund	Fundraising for peace	Cash	Completed	Eligible
05:26 PM							
March 1st, 2023	Laura Peppiatt	$ 10.00	General Fund	Christmas in July Campaign	Cash	Completed	Eligible
05:03 PM							

Delivery Method

Method   Email ▾   ❔

Back   Preview   Issue Tax Receipts

Preview your tax receipts before emailing/downloading them.

3. ***Select your desired Thank You Settings*** to choose how you would like to thank your donors:

- ***Mark Contribution as thanked:***
    - If you've already thanked your donors separately
    - These Contributions will be marked as thanked and receipted in your DMS

Mark Contribution as Thanked and send custom Thank you Message Template

- From the dropdown menu, select the **custom Thank You** **template** you wish to send with your Tax Receipt (Note: There will be two different select dropdowns for **French** and **English**, this way you can select which corresponding message will go out for each language option)

4. When you're ready to issue the Tax Receipts, select the *Delivery Method* to either:

- *Print*: save your Tax Receipt(s) in PDF format to print and send to your Contacts manually.
- *Email:* Email the Contact with the optional custom Thank You Message and the attached PDF Tax Receipt and Download to save the receipt as a PDF (via your backend email for receipt communications).

Note: The default delivery method is **Email**. If any one of the Contact(s) of the donations have the **Do Not Email privacy setting** in their profiles, or does not have an email on file, that Tax Receipt will be generated for Printing instead.

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

Receipts Details

Tax Year	2023 ▾		Contributions	9
Eligible Contacts	8		Eligible Contributions	9
Total Eligible Amount	$986.00		Ineligible Contributions	0

Thank You Settings

☑ Mark Contribution as thanked ❓
☐ Send a custom Thank You Message

Table of Users

Received	Name	Amount	Fund	Campaign	Source	Method	Status	Eligibility
March 3rd, 2023 12:56 PM	Angela Lindsay Kostenko	$ 500.00	Wellness Fund	Christmas in July	DMS Manual	Cheque	Completed	Eligible
March 2nd, 2023 04:19 PM	Nicole Lam	$ 150.00	General Fund		DMS Manual	Cheque	Completed	Eligible
March 2nd, 2023 01:34 PM	Nina Canadahelps	$ 100.00	Community Outreach Fund		DMS Manual	Cash	Completed	Eligible
March 2nd, 2023 10:30 AM	A. L. Kostenko	$ 78.00	Community Outreach Fund		DMS Manual	Cash	Completed	Eligible
March 2nd, 2023 10:16 AM	A. L. Kostenko	$ 88.00	General Fund		DMS Manual	EFT	Completed	Eligible
March 1st, 2023 05:26 PM	Daniel Poliziani	$ 20.00	General Fund	Fundraising for peace		Cash	Completed	Eligible
March 1st, 2023 05:26 PM	Tamara Rahmani	$ 20.00	General Fund	Fundraising for peace		Credit Card	Completed	Eligible
March 1st, 2023 05:26 PM	Pilar Roca	$ 20.00	General Fund	Fundraising for peace		Cash	Completed	Eligible
March 1st, 2023 05:03 PM	Laura Peppiatt	$ 10.00	General Fund	Christmas in July Campaign		Cash	Completed	Eligible

Delivery Method

Method   Email ▾ ❓

[Back] [Preview] [Issue Tax Receipts]

Select delivery method

5. Then, select *Issue Tax Receipts.* The Tax Receipt(s) will then be **downloaded or sent** to the Contacts' registered email address.
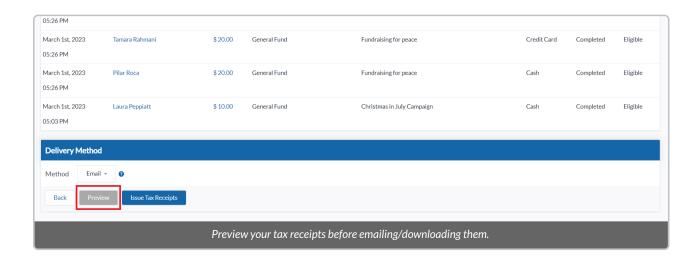
Issuing Separate Tax Receipts

1. After selecting your desired Contributions, you will be directed to the **Separate Receipt landing page**. You will have the chance to review and select the following:

Receipts Details

Tax Year	2023 ▾	Contributions	8
Eligible Contacts	8	Eligible Contributions	8
Total Eligible Amount	$120.00	Ineligible Contributions	0

Thank You Settings

☑ Mark Contribution as thanked ❓

☐ Send a custom Thank You Message

Table of Users

Received	Name	Amount	Fund	Campaign	Source	Method	Status	Eligibility
March 1st, 2023 05:26 PM	Daniel Poliziani	$ 20.00	General Fund	Fundraising for peace		Cash	Completed	Eligible
March 1st, 2023 05:26 PM	Tamara Rahmani	$ 20.00	General Fund	Fundraising for peace		Credit Card	Completed	Eligible
March 1st, 2023 05:26 PM	ya sachdeva	$ 20.00	General Fund	Fundraising for peace		Cheque	Completed	Eligible
March 1st, 2023 05:26 PM	Pilar Roca	$ 20.00	General Fund	Fundraising for peace		Cash	Completed	Eligible
March 1st, 2023 05:03 PM	Laura Peppiatt	$ 10.00	General Fund	Christmas in July Campaign		Cash	Completed	Eligible
March 1st, 2023 05:03 PM	Cristina Nieto	$ 10.00	General Fund	Christmas in July Campaign		Cheque	Completed	Eligible
March 1st, 2023 05:03 PM	Bridget Jones	$ 10.00	General Fund	Christmas in July Campaign		Cash	Completed	Eligible
March 1st, 2023 05:03 PM	Hovsta Brown	$ 10.00	General Fund	Christmas in July Campaign		Cheque	Completed	Eligible

Delivery Method

☐ Also re-issue duplicates

Method   Email ▾ ❓

[Back] [Preview] [Issue Tax Receipts]
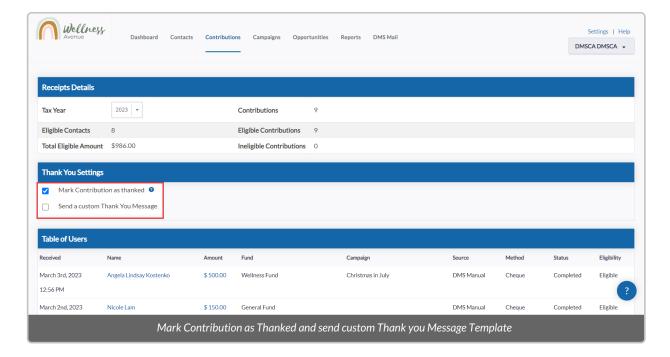
Issue separate receipts landing page

- ***How many Contributions were selected, how many Contributions are eligible to receive an aggregated receipt, and total eligible amount***
- ***Thank you Settings:*** *choose how you would like to thank your donors*
- ***Delivery Method:*** *choose to print or email the Tax Receipt*
- ***Also re-issue duplicates:*** *choose to re-send Tax Receipts for Contributions that have already been receipted within the DMS*
- ***Preview****: preview how your finalized Tax Receipt(s) will look like.*

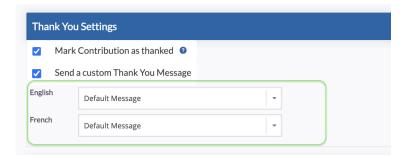2. Select ***Preview*** to see a preview of the Receipts before actually issuing them

> **Reminder:** When previewing multiple separate Tax Receipts, the DMS will show the same placeholder Tax Receipt Number on every receipt. Don't worry- each tax receipt will be assigned a new, unique tax receipt number once you select *Issue Tax Receipts*.

Receipts Details

Tax Year	2023 ▾		Contributions	8
Eligible Contacts	8		Eligible Contributions	8
Total Eligible Amount	$120.00		Ineligible Contributions	0

Thank You Settings

☑ Mark Contribution as thanked ❓
☐ Send a custom Thank You Message

Table of Users

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March 1st, 2023 05:26 PM	Pilar Roca	$ 20.00	General Fund	Fundraising for peace		Cash	Completed	Eligible
March 1st, 2023 05:03 PM	Laura Peppiatt	$ 10.00	General Fund	Christmas in July Campaign		Cash	Completed	Eligible
March 1st, 2023 05:03 PM	Cristina Nieto	$ 10.00	General Fund	Christmas in July Campaign		Cheque	Completed	Eligible
March 1st, 2023 05:03 PM	Bridget Jones	$ 10.00	General Fund	Christmas in July Campaign		Cash	Completed	Eligible
March 1st, 2023 05:03 PM	Hovsta Brown	$ 10.00	General Fund	Christmas in July Campaign		Cheque	Completed	Eligible

Delivery Method

☐ Also re-issue duplicates
Method Email ▾ ❓

[Back] [Preview] [Issue Tax Receipts]

Preview separate tax receipts

3. If you have selected contributions that already have a DMS Receipt issued and would like to re-send these receipts, select *Also re-issue duplicates*.

Settings	Help							

Receipts Details

Tax Year	2023	Contributions	8
Eligible Contacts	8	Eligible Contributions	8
Total Eligible Amount	$120.00	Ineligible Contributions	0

Thank You Settings

☑ Mark Contribution as thanked ❓
☐ Send a custom Thank You Message

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March 1st, 2023 05:03 PM	Hovsta Brown	$ 10.00	General Fund	Christmas in July Campaign		Cheque	Completed	Eligible

Delivery Method

☑ Also re-issue duplicates

Method Email ▾ ❓

[Back] [Preview] [Issue Tax Receipts]

Also issue duplicate receipts

4. *Select your desired Thank You Settings* to choose how you would like to thank your donors:

- *Mark Contribution as thanked:*
  - If you've already thanked your donors separately
  - This Contribution will be marked as thanked and receipted in your DMS

Mark Contribution as Thanked (override)

- **Select from the dropdown menu the custom Thank You you wish to send with your Tax Receipt** (Note: There will be two different select dropdowns for **French** and **English**, this way you can select which corresponding message will go out for each language option)

5. When you're ready to issue the Tax Receipts, select the *Delivery Method* to either:

- *Print*: save your Tax Receipt(s) in PDF format to print and send to your Contacts manually.
- *Email:* Email the Contact with the optional custom Thank You Message and the attached PDF Tax Receipt and Download to save the receipt as a PDF (via your backend email for receipt communications).

Note: The default delivery method is **Email**. If the Contact of the donation has the **Do Not Email privacy setting** in their profile, or does not have an email on file, the Tax Receipt will be generated for Printing instead.

6. Then, select *Issue Tax Receipts.* The Tax Receipts will then either be downloaded to your computer, or sent to the Contacts' registered email address.

Wellness Avenue

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

DMSCA DMSCA ▾

Receipts Details

Tax Year	2023 ▾	Contributions	8
Eligible Contacts	8	Eligible Contributions	8
Total Eligible Amount	$120.00	Ineligible Contributions	0

Thank You Settings

☑ Mark Contribution as thanked ⊙
☐ Send a custom Thank You Message

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March 1st, 2023 05:03 PM	Hovsta Brown	$ 10.00	General Fund	Christmas in July Campaign		Cheque	Completed	Eligible

Delivery Method

☑ Also re-issue duplicates

Method   Email ▾ ⊙

Back   Preview   **Issue Tax Receipts**

Issue separate tax receipts