

# 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](#)

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📺 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 receiving 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

The screenshot shows the 'Contributions' tab in the Wellness Avenue DMS. A search bar at the top is highlighted with a red box. Below it, a table lists contributions with columns for Received, Name, Amount, Fund, Campaign, Source, Method, Status, Receipt No., and Thanked. The contribution for Lucas Froese with an amount of \$100.00 is selected. A blue question mark icon is visible in the bottom right corner of the table area.

Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
<input type="checkbox"/>	March 2nd, 2023 10:30 AM	A. L. Kostenko	\$78.00	Community Outreach Fund	DMS Manual	Cash	Completed	-	-
<input type="checkbox"/>	March 2nd, 2023 10:16 AM	A. L. Kostenko	\$88.00	General Fund	DMS Manual	EFT	Completed	-	-
<input checked="" 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	✓
<input type="checkbox"/>	March 1st, 2023 05:26 PM	Munoz Jordan	\$20.00	General Fund	March Fundraising for peace	Cheque	Completed	-	-

Search for a single Contribution

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

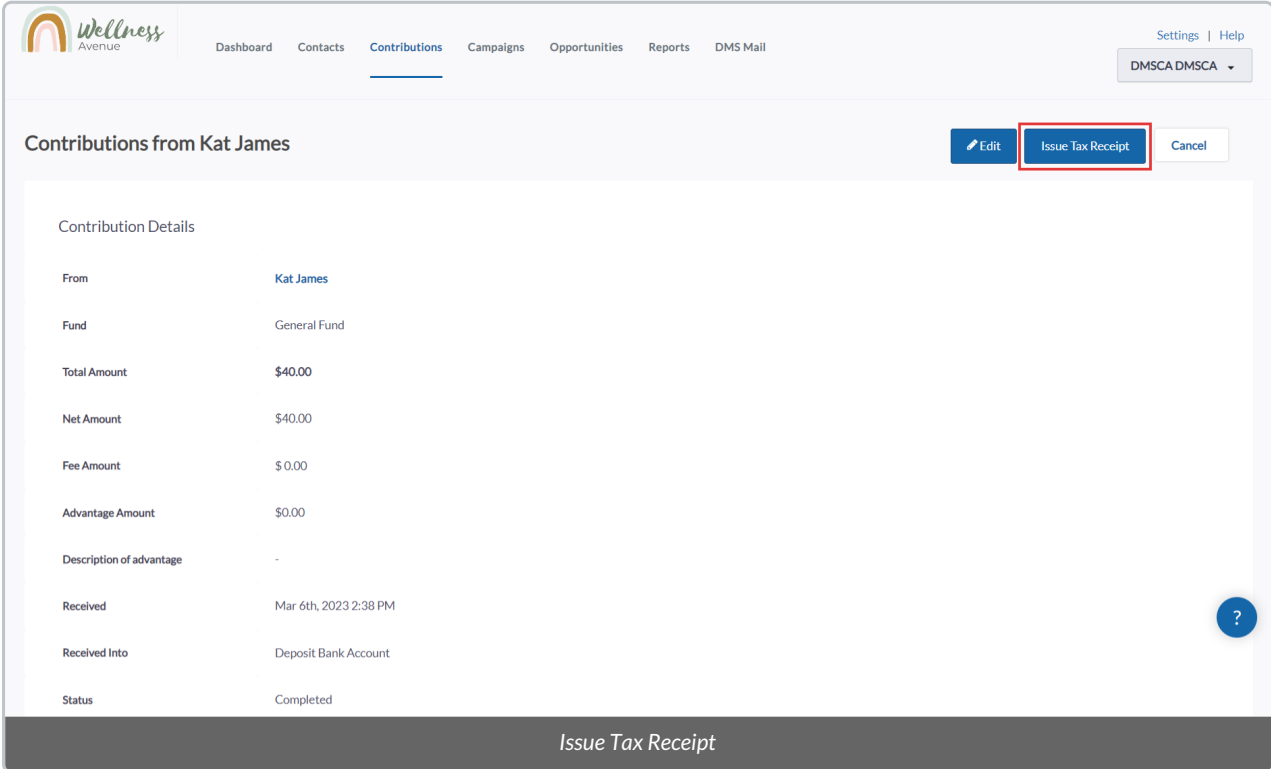
The screenshot shows the 'Contributions' tab in the Wellness Avenue DMS. A search bar is at the top. Below it, a table lists contributions. The contribution for Kat James with an amount of \$40.00 is selected. The amount and the empty receipt number field are highlighted with red boxes.

Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
<input checked="" type="checkbox"/>	March 6th, 2023 02:38 PM	Kat James	\$40.00	General Fund	Fundraising for peace	DMS Manual	Cash	Completed	
<input type="checkbox"/>	March 6th, 2023 02:16 PM	Rahmani Tamara	\$500.00	General Fund	Bottle Drive	DMS Manual	Cheque	Completed	WELL00000931
<input type="checkbox"/>	March 6th, 2023 12:23 PM	Lucas Froese	\$100.00	General Fund	Great Canadian Giving Challenge	DMS Manual	Cheque	Completed	WELL00000929

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.



The screenshot shows the 'Wellness Avenue' dashboard with the 'Contributions' tab selected. The page title is 'Contributions from Kat James'. In the top right corner, there are buttons for 'Edit', 'Issue Tax Receipt' (highlighted with a red box), and 'Cancel'. Below the title is a table of contribution details.

Contribution Details	
From	Kat James
Fund	General Fund
Total Amount	\$40.00
Net Amount	\$40.00
Fee Amount	\$ 0.00
Advantage Amount	\$0.00
Description of advantage	-
Received	Mar 6th, 2023 2:38 PM
Received Into	Deposit Bank Account
Status	Completed

At the bottom of the page, there is a dark grey bar with the text 'Issue Tax Receipt'.

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.

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

Tax Receipt

**Receipt Details**

Receipt Status Not Issued Yet

**Thank You Settings**

Mark Contribution as thanked ⓘ

Send a custom Thank You Message

**Delivery Method**

Method Email ⓘ

Back Preview Issue Tax Receipt

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**

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

Tax Receipt

**Receipt Details**

Receipt Status Not Issued Yet

**Thank You Settings**

Mark Contribution as thanked ⓘ

Send a custom Thank You Message

**Delivery Method**

Method Email ⓘ

Back Preview Issue Tax Receipt

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.

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

### Tax Receipt

#### Receipt Details

Receipt Status Not Issued Yet

#### Thank You Settings

- Mark Contribution as thanked
- Send a custom Thank You Message

Basic - Thank You Email

HTML Format

Merge Fields

Source

Styles Format

Thank you, {contact.first\_name}!

Dear {contact.display\_name},

On behalf of everyone at {domain name} I want to thank you for your recent contribution of {contribution.total\_amount} on {contribution.receive\_date}. With your generous support we're better able to achieve our important charitable mission.

Delivery

Method Email

Back Preview Issue Tax Receipt

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.

The screenshot shows the 'Tax Receipt' configuration page in the Wellness Avenue system. The page is divided into several sections:

- Receipt Details:** Shows 'Receipt Status' as 'Not Issued Yet'.
- Thank You Settings:** Includes checkboxes for 'Mark Contribution as thanked' and 'Send a custom Thank You Message'. A dropdown menu is set to 'Basic - Thank You Email'.
- HTML Format:** A rich text editor with a toolbar and a preview window. The preview shows a 'Thank you, {contact.first\_name}!' message and a paragraph of text: 'Dear {contact.display\_name}, On behalf of everyone at {domain.name} I want to thank you for your recent contribution of {contribution.total\_amount} on {contribution.receive\_date}. With your generous support we're better able to achieve our important charitable mission.'
- Delivery Method:** The 'Method' is set to 'Email'. There are three buttons: 'Back', 'Preview', and 'Issue Tax Receipt' (which is highlighted with a red box).

At the bottom of the page, there is a dark grey bar with the text '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

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

Search by contributor name or email [Q] Advanced Search

Actions ▾  3 Selected Records Only  All 1430 Records <sup>3</sup>

Received <sup>2</sup>

	Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
<input type="checkbox"/>	March 1st, 2023 09:41 AM	Noboru K	\$50.00 (Recurring)	2023	Monthly Giving Webinar	DMS Manual	Cheque	Completed		✓
<input checked="" type="checkbox"/>	March 1st, 2023 09:19 AM	Alex Fergie	\$100.00	General Fund		DMS Manual	Cheque	Completed	WELL00000913	✓
<input type="checkbox"/>	March 1st, 2023 01:52 AM	Noboru K	\$1.00	2023	Monthly Giving Webinar	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed		-
<input type="checkbox"/>	March 1st, 2023 01:51 AM	Benjamin Franklin	\$1.23	Fitness	Bottle Drive	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed		-
<input checked="" type="checkbox"/>	February 28th, 2023 06:30 PM	Nicole Lam	\$250.00	General Fund		DMS Manual	Cheque	Completed	WELL00000912	✓
<input checked="" type="checkbox"/>	February 28th, 2023 03:40 PM	Lucas Froese	\$50.00	General Fund		DMS Manual	Cheque	Completed	WELL00000911	✓
<input type="checkbox"/>	February 28th, 2023	Nicole Lam	\$150.00	General Fund		DMS Manual	Cheque	Completed		-

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)

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

Search by contributor name or email [Q] Advanced Search

Actions ▾  50 Selected Records Only  All 1474 Records

Export Contributions

- Issue Aggregated Tax Receipts
- Issue Separate Tax Receipts
- Send Thank You 02:16 PM

	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked	
<input type="checkbox"/>	Kat James	\$40.00	General Fund	Fundraising for peace	DMS Manual	Cash	Completed	WELL00000932	✓	
<input type="checkbox"/>	Rahmani Tamara	\$500.00	General Fund	Bottle Drive	DMS Manual	Cheque	Completed	WELL00000931	✓	
<input checked="" type="checkbox"/>	March 6th, 2023 12:23 PM	Lucas Froese	\$100.00	General Fund	Great Canadian Giving Challenge Donation Form	DMS Manual	Cheque	Completed	WELL00000929	✓
<input checked="" type="checkbox"/>	March 6th, 2023 11:50 AM	Jacob O'Connor	\$75.00	Mental Health Initiative		DMS Manual	Cheque	Completed	WELL00000930	✓
<input checked="" type="checkbox"/>	March 6th, 2023 11:34 AM	Lucas Froese	\$1,000.00	General Fund	Golf Tournament	DMS Manual	Cheque	Completed	WELL00000928	✓
<input checked="" type="checkbox"/>	March 6th, 2023 02:26 AM	Maya Karolina	\$1.23 (Recurring)	Fitness		DMS Payments Credit Card	Credit Card	Completed		-

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:

**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

Buttons: Back, Preview, Issue Tax Receipts

*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 Pepplatt	\$ 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**

The screenshot shows the 'Contributions' page in the Wellness Avenue system. It includes a navigation menu with 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. The 'Receipts Details' section shows a summary for the year 2023: 9 Contributions, 8 Eligible Contacts, and a Total Eligible Amount of \$986.00. The 'Thank You Settings' section has two options: 'Mark Contribution as thanked' (checked) and 'Send a custom Thank You Message' (unchecked). Below is a 'Table of Users' with columns for Received, Name, Amount, Fund, Campaign, Source, Method, Status, and Eligibility. Two entries are shown: one for Angela Lindsay Kostenko on March 3rd, 2023, and one for Nicole Lam on March 2nd, 2023. A dark banner at the bottom reads '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)

This close-up shows the 'Thank You Settings' form. The 'Send a custom Thank You Message' checkbox is checked. Below it, there are two dropdown menus for selecting a default message template for 'English' and 'French'. Both dropdowns currently show 'Default Message'.

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

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.

**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

Buttons: Back | Preview | **Issue Tax Receipts**

*Issue aggregate tax receipt/s*

## 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 ▾ ⓘ

*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*.

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

### 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

*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*.

**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

*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**



The screenshot shows the 'Contributions' section of the Wellness Avenue system. It includes a navigation bar with 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. The 'Receipts Details' section shows a tax year of 2023 with 8 contributions, 8 eligible contacts, and a total eligible amount of \$120.00. The 'Thank You Settings' section has two options: 'Mark Contribution as thanked' (checked) and 'Send a custom Thank You Message' (unchecked). The 'Table of Users' section contains a table with columns: Received, Name, Amount, Fund, Campaign, Source, Method, Status, and Eligibility. Two entries are shown for March 1st, 2023, both for a \$20.00 contribution to the 'General Fund' for the 'Fundraising for peace' campaign. The first entry is via 'Cash' and the second via 'Credit Card'. A button at the bottom of the table reads '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)

This close-up screenshot focuses on the 'Thank You Settings' section. It shows the 'Mark Contribution as thanked' checkbox checked. Below it, the 'Send a custom Thank You Message' checkbox is also checked. A green box highlights two dropdown menus: one for 'English' and one for 'French', both currently set to 'Default Message'.

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.

### 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 tax receipts*