

Issuing Yearly Tax Receipts

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Donor Management System

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After adding a [single](#) or [multiple](#) Contributions, you may want to issue a **Single Yearly Tax Receipt** to the Contact associated with those offline Contributions.

- Learn how to [modify the Default Tax Receipt Email](#)
- Learn how to [modify the Default Tax Receipt PDF Message](#)

Considerations

- **Contacts with no address** (1) and **already receipted Contributions** (2) are not eligible for Receipting. Before issuing these receipts, you have to [update your Contact](#) (1) and [issue a duplicate Tax Receipt](#) (2).
- **You cannot 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.
- The **Archive Email** address [you've configured](#) will always receive a copy of the tax receipt issued.
- **Only one annual tax receipt can be issued per donor, per year.** If you void the receipt or record any other Contributions for a donor after issuing their annual receipt, those Contributions *must be receipted one at a time* or *selected together and issued as a Combined receipt*.

Issuing a Yearly Tax Receipt

1. Go to the **Contacts Tab**

2. Select either:

- (1) **The specific Contacts** you wish to issue a Yearly Tax Receipt for,
- (2) **Every listed Contact on the page**, or
- (3) **All Contacts** in your search criteria

Tip: Use [Advanced Search](#) to segment the Contacts you would like to receipt

The screenshot shows the 'Contacts' page in the Wellness Avenue system. At the top, there are navigation tabs: Dashboard, **Contacts**, Contributions, Campaigns, Opportunities, Reports, and DMS Mail. On the right, there are links for Settings and Help, and a 'DMSCA DMSCA' button. A search bar is present with the text 'Search by contact name or email' and a magnifying glass icon, followed by a link to 'Advanced Search'. Below the search bar, there are two radio buttons: '4 Selected Records Only' (selected) and 'All 174 Records'. To the right of these are three buttons: 'All contacts', 'Advanced Actions', and 'Add Contact'. The main area is a table of contacts with columns: Name, City, Province, Phone, Email, Date Created, and Last Modified. The first three rows are partially visible. The fourth row, 'Alex Fergie', is highlighted with a red box and a '1' next to its selection checkbox. The fifth row, 'Alex Fergie', has its selection checkbox highlighted with a red box and a '2' next to it. The sixth row, 'Alicia Mitre', has its selection checkbox highlighted with a red box and a '3' next to it. At the bottom of the page, there is a dark grey bar with the text 'Select Contacts'.

	Name	City	Province	Phone	Email	Date Created	Last Modified
<input checked="" type="checkbox"/>	A. Amadu	Toronto	ON		amadua@canadahelps.org	Jul 13th, 2022 5:12 PM	Feb 24th, 2023 2:57 PM
<input checked="" type="checkbox"/>	A. L. Kostenko	Toronto	ON		angelakostenko88@gmail.com	Jul 7th, 2022 11:53 AM	Feb 23rd, 2023 1:21 PM
<input type="checkbox"/>	Accessibility Foundation					Nov 24th, 2022 6:05 PM	Feb 14th, 2023 11:17 AM
<input type="checkbox"/>	aine@ainemcglynn.com				aine@ainemcglynn.com	Jun 24th, 2022 10:09 AM	Oct 26th, 2022 2:17 PM
<input checked="" type="checkbox"/>	Alex Fergie	London	ON	5145216699	jubino+woodcoaster@canadahelps.org	Apr 20th, 2022 12:46 PM	Feb 24th, 2023 11:27 AM
<input type="checkbox"/>	Alex Fergie					Oct 6th, 2022 12:48 PM	Jan 26th, 2023 2:12 PM
<input checked="" type="checkbox"/>	Alicia Mitre	Mississauga	ON		amitreetatwell@outlook.com	Oct 19th, 2022 2:01 PM	Feb 24th, 2023 2:39 PM

3. After selecting your desired Contacts, select **Actions**, then **Issue Annual Tax Receipts**.

This screenshot shows the same 'Contacts' page as the previous one, but with the 'Actions' dropdown menu open. The menu options are: Delete, Export, **Issue Annual Tax Receipts** (highlighted with a red box), Merge Contacts, and Print Mailing Labels. The table of contacts is visible behind the menu. The '4 Selected Records Only' radio button is still selected. At the bottom of the page, there is a dark grey bar with the text 'Issue annual tax receipts'. A blue question mark icon is visible in the bottom right corner of the page.

	City	Province	Phone	Email	Date Created	Last Modified	
	Toronto	ON		amadua@canadahelps.org	Jul 13th, 2022 5:12 PM	Feb 27th, 2023 3:59 PM	
	Toronto	ON		amadua@canadahelps.org	Feb 27th, 2023 4:40 PM	Feb 27th, 2023 4:50 PM	
	Toronto	ON		angelakostenko88@gmail.com	Jul 7th, 2022 11:53 AM	Mar 3rd, 2023 12:58 PM	
					Nov 24th, 2022 6:05 PM	Feb 14th, 2023 11:17 AM	
<input type="checkbox"/>	aine@ainemcglynn.com			aine@ainemcglynn.com	Jun 24th, 2022 10:09 AM	Oct 26th, 2022 2:17 PM	
<input type="checkbox"/>	Aleph Roger	Ottawa	ON	456-857-8956	raleph@gmail.com	Oct 19th, 2022 2:01 PM	Mar 1st, 2023 5:17 PM
<input type="checkbox"/>	Alex Fergie	London	ON	5145216699	jubino+woodcoaster@canadahelps.org	Apr 20th, 2022 12:46 PM	Mar 6th, 2023 3:53 PM
<input type="checkbox"/>	Alicia Mitre	Mississauga	ON		amitreetatwell@outlook.com	Oct 19th, 2022 2:01 PM	Feb 24th, 2023 2:39 PM
<input checked="" type="checkbox"/>	Anderson Ada	Burlington	ON	333-555-8888	anderson.a@test.com	Oct 21st, 2021 11:52 AM	Feb 24th, 2023 1:40 PM

4. Select the Tax Year for which you want to issue an Annual Receipt.

Wellness Avenue

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

Settings | Help

DMSCA DMSCA

Receipts Details

Tax Year 2023

Receipts 1 Contributions 2

Thank You Settings

Mark Contribution as thanked

Send a custom Thank You Message

Delivery Method

Method Email

Back Preview Issue Tax Receipts

Select tax year

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

Note: When previewing multiple Annual Tax Receipts, the Tax Receipt Numbers on each individual receipt will show up as the same. The numbers will be unique once you issue the Annual Tax Receipts.

Wellness Avenue

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

Settings | Help

DMSCA DMSCA

Receipts Details

Tax Year 2023

Receipts 1 Contributions 2

Thank You Settings

Mark Contribution as thanked

Send a custom Thank You Message

Delivery Method

Method Email

Back Preview Issue Tax Receipts

Preview annual receipts

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

- **Mark Contribution as thanked:**
 - If you thank your donors separately
 - This Contribution will be marked as thanked and received in your DMS
- **Send a custom Thank You Email Message**
 - Thank your Contacts via email for their Contribution along with their Tax Receipt using the DMS

- Select custom Thank you [Message Templates](#) to be sent with the tax receipt
- This Contribution will be [marked as thanked and receipted in your DMS](#)

Note: Sending a Thank You Email Message will only work if you are issuing the Tax Receipt via Email as well. To send out Thank You Emails or Letters separately, [please follow our steps here](#).

The screenshot shows the 'Wellness Avenue' DMS interface. The navigation menu includes Dashboard, **Contacts**, Contributions, Campaigns, Opportunities, Reports, and DMS Mail. The 'Settings | Help' menu is also visible. The 'Receipts Details' section shows 'Tax Year' as 2023, with 1 Receipt and 2 Contributions. The 'Thank You Settings' section has two options: 'Mark Contribution as thanked' (checked) and 'Send a custom Thank You Message' (unchecked). The 'Delivery Method' is set to 'Email'. At the bottom, there are 'Back', 'Preview', and 'Issue Tax Receipts' buttons. A footer message reads 'Decide your Thank You Settings'.

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

- **Print:** save your Tax Receipt(s) in PDF format to your computer so you can print and send it 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 generated for Printing instead.

Wellness Avenue

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

Settings | Help
DMSCA DMSCA

Receipts Details

Tax Year 2023

Receipts 1 Contributions 2

Thank You Settings

Mark Contribution as thanked

Send a custom Thank You Message

Delivery Method

Method Email

Back Preview Issue Tax Receipts

Select delivery method

8. Select **Issue Tax Receipt**. The annual Tax Receipt will then be either **downloaded to your computer** or **sent to the Contact's registered email address** (depending on the Delivery Method selected above):

Note: This action cannot be reversed. To cancel a Tax Receipt, please follow these steps.

Wellness Avenue

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

Settings | Help
DMSCA DMSCA

Receipts Details

Tax Year 2023

Receipts 1 Contributions 2

Thank You Settings

Mark Contribution as thanked

Send a custom Thank You Message

Delivery Method

Method Email

Back Preview Issue Tax Receipts

Issue annual tax receipt

