

Issuing a Corrected Tax Receipt

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Issuing a Corrected Tax Receipt

Donor Management System

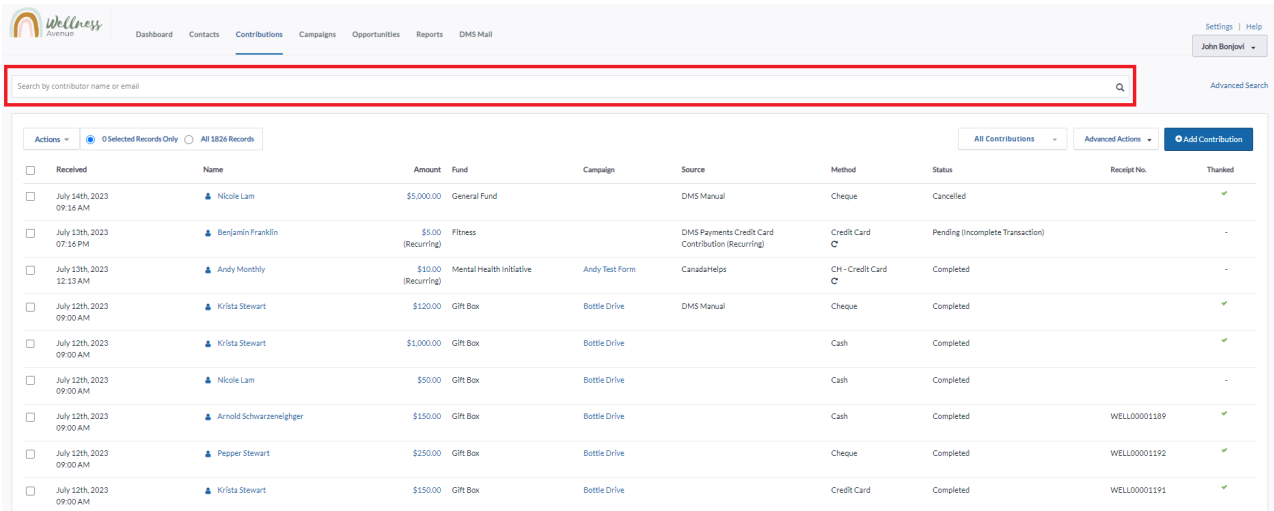
If you issue a Tax Receipt with any mistakes, you can easily fix the mistake, void the receipt and reissue a corrected Tax Receipt through the DMS.

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1. Visit the Contributions Tab

2. Search for the Contribution of whose Tax Receipt you'd like to void



Wellness
Revenue

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

Settings | Help
John Bonjovi

Search by contributor name or email

Actions | 0 Selected Records Only | All 1826 Records

All Contributions | Advanced Actions | Add Contribution

Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
<input type="checkbox"/>	July 14th, 2023 09:16 AM	Nicole Lam	\$5,000.00	General Fund		DMS Manual	Cheque	Cancelled	✓
<input type="checkbox"/>	July 13th, 2023 07:16 PM	Benjamin Franklin	\$5.00 (Recurring)	Fitness		DMS Payments Credit Card Contribution (Recurring)	Credit Card C	Pending (Incomplete Transaction)	-
<input type="checkbox"/>	July 13th, 2023 12:13 AM	Andy Monthly	\$10.00 (Recurring)	Mental Health Initiative	Andy Test Form	CanadaHelps	CH - Credit Card C	Completed	-
<input type="checkbox"/>	July 12th, 2023 09:00 AM	Krista Stewart	\$120.00	Gift Box	Bottle Drive	DMS Manual	Cheque	Completed	✓
<input type="checkbox"/>	July 12th, 2023 09:00 AM	Krista Stewart	\$1,000.00	Gift Box	Bottle Drive		Cash	Completed	✓
<input type="checkbox"/>	July 12th, 2023 09:00 AM	Nicole Lam	\$50.00	Gift Box	Bottle Drive		Cash	Completed	-
<input type="checkbox"/>	July 12th, 2023 09:00 AM	Arnold Schwarzenegger	\$150.00	Gift Box	Bottle Drive		Cash	Completed	WELL00001189 ✓
<input type="checkbox"/>	July 12th, 2023 09:00 AM	Pepper Stewart	\$250.00	Gift Box	Bottle Drive		Cheque	Completed	WELL00001192 ✓
<input type="checkbox"/>	July 12th, 2023 09:00 AM	Krista Stewart	\$150.00	Gift Box	Bottle Drive		Credit Card	Completed	WELL00001191 ✓

3. Click on Contribution's Amount

Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
<input type="checkbox"/>	July 14th, 2023 01:18 PM	\$500.00	General Fund		DMS Manual	Cheque	Completed	WELL00001201	✓
<input type="checkbox"/>	July 14th, 2023 09:16 AM	\$5,000.00	General Fund		DMS Manual	Cheque	Cancelled		✓
<input type="checkbox"/>	July 12th, 2023 09:00 AM	\$50.00	Gift Box	Bottle Drive		Cash	Completed		-
<input type="checkbox"/>	July 11th, 2023 03:13 PM	\$500.00	General Fund		DMS Manual	Cheque	Completed	WELL00001188	✓
<input type="checkbox"/>	July 11th, 2023 02:25 PM	\$2,000.00	General Fund		DMS Manual	Cash	Completed	WELL00001184	✓

4. On the next page, select **Edit** on the top-right

Contributions from Nicole Lam

[Edit](#) [Manage Receipt](#) [Cancel](#)

Contribution Details

From	Nicole Lam
Fund	General Fund
Total Amount	\$500.00
Net Amount	\$500.00
Fee Amount	\$ 0.00
Advantage Amount	\$ 0.00

5. Under **Contribution Amount**, change the amount to the correct amount and **Save** (here we are changing \$500 to \$50).

Save Save and New Cancel

CONTRIBUTOR
Nicole Lam

TOTAL AMOUNT *
CAD (\$) 50.00

DATE RECEIVED *
07/14/2023 01:18PM
The date this contribution was received.

FUND *
General Fund

CH FUND
-select CH Fund-

CAMPAIGN
-select-

SOURCE + Add New Source
DMS Manual

CONTRIBUTION STATUS

6. On the next screen, click the new **Contribution Amount** on the **Contacts Contribution Page**.

Wellness Avenue Dashboard | Contributions | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | John Bonjovi

Nicole Lam | Actions | Edit

Contributions 230 | DMS Recurring Contributions

Current Year-To-Date - \$17,200.00 | # Completed Contributions - 68 | Avg Amount - \$252.94

Total - \$75,165.00 | # Completed - 228 | Avg - \$329.67 | Cancelled/Refunded - \$5,200.00

Click arrow to view payment details. | Add Contribution

Received	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
July 14th, 2023 01:18 PM	\$50.00	General Fund		DMS Manual	Cheque	Completed	WELL0001204	✓
July 14th, 2023 09:16 AM	\$5,000.00	General Fund		DMS Manual	Cheque	Cancelled		✓
July 12th, 2023 09:00 AM	\$50.00	Gift Box	Bottle Drive		Cash	Completed		✓

7. Then, select **Manage Receipt**.

Wellness Avenue Dashboard | Contributions | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | John Bonjovi

Contributions from Nicole Lam | Edit | Manage Receipt | Cancel

Contribution Details

From	Nicole Lam
Fund	General Fund
Total Amount	\$50.00
Net Amount	\$50.00
Fee Amount	\$0.00

8. On the next screen, select **Void Receipt**. Note: Once voided, the receipt will display the **Cancel** and **Replaces Receipt No.** field.

Tax Receipt

Receipt Details

Receipt No.	WELL0001204	Issue Date	Jul 14th, 2023 3:08 PM
Receipt Status	Issued	Issued By	jubino+hgfyt@canadahelps.org (91)
Type	Single	Method	Email
Amount	\$50.00	Email Opened	

Cancel and Replaces Receipt No. WELL0001201

Thank You Settings

Mark Contribution as thanked ⓘ

Send a custom Thank You Message

Delivery Method

Method: Email ⓘ

Back | Email Duplicate Tax Receipt | Void Receipt

9. After that, select **Replace Receipt**.

Tax Receipt

Receipt Details			
Receipt No.	WELL00001201	Issue Date	Jul 14th, 2023 1:19 PM
Receipt Status	Cancelled	Issued By	jubino+hgfyt@canadahelps.org (91)
Type	Single	Method	Print
Amount	\$500.00	Email Opened	

Thank You Settings

Mark Contribution as thanked

Send a custom Thank You Message

Delivery Method

Method: Email

10. Now when viewing **Contribution Details** or the **Tax Receipt**, the **Receipt number** and **Cancelled Receipt number** will Display.

Receipt Number WELL00001204

Cancelled Receipt Number WELL00001201

Contribution Details

Official Tax Receipt For Income Tax Purposes

WELLNESS AVENUE
Charitable Registration #: 10000-000-RR0002
186 Spadina Avenue
Toronto ON M5T 3B2



Receipt #: WELL00001204
Replaces and Cancels Receipt #: WELL00001201
Receipt Issued: 2023-07-14
Location Issued: Toronto, Ontario
Donation Received: 2023-07-14
Donation Amount: \$50.00
Eligible Amount of Gift: \$50.00

Donated by:
 Nicole Lam
 111
 North Van BC M3B 1G8
 Canada

Authorized Signature


Canada Revenue Agency - canada.ca/charities-giving

Tax Receipt PDF

Reporting and Double Counting

Don't worry! The DMS prevents any wrong Receipt and Contribution from being double-counted on your **Reports**:

- Contributions that have their **Status** as **Cancelled** will be filtered out from your Reports.
- You can also **filter them** manually by **Contribution Status**.

Important: Please follow the instructions above to ensure that you [remain compliant with the Canadian Revenue Agency \(CRA\)](#) when correcting a Tax Receipt.