

# Issuing In Kind Receipts

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## Donor Management System

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In Kind Receipts in the DMS have the same format as regular Tax Receipts and are fully compliant with the CRA.

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

In Kind Receipts have In Kind only fields that you can set per Contribution, related to appraisals and the property being donated. Only the fields you fill out will display on the Tax Receipt.

^ In Kind donation fields

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DESCRIPTION OF PROPERTY \*

APPRAISED BY \*

ADDRESS OF APPRAISER \*

# Adding a Single Contribution with In Kind Fields

1. Go to the **Contributions Tab**
2. Select **Add Contribution** on the top right corner of the screen

The screenshot shows the 'Contributions' page in the Wellness Avenue system. The page includes a navigation bar with 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. A search bar is located at the top, and a 'DMSCA DMSCA' dropdown menu is on the right. Below the search bar, there are filters for 'Actions', '0 Selected Records Only', and 'All 1430 Records'. A table of contributions is displayed with columns for 'Received', 'Name', 'Amount', 'Fund', 'Campaign', 'Source', 'Method', 'Status', 'Receipt No.', and 'Thanked'. The 'Add Contribution' button is highlighted in a red box. At the bottom of the page, there is a dark grey bar with the text 'Add Contribution' and a question mark icon.

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 C	Completed		✓
<input 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 type="checkbox"/> February 28th, 2023 06:30 PM	Nicole Lam	\$250.00	General Fund		DMS Manual	Cheque	Completed	WELL00000912	✓
<input type="checkbox"/> February 28th, 2023 03:40 PM	Lucas Froese	\$50.00	General Fund		DMS Manual	Cheque	Completed	WELL00000911	✓

3. Fill out all mandatory and necessary fields on the New Contribution page:

## Main Fields:

- **Contributor:** the Contact making this donation.
  - You can further narrow your search based on specific criteria.

← Contributions Online Payment Contribution

## New Contribution

Save Save And New Cancel

CONTRIBUTOR \*

- select Contact -

Start typing a name or email...

Refine search... ▼

New Individual

New Organization

Enter amount

02:32PM

The date this contribution was received.

FUND \*

Add Contribution - Refine Search

- **Payment Method:** the payment method used to make this donation.
- **Transaction ID:** an additional external ID in addition to the automatic one created in the DMS (e.g. ID from an external payment processor).
- **Total Amount:** the total monetary amount for this donation.
- **Data Received:** the date this donation was received.
- **Fund:** the Fund this donation is going into.
- **Campaign:** the Campaign associated with this donation.
- **Source:** which source the donation is coming from (e.g. Historical Data Import). You can also add a new Source by selecting **+Add New Source** on the right.
  - When adding an offline Contribution, the default Source will be **DMS Manual**.
  - Contributions coming from CanadaHelps.org will have a default source of **CanadaHelps**.

#### Contribution Details:

- **Exclude From Tax Receipting:** Select Yes if a Tax Receipt for this Contribution has already been issued externally, or if it is not eligible for Receipting. Otherwise, you can either select No or leave the question blank.
- **External Receipt Number:** if the Contribution has been receipted externally, add the external receipt number.

- **Contribution Note:** optional note for the whole Contribution.
- **Mark Contribution as Recurring:** indicates if the donation is recurring. If it is, you still have to manually process the subsequent Contributions.

#### Dedication Information:

- **In Memory Of:** if the donation is in memory of something and/or someone.
- **In Honour Of:** if the donation is in honour of something and/or someone.
- **Name of Honoree:** the name of the honoree associated with this dedication.
- **Message:** optional message associated with the dedication.

#### Additional Details:

- **Advantage Amount:** the total monetary amount of the Advantage.
- **Advantage Description:** optional description for this Advantage (75 character limit).
- **Fee Amount:** external fee in addition to any CH fees (e.g. a fee from an external payment processor)
- **Thank-you Date:** the date and time that this donation has been thanked. The Contribution will be marked as **Thanked**.

4. Select **In Kind** as the **Payment Method**. The **Fund** will be automatically set as **In Kind**.

5. A new **In Kind donation fields** section will show up with the following fields:

DMS Payments Contribution

**New Contribution** Save Save and New Cancel

CONTRIBUTOR \*  
-select Contact-

PAYMENT METHOD \*  
In Kind

TRANSACTION ID  
Enter transaction ID

TOTAL AMOUNT \*  
CAD (\$) \$ Enter amount

DATE RECEIVED \*  
07/27/2022 08:57AM  
The date this contribution was received.

FUND \*  
In Kind

CAMPAIGN  
-select-

SOURCE + Add New Source  
DMS Manual

CONTRIBUTION STATUS  
Completed

^ In Kind donation fields

DESCRIPTION OF PROPERTY \*

APPRAISED BY \*

ADDRESS OF APPRAISER \*

ORIGINAL COST

^ Contribution Details

^ Dedication Information

^ Additional Details

Save Save and New Cancel

*In Kind Donation Fields*

- **Description of Property:** the description of the received Property (75 character limit).
- **Appraised By:** who appraised this In Kind donation.
- **Address of Appraiser:** the full address of the Appraiser (55 character limit).
- **Original Cost:** the original cost of the received Property (55 character limit).

6. After filling out all necessary fields, Select **Save** to add the new Contribution.

## Issuing In Kind Receipts

After adding a Contribution with In Kind fields, you can then issue an In Kind Tax Receipt for it.

### Single In Kind Receipts

1. Go to the **Contributions Tab**
2. Search for the specific in-kind Contribution you wish to issue a Tax Receipt for

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 1452 Records

All Contributions Advanced Actions Add Contribution

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 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	Fundraising for peace		Cheque	Completed	-

Search for the specific Contribution

### 3. Select the specific Contribution Amount

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 1476 Records

All Contributions Advanced Actions Add Contribution

Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
<input type="checkbox"/>	March 6th, 2023 02:38 PM	Kat James	\$40.00	General Fund	Fundraising for peace	DMS Manual	Cash	Completed	WELL00000932 ✓
<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 Donation Form	DMS Manual	Cheque	Completed	WELL00000929 ✓
<input type="checkbox"/>	March 6th, 2023 11:53 AM	Alex Fergie	\$100.00	General Fund		DMS Manual	Cheque	Completed	-
<input type="checkbox"/>	March 6th, 2023 11:50 AM	Jacob O'Connor	\$75.00	Mental Health Initiative		DMS Manual	Cheque	Completed	WELL00000930 ✓
<input type="checkbox"/>	March 6th, 2023 11:34 AM	Lucas Froese	\$1,000.00	General Fund	Golf Tournament	DMS Manual	Cheque	Completed	WELL00000928 ✓
<input type="checkbox"/>	March 6th, 2023 09:16 AM	Mullin Margo	\$300.00	In Kind		DMS Manual	In Kind	Completed	-
<input type="checkbox"/>	March 6th, 2023 02:26 AM	Maya Karolina	\$1.23 (Recurring)	Fitness		DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed	-

Select Contribution Amount

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

Wellness Avenue

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

Settings | Help

DMSCA DMSCA

### Contributions from Margo Mullin

Edit Issue Tax Receipt Cancel

Contribution Details

From	Margo Mullin
Fund	In Kind
Total Amount	\$300.00
Net Amount	\$300.00
Fee Amount	\$0.00
Advantage Amount	\$0.00
Description of advantage	-
Received	Mar 6th, 2023 9:16 AM

Issue Tax Receipt

5. Select **Preview** to see a preview of the Receipt before actually issuing it

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 and either:

- **Mark Contribution as thanked:**
  - If you thank your donors separately
  - 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 as thanked

- **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 **via email**
- 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

Default Message

Delivery Method

Method Email ⓘ

Back Preview Issue Tax Receipt

?

Send a custom thank-you

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).



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

- Email
- Print

Method

Email

Back Preview Issue Tax Receipt

Choose delivery method

8. Then, select **Issue Tax Receipt**. The in-kind Tax Receipt will then be **downloaded and/or sent** to the Contact's registered email address:

WELLNESS AVENUE FOUNDATION  
186 Spadina Avenue  
Toronto



John Raisin  
186 Spadina Ave  
Toronto, ON  
M1M 1M1, Canada

Dear John Raisin,

Thank you for giving generously. Your support is critical to helping us fulfill our mission.

To assist with your record keeping, please find your official tax receipt. If you have questions about your contribution, please email [tuckey@canadahelps.org](mailto:tuckey@canadahelps.org) or call 416-628-6948.

Thank you,  
Wellness

Official Tax Receipt For Income Tax Purposes

WELLNESS AVENUE FOUNDATION  
Charitable Registration #: 10000-000-RR0000  
186 Spadina Avenue  
Toronto



Receipt #: WAF00000566  
Receipt Issued: 2021-12-17  
Location Issued: boop2, Ontario  
Donation Received: 2021-12-17  
Donation Amount: \$2,000.00  
Eligible Amount of Gift: \$2,000.00

Donated by:  
John Raisin  
186 Spadina Ave  
Toronto, ON  
M1M 1M1, Canada

Description of Property Received: Computer equipment  
Fair Market Value Appraised by: Appraiser  
Address of Appraiser: 123 Pretend St Toronto ON

Authorized Signature

## Multiple In Kind Receipts

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

Actions	Date	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
<input checked="" type="checkbox"/>	October 13th, 2021 03:10 PM	▲ LeMesurier, Anne	\$ 100.00	Wellness Fund	Wellness Workshop	DMS Manual	Cash	Completed	-	-
<input checked="" type="checkbox"/>	October 13th, 2021 03:09 PM	▲ Jones, Fred	\$ 300.00	Mental Health	Great Canadian Giving Challenge Donation Form	DMS Manual	Cash	Completed	-	-
<input type="checkbox"/>	October 13th, 2021 02:24 PM	▲ Love, Bernadette	\$ 10.00	General Fund		DMS Manual	Cash	Completed	WELL00000005	✓
<input type="checkbox"/>	October 12th, 2021 10:13 AM	▲ Farley, Elize	\$ 100.00	Fitness	Wellness Challenge	DMS Manual	Cash	Completed	WELL00000002	✓
<input type="checkbox"/>	October 6th, 2021 01:48 PM	▲ Love, Bernadette	\$ 100.00	Fitness	Wellness Challenge	DMS Manual	Cash	Completed	CRM00000001	✓
<input checked="" type="checkbox"/>	October 5th, 2021 01:09 PM	▲ Farley, Elize	\$ 250.00	In Kind	Wellness Ave.	DMS Manual	In Kind	Completed	-	-
<input type="checkbox"/>	October 1st, 2021 09:57 AM	▲ Love, Bernadette	\$ 125.00	General Fund	Wellness Ave. General	CanadaHelps	CH - Credit Card	Completed	-	-

3 Ways to Select Contributions

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

#### 4. Select either

- **Issue Tax Receipts (Combined Receipts with Total Contributed),** or
- **Issue Tax Receipts (Separate Receipt for Each Contribution)**

The screenshot shows the 'Contributions' page in the Wellness Avenue system. A table lists several contributions with columns for Name, Amount, Fund, Campaign, Source, Method, Status, Receipt No., and Thanked. An 'Actions' dropdown menu is open, showing two options: 'Issue Tax Receipts (Combined Receipt with Total Contributed)' and 'Issue Tax Receipts (Separate Receipt for Each Contribution)'. The first option is highlighted with a red box.

Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
LeMesurier, Anne	\$ 100.00	Wellness Fund	Wellness Workshop	DMS Manual	Cash	Completed		-
Jones, Fred	\$ 300.00	Mental Health	Great Canadian Giving Challenge Donation Form	DMS Manual	Cash	Completed		-
Love, Bernadette	\$ 10.00	General Fund		DMS Manual	Cash	Completed	WELL00000005	✓
Farley, Elize	\$ 100.00	Fitness	Wellness Challenge	DMS Manual	Cash	Completed	WELL00000002	✓
Love, Bernadette	\$ 100.00	Fitness	Wellness Challenge	DMS Manual	Cash	Completed	CRM00000001	✓
Farley, Elize	\$ 250.00	In Kind	Wellness Ave.	DMS Manual	In Kind	Completed		-

*Options to Issue Tax Receipts*

#### 5. You will then be directed to the specific Receipting Page (depending on which option you selected)

#### Issuing Combined Receipts with Total Contributed

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:

The screenshot shows the 'Receipts Details' page. It includes sections for 'Tax Year' (2022), 'Thank You Settings' (with 'Mark Contribution as thanked' checked), 'Table of Users' (listing received contributions), and 'Delivery Method' (set to 'Email').

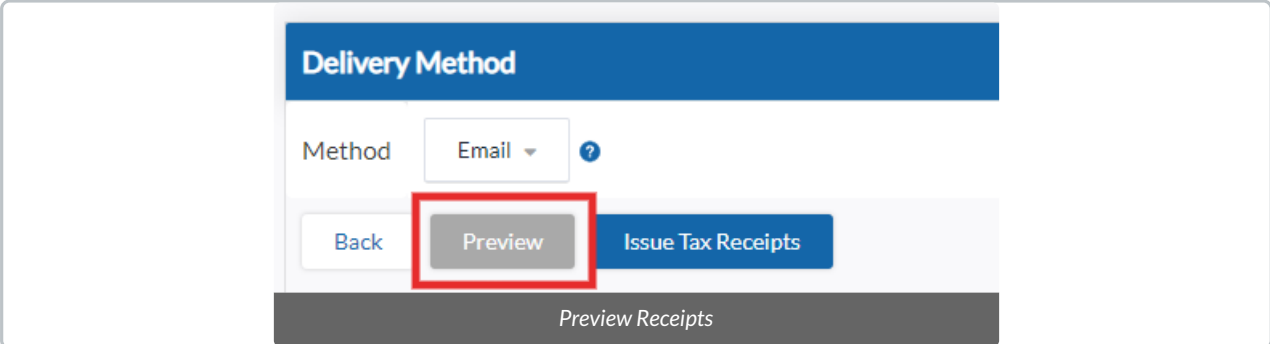
Received	Name	Amount	Fund	Campaign	Source	Method	Status	Eligibility
July 26th, 2022 02:21 PM	Timara Rahmani	\$ 500.00	In Kind		DMS Manual	In Kind	Completed	Eligible
July 26th, 2022 03:07 PM	Benjamin Franklin	\$ 1850.00	In Kind	Fundraising for peace	DMS Manual	In Kind	Completed	Eligible

*Issue Tax Receipt Options*

- **How many Contributions were selected, how many Contributions are eligible for receipting, 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-issue Tax Receipts for Contributions that have already been receipted

- **Preview:** preview how your finalized Tax Receipt(s) will look like.

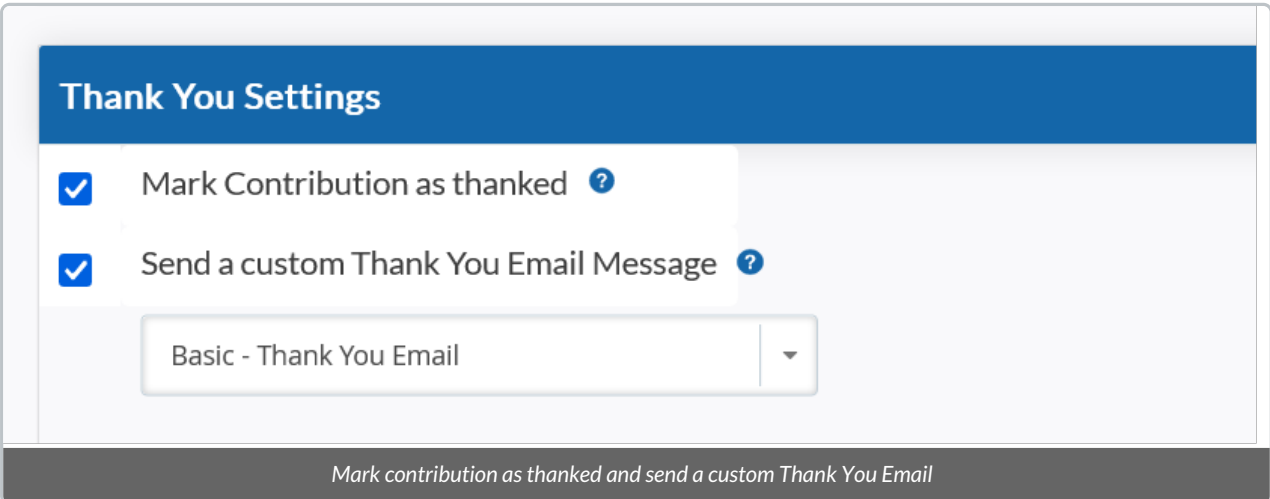
2. Select **Preview** to see a preview of the Receipts before issuing them



The screenshot shows a 'Delivery Method' form. At the top is a blue header with the text 'Delivery Method'. Below the header, there is a 'Method' dropdown menu currently set to 'Email'. To the right of the dropdown is a small blue question mark icon. Below the dropdown are three buttons: 'Back', 'Preview', and 'Issue Tax Receipts'. The 'Preview' button is highlighted with a red rectangular box. At the bottom of the form is a dark grey bar with the text 'Preview Receipts'.

3. 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
  - These Contributions will be [marked as thanked and receipted in your DMS](#)
- **Send a custom Thank You Email Message**
  - Thank your Contacts via email for their Contributions along with their Tax Receipt using the DMS
  - Select custom Thank you [Message Templates](#) to be sent with the tax receipt **via email**
  - These Contributions will be [marked as thanked and receipted in your DMS](#)

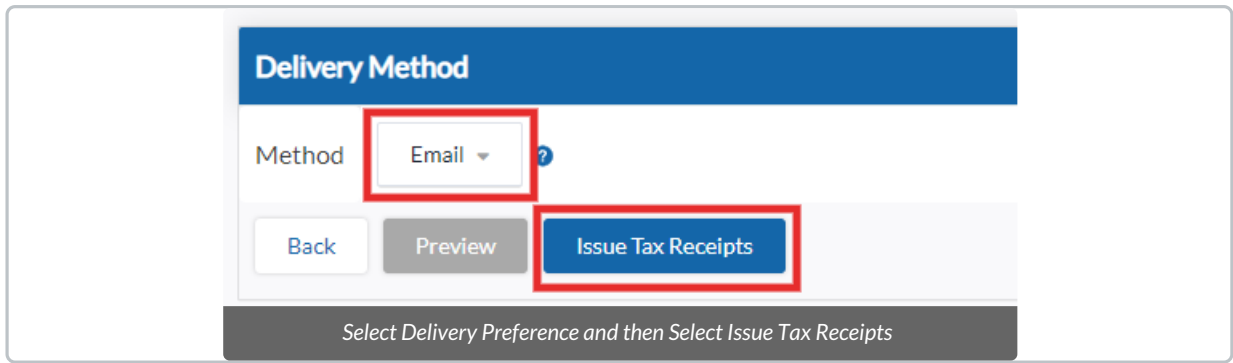


The screenshot shows a 'Thank You Settings' form. At the top is a blue header with the text 'Thank You Settings'. Below the header, there are two settings, each with a checked checkbox and a blue question mark icon: 'Mark Contribution as thanked' and 'Send a custom Thank You Email Message'. Below these settings is a dropdown menu with the text 'Basic - Thank You Email'. At the bottom of the form is a dark grey bar with the text 'Mark contribution as thanked and send a custom Thank You Email'.

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).

5. Then, select **Issue Tax Receipts**



6. The Tax Receipt(s) will then be **downloaded or sent** to the Contacts' registered email address.

## Issuing Separate Receipts for Each Contribution

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

**Receipts Details**

Tax Year	2022	Contributions	2
Eligible Contacts	2	Eligible Contributions	2
Total Eligible Amount	\$ 2,350.00	Ineligible Contributions	0

**Thank You Settings**

Mark Contribution as thanked

Send a custom Thank You Email Message

**Table of Users**

Received	Name	Amount	Fund	Campaign	Source	Method	Status	Eligibility
July 26th, 2022 02:21 PM	Tamara Rahmani	\$ 500.00	In Kind		DMS Manual	In Kind	Completed	Eligible
July 26th, 2022 03:07 PM	Benjamin Franklin	\$ 1850.00	In Kind	Fundraising for peace	DMS Manual	In Kind	Completed	Eligible

**Delivery Method**

Method: Email

Buttons: Back, Preview, Issue Tax Receipts

*Review Receipting Options*

- **How many Contributions were selected, how many Contributions are eligible for receipting, and total eligible amount.**
- **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-issue Tax Receipts for Contributions that have already been receipted
- **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

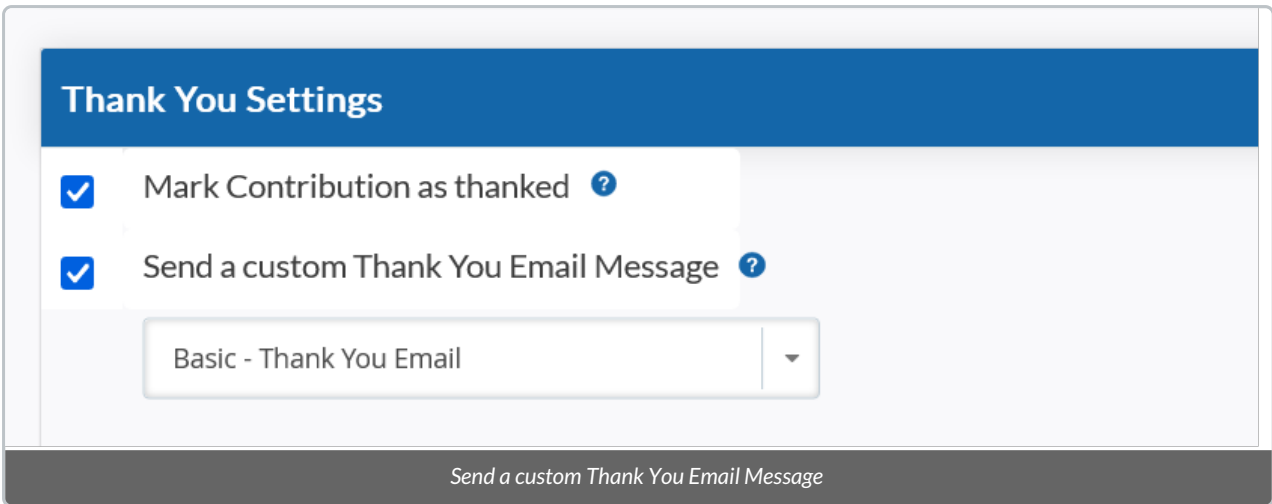
**Note:** When previewing multiple Separate Tax Receipts, the Tax Receipt Numbers on each individual receipt will show up as the same. The numbers will be unique once you issue the Separate Tax Receipts.

3. If you has selected contributions that have already been receipted in the DMS and would like to re-issue these receipts, select **Also re-issue duplicates**.

4. **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 receipted in your DMS](#)

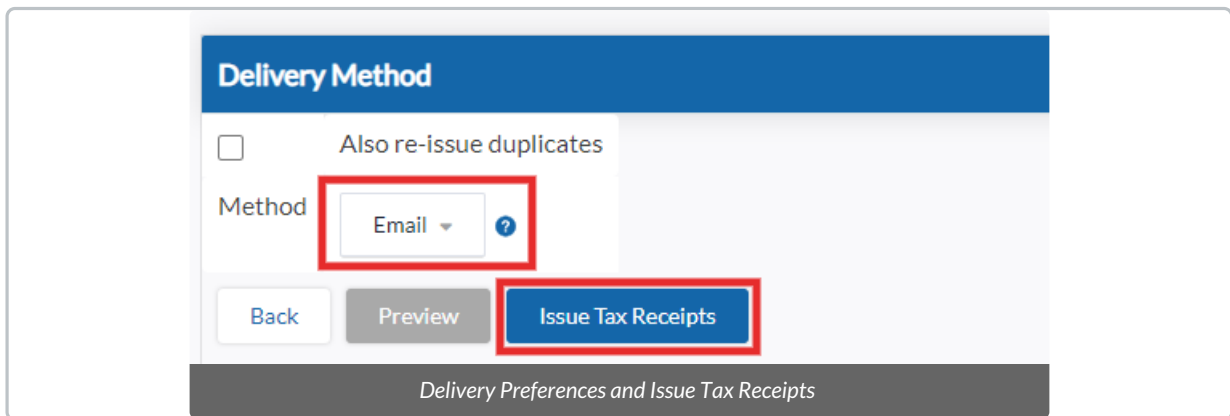
- **Send a custom Thank You Email Message**
  - Thank your Contacts via email for their Contribution along with their Tax Receipt using the DMS
  - Select custom Thank you [Message Templates](#) to be sent with the tax receipt **via email**
  - This Contribution will be [marked as thanked and receipted in your DMS](#)



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).

5. Then, select **Issue Tax Receipts**



6. The Tax Receipt(s) will then be **downloaded or sent** to the Contacts' registered email address.