

Voiding a Single Tax Receipt

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Donor Management System

Sometimes, after [issuing a Tax Receipt](#), you may find for various reasons that you need to void the receipt. The DMS allows you to easily void a tax receipt with the click of a button.

But to **fully void your Tax Receipt** (and avoid double-counting the corresponding Contribution in your reports), you'll need to:

1. Void the Tax Receipt, and
2. Change the Contribution's *Contribution Status* to 'Cancelled'

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Step 1: Voiding a Single Tax Receipt

Note: for security reasons, the DMS will only allow you to void a single Tax Receipt at a time.

1. Visit the **Contributions Tab**
2. **Search for the Contribution** you whose Tax Receipt you'd like to void

Wellness AvenuePlus

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

Settings | Help
John Bonjovi

Search by contributor name or email

Actions | Selected Records Only | All 1826 Records

Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
July 14th, 2023 09:16 AM	Nicole Lam	\$5,000.00	General Fund		DMS Manual	Cheque	Cancelled		✓
July 13th, 2023 07:16 PM	Benjamin Franklin	\$5.00 (Recurring)	Fitness		DMS Payments Credit Card Contribution (Recurring)	Credit Card C	Pending (Incomplete Transaction)		-
July 13th, 2023 12:13 AM	Andy Monthly	\$30.00 (Recurring)	Mental Health Initiative	Andy Test Form	CanadaHelps	CH - Credit Card C	Completed		-
July 12th, 2023 09:00 AM	Krista Stewart	\$120.00	Gift Box	Bottle Drive	DMS Manual	Cheque	Completed		✓
July 12th, 2023 09:00 AM	Krista Stewart	\$1,000.00	Gift Box	Bottle Drive		Cash	Completed		✓
July 12th, 2023 09:00 AM	Nicole Lam	\$50.00	Gift Box	Bottle Drive		Cash	Completed		-
July 12th, 2023 09:00 AM	Arnold Schwarzenegger	\$150.00	Gift Box	Bottle Drive		Cash	Completed	WELL00001189	✓
July 12th, 2023 09:00 AM	Pepper Stewart	\$250.00	Gift Box	Bottle Drive		Cheque	Completed	WELL00001192	✓
July 12th, 2023 09:00 AM	Krista Stewart	\$150.00	Gift Box	Bottle Drive		Credit Card	Completed	WELL00001191	✓

Search for the specific received Contribution

3. Click on Contribution's Amount

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

Settings | Help
John Bonjovi

Arnold Schwarzenegger

Actions | Selected Records Only | All 8 Records

Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
July 12th, 2023 09:00 AM	Arnold Schwarzenegger	\$150.00	Gift Box	Bottle Drive		Cash	Completed	WELL00001189	✓
June 21st, 2023 11:28 AM	Arnold Schwarzenegger	\$2,000.00	Text Fund		DMS Manual	Cash	Completed	WELL00001124	✓
September 19th, 2022 07:42 PM	Arnold Schwarzenegger	\$400.00	General Fund		DMS Manual	Cheque	Completed	WELL00000363	✓
September 19th, 2022 06:59 PM	Arnold Schwarzenegger	\$100.00	General Fund		DMS Manual	Cheque	Completed	WELL00000362	✓
September 19th, 2022 06:45 PM	Arnold Schwarzenegger	\$200.00	General Fund		DMS Manual	Cheque	Completed	WELL00000361	✓
September 20th, 2021 04:48 PM	Arnold Schwarzenegger	\$500.00	General Fund		DMS Manual	Cheque	Completed	WELL00000356	✓

Contribution Amount

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

Contributions from Arnold Schwarzenegger

Settings | Help
John Bonjovi

Go Back | **Manage Receipt** | Cancel

Contribution Details

From	Arnold Schwarzenegger
Fund	Gift Box
Total Amount	\$150.00
Net Amount	\$150.00
Fee Amount	\$0.00
Advantage Amount	\$0.00

Manage Receipt

5. On the next screen, you'll see more details about the received Contribution

Tax Receipt

Receipt Details

Receipt No.	WELL00001199	Issue Date	Jul 12th, 2023 9:57 AM
Receipt Status	Issued	Issued By	welnessave@canadahelps.ca (74)
Type	Single	Method	Print
Amount	\$150.00	Email Opened	

Thank You Settings

Mark Contribution as thanked

Send a custom Thank You Message

Delivery Method

Method: Print

Back Print Duplicate Tax Receipt Void Receipt

Additional information about the already received Contribution

6. Select **Void Tax Receipt** on the bottom-right. Note: your Contact won't be notified even if *Email* had previously been selected.

Tax Receipt

Receipt Details

Receipt No.	WELL00001199	Issue Date	Jul 12th, 2023 9:57 AM
Receipt Status	Issued	Issued By	welnessave@canadahelps.ca (74)
Type	Single	Method	Print
Amount	\$150.00	Email Opened	

Thank You Settings

Mark Contribution as thanked

Send a custom Thank You Message

Delivery Method

Method: Print

Back Print Duplicate Tax Receipt Void Receipt

Void Tax Receipt

7. You can then download a copy of the Voided Tax Receipt by selecting **Print as the Delivery Method** and then **Print Duplicate Tax Receipt**.

Tax Receipt

Receipt Details

Receipt No.	WELL00001199	Issue Date	Jul 12th, 2023 9:57 AM
Receipt Status	Cancelled	Issued By	welnessave@canadahelps.ca (74)
Type	Single	Method	Print
Amount	\$150.00	Email Opened	

Thank You Settings

Mark Contribution as thanked

Send a custom Thank You Message

Delivery Method

Method: Print

Back Previous Print Duplicate Tax Receipt Restore Receipt

Receipt Status will change to 'Cancelled'

8. The tax receipt when viewed will now display a 'CANCELLED' watermark.



Step 2: Changing the Contribution Status to Cancelled

After voiding the Tax Receipt, you'll need change the corresponding Contribution's *Contribution Status* to 'Cancelled' to avoid double-counting this Contribution in your DMS reports.

1. Visit the **Contributions Tab** and search for the Contribution you wish to modify
2. Select the Contribution's **Amount** to see its Details

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Arnold Schwarzenegger

Settings | Help
John Borjovi

Advanced Search

Actions Selected Records Only All Records

All Contributions Advanced Actions Add Contribution

Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
<input type="checkbox"/> July 12th, 2023 09:00 AM	Arnold Schwarzenegger	\$150.00	Gift Box	Bottle Drive		Cash	Completed	WELL00001189	<input checked="" type="checkbox"/>
<input type="checkbox"/> June 21st, 2023 11:28 AM	Arnold Schwarzenegger	\$2,000.00	Test Fund		DMS Manual	Cash	Completed	WELL00001124	<input checked="" type="checkbox"/>
<input type="checkbox"/> September 19th, 2022 07:42 PM	Arnold Schwarzenegger	\$400.00	General Fund		DMS Manual	Cheque	Completed	WELL00000363	<input checked="" type="checkbox"/>
<input type="checkbox"/> September 19th, 2022 06:59 PM	Arnold Schwarzenegger	\$100.00	General Fund		DMS Manual	Cheque	Completed	WELL00000362	<input checked="" type="checkbox"/>
<input type="checkbox"/> September 19th, 2022 06:45 PM	Arnold Schwarzenegger	\$200.00	General Fund		DMS Manual	Cheque	Completed	WELL00000361	<input checked="" type="checkbox"/>
<input type="checkbox"/> September 20th, 2021 04:48 PM	Arnold Schwarzenegger	\$500.00	General Fund		DMS Manual	Cheque	Completed	WELL00000356	<input checked="" type="checkbox"/>

Select Contribution Amount

3. On the Contribution Details page, select **Edit** on the top right corner of the screen

Contributions from Arnold Schwarzenegger

Contribution Details	
From	Arnold Schwarzenegger
Fund	Gift Box
Total Amount	\$150.00
Net Amount	\$150.00
Fee Amount	\$ 0.00
Advantage Amount	\$0.00

Edit Contribution

4. Under **Contribution Status**, change the status from Completed to **Cancelled** and **Save**.

CONTRIBUTOR
Arnold Schwarzenegger

TOTAL AMOUNT *

CAD (\$) 150.00

DATE RECEIVED *

07/12/2023 09:00AM
The date this contribution was received.

FUND *
Gift Box

CH FUND
-select CH Fund-

CAMPAIGN
Bottle Drive

SOURCE + Add New Source
DMS Manual

CONTRIBUTION STATUS

Completed
 Completed
Cancelled
 Refunded
 Chargeback
 Scheduled

Date that a receipt was sent to the contributor.

Payment Method	Transaction ID	Status
Cash		Completed

Update Contribution Status

What's Next?

Now that you've voided the incorrect tax receipt and cancelled the incorrect Contribution, learn how to [issue a corrected receipt](#).

