

Previewing Tax Receipts

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Donor Management System

Once you've finished configuring your [Tax Receipt settings](#), [thank-you note](#), and [thank-you email message](#), you're ready to start issuing tax receipts. But, if you prefer to see a quick preview of your tax receipts to see what donors will be receiving, you can use the **DMS' preview function**.

Reminder: In order to generate and issue your Tax Receipts to your donors, you must have a [From Email Address](#) configured by the CanadaHelps team.

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Why Should I Preview my Tax Receipts?

We definitely recommend that you preview a tax receipt prior to issuing your first tax receipt, in order to:

1. Confirm that your charity information, charity logo, and authorized signature images have been [added to your receipts](#) and look the way you want them to.
2. Ensure that your [Tax Receipt thank you note](#) is representative of your charity.

Previewing your Tax Receipts

1. Start by manually recording a test [offline contribution](#) in your DMS. This fake contribution will allow you to generate a preview of your Tax Receipt.

Note: If you are adding a fake Contribution to test, please ensure that you *preview* the receipt only.

2. After recording your test contribution, visit your **Contributions Tab**

3. Search for your newly-added Contribution:

The screenshot shows the 'Contributions' page in the Wellness Avenue system. At the top, there is a navigation bar with 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. A search bar is highlighted with a red box, containing the text 'Search by contributor name or email'. Below the search bar, there are filters for 'Actions', '0 Selected Records Only', and 'All 1452 Records'. A table lists several contribution records with columns for 'Received', 'Name', 'Amount', 'Fund', 'Campaign', 'Source', 'Method', 'Status', 'Receipt No.', and 'Thanked'. The records include contributions from A. L. Kostenko, Lucas Froese, Benjamin Franklin, Nicole Lam, and Munoz Jordan. A dark grey bar at the bottom of the screenshot contains the text 'Contribution Search'.

4. Select Contribution Amount of the unreceipted Contribution

This screenshot shows the 'Contributions' page with a search bar and a table of records. The 'Amount' column for the first record, 'March 6th, 2023 02:38 PM' by Kat James, is highlighted with a red box and contains the value '\$40.00'. The 'Receipt No.' column for the same record is also highlighted with a red box. The table includes columns for 'Received', 'Name', 'Amount', 'Fund', 'Campaign', 'Source', 'Method', 'Status', 'Receipt No.', and 'Thanked'. Other records are listed below, including one from Rahmani Tamara and another from Lucas Froese. A dark grey bar at the bottom of the screenshot contains the text 'Select the Contribution amount'.

5. On the next page, select Issue Tax Receipt at the top right

Reminder: 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.

Wellness Avenue

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

Settings | Help

DMSCA DMSCA

Contributions from Kat James

Edit Issue Tax Receipt Cancel

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

Select Issue Tax Receipt

6. Select **Preview** to view a preview of the Receipt before actually issuing it. The preview will be displayed as a PDF document.

Note: Your previewed tax receipt will show a PREVIEW watermark across 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

7. If you decided to record a **fake contribution** in your DMS for previewing purposes, you can [follow the steps to](#)

delete it.

What's Next?

If you're happy with the way your DMS tax receipts are configured, you're ready to start [Issuing your Tax Receipts!](#) Otherwise, check out how to make any changes to your [Tax Receipt Configurations](#) as needed.