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.

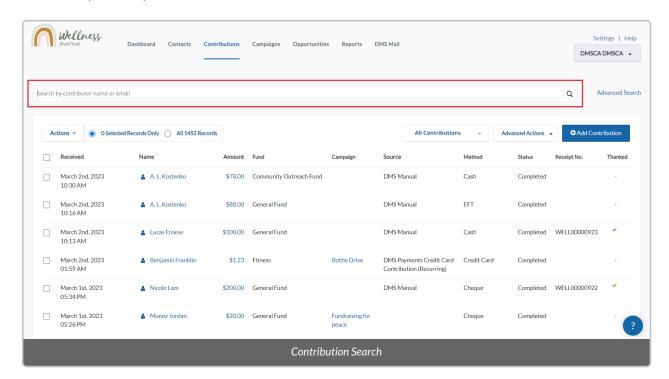
Previewing your Tax Receipts

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.

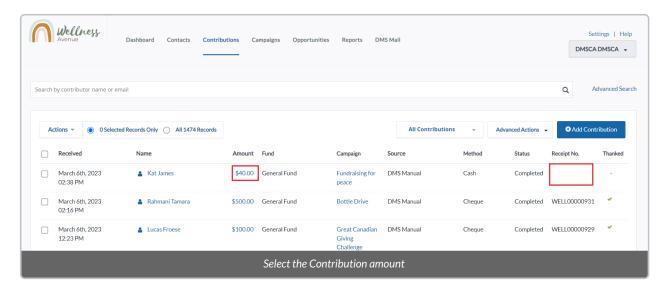
Note: If you are adding a fake Contribution to test, please ensure that you preview the receipt only.

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

3. Search for your newly-added Contribution:

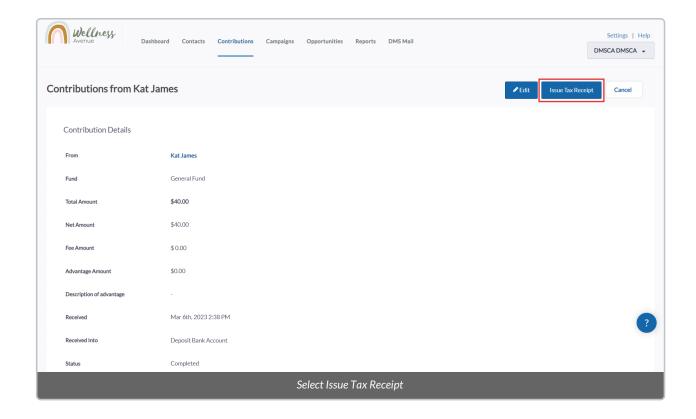


4. Select *Contribution Amount* of the unreceipted Contribution

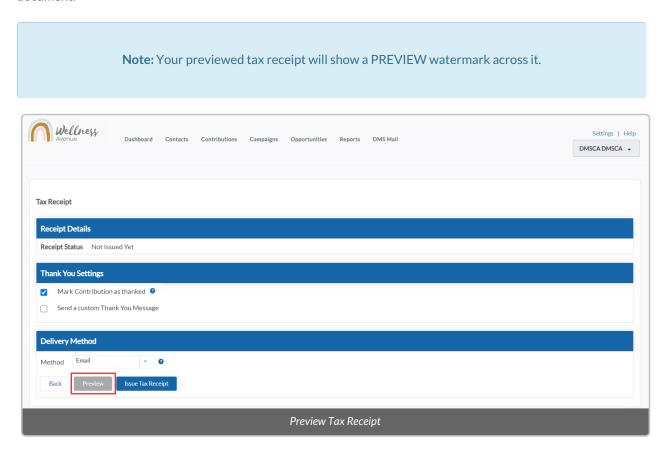


5. On the next page, select Issue Tax Receipt at the top right

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.



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



7. If you decided to record a fake contribution in your DMS for previewing purposes, you can follow the steps to

What's Next?

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