Tax Receipting Webinar

Donor Management System

Tax Receipting

This session looks at configuring your DMS Tax Receipts, as well as common tax receipting scenarios, including issuing, re-issuing, and cancelling your tax receipts.

Experience: *Intermediate*
Duration: *25 minutes*
Pre-requisites: *Getting Started*

 Watch Recording (English)

Agenda:

1. Introduction to Tax Receipting in the DMS
2. Configuring your Tax Receipts
3. Modifying your Tax Receipt Thank-You Note
4. Modifying your Tax Receipt Email
5. Issuing a Single Tax Receipt
6. Issuing Multiple Tax Receipts
7. Issuing Yearly Tax Receipts
8. Re-Issuing a Tax Receipt
9. Voiding and Issuing a Corrected Tax Receipt
10. Marking a Contribution as Ineligible for Receipting