

[Donor Management System] July 27, 2022

Last Modified on 07/27/2022 1:57 pm EDT

What's New

1. Advanced Search: Tax Receipt Sent

- For consistency, we've removed the "Tax receipt sent" field from the [Advanced Search for Contributions](#). Going forward, you can use the **"Contribution receipted"** filter instead to view any contributions (DMS, Historic or CanadaHelps) where the "receipt number" field **contains a receipt number**, as well as any contributions that you have **actively marked as 'receipted'**.

The screenshot shows the 'Advanced Search for Contributions' interface. The 'CONTRIBUTION RECEIPTED' filter is highlighted with a green box. The filter dropdown shows 'Any', 'Yes', and 'No' options. Other filters visible include 'THANK YOU SENT', 'PREFERRED COMMUNICATION METHOD', 'CH FUND', 'EXCLUDE FROM TAX RECEIPTING', 'FEES COVERED', 'RECEIPT NUMBER', and 'CONTRIBUTION NOTE'.

2. Receipt Settings: Language Change

- To avoid confusion, we've updated the language of the **"Delivery Preference"** label on the [Tax Receipt landing page](#) to **"Delivery Method"**.

The screenshot shows the 'Receipt Settings' interface. The 'Delivery Method' label is highlighted with a green box. The 'Delivery Method' dropdown is set to 'Email'. The 'Receipt Status' is 'Not Issued Yet'. The 'Thank You Settings' section has 'Mark Contribution as thanked' checked and 'Send a custom Thank You Email' unchecked. The 'Method' dropdown is also set to 'Email'. Buttons for 'Back', 'Preview', and 'Issue Tax Receipt' are visible at the bottom.

3. In Kind Contribution Improvement

- Previously, some of the fields associated with an [In Kind Contribution](#) were optional. To help with your reporting, and to ensure continued compliance with CRA tax receipting guidelines, the **'Description of**

Property' field is now mandatory, and will appear every time you choose your DMS' defaulted 'In kind' fund.

Payment Method	Transaction ID	Status
In Kind		Completed
^ In Kind donation fields		
DESCRIPTION OF PROPERTY *		
<input type="text"/>		
APPRAISED BY *		
<input type="text"/>		
ADDRESS OF APPRAISER *		
<input type="text"/>		
ORIGINAL COST		
<input type="text"/>		