Configure Your Tax Receipt Settings

Last Modified on 05/28/2025 9:45 am EDT

To issue tax receipts through Charity OS, you'll need to enter your organization's details to meet The Canada Revenue Agency (CRA) requirements.

These settings are essential to ensure your tax receipts are compliant, so please take a moment to read through the steps carefully before getting started.
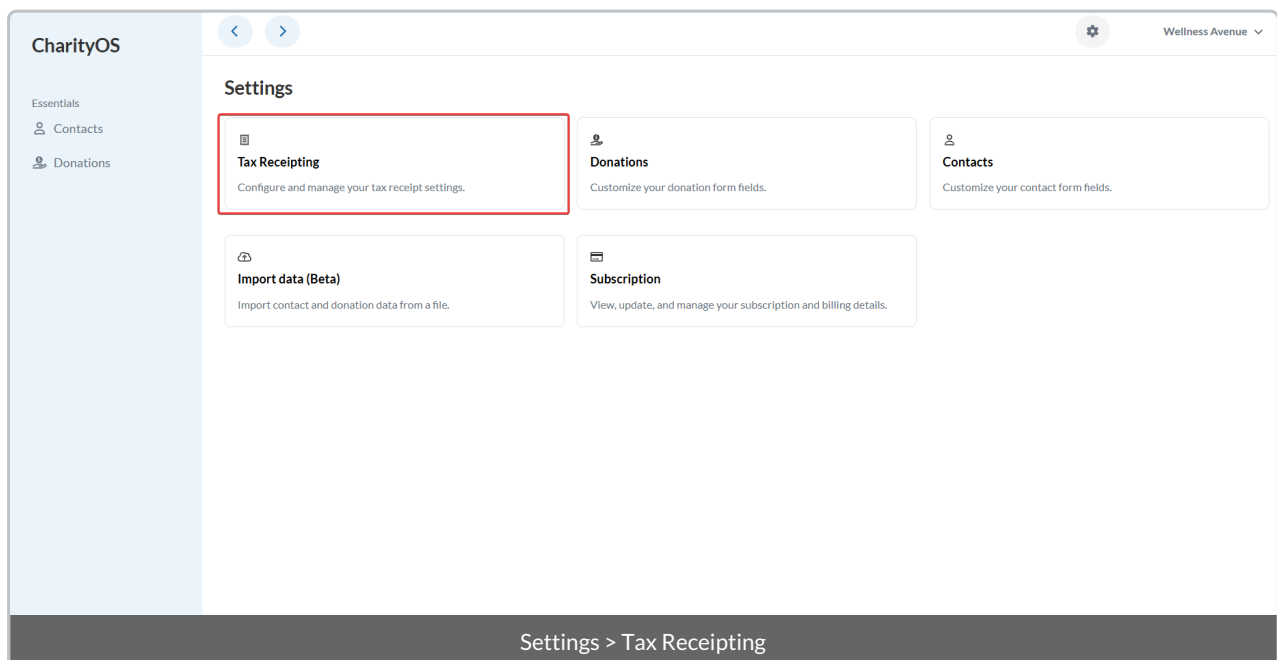
Configuring your Tax Receipt Settings

1. To access **Settings**, click on the gear icon in the top-right corner of your account.

2. Select Tax Receipting.

Settings > Tax Receipting

3. On the next page, please fill out the necessary information:

Tax receipt details

- **Authorized signature name:** This name will appear under the signature on the tax receipt.

- **Receipt prefix:** Prefixes can include numbers, letters or combine both. Maximum 5 characters.
- **Receipt starting number:** The number cannot be changed once your first receipt has been issued unless the prefix is changed.
- **Archive email:** This organizational email address will receive a copy of each tax receipt whenever one is issued, for record-keeping purposes (and as required by the CRA). You can update this email address at any time on this page.
- **Location issued:** Enter the the City, Town or Municipality of where your receipts are issued or that of your charity's operational base. It ensures compliance with tax regulations by confirming the receipt's origin.

Tax receipt details   Cancel   **Save**

Authorized signature name *

| Enter the name of the person authorized to sign tax receipts |

Receipt prefix ⓘ   Receipt starting number ⓘ

| e.g., TCR | | 1 |

Max. 5 characters

Archive email ⓘ *

| |

Location issued *

| Enter the city or town where your receipts are issued, e.g. Toronto |

Organization logo

- Upload an image of your organization's logo.

Organization logo   Upload logo

You haven't added your logo yet. Click here to add your logo.

Authorized signature

- Upload an image of your organization authorized signer's signature.

Authorized signature   Add signature

You haven't added your authorized signature yet. Click here to add an authorized signature.

Charity details

- Organization details such as address are synced directly from your CanadaHelps account. To make any changes, click on **Edit charity details** to be redirected to the *Account Settings* page in your CanadaHelps account.

Charity details　　[Edit charity details]

Charity name	Wellness Avenue
Charity registration number	temp-20210616135838
Website	
Charity email	info@wellnessavenue.ca

Charity address

186 Spadina Avenue, Units 1-5
Toronto ON M5T3B2
CA

What's Next?

Now that you've configured your basic tax receipt settings, learn how to update the default Tax Receipt PDF Thank You Note, and modify the Tax Receipt Email Messages in Charity OS!