Customize the Default Tax Receipt Emails

Last Modified on 05/28/2025 10:28 am EDT

When issuing or re-issuing tax receipts via email, the email will include a customizable message, along with the donor's tax receipt as an attachment. Here's how the tax receipt email appears.

The areas that can be customized are highlighted for your reference:

	our support! This is individual receipt email. ${}^{\Sigma}$	
CanadaHelps notification	ons@canadahelps.org>	📼 3:13 PM (5 minutes ago) 🛛 🛧
	rously. Your support is critical to helping us fulfill our mission. To assist with your record tate to reach out to us. This is individual receipt email. Thanks	keeping, please find your official tax receipt. If you have questions
One ettechment . Co	anned by Gmail 🛈	
One attachment • Sci		
PDF		

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Customize the Default Tax Receipt Emails

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

CharityOS	< >		🗘 Wellness Avenue 🗸
Essentials	Settings		
을 Contacts 오 Donations	Tax Receipting Configure and manage your tax receipt settings.	Supervisional Customize your donation form fields.	දු Contacts Customize your contact form fields.
	Import data (Beta) Import contact and donation data from a file.	Subscription View, update, and manage your subscription and billing details.	
	Sett	ing > Tax Receipting	

3. Switch to the *Templates* tab by selecting it from the tabs at the top.

4. Click the pencil icon next to the template you want to customize.

CharityOS		\$ Wellness Avenue 🗸
Essentials & Contacts & Donations	Tax receipting settings	
	Template	\$
	Aggregate receipt	Ø
	Individual Receipt	Ø

- 5. Under the Tax receipt email tab, customize these fields:
 - 1. Set the Sender name of the tax receipt email.
 - 2. Set the Reply-To email address.
 - 3. Select the language for the tax receipt email to edit.
 - 4. Customize the Message subject.
 - 5. Message body in the chosen language.
 - 6. (Optional) To see how the email looks, send yourself a test tax receipt email.

ender Wellness Avnue eply to email address info@canadahelps.org English French essage subject Thank you for supporting Wellness Avenue!
eply to email address info@canadahelps.org English French essage subject
info@canadahelps.org English French essage subject
English French
essage subject
essage subject
essage body
Thank you so much for your generous donation.
Your support is vital to our mission, and we are incredibly grateful
for individuals like you who help us make a difference in the lives of

6. Don't forget to click on Save changes to save your customizations!

What's Next?

After customizing your tax receipt email template, be sure to review and customize the Thank You Note that appears at the top of the tax receipt PDF file!