

# Manage Your Tax Receipts

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Before issuing your first tax receipt, make sure you've had the chance to customize the following tax receipt related settings:

- [Configure your Tax Receipt Settings](#)
- [Customize the Default Tax Receipt Thank-You Note](#)
- [Customize the Default Tax Receipt Email Message](#)

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## Consideration

- Contacts with no mailing address (1) and already receipted Donations (2) are not eligible for Receipting. Before issuing these receipts, you have to update your Contact (1) and issue a corrected Tax Receipt (2).
- The Archive Email address you've configured in the Tax Receipt setting page will always receive a copy of the tax receipt issued.
- Only one aggregate/annual tax receipt can be issued per donor, per year. If you void the receipt or record any other Donations for a donor after issuing their aggregate receipt, those Donations must be receipted one at a time or each individual donations can be selected together and issued as an aggregated receipt.

## Issue an individual tax receipt

1. Go to the Donation tab.
2. Use the search function to find and select the donation for which you'd like to issue a tax receipt.
3. On the donation details page, click the Issue tax receipt button on the top-right of the screen.

Rachel Green

\$3,000.00

Received on May 9, 2023

Fund: New Building

Delete donation

Issue tax receipt

Donation details

Edit

Donation ID	Payment method	Campaign	Recurring
ID-000096	Credit Card	-	No

Additional details

Edit

Status

Edit

4. In the Receipt Details window, choose your preferred Delivery method, then click Issue receipt to generate the tax receipt.

### Issue tax receipt

#### Receipt details

Donor name	Rachel Green
Total amount	\$3,000.00
Receiptable amount ⓘ	\$3,000.00
Receipt status	Not issued

#### Thank you settings

☐ Mark donation as thanked

#### Delivery method

Method

Email

Email

Print (Download)

Issue receipt

5. If you select the Print (Download) option, you'll be prompted to choose a location on your computer to save the tax receipt PDF.

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## Bulk issue from the Donations tab

1. Go to the Donations tab.
2. Select the checkboxes for donations you want to issue receipts for.
3. From the **Bulk Actions** dropdown menu, choose *Issue individual receipts*.

Wellness Avenue

Donations

Bulk Actions

Delete Donations

Issue individual receipts

Issue aggregate receipts

Export Donations

Search by name, email or receipt No.

Status

Date received

Campaign

+ Add Donation

Total raised  
\$146,431.7

Total donations  
235

Total donors  
44

Average donation  
\$623.11

Donor

Received

Amount

Fund

Campaign

Status

Receipt

2 donations are selected. [Select all 235 donations](#)

Richard Burke

11/13/2025

\$15.25

Wellness Initiative F...

Completed

KL53212

Rachel Green

10/13/2025

\$1,150.25

Farming

Completed

TX060225

☒

Rachel Green

10/13/2025

\$150.25

New Building

New Building

Pending

Rachel Green

10/13/2025

\$150.25

Farming

Pending

TX69510

Sarah Stevenson

05/27/2025

\$50.00

New Building

Completed

WELL00000220

4. Donations eligible for a tax receipt will show a green checkmark in the Eligibility column.

**Note:** To see why a donation is ineligible, click the Non-eligible tab.

5. Click the Issue receipts button at the bottom right.

Back

Issue individual receipts

Donations selected  
2

Eligible donations  
1

Non-eligible donations  
1

Already receipted donations  
0

All

Eligible

Non-eligible

Already receipted

Donor

Date Received

Total amount

Receiptable amount

Eligibility

Chandler Bing

09/12/2024

\$125.00

\$125.00

X

Chandler Bing

07/31/2024

\$250.00

\$250.00

✓

Issue receipts

6. In the Receipt details window, choose your preferred Delivery method and click Issue receipts again to finalize.

Receipt details

×

Options

☐ Mark donation as thanked
 ☐ Resend receipts for donations that have already been receipted

Delivery method

Method

Email

Email

Print (Download)

Issue receipts

7. If you select the Print (Download) delivery method, you'll be prompted to choose a location on your computer to save the tax receipt PDF.

## Issue aggregate/annual tax receipts

1. Go to the [Donations tab](#).
2. Select the checkboxes next to all donations you wish to issue aggregate receipts for.
3. From the **Bulk Actions** dropdown menu, choose *Issue aggregate receipts*.

<

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Wellness Avenue

Donations

Bulk Actions

Delete Donations

Issue individual receipts

Issue aggregate receipts

Search by name, email or receipt No.

Status

Date received

Campaign

+ Add Donation

Total raised

\$107,160.2

Total donations

141

Total donors

24

Average donation

\$760.00

<input type="checkbox"/>	Donor	Date Received	Amount	Fund	Campaign	Status	Receipt
5 donations are selected. <a href="#">Select all 141 donations</a>							
<input checked="" type="checkbox"/>	Rachel Green	05/09/2024	\$3,000.00	New Building		Completed	
<input type="checkbox"/>	Monica Geller	08/01/2024	\$30.00	Wellness Initiative...		Completed	
<input type="checkbox"/>	Chandler Bing	09/12/2024	\$125.00	General		Pending	
<input checked="" type="checkbox"/>	Phoebe Buffay	09/01/2024	\$50.00	Healthy Breakfast ...		Completed	
<input checked="" type="checkbox"/>	Rachel Green	05/09/2023	\$3,000.00	New Building		Completed	

4. Donations eligible for a tax receipt will display a green checkmark under the Eligibility column.

5. Choose the tax year for which you want to issue the receipt(s).

6. Click on Issue receipts at the bottom right of the screen.

**Issue aggregate receipts**

Tax year  
This year

Donations selected: 3    Eligible donations: 3    Non-eligible donations: 0    Already receipted donations: 0

All   Eligible   Non-eligible   Already receipted

Donor	Date Received	Total amount	Receiptable amount	Eligibility
Phoebe Buffay	10/01/2024	\$50.00	\$50.00	✓
Phoebe Buffay	09/01/2024	\$50.00	\$50.00	✓
Rachel Green	05/09/2024	\$3,000.00	\$3,000.00	✓

Issue receipts

7. In the Receipt details screen, select the desired Delivery method and click on Issue receipts again to complete the process.

**Receipt details**

Options

☐ Mark donation as thanked

☐ Resend receipts for donations that have already been receipted

**Delivery method**

Method

Email

Email

Print (Download)

Issue receipts

8. If you select the Print (Download) delivery method, you'll be prompted to choose a location on your computer to save the tax receipt PDF.

Additional Information:

- The tax receipt(s) will download inside a ZIP file.
- The total donation amount will show as an aggregated sum for all selected donations.
- In the Supplemental Information section of the receipt, a breakdown of the individual donations including the donation date and amount will be listed.

# Issue a Corrected Receipt

If a tax receipt has already been issued for a donation, but a correction needs to be made (e.g. changing the donation amount or adding a non-taxable amount), the existing tax receipt will need to be voided.

- 1. Go to the [Donations tab](#).
- 2. Use the search function to find and select the donation that needs to be corrected.
- 3. On the donation details page, click **Edit** to update the donation amount (e.g., change from \$350 to \$300).
- 4. After making the correction, click on **Manage Receipt** in the top-right corner.

Ben Geller

\$350.00

Received on November 11, 2024

Fund: General

Delete donation

Manage Receipt

⚠ This donation has already been receipted and so cannot be deleted to ensure CRA compliance.

Donation details

Edit

Donation ID	Payment method	Campaign	Recurring
ID-001050	Credit Card	-	No

Additional details

Edit

Status

Edit

\$ Net amount	\$350.00	Completed
\$ Fee amount	\$0.00	
Source	Offline	Notes
Thanked on	Not yet thanked	Edit
# Issued tax receipt No.	WELL00000064	

- 5. In the Manage tax receipt window, select **Void receipt** and confirm.

Manage tax receipt

Receipt details

# Issued tax receipt No.

WELL00000064

Issued date

November 19, 2024

Issued by

Wellness Avenue

Delivery method

Print

Receipt type

Single

Receipted amount

\$350.00

Receipt status

Issued

Thank you settings

☐ Mark donation as thanked

Delivery method

Method

Print (Download)

Void receipt

Resend receipt

- 6. Once the old receipt is voided, click on **Replace Receipt** to generate a new receipt that reflects the changes.

Manage tax receipt

Receipt details

# Issued tax receipt No. -

# Cancelled receipt number WELL00000064

# Issued date November 20, 2024

# Delivery method Print

# Receipt type Single

# Received amount \$350.00

# Receipt status Voided

Thank you settings

☐ Mark donation as thanked

Delivery method

Method

Print (Download) ▾

Resend original

Replace Receipt

Note: The Cancelled receipt number field will appear, and the receipt status will show as Voided until the new receipt is issued.

7. On the donation details page, you'll now see both the cancelled and new receipt numbers listed.

Additional details

Edit

\$ Net amount \$300.00

\$ Fee amount \$0.00

# Source Offline

# Thanked on Not yet thanked

# Issued tax receipt No. WELL00000071

# Tax receipt issued on November 20, 2024

# Receipt status Issued

# Cancelled receipts No. WELL00000064


# Issue a French tax receipt

The language of the tax receipt (English or French) is determined by the contact's preferred language.

To issue a tax receipt in French, please ensure that the contact's language preference is set to French before generating the receipt.

If you need to reissue an existing English receipt in French, the English receipt will need to be voided first. Follow these steps:

- 1. Go to the [Contacts](#) tab.
- 2. Use the search function to locate and select the contact whose receipt needs to be reissued.
- 3. On the contact's profile page, click on the *Profile* tab. From there, update the contact's Language Preference to French by clicking on **Edit**.

**Rachel Green**

**Key information**  
Primary Email  
rachel.green@fashionista.ca  
Primary Phone (Mobile)  
+1 (902) 556-6789  
Location  
Halifax, NS

**Notes**  
-Frequently donates to fashion-related causes, particularly those supporting women in business or job training programs. -Prefers high-profile charity events with luxury elements, and loves to network. -Potential volunteer for charity fashion shows or galas.  
12/25/2024 **Edit**

Donations

**Profile**

Delete contact

Contact information

Name

Rachel Green

Type

Individual

Primary Email (Personal)

rachel.green@fashionista.ca

Primary Phone (Mobile)

+1 (902) 556-6789

Location

Location

Halifax, NS

Primary Address (Home)

5650 Spring Garden Road, B3J 1H4

Additional details

Preferred communication method

Email

Receiving preference

Any


Contact source

Offline

Language Preference

French

- 4. While still on the contact's profile page, click on the *Donations* tab and click on the donation you want to reissue the receipt for.

**Rachel Green**

**Key information**  
Primary Email  
rachel.green@fashionista.ca  
Primary Phone (Mobile)  
+1 (902) 556-6789  
Location  
Halifax, NS

**Notes**  
-Frequently donates to fashion-related causes, particularly those supporting women in business or job training programs. -Prefers high-profile charity events with luxury elements, and loves to network. -Potential volunteer for charity fashion shows or galas.  
12/25/2024 **Edit**

Donations

Profile

Delete contact

Total lifetime donations

\$32070

Since May 19th, 2019

Last donation

\$10

November 19th, 2024

Largest donation

\$10000

October 2nd, 2024

Number of donations

23

All-time

+ Add Donation

Date	Amount	Campaign	Status	Received
11/19/2024	\$10.00		Completed	No
11/14/2024	\$100.00		Completed	Yes
11/13/2024	\$10.00		Completed	Yes

- 5. Click on **Manage Receipt** and select Void to cancel the existing English receipt.



Rachel Green

\$10.00

Received on November 13, 2024

Fund: Wellness Initiative Fund

Delete donation

Manage Receipt

⚠ This donation has already been receipted and so cannot be deleted to ensure CRA compliance.

Donation details

Donation ID

Payment method

Campaign

Recurring

ID-000830

Cash

-

No

Edit

Additional details

Edit

Status

Edit

Select Manage receipt

Manage tax receipt

Receipt details

# Issued tax receipt No.

WELL00000062

📅 Issued date

November 13, 2024

👤 Issued by

Dan Poliziani

✉ Delivery method

Email

📄 Receipt type

Single

💰 Receipted amount

\$10.00

🔄 Receipt status

Issued

Thank you settings

☐ Mark donation as thanked

Delivery method

Method

Email

▼

Void receipt

Resend receipt

Select Void receipt

6. In the Manage tax receipt window, click on **Replace Receipt**. The new receipt will be automatically generated in French, based on the contact's updated language preference.

## Manage tax receipt

### Receipt details

# Issued tax receipt No.	-
# Cancelled receipt number	WELL00000062
📅 Issued date	November 25, 2024
👤 Issued by	Wellness Avenue
✉️ Delivery method	Email
📄 Receipt type	Single
💵 Receipted amount	\$10.00
🔄 Receipt status	Voided

### Thank you settings

☐ Mark donation as thanked

### Delivery method

Method

Email

[Resend original](#)

[Replace Receipt](#)