Manage Your Tax Receipts

Last Modified on 09/19/2025 12:03 pm EDT

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

Consideration

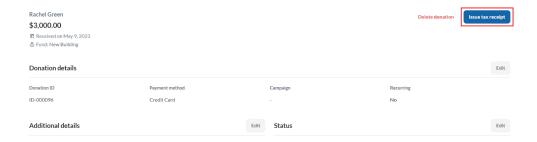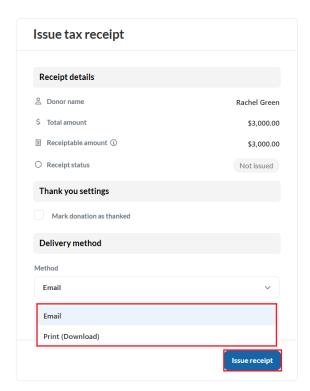- Contacts with no mailing address (1) and already receipted Donations (2) are not eligible for Receipting. Before issuing these receipts, you have to update your Contact (1) and issue a corrected Tax Receipt (2).
- The Archive Email address you've configured in the Tax Receipt setting page will always 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 indvidiual 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 bar to find and select the donation you'd like to issue a tax receipt for.

3. On the donation details page, click on the **Issue tax receipt** button on the top-right of the screen.
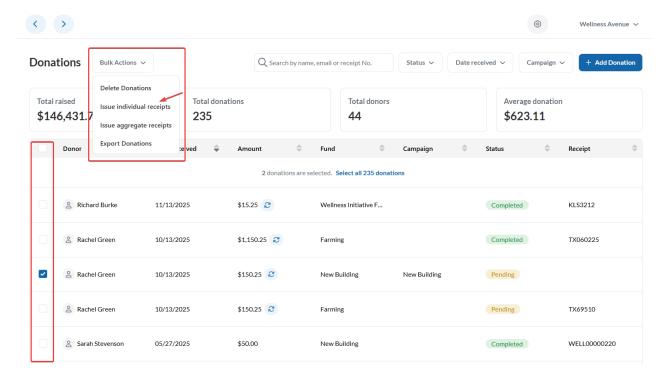
Rachel Green
$3,000.00
📅 Received on May 9, 2023
⚖ Fund: New Building

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 on**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.
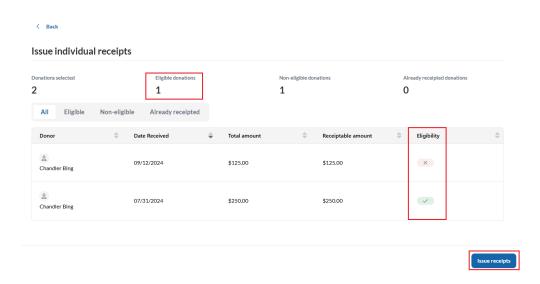
Bulk issue from the Donations tab

1. Go to the **Donations** tab.

2. Select the checkboxes for donations you want to issue receipts for.

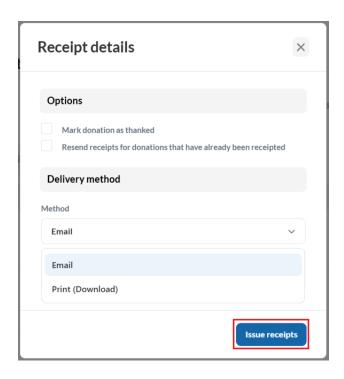**3.** From the **Bulk Actions** dropdown menu, choose *Issue individual receipts*.

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

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

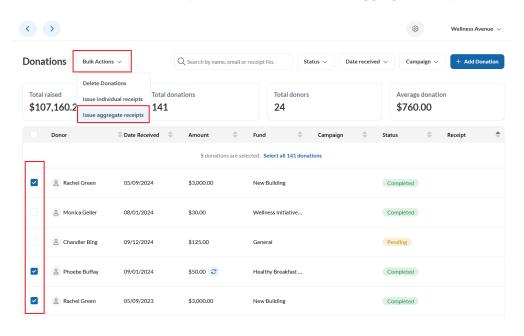**Note: To see why a donation is ineligible, click the Non-eligible tab.**

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.

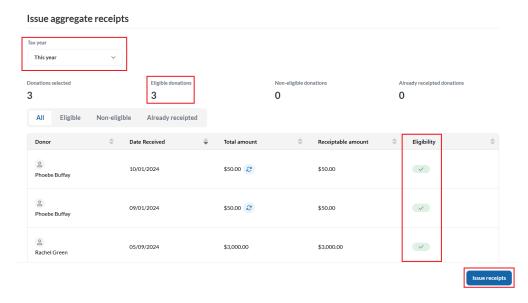## Issue aggregate/annual tax receipts

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*.

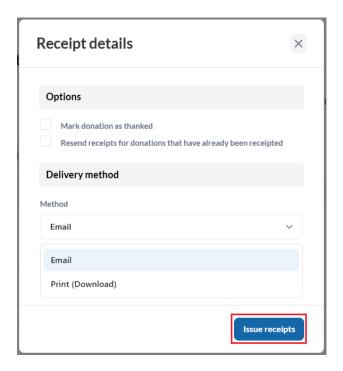|	Donor	Date Received	Amount	Fund	Campaign	Status	Receipt
				5 donations are selected. **Select all 141 donations**			
☑	👤 Rachel Green	05/09/2024	$3,000.00	New Building		Completed	
☐	👤 Monica Geller	08/01/2024	$30.00	Wellness Initiative...		Completed	
☐	👤 Chandler Bing	09/12/2024	$125.00	General		Pending	
☑	👤 Phoebe Buffay	09/01/2024	$50.00 🔄	Healthy Breakfast ...		Completed	
☑	👤 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.

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

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.
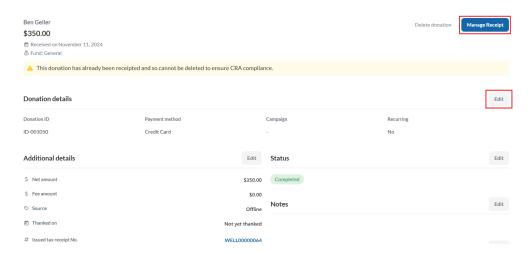
Additional Information:

- 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.
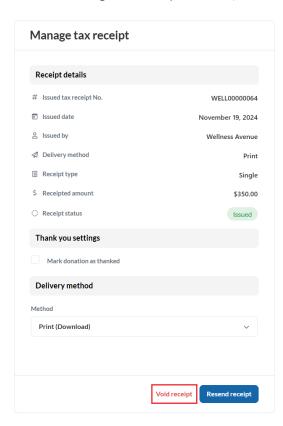
Issue a Corrected Receipt

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.
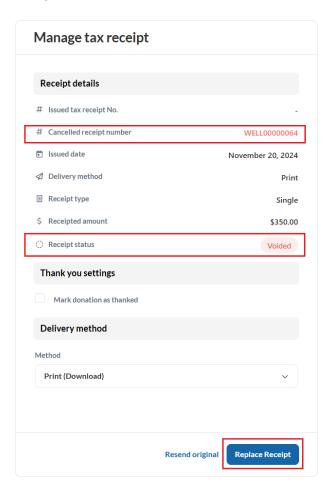
1. Go to the **Donations** tab.

2. Use the search bar to find and select the donation that needs to be corrected.

3. On the donation details page, click on **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.

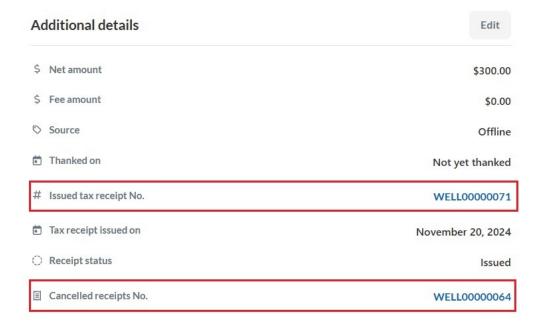**5.** In the Manage tax receipt window, select **Void receipt** and confirm.

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

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.
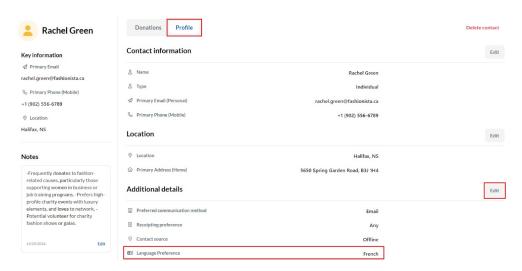
Issue a French tax receipt

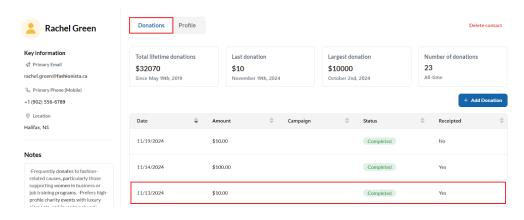The language of the tax receipt (English or French) is determined by the contact's preferred language.

To issue a tax receipt in French, please ensure 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:
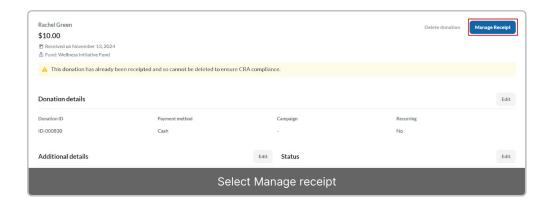
1. Go to the **Contacts** tab.

2. Use the search bar 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**.
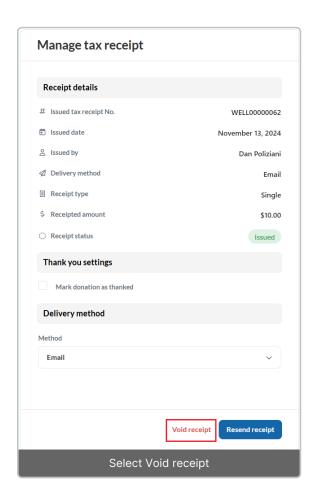

4. While still on the contact's profile page, click on the *Donations* tab and click on the donation you want to reissue the receipt for.

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

Select Manage 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**