

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 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 donationIssue tax receipt

Donation details

Donation ID
ID-000096

Payment method
Credit Card

Campaign
-

Recurring
No

Edit

Additional details

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*.

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Wellness Avenue

Donations

Bulk Actions ▾

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

Delete Donations
Issue individual receipts
Issue aggregate receipts
Export Donations

<input type="checkbox"/>	Donor	Date received	Amount	Fund	Campaign	Status	Receipt
2 donations are selected. Select all 235 donations							
<input type="checkbox"/>	Richard Burke	11/13/2025	\$15.25	Wellness Initiative F...		Completed	KLS3212
<input type="checkbox"/>	Rachel Green	10/13/2025	\$1,150.25	Farming		Completed	TX060225
<input checked="" type="checkbox"/>	Rachel Green	10/13/2025	\$150.25	New Building	New Building	Pending	
<input type="checkbox"/>	Rachel Green	10/13/2025	\$150.25	Farming		Pending	TX69510
<input type="checkbox"/>	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.

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

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

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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	
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

- Go to the **Donations** tab.
- Select the checkboxes next to all donations you wish to issue aggregate receipts for.
- 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

	Donor	Date Received	Amount	Fund	Campaign	Status	Receipt
5 donations are selected. Select all 141 donations							
<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	

- 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 received donations: 0

All Eligible Non-eligible Already received

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 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.

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	
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 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**.

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.

11/25/2024

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

Halifax, NS

Primary Address (Home)

5650 Spring Garden Road, B3J 1H4

Additional details

Preferred communication method

Email

Receipting 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.

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	Receipted
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

ID-000830

Payment method

Cash

Campaign

-

Recurring

No

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