

Configure receipts for donors' tax deductible donations

Last Modified on 09/05/2023 6:55 am PDT

You can configure receipts that go to your supporters in several ways. You can define a default template for all receipts, regardless of the Activity type (e.g. Text to Donate, Survey, Volunteer Signup, etc.) in the Account Settings. Then within each form inside an Activity, you can personalize the specific activity receipt.

Account-wide Receipt Configuration

Click on **Settings > Receipts and Notifications**.

The screenshot shows a web application interface for configuring receipts. On the left is a 'Main Menu' sidebar with options: Settings, Users, Fundraisers, Organization, Receipts and Notifications (highlighted), Year-End Consolidated Receipts, Remittance, Billing, Integrations, Order History, Shared Settings, and QR Codes. The main content area is titled 'Settings' and 'Receipts & Notifications'. It includes a 'Back to Dashboard' link and a sub-header 'Receipts'. Below this is a form with several sections: 'Receipt Message' with a text area containing 'Thank you for your support to [organization name].'; 'Contact Email' with a text field containing 'info@organization.com' and a note that it will be used for all receipts; 'Email Subject Line' with a text field containing 'Thank you for your support' and a note that it is the preferred subject line; 'Contact Phone' with a text field containing '1 (800) 667-8075' and a note that it will be used for all receipts; 'Include Tax Info' with a toggle switch turned on and a note that donors can claim a tax deduction; and 'Compliance Message' with a text area containing 'No goods or services were received in return for this gift. GiveSmart Fundraise (Training) is a 501(c)(3) charity.' There is also a 'Preview PDF Attachment' link and a 'Notifications' section at the bottom. A 'Save' button is located at the bottom left of the form.

This version of the receipt should be more generic as it will be the template for all receipts. Make the **Receipt Message** something that could apply to virtually any setting, like "Thank you for your support to [organization name]."

Adding the other information in the Receipt & Notification Settings means that the information will also show on the form level:

- **Contact Email** - This is the email address the receipt will send from and where your supporters can reply if needed.
- **Email Subject Line** - Like the Receipt Message, keep this generic so it can apply to any type of activity, such as "Thank you for your support."
- **Contact Phone** - If you include this, it will show in the email so supporters can call you. If you wish not to receive calls, leave it blank.

- **Include Tax Info** - You have the option to turn on or off official tax-deductible donation receipts that are sent via email. If you prefer not to send donation receipts, switch this to hide.
- **Compliance Message** - When the Include Tax Info is set to show, the compliance message will automatically appear and generate. The message should include your organization's name. It is always a good idea to verify the information.
- Click **Preview PDF Attachment** to download a sample of the receipt the donor will receive.

The **Notifications** section allows you to configure the emails that will be sent to people in your organization to alert them that someone has completed a form. For more information on setting up these Notifications, click [here](#).

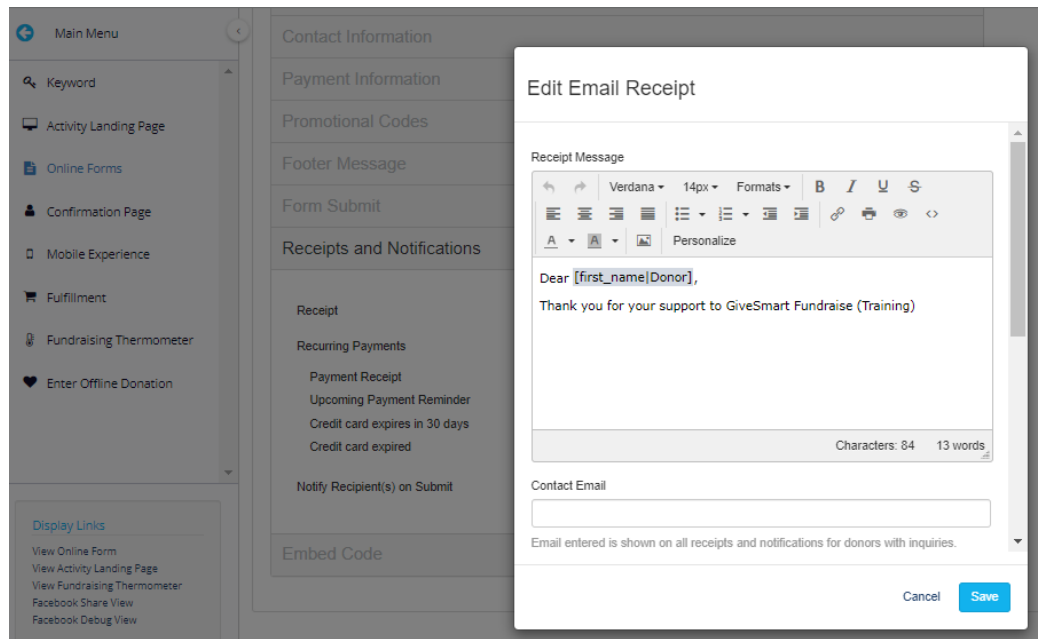
Activity-Specific Receipt Configuration

Often different receipt language is needed from one activity to another. You can personalize receipts for individual activities so that you can sell goods or services on one form while sending tax-deductible receipts on others. Follow these steps to change activity-level receipts:

1. Go into the activity you wish to edit the receipt. Likely you will do this by going into the corresponding Campaign tile, then clicking on the activity's name or keyword.
2. Click on **Online Forms** in the left column.
3. Inside the **Receipts and Notifications** section, click on **Edit Email**.

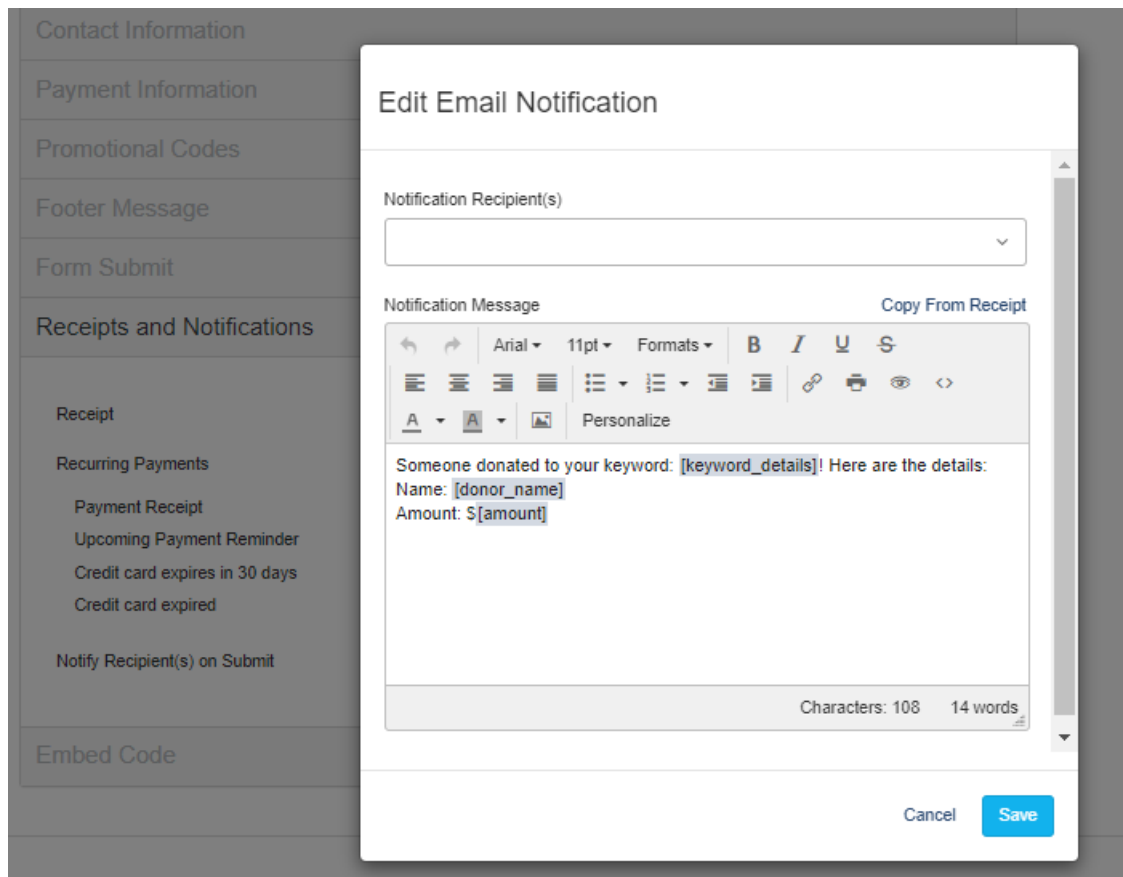
Contact Information	
Payment Information	
Promotional Codes	
Footer Message	
Form Submit	
Receipts and Notifications	
Receipt	<input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> Edit Email <input checked="" type="checkbox"/> SMS
Recurring Payments	
Payment Receipt	<input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> SMS
Upcoming Payment Reminder	<input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> SMS
Credit card expires in 30 days	<input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> SMS
Credit card expired	<input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> SMS
Notify Recipient(s) on Submit	<input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> Edit Notification
Embed Code	

4. Update the message.
 - This looks exactly like the setup in the Account settings, except here you can use the Rich Text Editor to format your message with links, images, colors, etc.
 - You can also **Personalize** the message with any information collected from the form - except payment information - by clicking on **Personalize**. Add a generic phrase for that item if the donor did not fill in that section.



5. Click **Save** at the bottom.

The **Notifications** section allows you to configure the emails that will be sent to people in your organization to alert them that someone has completed a form. For more information on setting up these Notifications, click [here](#).



What does the receipt email look like?

Hello Jane,

Thank you for your donation to NP.org.

Name:

Jane Smith

Amount:

\$103.62

Date:

09/01/23

Payment Method:

Credit Card ending in 1111

Download PDF

For questions about this transaction, please contact gifts@np.org

No goods or services were received in return for this gift. NP.org is a 501(c)(3) charity.

What about the PDF Receipt?



NP.org

Transaction Receipt

Date: 09/01/2023

Jane Smith
27001 Agoura Rd
Calabasas, CA 91301

General Admission

Unit Price: \$30.00
Unit Fair Market Value: \$15.00

Quantity	2
Price	\$60.00
Fair Market Value	\$30.00

Donation

Amount	\$25.00
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Subtotal	\$85.00
Processing Fee	\$2.17

Total Received	\$87.17
Total Fair Market Value	\$30.00
Tax-Deductible Amount	\$57.17

For questions about transaction(s), please contact gifts@np.org.

NP.org is a 501(c)(3) charity.