

Year-End Consolidated Receipts

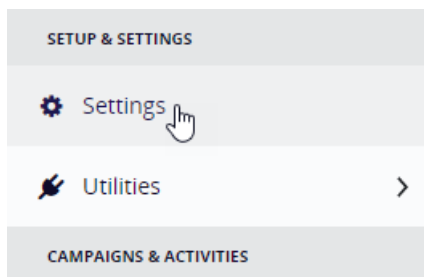
Last Modified on 03/20/2023 1:05 pm PDT

When your donors donate, they will automatically be emailed a receipt of their donation, as set up in the Account Settings > [Receipts and Notifications](#) category. You can even resend individual receipts or download those individual receipts with a [Reporting feature](#).

But if you want to send out a consolidated receipt for the year for your donors, for easier tax reporting, you can send to all your donors at once using the Year-End Consolidated Receipts function.

If you want to send one supporter a consolidated year-end report instead of everyone, you can do it from the Contacts page from [People > Contacts](#).

To start, go into your Account Settings, by clicking on **Settings** under **Setup & Settings** in the left menu.



In the **Settings**, click on the **Year-End Consolidated Receipts** category on the left.



Main Menu

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Year-End Consolidated Receipts



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Contact Number: If you want your supporters to reach you by phone you can include the phone number here. By default, it will bring in the phone number added from the [Account Settings > Organization](#) category.

Compliance Message: This is automatically generated, but it is always a good idea to verify that everything is correct. It will bring in your Organization Name from the [Account Settings > Organization](#) category.

Save: Don't forget to click Save to save any changes you've made!

Configure Email and PDF Attachment

Email Address

Donation receipts will be sent from this address

Email Subject

The subject line for the donation receipt email

Email Message

[✉ Preview Email](#)

PDF Message

The message displayed above the consolidated report

Contact Number

Phone # displayed in the PDF attachment

Compliance Message

Displayed in the footer of the PDF attachment

[📄 Preview PDF Attachment](#)

Schedule Your Email

Preview Email

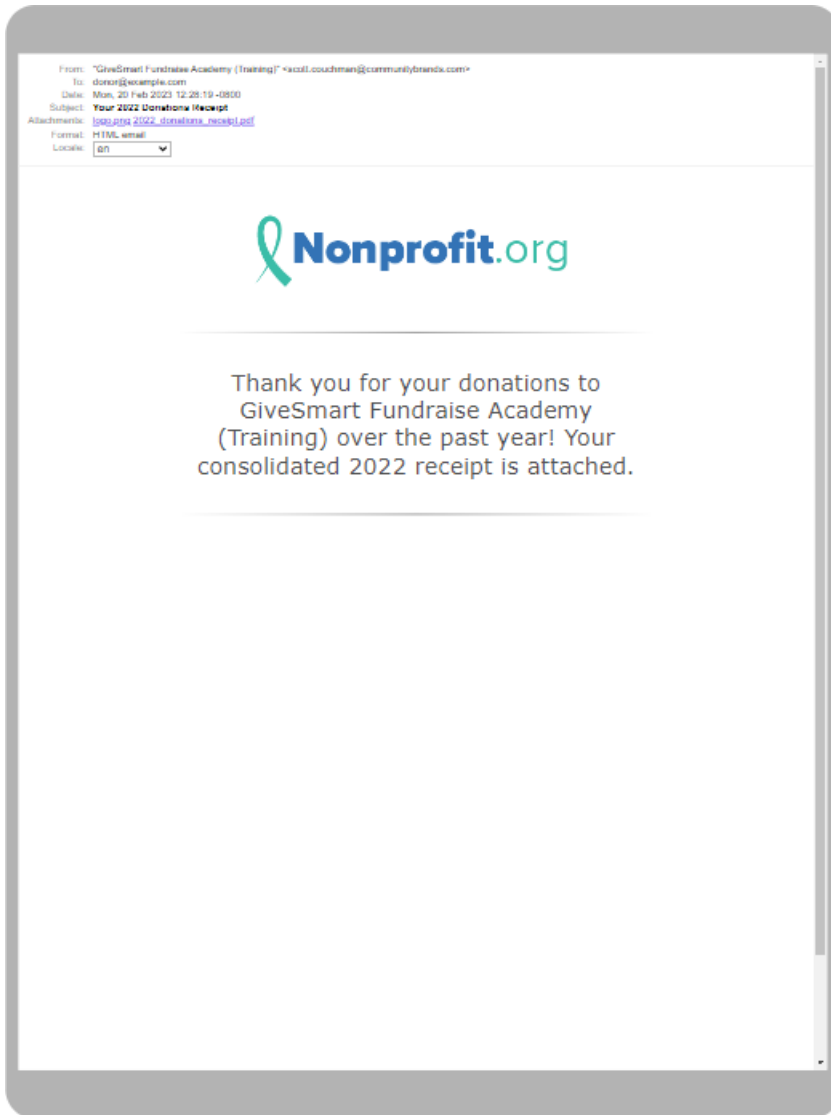
In the Configure Email and PDF Attachment section, you can preview what the email will look like. It will bring in the [Organization Logo](#) to appear at the top of the email. You can preview the email as it will appear in a desktop view:

From: "GiveSmart Fundraise Academy (Training)" <scott.couchman@communitybrands.com>
To: donor@example.com
Date: Mon, 20 Feb 2023 12:28:19 -0800
Subject: Your 2022 Donations Receipt
Attachments: [\[image: 2022_donations_receipt.pdf\]](#)
Format: HTML_email
Locale: en



Thank you for your donations to
GiveSmart Fundraise Academy
(Training) over the past year! Your
consolidated 2022 receipt is attached.

Or a Mobile view:



Preview PDF Attachment

In the Configure Email and PDF Attachment section, you can preview what the PDF will look like. It will bring in the Brand Logo to appear at the top of the PDF. When you click on the link, it will download the PDF preview.

GiveSmart Fundraise Academy (Training)



Receipt
Date: 02/20/2023
Phone: (818) 495-4531

Please see your consolidated 2022 receipt below.

Date	Name	Organization Name	Keyword	Campaign	Amount
Total					\$XX.XX

For questions about transaction(s), please contact scott.couchman@communitybrands.com or call (818) 495-4531.

Schedule Your Email

When you open the Schedule Your Email section, you can click on the blank box to the right to select the date and time you would like to send the emails.

Use the calendar to choose the appropriate date and use the slider to choose the hour you would like to send the emails.

Click Done when you have the desired Date and Time.

Configure Email and PDF Attachment

Schedule Your Email

Schedule your email receipts Pacific Time (US & Canada)
You will receive a confirmation email once your receipt(s) are delivered.

[Schedule](#)

03/20/2023 12:00 pm

March 2023

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Time
12:00 pm

Hour

[Now](#) [Done](#)



It will then show you that date and time in the Schedule Your Email section. You can click the

Pencil icon to edit the date and time or the Trashcan icon to delete the scheduled email.

If you delete it, it will warn you before completing the deletion.

Configure Email and PDF Attachment

Schedule Your Email

Your email has been scheduled for delivery on
03/20/2023 12:00 pm Pacific Time (US & Canada)  

You will receive a confirmation email once your receipt(s) are delivered.

When you edit the date and time (the Pencil icon), it will show you the box again, populated with your existing selected date and time.

Click the box to change the date and time like before, and click Update when you are done.

Otherwise, you can click **No, I'll keep my current schedule** to cancel the change.

Configure Email and PDF Attachment

Schedule Your Email

Schedule your email receipts Pacific Time (US & Canada)
You will receive a confirmation email once your receipt(s) are delivered.

Now your consolidated receipts will be sent to all your donors for the year!