

Send Consolidated Year End Tax Information to One Supporter

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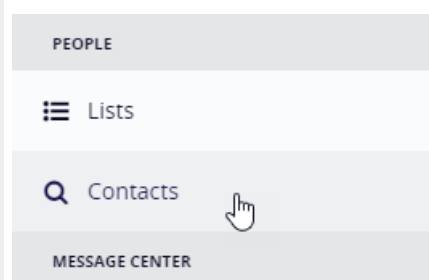


When your donors donate, they will automatically be emailed a receipt of their donation, as set up in the Account Settings > [Receipts and Notifications](#) category. You can even resend individual receipts or download those individual receipts with a [Reporting feature](#).

To send your supporters a Consolidated Year End Tax Receipt, you can send it to everyone at once from the Account Settings > [Year-End Consolidated Receipts](#) category. For more on that functionality, [click here](#).

If you need to send a Year-End Consolidated Receipt to one specific supporter, you can do that from **People > Contacts** as outlined in this article.

Find the donor's record



Here you can search for a contact in different ways: Contact information, date range amounts, etc. Since this is usually a request from the donor, looking for them through their name, email and/or phone will probably be the most efficient.

Click Search at the bottom of the page when ready.

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Search Contacts

Search by fields and/or activities to build a new list. For example, search for all major donors (gave a gift above \$500)

Contact Information

| | | |
|---|---|---|
| First Name <input type="text" value="First Name"/> | Last Name <input type="text" value="Last Name"/> | Email <input type="text" value="Email"/> |
| Phone <input type="text" value="Phone"/> | <input type="checkbox"/> Show only contacts with a verified mobile number | |

Activities

| | | |
|--|--|--|
| Campaign <input type="text" value=""/> | Keyword <input type="text" value=""/> | Form <input type="text" value=""/> |
| <small>Select a campaign to filter by its keywords</small> | | <small>Select a campaign and/or keyword to filter by its forms</small> |

Individual Gift

| | | |
|--|--|---|
| Amount Min <input type="text" value="\$ Amount Min"/> | Amount Max <input type="text" value="\$ Amount Max"/> | Frequency <input type="text" value="All"/> |
|--|--|---|

Gift Date

| | |
|---|---|
| Start Date <input type="text" value="02/23/2022"/> | End Date <input type="text" value="03/02/2022"/> |
|---|---|

Location

| | | |
|---|---|---|
| City <input type="text" value="City"/> | State <input type="text" value="State"/> | Zip <input type="text" value="Zip"/> |
|---|---|---|

On the next page, you will see the results of your search based on your search options. Find the person's name and information in the list at the bottom.

Sending the Receipt

Click on the **Action** Menu by their name.

Click **Send 202x tax receipt**.

Note: Only the last year's tax receipt will be available.

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Search Criteria (click to toggle) Q Edit Search Create List

01/01/2021 - 12/31/2021 (365 Days)

Search Options

Frequency: All List size: 2

| Name | Email | Phone | Address | State | Zip | Actions |
|------------|---------------------------------|-----------------|-------------------|-------|-------|---------|
| Emma Jones | | 1(626) 527-9855 | | | | ... |
| Liam Smith | scouchman+demo1@mobilecause.com | 1(888) 661-8804 | 27001 Agoura Road | CA | 91301 | ... |

It will ask if you want to actually send it. Click **OK**.

app.mobilecause.com says

Are you sure you want to send an consolidated receipt to scouchman+demo1@mobilecause.com?

Cancel OK

It will indicate that the email has been sent and the recipient will be emailed the tax receipt immediately.

A consolidated receipt has been emailed to scouchman+demo1@mobilecause.com ×