

Send Consolidated Year End Tax Information to One Supporter

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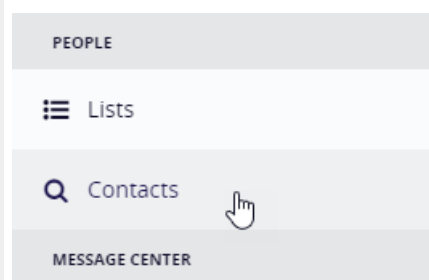
Thank you for your donations to GiveSmart Fundraise Academy (Training) over the past year! Your consolidated 2022 receipt is attached.

When your donors donate, they will automatically be emailed a receipt of their donation, as set up in the **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 **Settings > Year-End Consolidated Receipts** category.

If you need to send a Year-End Consolidated Receipt to one specific supporter, you can do that by selecting **Contacts** from the left navigation, and following the steps below.

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"/>
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Gift Date

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

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

Search Criteria (click to toggle)

Q Edit Search

Create List

01/01/2020 - 12/31/2020 (366 Days)

Search Options

Frequency: All

List size: 34

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Name	Email	Phone	Address	State	Zip	Actions
Louisa Strentzel						⋮
Ezra Carr						⋮
John Muir						⋮
Gifford Pinchot						⋮

Send 2022 tax receipt
Download 2022 tax receipt

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

Are you sure you want to send an consolidated receipt to kirsten@givesmart.com?

Cancel

OK

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