

# Charitable Tax Receipts

\*\*ALL ITEMS ARE SUBJECT TO CHANGE\*\*



- Disclaimer: Everything you're about to see still in development, and therefore, subject to change.
- Still on track to have something in your hands for beta testing by the end of the year.
- We anticipate continuing to add features beyond the initial release based on your feedback.





# Sample HTML Templates

The screenshot displays the TESSITURA HTML Templates management interface. The interface is divided into several sections:

- System Navigation:** Located on the left, it includes a search bar, expand/collapse buttons, and a list of template categories. The 'Tax Receipt Cover Letter' category is highlighted with a red box.
- ADD A NEW TEMPLATE:** A section on the left with checkboxes for 'ACTIVE ONLY' and 'GROUP BY CATEGORY', and a search bar.
- Editing Template:** The main area shows the details for 'Example Charitable Tax Receipt Cover Letter'. It includes fields for 'DESCRIPTION', 'TEMPLATE CATEGORY', 'EMAIL SUBJECT', 'HEADER', and 'FOOTER'. A large 'IN DEVELOPMENT' watermark is overlaid on the preview area.
- Preview and Code Editor:** The bottom right section shows a preview of the rendered template and a code editor with HTML code. The code includes a comment: 'This head section is needed to insure that QR Codes and other background elements print correctly. If this template is printed to paper or PDF by the customer leave this code in place.'

- Providing sample templates for cover letter, and receipt – can obviously copy and customize as many formats as you choose
- Both emailed and printed receipts will be based on HTML templates

**Autumn Ridge Cultural Center**

Dear Mr. Beikman,

Thank you for your support this year of the Autumn Ridge Performing Arts Center. 100% of your donation supports our not-for-profit mission of being accessible and affordable to all audiences and producing stories that endure, from classic plays to timeless musicals to exciting new works.

**For your tax records, your tax receipt for the 2022 calendar year is attached to this email.**

Giving, of course, is much more than tax savings. As you consider the many organizations that need your support, please remember Autumn Ridge and the vital role we play in producing world-class theatre with the power to inspire, enrich, and educate our lives.

On behalf of the entire Autumn Ridge community, thank you.

Marisa Perry  
Director, Applications Services

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**Personal Information:**  
Mr. Roney Edsel Beikman  
9016 Fullbright Ave Enfield, Connecticut 06082  
USA  
[happy@lycos.ccc](mailto:happy@lycos.ccc)

**Tax Receipt No:** 1  
**Constituent Id:** 111  
**Calendar Year:** 2022  
**Total Giving:** \$100.00

IN DEVELOPMENT

**Fine Print**

Donations are tax deductible to the fullest extent allowed by law. Autumn Ridge Cultural Center is a non-profit charitable corporation with 501(c)(3) tax exempt status in the United States.

Tax Receipt No: 1

**Autumn Ridge Cultural Center**  
1 East 33rd Street, 4th Floor  
New York, NY 10016.  
U.S. tax-exempt number: 20-2329938.

**Summer Ridge Cultural Center**

123 Summer Ridge Way  
Toronto, ON MSH 4G1  
Registration No.: 123456789RR0001  
Issued Location: Toronto

**Personal Information:**  
Mr. Roney Edsel Beikman  
9016 Fullbright Ave Enfield, Connecticut  
06082  
USA  
[happy@lycos.ccc](mailto:happy@lycos.ccc)


**Constituent Id:** 111  
**Tax Receipt No:** 2  
**Calendar Year:** 2022  
**Issued Date:** Aug 23, 2022

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**Contributions**

Description	Date	Total
Ind General	8/19/2022	\$100.00
<b>Total Contributions:</b>		<b>\$100.00</b>

Official Receipt – Retain for Income Tax Purposes  
This receipt replaces the following receipt(s): 1  
Canada Revenue Agency [canada.ca/charities-giving](http://canada.ca/charities-giving)



- Providing sample templates for cover letter, and receipt – can obviously copy and customize as many formats as you choose
- Preference for email or print receipts recorded as a Contact Point Purpose

# New Constituent Pages

Mr. John Michael Osborn #1007

TAX RECEIPT FORMAT | REPRINTS | All Voids

REPRINT	VOID	TAX RECEIPT NO.	TAX RECEIPT TEMPLATE	TOTAL GIVING AMT.	CREATE DATE
<b>OSBORN HOUSEHOLD</b>					
<input checked="" type="checkbox"/>			Standard Tax Receipt	\$1.00	9/2/2022
	<input checked="" type="checkbox"/>	567001	Standard Tax Receipt	\$1.00	9/2/2022
<input checked="" type="checkbox"/>			Standard Tax Receipt	\$1.00	9/2/2022
	<input checked="" type="checkbox"/>		Standard Tax Receipt	\$1.00	9/2/2022
			Standard Tax Receipt	\$1.00	9/2/2022
<b>JOHN OSBORN</b>					
			Standard Tax Receipt	\$1.00	9/2/2022
		887007	Standard Tax Receipt	\$1.00	9/2/2022
	<input checked="" type="checkbox"/>		Standard Tax Receipt	\$1.00	9/2/2022
			Standard Tax Receipt	\$1.00	9/2/2022
		991008	Standard Tax Receipt	\$1.00	9/2/2022
	<input checked="" type="checkbox"/>		Standard Tax Receipt	\$1.00	9/2/2022
			Standard Tax Receipt	\$1.00	9/2/2022

1 - 9 OF 18 ITEMS

**Giving History**  
Your contributions are listed below by the date on which they were received. Thank you for your generosity and support!

*Existing Table of Contributions*

**Tax Receipts**  
Your tax receipts are listed below by the date on which they were generated.

Calendar Year	Receipt Number	Giving Amount
2020	5980879450	\$100.00
2019	2407837	\$100.00

View Receipt

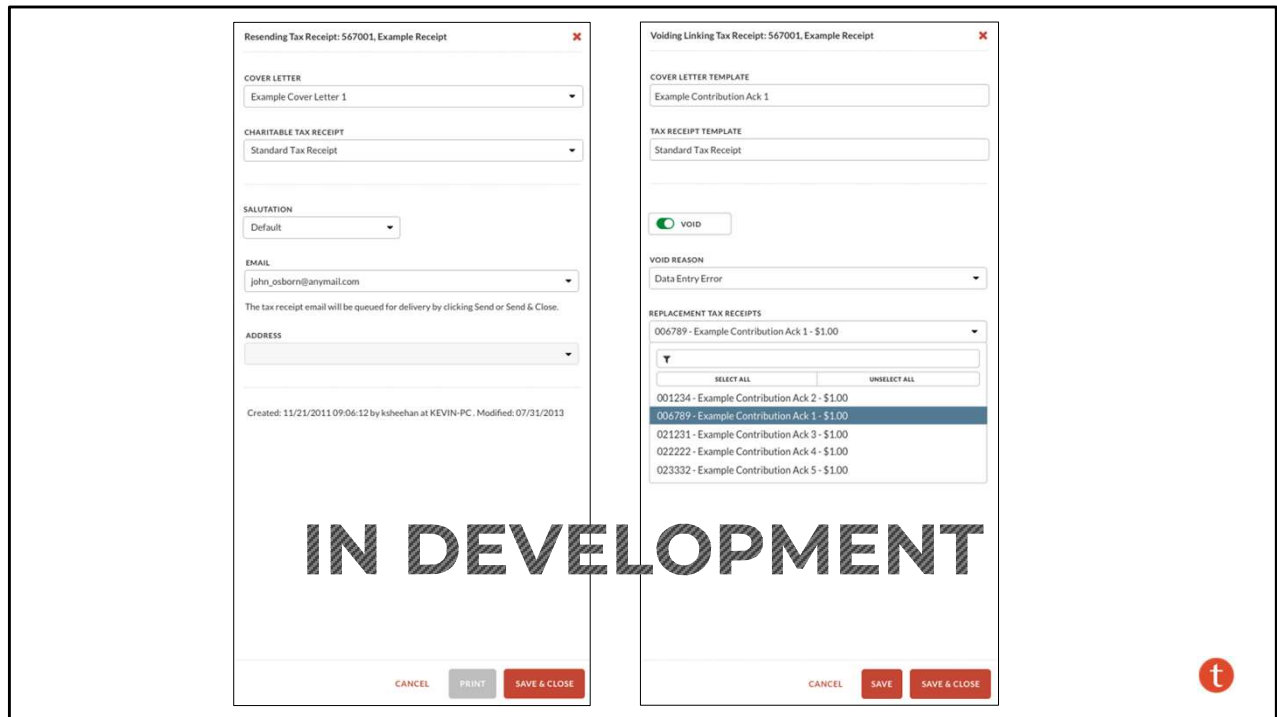
View Receipt

- Main grid
  - Option to use our cloud storage or your own storage location
  - Our option is available free of charge, but not yet available in Canadian data center – coming soon
  - Also planning to expose this information on the Giving History page in TNEW so users can reprint their own tax receipts.
- Edit icon to see details for any receipt or to take action on the receipt
- Overlay – receipt details, including all the gifts included in the receipt
- Void and Reprint/Resend buttons to take action on the receipt

# New Constituent Pages

The image displays two screenshots of a web application interface for managing tax receipts. The left screenshot shows a main grid with columns for 'REPRINT', 'VOID', 'TAX RECEIPT NO.', 'TAX RECEIPT TEMPLATE', 'TOTAL GIVING AMT.', and 'CREATE DATE'. It lists receipts for 'OSBORN HOUSEHOLD' and 'JOHN OSBORN'. The right screenshot shows a detailed view of a receipt titled 'Editing Tax Receipt: 567001, Example Receipt'. It includes fields for 'TAX RECEIPT NO.', 'TAX RECEIPT TEMPLATE', 'VOID LINK', 'VOID REASON', 'TOTAL GIVING AMOUNT', 'SALUTATION', and 'DELIVERY CONTACT POINT'. A table below lists 'Contributions Included in this Receipt' with columns for 'REV. NO.', 'GIFT AMT.', 'PAYMENT DATE', 'TAX CAMPAIGN', 'DESIGNATION', 'FUND', 'APPEAL', 'TRANSACTION NO.', 'TRANSACTION DATE', and 'BATCH'. A large 'IN DEVELOPMENT' watermark is overlaid on the grid area.

- Main grid
  - Option to use our cloud storage or your own storage location
  - Our option is available free of charge, but not yet available in Canadian data center – coming soon
  - Also planning to expose this information on the Giving History page in TNEW so users can reprint their own tax receipts.
- Edit icon to see details for any receipt or to take action on the receipt
- Overlay – receipt details, including all the gifts included in the receipt
- Void and Reprint/Resend buttons to take action on the receipt



- Re-Generate – email or print
- Void/Link – open the voided receipt and link to an already existing replacement receipt

# Receipt Maintenance Utility

**IN DEVELOPMENT**

Charitable Tax Receipt Set Parameters: Set\_1

DESCRIPTION: Set\_1 CONTROL GROUP: Void SET TYPE: Void

COVER LETTER: Charitable Tax Receipt CALENDAR YEAR: 2022

CONSTITUENT: Constituent List

TAX RECEIPT NUMBER FILE: Void Reason

SALUTATION TYPE: Contact Point Category: Contact Point Purpose

PAYMENT DATE START / END: mm/dd/yyyy mm/dd/yyyy MIN. CUMULATIVE GIVING TOTAL

CONSTITUENT TYPE: CONTRIBUTION TYPE: CAMPAIGN (2 values selected)

DESIGNATION: FUND: APPEAL (2 values selected)

MEMBERSHIP ORGANIZATION: MEMBERSHIP LEVEL (2 values selected)

CANCEL DELETE DUPLICATE **SAVE** **POPULATE**

- Parameter sets
- Populate results

Charitable Tax Receipt Set: Set\_1

<input type="checkbox"/>	ID	SALUTATION	COVER LETTER	CHARITABLE TAX RECEIPT	TOTAL GIVING AMOUNT	TAX RECEIPT NO.	DELIVERY CON ...
<input checked="" type="checkbox"/>	1007	Mr. Shin Kaizama	[cvr letter data]	[tax receipt data]	\$200.00	000123	email@mail.com
<input type="checkbox"/>	2001	Mr. Len Pal	[cvr letter data]	[tax receipt data]	\$200.00	000123	email@mail.com
<input type="checkbox"/>	1234	Mr. John Osborn	[cvr letter data]	[tax receipt data]	\$200.00	000123	email@mail.com
<input type="checkbox"/>	2431	Ms. Lisa Frank	[cvr letter data]	[tax receipt data]	\$200.00	000123	email@mail.com
<input type="checkbox"/>	5432	Mr. Mickey Simon	[cvr letter data]	[tax receipt data]	\$200.00	000123	email@mail.com

**IN DEVELOPMENT**

CANCEL SAVE PRINT PREVIEW GENERATE

- Receipt Preview
- Check/un-check to choose which receipts to create and email/print
- Drill in to see all gifts included in the receipt

Contributions Included in this Receipt for: Shin Kazama

REF. NO.	GIFT AMT.	PAYMENT DATE	TAX CAMPAIGN	DESIGNATION	FUND	APPEAL	TRANSACTION NO.	TRANSACTION DATE	BATCH
1245	\$1.00	9/2/2022	Example Campaign	[designation]	[example fund]	[appeal]	1245	9/2/2022	[batch]
1246	\$1.00	9/2/2022	Example Campaign	[designation]	[example fund]	[appeal]	1246	9/2/2022	[batch]
1248	\$1.00	9/2/2022	Example Campaign	[designation]	[example fund]	[appeal]	1248	9/2/2022	[batch]

**IN DEVELOPMENT**

CANCEL

- Contributions included in the receipt

Charitable Tax Receipt Set: Set\_1

<input type="checkbox"/>	ID	SALUTATION	COVER LETTER	CHARITABLE TAX RECEIPT	TOTAL GIVING AMOUNT	TAX RECEIPT NO.	DELIVERY CON ...
<input checked="" type="checkbox"/>	1007	Mr. Shin Kaizama	[cvr letter data]	[tax receipt data]	\$200.00	000123	email@mail.com
<input type="checkbox"/>	2001	Mr. Len Pal	[cvr letter data]	[tax receipt data]	\$200.00	000123	email@mail.com
<input type="checkbox"/>	1234	Mr. John Osborn	[cvr letter data]	[tax receipt data]	\$200.00	000123	email@mail.com
<input type="checkbox"/>	2431	Ms. Lisa Frank	[cvr letter data]	[tax receipt data]	\$200.00	000123	email@mail.com
<input type="checkbox"/>	5432	Mr. Mickey Simon	[cvr letter data]	[tax receipt data]	\$200.00	000123	email@mail.com

**IN DEVELOPMENT**

CANCEL SAVE PRINT PREVIEW GENERATE

- Print Preview
- Generate – Saves PDFs to designated storage location
  - We will offer free cloud storage, if you choose to use it, but not currently in Canada

# REPORTS

Proposed

## Charitable Tax Receipt Summary

A summary listing of Charitable Tax Receipts by constituent and giving year

## Charitable Tax Receipt Audit

A list of Charitable Tax Receipts issued within a calendar year, with audit information



- Constituent summary
- Audit report
- Will add more reports, analytics, list criteria, output elements, etc. based on feedback

# BETA TESTING

Phase 1 - v16.0.4



Phase 1 of the Charitable Tax Receipt functionality will be included in v16.0.4



Additional features will roll out in future releases



Charitable Tax Receipt functionality may be implemented at any time during the year



Email [product@tessituranetwork.com](mailto:product@tessituranetwork.com) if you would like to participate in beta testing



- Phase 1 of the functionality will be in v16.0.4, so you must have a non-production server installed with that version to participate
  - For those who will not have a v16.0.4 environment, I'm hoping to get access to a Sandbox environment – but that is not yet confirmed
- As we get closer to the end of the year, I will let you all know what will be included for beta, and what features will roll out in future releases
- We designed this feature so that once we complete beta, you can begin generating tax receipts immediately, even for gifts or pledge payments that have already been processed
- Email me or product@ if you would like to participate in beta testing, but even if you don't participate, I want ALL your feedback so I can make sure we delivery a tool that satisfies the legal requirements and meets your needs

Questions?

