

Donations: How to Cancel an Invalid Tax Receipt

| <i>Speech</i> | <i>Cursor Actions</i> |
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| Sometimes a receipt is issued and it becomes invalid. For example, perhaps you issued a tax receipt for a donation, then realized that the amount of the donation was incorrectly entered into Sumac. Thus, the receipt you created is in error as well. In order to fix this, the receipt needs to be canceled. | Show pic listing examples of when a receipt should be canceled |
| The first thing you should do is find the electronic receipt document wherever it was saved on your server. Once you've found the invalid receipt document, move it into a folder called "Canceled Receipts." | Show pic that outlines each step |
| If you preserve paper copies of receipts, you should also find the paper copy of the invalid receipt, mark the paper copy as "Canceled," then store the copy of the invalid receipt in a separate paper folder. | Show pic that outlines each step? |
| Now that you've taken care of the electronic and paper copies of the invalid receipt, you should cancel the receipt in Sumac. | |
| In your Sumac console, click Fundraising, then click Donations. | Show console. Expand Fundraising. Click Donations |
| Search to find the donation that you need to cancel. For this example, we'll search using the donor's Last Name. | Choose Search Type: Donor Last Name. Type "McKay" and click Search. |
| First, we need to enter a new donation record to replace the old, invalid one. | |
| Select the old, invalid donation, then click Duplicate. | Select old donation. Click Duplicate |
| Sumac makes an exact copy of the old donation record. Open the duplicate and make the necessary changes to correct whatever errors were in the old, invalid donation record. | Double-click new donation record. Make necessary changes to correct it |
| It is a good idea to add a Note in the new donation record to specify that this donation record was created to replace an old receipt. | Enter Note: Donation entered/receipt issued to replace invalid receipt number NNN (NNN=old receipt number) |
| Click OK to save the new donation. | Click OK. |
| Now, create a receipt for the new donation. Expand Mailing, click Make Receipts, and proceed to create the new receipt as usual. | Expand Mailing. Click Make Receipts |
| Once the new receipt has been issued, Sumac will show you the new receipt number. | Point to new receipt number. |
| Once you've issued a correct receipt, find the old, invalid donation record, and double-click to open it. | Find old, invalid donation. Double-click to open it |

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| In the Receipt Numbering area of the donation record, put a check mark next to “Canceled Receipt.” | In Receipt Numbering, put check mark next to “Canceled Receipt” |
| Sumac asks you to confirm this cancellation | Point to confirmation message |
| You may choose to clear the Receipt's Issue Date, or the Receiptable Amount fields from this donation record. | Point to those check boxes |
| Sumac also prompts you to enter a Note on this donation record to explain the reason for canceling this donation. | Point to Note field |
| Notice that Sumac creates a note for you that identifies the user name of the person who canceled the donation, as well as the date this was done. | Point to each section of the note. |
| It also marks that this receipt is “replaced by receipt number NNN” | Point to that section of the note |
| Fill in the new receipt number in the incorrect donation's Notes field here. | Fill in New receipt number |
| Click OK, and notice that Sumac filled all of that information into the Notes field of this donation record. | Point to Notes field. |
| Click OK to save this change. | Click OK. |
| Notice that Sumac shows canceled donations in grey. | |
| <i>Check out more training videos to learn more about Sumac!</i> | |