

## Donations: How to Re-Issue/Make a Copy of a Tax Receipt

<i>Speech</i>	<i>Cursor Actions</i>
Occasionally, donors may lose a receipt that you've sent to him or her. In those situations, you need to send another copy of the receipt.	
If you keep paper copies of the receipts you issue, then photo-copy the receipt that was previously issued send the copy to the donor.	Show pic: 1) If you keep paper copies: photo-copy the receipt
If you do not keep paper copies, but keep <i>electronic</i> copies of the receipts you issue, then print a copy of the saved file.	2) If you keep electronic copies: re-print the receipt
If you do not have paper copies <i>or</i> electronic copies, then you can re-generate the receipt through Sumac.	3) If you do not keep paper <i>or</i> electronic copies: re-generate the receipt using Sumac
Please note that if you are trying to correct a receipt that was issued in error, the following instructions <i>DO NOT</i> apply. Instead, stop this video and watch the training video that explains how to cancel an <i>invalid</i> tax receipt.  If however, you are just trying to make a copy of an old tax receipt, continue following these instructions.	
In your Sumac console, click Fundraising, and Donations.	Show console. Expand fundraising. Click Donations.
Search to find the donation for which you need to re-generate the tax receipt.	
For this example, we'll search by the donor's last name.	Search by Last Name: McKay
Select the donation record for which you need to re-generate the tax receipt.	Point to Receipt number
Expand the Mailing menu, and click Mail Merge	Expand Mailing. Point to Mail Merge
Note: you <i>do not</i> click Make Receipts, since a receipt number has already been assigned to this donation.	Point to Make Receipts. Pause.
	Click Mail Merge
Sumac asks you to choose a template for this mail merge. Choose your tax receipt template.	Choose Tax Receipt Template.
Sumac asks you to choose the Merge Destination to specify where you want to save this file. You may have a folder designated for re-printed receipts, but for this example, I'll choose to save this file to my Desktop	Point to Merge Destination Click Choose File Select Desktop Click Save, then Click OK

<p>Once Sumac runs the mail merge, it asks if you want to save a communication record in the database. You probably do not need to save a communication record, since we're just making a copy of a receipt that was already issued. However, if you want to record a communication to indicate that you reissued this tax receipt, you can.</p>	<p>Click No</p>
<p>Sumac also asks if you want to record that the donation has been acknowledged. Again, because we're just making a copy of a receipt that's already been issued, you likely will not need to do this.</p>	<p>Click No</p>
<p>Now that the mail merge is complete, you can open the resulting document, print it, then send it off to the donor!</p>	<p>Go to Desktop. Open merged document, Click File, point to Print</p>
<p><i>Check out more training videos to learn more about Sumac!</i></p>	