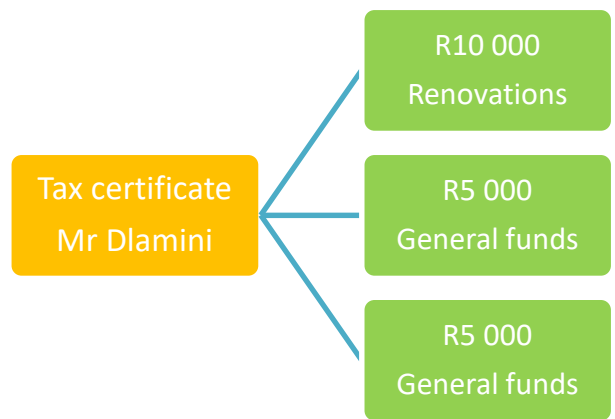


Tax certificate process

A tax certificate is official proof of donations paid by your donors for tax deduction purposes. **DevMan** helps you meet the legal requirements and streamlines the process of issuing and sending multiple tax certificates.

DevMan caters for:

- Consolidated tax certificates
- Once off tax certificates
- Issue multiple tax certificates
- Bulk download or electronic distribution



Key tools

DUE GRID

Collections of transactions ready (due) for processing are conveniently presented in a grid.

BATCH PROCESSING

Process a large number of donations in a batch to generate tax certificates. Issue, print and/or email tax certificates in a few simple steps.

MILESTONES AND WORKFLOW

These are the important steps in the process of issuing tax certificates, monitoring the status and communication. Key milestones are:

- Captured phase - tax certificate is editable, ie transactions can be added, changed and deleted.
- Issued & Printed phase – tax certificate number is allocated and the certificate is locked.

PROFILING

Control which donors receive tax certificates by updating the donor profile once off.

Process

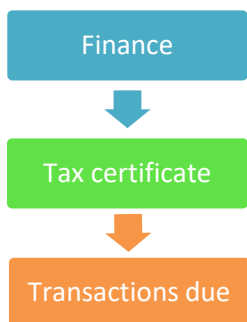
Contact the DevMan support team to set up your tax certificate and covering email template. Templates can be added in multiple languages. (Requires language preference to be set up on contact profiles.). Ensure all donations are captured and allocated to a donor and project.

Then follow these steps:

1. Select the donations to be included in the tax certificate.
2. Issue tax certificates.
3. View and print
4. Electronic distribution or download

Step 1 - Select donations for tax certificate

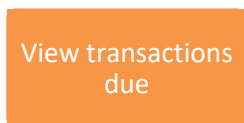
From the main menu select :



This will take you to the donation filter page. Select the criteria of the data required then select:



The page will indicate the number of search results. To view select:



This grid will show all donations not linked to a tax certificate.

The data can be viewed by:

- By donor – summarises all transactions per donor.
- Details – shows the detail of each donation.

Once you have reviewed the transactions you can select donors or transactions (depending on your view) to generate tax certificates:

- Select specific transactions using the checkbox .
- Select all transactions by not selecting any checkboxes.

Step 2 – Issue tax certificates

Once the donations for tax certificate are ticked, select:




This will take you to the bulk update page. Then select:



- This will issue individual tax certificates for each donor.
- Wait for the process to complete before continuing to work on DevMan.
- The status of the tax certificates will automatically be 'Captured'.

View the captured tax certificates by selecting 'Tax certificate' on the Batch generated grid line:

Batch generated

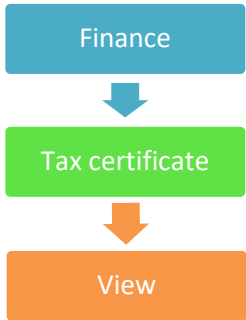
Tax certificate	 2
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PLEASE NOTE

If there is an open tax certificate (in Captured phase) for a specific donor, any donation in the batch with the same donor will automatically be added to the open tax certificate.

Step 3 – View and print

View issued tax certificates as per step 2, or by selecting:



This will take you to the tax certificate grid. Filter the data by using a saved report option or the grid filters.

Select the tax certificates to be printed using the check boxes, then select:



This will take you to the batch processing page.

On the batch processing page select the preferred download format you require the tax certificates in:



PLEASE NOTE

Emailed tax certificates will be attached in the format selected.

For downloaded tax certificates:

Word format: Can only be downloaded as individual files – one per donor

PDF format: Can be downloaded as individual files – one per donor
Or as a single PDF file – single file with all tax certificates

Then select:



This process will do 3 things:

- Update the milestones of all selected tax certificates from 'Issued' to 'Printed'.
- Create a tax certificate activity linked to the donor.
- Generate the tax certificate document in the specified format and attach it to the activity.

The process is complete when the 'Documents generated' grid line reflects the full number generated

Step 4 – Electronic distribution or download

When step 3 is complete the batch page will give you optional actions:

Action to perform: Email View/Download

Email: Generated tax certificates can be emailed in bulk – individual email to each donor with tax certificate attached in the format previously selected.

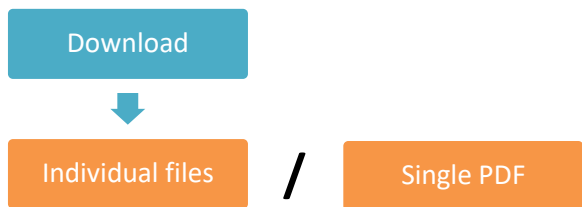
View/Download: Generated tax certificates can be downloaded in the format previously selected.

Email option:

- Select 'Email'
- Select the email template (covering email)
- Change the stationery if required
- 'Email the tax certificates to recipients with email addresses:' Select 'Email' to send.
- A pop up box will confirm the number of emails sent to valid email addresses.
- To view any unsent tax certificates due to invalid or no email address, select the download option once the email step is complete.

Download option:

- Select 'View/Download' – this will take you to the activity grid
- To download the attached tax certificates select:



FAQ

Following are some of the frequently asked questions regarding the tax certificate process:

- Can I indicate which donors receive tax certificates? Yes
- Can I issue a once off tax certificate? Yes
- Can I issue a tax certificate from the donation record? Yes
- Can I add or remove donations on a tax certificate? Yes, only if still in Captured phase.
- Can I revise a printed tax certificate? No
- Can I cancel a tax certificate and issue a new one? Yes
- Can I review / reprint a batch? Yes
- Can I view a tax certificate from the donor profile? Yes
- Can I view / download the individual file generated? Yes

Please contact our support team for training and assistance on these steps.