Canadian Revenue Agency (CRA) Tax Receipts

Version 1.0.8

sparkability group

Plugin Sponsor

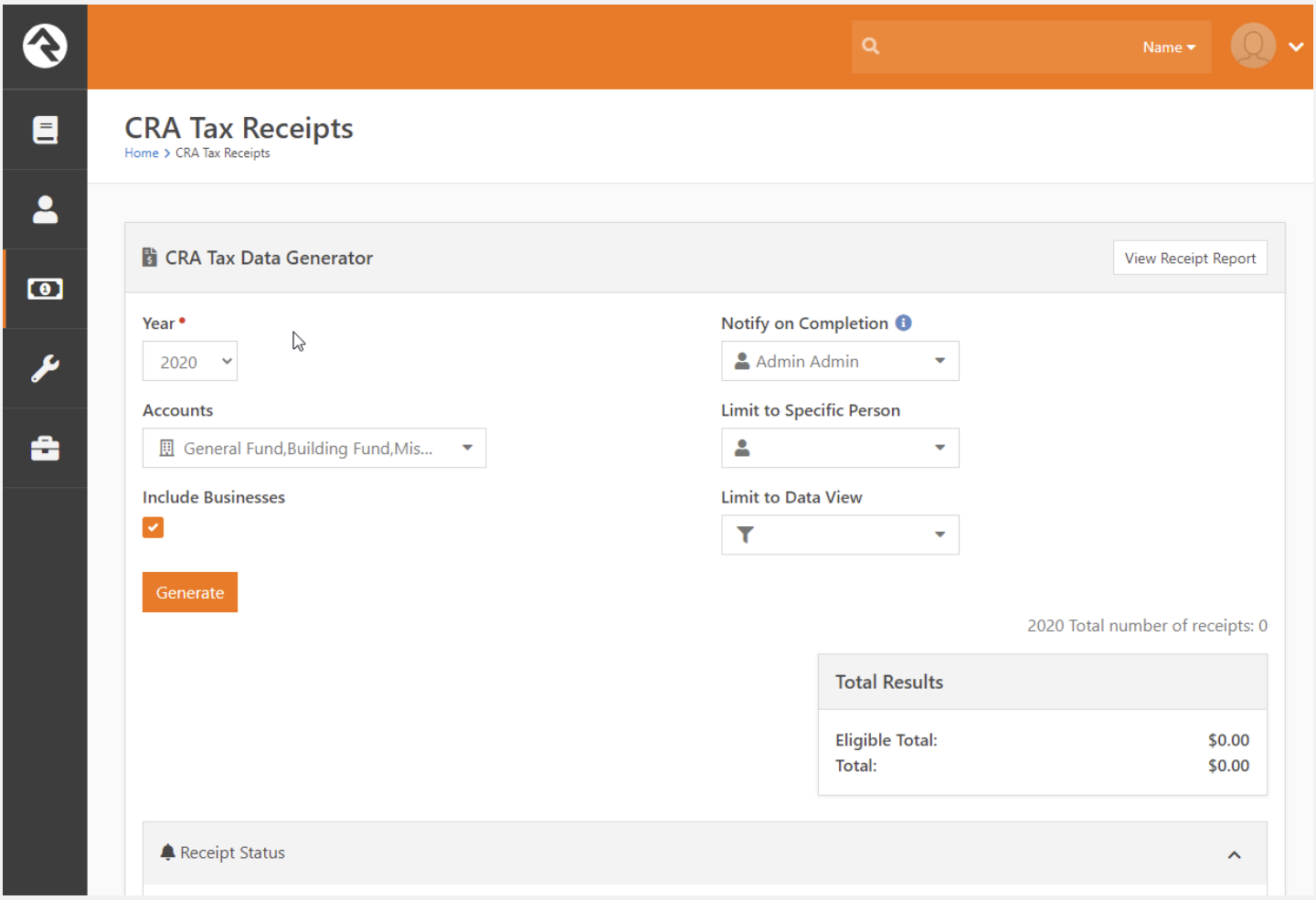
This plugin was created by Sparkability Group through a project funded by Sherwood Park Alliance Church (http://www.spac.ca/). There is no official support for this plugin, other than the amazing Rock community. We hope that continued maintenance and features will be funded by a collection of Canadian churches using Rock.

Introduction

The Canadian Revenue Agency (CRA) has their own set of rules and regulations similar to their US counterpart at the Internal Revenue Service (IRS). This plugin will enable the creation of Canadian Revenue Agency (CRA) approved tax receipts from within Rock. These specialized tax receipts have a serial number, and special rules put into the generator tool that will create new serial numbers and revisions if any of the data is changed after the initial generation.

Generation

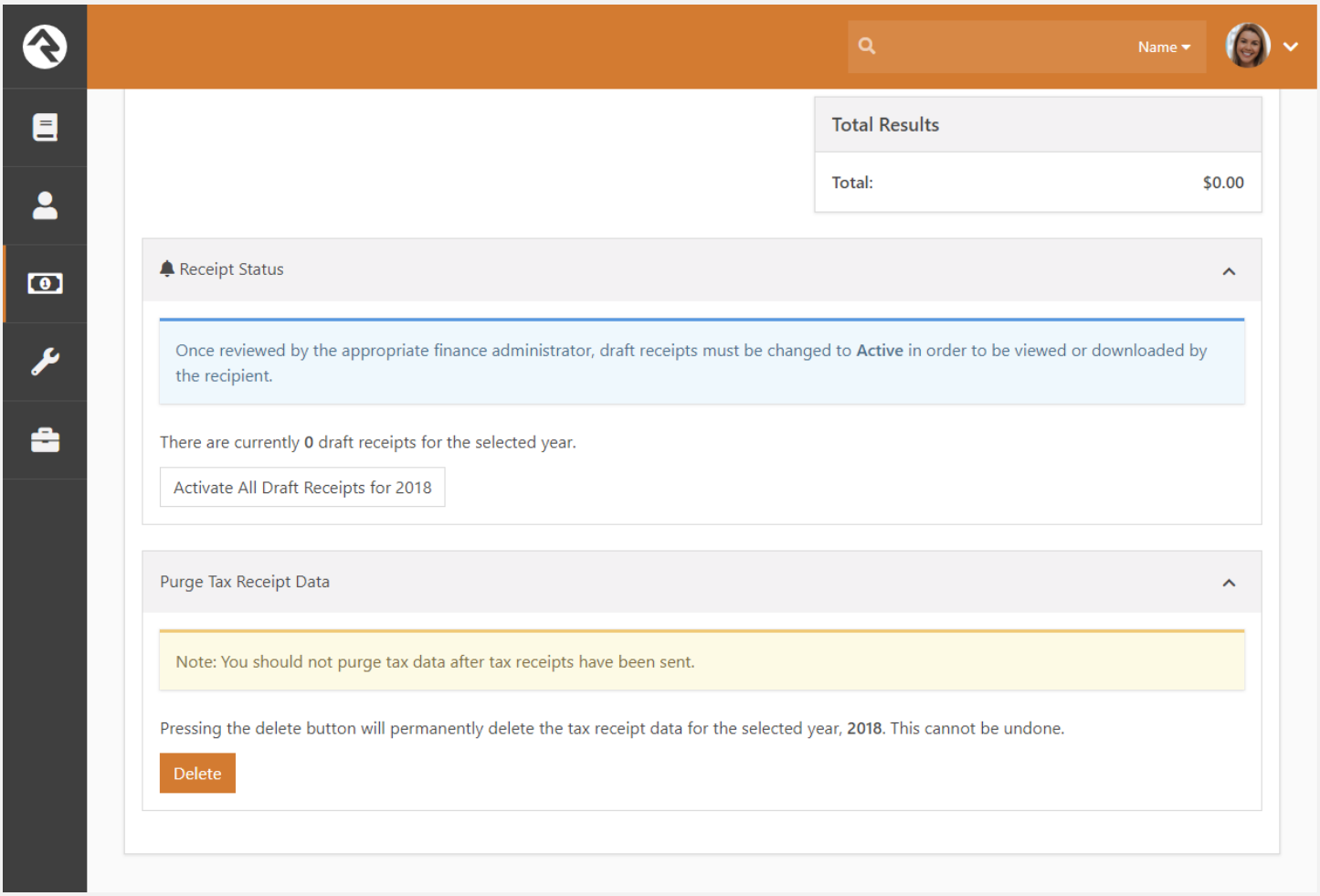
The tool under Finance > Administration > CRA Tax Receipts is used to generate the receipt data necessary for the official CRA Tax Receipts. By default, the tool will select all Accounts that are marked as Tax Deductible; however, the selected account list can be modified if necessary. The generator can be limited to a single person, an entire data view of people, or it can process all financial transaction data for the selected year.



Since the generation process can take quite a bit of time, an email is sent to the person designated in the Notification Person picker once it completes.

The Receipt Status section shows the number of draft receipts for the current year. When receipts are first generated, they have a status of "Draft". Draft receipts are not able to be viewed by contributors and will be deleted if receipts are generated again for the same year. The button "Activate All Draft Receipts for Year" will change the receipt status from "Draft" to "Active". Once receipts are Active contributors will be able to download and view them; and they will not be deleted when more receipts are generated for the same year.

There is also a block setting that, if enabled, allows the tax generator data to be permanently deleted. This should only done during a testing period before any receipts are downloaded by or sent to the recipient.

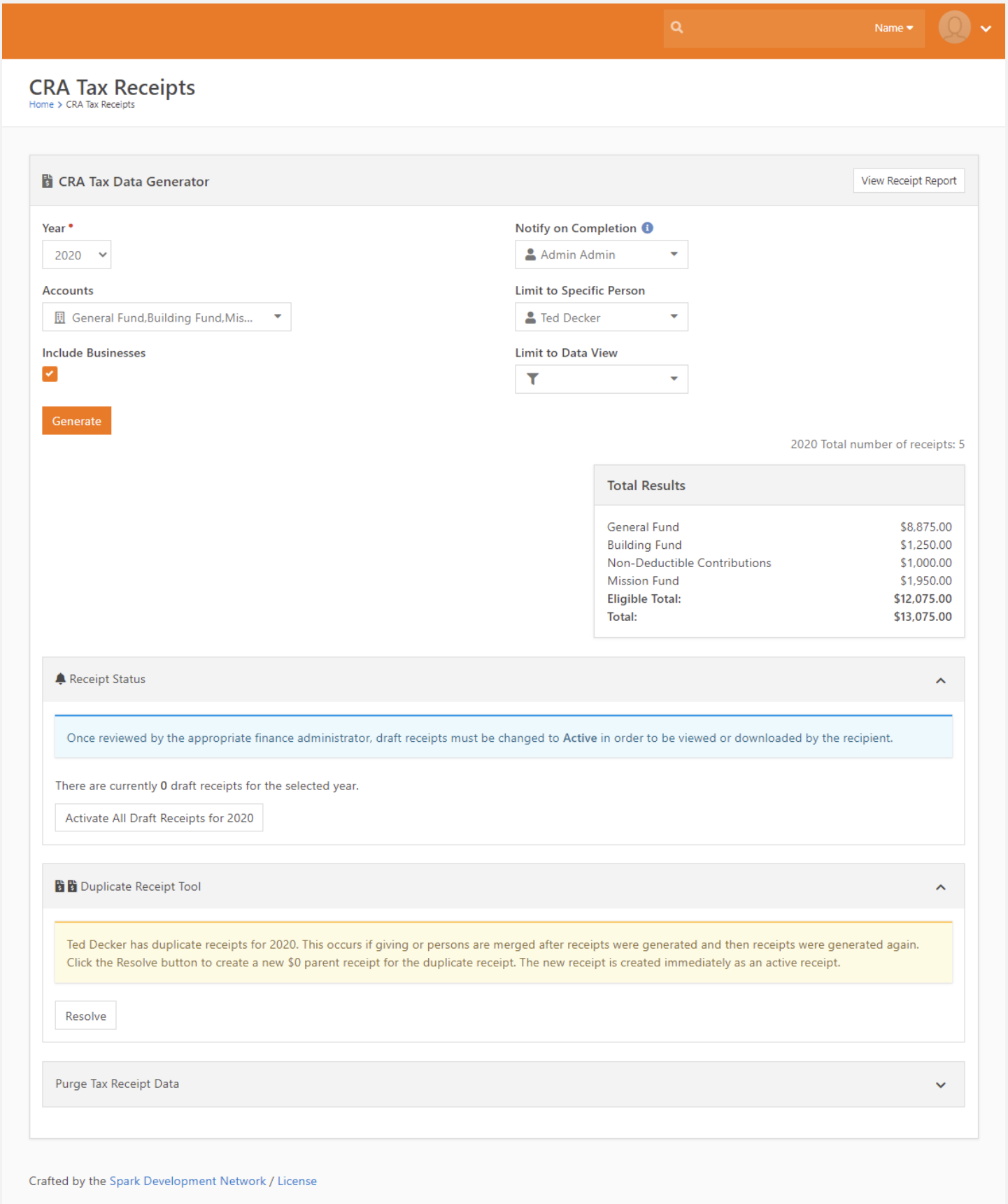


Although the "Total Results" box will show a current summary of the tax receipt data for the selected year, once fully generated, the View Receipt Report button can be used to see a more detailed list of all the receipts for a particular year. Both Active and Draft receipts will be listed.

Duplicate Receipt Tool

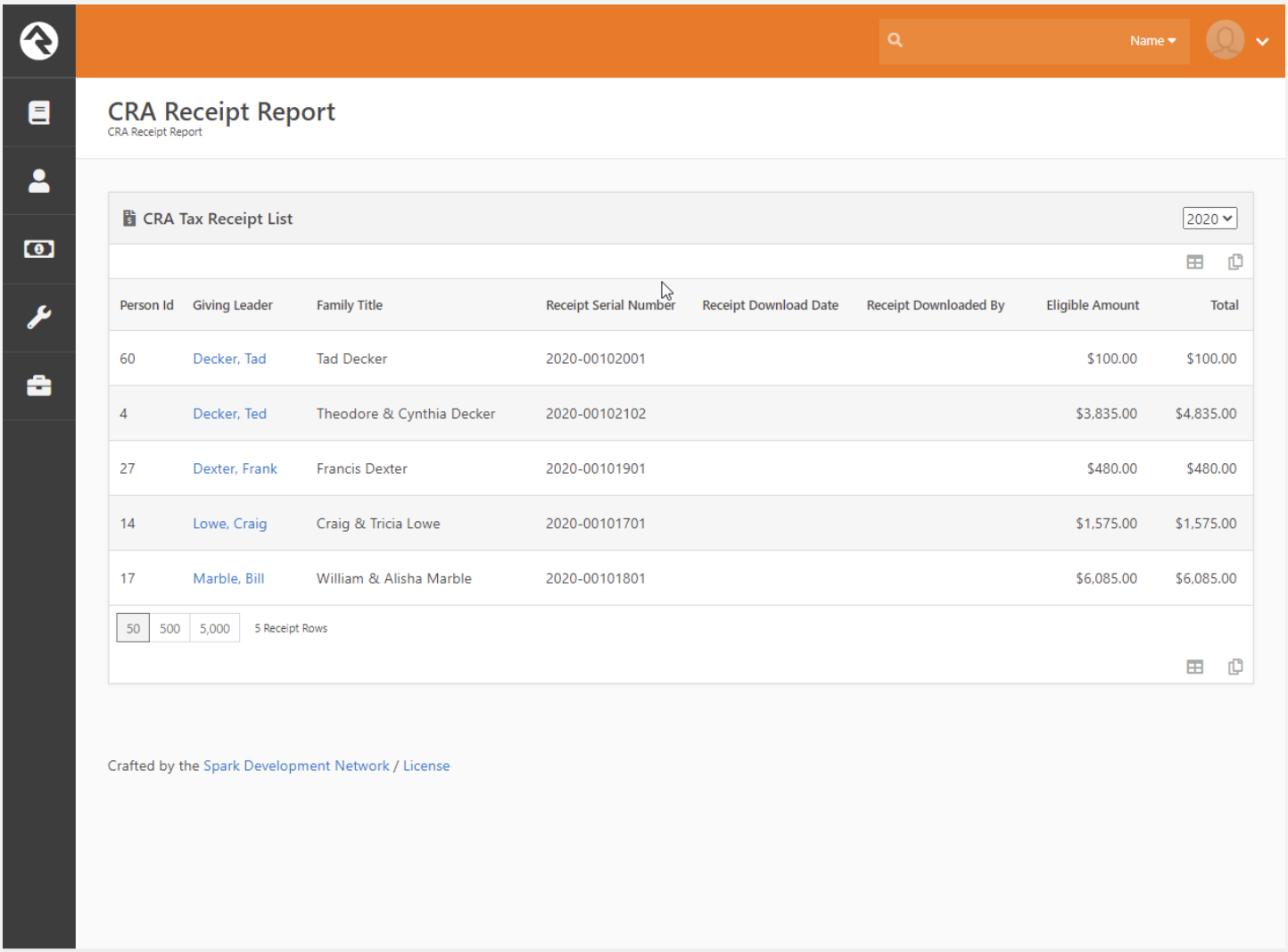
If a person is merged or individual giving is changed to family giving after receipts are generated then duplicate receipts can result. To resolve this a new receipt with a $0 amount needs to be created as a revision of the receipt previously created for the now merged person, or the individual giver.

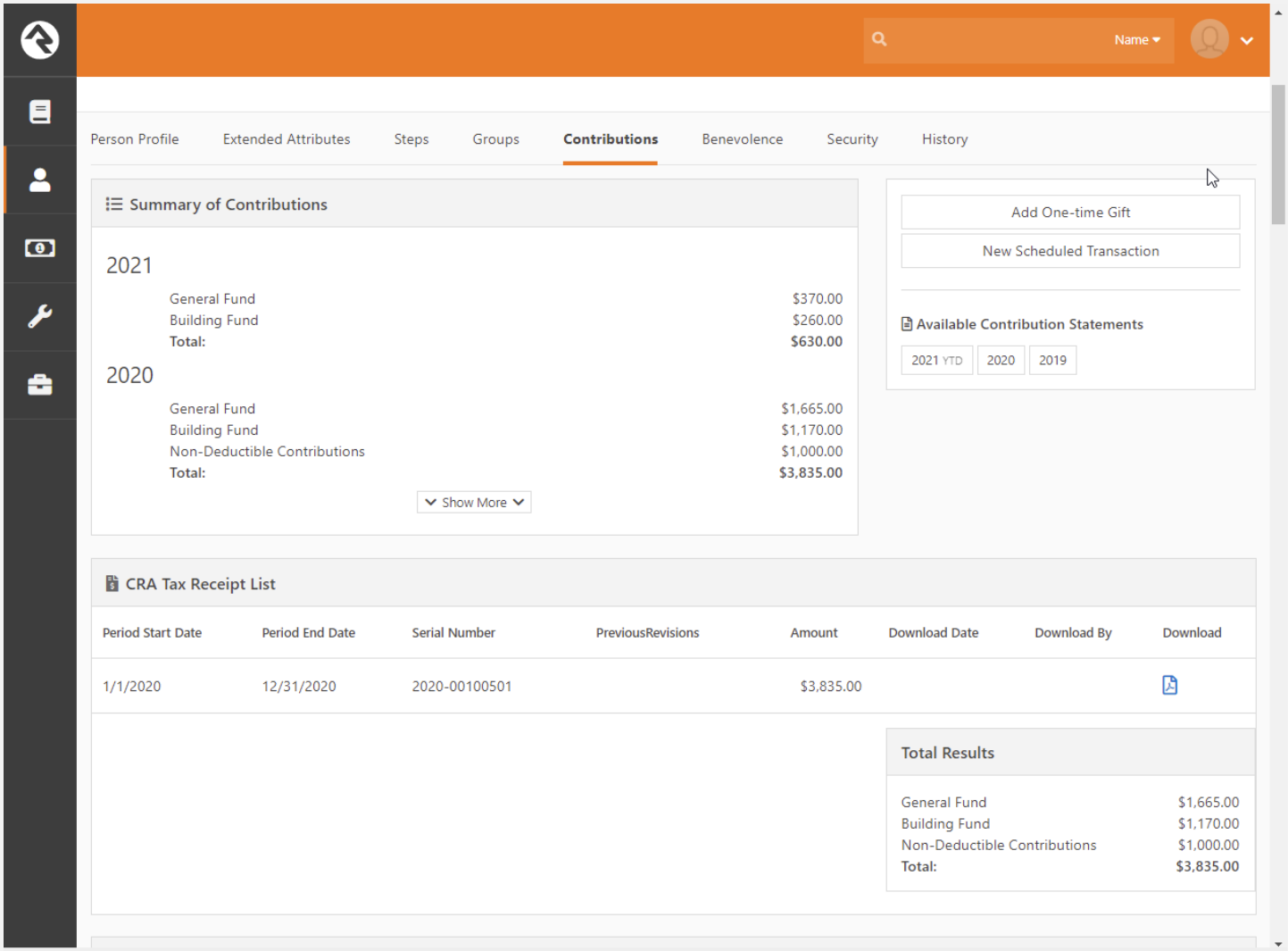
The Duplicate Receipt Tool will appear if an individual is selected for "Limit to Specific Person" and a duplicate receipt exists for the selected person and year. To create a revised receipt, click the "Resolve" button. The new $0 receipt will be created immediately as a revision of the duplicate receipt. After clicking "Resolve" the Duplicate Receipt Tool will disappear if successful and a message will display at the top of the screen.


Name
CRA Tax Receipts
Home > CRA Tax Receipts
CRA Tax Data Generator
View Receipt Report
Year *
2020
Notify on Completion
Admin Admin
Accounts
General Fund,Building Fund,Mis...
Limit to Specific Person
Ted Decker
Include Businesses
Limit to Data View
Generate
2020 Total number of receipts: 5
Total Results
General Fund $8,875.00
Building Fund $1,250.00
Non-Deductible Contributions $1,000.00
Mission Fund $1,950.00
Eligible Total: $12,075.00
Total: $13,075.00
Receipt Status
Once reviewed by the appropriate finance administrator, draft receipts must be changed to Active in order to be viewed or downloaded by the recipient.
There are currently 0 draft receipts for the selected year.
Activate All Draft Receipts for 2020
Duplicate Receipt Tool
Ted Decker has duplicate receipts for 2020. This occurs if giving or persons are merged after receipts were generated and then receipts were generated again. Click the Resolve button to create a new $0 parent receipt for the duplicate receipt. The new receipt is created immediately as an active receipt.
Resolve
Purge Tax Receipt Data
Crafted by the Spark Development Network / License

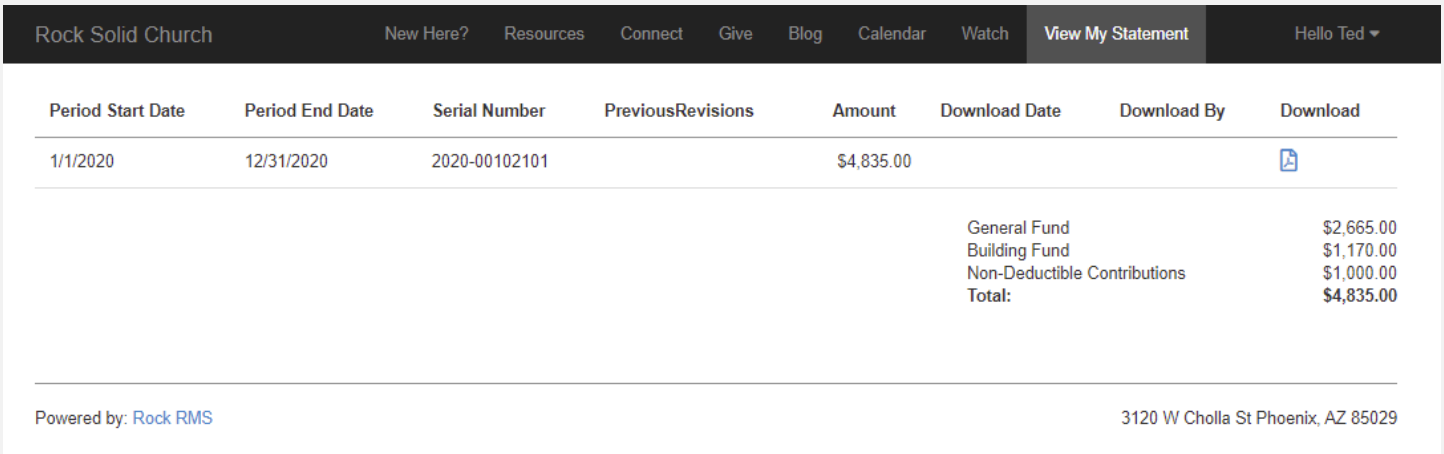
Viewing Receipts

Once the tax receipt data is ready, a receipt will appear in a new panel called CRA Tax Receipt List at the bottom of the page under the Contributions tab. Only Active receipts are shown, Draft receipts will not be included.



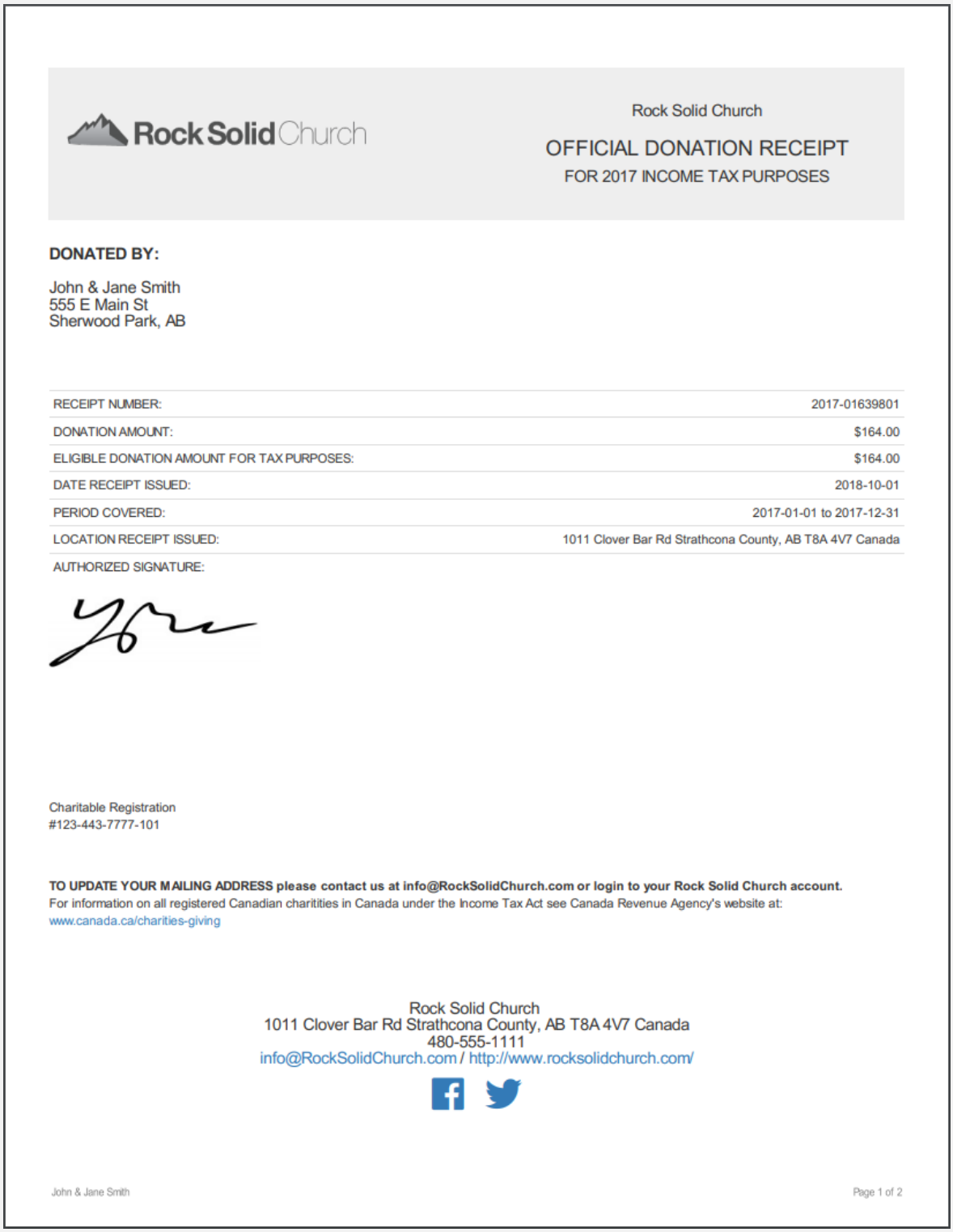


Clicking on the PDF icon will download the file and record who and when it was downloaded. This block can also be put into the public facing website in order for users to retrieve and download their own tax receipts.



Cover Sheet

The tax receipt includes a cover sheet with details required by the CRA. Information on how to customize the details of the cover sheet can be found in the Configuration section.



Rock Solid Church

OFFICIAL DONATION RECEIPT

FOR 2017 INCOME TAX PURPOSES

DONATED BY:

John & Jane Smith
555 E Main St
Sherwood Park, AB

RECEIPT NUMBER:	2017-01639801
DONATION AMOUNT:	$164.00
ELIGIBLE DONATION AMOUNT FOR TAX PURPOSES:	$164.00
DATE RECEIPT ISSUED:	2018-10-01
PERIOD COVERED:	2017-01-01 to 2017-12-31
LOCATION RECEIPT ISSUED:	1011 Clover Bar Rd Strathcona County, AB T8A 4V7 Canada
AUTHORIZED SIGNATURE:	

Charitable Registration
#123-443-7777-101

TO UPDATE YOUR MAILING ADDRESS please contact us at info@RockSolidChurch.com or login to your Rock Solid Church account.
For information on all registered Canadian charitities in Canada under the Income Tax Act see Canada Revenue Agency's website at:
www.canada.ca/charities-giving

Rock Solid Church
1011 Clover Bar Rd Strathcona County, AB T8A 4V7 Canada
480-555-1111
info@RockSolidChurch.com / http://www.rocksolidchurch.com/

John & Jane Smith

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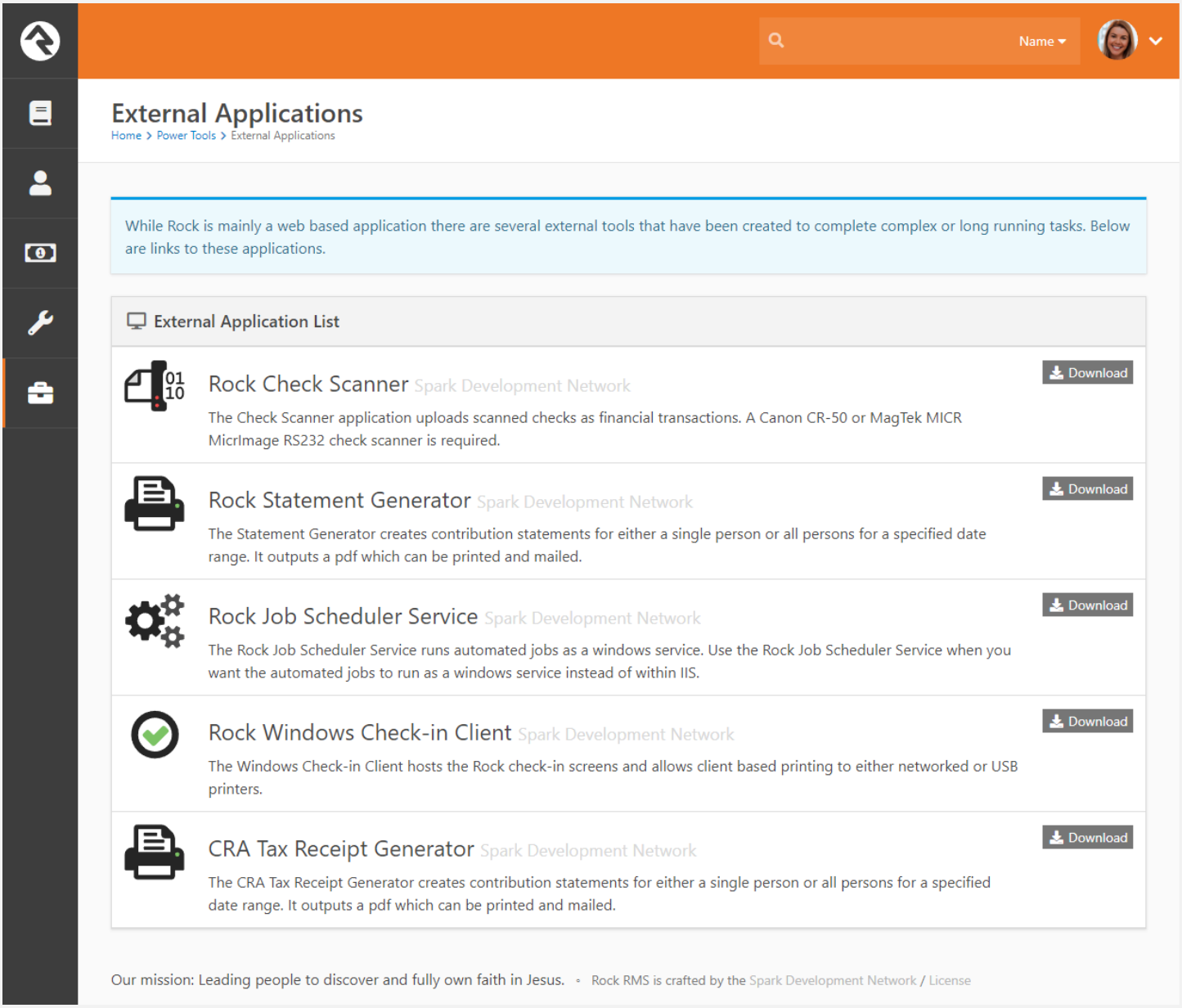
Receipt Generation Tool

The CRA Tax Receipt Generator Windows application can also be run from the administrator's workstation. It can be found under the Admin Tools > Power Tools > External Applications list.



This Windows application will connect to your Rock server to build and store the CRA tax receipts locally on the workstation, which may be ideal if the receipts are being printed from the workstation.

Using the Statement Generator Software

You can refer to the instructions found in the Rock Solid Finances guide as they are nearly identical to the standard version:
https://www.rockrms.com/Rock/BookContent/15/104#installingthestatementgeneratorsoftware

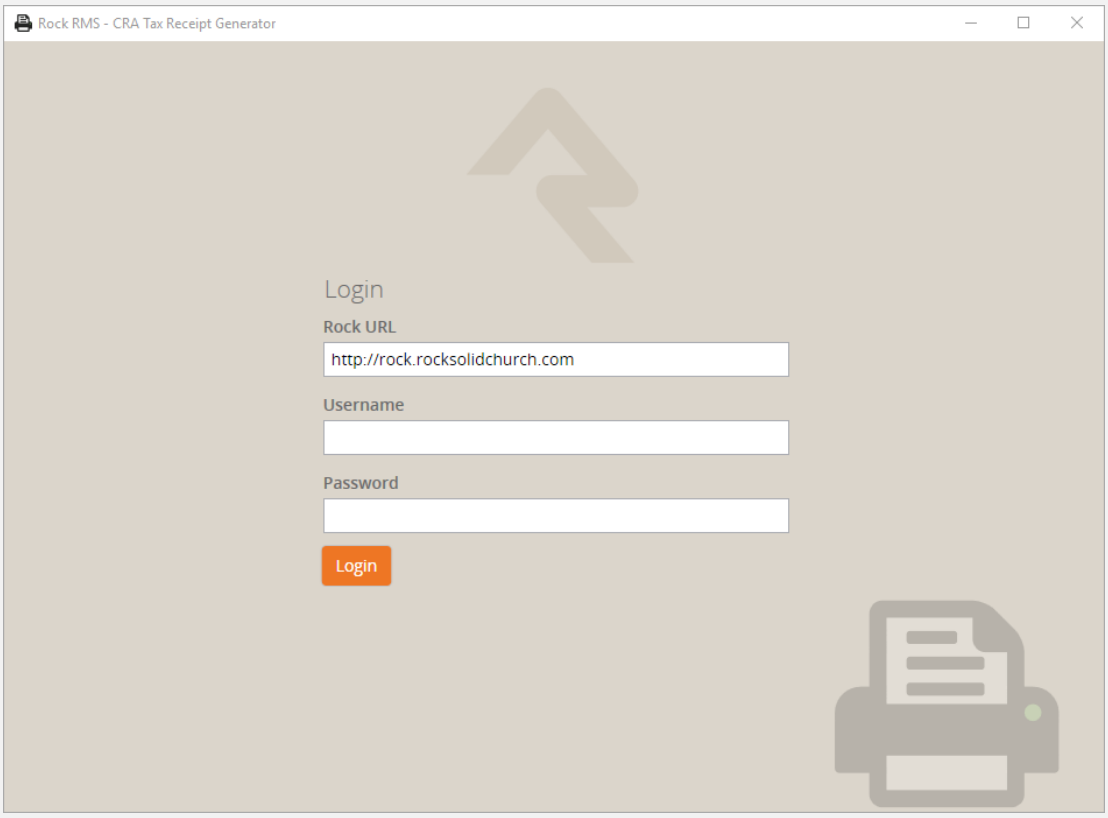
Once you have it set up, it's pretty simple to operate the statement generator software.

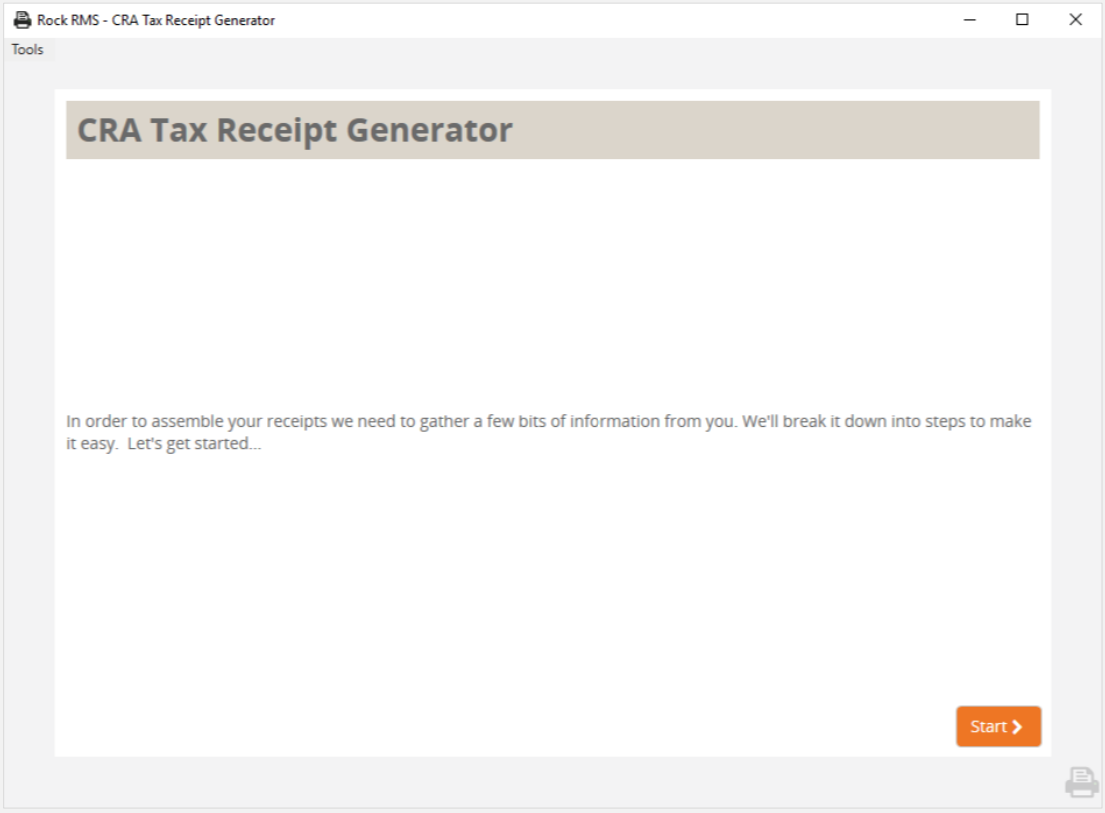
Start by launching it and logging in. Users must be a member of one of the groups below to log in with this software:

- *RSR - Finance Administration*
- *RSR - Finance Worker*

- *RSR - Rock Administration*

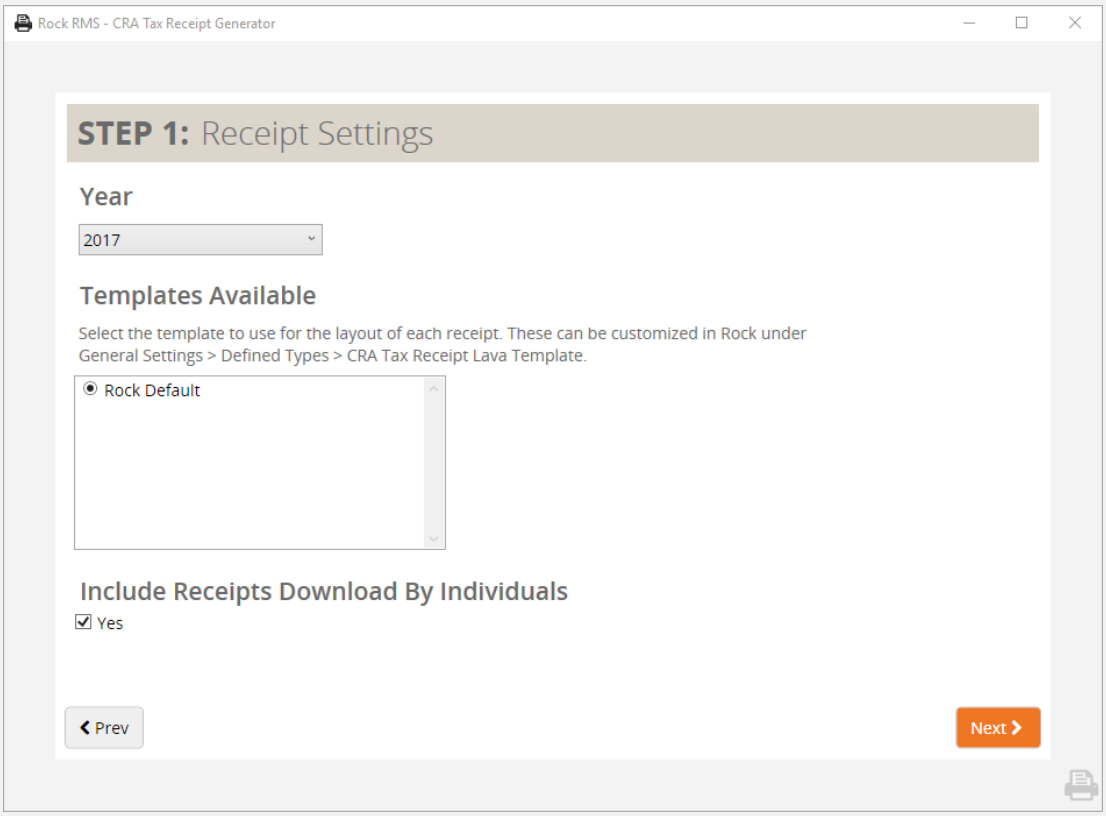
Please note that if this is your first time logging in, you'll also be asked for the web address of your Rock server.



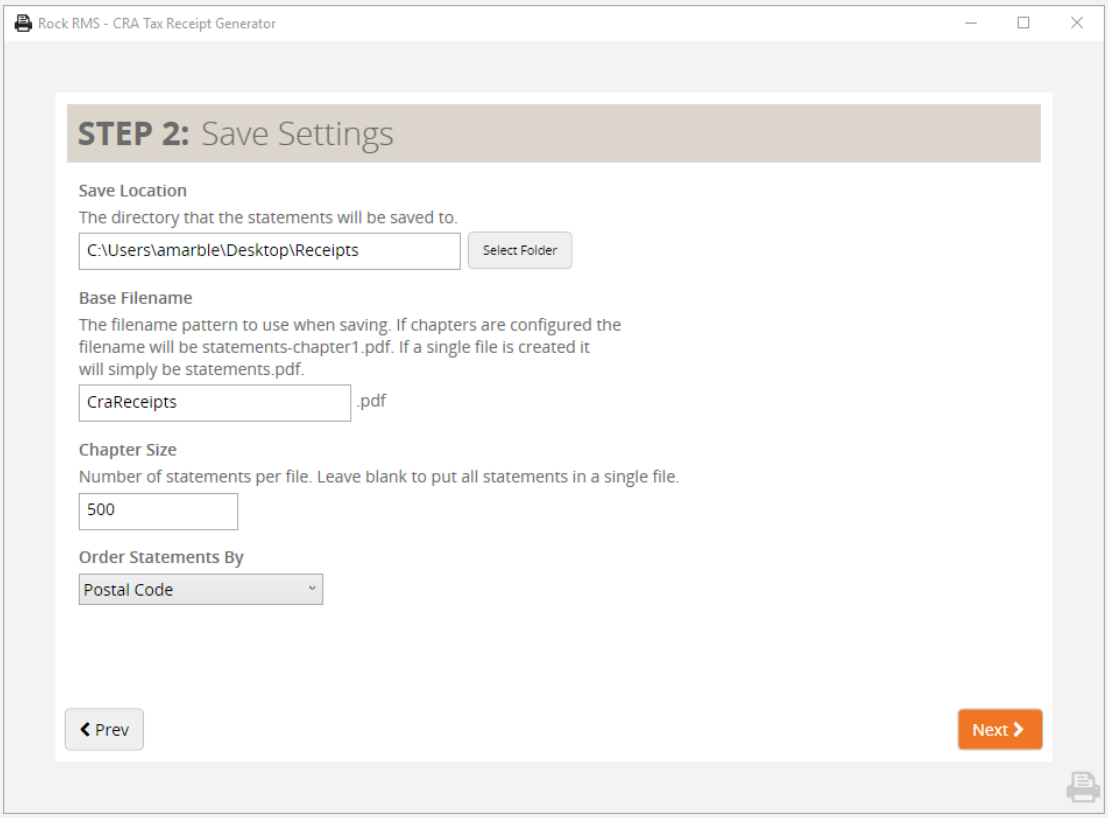


The Receipt Settings screen is where you specify the year and the template for the statements you want to generate. The plugin ships with one default template, which you can customize with your own logo, wording, etc. You can also create your

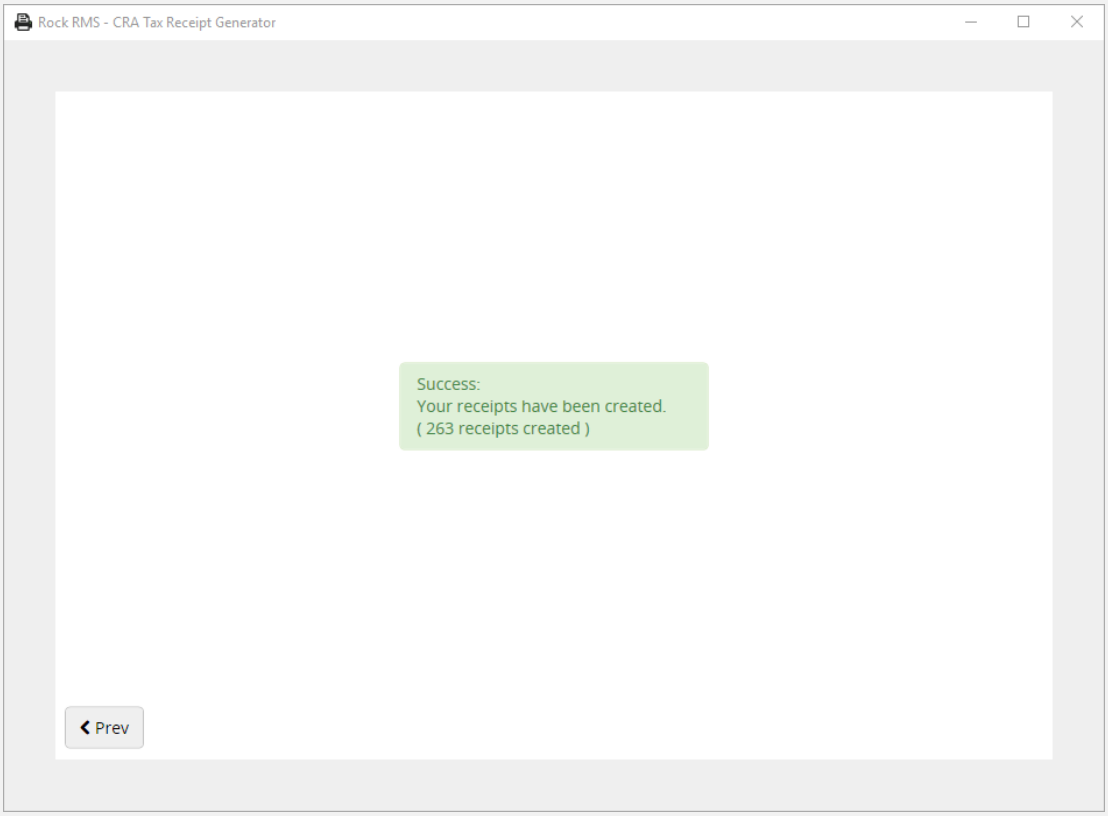
own. The CRA Tax Receipt Lava Templates are located in Defined Types (Admin Tools > General Settings > Defined Types). You can also exclude printing receipts that have already been downloaded by unchecking the Include Receipts Downloaded By Individuals checkbox.



The Save Settings screen allows you to choose the location where you want to save the statements, as well as designate a base filename pattern to use when saving. You can also choose to break up the statements into chapters by entering the number of statements you want to include per chapter in the Chapter Size field. If you leave this field blank, all of the statements will be compiled into a single file.



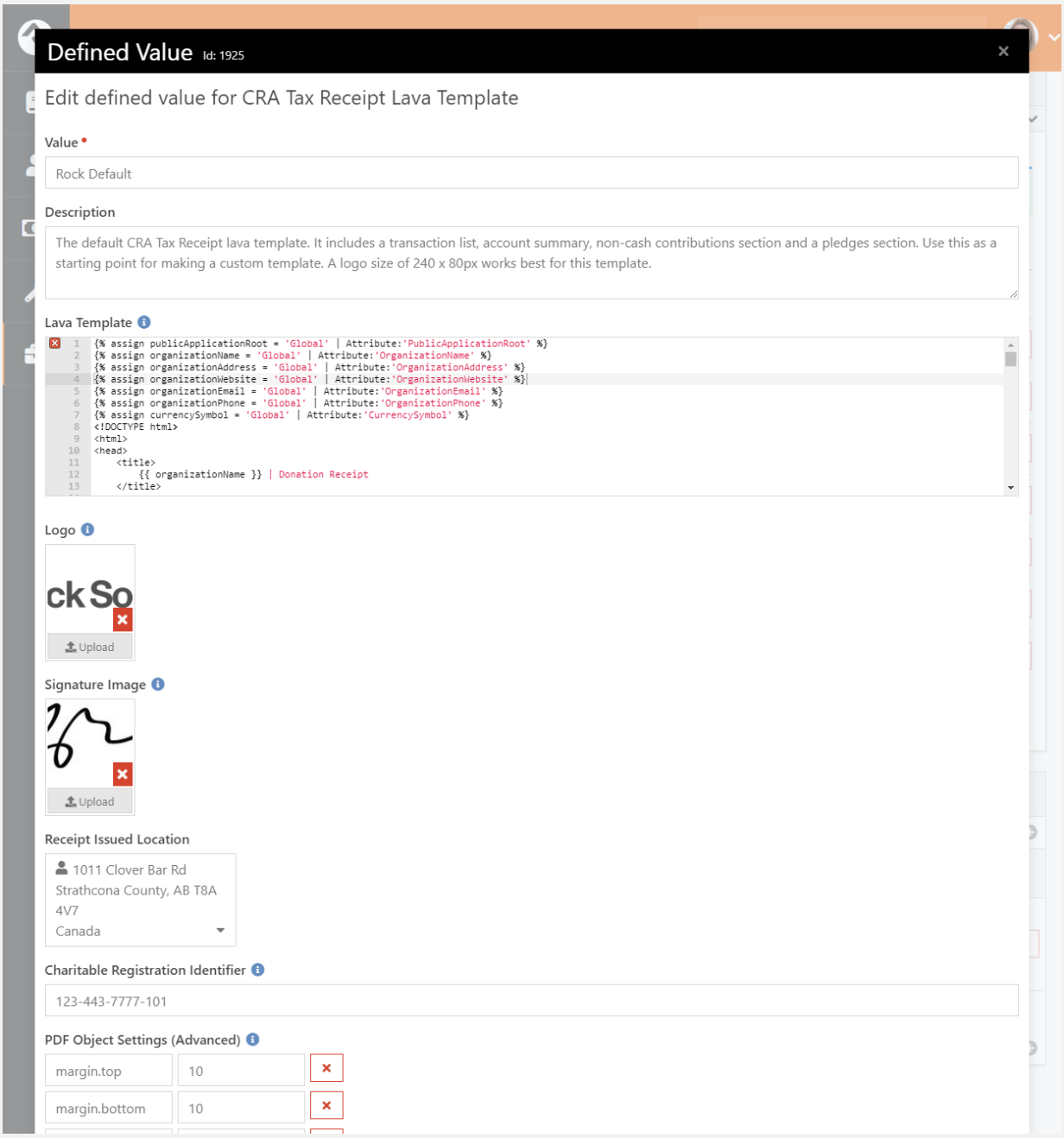
The statement generator will start to process the statements after you press Next. When the process is complete, the generator will display a Success message with the number of statements generated.



Template Configuration

The receipts are formatted using a customizable Lava template found under Admin Tools > General Settings > Defined Types. A new item called CRA Tax Receipt Lava Template should be seen in the list. Most values for that appear on the cover sheet come from the Organization's Name, Address, Phone, Email and website settings, however some of them can be found in the template including:

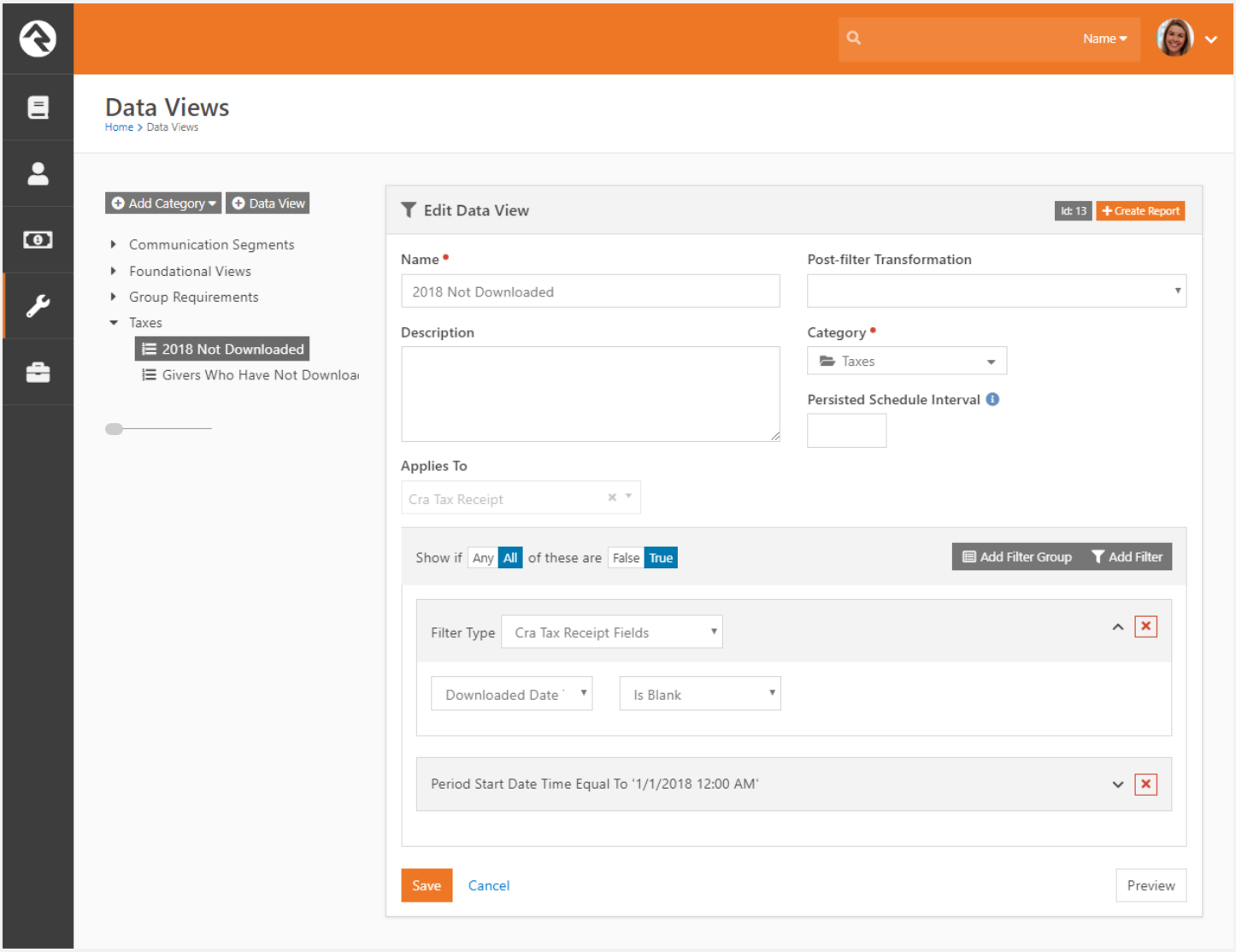
- *Logo – the church/organization logo shown on the header of the tax receipt cover sheet.*
- *Signature Image – the image of the signature of an individual authorized by the charity to acknowledge gifts.*
- *Receipt Issued Location – the address shown on the cover sheet of the tax receipt indicates where the receipt was issued.*
- *Charitable Registration Identifier – the registration number issued by the CRA.*



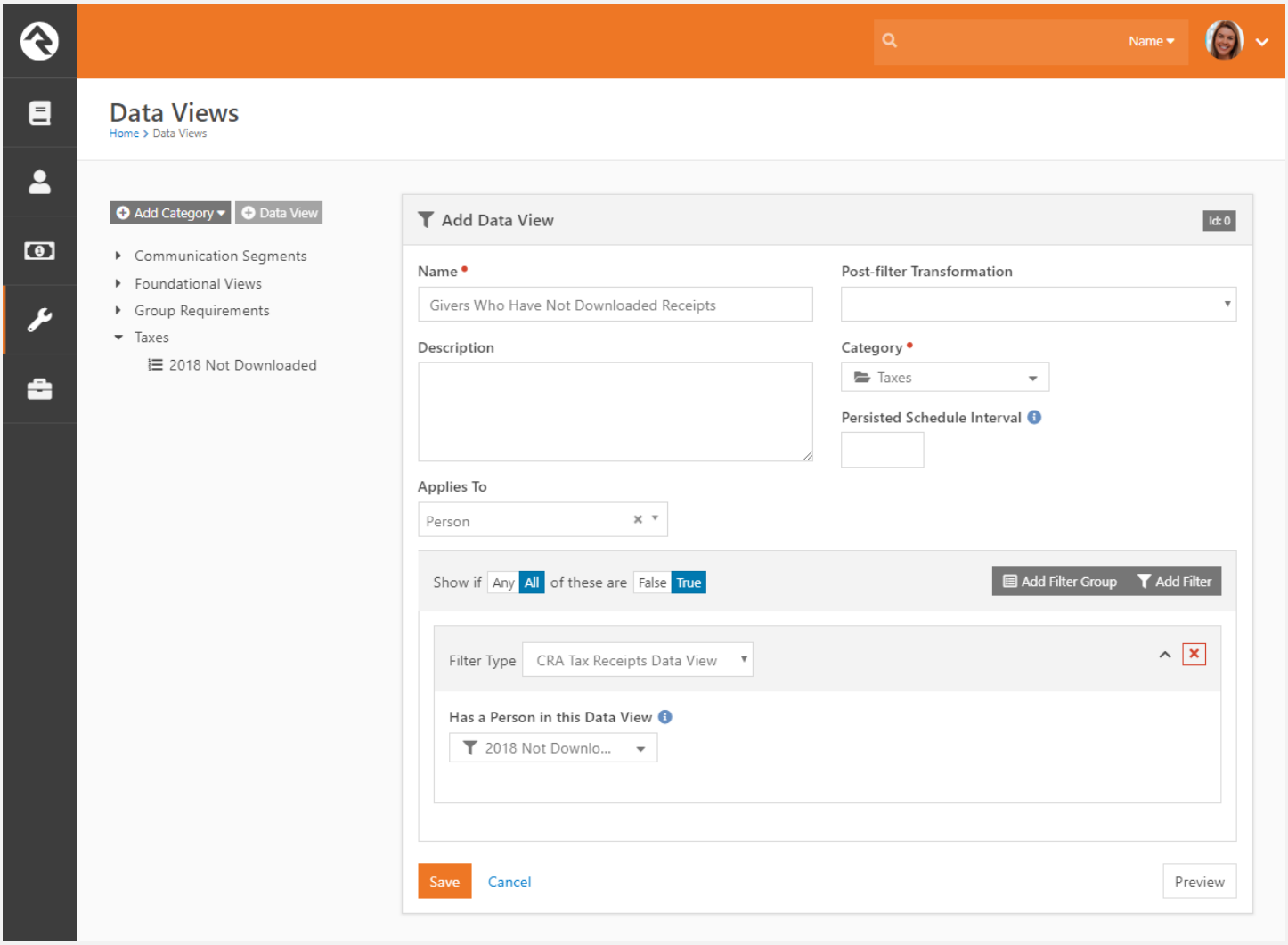
A few of the other settings control the PDF page margins and paper size.

*If you need a **person** report based on CRA Tax Receipt data, you can use the "CRA Tax Receipts Data View" filter type to extract the giving leader (head of household) out of a CRA Tax Receipt data view.*

For example, let's say you wanted a list of all people who have not downloaded their 2018 Tax Receipt. First, create a data view that applies to "CRA Tax Receipt" where the Downloaded Date is blank and where the Period Start Date is equal to 1/1/2018.



Next, create a data view that applies to Person and use the "CRA Tax Receipts Data View" filter type selecting the data view you just created as shown here:



That will produce a list of the giving leaders (head of household) you are looking for.