

Canadian Revenue Agency (CRA) Tax Receipts

Version 1.0.8

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.

The screenshot shows the 'CRA Tax Receipts' interface. At the top, there is a navigation bar with a search icon and a user profile icon. Below this, the main header reads 'CRA Tax Receipts' with a breadcrumb 'Home > CRA Tax Receipts'. The main content area is titled 'CRA Tax Data Generator' and includes a 'View Receipt Report' button. The form contains several sections: 'Year' (set to 2020), 'Accounts' (set to 'General Fund, Building Fund, Mis...'), 'Include Businesses' (checked), 'Notify on Completion' (set to 'Admin Admin'), 'Limit to Specific Person' (set to a person icon), and 'Limit to Data View' (set to a funnel icon). A 'Generate' button is located below the 'Include Businesses' section. To the right of the form, it states '2020 Total number of receipts: 0'. Below this, a 'Total Results' table shows 'Eligible Total: \$0.00' and 'Total: \$0.00'. At the bottom of the form, there is a 'Receipt Status' section with an upward arrow.

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 be done during a testing period before any receipts are downloaded by or sent to the recipient.

The screenshot displays a software interface with a dark sidebar on the left containing navigation icons. The main content area is divided into several sections:

- Total Results:** A summary box showing a total of \$0.00.
- Receipt Status:** A section with a bell icon and an upward arrow. It contains a light blue informational box stating: "Once reviewed by the appropriate finance administrator, draft receipts must be changed to **Active** in order to be viewed or downloaded by the recipient." Below this, it says "There are currently 0 draft receipts for the selected year." and includes a button labeled "Activate All Draft Receipts for 2018".
- Purge Tax Receipt Data:** A section with an upward arrow. It features a yellow warning box: "Note: You should not purge tax data after tax receipts have been sent." Below the warning, it states: "Pressing the delete button will permanently delete the tax receipt data for the selected year, 2018. This cannot be undone." and includes a red "Delete" button.

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.



CRA Tax Receipts

Home > CRA Tax Receipts

CRA Tax Data Generator

[View Receipt Report](#)

Year *

2020 ▾

Accounts

General Fund, Building Fund, Mis... ▾

Include Businesses

[Generate](#)

Notify on Completion ⓘ

Admin Admin ▾

Limit to Specific Person

Ted Decker ▾

Limit to Data View

Y ▾

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

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.

The screenshot shows a web application interface for viewing CRA receipts. At the top, there is a navigation bar with a home icon, a search bar, and a user profile icon. Below this is a sidebar with icons for home, menu, user, search, settings, and a briefcase. The main content area is titled "CRA Receipt Report" and contains a "CRA Tax Receipt List" table for the year 2020. The table has columns for Person Id, Giving Leader, Family Title, Receipt Serial Number, Receipt Download Date, Receipt Downloaded By, Eligible Amount, and Total. Five rows of data are visible, each representing a different giving leader and their family title. At the bottom of the table, there are pagination controls showing 50, 500, and 5,000 rows, with "5 Receipt Rows" currently displayed. The footer of the page states "Crafted by the Spark Development Network / License".

Person Id	Giving Leader	Family Title	Receipt Serial Number	Receipt Download Date	Receipt Downloaded By	Eligible Amount	Total
60	Decker, Tad	Tad Decker	2020-00102001			\$100.00	\$100.00
4	Decker, Ted	Theodore & Cynthia Decker	2020-00102102			\$3,835.00	\$4,835.00
27	Dexter, Frank	Francis Dexter	2020-00101901			\$480.00	\$480.00
14	Lowe, Craig	Craig & Tricia Lowe	2020-00101701			\$1,575.00	\$1,575.00
17	Marble, Bill	William & Alisha Marble	2020-00101801			\$6,085.00	\$6,085.00

Person Profile Extended Attributes Steps Groups **Contributions** Benevolence Security History

Summary of Contributions

Year	General Fund	Building Fund	Total
2021	\$370.00	\$260.00	\$630.00
2020	\$1,665.00	\$1,170.00	\$3,835.00

▼ Show More ▼

CRA Tax Receipt List

Period Start Date	Period End Date	Serial Number	PreviousRevisions	Amount	Download Date	Download By	Download
1/1/2020	12/31/2020	2020-00100501		\$3,835.00			

Total Results

General Fund	\$1,665.00
Building Fund	\$1,170.00
Non-Deductible Contributions	\$1,000.00
Total:	\$3,835.00

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.

Rock Solid Church [New Here?](#) [Resources](#) [Connect](#) [Give](#) [Blog](#) [Calendar](#) [Watch](#) **View My Statement** [Hello Ted](#) ▼

Period Start Date	Period End Date	Serial Number	PreviousRevisions	Amount	Download Date	Download By	Download
1/1/2020	12/31/2020	2020-00102101		\$4,835.00			

General Fund	\$2,665.00
Building Fund	\$1,170.00
Non-Deductible Contributions	\$1,000.00
Total:	\$4,835.00

Powered by: [Rock RMS](#) 3120 W Cholla St Phoenix, AZ 85029

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 charities 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	Page 1 of 2

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>

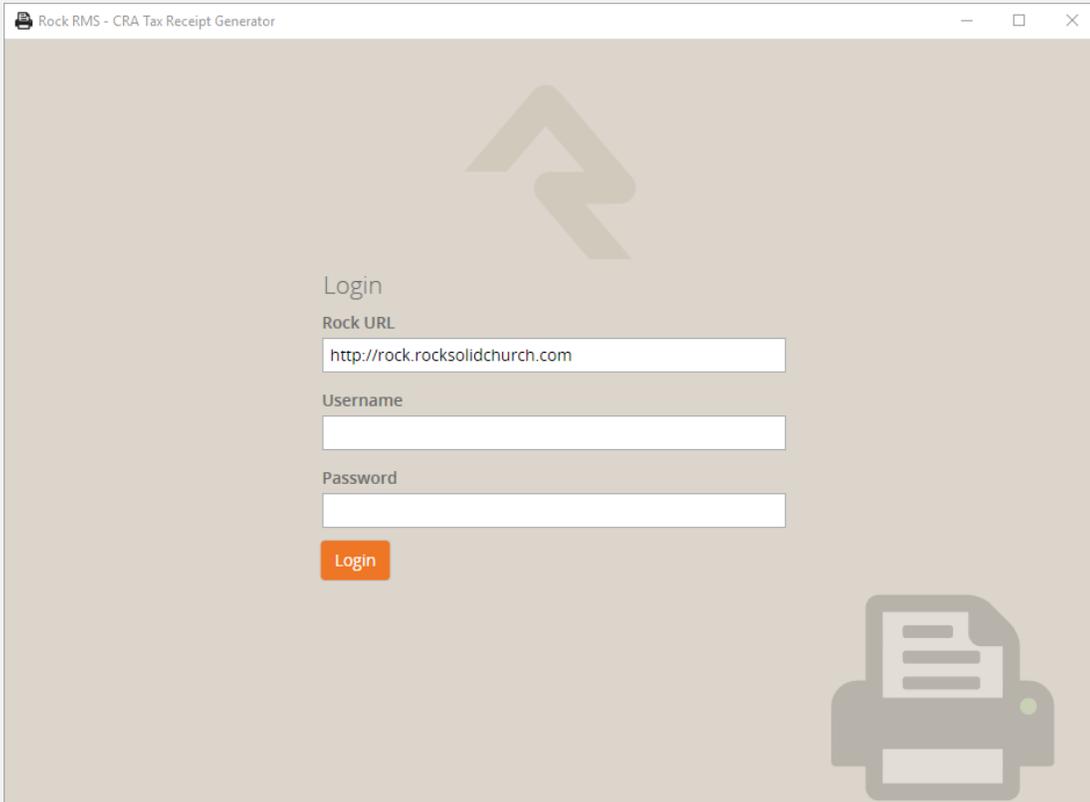
Once you have it set up, it's pretty simple to operate the statement generator software.

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

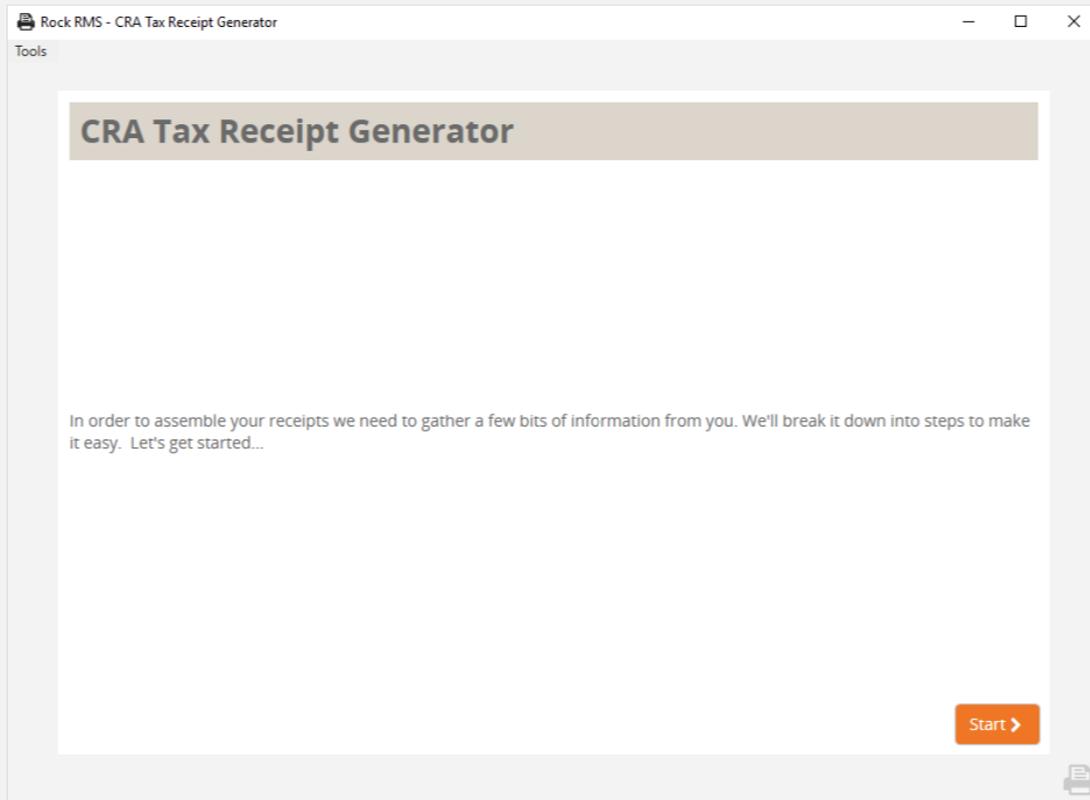
- RSR - Finance Administration
- RSR - Finance Worker

- 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 screenshot shows a web browser window titled "Rock RMS - CRA Tax Receipt Generator". The page has a light beige background with a large, faint logo in the center. Below the logo, the word "Login" is displayed. Underneath, there are three input fields: "Rock URL" containing "http://rock.rocksolidchurch.com", "Username", and "Password". An orange "Login" button is positioned below the password field. In the bottom right corner, there is a grey icon of a printer with a document sheet.



The screenshot shows a web browser window titled "Rock RMS - CRA Tax Receipt Generator" with a "Tools" tab selected. The main content area features a header "CRA Tax Receipt Generator" in a dark grey box. Below the header, there is a paragraph of text: "In order to assemble your receipts we need to gather a few bits of information from you. We'll break it down into steps to make it easy. Let's get started...". At the bottom right of the content area, there is an orange "Start >" button. A small printer icon is visible in the bottom right corner of the browser window.

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 screenshot shows a web application window titled "Rock RMS - CRA Tax Receipt Generator". The main content area is titled "STEP 1: Receipt Settings". It contains the following elements:

- Year:** A dropdown menu currently set to "2017".
- Templates Available:** A section with the instruction: "Select the template to use for the layout of each receipt. These can be customized in Rock under General Settings > Defined Types > CRA Tax Receipt Lava Template." Below this is a list box containing one item, "Rock Default", which is selected with a radio button.
- Include Receipts Download By Individuals:** A checkbox labeled "Yes" which is checked.
- Navigation:** A "Prev" button with a left arrow and a "Next" button with a right arrow.
- Footer:** A small printer icon in the bottom right corner.

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.

Rock RMS - CRA Tax Receipt Generator

STEP 2: Save Settings

Save Location
The directory that the statements will be saved to.

Base Filename
The filename pattern to use when saving. If chapters are configured the filename will be statements-chapter1.pdf. If a single file is created it will simply be statements.pdf.

.pdf

Chapter Size
Number of statements per file. Leave blank to put all statements in a single file.

Order Statements By



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.

Rock RMS - CRA Tax Receipt Generator

Success:
Your receipts have been created.
(263 receipts created)

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.

The screenshot shows the configuration interface for a 'Defined Value' with ID 1925. The title is 'Edit defined value for CRA Tax Receipt Lava Template'. The 'Value' field contains 'Rock Default'. The 'Description' field contains: 'The default CRA Tax Receipt lava template. It includes a transaction list, account summary, non-cash contributions section and a pledges section. Use this as a starting point for making a custom template. A logo size of 240 x 80px works best for this template.' The 'Lava Template' field contains a code snippet for a donation receipt template. The 'Logo' field shows a placeholder for 'ck So' with an 'Upload' button. The 'Signature Image' field shows a handwritten signature with an 'Upload' button. The 'Receipt Issued Location' field contains the address: '1011 Clover Bar Rd, Strathcona County, AB T8A 4V7, Canada'. The 'Charitable Registration Identifier' field contains '123-443-7777-101'. The 'PDF Object Settings (Advanced)' section includes 'margin.top' and 'margin.bottom' both set to 10.

Defined Value Id: 1925

Edit defined value for CRA Tax Receipt Lava Template

Value *

Rock Default

Description

The default CRA Tax Receipt lava template. It includes a transaction list, account summary, non-cash contributions section and a pledges section. Use this as a starting point for making a custom template. A logo size of 240 x 80px works best for this template.

Lava Template

```
1 {% assign publicApplicationRoot = 'Global' | Attribute:'PublicApplicationRoot' %}
2 {% assign organizationName = 'Global' | Attribute:'OrganizationName' %}
3 {% assign organizationAddress = 'Global' | Attribute:'OrganizationAddress' %}
4 {% assign organizationWebsite = 'Global' | Attribute:'OrganizationWebsite' %}
5 {% assign organizationEmail = 'Global' | Attribute:'OrganizationEmail' %}
6 {% assign organizationPhone = 'Global' | Attribute:'OrganizationPhone' %}
7 {% assign currencySymbol = 'Global' | Attribute:'CurrencySymbol' %}
8 <DOCTYPE html>
9 <html>
10 <head>
11 <title>
12   {{ organizationName }} | Donation Receipt
13 </title>
```

Logo

ck So

Upload

Signature Image

Signature Image

Upload

Receipt Issued Location

1011 Clover Bar Rd
Strathcona County, AB T8A
4V7
Canada

Charitable Registration Identifier

123-443-7777-101

PDF Object Settings (Advanced)

margin.top	10	X
margin.bottom	10	X

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

Reporting

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.

The screenshot displays the 'Edit Data View' configuration screen. On the left sidebar, under 'Taxes', the '2018 Not Downloaded' data view is selected. The main configuration area includes:

- Name:** 2018 Not Downloaded
- Description:** (Empty text area)
- Post-filter Transformation:** (Empty dropdown)
- Category:** Taxes
- Persisted Schedule Interval:** (Empty text field)
- Applies To:** Cra Tax Receipt
- Show if:** All of these are True
- Filter 1:** Cra Tax Receipt Fields, Downloaded Date, Is Blank
- Filter 2:** Period Start Date Time Equal To '1/1/2018 12:00 AM'

Buttons at the bottom include 'Save', 'Cancel', and 'Preview'. A 'Create Report' button is also visible in the top right of the configuration area.

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:

Home > Data Views

Data Views

Home > Data Views

+ Add Category | + Data View

- Communication Segments
- Foundational Views
- Group Requirements
- Taxes
 - 2018 Not Downloaded

Add Data View Id: 0

Name *

Givers Who Have Not Downloaded Receipts

Description

Post-filter Transformation

Category *

Taxes

Persisted Schedule Interval ⓘ

Applies To

Person

Show if **Any** **All** of these are **False** **True** Add Filter Group | Add Filter

Filter Type: CRA Tax Receipts Data View

Has a Person in this Data View ⓘ

2018 Not Downlo...

Save **Cancel** Preview

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