

# Statement and Receipt FAQs

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## What Is the difference between a statement and a receipt?

**Statement:** A statement is generated for any user with activity. User activity includes ticket orders, instant, vote or raffle item purchases, auction winnings, and donations. Statements are automatically emailed to any user who secures their outstanding balance with a valid email on file. See a sample of this statement attached.

[Statement.png](#) 

**Receipt:** A receipt is generated for all paid users (in full or partial payment). Receipts can only be downloaded by an org or campaign admin from communications settings. See a sample of this receipt attached.

[Receipt.png](#) 

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## What is automatically sent to our users?

Once a user completes checkout, they are automatically emailed a copy of their statement to the email address on file. They are not emailed a copy of the generated tax letter and receipt, or the item donation letter found in [Communication Settings](#).

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## Can I email my user's receipts?

At this time, there is not a way to email receipts directly to users through the platform. You can export the [Registered Users Report](#) from the Reports page to obtain all email addresses from your campaign site. Once you have all these emails you can utilize a third-party email engine (Mail Chimp, Constant Contact, etc.) to email the receipts to the users.

Users are automatically emailed a copy of their statement once their outstanding balance is paid to the address on file. Statements can also be emailed from the Checkout page.

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## How do I update my organization's name or address?

Your organization name and address set in GiveSmart appear at the bottom of statements and receipts.

To update or change the way your organization name appears or the address, reach out Support.

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## How do I update my tax ID?

The Tax ID will appear at the bottom of statements & receipts. To check the Tax ID associated with your campaign, visit the Global settings.

To update or change the Tax ID associated with a merchant account a Legal Name/Tax ID Change form will need to be submitted through the HELP button.

- Download the [Legal Name Change Request Form](#).

## Where will the Statement Note appear?

A [statement note](#) will appear on all statements and in some email communications. See the full list below.

| Location                      | Notification Prompt   | Statement/Receipt | Statement Note |
|-------------------------------|---|-------------------|----------------|
| <b>Donate from Donate Now</b> |   |                   |                |
| <b>Donor</b>                  | Complete donation from Donate Now (Homepage)                          | Receipt           | No             |
|                               | Click 'Print this receipt' from Donate Now complete page              | Receipt           | No             |
|                               | Donation confirmation email   |                   | No             |
|                               | Click 'View Receipt Online' from confirmation email                   | Receipt           | No             |
|                               | Click 'Print this receipt' after email link click                     | Receipt           | No             |
| <b>Admin</b>                  | Donation confirmation email   |                   | No             |
|                               |   |                   | No             |
| <b>Homepage Order Form</b>    |   |                   |                |
| <b>Purchaser</b>              | Complete homepage order form purchase                                 | Statement         | Yes            |
|                               | click Print this receipt from ticket purchase complete page           | Statement         | Yes            |
|                               | Ticket confirmation email (purchaser)                                 | Statement         | Yes            |
|                               | Click 'View Receipt Online' from confirmation email                   | Statement         | Yes            |
|                               | Click 'Print this receipt' after email link click                     | Statement         | Yes            |
| <b>Admin</b>                  | Homepage order form confirmation email click 'View Receipt Online'    | Statement         | Yes            |
|                               | Click 'Print this receipt' after email link click                     | Statement         | Yes            |
| <b>Custom Order Form</b>      |   |                   |                |
|                               | *Everything is the same as from the Homepage Order Form               |                   |                |
| <b>User Details</b>           |   |                   |                |
|                               | Users > Details > Actions > Generate Statement                        | Statement         | Yes            |
| <b>User Checkout</b>          |   |                   |                |
|                               | Complete Checkout (Auto-Email)  |                   | No             |
|                               | Complete Checkout (Auto-Email) Click 'View Statement'                 | Statement         | Yes            |
|                               | Users > Checkout > View Cart > Generate Receipt                       | Receipt           | No             |
|                               | Users > Checkout > View Cart > Email Statement (Email Received)       |                   | No             |
|                               | Users > Checkout > View Cart > Email Statement (Click View Statement) | Statement         | Yes            |
| <b>Pay Tab</b>                |   |                   |                |
|                               | Pay Tab > View Order (for ticket orders)                              | Statement         | Yes            |
|                               | Pay Tab > View Order (for ticket orders) click 'Print this receipt'   | Statement         | Yes            |
|                               | Click 'View My Statement for Printing'                                | Statement         | Yes            |
|                               | Click 'Send Statement Link to My Email' (Email Received)              |                   | No             |
|                               | Click 'Send Statement Link to My Email' (Click View Statement)        | Statement         | Yes            |
| <b>Communication Settings</b> |   |                   |                |
|                               | Generate Statements   | Statement         | Yes            |
|                               | Generate Receipts   | Receipt           | No             |