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

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**.

Can I email my user's receipts?

Currently, there is no 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.

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 to GiveSmart Support.

Can I add merge fields or bitly links to a statement note?

No, the statement note field does not support merge fields or bitly links (ex: ##Event_Name##).

Merge fields and bitly links can only be added to the Receipts and Notifications field and the Item Donation Letter fields.

How do I update my tax ID?

The organization's 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. **Please note** only the current signer on file can submit a legal name/TIn change form.

- 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
Donate from Donate Now			
Donor	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
Admin	Donation confirmation email		No
Homepage Order Form			
Purchaser	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
Admin	Homepage order form confirmation email click 'View Receipt Online'	Statement	Yes
	Click 'Print this receipt' after email link click	Statement	Yes
Custom Order Form			
	*Everything is the same as from the Homepage Order Form		
User Details			
	Users > Details > Actions > Generate Statement	Statement	Yes
User Checkout			
	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
Pay Tab			
	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
Communication Settings			
	Generate Statements	Statement	Yes
	Generate Receipts	Receipt	No