

# Sending Thank You Emails & Letters

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## Donor Management System

Thanking your donors for each donation to your cause, however large or small the gift, is important for the long-term growth of your organization. To build trust and loyalty, and facilitate continued donations and support, the most successful charities acknowledge their donors and generously communicate their gratitude and appreciation for them. This could be in the form of [newsletters](#), [announcements and other forms of communications](#) to share why and how each donor's gift makes a difference. Charities aiming to provide a more personal touch send out *individualized* thank you emails and letters.

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▢ Prefer to watch a **guided walk-through** of thanking your donors through the DMS? Check out our [Communicating with your Donors Webinar!](#)

With CanadaHelps' Donor Management System, charities can create templates, send thank you emails individually or in bulk via email or by printing letters, and verify that a thank you message has been sent to the donor. Please see the chart below to determine which process best suits your needs.

### I want to...

Create a new Custom thank you message template.	Send thank you messages with tax receipts.	Send thank you messages separately in bulk.	Send thank you messages separately.	Confirm that a thank you has already been sent.
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<p><b>When should I use this?</b></p>	<p>If you don't have an existing template, we recommend you create one to test and preview before you send a thank you message to one or more donors.</p>	<p>When you want to combine a tax receipt and a thank you message in a convenient email.</p>	<p>When you want to send thank you emails in bulk.</p>	<p>For contributions that are not eligible for tax receipting, when you want to send a thank you after providing a physical tax receipt, or generating a PDF thank you letter for printing and mailing.</p>	<p>To ensure you've sent a thank you message or to help prevent you from sending duplicate thank you messages.</p>
<p><b>How do I do this?</b></p>	<p>Follow the steps in the <a href="#">Adding &amp; Managing an Email &amp; Letter Template</a> article for the full instructions.</p>	<p>Follow the steps in the <a href="#">Issuing Tax Receipts</a> article for the full instruction.</p>	<p>Follow the steps in the <a href="#">Thank Donors in Bulk Based on Dedication</a> article for the full instructions.</p>	<p>Follow the steps in the <a href="#">Thanking Your Donor</a> section below and in the <a href="#">Non-Charitable Receipting</a> resource.</p>	<p>Follow the steps in the <a href="#">Confirming That a Thank You Has Been Sent</a> section below.</p>

## Thanking your Donors

Sending thank you messages is a great way for charities to connect with their donors at an intimate level. Whether it's a touching story about how a donor's gift directly shapes the lives of others or how their gift helped invigorate ecosystems, thank you emails and letters make your donors feel great about giving to your charity and inspire them to give again.

To send a separate thank you message, follow the steps below:

1. Go to the **Contributions Tab**

2. Search for a specific Contribution or select either:

- (1) **The specific Contributions** associated with the Contacts you wish to thank,
- (2) Every listed Contribution **on the page**, or
- (3) All **Contributions** in your search criteria

Wellness Avenue | Dashboard | Contacts | **Contributions** | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

Search by contributor name or email [ ] [ ] Advanced Search

Actions ▾  3 Selected Records Only  All 1430 Records <sup>3</sup>

All Contributions ▾ Advanced Actions ▾ Add Contribution

<input type="checkbox"/>	Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
<input type="checkbox"/>	March 1st, 2023 09:41 AM	Noboru K	\$50.00 (Recurring)	2023	Monthly Giving Webinar	DMS Manual	Cheque	Completed		✓
<input checked="" type="checkbox"/>	March 1st, 2023 09:19 AM	Alex Fergie	\$100.00	General Fund		DMS Manual	Cheque	Completed	WELL00000913	✓
<input type="checkbox"/>	March 1st, 2023 01:52 AM	Noboru K	\$1.00	2023	Monthly Giving Webinar	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed		-
<input type="checkbox"/>	March 1st, 2023 01:51 AM	Benjamin Franklin	\$1.23	Fitness	Bottle Drive	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed		-
<input checked="" type="checkbox"/>	February 28th, 2023 06:30 PM	Nicole Lam	\$250.00	General Fund		DMS Manual	Cheque	Completed	WELL00000912	✓
<input checked="" type="checkbox"/>	February 28th, 2023 03:40 PM	Lucas Froese	\$50.00	General Fund		DMS Manual	Cheque	Completed	WELL00000911	✓
<input type="checkbox"/>	February 28th, 2023	Nicole Lam	\$150.00	General Fund		DMS Manual	Cheque	Completed		-

Search for your desired Contacts

3. Select the **Actions** menu at the upper-left side of the Contributions list

4. Scroll down the **Actions** menu and select **Send Thank You**

Wellness Avenue | Dashboard | Contacts | **Contributions** | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

Search by contributor name or email [ ] [ ] Advanced Search

Actions ▾  50 Selected Records Only  All 1458 Records

All Contributions ▾ Advanced Actions ▾ Add Contribution

- Export Contributions
- Issue Aggregated Tax Receipts
- Issue Separate Tax Receipts
- Send Thank You**

<input type="checkbox"/>	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked	
<input type="checkbox"/>	Benjamin Franklin	\$1.23	Fitness	Bottle Drive	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed		-	
<input type="checkbox"/>	Nicole Lam	\$150.00	General Fund		DMS Manual	Cheque	Completed		-	
<input checked="" type="checkbox"/>	March 2nd, 2023 02:17 PM	Lucas Froese	\$200.00	General Fund		DMS Manual	Cheque	Completed	WELL00000924	✓
<input checked="" type="checkbox"/>	March 2nd, 2023 01:34 PM	Nina Canadahelps	\$100.00	Community Outreach Fund		DMS Manual	Cash	Completed		-
<input checked="" type="checkbox"/>	March 2nd, 2023 11:38 AM	Nicole Lam	\$100.00	General Fund		DMS Manual	Cheque	Completed		✓
<input checked="" type="checkbox"/>	March 2nd, 2023 10:30 AM	A. L. Kostenko	\$78.00	Community Outreach Fund		DMS Manual	Cash	Completed		-
<input checked="" type="checkbox"/>	March 2nd, 2023	A. L. Kostenko	\$88.00	General Fund		DMS Manual	EFT	Completed		-

Select Actions > Say Thanks - Print or Email

5. On the next page, you will see the following information:

Thank You Letter(s) for Contribution(s)

Number of selected contributions: 50

^ Thank-you Letter Options

Update thank-you dates for these contributions

Print and email options   Generate PDFs for printing (only)

From Email Address \*   "Wellness Ave." <wellnessave@canadahelps.ca>

Use Template   - select -

Email/Activity Subject

^ Page Format: Default PDF Format

^ Preview Document



^ Document Body

<> Merge Fields

Rich text editor toolbar with options for Source, Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Link, Unlink, Table, Table of Contents, and other formatting tools.

Save As New Template

Document Type   Portable Document Format (.pdf)

Make Thank-you Letters   Cancel

Thanking Your Donor Page

**Thank-you Letter Options:**

- **Update thank-you dates for these contributions:** updates when the Contact was thanked for the associated Contribution as the date of when you make this Thank-you Letter.
- **Print and email options:** select the way you want to thank your Contacts.

**Email Options:**

- **From Email Address:** which email address is used to send this Thank-you Letter. You can also [add additional From Email names](#).
- **Use Template:** select an [already created Template](#) or create a new one by selecting **Save As New Template** at the bottom of the page.

- **Email/Activity Subject:** the subject of the email and the [Activity](#) associated with the Contacts after making the Thank-you Letter. Please note that [Merge Fields](#) are not available within the Email Message subject at this time, when Thanking Your Donor.

**Page Format: Default PDF format:**

- Format the PDF dimensions for printing and/or download.

**Document Body:**

- Compose your email using this standard formatting tool that uses rich-text (e.g. bold, italics, etc.).
- **Merge Fields:** formerly known as DMS Tokens, they can be used to automatically include information from a Contact in emails (e.g. "Dear {Contact First Name})

**Saving Options:**

- **Save As New Template:** save the created or updated contents of this Thank-You Letter as a new Template.
- **Document Type:** At this moment, you can only download or preview your letter as a **Portable Document Format (.pdf)**

6. Fill out all mandatory fields and compose your Thank-you Letter.

7. You can use an existing [Template](#) or save the contents of your newly composed email/letter by selecting **Save As New Template**

8. Select **Update thank-you dates for these contributions** at the top left of the page if you want to update the date the associated Contacts were Thanked.

9. After all the necessary information is added, select **Make Thank-you Letters** at the bottom of the page to print your letters and/or send emails to the associated Contacts.

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## Confirming a Thank You Has Been Sent

Avoid confusing your donors by accidentally sending duplicate thank you messages. With the DMS, there are two ways you can verify that a thank you message has been sent to the donor.

To confirm that you've already **sent** a Thank You or **marked** a Contribution as Thanked, you can check the:

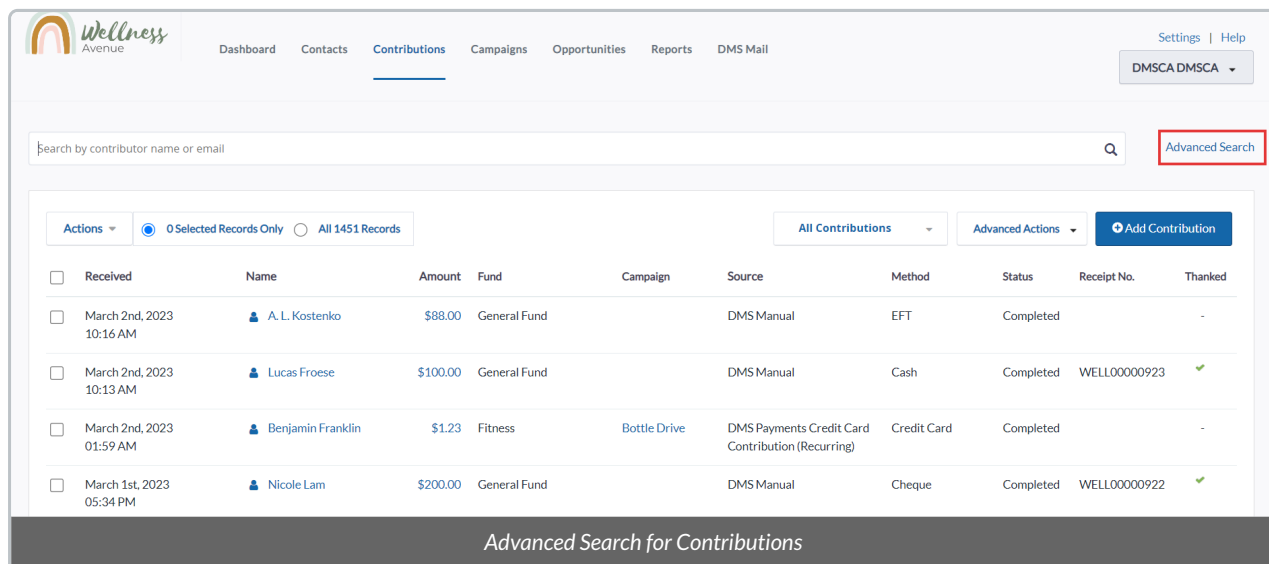
- [Thanked column in the Contributions tab](#)

If you wish to apply a check mark in the "Thanked" column of the Contribution tab, without actually generating a dedicated Thank You Email or Letter, you can override this in the [Receipting portal](#) by selecting **Mark Contribution as thanked**.

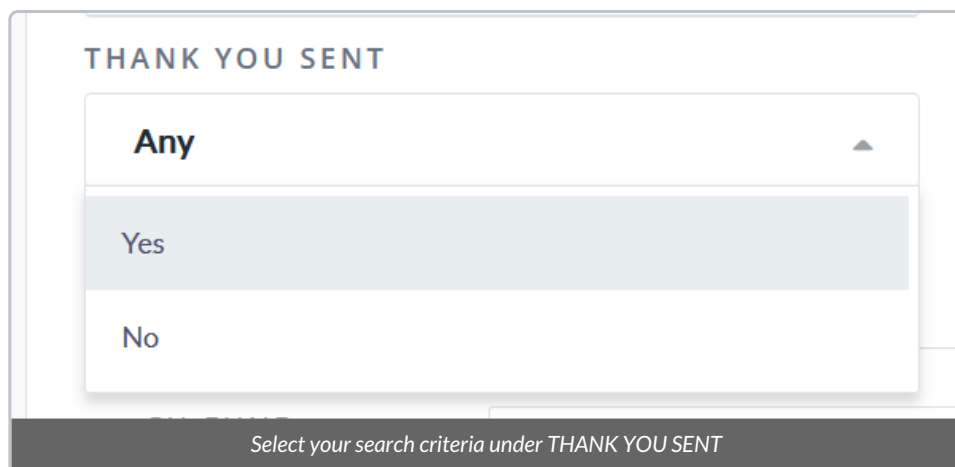
Learn more about Thanking your donors at the same time as issuing Receipts here.

## Confirming a Thank You Has Been Sent Via the Contribution Tab

1. Go to the **Contributions Tab**.
2. Select **Advanced Search** on the top right side of the page.



3. Under **Edit Search Criteria**, locate the subheading **THANK YOU SENT**.



**Note:** By default, Any will automatically be selected. This means all contributions, whether a thank you message has been sent or not, will be displayed on the Contributions Tab.

- From the THANK YOU SENT dropdown, select from one of the following:
  - Click **Yes** to only display contributions where a thank you message has been sent;
  - Click **No** to only display contributions where a thank you message has not been sent; or
  - If you'd like to change your Yes or No selection and **revert to the Any selection**, click the **x** beside Yes or

No.

- Scroll down and click **Search**.
- In the search results, located the Thanked column on the right side of the table.
- Under the thanked column will be a ✓ or a blank space.
- A ✓ indicates that a Thank You message has been sent.
- An empty space indicates that a thank you message has not been sent.

In addition to the THANK YOU SENT filter, you'll have the opportunity to customize your search results even further with the additional search filters on this page. To learn how to customize your search, follow the steps to [Advanced Search for Contributions](#).