

Answering Email Replies

Last Modified on 03/03/2023 9:35 am EST

Donor Management System

Whenever you send an email through the DMS, you will be able to see and answer replies to these emails directly in the system.

The following guide will only apply if your organization's DMS is configured to receive email replies within the system.

Table of Contents:

- [Considerations](#)
- [Which Emails can receive Replies in the DMS?](#)
- [What happens when I receive a New Email Reply?](#)
- [Identifying & Answering Email Replies](#)
 - [From the Dashboard](#)
 - [From the Reports Tab](#)
 - [From the Contact Profile](#)

Considerations

- If your DMS Email receives a reply from an email address that is not associated with one of your Contacts, the DMS will automatically add a new Contact for that new email address.
- Email Replies received from your Contacts and any answers to them through the DMS will not be combined onto a single email thread. Each email will be categorized as one separate Activity.
- New Email Replies will refresh within your Home Page hourly.
- [Please be sure to have requested a DMS From Email](#) and that you have received confirmation of set-up from your Onboarding Expert.

Which Emails can receive Replies in the DMS?

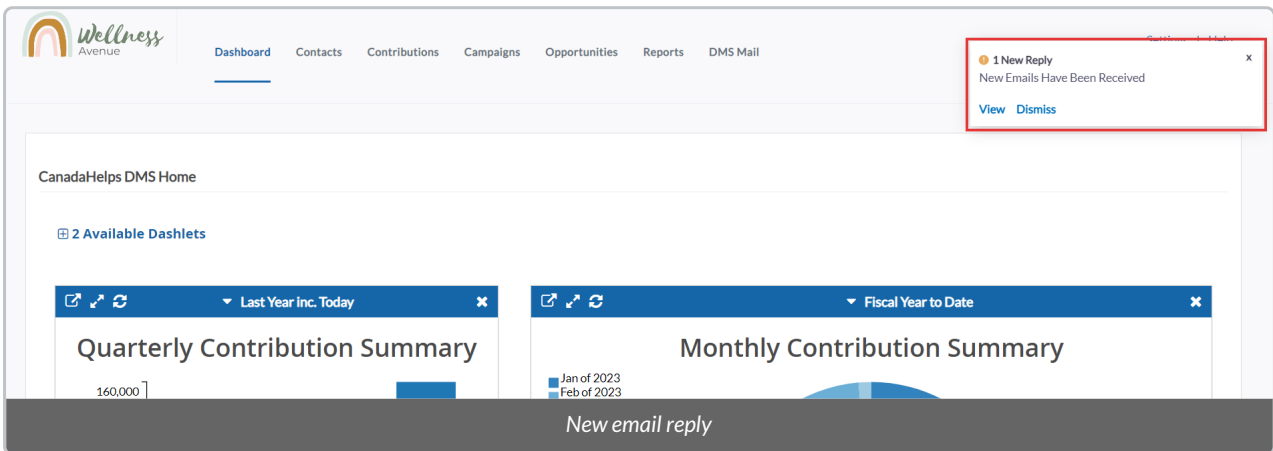
Replies to the following emails sent through the DMS will be visible in the system:

- [Single Emails](#)
- [Bulk Emails \(DMS Mail\)](#)
- [Thanking your Donor](#)
- [Receipting](#)

What happens when I receive a New Email Reply?

Upon signing into your DMS, you will receive a pop-up notification indicating new inbound emails.

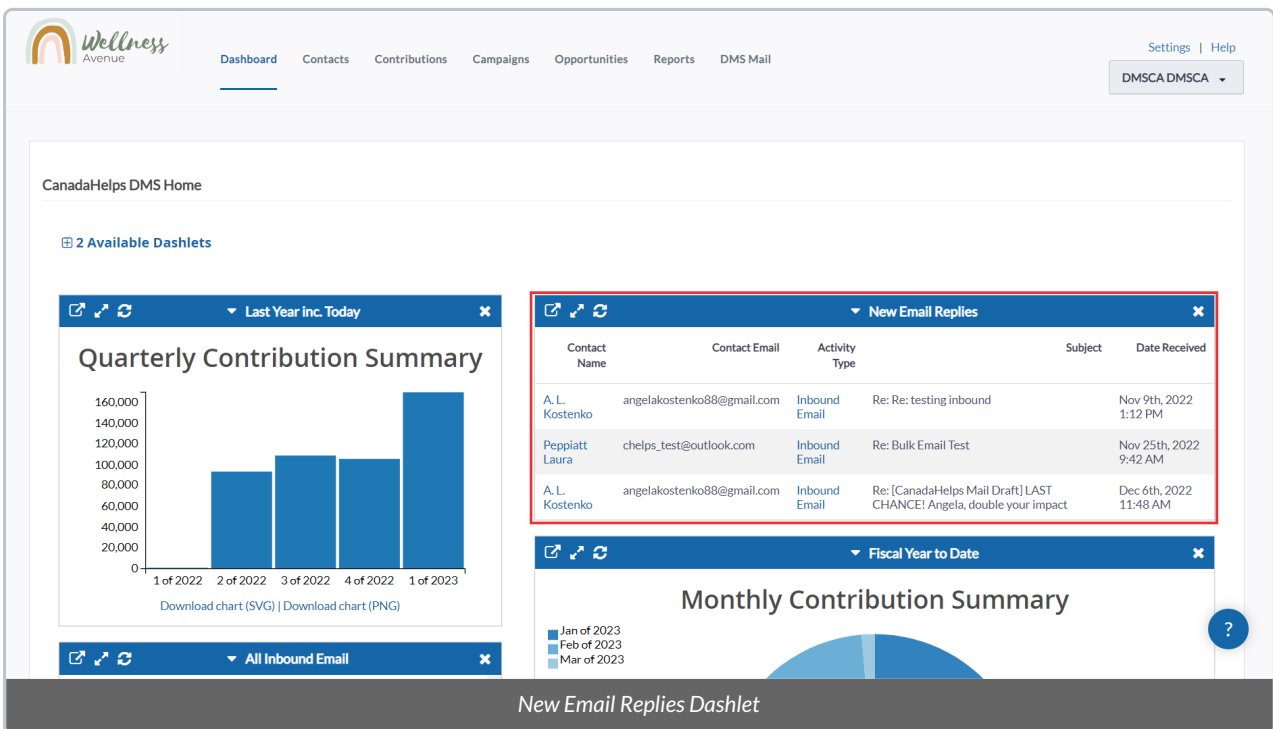
Select **View** to access the new emails, or select **Dismiss** to dismiss the notification.



Identifying & Answering Email Replies

From the Dashboard

1. Visit your *main Dashboard*
2. You will then see the **New Email Replies** Dashlet on your *Home Dashboard* with all of your unread email replies



3. To view an Email Reply, select **Inbound Email** to the right of your desired Email

Wellness Avenue

Dashboard | Contacts | Contributions | Campaigns | Opportunities | Reports | DMS Mail

Settings | Help

DMSCA DMSCA

CanadaHelps DMS Home

2 Available Dashlets

Last Year Inc. Today

Quarterly Contribution Summary

Quarter	Contribution
1 of 2022	~90,000
2 of 2022	~110,000
3 of 2022	~100,000
4 of 2022	~150,000

Download chart (SVG) | Download chart (PNG)

All Inbound Email

New Email Replies

Contact Name	Contact Email	Activity Type	Subject	Date Received
A. L. Kostenko	angelakostenko88@gmail.com	Inbound Email	Re: Re: testing inbound	Nov 9th, 2022 1:12 PM
Peppiatt Laura	chelps_test@outlook.com	Inbound Email	Re: Bulk Email Test	Nov 25th, 2022 9:42 AM
A. L. Kostenko	angelakostenko88@gmail.com	Inbound Email	Re: [CanadaHelps Mail Draft] LAST CHANCE! Angela, double your impact	Dec 6th, 2022 11:48 AM

Fiscal Year to Date

Monthly Contribution Summary

Jan of 2023
Feb of 2023
Mar of 2023

Select **Inbound Email** for your desired email reply

4. Next, you can read the contents of that email. When ready, select **Reply** at the bottom right.

alex, anjana

Added by: Admin, CanadaHelps

With Contact: alex, anjana

Assigned to:

Subject: What a year!

Campaign Group:

Engagement Index:

Location:

Date: Apr 15th, 2021 2:16 PM

Duration:

Activity Status: New Reply

Details

Hi everyone,

I know that this year has been...

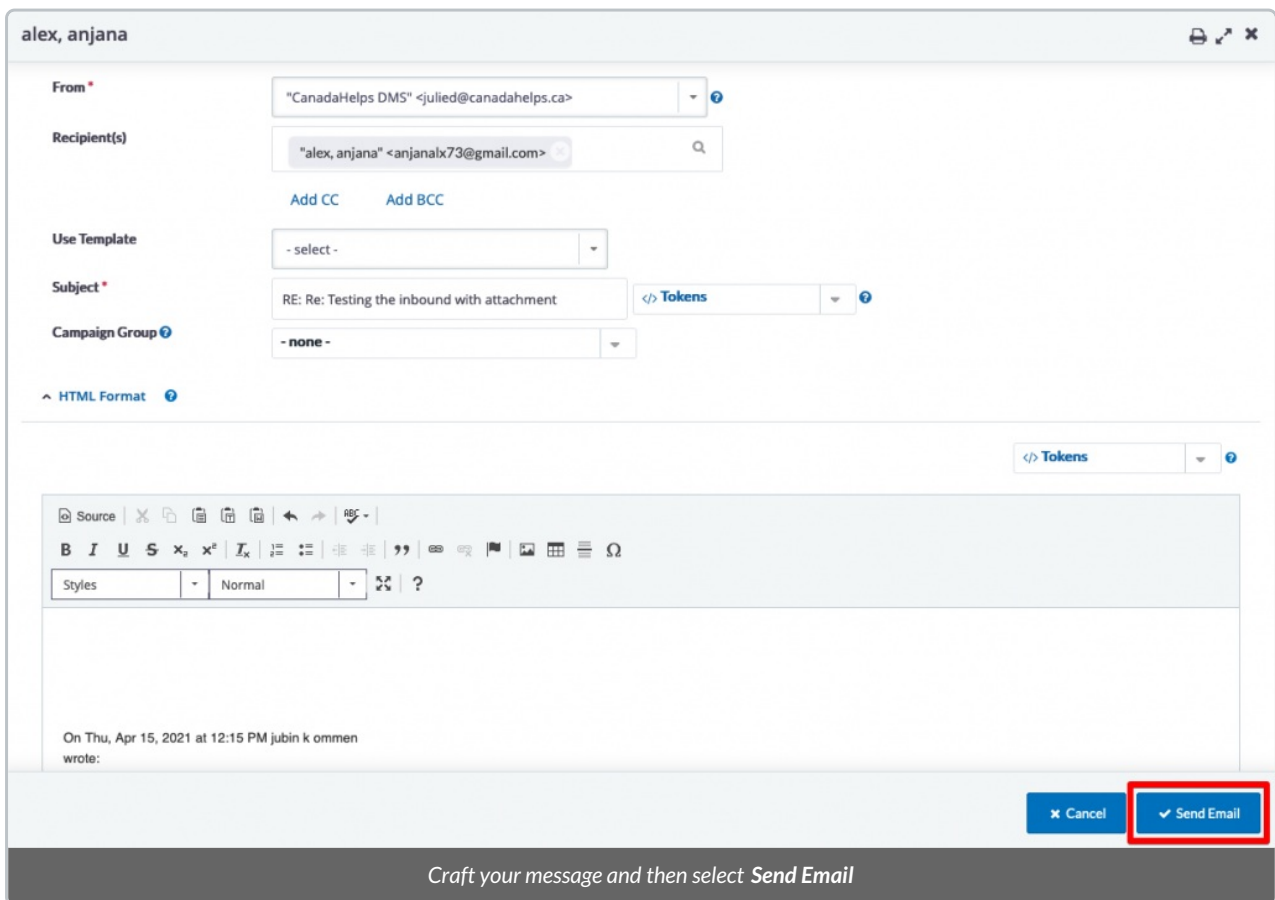
Done | Archive | Reply

Select Reply

Note: You can also **Archive** that email to dismiss it from this page. You will then need to select **Refresh Dashboard Data** on the top right corner of the Home Tab page to dismiss the email.

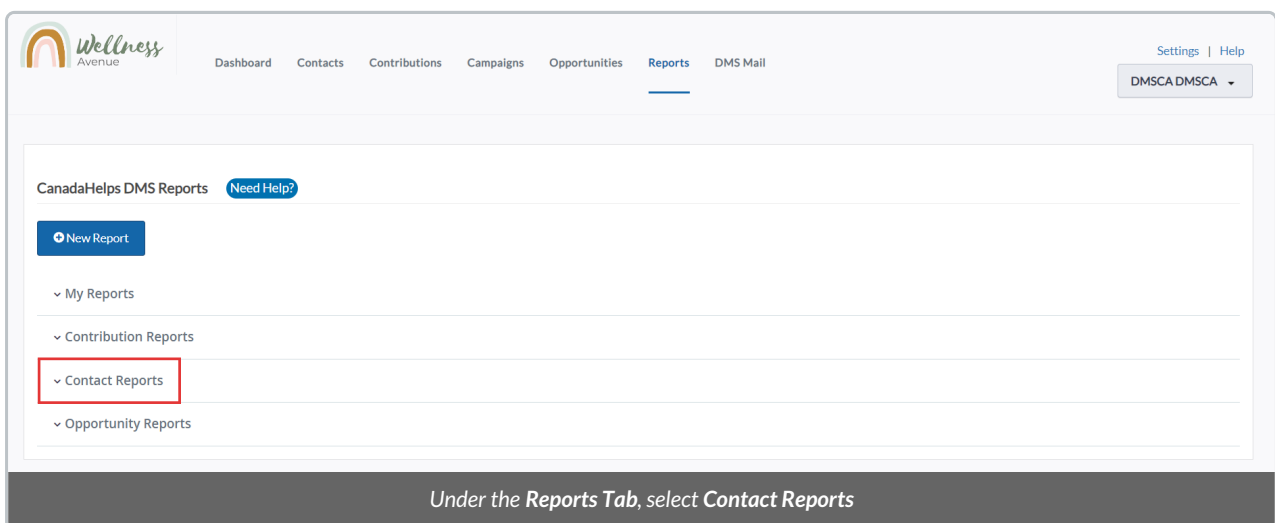
5. On the next page, craft your email. You can use **Templates** and **Merge Fields**.

6. Then, select **Send Email** on the bottom right. Your Contact will receive the email and it will create an **Activity** related to it on their **Contact Profile**.

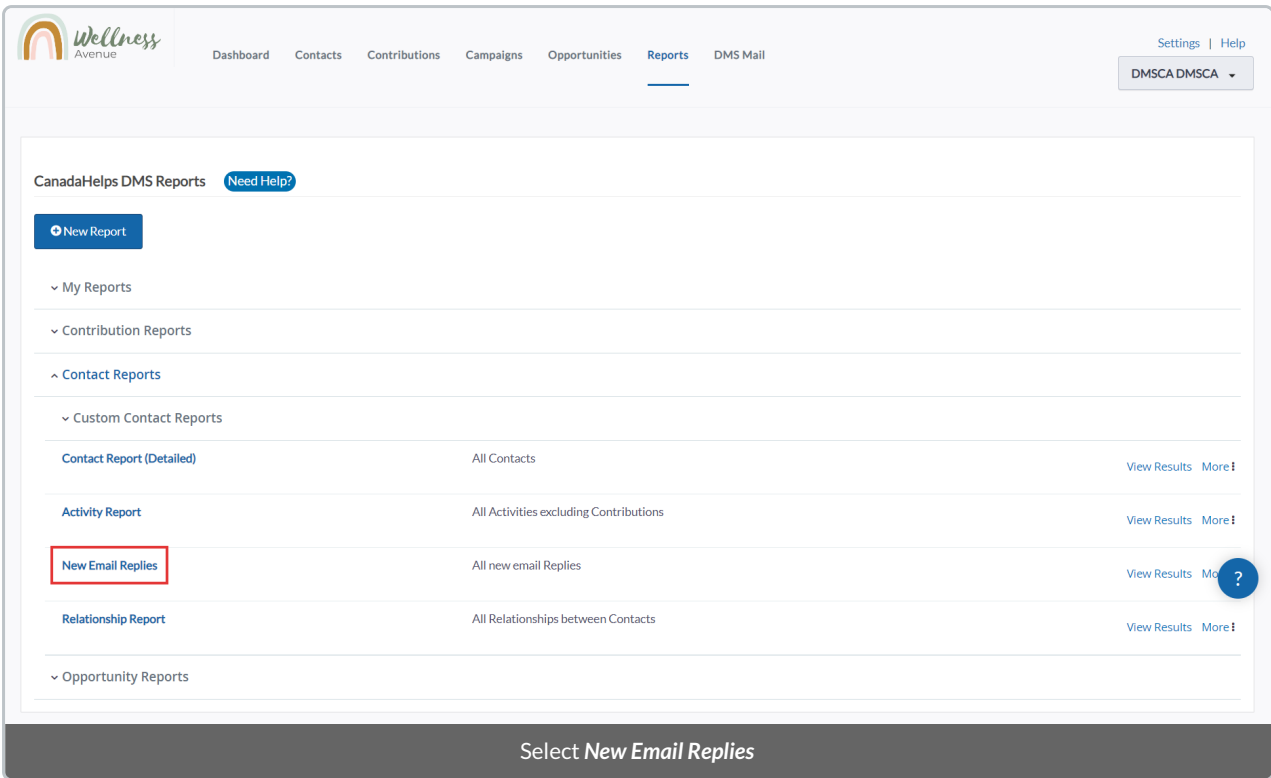


From the Reports Tab

1. Visit your **Reports Tab**
2. Select **Contact Reports**

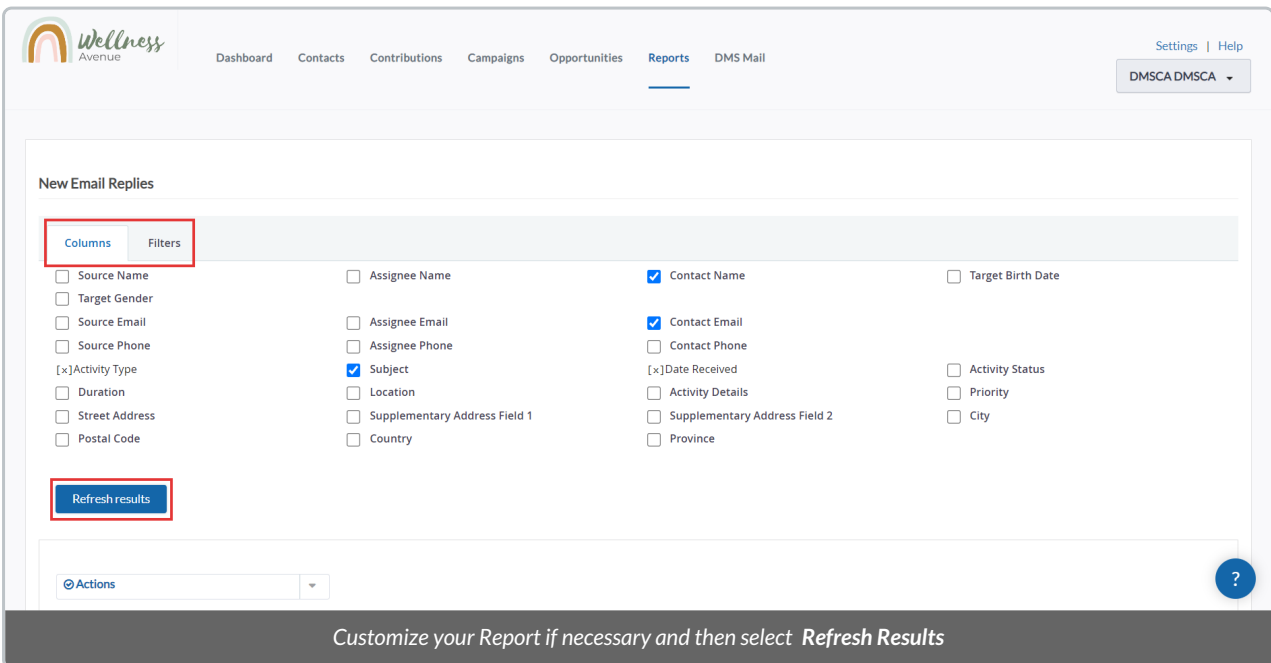


3. Select the **New Email Replies** Report



4. On the next page, you can customize your Report with Columns and Filters

5. Once you're satisfied, select **Refresh Results**



6. To view an Email Reply, select **Inbound Email** to the right of your desired Email

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Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

New Email Replies

Columns Filters

Refresh results

Actions

Limit To Current User Is equal to No

Activity Type Is Inbound Email

Activity Status Is New Reply

Contact Name	Contact Email	Activity Type	Subject	Date Received
A. L. Kostenko	angelakostenko88@gmail.com	Inbound Email	Re: Re: testing inbound	Nov 9th, 2022 1:12 PM
Peppiatt Laura	chelps_test@outlook.com	Inbound Email	Re: Bulk Email Test	Nov 25th, 2022 9:42 AM
A. L. Kostenko	angelakostenko88@gmail.com	Inbound Email	Re: [CanadaHelps Mail Draft] LAST CHANCE! Angela, double your impact	Dec 6th, 2022 11:48 AM

Row(s) Listed 3

Select **Inbound Email** for your desired email reply

7. Next, you can read the contents of that email. When ready, select **Reply** at the bottom right.

alex, anjana

Added by Admin, CanadaHelps

With Contact alex, anjana

Assigned to

Subject What a year!

Campaign Group

Engagement Index

Location

Date Apr 15th, 2021 2:16 PM

Duration

Activity Status New Reply

Details

Hi everyone,

I know that this year has been...

Done Archive Reply

Select Reply

Note: You can also Archive that email to dismiss it from this page. You will then need to refresh your page to dismiss the email.

8. On the next page, craft your email. You can use [Templates](#) and [Merge Fields](#).

9. Then, select **Send Email** on the bottom right. Your Contact will receive the email and it will create an [Activity](#) related to it on their [Contact Profile](#).

The screenshot shows an email composition window titled "alex, anjana". The "From" field is set to "CanadaHelps DMS" <julied@canadahelps.ca>. The "Recipient(s)" field contains "alex, anjana" <anjanalx73@gmail.com>. There are "Add CC" and "Add BCC" buttons below the recipient field. The "Use Template" dropdown is set to "- select -". The "Subject" field contains "RE: Re: Testing the inbound with attachment" and a "Tokens" dropdown menu. The "Campaign Group" dropdown is set to "- none -". Below the fields is an "HTML Format" section with a "Tokens" dropdown. The main body of the email is a rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, image, table, and a help icon. The text in the editor reads "On Thu, Apr 15, 2021 at 12:15 PM jubin k ommen wrote:". At the bottom right, there are two buttons: "Cancel" and "Send Email", with the "Send Email" button highlighted by a red rectangle. A footer bar at the bottom of the window contains the text "Craft your message and select Send Email".

From the Contact Profile

1. Go to the **Contacts Tab**
2. Search for the Contact you wish to see their Email Replies and select their **Name** to open their [Contact profile](#)
3. On the next page, select **Activities**

A. L. Kostenko

Actions [Edit](#)

Summary Contributions 34 **Activities 88** Relationships 4 Groups 9 Notes 3 Tags 7 Opportunities

Home Address 79 Earls court Ave.
Toronto, ON M6E4A7
Canada

Billing Address A. L. Kostenko
79 Earls court Ave.
Toronto, ON M6E4A7
Canada

Home Email angelakostenko88@gmail.com

Billing Email angelakostenko88@gmail.com

Phone

Summary Fields

Total Lifetime Contributions 4,465.92

Amount of last contribution 78.00

Date of Last Contribution 03/02/2023 10:30AM

Date of First Contribution 07/06/2022 12:54PM

Largest Contribution 1,000.00

Count of Contributions 30

Tags Event Attendees Staff Members 50/50
Child Sponsorship Event Sponsor test
New Additions

Contact Type Individual

Contact ID 481

External ID

Gender She/Her

Date of Birth March 23rd, 1981

Age 41 years

Employer CanadaHelps

Job Title

Recognition Name

Source DMS Manual

Instagram Website <http://www.instagram.com>

Work Website <http://www.canadahelps.org>

Delete Contact

Under their Contact Profile, select Activities

4. You will then see the Email Replies in red (signalling that they are still unread) and with the Type as *Inbound Email*. You will also be able to filter by this specific Type.

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Dashboard **Contacts** Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

A. L. Kostenko

Actions Edit

Summary Contributions 34 Activities 88 Relationships 4 Groups 9 Notes 3 Tags 7 Opportunities

+ New Activity

Filter by Activity

Include: Inbound Email Exclude: - no types exclude- Date: Any Status: Any

Show 25 entries

Type	Subject	Added By	With	Assigned	Date	Status	
Inbound Email	Re: Thank you for giving to Wellness Ave., A. L.!	DMSCA DMSCA	A. L. Kostenko	n/a	Feb 13th, 2023 8:57 PM	Completed	View
Inbound Email	Re: [CanadaHelps Mail Draft] LAST CHANCE! Angela, double your impact	Wellness Ave.	A. L. Kostenko	n/a	Dec 6th, 2022 11:48 AM	New Reply	View
Inbound Email	Re: Re: testing inbound	DMSCA DMSCA	A. L. Kostenko	n/a	Nov 9th, 2022 1:12 PM	Completed	View
Inbound Email	Re: testing inbound	DMSCA DMSCA	A. L. Kostenko	n/a	Oct 24th, 2022 11:00 AM	Completed	View

Showing 1 to 4 of 4 entries

Delete Contact

All unread email replies will be displayed in red

5. To view an Email Reply, select **View** to the right of your desired Email

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Dashboard **Contacts** Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

A. L. Kostenko

Actions Edit

Summary Contributions 34 Activities 88 Relationships 4 Groups 9 Notes 3 Tags 7 Opportunities

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Type	Subject	Added By	With	Assigned	Date	Status	
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Inbound Email	Re: Re: testing inbound	DMSCA DMSCA	A. L. Kostenko	n/a	Nov 9th, 2022 1:12 PM	Completed	View
Inbound Email	Re: testing inbound	DMSCA DMSCA	A. L. Kostenko	n/a	Oct 24th, 2022 11:00 AM	Completed	View

Select View for your desired email reply

6. Next, you can read the contents of that email. When ready, select **Reply** at the bottom right.

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Added by Admin, CanadaHelps

With Contact alex, anjana

Assigned to

Subject What a year!

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Location

Date Apr 15th, 2021 2:16 PM

Duration

Activity Status New Reply

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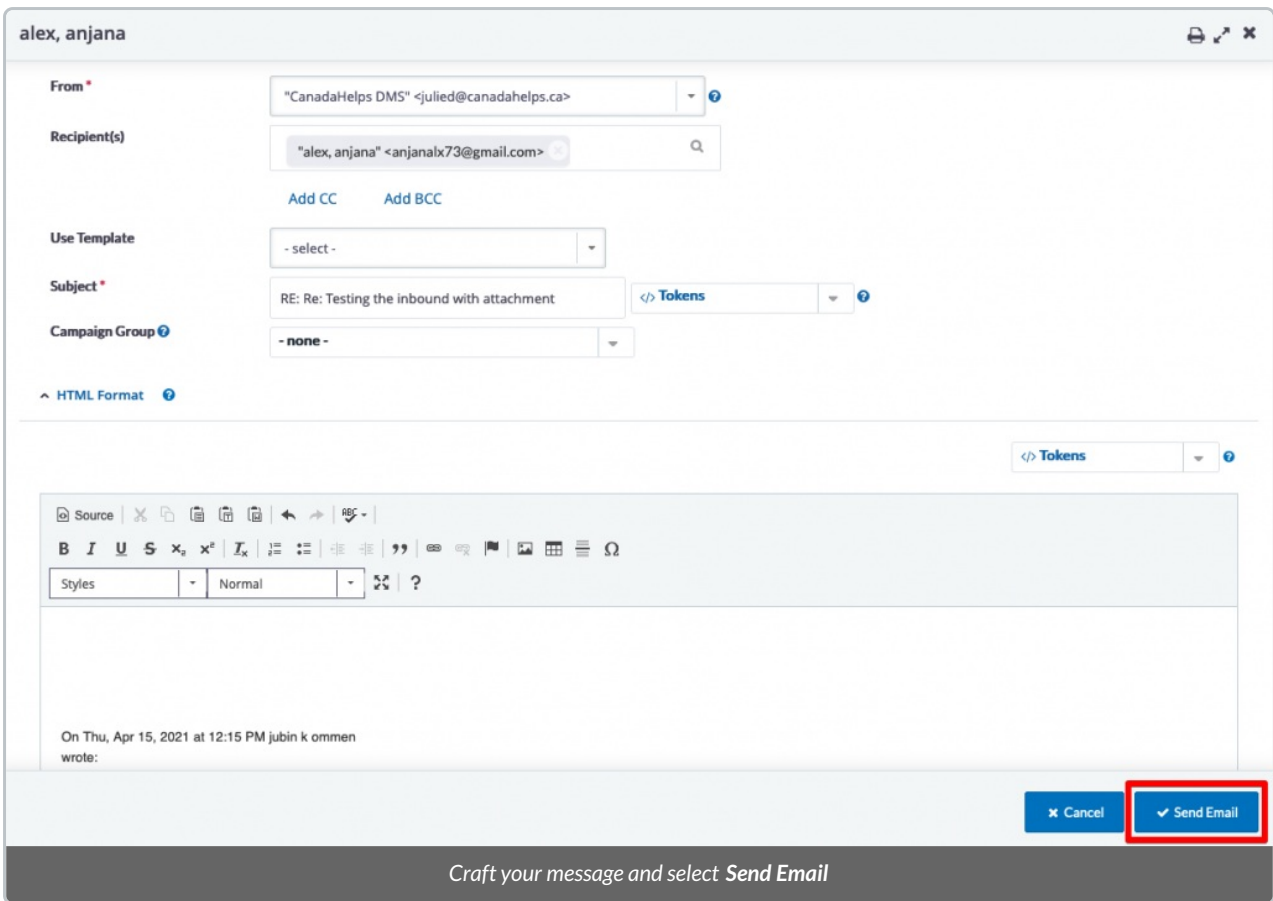
Done Archive Reply

Select Reply

Note: You can also Archive that Activity to marked it as Completed (and change its colours from red to black).

8. On the next page, craft your email. You can use [Templates](#) and [Merge Fields](#).

9. Then, select **Send Email** on the bottom right. Your Contact will receive the email and it will create an [Activity](#) related to it on their [Contact Profile](#).



10. After answering an Email Reply, the email you will be marked as **Completed** automatically (and change colours from red to black). You can also manually change that specific Activity from **New Reply** to **Completed** by hovering your mouse cursor on top of its **Status**

