

# Modifying the Default Tax Receipt Emails

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## Donor Management System

When [issuing](#) and [re-issuing](#) DMS-issued tax receipts, if you've chosen **email as the delivery method**, your tax receipts will include a thank-you email message in the body of the email with the donor's tax receipt attached.

This article will cover how to modify the default message on the body of the Tax Receipt Email.

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▮ Prefer to watch a **guided walk-through** on configuring your Tax Receipt Emails? Check out our [Tax Receipting Webinar!](#)

## Considerations

- **You can only set one single "From Email"** when issuing, re-issuing and cancelling Tax Receipts.
- Be sure to set your default emails for both **English** and **French** receipt, so the default emails correspond to the issued tax receipt's language.
- If you wish to customize your receipt emails further, [consider reading our Issuing Tax Receipts guide here](#) to learn how to build multiple Thank You Email Messages and override the Default Tax Receipt Email when issuing receipts.
- **You can only have one single Template** when issuing, re-issuing and cancelling Tax Receipts.

## Default Tax Receipt Emails

The default Tax Receipt emails sent through the DMS look something like this:

Dear Rainan,

Attached please find your official tax receipt for income tax purposes.

CanadaHelps



*Example of a Tax Receipt Email seen by donors*

Although you can continue to use the default email message, we highly suggest modifying this email message for that added personalization which can go a long way when stewarding your donors.

## Modifying the Default Tax Receipt Emails

1. Visit your **administrative Settings**.
2. Under **Communications**, select **Message Templates**

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings Help

DMSCA DMSCA

### Administer CanadaHelps DMS

- Customize Data and Screens
  - Website Forms
  - Contact Types
  - Activity Types
  - Tags (Categories)
- Communications
  - Organization Address and Contact Info
  - Print Page (PDF) Formats
- Message Templates
- Localization
  - Date Formats
- System Settings
  - Payment Processor Settings
  - Import/Export Mappings
  - Misc (Undelete, PDFs, Limits, Logging, etc.)
  - Receipt Settings
- CanadaHelps Contribute
  - Manage Campaigns
  - GL Accounts
  - Funds
  - Manage Groups
- CanadaHelps Campaign Group
  - Campaign Groups
- DMS Mail
  - Headers, Footers, and Automated Messages
  - DMS Templates
  - From Email Addresses
  - Draft, Schedule, and Manage DMS Mails
  - Mailchimp Settings

Settings > Message Templates

3. On the next page, select **System Workflow Messages**

**Message Templates**

User-driven Messages | **System Workflow Messages**

Message templates allow you to easily create similar emails or letters on a recurring basis. Messages used for membership renewal reminders, as well as event and activity related reminders should be created via Schedule Reminders. You can also use message templates for CanadaHelps Mail (bulk email) content. However, subscribe, unsubscribe and opt-out messages are configured at Administer > CanadaHelps Mail > Headers, Footers and Automated Messages.

[Add Message Template](#)

Message Title	Message Subject	Enabled?			
Acknowledgement Email - Yearly	Yearly Acknowledgement Email	Yes	Edit	Disable	Delete
Acknowledgement Receipt - Single transaction	Acknowledgement Receipt	Yes	Edit	Disable	Delete
Attachment Test	Attachment Test	Yes	Edit	Disable	Delete
Basic - Thank You Email	{contact.first_name}, thank you!	Yes	Edit	Disable	Delete

*System Workflow Messages*

4. Then, you will see a list of all Default Messages in the DMS. **The only Default Messages related to Tax Receipts are the four with:**

- **CDN Tax Receipts – Email Annual/Aggregate Receipt:** Email used when **issuing**, **re-issuing** and **cancelling Combined Receipts with Total Contributed**.
- **CDN Tax Receipts – Email Single Receipt:** Email used when **issuing**, **re-issuing** and **cancelling Separate Receipt for Each Contribution**.

5. Select **Edit** on either one of these default messages (Top two for **French** / Bottom two for **English**):

User-driven Messages	System Workflow Messages
System workflow message templates are used to generate the emails sent to constituents and administrators for contribution receipts, event confirmations and many other workflows. You can customize the style and wording of these messages here. <a href="#">?</a>	
<b>Workflow</b> <span>⌵</span>	
(French) CDN Tax Receipts - Email Annual/Aggregate Receipt	<a href="#">Edit</a>
(French) CDN Tax Receipts - Email Single Receipt	<a href="#">Edit</a>
(French) CDN Tax Receipts - Thank you Note	<a href="#">Edit</a>
Additional Payment Receipt or Refund Notification	<a href="#">Edit</a>
Cases - Send Copy of an Activity	<a href="#">Edit</a>
CDN Tax Receipts - Email Annual/Aggregate Receipt	<a href="#">Edit</a>
CDN Tax Receipts - Email Single Receipt	<a href="#">Edit</a>
CDN Tax Receipts - Thank you Note	<a href="#">Edit</a>
Contributions - Duplicate Organization Alert	<a href="#">Edit</a>
Contributions - Invoice	<a href="#">Edit</a>

## 6. You will then be able to edit the default Tax Receipt email:

**Edit Message Template**

**Message Title \*** 
  
Descriptive title of message - used for template selection.

**Source**  Compose On-screen  Upload Document
   
Compose a message on-screen for general use in emails or document output, or upload a pre-composed document for mail-merge.

**Message Subject**  [Merge Fields](#)

[HTML Format](#) [?](#)
[Merge Fields](#) [?](#)

```
(capture assign=headerStyle,colspan="2" style="text-align: left; padding: 4px; border-bottom: 1px solid #999; background-color: #eeee/(capture) (capture assign=labelStyle )style="padding: 4px; border-bottom: 1px solid #999; background-color: #f7f7f7/(capture) (capture assign=valueStyle )style="padding: 4px; border-bottom: 1px solid #999/(capture)
```

{contact\_email\_greeting\_display},

Attached please find your official tax receipt for income tax purposes.

{OrgName}

An HTML formatted version of this message will be sent to contacts whose Email Format preference is 'HTML' or 'Both'.

[Plain-Text Format](#)

[PDF Page Format](#)

[?](#)
  
Page format to use when creating PDF files using this template.

**Note:** When making changes to the html format area, please only edit within the dotted-lined box.

- **Message Title:** internal name to help you manage your Default Templates. This name won't show up to Contacts.
- **Message Subject:** Email Subject title that will appear to your Contacts.
- **HTML Format:** edit this Default Email within the dotted line.
- **Plain-Text Format:** edit this Default Email using basic text formatting for Contact emails that don't support rich text. We recommend having the same message here as in HTML Format.
- **Merge Fields:** cycle through a list of merge fields to help you when sending emails / merging letters (e.g. "Hi *contact.first.name*") on **Message Subject, HTML Format & Plain-Text Format.**
- **PDF Page Format:** leave *default* selected for better PDF merge.

7. When ready, select **Save** to finish or **Save and Done** to finish and go back to the Message Templates page.

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## What's Next?

Now that you've completed all 3 steps to configure your DMS tax receipts, you can [preview your receipts](#), or go ahead and start [issuing tax receipts](#).