

Modifying the Default Tax Receipt Thank You Note

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Donor Management System

Your DMS-issued tax receipts come pre-set with a default tax receipt Thank-You note located at the top of all tax receipts (regardless of type). **This article will cover how to modify the Thank You Note at the top of the Tax Receipt itself.**

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

Considerations

- **Be sure to update both the French and English Thank You Notes** so your messaging is consistent for all your donors.
- **You will still have to [Thank your Donor](#)** in order to flag a Contribution as “Thanked”.
- **The same Tax Receipt Thank You Note will be used** for issuing, re-issuing and cancelling Tax Receipts. You can’t use different Thank You Notes for each different action at this moment.
- **To update your phone and email**, you will need to [modify your Organization Information](#).
- The HMTL Editor for the default Thank You Note only supports Source Code editing at this moment and not rich-text editing as seen on [Email Templates](#).

Default Thank-You Note

The default Thank You Note sent through the DMS looks something like this. You can choose to use the default message or modify it:

WELLNESS AVENUE FOUNDATION
186 Spadina Avenue
Toronto



John Raisin
186 Spadina Ave
Toronto, ON
M1M 1M1, Canada

Dear John Raisin,

Thank you for giving generously. Your support is critical to helping us fulfill our mission.

To assist with your record keeping, please find your official tax receipt. If you have questions about your contribution, please email tuckey@canadahelps.org or call 416-628-6948.

Thank you,
Wellness

Official Tax Receipt For Income Tax Purposes

WELLNESS AVENUE FOUNDATION
Charitable Registration #: 10000-000-RR0000
186 Spadina Avenue
Toronto



Receipt #: WAF00000566
Receipt Issued: 2021-12-17
Location Issued: boop2, Ontario
Donation Received: 2021-12-17
Donation Amount: \$2,000.00
Eligible Amount of Gift: \$2,000.00

Donated by:
John Raisin
186 Spadina Ave
Toronto, ON
M1M 1M1, Canada

Description of Property Received: Computer equipment
Fair Market Value Appraised by: Appraiser
Address of Appraiser: 123 Pretend St Toronto ON

Authorized Signature

Default Receipt Thank You

Modifying the Default Thank You Note

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*

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

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

5. Select **Edit** for **CDN Tax Receipts – Thank you Note (for English)/ (French) CDN Tax Receipts - Thank you Note**

Message Templates

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.

Workflow

(French) CDN Tax Receipts - Email Annual/Aggregate Receipt	Edit
(French) CDN Tax Receipts - Email Single Receipt	Edit
(French) CDN Tax Receipts - Thank you Note	Edit
Additional Payment Receipt or Refund Notification	Edit
Cases - Send Copy of an Activity	Edit
CDN Tax Receipts - Email Annual/Aggregate Receipt	Edit
CDN Tax Receipts - Email Single Receipt	Edit
CDN Tax Receipts - Thank you Note	Edit
Contributions - Duplicate Organization Alert	Edit

6. You will then be able to **edit the default Tax Receipt Thank You Note**:

Message Templates

Use this form to add or edit re-usable message templates. ?

Edit Message Template

Save Save And Done Cancel

Message Title CDN Tax Receipts - Thank you Note
Descriptive title of message - used for template selection.

Source (x) 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

HTML Format ?

Source | | Styles | Format

Dear (contact.display_name),
Thank you for giving generously. Your support is critical to helping us fulfill our mission. To assist with your record keeping, please find your official tax receipt. If you have questions about your contribution, please email (domain.email) or call (domain.phone).
Thank you,
(domain.name)

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

Plain-Text Format

Dear (contact.display_name),
Thank you for giving generously. Your support is critical to helping us fulfill our mission.
To assist with your record keeping, please find your official tax receipt. If you have questions about your contribution, please email (domain.email) or call (domain.phone).
Thank you,
(domain.name)

Text formatted message.

PDF Page Format

- default -

Page format to use when creating PDF files using this template.

Save Save And Done Cancel

Update the default Tax Receipt Thank You Note

- **Message Subject:** please leave this field as is and don't change its content.
- **HTML Format:** edit the content on this field with your desired message. The format is restricted to a 360-character limit and 4 paragraphs maximum.
- **Plain-Text Format:** please leave this field as is and don't change its content.
- **Merge Fields:** cycle through a list of merge fields to help you when sending emails / merging letters (e.g. "Hi *contact.first.name*") on **HMTL Format**

- **PDF Page Format:** leave *default* selected for better PDF merge.

Note: To update your phone and email, you will need to [modify your Organization Information](#).

7. Update your Thank You Note under the **HTML Format** box and leave the *Plain-Text Format* box blank.
 8. 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 configured your tax receipts' Thank-you Note, the final step is to [modify the Default Tax Receipt Emails](#).