Modifying the Default Tax Receipt Thank You Note

Last Modified on 01/26/2024 10:14 am EST

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

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

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

Authorized Signature

Default Receipt Thank You

Modifying the Default Thank You Note

1. Visit your **administrative Settings**.

2. Under *Communications*, select *Message Templates*

Settings > Message Templates

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

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*

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

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.

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.

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.