Customizing Your DMS: Basic Steps

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Donor Management System

Once you've had your Kick-Off Call with your Onboarding Expert, follow these next steps to configure your charity information so you can start using the system.

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Donor Communications

1. If you haven't done so already, connect your email to the DMS.

Note: If you didn't provide a **From Email Address** during your Kick-Off call, please email your Onboarding Expert with this information first.

2. Manage your Email & Letter Templates

Tax Receipting

1. Configure your Tax Receipts by adding your organization's legal information and branding

2. Tax Receipt Message: modify the thank you note that appears at the top of each Tax Receipt

3. Tax Receipt Emails: edit the default email message that Contacts receive with their Tax Receipts

4. Preview Tax Receipts before issuing them for the first time

Basic Charity Information

1. Add your organization's Fiscal Year so you can filter reports by calendar or fiscal year.

2. Modify your basic organization information such as name, address, and contact information.