

# Connect your Email to the DMS

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## Donor Management System

Emails through the DMS are powered by our trusted partner [SendGrid](#), the biggest and most secure email provider in the industry. But, in order to perform basic functions like sending emails and tax receipts, you'll just need to connect **one primary organization email address** to your DMS. This email will be considered **your DMS From Email**.

The article below covers how to set up and verify your charity's *DMS From Email* through Sendgrid.

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## Choose a From Email Address

During your Kick-Off call (or shortly after), let your Onboarding Expert know which email address you'd like to connect to your DMS.

Your DMS From Email (outbound email) is donor-facing, meaning that it will display when issuing Tax Receipts by Email and other email communications (i.e. [Thanking your Donor](#) and [Bulk Emails](#)) and they will be able to reply back.

With this in mind, please consider which email address within your organization will best represent you in your donor communications. We usually recommend using a general inquiries email address that you may already be using for donor communications, such as [info@charityname.ca](mailto:info@charityname.ca).

And, in order to align with your charity branding, we also recommend sharing an email address that is associated with your existing charity domain (the address of your website, often ending in [.ca](#), [.com](#), or [.org](#)).

If you don't have a customized domain email address, such as [info@charityname.ca](mailto:info@charityname.ca) -don't worry! Your Onboarding Expert will provide an alternative.

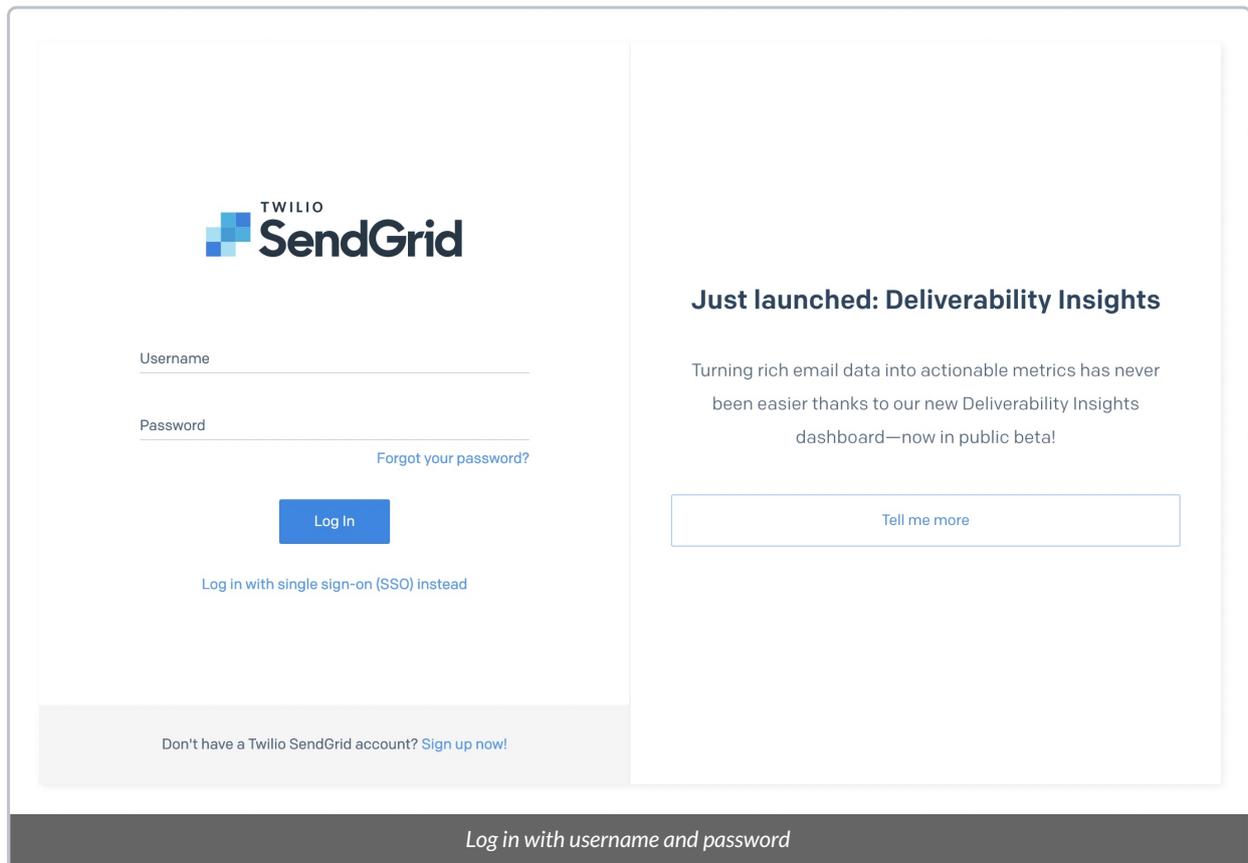
**Have more questions about the DMS From Email? [Check out our FAQ!](#)**

# Configure your From Email in Sendgrid

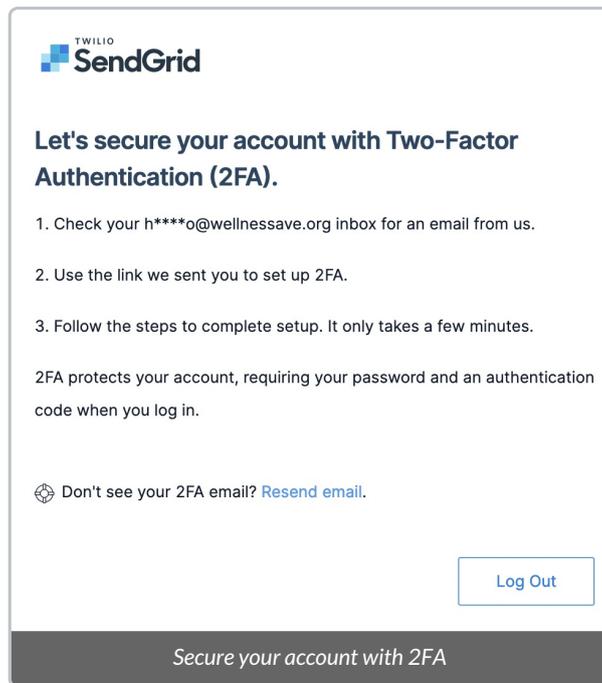
After sharing the email address you'd like to connect to your DMS, you'll receive an email from CanadaHelps to that address containing a **username and password** that you can use to sign into SendGrid and verify your *DMS From email address*.

1. You'll receive an email from CanadaHelps to your **preferred charity email** with the subject line "Action Required: Set up your CanadaHelps DMS email"

2. Click on the SendGrid link within the email and log in using the username and password provided.

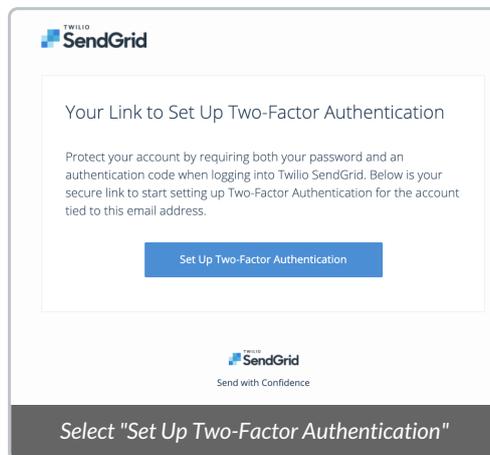


3. Next, you'll be prompted to set up 2-Factor Authentication for added security (see below).



## Enable Two-Factor Authentication

1. An email will be sent to your **preferred charity email**
2. Select the **Set Up Two-Factor Authentication** button in the email to begin the process



3. On the new page, select **text messages (SMS)** as the means of authentication and enter the **country code and phone number of a mobile phone you'll have regular access to**

**SendGrid**

Welcome back!

Add Two-Factor Authentication ⓘ

1 Select Method   2 Configure   3 Confirm

Authy App  
Authy generates a 7 digit time-based one-time-password every 20 seconds.

- Relies on a phone number.
- Allows access to your account when you are not connected to a cellular network.

Text Messages (SMS)  
Receive a confirmation code via text message on your mobile phone upon login.

- Relies on a phone number.
- You will not be able to log in when cellular service is unavailable.

Log Out   Next

Select Text Message (SMS)

**SendGrid**

Welcome back!

Add Two-Factor Authentication: SMS ⓘ

1 Select Method   2 Configure   3 Confirm

Enter your mobile number

We will use this number to send you a text message with a confirmation code.

Country Code  
USA (+1)

Mobile Phone Number

Back   Next

Add your Mobile Phone Number

4. A text message (SMS) containing a **code** will be sent to your phone number. The code must be entered on the screen where/when prompted to.

**SendGrid**

Welcome back!

Add Two-Factor Authentication: SMS ⓘ

1 Select Method   2 Configure   3 Confirm

Enter your code

We just sent a 7-digit code to [REDACTED]

Authentication code

Back   Save

Input your Authentication code

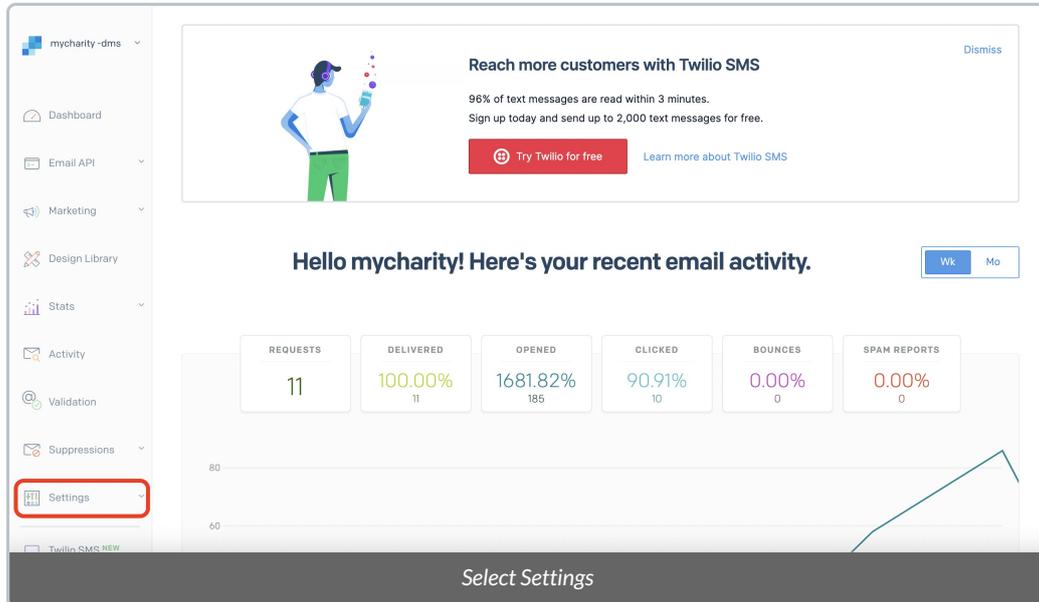
5. Two-Factor Authentication is complete! You'll simply be prompted to login to SendGrid one more time using the username and password provided in the original email from CanadaHelps

**Note:** you'll just need to go through the Two-Factor Authentication step (entering the code provided via SMS).

# Verify Your Email Address

Once you're logged into SendGrid, before you can begin sending emails in the DMS, the final step to complete the email verification process is to trigger a verification email.

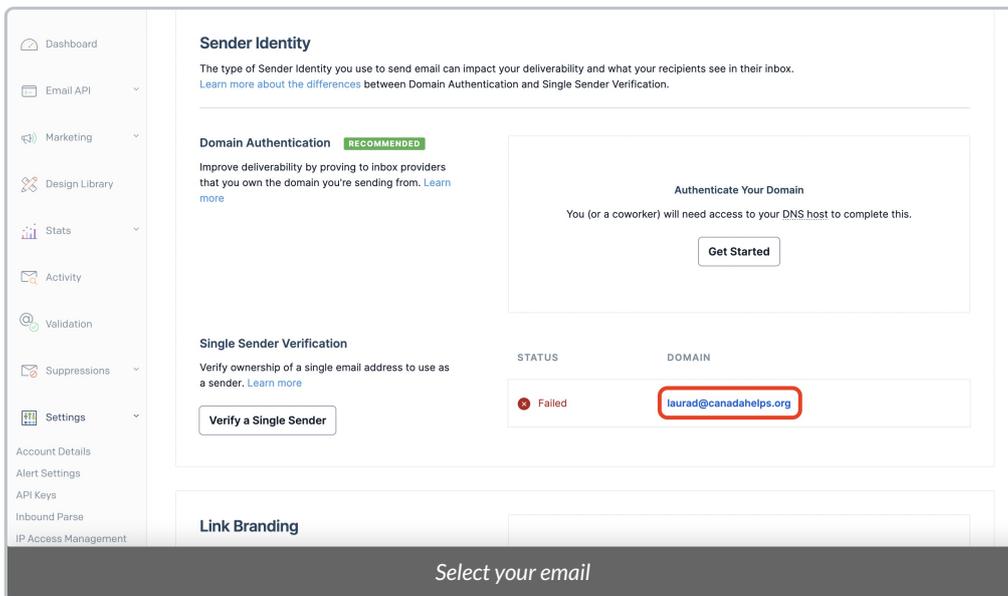
1. From the SendGrid home page, navigate to **Settings**



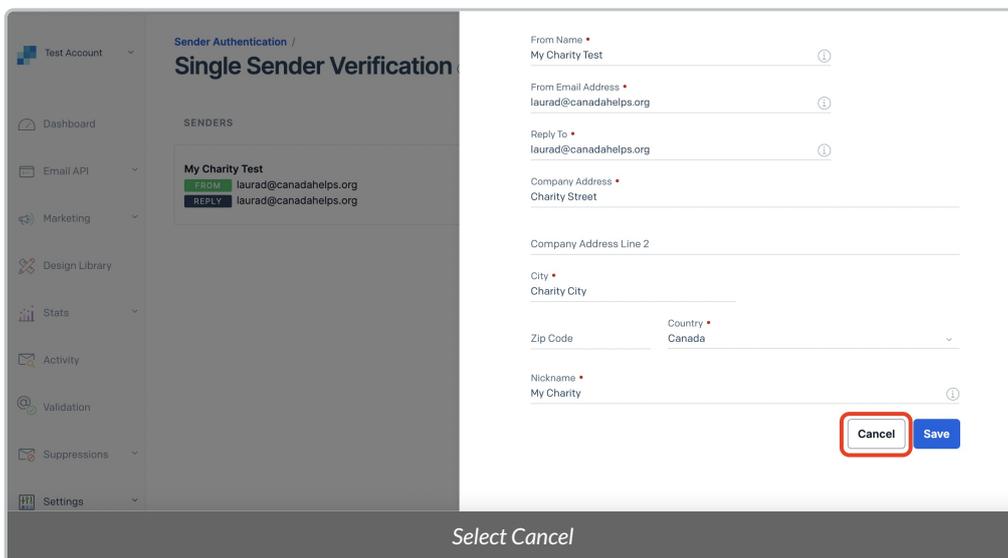
2. From there, select **Sender Authentication**



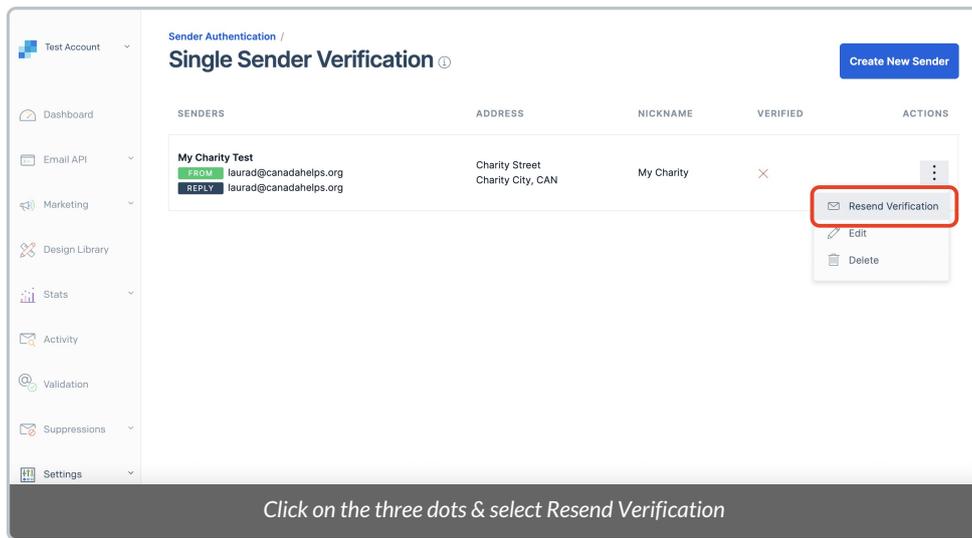
3. On the next page, select your email address under **Single Sender Verification**



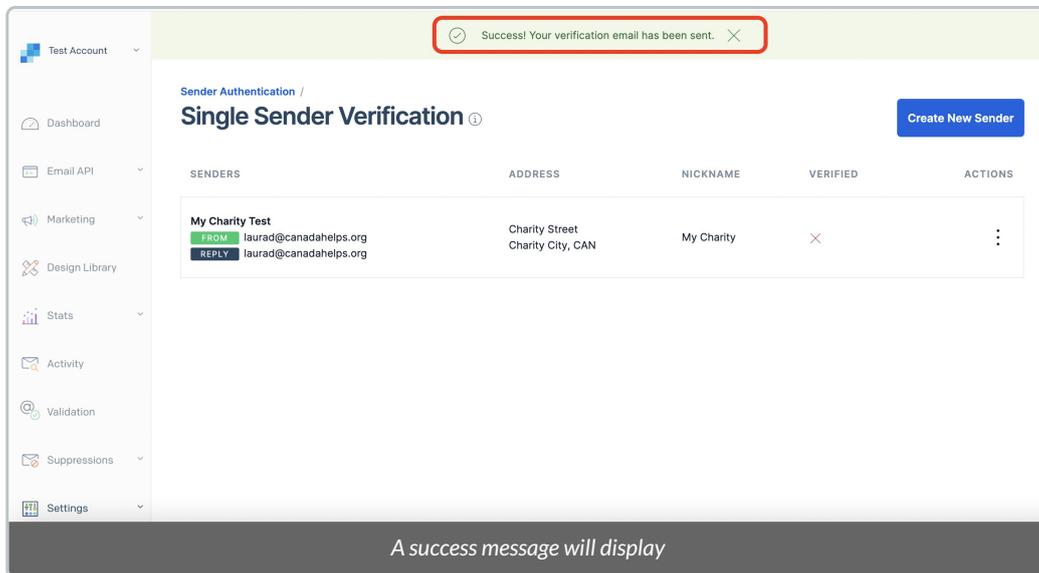
4. On the page that will open up, select **Cancel**.



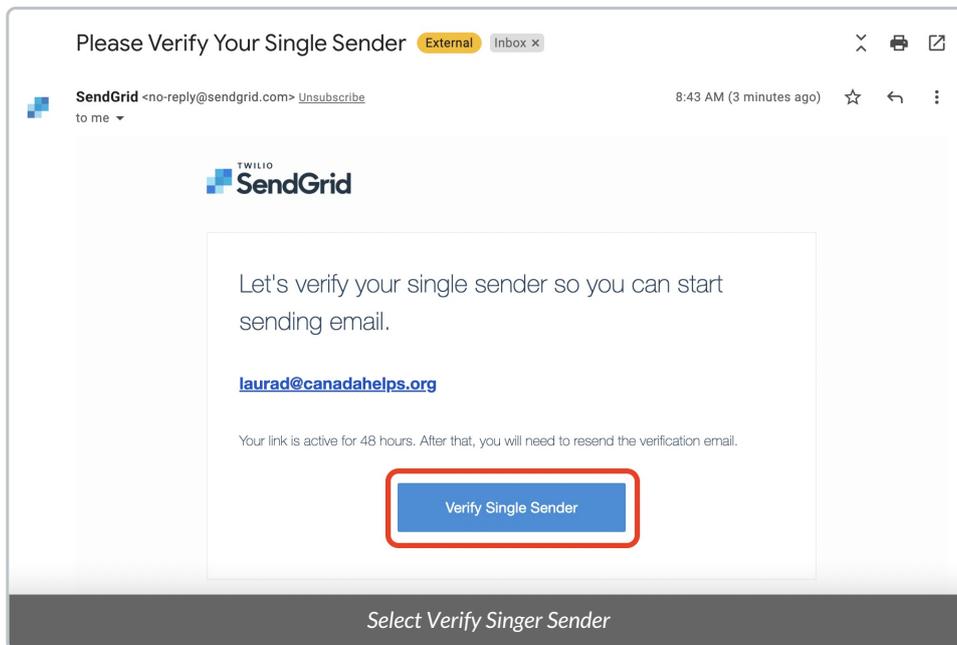
5. Select the three dots that appear to the right of the page (under **Actions**) and select **Resend Verification**



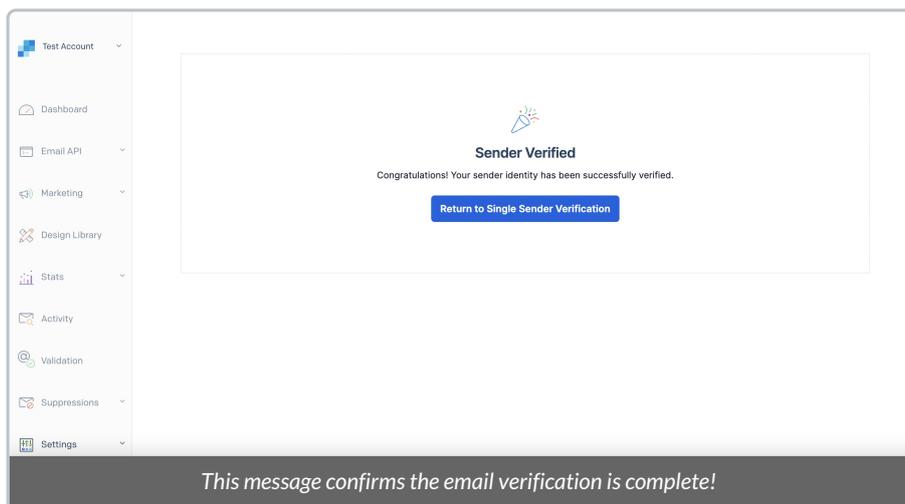
6. When done, you'll see a success message at the top of your screen.



7. You'll then receive one final email to your preferred charity email. Open this email and click the **Verify Single Sender** button



8. You'll be directed back to SendGrid where you'll see a message letting you know that you've successfully verified your sender identity and that the verification process is complete.



**Need a little more support with this process? Not to worry! Your onboarding expert will make sure everything is set up for success during your Configuration Call.**

## What's Next?

Once your From Email has been verified, you'll have full access to the standard features of the DMS! Check out our articles below and start learning how to:

- [Issue Tax Receipts](#)
- [Communicate with your Donors \(Bulk Email, Saying Thanks, Single Email\)](#)