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*.

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 -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.

	Just launched: Deliverability Insights
Username Password Forgot your password? Log In Log in with single sign-on (SSO) instead	Turning rich email data into actionable metrics has never been easier thanks to our new Deliverability Insights dashboard—now in public beta! Tell me more
Don't have a Twilio SendGrid account? Sign up now!	
I:	we are and account

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

SendGri	d
Your Link	to Set Up Two-Factor Authentication
Protect your a authenticatio secure link to tied to this er	account by requiring both your password and an n code when logging into Twilio SendGrid. Below is your start setting up Two-Factor Authentication for the accoun nail address.
	Set Up Two-Factor Authentication
	Je SendGrid
	Send with Confidence

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**



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.

Welcome back!	
Add Two-Factor Authentication: SMS 🗓	
Select Method Configure Confirm	
Enter your code We just sent a 7-digit code to	
Authentication code	
Back	ave
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

The type of Sender Identity you use to send email can impact your deliverability and what your recipients see in their inbox. Learn more about the differences between Domain Authentication and Single Sender Verification. Marketing Marketing Domain Authentication Besign Library Istats Activity Validation Single Sender Verification Single Sender Verification Validation Suppressions Validation Suppressions Validation Suppressions Verify ownership of a single email address to use as as ender. Learn more Verify a Single Sender Verify a Single Sender	Dashboard		Sender Identity	
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Activity Velidation Suppressions Suppressions Verify ownership of a single email address to use as a sender. Learn more Settings Verify a Single Sender Verify a Verify a Single Sender Verify a Veri	ij Stats	×		You (or a coworker) will need access to your <u>DNS host</u> to complete this. Get Started
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4. On the page that will open up, select *Cancel*.

Test Account	Sender Authentication / Single Sender Verification	From Name • My Charity Test
🔗 Dashboard	SENDERS	laurad@canadahelps.org
🗩 Email API	My Charity Test FROM laurad@canadahelps.org REPLY laurad@canadahelps.org	Company Address • Charity Street
Marketing Design Library		Company Address Line 2
Stats		City • Charity City
C Activity		Zip Code Canada ~
O Validation		Nichamo • My Charity
Suppressions		Cancel
Htll Settings	v	
	S	elect Cancel

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

Test Account	÷	Sender Authentication / Single Sender Verification ()				Create New Sender
🔗 Dashboard		SENDERS	ADDRESS	NICKNAME	VERIFIED	ACTIONS
Email API ≼∌) Marketing	~ ~ ~	My Charity Test FROM laurad@canadahelps.org REPLY laurad@canadahelps.org	Charity Street Charity City, CAN	My Charity	×	Resend Verification
Design Library					L	C Edit
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Settings	×	Click on the three dot	s & select Rese	nd Verification		

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

Test Account ~	\bigcirc Success! Your verification email has been sent. $ imes$				
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Suppressions ×					
Settings ~					
A success message will display					

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.

ſ	Test Account V	
	🙆 Dashboard	<i>K</i> e
	Email API Y	Sender Verified Congratulations! Your sender identity has been successfully verified.
	<€) Marketing ~	Return to Single Sender Verification
	Design Library	
	C Activity	
	© _ Validation	
	Suppressions Y	
	HT Settings ~	This message confirms the email verification is complete!
	Imarketing Imarketing Imarketing Imarketing Imarketing Imarketing Imarketing Imarketing Imarketing Imarketing Imarketing Imarketing	Return to Single Sender Verification This message confirms the email verification 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)