

Thanking Donors in Bulk Based on Dedication

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Donor Management System

Want to learn more about this feature?

Watch our Training Webinars
here

Your donors may contribute to your organization with a dedication, which can be tracked within the DMS as *in memory of* or *in honour of* someone.

You can personalize a [Thank You email template or letter template](#) to acknowledge the dedication, which can be done **in bulk**. Alternatively, you can also send Thank You Emails at the same time as Tax Receipts.

Once a donor is thanked, the message is tracked as an Activity in your DMS. [Learn more about Activities here.](#)

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1. Build a Thank You Template with Dedication

1.1 Email Template

1. In your *administrative Settings*, first [Clone an existing Message Template](#).

2. Assign a unique title for your Message Template, which will be used for template selection.

Edit Message Template

Message Title *

Descriptive title of message - used for template selection.

Source 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

Subject for email message. Tokens may be included ([token documentation](#)).

Add a unique title to your Message Template

3. Assign a Message Subject, such as "Thank you for your recent donation".

Edit Message Template

Message Title *

Descriptive title of message - used for template selection.

Source 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.

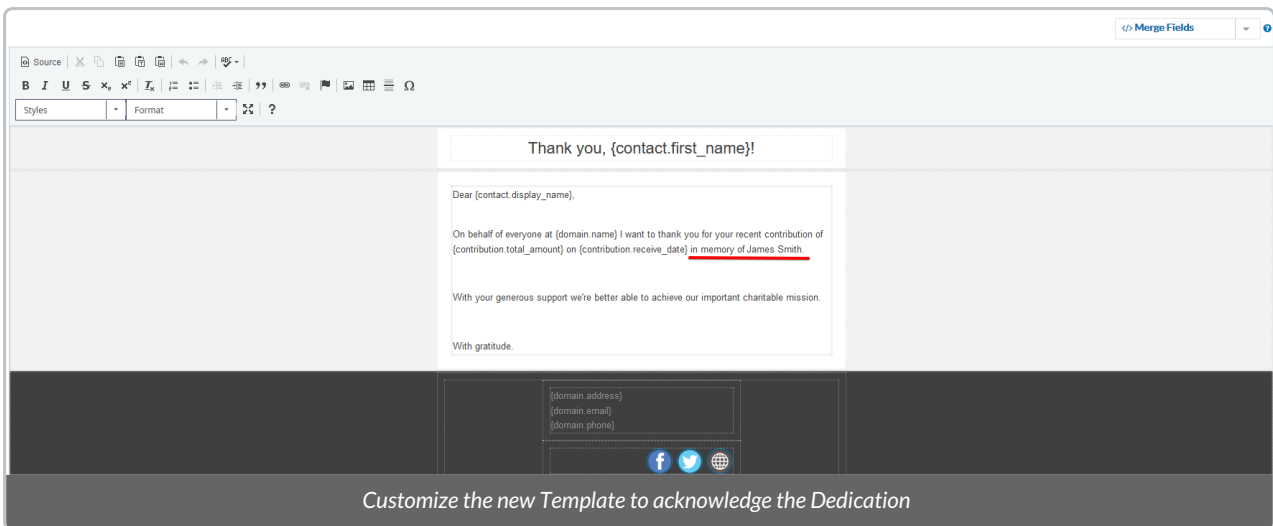
Message Subject

Subject for email message. Tokens may be included ([token documentation](#)).

Add a subject that will send with your Thank You Email

Note: This subject will only appear when performing the **Action: Say Thanks - Print or Email** and **sending emails where possible**. Merge Fields are not available within the Email Message subject at this time.

4. **Personalize the Message Template** so that it reflects an acknowledgement of the dedication, including the name of the honouree.



5. Select **Save**.

1.2 Letter Template

1. Visit your **administrative Settings**.
2. Under **Communications**, select **Message Templates**.

The screenshot shows the 'Administer CanadaHelps DMS' settings page. The top navigation bar includes 'Wellness Avenue' logo, 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', 'DMS Mail', 'Settings', and 'Help'. A dropdown menu shows 'DMSCA DMSCA'. The main content area is titled 'Administer CanadaHelps DMS' and contains several sections: 'Customize Data and Screens' (with links for Website Forms, Activity Types, Communications, and Message Templates), 'Localization' (with Date Formats), 'System Settings' (with Payment Processor Settings, Misc, Import/Export Mappings, and Receipt Settings), 'CanadaHelps Contribute' (with Manage Campaigns, Funds, GL Accounts, and Manage Groups), 'CanadaHelps Campaign Group' (with Campaign Groups), 'DMS Mail' (with Headers, Footers, and Automated Messages, From Email Addresses, Mailchimp Settings, DMS Templates, and Draft, Schedule, and Manage DMS Mails), and 'Print Page (PDF) Formats'. A blue question mark icon is visible on the right side of the System Settings section. The breadcrumb at the bottom reads 'Settings > Message Templates'.

3. Select **Add Message Template**.

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	{contactfirst_name}, thank you!	Yes	Edit	Disable	Delete

Select Add Message Template

4. Give your Template a name for internal use in the **Message Title** field. Utilize **Merge Fields** for Contact names and Contribution details so that each letter populates with unique information.

[Learn more about Merge Fields here.](#)

Save | Save And Done | Cancel

Message Title* Dedication Letter for Printing

Source: (x) Compose On-screen | Upload Document

Message Subject Merge Fields

HTML Format Merge Fields

Give your Template a title. Use Merge Fields to customize your Letters

5. Use the text box to draft your thank you Letter, including the dedication information.

Insert Horizontal Line



Pick Font Style and Font Size

6. Select **Save**.

2. Segment your Dedication Contributions

In order to [Thank your Donors in bulk via the Tax Receipting process](#) or as a [separate Action](#), segment your Contributions by dedication information. For example, you may want to view:

1. All Contributions with the In Memory of field checked
2. All Contributions with the In Honour of field checked
3. All Contributions dedicated to a specific Honouree name
4. Limited results by Contribution Received Date, Campaign, Contribution Source, etc.

All scenarios can be searched within the [Advanced Search button of the Contributions Tab](#).

1. In the **Contributions Tab**, select **Advanced Search**.

2. Under the Dedication Information section, add in your preferred search criteria. For example:

In Memory of: YES

Name of Honouree: James Smith

Add more [Advanced Search](#) criteria to segment your search further.

Important: In Memory Of and In Honour Of fields would not both be checked on and are considered to be mutually exclusive. Generally, a contribution will be either *In Memory Of* or *In Honour Of*. To see both *In Memory Of* and *In Honour Of* contributions, please perform 2 separate Advanced Searches.

^ **Dedication Information**

IN MEMORY OF

IN HONOUR OF

NAME OF HONOREE

MESSAGE

Add your Dedication Search Criteria

Note: Search for a full name within the Name of Honouree field.

3. Select **Search**.

3. Communicate with your Donors in Bulk

Next, we can acknowledge these dedication contributions in multiple ways. We can either:

1. Thank donors by Email with their Tax Receipt attached
2. Thank donors as a separate Action by Email
3. Thank donors as a separate Action by generating a MailMerge document for printing

3.1 Thank donors by Email with their Tax Receipt attached

1. After segmenting our Contribution list by Dedication information, select All Records in your search, and select **Actions**. Under Actions, select *Issue Separate Tax Receipts*.

Actions ▾ 0 Selected Records Only All 53 Records

- Export Contributions
- Issue Aggregated Tax Receipts
- Issue Separate Tax Receipts**
- Send Thank You

	Name	Amount	Fund	Campaign
<input type="checkbox"/>	Benjamin Franklin	\$1.23	Fitness	Bottle Drive
<input type="checkbox"/>	Benjamin Franklin	\$1.23	Fitness	Bottle Drive
<input type="checkbox"/> March 1st, 2023 05:26 PM	Rahmani Tamara	\$20.00	General Fund	Fundraising for peace
<input type="checkbox"/> March 1st, 2023 01:52 AM	Noboru K	\$1.00	2023	Monthly Giving Webinar

Issue Tax Receipts

2. Select *Send a custom Thank You Email Message*. Select your preferred Dedication message template from the menu.

Receipts Details

You have selected 3 contributions. Of these, 3 are eligible to receive tax receipts.

Not Yet Received 3 Already Received 0

Thank You Settings

- MARK CONTRIBUTION AS THANKED
- SEND A CUSTOM THANK YOU EMAIL MESSAGE
 - Thank you - Dedication message

HTML Format

Merge Fields

Source | X | Copy | Paste | Undo | Redo | Bold | Italic | Underline | Text Color | Background Color | Bulleted List | Numbered List | Indent | Outdent | Link | Unlink | Table | Table Border | Table Cell | Table Row | Table Col | Table Merge | Table Split | Table Delete | Table Insert | Table Move | Table Copy | Table Paste | Table Undo | Table Redo | Table Help

Styles | Format | ?

body

Thank you, {contact.first_name}!

Dear {contact.display_name},

On behalf of everyone at {domain.name} I want to thank you for your recent contribution of {contribution.total_amount} on {contribution.receive_date} in memory of James Smith.

?

3. Ensure that the Delivery Method selected is *Email*. Select *Issue Tax Receipts*.

Delivery Preference

ALSO RE-ISSUE DUPLICATES

METHOD Email ▾

Back Preview **Issue Tax Receipts**

Select Email Delivery Method and Issue Tax Receipts

3.2 Thank donors as a separate Action by Email

1. After segmenting our Contribution list by Dedication information, select All Records in your search, and select **Actions**. Under Actions, select **Send Thank You**

2. Choose your preferred method of communication from the Print and Email Option menu to send emails where possible.

Thank You Letter(s) for Contribution(s)

Number of selected contributions: 3

^ **Thank-you Letter Options**

UPDATE THANK-YOU DATES FOR THESE CONTRIBUTIONS

PRINT AND EMAIL OPTIONS: Send emails where possible. Generate printable PDFs for contacts who cannot receive email. (selected)

FROM EMAIL ADDRESS * [Empty]

USE TEMPLATE: - select -

EMAIL/ACTIVITY SUBJECT: [Empty]

Page Format: Default PDF Format

^ **Preview Document**

Select your preferred "Send emails where possible" option

3. Select the Email Template to send. Then, select **Make Thank-you Letters**.

USE TEMPLATE: Thank you - Dedication message

EMAIL/ACTIVITY SUBJECT: Thank you for your recent donation, {contact.display_name}

Page Format: Default PDF Format

Document Body

Merge Fields

Source | X | [Icons] | B I U S X | [Icons] | Styles | Format | [Icons] | ?

Thank you, {contact.first_name}!

Dear {contact.display_name},

On behalf of everyone at {domain.name} I want to thank you for your recent contribution of {contribution.total_amount} on {contribution.receive_date} in memory of James Smith.

body

Update Template
 Save As New Template

DOCUMENT TYPE: Portable Document Format (.pdf)

Make Thank-you Letters Done

Select the Dedication Email Template and Make Thank-you Letters

Note: Within the text box, you can make further modifications to the template before sending. Select **Update Template** if you have made changes to the Template that you would like to save for next time. Select **Save As New Template** if you have made changes to the Template and would like to save a separate copy.

3.3 Thank donors as a separate Action by generating a MailMerge document for printing

1. After segmenting our Contribution list by Dedication information, select All Records in your search, and select **Actions**. Under Actions, select **Send Thank You**.

The screenshot shows a user interface for managing records. At the top, there is an 'Actions' dropdown menu. Below it, there are radio buttons for '0 Selected Records Only' and 'All 53 Records', with 'All 53 Records' selected. The 'Actions' menu is open, showing options: 'Export Contributions', 'Issue Aggregated Tax Receipts', 'Issue Separate Tax Receipts', and 'Send Thank You'. The 'Send Thank You' option is highlighted with a red border. In the background, a table lists records with columns for 'Name' and 'Date/Time'. The records shown are: Benjamin Franklin (March 1st, 2023 05:26 PM), Rahmani Tamara (March 1st, 2023 01:52 AM), and Noboru K (March 1st, 2023 01:52 AM). At the bottom, there is a footer that says 'Select Say Thanks - Print or Email'.

2. Select **"Generate PDFs for printing (only)"**. Select your Letter Template from the menu.

The screenshot shows a form titled 'UPDATE THANK-YOU DATES FOR THESE CONTRIBUTIONS'. The form has several sections: 'PRINT AND EMAIL OPTIONS' with a dropdown menu set to 'Generate PDFs for printing (only)'; 'FROM EMAIL ADDRESS' with a dropdown menu set to 'Wellness Ave. <wellnessave@canadahelps.ca>'; 'USE TEMPLATE' with a dropdown menu set to 'Dedication Letter for Printing'; and 'EMAIL/ACTIVITY SUBJECT' with a text input field. Below these sections, there is a 'Page Format: Default PDF Format' section and a 'Document Body' section. The 'Document Body' section contains a rich text editor with a toolbar and a preview area. The preview area shows the 'Wellness' logo and the text 'Select your preferred letter template for printing'. At the bottom right, there is a 'Merge Fields' button and a help icon.

3. Select **Make Thank-you Letters** to generate a PDF file for printing.

The screenshot shows a web editor interface. At the top, there is a toolbar with icons for source, cut, copy, paste, undo, redo, and text color. Below the toolbar is a rich text editor with buttons for bold (B), italic (I), underline (U), strikethrough (ABC), subscript (x₂), superscript (x²), text color (I_x), bulleted list, numbered list, link, unlink, quote, link, flag, image, table, and help. Below the editor is a text area containing the following text: "With gratitude.", "{domain.name}", "{domain.address}", "{domain.email}", and "{domain.phone}". Below the text area is a section labeled "body" with two checkboxes: "Update Template" and "Save As New Template". Below the checkboxes is a "DOCUMENT TYPE" dropdown menu set to "Portable Document Format (.pdf)". At the bottom, there are two buttons: "Make Thank-you Letters" (highlighted with a red border) and "Done". A dark grey footer bar at the bottom contains the text "Select Make Thank-you Letters to generate for printing".

Note: Within the text box, you can make further modifications to the template before sending. Select **Update Template** if you have made changes to the Template that you would like to save for next time. Select **Save As New Template** if you have made changes to the Template and would like to save a separate copy.



186 Spadina Avenue
Toronto, ON M5T 3B2
Canada

kirsten@wellness.org
111-555-5555

Dear Adam Anderson,

On behalf of everyone at Wellness Avenue I want to thank you for your recent contribution of \$ 100.00 on Mar 2nd, 2022 9:50 AM in memory of James Smith.

With your generous support we're better able to achieve our important charitable mission.

With gratitude.

Wellness Avenue
186 Spadina Avenue
Toronto, ON M5T 3B2
Canada

kirsten@wellness.org
111-555-5555

PDF copy of Thank You Letter

4. Next, learn how to generate Mailing Labels for printing in your DMS.