Connect your Email to the DMS - Frequently Asked Questions

Donor Management System

What is a From Email in the DMS?

Check out our article to learn about your DMS From Email and what to consider when selecting the right *From Email* for your organization.

Can I have more than one From Email Address in my DMS?

Yes, you can! Check out our article on Adding Additional From Email Addresses via Sendgrid.

Can I see replies in my inbox?

Once you connect your private email to your DMS, you'll be able to send and receive tax receipts and other email communications to your donors directly in the system.

If a donor replies to an email initiated in the DMS, you will have the option to direct replies either:

- Directly to your DMS, **or**
- Your private email inbox.

Option 1: Manage DMS replies within the DMS

When choosing this option, you'll be able to view all replies and reply back within your Home Page, tracking all of these replies as Contact Activities.

Learn more about answering replies here.

1. Your Onboarding Expert will send you a link where you will input your email details.

2. Select **Edit** on the "Email-to-activity" mail account.

3. Provide your sign-in details for **"Server"** and **"Password"**, then **Save.**

- This password is the same one you would use to sign in to your inbox (i.e. Gmail, Outlook).

Option 2: Manage all DMS emails within your Inbox

No action is required from you. You will be able to manage all replies within your regular inbox.

Should I manage replies in my inbox or in the DMS?

Both are great options, depending on your needs as an organization!

If you want to store your emails all together in your charity inbox or forward replies to additional inboxes, we suggest managing replies in your inbox.

But if it's important for you to track all your emails as **Activities** within the DMS for continuity, you may prefer to receive your replies in the DMS instead.

Can we redirect replies to different inboxes instead of them all going to go to our general inbox?

If you've chosen to manage your DMS replies in your **private email inbox,** you can apply email filters, or rules, to redirect replies to different inboxes (i.e. within your organization).

Learn to apply Filters in Gmail here.

Learn to apply Rules in Microsoft Outlook here.

Where do I find the emails after sending them through the DMS?

All emails initiated within the DMS are tracked in the DMS as Activities associated with each Contact/Email Recipient.

The emails initiated within the DMS **will not** appear in the Sent folder of your charity inbox.

Learn more about Activities here.

Learn to generate a delivery summary for your Bulk Emails here.

Should I verify my domain in Sengrid?

We often recommend charities complete the domain authentication in Sendgrid to help increase the chances of their emails being accepted by various email inbox providers. Click here to learn more.

How do I reset my 2-Factor Authentication in Sengrid?

If you lose access to the phone number through which you originally set up 2-Factor Authentication (2FA) for your Sendgrid account, you'll need to submit a request to Sendgrid reset your 2FA through this form.