# Adding an additional From Email to your DMS

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#### **Donor Management System**

You may have multiple emails that you would like to connect to your DMS so that you can send communications to your donors from a variety of email addresses. In this case, you'll need to add an additional *From Email Address* to your DMS and verify it through our email partner, SendGrid.

As a reminder, any **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).



Have more questions about the DMS From Email? Check out our FAQ!

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### Login to Your SendGrid Account

As a reminder, in the first few days of your Onboarding, you will have received SendGrid credentials via email from your Onboarding Specialist or a noreply@canadahelps.org email address.

If you don't have these credentials:

- Please reach out to your onboarding expert if you are still in the onboarding period,
- Or if you have completed your onboarding, contact our Support Team at info@canadahelps.org and so we can provide you with these credentials.

1. Begin by visiting SendGrid and logging in using the SendGrid credentials provided in your original SendGrid

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

2. If you had previously set up Two-Factor Authentication on your account, a code will be sent via SMS to the phone number associated with your SendGrid account.

3. Enter this code as prompted and skip to <u>Step 2.</u>

Two-Factor Authentication
'our account is protected with two-factor authentication. We've s ou a text message. Please enter the code below.
Two-Factor Code
Continue
tesend code via text message >

Note: If you had not set up Two-Factor Authentication previously, you'll need to set this up for added security.

### Enable Two-Factor Authentication

1. An email will be sent to your original (first) DMS From Email

2. Select the Set Up Two-Factor Authentication button in the email to begin the process

SendGrid	l
Your Link	to Set Up Two-Factor Authentication
Protect your ac authentication secure link to s tied to this em	count by requiring both your password and an code when logging into Twilio SendGrid. Below is your tart setting up Two-Factor Authentication for the account ail address.
	Set Up Two-Factor Authentication
	SendGrid
	Send with Confidence
Select "Se	t Up Two-Factor Authentication"

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

Welcome back!	
Add Two-Factor Authentication ()	<b>₽</b> SendGrid
Select Method Configure Confirm	Welcome back!
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.	Add Two-Factor Authentication: SMS (1)
<ul> <li>Text Messages (SMS)</li> <li>Recieve a confirmation code via text message on your mobile phone upon login.</li> <li>Relies on a phone number.</li> </ul>	Enter your mobile number We will use this number to send you a text message with a confirmation code. Country Code USA (+1)
You will not be able to log in when cellular service is     unavailable.	Mobile Phone Number
Log Out Next	Back Next
Select Text Message (SMS)	Add your Mobile Phone Number

4. You'll receive a text message (SMS) to that number containing a code which you can enter on the screen when prompted.

SendGrid	
Welcome back!	
Add Two-Factor Authentication	: SMS (1)
Select Method Configure Confirm	
Enter your code We just sent a 7-digit code to	
Authentication code	
	Back Save
Input your Authenti	cation code

5. You'll then be prompted to Log In to SendGrid one more time using the username and password provided in the first email from CanadaHelps.

<b>Note</b> : going forward, you'll be required to use Two-Factor Authentication (entering the co	ode provided via
SMS) each time you login.	·

## Add Single Sender and Verify Email Address

Once you're logged into SendGrid, you can add your desired additional *From Email*, which will trigger a verification email to complete the email verification process.

1. From the SendGrid home page, navigate to Settings

mycharity -dms ~						Dismiss
-	6	÷	Reach more custo	mers with Twilio	SMS	
📿 Dashboard		7 5	96% of text messages are Sign up today and send up	read within 3 minutes. to 2,000 text message	s for free.	
🕞 Email API 🛛 👻	T		Try Twilio for free	Learn more abo	out Twilio SMS	
€) Marketing ~						
💥 Design Library	Hello	mycharity!	Here's your r	ecent emai	l activity.	Wk Mo
Stats ~						
C Activity	REQUESTS	DELIVERED	OPENED	CLICKED	BOUNCES	SPAM REPORTS
©_ Validation	11	100.00% 11	1681.82% 185	90.91% <sup>10</sup>	0.00%	0.00% 0
Suppressions ~	80					
[뉴라] Settings ~						
	60					
I I I I I I I I I I I I I I I I I I I		c	elect Settings			

### 2. Select Sender Authentication

Design Library		Hello	mycharity!	Here's your i	recent ema	il activity.	w	k Mo
<u>iii</u> Stats ~								
C Activity		REQUESTS	DELIVERED	OPENED	CLICKED	BOUNCES	SPAM REPORTS	
$\odot$ Validation		11	100.00% 11	1681.82% 185	90.91% <sup>10</sup>	0.00%	0.00%	
Suppressions Y	80							$\land$
Settings ~								
Account Details	60							
Alert Settings								
API Keys	40					/		
Inbound Parse								
IP Addresses	20							
Mail Settings								
Sender Authentication	0							
SSO Settings NEW	22		23	24	25	26	27	28
Subuser Management								
Teammates	Impor	tant Next Step	s					Dismiss
Indukting	impor		-					_
	Select Sender Authentication							

3. On the next page, you'll notice your first verified DMS From Email. Select Verify a Single Sender to add a new from email

lauratest-dms ~	Sender Authentication		
🙆 Dashboard	Sender Identity The type of Sender Identity you use to send email can impact your deliv	erability and what your rec	ipients see in their inbox.
🕞 Email API 🛛 🗡	Learn more about the differences between Domain Authentication and S	Single Sender Verification.	
(3) Marketing ✓	Domain Authentication RECOMMENDED		
🔀 Design Library	Improve deliverability by proving to inbox providers that you own the domain you're sending from. Learn more		Authenticate Your Domain
🛗 Stats 👻		You (c	or a coworker) will need access to your <u>DNS host</u> to complete this.
C Activity			Get Starteu
◎ Validation	Circle Condex Verification		
Suppressions Y	Verify ownership of a single email address to use as a sender. Learn more	STATUS	DOMAIN
Settings ~	Verify a Single Sender	Verified	demp_sey@hotmail.com
Account Details			
Alert Settings			
	Select Verif	fy Single Send	er

4. On the next page, enter the details of the additional email you'd like to add to your DMS, and select Create

← <u>Return to your parent a</u>	ccount You are currently	You are required to include your contact information, including a physical
		mailing address, inside every promotional email you send in order to comply with the anti-spam laws such as CAN-SPAM and CASL, You'll find replacement
lauratest-dms v	Sender Authentication / Single Sender Verification ()	tags for this information in the footer of all the email designs SendGrid provides. Learn more From Name • Laura at TestCharity ①
🙆 Dashboard	SENDERS	From Email Address • leurad@canadahelps.org
ान् Email API Y	Laura Test FROM demp_sey@hotmail.com , REPLY demp_sey@hotmail.com	Reply To • laurad@canadahelps.org
€®) Marketing ~		Company Address • 555 Fake Street
🔀 Design Library		Company Address Line 2
iii Stats 🗸 🗸		City • Test City
Activity		Country • Zip Code Canada ~
Validation		Nickname • Laura at TestCharity
LO Suppressions		Cancel
Account Details		
	Enter your additi	ional email details

5. You'll see the below confirmation page and a notice that a verification email sent has been sent to the new address:

← <u>Return to your parent a</u>	<u>ccount</u> You	are currently					
		ur guides for E	-				
lauratest-dms ×	Sender Authentication / Single Sender Verification ()						
Dashboard	SENDERS	ADDRESS					
🕞 Email API 🛛 👻	Laura Test FROV demp_sey@hotmail.com REPLV demp_sey@hotmail.com	, CA	Sender has been created To verify sender identity, check your inbox				
ج)) Marketing ن	Laura at TestCharity 660M [burad@canadahelps.org REPLY [burad@canadahelps.org	555 Fake S Test City, C	at Burdle-Landbhreipsong.				
<u>금급</u> Stats ~							
C Activity							
@ Validation							
Suppressions *							
	Sender created success page						

6. In the verification email sent to your new address, select Verify Single Sender



7. You'll then be directed back to SendGrid, where you'll see a message confirming that the sender identity for the new email address has been successfully verified.

	Serrings	l	This message confirms the email verification is complete
+11	Settings	~	
5	Suppressions	÷	
<b>@</b>	Validation		
R	Activity		
ai	Stats	~	
28	Design Library		Teterrito single Seriola Vernication
<i>Ę</i> 9)	Marketing	v	Congratulations! Your sender identity has been successfully verified.
-	Email API	×	Sender Verified
	Dashboard		Alter .
2	Test Account	×	

### Add Your Newly Verified Email Address in the DMS

The final step in activating your secondary From Email Address is to add this newly-verified email address into your DMS.

1. Login to your DMS and head to your administrative Settings

2. Under DMS Mail, select From Email Addresses

Avence Dashudaru Contacts Contributions Campagits	Opportunities Reports DMS Mail	DMSCA DMSCA
lminister CanadaHelps DMS		
Customize Data and Screens		
Nebsite Forms	Contact Types	
Activity Types	Tags (Categories)	
Communications		
Organization Address and Contact Info	Print Page (PDF) Formats	
Message Templates		
Localization		
Date Formats		
System Settings		
Payment Processor Settings	Import/Export Mappings	
Misc (Undelete, PDFs, Limits, Logging, etc.)	Receipt Settings	
CanadaHelps Contribute		
Manage Campaigns	GLAccounts	
Funds	Manage Groups	
CanadaHelps Campaign Group		
Campaign Groups		
DMS Mail		
leaders, Footers, and Automated Messages	DMS Templates	
From Email Addresses	Draft, Schedule, and Manage DMS Mails	
Mailchimp Settings		

3. On the next page, you'll see your main DMS From Email that has been configured for you. **Do not modify the** existing From Email.

Welliness Avenue Dashboard Contacts Contrib	utions Ca	ampaigns Opportunities	Reports	DMS Mail					C	Settings   Help
From Email Address Options										
Vou can use this page to define one or more general Email Addresses that can	be selected as	s the From Address. EXAMPLE: "C	lient Services"	< <i>chentservices@e</i>	xample.org>					
Label	Value	Description		Order	Default	Reserved	Enabled?			
"Welness Ave," <welnessave@canadahelps.ca></welnessave@canadahelps.ca>	1	Default domain email address	and from nam	e. tu	~	No	Yes	Edit	Disable	Delete
Please don't modify your default From email address										

### 4. Instead, select Add From Email Address

	1	Default domain email address and from name	1.1	~	No	Yes		
Label	Value	Description	Order	Default	Reserved	Enabled?		
You can use this page to define one or more general Email Addresses that can l	e selected	as the From Address. EXAMPLE: "Client Services" «clien	tservices@exar	nple.org>				
From Email Address Options								
Wellness Avenue Dashboard Contacts Contribu	tions	Campaigns Opportunities Reports DMS	5 Mail				I	Settings   Help

5. Under FROM Email Address, add your desired additional From Name & Email Address with the following format:

"New Name" < info@charityname.ca>

New From Email	Address Option
FROM Email Address	a 'Al from Wellness Ave" <wellnessave@canadahelps.ca></wellnessave@canadahelps.ca>
	Include double-quotes (") around the name and angle-brackets (< >) around the email address. EXAMPLE: "Client Services" <clientservices@example.org></clientservices@example.org>
Value*	2
	O Source   X □ (a) (b) (b) (c) (c) (c) (c) (c) (c) (c) (c) (c) (c
	$\begin{array}{c c c c c c c c c c c c c c c c c c c $
Description	
Order*	2 🗘
Enabled?	
Default Option?	
	Format your new From Email name and existing address

- a: Your additional desired from name. The name must be within quotation marks
- b: Your additional desired from email. The address must be within < and >

6. Leave all the other fields intact and once you're done, select *Save* at the bottom right.

### Need a little more support? Don't worry!

Your Onboarding Expert will make sure everything is set up for success during your Configuration call.

Or, if you've completed your DMS Onboarding, contact our Support Team at info@canadahelps.org.

What's Next?

You'll now have multiple email addresses to choose from when when communicating with your donors through the DMS. Try it out by sending them a Single Email or Bulk Email!