

How to send a donation acknowledgment

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Thanking donors promptly and accurately is an important part of good stewardship.

Typical steps

1. Open the donation record.
2. Look for an **Acknowledgment, Thank You, Send Receipt**, or similar option.
3. Choose the appropriate email template or letter template.
4. Review the content (especially merge fields such as name, amount, and date).
5. Send the email or download/print the letter for mailing.

Automation

Many organizations configure HelpOne so that new donations are automatically flagged for acknowledgment. Check with your administrator for your organization's standard process and templates.

Tip: Keep a consistent tone and include any legally required language (for example, tax-deductible statements) in your templates.
