

Configuring Fundraising Settings

Learn how to navigate to the fundraising module within the Muse Software portal. This guide walks you through updating essential settings.

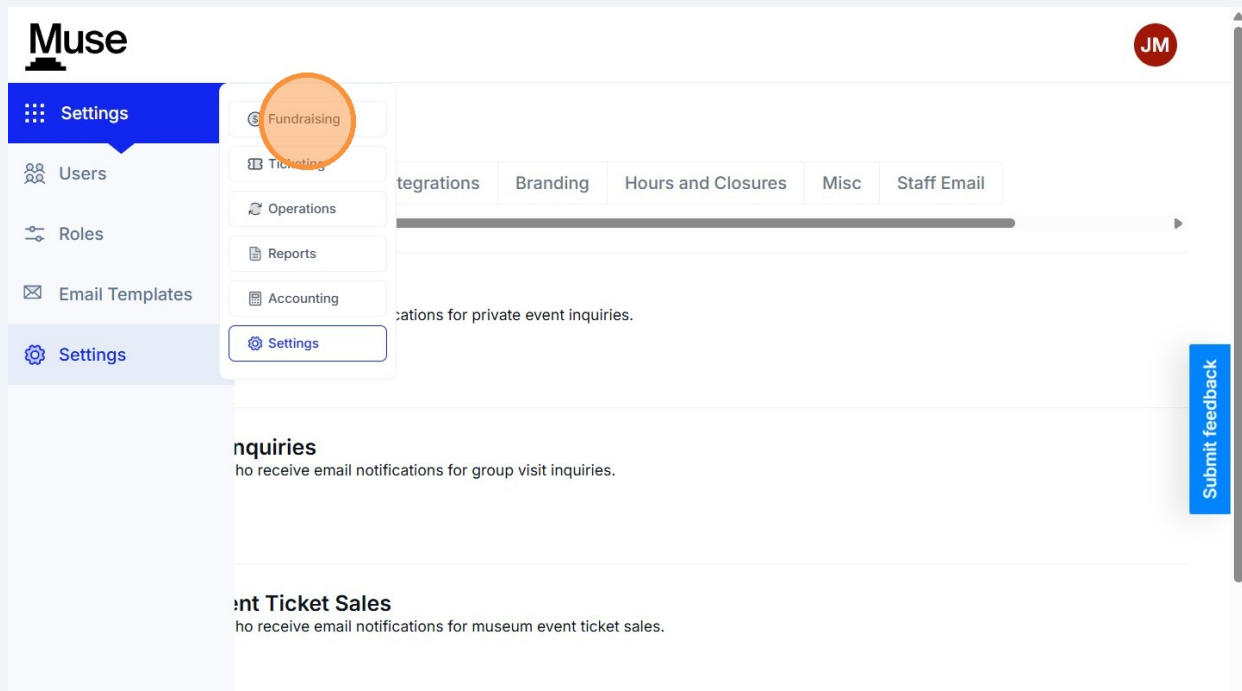
1 Click the blue North Star icon.

The image displays two screenshots of the Muse Software portal interface, illustrating the steps to reach the fundraising settings.

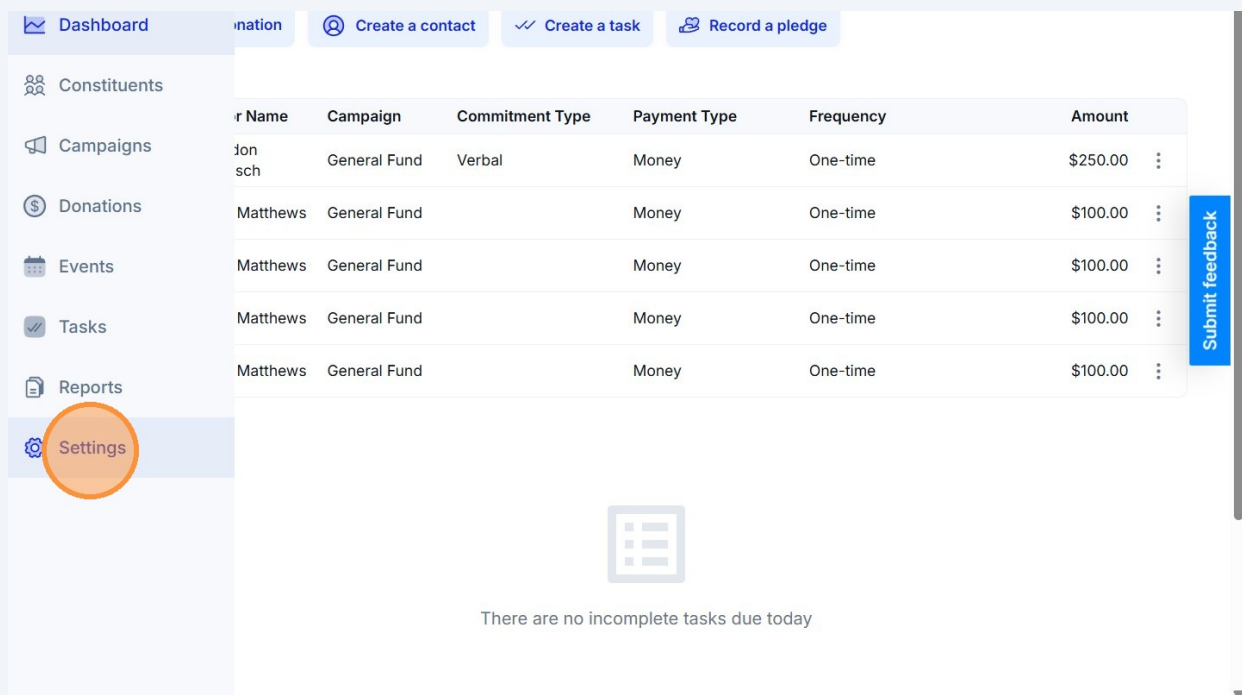
Top Screenshot: The main header shows the 'Muse' logo and a user profile icon labeled 'JM'. Below the header is a 'Settings' section with a horizontal menu containing 'Notifications', 'Donations', 'Integrations', 'Branding', 'Hours and Closures', 'Misc', and 'Staff Email'. The 'Settings' section is currently active, showing options for 'Private Event Inquiries', 'Group Visit Inquiries', and 'Museum Event Ticket Sales', each with a 'Manage' button. A 'Submit feedback' button is visible on the right side.

Bottom Screenshot: This screenshot shows the same interface, but with the 'Settings' menu item highlighted in blue. The 'Settings' menu is expanded, showing a list of options: 'Users', 'Roles', 'Email Templates', and 'Settings'. The 'Settings' option is selected, and the 'Settings' section is now active, displaying the same options as the top screenshot.

2 Click "Fundraising"



3 Open Fundraising Settings



Acknowledgement Letters

4

Donations made above the amount entered in the Global Threshold field are automatically added to a "Review Letter" queue so that you can handle acknowledgment manually for larger donations.

Muse Search for an individual or organization JM

Fundraising Settings

[Acknowledgement Letters](#) [Tags](#)

Acknowledgement Letter Threshold

Global Threshold

\$250.00 ✓

Template Management

No-Consideration Template ⓘ

Dear *CONSTITUENTTITLE* *CONSTITUENTFIRSTNAME* *CONSTITUENTLASTNAME*,

Thank you for your generous contribution of *AMOUNT* made to the The Muse Collective on *DATEOFCONTRIBUTION*. Your support plays a vital role in the success of our educational programs, exhibition and preservation efforts. We are incredibly grateful for your generosity and commitment to our mission.

As required for tax purposes, please note that no goods or services were provided in exchange for your contribution.

Please retain this letter for your records. Should you have any questions or need additional documentation, feel free to contact

[Submit feedback](#)

5

Donations made below the amount entered in Global Threshold field will receive an automatic acknowledgement letter, configured in the following No-Consideration Template field.

Muse Search for an individual or organization JM

Fundraising Settings

[Acknowledgement Letters](#) [Tags](#)

Acknowledgement Letter Threshold

Global Threshold

\$250.00 ✓

Template Management

No-Consideration Template ⓘ

Dear *CONSTITUENTTITLE* *CONSTITUENTFIRSTNAME* *CONSTITUENTLASTNAME*,

Thank you for your generous contribution of *AMOUNT* made to the The Muse Collective on *DATEOFCONTRIBUTION*. Your support plays a vital role in the success of our educational programs, exhibition and preservation efforts. We are incredibly grateful for your generosity and commitment to our mission.

As required for tax purposes, please note that no goods or services were provided in exchange for your contribution.

Please retain this letter for your records. Should you have any questions or need additional documentation, feel free to contact us.

With sincere appreciation,

[Save changes](#)

In-Kind Template ⓘ

Dear *CONSTITUENTTITLE* *CONSTITUENTFIRSTNAME* *CONSTITUENTLASTNAME*,

Thank you for your generous contribution of the following on *DATEOFCONTRIBUTION*:

DESCRIPTION

Your support plays a vital role in the success of our educational programs, exhibition and preservation efforts. We are incredibly

[Submit feedback](#)

6

The In-Kind template is to be used if a donation is indicated to have been made "in-kind".

In-Kind Template

Dear *CONSTITUENTTITLE* *CONSTITUENTFIRSTNAME* *CONSTITUENTLASTNAME*,

Thank you for your generous contribution of the following on *DATEOFCONTRIBUTION*:

DESCRIPTION

Your support plays a vital role in the success of our educational programs, exhibition and preservation efforts. We are incredibly grateful for your generosity and commitment to our mission.

As required for tax purposes, please note that no goods or services were provided in exchange for your contribution.

Please retain this letter for your records. Should you have any questions or need additional documentation, feel free to contact us.

With sincere appreciation,

Save changes

FMV Template

Dear *CONSTITUENTTITLE* *CONSTITUENTFIRSTNAME* *CONSTITUENTLASTNAME*,

Thank you for your generous contribution of *AMOUNT* made to the The Muse Collective on *DATEOFCONTRIBUTION*. Your support plays a vital role in the success of our educational programs, exhibition and preservation efforts. We are incredibly grateful for your generosity and commitment to our mission.

Save changes

Submit feedback

7

The FMV Template is to be used for donations where something with a fair market value (e.g., tickets) are given to the donor in return.

FMV Template

Dear *CONSTITUENTTITLE* *CONSTITUENTFIRSTNAME* *CONSTITUENTLASTNAME*,

Thank you for your generous contribution of *AMOUNT* made to the The Muse Collective on *DATEOFCONTRIBUTION*. Your support plays a vital role in the success of our educational programs, exhibition and preservation efforts. We are incredibly grateful for your generosity and commitment to our mission.

As required for tax purposes, please note that the following goods or services were provided in exchange for your contribution:

- Admission Tickets, if used, are valued at \$FMV per ticket.

Please retain this letter for your records. Should you have any questions or need additional documentation, feel free to contact us.

With sincere appreciation,

Save changes

General Settings

Email Subject Default

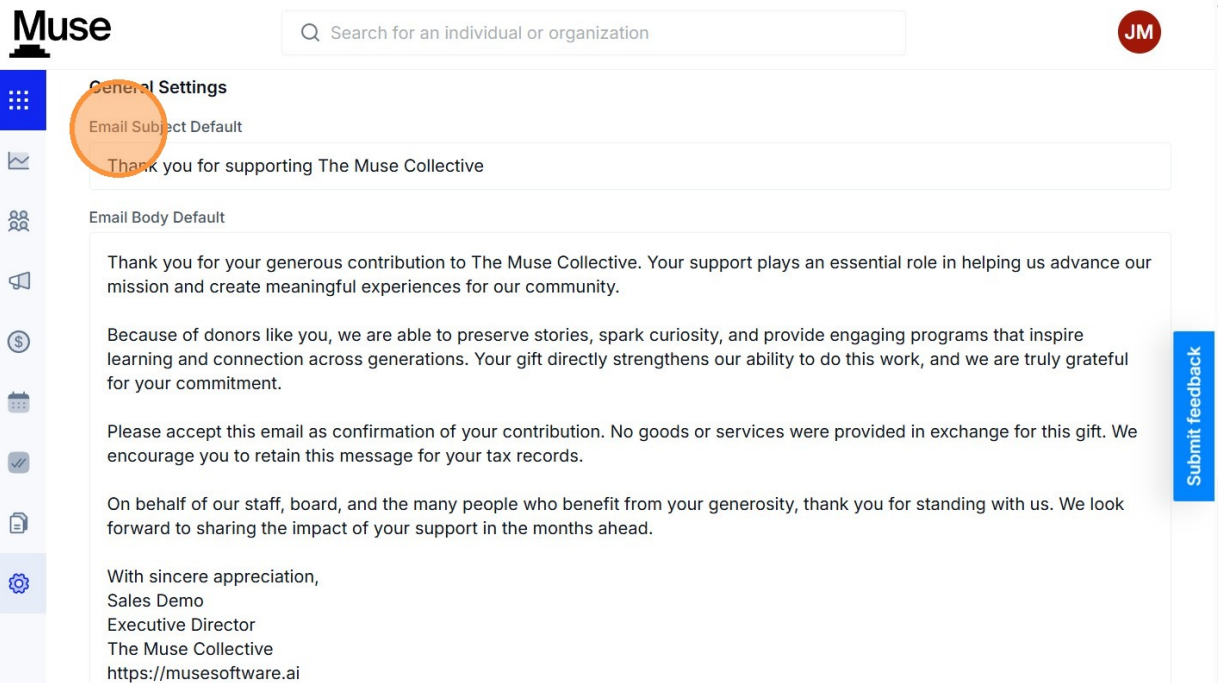
Thank you for supporting The Muse Collective

Save changes

Submit feedback

8

The Email Subject Default line will appear for all of the above email templates when sent.



Muse JM

General Settings

Email Subject Default

Thank you for supporting The Muse Collective

Email Body Default

Thank you for your generous contribution to The Muse Collective. Your support plays an essential role in helping us advance our mission and create meaningful experiences for our community.

Because of donors like you, we are able to preserve stories, spark curiosity, and provide engaging programs that inspire learning and connection across generations. Your gift directly strengthens our ability to do this work, and we are truly grateful for your commitment.

Please accept this email as confirmation of your contribution. No goods or services were provided in exchange for this gift. We encourage you to retain this message for your tax records.

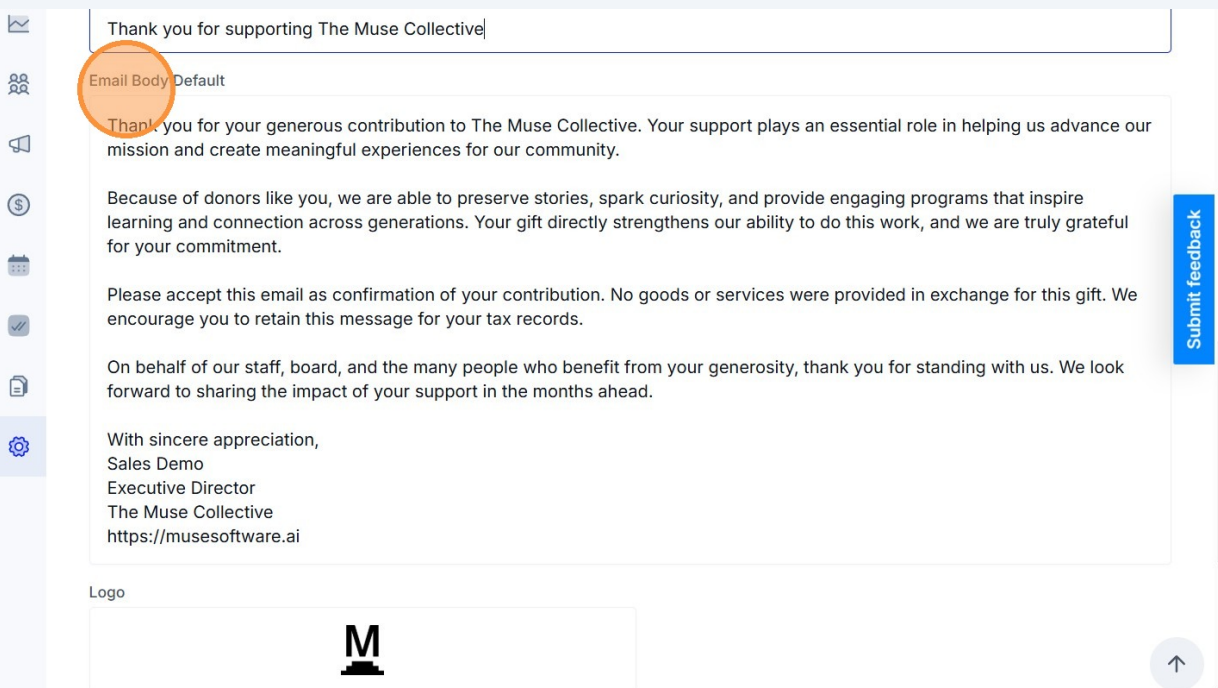
On behalf of our staff, board, and the many people who benefit from your generosity, thank you for standing with us. We look forward to sharing the impact of your support in the months ahead.

With sincere appreciation,
Sales Demo
Executive Director
The Muse Collective
<https://musesoftware.ai>

[Submit feedback](#)

9

The Email Body Default will appear for all of the above email templates, unless you update copy in the Email Body for the individual template types to vary the messaging.



Muse JM

General Settings

Email Subject Default

Thank you for supporting The Muse Collective

Email Body Default

Thank you for your generous contribution to The Muse Collective. Your support plays an essential role in helping us advance our mission and create meaningful experiences for our community.

Because of donors like you, we are able to preserve stories, spark curiosity, and provide engaging programs that inspire learning and connection across generations. Your gift directly strengthens our ability to do this work, and we are truly grateful for your commitment.

Please accept this email as confirmation of your contribution. No goods or services were provided in exchange for this gift. We encourage you to retain this message for your tax records.

On behalf of our staff, board, and the many people who benefit from your generosity, thank you for standing with us. We look forward to sharing the impact of your support in the months ahead.

With sincere appreciation,
Sales Demo
Executive Director
The Muse Collective
<https://musesoftware.ai>

Logo



[Submit feedback](#)

10

Click the Logo upload area to save your logo, which will appear on all acknowledgement letter types.

Muse Search for an individual or organization JM

On behalf of our staff, board, and the many people who benefit from your generosity, thank you for standing with us. We look forward to sharing the impact of your support in the months ahead.

With sincere appreciation,
Sales Demo
Executive Director
The Muse Collective
<https://musesoftware.ai>

Logo

Signature (240 × 60px)

Name and Title of Signer

Sales Demo, Executive Director

Footnote

In accordance with IRS regulations, we confirm that no goods or services were provided in exchange for this contribution. This

[Submit feedback](#)

11

Click the Signature upload area to upload a signature of the signer of all acknowledgement letter types. The signature image size is 240 x 60PX.

On behalf of our staff, board, and the many people who benefit from your generosity, thank you for standing with us. We look forward to sharing the impact of your support in the months ahead.

With sincere appreciation,
Sales Demo
Executive Director
The Muse Collective
<https://musesoftware.ai>

Logo

Signature (240 × 60px)

Name and Title of Signer

Sales Demo, Executive Director

Footnote

In accordance with IRS regulations, we confirm that no goods or services were provided in exchange for this contribution. This acknowledgment may be used for tax reporting purposes.

[Save changes](#) [Submit feedback](#)

12

The Name and Title of Signer is the printed name of the signature that will appear at the bottom of all of the above email templates.

You also have the option to enclose a footnote on all of the above email templates.

From: Sales Demo
Sales Demo
Executive Director
The Muse Collective
<https://musesoftware.ai>

Logo

Signature (240 x 60px)

Name and Title of Signer
Sales Demo, Executive Director

Footnote
In accordance with IRS regulations, we confirm that no goods or services were provided in exchange for this contribution. This acknowledgment may be used for tax reporting purposes.

Submit feedback

Save changes

13 Click "Save changes" when finished.

The screenshot shows the Muse software interface. On the left is a sidebar with icons for email, people, announcement, currency, calendar, checkmark, and document. The main content area has a header with 'Sales Demo', 'Executive Director', 'The Muse Collective', and 'https://musesoftware.ai'. Below this is a 'Logo' field containing a large 'M'. Then a 'Signature (240 x 60px)' field with a signature. Below that is a 'Name and Title of Signer' field with 'Sales Demo, Executive Director'. At the bottom is a 'Footnote' field with the text: 'In accordance with IRS regulations, we confirm that no goods or services were provided in exchange for this contribution. This acknowledgment may be used for tax reporting purposes.' On the right side, there is a vertical 'Submit feedback' button. At the bottom right, the 'Save changes' button is highlighted with an orange circle, and a small upward arrow icon is next to it.

Tags

14 To create your list of constituent tags, click "Tags"

The screenshot shows the Muse software interface. At the top left is the 'Muse' logo. To its right is a search bar with the placeholder text 'Search for an individual or organization'. On the far right is a red circle with the initials 'JM'. Below the search bar is a sidebar with icons for email, people, announcement, currency, calendar, checkmark, and document. The main content area has a header with 'Fundraising Settings'. Below this is a 'Tags' button highlighted with an orange circle. Below the 'Tags' button is a section titled 'Acknowledgement Letter Threshold' with a 'Global Threshold' field containing '\$250.00' and a blue checkmark icon. Below that is a 'Template Management' section with a 'No-Consideration Template' field containing the text: 'Dear *CONSTITUENTTITLE* *CONSTITUENTFIRSTNAME* *CONSTITUENTLASTNAME*,
Thank you for your generous contribution of *AMOUNT* made to the The Muse Collective on *DATEOFCONTRIBUTION*. Your support plays a vital role in the success of our educational programs, exhibition and preservation efforts. We are incredibly grateful for your generosity and commitment to our mission.
As required for tax purposes, please note that no goods or services were provided in exchange for your contribution.
Please retain this letter for your records. Should you have any questions or need additional documentation, feel free to contact

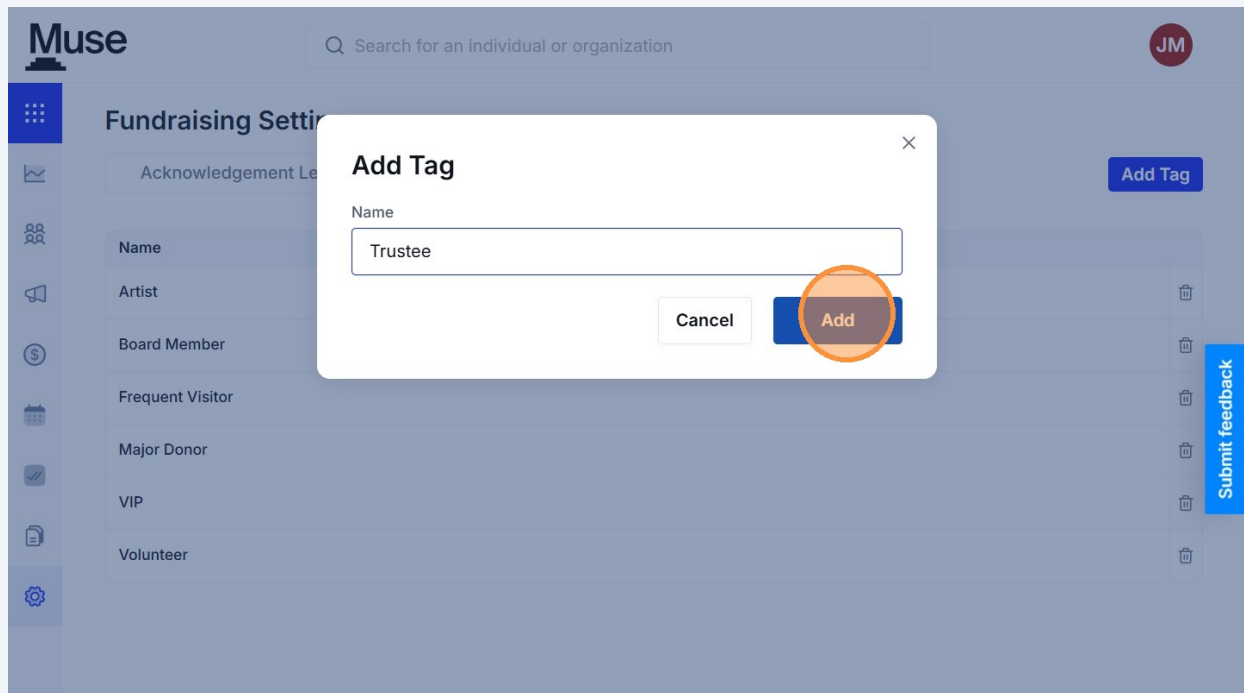
15 Click "Add Tag"

The screenshot shows the 'Muse' interface. At the top, there's a search bar with the placeholder text 'Search for an individual or organization'. Below the search bar, the 'Fundraising Settings' section is active, with a sub-tab 'Tags' selected. To the right of the 'Tags' tab is an orange circular button labeled 'Add Tag'. Below the tabs is a table with the following rows: 'Name', 'Artist', 'Board Member', 'Frequent Visitor', 'Major Donor', 'VIP', and 'Volunteer'. Each row has a trash icon on the right. A blue vertical button labeled 'Submit feedback' is on the far right. The left sidebar contains various icons for navigation.

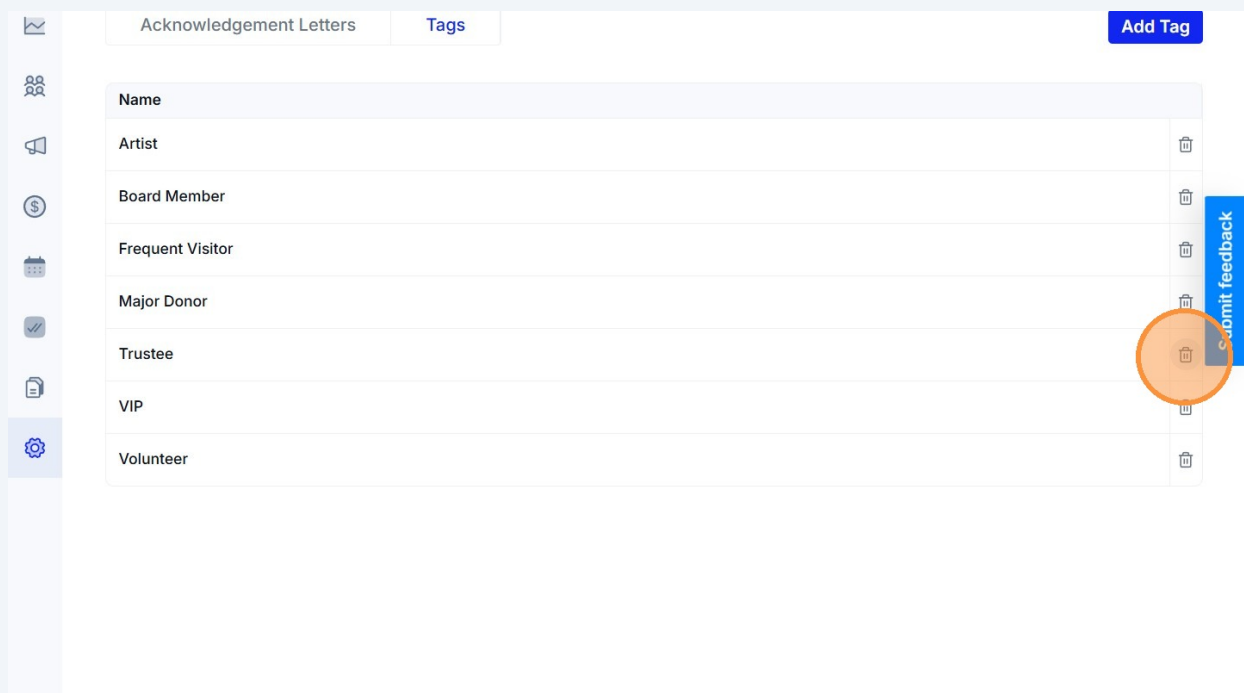
Name	
Artist	
Board Member	
Frequent Visitor	
Major Donor	
VIP	
Volunteer	

16 From here, you can build your list of constituent tags. Common tags include Artist, Board Member, Frequent Visitor, VIP, and Volunteer, among many other creative ways to segment your constituents.

- 17 Click "Add" to build out your list of tags.



- 18 To remove a tag from the list, click the trash can icon to the right of the listed tag.



19

You'll be asked to confirm the deletion as doing so cannot be undone and removes the tag from any constituent where it was already applied. Click "Delete" to confirm.

