

Watch All Training Webinars

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Donor Management System

Watch our webinars on everything related to our Donor Management System, including a General Overview, the ins and outs of Tax Receipting, and all about Communicating with your Contacts!

Table of Contents:

- [Getting Started](#)
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Getting Started

This session is an overview of the main tabs in the DMS, as well as its most common functionalities.

Experience: *Beginner*

Duration: *35 minutes*

Pre-requisites: *None*

[▶ Watch Recording \(English\)](#)

Agenda:

1. [Introducing the CanadaHelps DMS](#)
2. [Dashboard](#)
3. [Contacts](#)
4. [Contributions](#)
5. [Campaigns](#)
6. [Opportunities](#)
7. [Reports](#)
8. [DMS Mail](#)
9. [Settings](#)

Tax Receipting

This session looks at configuring your DMS Tax Receipts, as well as common tax receipting scenarios, including issuing, re-issuing, and cancelling your tax receipts.

Experience: *Intermediate*

Duration: *25 minutes*

Pre-requisites: [Getting Started](#)

[▶ Watch Recording \(English\)](#)

Agenda:

1. Introduction to Tax Receipting in the DMS
2. Configuring your Tax Receipts
3. Modifying your Tax Receipt Thank-You Note
4. Modifying your Tax Receipt Email
5. Issuing a Single Tax Receipt
6. Issuing Multiple Tax Receipts
7. Issuing Yearly Tax Receipts
8. Re-Issuing a Tax Receipt
9. Voiding and Issuing a Corrected Tax Receipt
10. Marking a Contribution as Ineligible for Receipting

Communicating with your Donors

This session is all about communicating with your donors through the DMS. Specifically, learn how to thank your donors, send single or bulk emails, configure the DMS MailChimp integration, and create documents for your direct mail needs.

Experience: *Intermediate*

Duration: *30 minutes*

Pre-requisites: [Getting Started](#)

[▶ Watch Recording \(English\)](#)

Agenda:

1. The Importance of Donor Retention
2. Thanking Donors Through CanadaHelps.org
3. Thanking Donors: DMS Tax Receipt Thank-You Note
4. Thanking Donors: DMS Tax Receipt Thank-You Email
5. Thanking Donors: Creating Custom Templates
6. Sending a Single Email
7. Sending Bulk Emails (DMS Mail)
8. Creating Groups & Smart Groups
9. Email Performance Reports
10. DMS MailChimp Integration
11. Creating Letters and other Printed Documents
12. Printing Mailing Labels