Navigating the DMS

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Donor Management System

Logging into any system for the first time can be a little overwhelming. But don't worry! We're here to help you easily navigate your new DMS.

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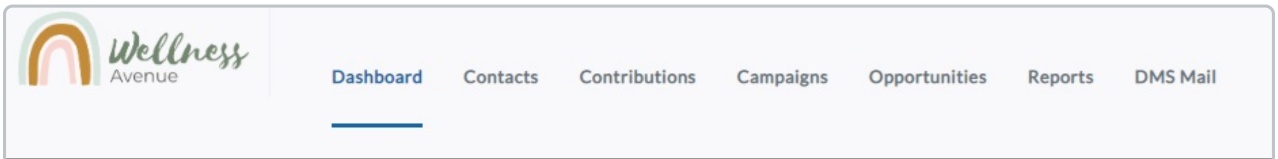
Prefer to watch a **guided walk-through** of the DMS? Check out our **Getting Started webinar**!

Main Menu and Dashboard Tab

When you login, you'll land on the ***Dashboard*** tab, where you'll see the Main Menu / Navigation Bar. The Main Menu is accessible from any page. Just click on one of the available tabs of the Main Menu to navigate to any section of the DMS.

—> Learn More about your Dashboard & Dashlets



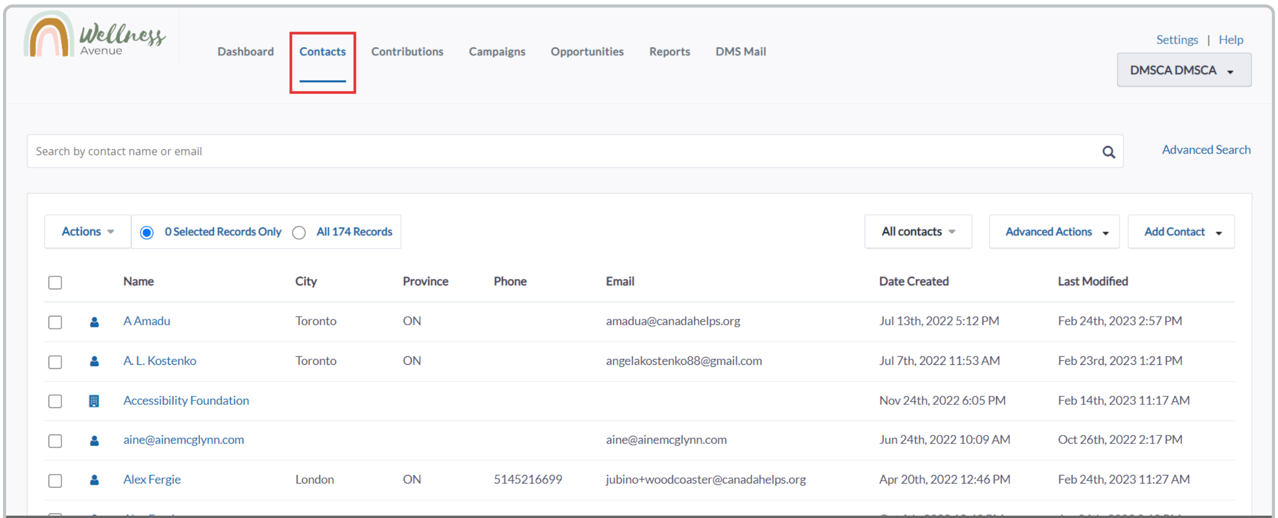
Main Menu

Contacts Tab

Clicking on ***Contacts*** in the Main Menu will take you to the main screen of the Contacts Tab where you'll see a list of every contact record in your DMS, as well as some basic information about each Contact.

To access a contact record, just click on the name of a Contact. You can also add a Contact from this Tab by selecting ***Add Contact*** in the top right-hand corner.

—> Learn More about Contacts



Contacts Tab

Contacts Tab Columns

- ***Name***: Contact's last, first names
- ***City***
- ***Province***
- ***Phone***: Contact's main phone number
- ***Date Created***: the date the Contact was created
- ***Last Modified***: the date the Contact record was last modified

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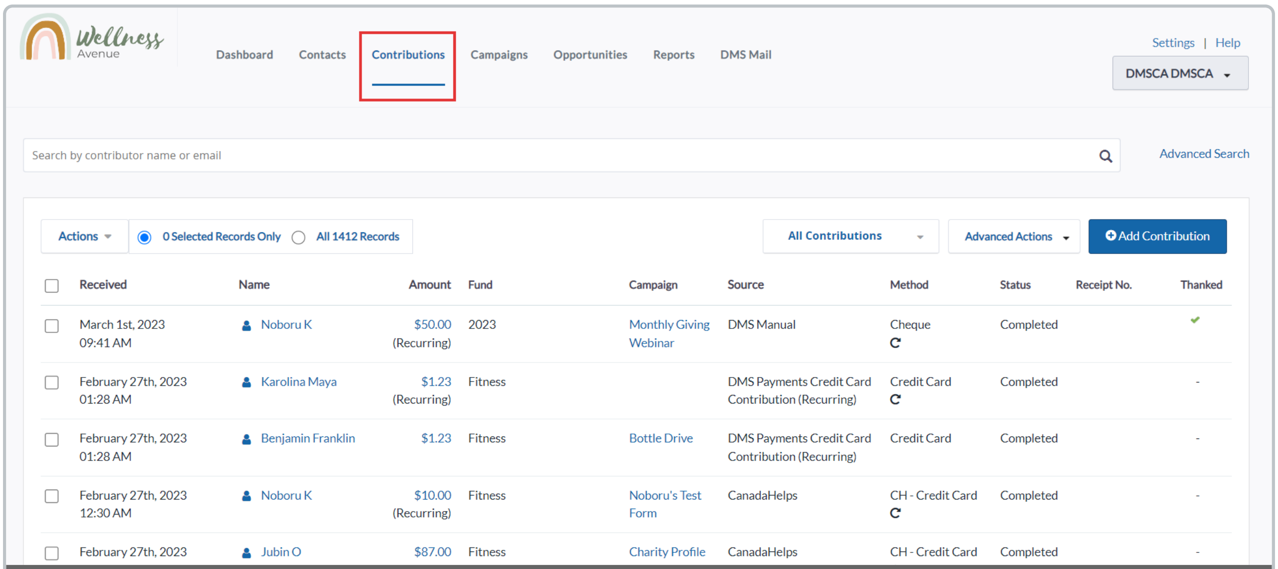
Contributions Tab

Clicking on ***Contributions*** in the Main Menu, will take you to the main screen of the Contributions Tab where you'll see a list of every Contribution in the DMS, in order of most recent (by Contribution Date).

Each time a new Contribution is made (either through CanadaHelps or added by you manually in the DMS), it'll appear at the top of this list. You can also add a Contribution from this Tab by selecting ***Add Contribution*** in the top right-hand corner.

—> Learn More about Contributions



Contributions Tab

Contributions Tab Columns

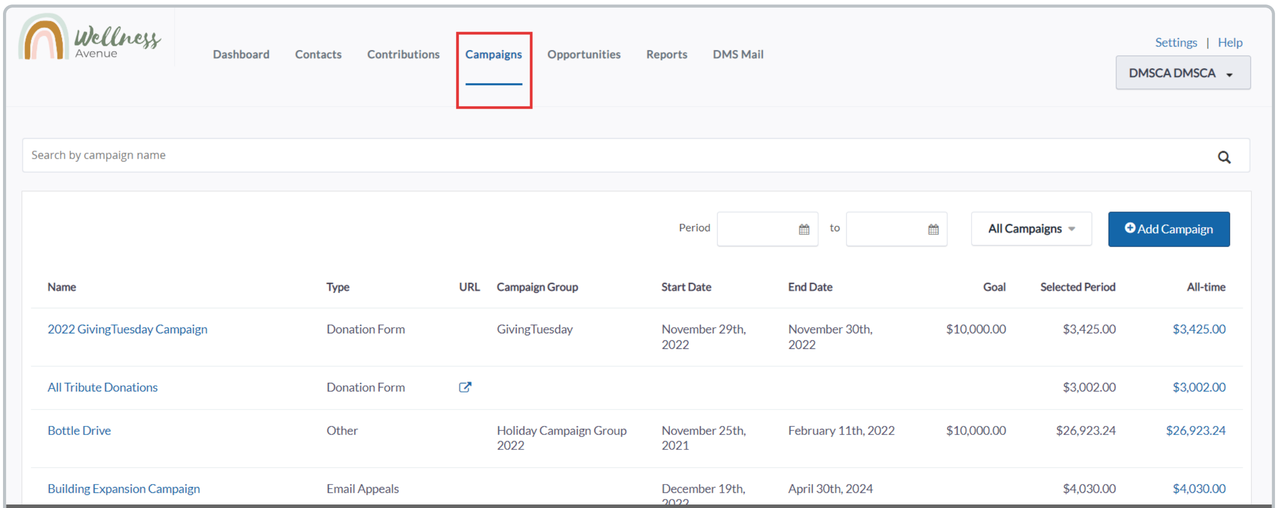
- ***Reference***: access an individual Contribution by selecting *View* or the Reference Number under the same column.
- ***Name***: Contact's last, first names
- ***Date***: the date the Contribution was made
- ***Amount***: the Contribution's dollar amount
- ***Method***: the original payment method of the Contribution
- ***Fund***: the DMS Fund the Contribution is associated with
- ***Source***: the source associated with that Contribution when it was originally imported into the DMS (e.g. Historical Data Import)
- ***Thanked***: if the Contact has been thanked for that Contribution (represented by a checkmark).

Campaigns Tab

Clicking on ***Campaigns*** in the Main Menu will take you to the Campaigns tab where you'll see information about your online and offline fundraising campaigns.

Here, you'll be able to track any campaign you're running through CanadaHelps. You can also track offline campaigns (e.g., a direct mail campaign) by selecting ***Add Campaign*** in the top right corner.

—> Learn More about Campaigns



Campaigns Tab

Campaigns Tab Columns

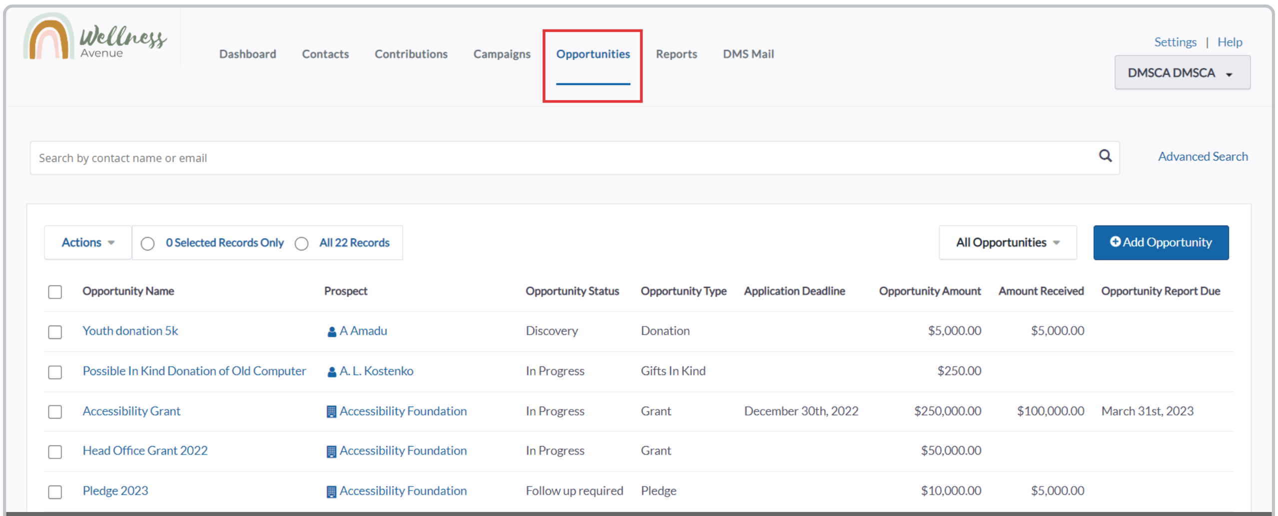
- **Name**
- **Type**
- **Campaign Group**
- **Start Date of the Campaign**
- **End Date of the Campaign**
- **Goal**: The monetary goal of the Campaign
- **Selected Period**: The total raised in the selected period (applicable when filtered)
- **All-Time:** The all-time revenue raised by that Campaign.

Opportunities Tab

Clicking on ***Opportunities*** in the Main Menu will take you to the Opportunities Tab, which can serve as a management resource for your organization. You can use it to record and track the status of medium to long-term requests like grant applications, major gifts, and special projects.

Each Opportunity is associated with both a Contact in the DMS (the Contact you're approaching for the Opportunity) as well as a DMS User (the individual at your organization looking after the Opportunity). You can also add an Opportunity from this tab by clicking on ***Add Opportunities*** in the top right corner.

—> Learn More about Opportunities



Opportunities Tab

Opportunities Tab Columns

- **Name**: the name of the Contact you are approaching for the Opportunity
- **Opportunity Name:** the name of the grant or project
- **Type**
- **Status**
- **Requested**: the amount of funds requested
- **Received**: the amount of funds received
- **Decision date:** the date the final decision about the Opportunity will be made
- **Owner**: the DMS user managing/overseeing the Opportunity

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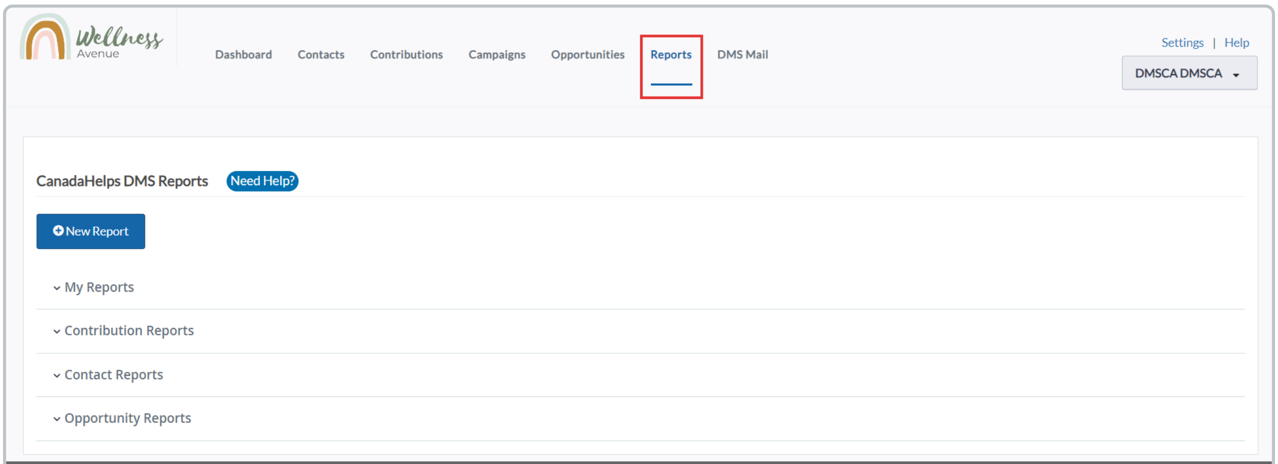
Reports Tab

Clicking on ***Reports*** in the Main Menu will take you to the main screen of the Reports Tab, where you'll see a list of dozens of preset DMS reports. These reports showcase various metrics for your Contacts, Contributions and Campaigns.

To access a Report, just click on the name of the Report or ***View Results***. Though the list of Reports is set, you can filter each Report by multiple criteria. You can also access even more specialized reports by clicking on ***New Report***.

—> Learn More about Reports



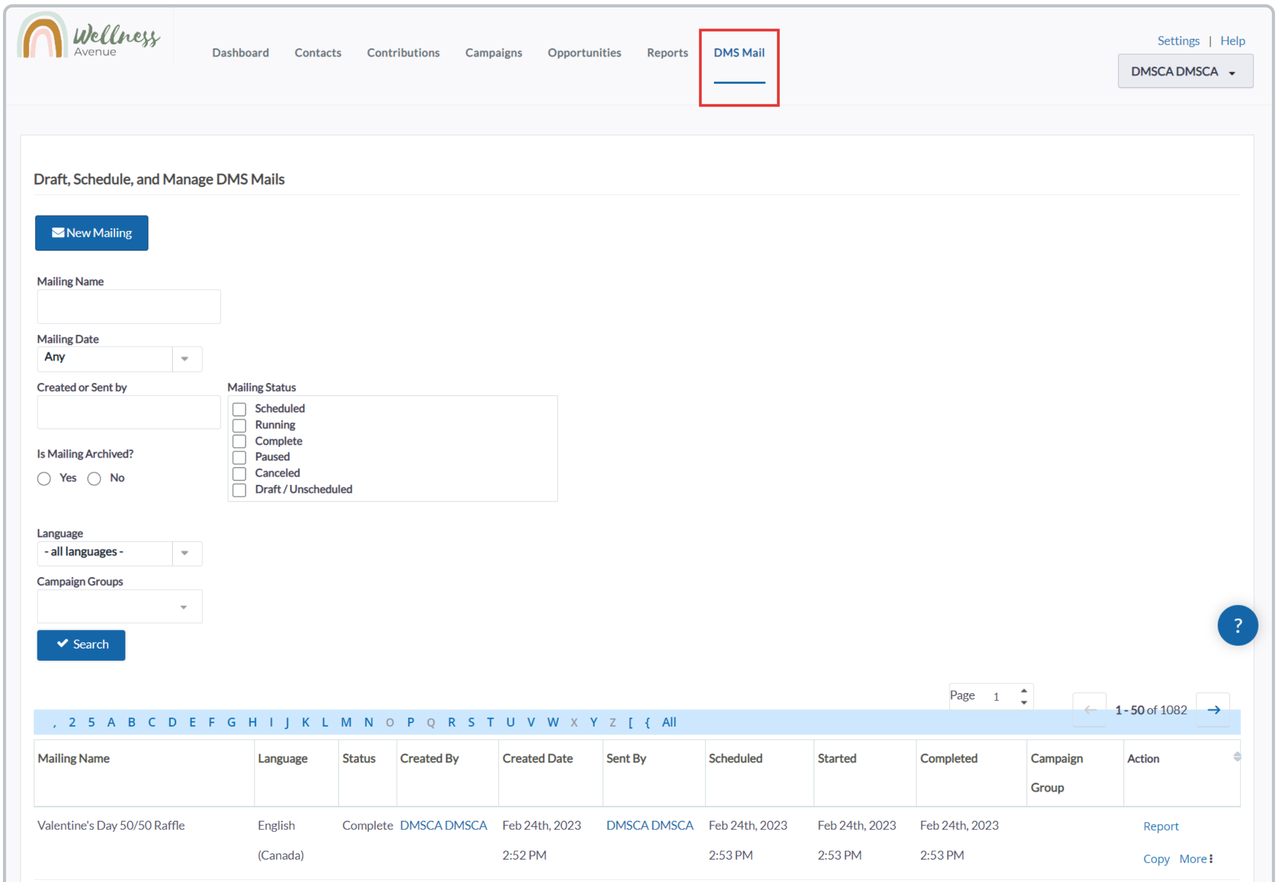
Reports Tab

DMS Mail Tab

Clicking on the DMS Mail tab in the Main Menu will allow you to access the ***DMS Mail feature*** (also known as the Bulk email tool). This tool will allow you to create, send, and manage beautifully-branded, personalized mass-email communications such as fundraising appeals, e-newsletters, charity announcements and much more.

To create a new bulk email, just click on the ***New Mailing*** button. Towards the bottom of your screen, you'll see a list of any previously sent, or future-scheduled, DMS mailings.

—> **Learn More about DMS Mail**



DMS Mail Tab

DMS Mail Tab Columns

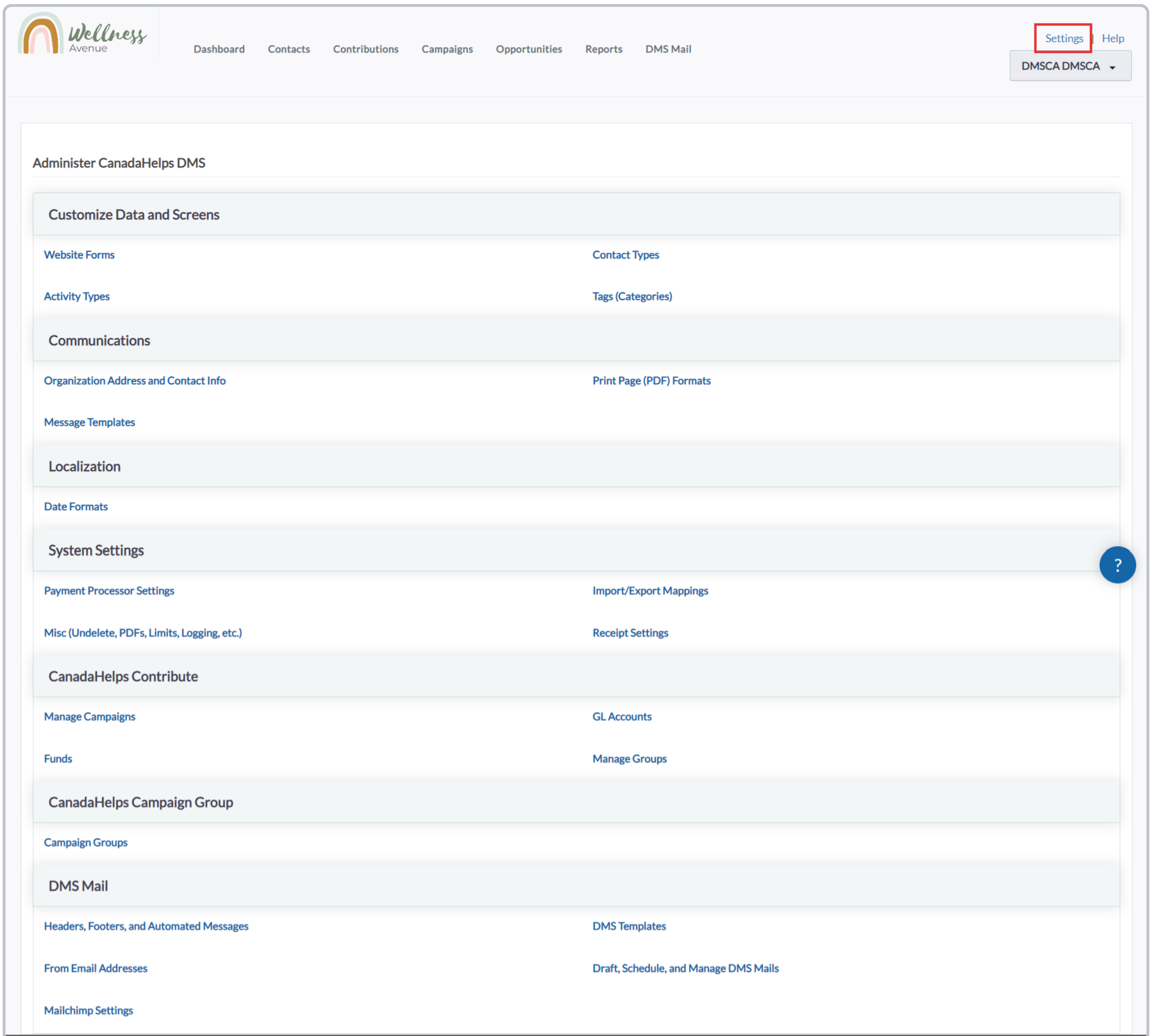
- **Mailing Name**: the internal (not public-facing) name that you've assigned to your mailing
- **Language:** the language selected for your mailing (English/French)
- **Status:** Whether the mailing has been sent or is still pending delivery (if scheduled for a future date)
- **Created By:** the date and time the mailing was created
- **Created Date**: the amount of funds received
- **Sent By:** the DMS user who ultimately sent the mailing (may differ from the user who created it)
- **Scheduled:** the date and time the mailing is scheduled to send (if applicable)
- **Started:** the date and time the mailing's delivery was initiated
- **Completed:** the date and time the mailing's delivery finished
- **Campaign Group**
- **Action:** where you can access email performance reports, copy (clone) a mailing, and perform other actions on it (delete, archive, view, pause scheduled delivery)

Administrative Settings

When you're on any one of the main DMS tabs, clicking on***Settings*** link in the top-right hand corner will take you to the administrative Settings, where you'll see a list of all Settings to administer your DMS.

It's broken down into a few different administrative Settings sections, each one representing an area of the DMS. To see the settings options in each Section, simply click on the arrow to the left of each Section description.

—> Learn More about Settings



Administrative Settings Sections

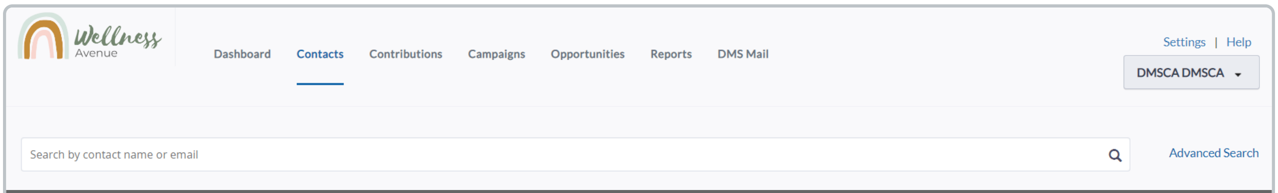
Administrative Settings Sections

- **Customize Data and Screens** (i.e. Activities and Tags)
- **Communications** (i.e. Single Emails and Thank You Templates)
- **Users and Permissions** (i.e., DMS Administrators)
- **System Settings** (i.e. Receipt Settings)
- **CanadaHelps Report** (i.e., Report templates and mapping)
- **CanadaHelps Contribute** (i.e. Campaigns and Funds)
- **CanadaHelps Campaign Group** (i.e., Campaigns)
- **DMS Mail** (i.e. Bulk Email tool)

Understanding Search, List Rows & Actions

The Contacts, Contributions, Campaigns and Opportunities tabs all have search bars that you can use to do a quick search on the content of these Tabs.

To search for a Contact in the Contacts or Contributions Tabs, enter the name or email address of the Contact in the search bar under the Main Menu. To search for Campaigns or Opportunities, simply use the search bar in the Campaigns or Opportunities tab to search by a Campaign Name or Opportunity Name.



Basic search bar

Tip: Enhance your search results by searching by: “First Name”; “Last Name”; partial “First Name”; partial “Last Name”; or “First Name Last Name”.

Example: Search “Jane” or “Doe” or “Jane Doe”

Rows

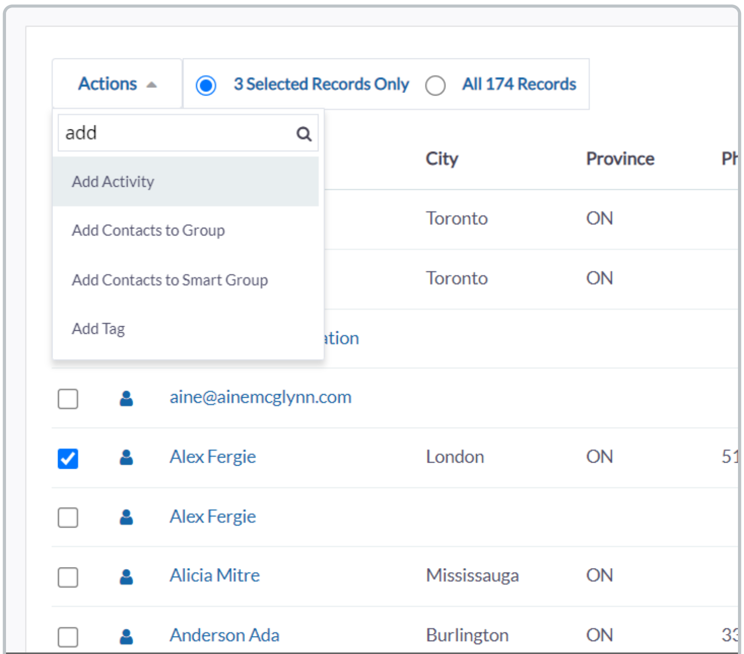
The number of rows displayed on the Contacts, Contributions, Campaigns and Opportunities Tabs is **defaulted to 50** but you can adjust the number of rows displayed by scrolling to the bottom of the page and using the up/down arrows on the box labelled *Rows.*

Example: Default number of rows displayed at once

To the right of the box labelled *Rows*, you'll see the number of pages of rows and the total number of Contacts/Contributions/Campaigns or Opportunities in your DMS. To navigate to the next page of information, just click the arrow pointing right; you can go back by clicking on the left arrow.

Actions

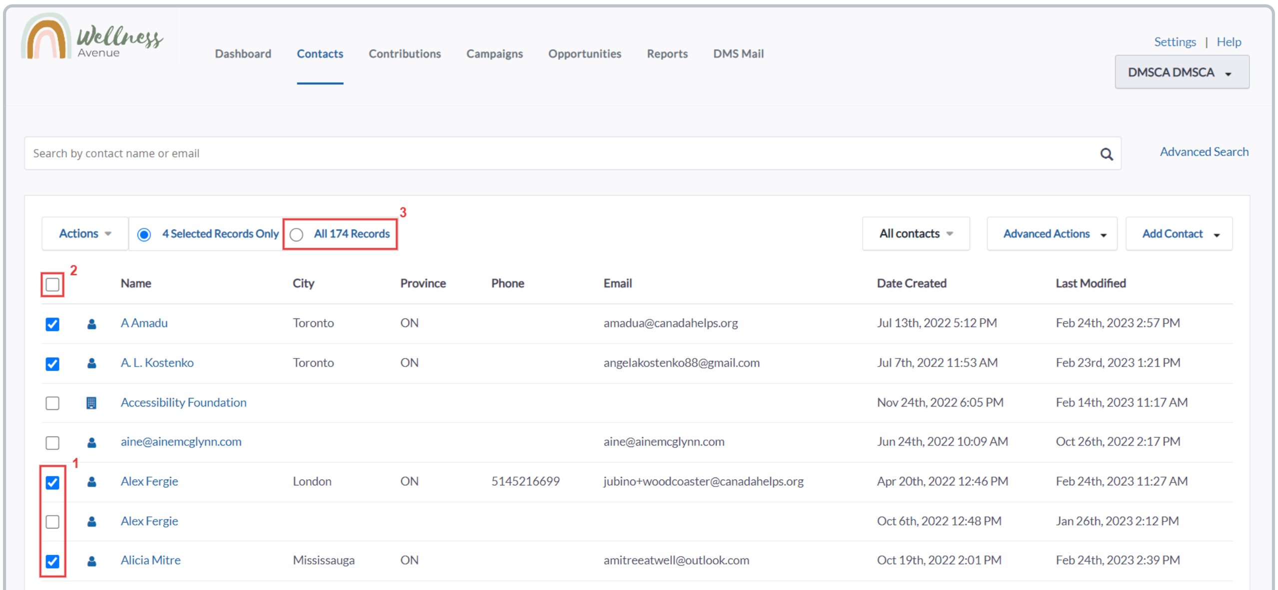
From the Contacts, Contributions, and Opportunities tabs, you can perform a variety of Actions to one or many Contacts, Contributions, or Opportunities.



Actions Example

In any of these Tabs, to see the list of available Actions, **select one or more Records** (Contacts, Contributions & Opportunities):

1. **Specific Records** on the page,
2. **Every listed Record** on the page, or
3. **All Records** in your DMS



Select records in 3 different ways

Once you've selected one or more Records, you can click on **the *Actions* box** on the top left side of the page, where you'll see a **dropdown list of actions** to apply to the selected Contacts, Contributions or Opportunities, such as "Say Thanks", "Issue a receipt", "Send DMS Mail" and more.

Understanding Merge Fields

Formerly known as DMS Tokens, Merge Fields can be used to automatically include information from multiple Contacts in Email Message Templates.

This way, you can send one single email to all of your Contacts, and each Contact will receive the information that is tailored to them.

Example Thank You Message:

Dear *{contact.first_name}*,

We want to thank you for your recent donation of *{contribution.total_amount}* on *{contribution.receive_date}*. With your generous support, we're better able to achieve our important charitable mission.

With gratitude,

CanadaHelps

Where can I use Merge Fields?

You can use Merge Fields in the DMS when:

- Sending a Single Email
- Thanking your Donor
- Sending Bulk Emails (DMS Mail)
- Printing & Merging Letters
- Adding & Managing a Message Template
- Modifying the Default Tax Receipt Emails

Merge Fields can be used on both the **Email Subject** and the **Email Body** (HTML and Text).

Note: Merge Fields are not available on the Email Subject when Thanking your Donor at this moment.

Available Contact Merge Fields

Name	Merge Field
Contact display name	{contact.display_name}
Contact Type	{contact.contact_type}
Recognition Name	{contact.nick_name}
First Name	{contact.first_name}
Middle Name	{contact.middle_name}

Name	Merge Field
Last Name	{contact.last_name}
Individual Prefix	{contact.prefix_id}
Individual Suffix	{contact.suffix_id}
Formal Title	{contact.formal_title}
Job Title	{contact.job_title}
Birth Date	{contact.birth_date}

Available Contribution Merge Fields

Name	Merge Field
Contribution ID	{contribution.contribution_id}
Date Received	{contribution.receive_date}
Non-deductible Amount	{contribution.non_deductible_amount}
Total Amount	{contribution.total_amount}
Fee Amount	{contribution.fee_amount}
Net Amount	{contribution.net_amount}
Transaction ID	{contribution.trxn_id}
Thank-you Date	{contribution.thankyou_date}
Cheque Number	{contribution.check_number}