

Navigating a Contact Profile

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Donor Management System

Want to learn more about this feature?

Watch our Training Webinars
here

Each Contact in your DMS has a unique Profile / record containing their contact details, giving history and Sections for you to store relevant information about them and their relationship to your organization.

To access the full Contact Profile of any Contact in the DMS, you can use the search bar in the Contacts Tab to search their name or email address and click on the name of the Contact.

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Sections of a Contact Profile

Summary

Mr. John Rainan Actions Edit

Summary Contributions 31 Opportunities 1 Activities 69 Relationships 1 Groups 9 Notes 1 Tags 2

Work Address 185 Spadina Avenue
Units 1-5
Toronto, ON M5T 3B2
Canada

Billing Address John Rainan
1234 St
Toronto, ON M1M 1M1
Canada

Home Address ON
Canada

Work Email johnr@canadahelps.org
Billing Email johnr@canadahelps.org

Home Mobile 6477826945
Work Voicemail 416-628-6948 ext. 2514

Work Website https://www.canadahelps.org

Summary Fields

- Total Contributions in the Last 12 Months: \$ 2,468.00
- Amount of last contribution: \$ 50.00
- Date of Last Contribution: 11/19/2020 7:34AM
- Date of First Contribution: 06/01/2020 7:33AM
- Largest Contribution: \$ 250.00
- Total Lifetime Contributions: \$ 2,468.00
- Count of Contributions: 31

Tags Staff Members Volunteers

Contact Type Individual
Contact ID / User ID 383 / 78
External ID

Gender Male
Date of Birth January 30th, 1993
Age 27 years

Employer CanadaHelps
Job Title DMS Success Manager
Recognition Name John
Source CanadaHelps

MailChimp Details

Delete Contact

Contact profile summary

- The Summary contains useful details like their contact information, communication preferences and a summary of their giving history.
- You can also [Delete](#) or [Restore](#) a Contact from this page.

Contributions

Jed Collins Actions Edit

Summary Contributions 5 Opportunities 1 Activities 13 Relationships 2 Groups 7 Notes 2 Tags 2

Contributions 5 DMS Recurring Contributions

Current Year-To-Date - \$ 280.00 **# Completed Contributions - 5** **Avg Amount - \$ 56.00**

Total - \$ 280.00 **# Completed - 5** **Avg - \$ 56.00**

Click arrow to view payment details. Add Contribution

Date	Amount	Fund	Campaign	Source	Method	Receipt No.	Thanked
May 11th, 2020 11:15 AM	\$ 10.00	General Fund	Spring Fundraiser 2020		CH - Cheque		-
May 6th, 2020 04:56 PM	\$ 20.00	General Fund	General Donations		Cash		-
May 4th, 2020 04:56 PM	\$ 50.00	General Fund	Spring Fundraiser 2020				-
February 4th, 2020 02:29 PM	\$ 50.00	General Fund					-
January 1st, 2020 02:30 PM	\$ 150.00	Endowment Fund	Holiday Drive				-

Contributions summary for the selected Contact

- View the record of all online and offline Contributions the Contact has made to your organization
- Have access to the total amount the Contact has contributed to the organization, a list of all past gifts, and the ability to [record a new Contribution](#)
- See a list of all the Contact's Recurring Contributions via CanadaHelps Payment Processor.

Contributions tab:

- CanadaHelps.org single Contributions
- CanadaHelps.org recurring Contributions
- Offline single Contributions
- Offline recurring Contributions
- DMS Payment Processor single Contributions

DMS Recurring Contributions tab:

- DMS Payment Processor recurring Contributions

Opportunities

The screenshot shows the 'Opportunities' page for contact 'Jed Collins'. The page includes a navigation menu with 'Opportunities' selected, a user profile 'DMS Charity Admin', and a sub-menu with 'Opportunities 1' selected. A table lists one opportunity: '2020 Summer Bash' with a type of 'Donation Cultivation', status of 'Submitted', and a requested amount of '\$ 500.00'. The owner is listed as 'Durocher, Julie'. There is an 'Add Opportunity' button and an 'Edit' button.

Opportunity Name	Type	Status	Requested	Received	Decision Date	Owner
2020 Summer Bash	Donation Cultivation	Submitted	\$ 500.00			Durocher, Julie

- View details on each Opportunity associated with the Contact
- You can also add new Opportunities by selecting the *Add Opportunity* button.

Activities

- See all Activities associated with the Contact such as performed Contributions, sent Emails, logged Calls and more
- You can also add new Activities by selecting the *New Activity* button.

Relationships

- View details about the Relationships between the Contact and other Contacts in the DMS
- You can also add new Relationships by selecting the *Add Relationship* button.

→ [Learn More about Relationships](#)

Groups

CanadaHelps.org | Home | **Contacts** | Contributions | Campaigns | Opportunities | Reports | Administer | DMS Charity Admin

Jed Collins

Summary | Contributions 5 | Opportunities 1 | Activities 11 | Relationships 1 | **Groups 1** | Notes 2 | Tags 0 | Change Log 11

+ Add to a group | Add

Regular Groups

Jed Collins has joined or been added to these group(s).

Group	Status	Date Added	Remove	Delete
New Donors	Added (by Admin)	Mar 3rd, 2020 3:45 PM		

Smart Groups

Jed Collins is currently included in these Smart group(s) (e.g. saved searches).

Group	Description
Major Gift Prospects	
Donors in Ontario between \$1-\$50	State/Province In Ontario Contribution Amount - greater than "1" AND less than "50"

Groups for the selected Contact

- View the details of Groups and Smart Groups the Contact has been added to
- You can also add the Contact to an existing Group by selecting the *Add to a group* button.

Notes

CanadaHelps.org | Home | **Contacts** | Contributions | Campaigns | Opportunities | Reports | Administer | DMS Charity Admin

Jed Collins

Summary | Contributions 5 | Opportunities 1 | Activities 11 | Relationships 1 | **Groups 1** | **Notes 2** | Tags 0 | Change Log 11

Add Note

Show 10 entries

Note	Subject	Date	Created By	Attachment(s)
Confirm with the donor before appreciation event.	Dietary Restrictions	Jun 4th, 2020 8:43 PM	DMS Charity Admin	View Edit
He likes tuna.	Has a cat named Stevens!	Jun 4th, 2020 8:43 PM	DMS Charity Admin	View Edit

Showing 1 to 2 of 2 entries | Previous 1 Next

Notes for the selected Contact

- View all Notes associated with the Contact
- Add a new Note by selecting the *Add Note* button
- When you add a Note, you will assign a subject, a privacy setting (you can determine if these notes will be available to other users of the DMS or just yourself) as well as the Note text
- You can also attach documents to the Note.

Tags

CanadaHelps.org Home **Contacts** Contributions Campaigns Opportunities Reports Administer DMS Charity Admin

Jed Collins Actions Edit

Summary Contributions 5 Opportunities 1 Activities 11 Relationships 1 Groups 1 Notes 2 **Tags 1** Change Log 13

Tag Tree

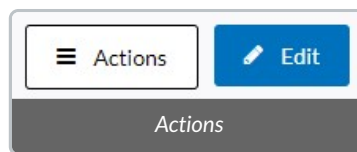
Filter List

- Staff Members
- USA
- Volunteers

Tags for the selected Contact

- View a list of all the Tags in the DMS and those Tags that have been assigned to the Contact (identified by the checkmark next to the Tag)
- From here you can add or remove tags from the Contact by clicking the checkboxes next to each Tag

Actions



Similar to the way you can perform Actions to Contacts from the Contacts Tab, you can also perform Actions within the Contact Profile.

1. To perform an Action, select the *Actions* button in the top right corner of the screen.
2. From here, a list of available Actions will appear
3. Select the Action that you wish to perform.


☰ Actions

 Edit

Record Activity:

 Meeting

 Call

 Send an Email

 Export Printable Documents

Add Opportunity

Add Relationship

Add Note

Add to Group

Tag Contact

Print Summary

 Create User Record

Perform Actions within the Contact profile