

Adding, Modifying & Deleting a Campaign

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Donor Management System

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This article will cover managing a single Campaign.

Considerations

General

- All fundraising Campaigns using **CanadaHelps** are automatically synced to your DMS daily, at around 6 am EST.
- You can add a new Campaign through the DMS to track offline (cash, cheque), non-CanadaHelps donations.
- **To add or modify a CanadaHelps campaign** (i.e. *customizable donation forms, Ticketed Events, P2P campaigns*), please do so via your CanadaHelps.org charity admin account.
 - Changes to CanadaHelps campaigns directly in the DMS will be overwritten the next time we sync your CanadaHelps data into your DMS.

Active & Inactive Campaigns

- Campaigns coming from CanadaHelps.org that are Inactive won't be automatically marked as Inactive in the DMS. CanadaHelps.org P2P and Events pages cannot be deactivated in the DMS.
- Since you might still be receiving recurring donations from these Inactive CH.org Campaigns, the same Campaign in the DMS needs to be Active to receive those donations.

Important: If you delete a campaign from your CH.org account, it will not be deleted in your DMS.

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Dashboard Contacts Contributions **Campaigns** Opportunities Reports DMS Mail

Settings | Help
DMSCA DMSCA

← Campaigns

Spring 2023 DM Appeal

Save Cancel

CAMPAIGN NAME *
Spring 2023 DM Appeal

CAMPAIGN TYPE [+ Add Campaign Type](#)
Direct Mail Appeal

FUND * [+ Add Fund](#)
General Fund

CAMPAIGN GROUP [+ Add Campaign Group](#)
- select Campaign Group -

ENTER A GOAL FOR YOUR CAMPAIGN

START DATE
02/02/2023 12:17PM

END DATE

URL

This campaign is active

Save Cancel

Activate or Deactivate the Campaign only in the DMS

Adding a Campaign

1. Go to the **Campaigns Tab** and select **Add Campaign** on the top right corner of the screen

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Search by campaign name

Period to All Campaigns **Add Campaign**

Name	Type	URL	Campaign Group	Start Date	End Date	Goal	Selected Period	All-time
2022 Giving Tuesday Campaign	Donation Form		Giving Tuesday	November 29th, 2022	November 30th, 2022	\$10,000.00	\$3,425.00	\$3,425.00
Andy Test Form	Donation Form						\$3,057.00	\$3,057.00
Bottle Drive	Other		Holiday Campaign Group 2022	November 25th, 2021	February 11th, 2022	\$10,000.00	\$27,431.85	\$27,431.85
Building Expansion Campaign	Email Appeals			December 19th, 2022	April 30th, 2024		\$4,030.00	\$4,030.00

Add a new Offline Campaign

2. On the next page, you will see the following options:

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← Campaigns

New Campaign

Save Cancel

CAMPAIGN NAME *

CAMPAIGN TYPE [+ Add Campaign Type](#)

Email Appeals

FUND * [+ Add Fund](#)

-select Fund-

CAMPAIGN GROUP [+ Add Campaign Group](#)

-select Campaign Group-

ENTER A GOAL FOR YOUR CAMPAIGN

START DATE

03/06/2023 09:49AM

END DATE

URL

This campaign is active

Save Cancel

Fill out the necessary fields to add your Offline Campaign

Fields:

- **Campaign Name:** the name of the Campaign.
- **Campaign Type:** the Type of the Campaign (i.e. *Charity Profile, CH Campaign, Donation Form, Events and P2P*). You can also add a new Campaign Type by selecting *+Add Campaign Type*.
- **Fund:** the Fund associated with the Campaign. You can also add a new Fund by selecting *+Add Fund*.
- **Campaign Group:** used to organize a group of Campaigns (e.g. *Holiday Events*). You can also add a new Campaign Group by selecting *+Add Campaign Group*.
- **Enter a Goal for your Campaign:** a monetary goal for your Campaign.
- **Start Date:** the date and time your Campaign is set to start.
- **End Date:** the date and time your Campaign is set to end.
- **URL:** The URL linking to your Campaign's landing page.
- **This Campaign Is Active:** leave this box checked to activate your Campaign. When marked as active, the Campaign will be searchable within [Advanced Search](#) functions and [Reports](#).

3. After entering all the necessary fields, select **Save** on either the top or bottom of the page.

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Settings | Help

DMSCA DMSCA

← Campaigns

New Campaign

Save Cancel

CAMPAIGN NAME *
Spring is in the Air Fundraiser

CAMPAIGN TYPE [+ Add Campaign Type](#)
 Email Appeals

FUND * [+ Add Fund](#)
General Fund

CAMPAIGN GROUP [+ Add Campaign Group](#)
-select Campaign Group-

ENTER A GOAL FOR YOUR CAMPAIGN
10,000

START DATE
03/06/2023 02:49PM x

END DATE
03/20/2023 x

URL

This campaign is active

Save Cancel

When ready, select Save

Modifying a Campaign

Note: To modify a Campaign originally added on CanadaHelps, you should make the changes directly on your CanadaHelps dashboard. Changes to CanadaHelps Campaigns directly in the DMS will be overwritten the next time we sync your CanadaHelps data into your DMS.

1. Go to the **Campaigns Tab** and search for the Campaign you wish to modify
2. Click on the **name of the Campaign** to access its Details

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Search by campaign name

Period to All Campaigns

Name	Type	URL	Campaign Group	Start Date	End Date	Goal	Selected Period	All-time
2022 GivingTuesday Campaign	Donation Form		GivingTuesday	November 29th, 2022	November 30th, 2022	\$10,000.00	\$3,425.00	\$3,425.00
Andy Test Form	Donation Form	🔗					\$3,057.00	\$3,057.00
Bottle Drive	Other		Holiday Campaign Group 2022	November 25th, 2021	February 11th, 2022	\$10,000.00	\$27,431.85	\$27,431.85
Building Expansion Campaign	Email Appeals			December 19th, 2022	April 30th, 2024		\$4,030.00	\$4,030.00

Select the name of your desired Campaign

3. On the next page, select **Edit** on the top right corner of the screen

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Settings | Help

DMSCA DMSCA

Campaign Title: 2022 GivingTuesday Campaign

Campaign Type: Donation Form

Fund: General Fund

Campaign Group: GivingTuesday

Goal: \$10,000.00

Start Date: Nov 29th, 2022 12:51 PM

End Date: Nov 30th, 2022 12:00 AM

Url: <https://www.canadahelps.org/en/dn/786>

Is Active: YES

Select Edit

4. After making all the necessary changes, select the **Save** button on either the top or bottom of the page.

The screenshot shows the '2022 GivingTuesday Campaign' form in the Wellness Avenue DMS. The form is titled '2022 GivingTuesday Campaign' and has a 'Save' button highlighted with a red box. The form fields are as follows:

- CAMPAIGN NAME ***: 2022 GivingTuesday Campaign
- CAMPAIGN TYPE**: + Add Campaign Type (Dropdown: Donation Form)
- FUND ***: + Add Fund (Dropdown: General Fund)
- CAMPAIGN GROUP**: + Add Campaign Group (Dropdown: GivingTuesday)
- ENTER A GOAL FOR YOUR CAMPAIGN**: 15,000.00 (highlighted with a red box)
- START DATE**: 11/29/2022 (Time: 12:51PM)
- END DATE**: 11/30/2022 (Time: 12:00AM)
- URL**: https://www.canadahelps.org/en/dn/786
- This campaign is active

At the bottom of the form, there is another 'Save' button highlighted with a red box. The footer of the page includes the copyright notice: © CanadaHelps 2000-2023. CanadaHelps is a registered charity | BN 896568417RR0001. Contact Us | Legal | Terms of Use | Privacy Policy.

When ready, select **Save** to add your Offline Campaign

Deleting a Campaign

Considerations:

- If you delete a campaign originally created in your CH.org account, **it will not be deleted in your DMS**. You can only delete an offline campaign in the DMS (i.e., one which has been **manually added to your DMS** and not linked to a [Ch.org](#) fundraising campaign).
- You can only delete an offline campaign for which **there are no contributions associated with the campaign**.

1. Go to the **Campaigns Tab** and search for the Campaign you wish to delete

2. Click on the name of the Campaign to access its Details

The screenshot shows the Wellness Avenue interface with the Campaigns tab selected. A search bar at the top is labeled "Search by campaign name". Below it, there are filters for "Period" and "All Campaigns", along with an "Add Campaign" button. A table lists several campaigns:

Name	Type	URL	Campaign Group	Start Date	End Date	Goal	Selected Period	All-time
2022 GivingTuesday Campaign	Donation Form	🔗	GivingTuesday	November 29th, 2022	November 30th, 2022	\$15,000.00	\$3,425.00	\$3,425.00
A Taste of Spring 2023	Direct Mail Appeal			February 2nd, 2023		\$15,000.00		
Andy Test Form	Donation Form	🔗					\$3,057.00	\$3,057.00
Bottle Drive	Other		Holiday Campaign Group 2022	November 25th, 2021	February 11th, 2022	\$10,000.00	\$27,431.85	\$27,431.85

A dark grey banner at the bottom of the table area contains the text: "Select the name of your desired Campaign".

3. On the next page, scroll down and select **Save** at the bottom left corner of the screen

The screenshot shows the details page for the campaign "A Taste of Spring 2023". The page includes an "Edit" button and a "Cancel" button at the top right. The campaign details are as follows:

Campaign Title	A Taste of Spring 2023
Campaign Type	Direct Mail Appeal
Fund	General Fund
Campaign Group	
Goal	\$15,000.00
Start Date	Feb 2nd, 2023 12:20 PM
End Date	
Url	
Is Active	YES

A red box highlights the "Delete" button at the bottom left of the page. A dark grey banner at the bottom of the page contains the text: "Scroll down and select Delete".

4. Then confirm your action by selecting **Delete Campaign**

⚠ WARNING: Are you sure you want to Delete the selected Campaign? A Delete operation cannot be undone. Do you want to continue?

✓ Delete Campaign

✕ Cancel

Confirm by selecting Delete Campaign