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

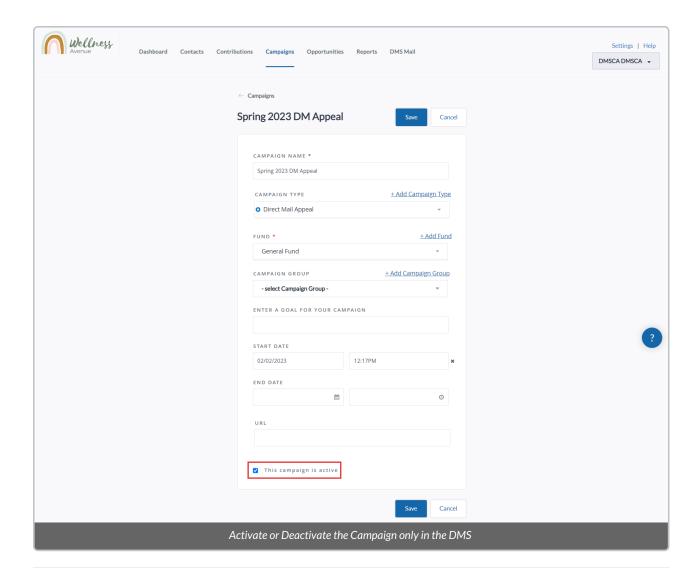
General

- 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

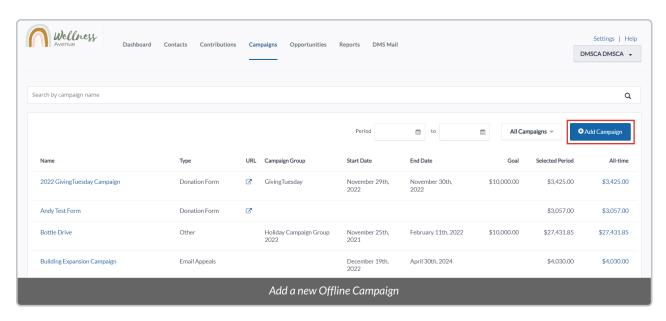
- Campaigns coming from CanadaHelps.org that are Inactive won't be automatically marked as Inactive in the DMS. CanadaHelps.org P2P and Events pages cannot be deactivated in the DMS.
- Since you might still be receiving recurring donations from these Inactive CH.org Campaigns, the same Campaign in the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

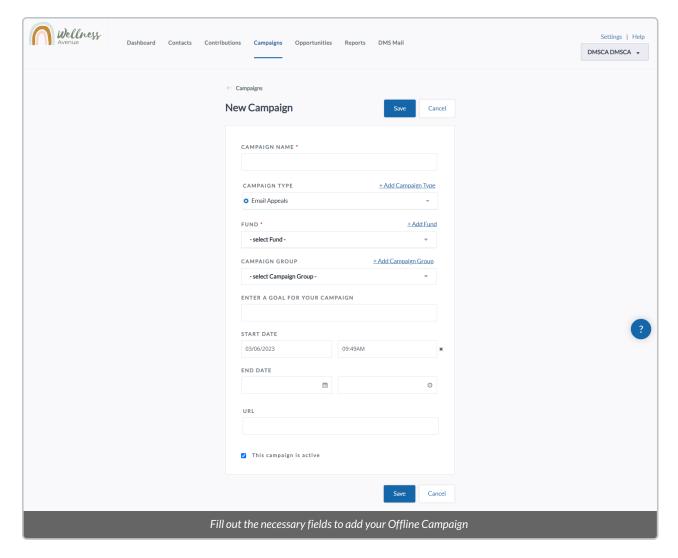


Adding a Campaign

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



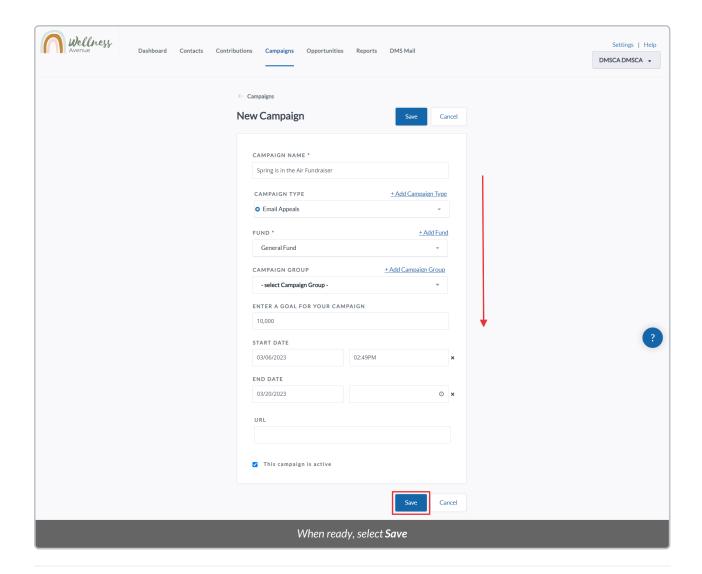
2. On the next page, you will see the following options:



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).

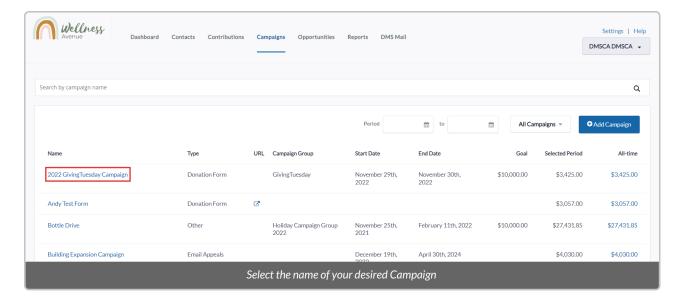
 You can also add a new Campaign Type by selecting +Add Campaign Type.
- Fund: the Fund associated with the Campaign. You can also add a new Fund by selecting +Add Fund.
- *Campaign Group:* used to organize a group of Campaigns (e.g. Holiday Events). You can also add a new Campaign Group by selecting +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.



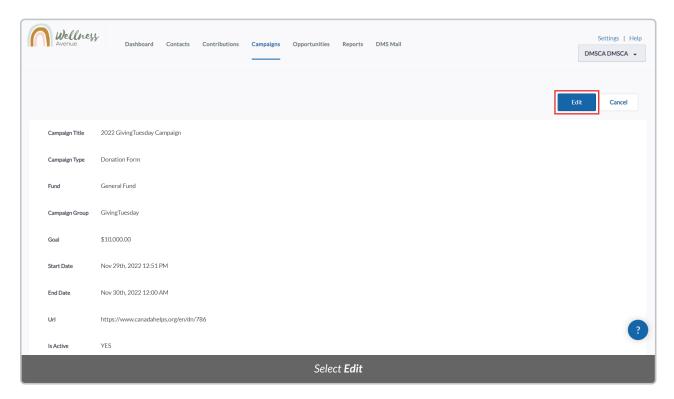
Modifying a Campaign

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.

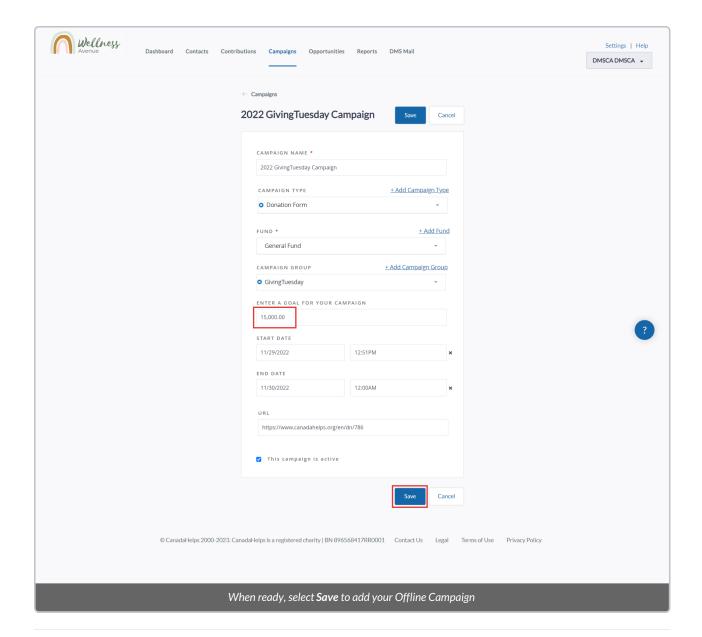
- 1. Go to the Campaigns Tab and search for the Campaign you wish to modify
- 2. Click on the name of the Campaign to access its Details



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



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

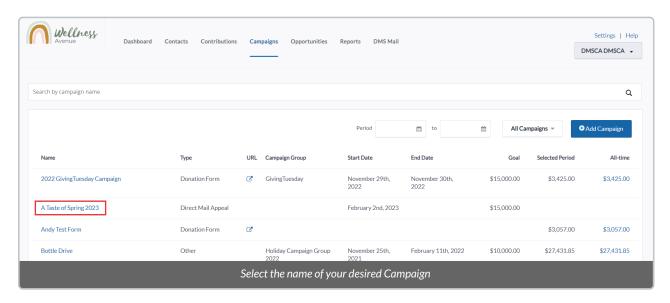


Deleting a Campaign

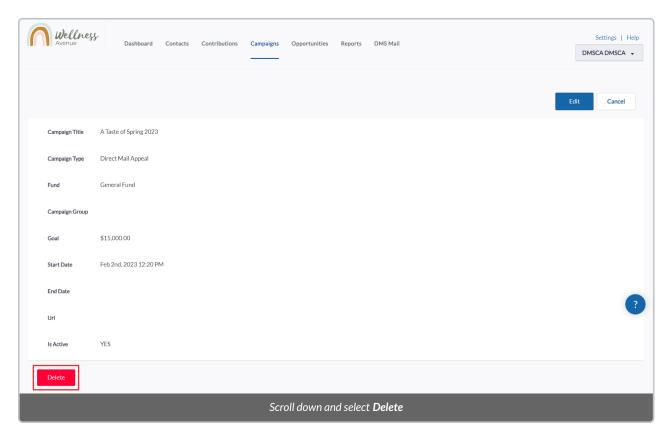
Considerations:

- 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



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



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

