

Navigating the Dashboard & Dashlets

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Donor Management System

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Overview

- Every time you log in to the DMS, you'll be directed to the **Dashboard Tab**.
- The **Dashboard Tab** can be customized by each unique user by selecting **Configure Your Dashboard** in the top left of their screen.
- You can also update the data on the page by selecting the **refresh icon** in the top left-hand corner of each dashlet report.

Dashlets

- Dashlets are mini-reports or widgets that contain insights about your Contacts, Contributions and Activities.
- You will be directed to select from the available Dashlets you wish to see when logging in to the DMS.
- **Build your own customized Dashlets** from the Reports tab - [learn more](#)

Configuring Your Dashlets

1. After logging in, you'll see a few **Standard Dashlets and Charts**:

- **New Email Replies:** Your User's latest inbound emails (whenever a Contact sends an email to your *DMS From Email*).
- **Latest Contributions:** Your Top 10 Contributions listed in your DMS.
- **Activities:** Your User's latest scheduled [Activities](#). This does not include Contributions or emails and letters

The screenshot shows the Wellness Avenue dashboard with the following components:

- Navigation:** Dashboard (active), Contacts, Contributions, Campaigns, Opportunities, Reports, DMS Mail, Settings, Help.
- Header:** Wellness Avenue logo, DMSCA DMSCA dropdown.
- Section:** CanadaHelps DMS Home
- Available Dashlets:** 3 Available Dashlets
- Active Dashlets:**
 - Last Year Inc. Today:** Quarterly Contribution Summary bar chart showing data for 1 of 2022, 2 of 2022, 3 of 2022, 4 of 2022, and 1 of 2023. Includes download links for SVG and PNG.
 - New Email Replies:** Table of email activity.

Contact Name	Contact Email	Activity Type	Subject	Date Received
A. L. Kostenko	angelakostenko88@gmail.com	Inbound Email	Re: Re: testing inbound	Nov 9th, 2022 1:12 PM
Jubin O	jubino@canadahelps.org	Inbound Email	Re: Basic - Thank You Email	Nov 21st, 2022 12:37 PM
Jubin O	jubino@canadahelps.org	Inbound Email	Re: Basic - Thank You Email	Nov 21st, 2022 12:44 PM
Tejal g	tejalg@canadahelps.org	Inbound Email	Re: Basic - Thank You Email	Nov 23rd, 2022 10:32 AM
Tejal g	tejalg@canadahelps.org	Inbound Email	Re: Trial activity inbound email	Nov 24th, 2022 1:27 PM
Laura Peppiatt	chelps_test@outlook.com	Inbound Email	Re: Bulk Email Test	Nov 25th, 2022 9:42 AM

Dashboard

2. You can also see a list of *Available Dashlets* to add to your Home page:

The screenshot shows the Wellness Avenue dashboard with the following components:

- Navigation:** Dashboard (active), Contacts, Contributions, Campaigns, Opportunities, Reports, DMS Mail, Settings, Help.
- Header:** Wellness Avenue logo, DMSCA DMSCA dropdown.
- Section:** CanadaHelps DMS Home
- Available Dashlets:** 3 Available Dashlets (highlighted with a red box)
- Active Dashlets:**
 - Last Year Inc. Today:** Quarterly Contribution Summary bar chart showing data for 1 of 2022, 2 of 2022, 3 of 2022, 4 of 2022, and 1 of 2023. Includes download links for SVG and PNG.
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Tejal g	tejalg@canadahelps.org	Inbound Email	Re: Basic - Thank You Email	Nov 23rd, 2022 10:32 AM
Tejal g	tejalg@canadahelps.org	Inbound Email	Re: Trial activity inbound email	Nov 24th, 2022 1:27 PM
Laura Peppiatt	chelps_test@outlook.com	Inbound Email	Re: Bulk Email Test	Nov 25th, 2022 9:42 AM
Laura	chelps_test@outlook.com	Inbound	Re: Bulk Email Test	Nov 25th, 2022

Available Dashlets

3. Drag your desired Dashlet from the list into the boxes labelled *Left Column* or *Right Column*.

The screenshot shows the 'CanadaHelps DMS Home' interface. At the top, there is a navigation bar with 'Wellness Avenue' logo, menu items (Dashboard, Contacts, Contributions, Campaigns, Opportunities, Reports, DMS Mail), and 'Settings | Help' with a 'DMSCA DMSCA' dropdown. Below the navigation, a section titled '3 Available Dashlets' contains three buttons: 'Fiscal Year to Date', 'Activities for Dashlet', and 'Webform Sign-ups'. A red arrow points from the 'Activities for Dashlet' button to a 'Quarterly Contribution Summary' dashlet. Another red arrow points from the 'Webform Sign-ups' button to a 'New Email Replies' dashlet. The 'Quarterly Contribution Summary' dashlet features a bar chart with the following data:

Period	Contribution
1 of 2022	~90,000
2 of 2022	~100,000
3 of 2022	~105,000
4 of 2022	~100,000
1 of 2023	~150,000

The 'New Email Replies' dashlet displays a table of email activity:

Contact Name	Contact Email	Activity Type	Subject	Date Received
A. L. Kostenko	angelakostenko88@gmail.com	Inbound Email	Re: Re: testing inbound	Nov 9th, 2022 1:12 PM
Jubin O	jubino@canadahelps.org	Inbound Email	Re: Basic - Thank You Email	Nov 21st, 2022 12:37 PM
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Laura Peppiatt	chelps_test@outlook.com	Inbound Email	Re: Bulk Email Test	Nov 25th, 2022 9:42 AM
Laura Peppiatt	chelps_test@outlook.com	Inbound Email	Re: Bulk Email Test	Nov 25th, 2022 9:45 AM
		Inbound Email	Re: Re: Testy Inboundy	Nov 28th, 2022 5:14 PM

At the bottom of the dashboard area, there is a dark grey bar with the text 'Reposition Dashlets'.

4. Once satisfied with the position of your Dashlets, **your dashboard will be automatically saved.**

Performing Actions on Dashlets

The DMS allows you to manage all of your Dashlets with a variety of actions located on the top of each Dashlet.

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

CanadaHelps DMS Home

3 Available Dashlets

a b c d e

Last Year Inc. Today

Quarterly Contribution Summary

Download chart (SVG) | Download chart (PNG)

New Email Replies

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Laura Bennett	chelps_test@outlook.com	Inbound Email	Re: Bulk Email Test	Nov 25th, 2022 8:42 AM

Dashlet Actions

- a) See the corresponding Report for that Dashlet.
- b) Expand the Dashlet to a pop-up. Useful if you'd like to see more than 10 records at once.
- c) Refresh the data displayed on the Dashlet.
- d) Retract the Dashlet for a more compact view in your dashboard.
- e) Remove the Dashlet from your dashboard, sending it to your list of *Available Dashlets*.