

# Navigating the Campaigns Tab

Last Modified on 05/12/2023 3:04 pm EDT

## Donor Management System

You can use the **Campaigns tab** in your DMS to track and centralize all donations pertaining to the same fundraising appeal, whether online or offline.

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## Overview

By selecting *Campaigns* in the Main Menu, you will be directed to the main screen of the Campaigns Tab.

The main screen of the Campaigns Tab presents a list of every fundraising Campaign you have undertaken online through CanadaHelps or have added directly in the DMS.

To access a Campaign record, simply click on the campaign's name. You can also [add your own Campaigns](#) from this Tab by selecting *Add Campaign* in the top right corner.

The screenshot shows the 'Campaigns' tab interface. At the top, there is a navigation menu with 'Campaigns' highlighted. Below the menu is a search bar and a table of campaigns. The table has columns for Name, Type, URL, Campaign Group, Start Date, End Date, Goal, Selected Period, and All-time. The 'Campaigns' menu item is highlighted with a red box.

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
All Tribute Donations	Donation Form	<a href="#">🔗</a>					\$3,002.00	\$3,002.00
Bottle Drive	Other		Holiday Campaign Group 2022	November 25th, 2021	February 11th, 2022	\$10,000.00	\$26,923.24	\$26,923.24
Building Expansion Campaign	Email Appeals			December 19th, 2022	April 30th, 2024		\$4,030.00	\$4,030.00

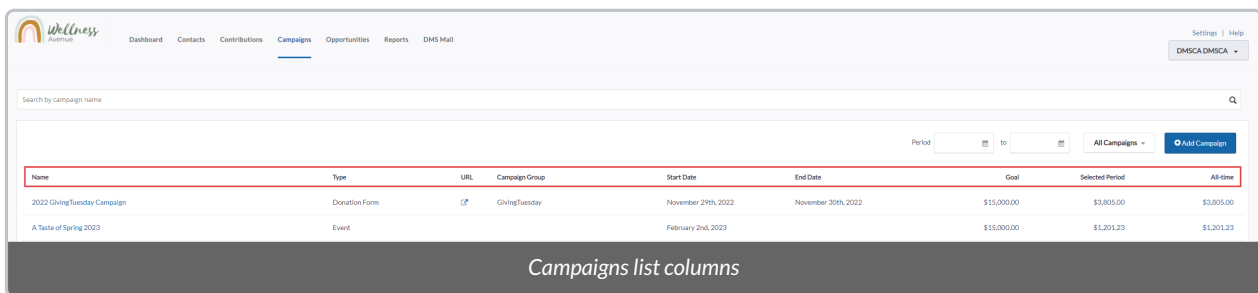
Overview of the Campaigns Tab

## Considerations

- 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.
- If you delete a campaign originally created in your CH.org account, **it will not be deleted in your DMS.** This action will be overridden the next time we sync your CanadaHelps data into your DMS.

## Main Campaigns Screen

### List Columns



The screenshot shows the 'Campaigns' screen in the DMS. At the top, there is a navigation bar with 'Wellness Avenue' logo and menu items: Dashboard, Contacts, Contributions, Campaigns (active), Opportunities, Reports, and DMS Mail. A search bar is located below the navigation. The main content area displays a table of campaigns. The table has the following columns: Name, Type, URL, Campaign Group, Start Date, End Date, Goal, Selected Period, and All-Time. Two campaigns are listed: '2022 GivingTuesday Campaign' and 'A Taste of Spring 2023'. Below the table, there is a dark grey bar with the text 'Campaigns list columns'.

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	\$3,805.00	\$3,805.00
A Taste of Spring 2023	Event			February 2nd, 2023		\$15,000.00	\$1,201.23	\$1,201.23

- **Name:** the name of the Campaign.
- **Type:** the Type of the Campaign (e.g. Donation Form, Events, Peer-to-Peer, etc.)
- **URL:** icon redirecting you to the Campaign's landing page
- **Campaign Group:** group created in the DMS to help organize your Campaigns (e.g. Holiday Events)
- **Start Date:** the date your Campaign is set to start.
- **End Date:** the date your Campaign is set to end.
- **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 the Campaign.

### Rows

Rows: 50    
 Page 1    
 ← 1 - 50 of 19328 →

Cycle through pages at the bottom right corner of the Tab

- The default number of Rows displayed on the Campaigns Tab is set to 50.
- To adjust the number of Rows of Campaigns displayed in the list view, scroll to the bottom of the page and press the “up” or “down” arrows on the box that is labelled Rows.
- To the right of the box labelled Rows are the number of pages of rows, the total number of Campaigns in your DMS, as well as the ability to navigate to the next page list view.
- To navigate to the next page of Campaigns, click the arrow pointing right on the far right side of the page. Click on the arrow pointing left to go back to the previous page.

## Managing a Campaign

### Viewing a Campaign's Details

1. To view details about a specific Campaign, select the Campaign name.

Wellness Avenue

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

Settings | Help

DMSCA DMSCA

Search by campaign name

Period  to  All Campaigns

Name	Type	URL	Campaign Group	Start Date	End Date	Goal	Selected Period	All-time
<b>2022 GivingTuesday Campaign</b>	Donation Form		GivingTuesday	November 29th, 2022	November 30th, 2022	\$10,000.00	\$3,425.00	\$3,425.00
Andy Test Form	Donation Form	<a href="#">🔗</a>					\$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 to see its details

2. You'll then be directed to the **Campaign Details** page where you can see and edit all key details about that Campaign.

The screenshot shows the 'Campaigns' page in the Wellness Avenue system. The navigation bar includes Dashboard, Contacts, Contributions, Campaigns (selected), Opportunities, Reports, and DMS Mail. There are 'Settings' and 'Help' links, and a dropdown menu for 'DMSCA DMSCA'. The main content area displays the following details for the '2022 GivingTuesday Campaign':

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

Buttons for 'Edit', 'Cancel', and 'Delete' are visible. A footer message reads: 'See all the details of your desired Campaign'.

## Fields

- **Campaign Title:** the name of the Campaign.
- **Campaign Type:** the Type of the Campaign (i.e. *Charity Profile, CH Campaign, Donation Form, Events and P2P*).
- **Fund:** the Fund associated with the Campaign.
- **Campaign Group:** used to organize a group of Campaigns (e.g. *Holiday Events*).
- **Goal:** 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.
- **Is Active:** indicates that your Campaign is active.

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## Viewing Donations to a Campaign

1. To view all Contributions associated with a particular Campaign, click on its **All-Time \$** amount

Wellness Avenue

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

Settings | Help

DMSCA DMSCA

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	<a href="#">🔗</a>					\$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 All-time Amount of your desired Campaign to see a breakdown of all its donations

2. You'll then be directed to a screen with a list of all Contributions associated with that Campaign.

**Tip:** Here, you can perform Actions on one or more of this Campaign's Contributions. You can also manually record an offline Contribution to have it count towards this campaign.

Wellness Avenue

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

Settings | Help

DMSCA DMSCA

Search by contributor name or email

Advanced Search

Actions  Selected Records Only  All 11 Records

All Contributions

Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
February 16th, 2023 02:24 PM	<a href="#">▶</a> Rahmani Tamara	\$500.00	General Fund	Building Expansion Campaign	DMS Manual	Cheque	Completed	WELL0000076	✓
January 26th, 2023 02:00 PM	<a href="#">▶</a> Poulin Amelie	\$100.00	General Fund	Building Expansion Campaign		CH - Cheque	Completed	WELL00000667	✓
January 26th, 2023 02:00 PM	<a href="#">▶</a> Margo Mullin	\$100.00	General Fund	Building Expansion Campaign		CH - Cheque	Completed	WELL00000691	✓
January 26th, 2023 02:00 PM	<a href="#">▶</a> John Borjovi	\$750.00	General Fund	Building Expansion Campaign		CH - Cheque	Completed	WELL00000668	✓
January 26th, 2023 02:00 PM	<a href="#">▶</a> Lu Andy	\$45.00	General Fund	Building Expansion Campaign		CH - Cheque	Completed	WELL00000669	✓

Image caption

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## Filtering Your Campaigns

### By Date

1. To filter all your Campaigns by a specific Start Date and End Date, visit the main Campaign tab.
2. Here, select the a start and end date you wish to filter by in the empty **Date Period** fields.

Wellness Avenue | Dashboard | Contacts | Contributions | **Campaigns** | Opportunities | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

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 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	<a href="#">🔗</a>					\$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
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Filter by Campaign Period

## By Campaign Type

1. To filter all your Campaigns by Type, visit the main Campaign tab.
2. Here, select **All Campaigns** and then choose your desired Campaign Type

**Note:** The default Campaign types in your DMS include *Charity Profile*, *CH Campaign*, *Donation Form*, *Events* and *P2P*, but you can add new Campaign types under **Settings > Manage Campaigns**, or when creating a new offline Campaign.

Wellness Avenue | Dashboard | Contacts | Contributions | **Campaigns** | Opportunities | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

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 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	<a href="#">🔗</a>					\$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
CanadaHelps Partners	CanadaHelps Partners						\$500.00	\$500.00
Charity Profile	Charity Profile						\$1,437.28	\$1,437.28

Filter by Campaign Type

What's Next?

Now that you're familiar with the main Campaigns tab as well as a campaign's detail screen, learn more about the difference between a [CanadaHelps \(online\) campaign](#), and a [DMS \(offline\) campaign](#).