

# Adding & Modifying Activity Types

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## Donor Management System

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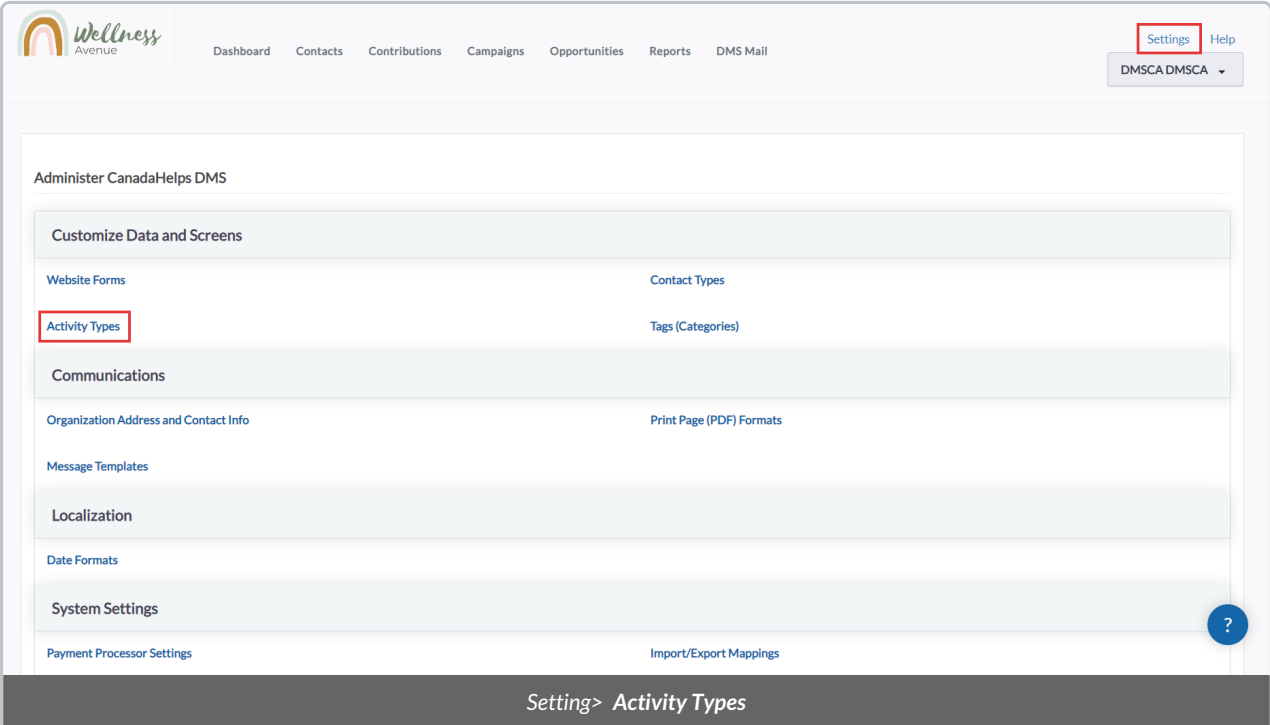
Activities are used to track key interactions that take place between your charity and the Contacts within the DMS.

There are many pre-set Activity Types available, but if these do not suit the needs of your charity, you can create Custom Activity Types.

—> [Learn more about Activities](#)

## Adding a Custom Activity Type

1. Visit your administrative Settings
2. Under **Customize Data and Screens** select **Activity Types**



The screenshot displays the administrative interface for Wellness Avenue. The top navigation bar includes the logo, a menu with items like Dashboard, Contacts, Contributions, Campaigns, Opportunities, Reports, and DMS Mail, and a Settings/Help dropdown. The main content area is titled 'Administer CanadaHelps DMS' and features a 'Customize Data and Screens' section. Within this section, 'Activity Types' is highlighted with a red box. Other options listed include Website Forms, Contact Types, Communications, Tags (Categories), Organization Address and Contact Info, Print Page (PDF) Formats, Message Templates, Localization, Date Formats, System Settings, and Payment Processor Settings. A breadcrumb trail at the bottom reads 'Setting > Activity Types'.

3. On the next page, you will see a list of all of your existing Activity Types

**Important:** We strongly recommend that you **do not modify the default Activity Types** on this page.

#### 4. Select **Add Activity Type**

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

### Activity Type Options

Activities are 'interactions with contacts' which you want to record and track. This list is sorted by component and then by weight within the component.

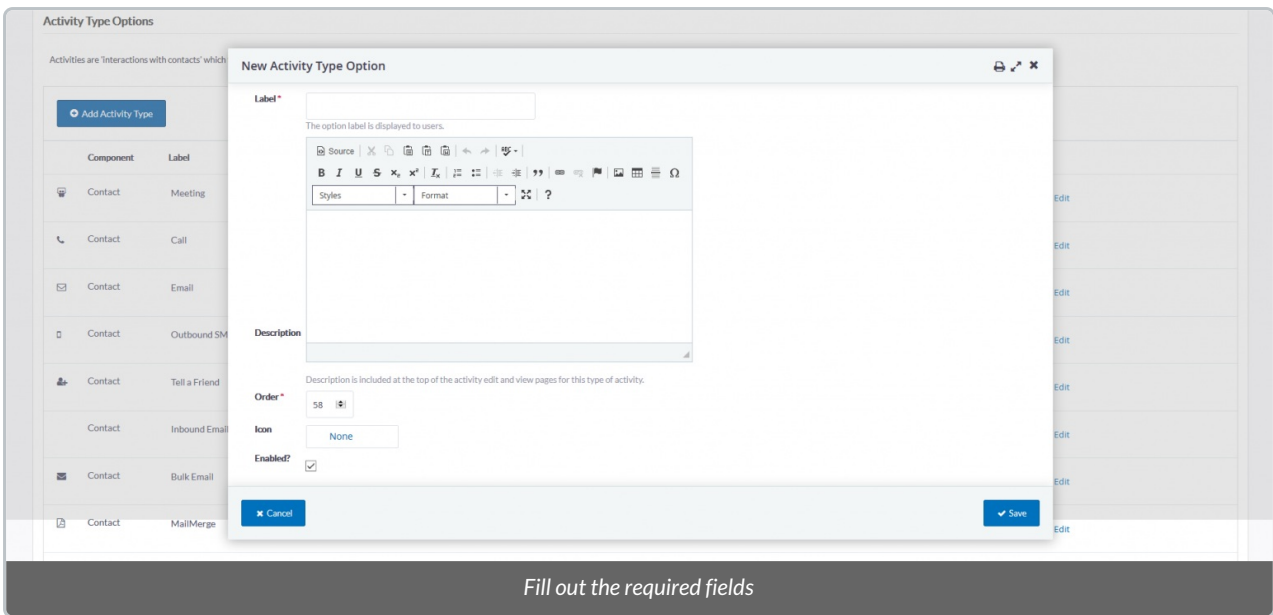
**Add Activity Type**

Component	Label	Activity Type ID	Description	Order	Reserved	Enabled?
Contact	Email	3	Email sent.	↓ ↑	Yes	Yes <a href="#">Edit</a>
Contact	Call	2		↑ ↓	Yes	Yes <a href="#">Edit</a>
Contact	Outbound SMS	4	Text message (SMS) sent.	↑ ↓	Yes	Yes <a href="#">Edit</a>
Contact	Tell a Friend	9	Send information about a contribution campaign or event to a friend.	↑ ↓	Yes	Yes <a href="#">Edit</a>
Contact	Inbound Email	12		↑ ↓	Yes	Yes <a href="#">Edit</a>

**Select Add Activity Type**

#### 5. In the pop-up window, choose the criteria of your custom Activity Type:

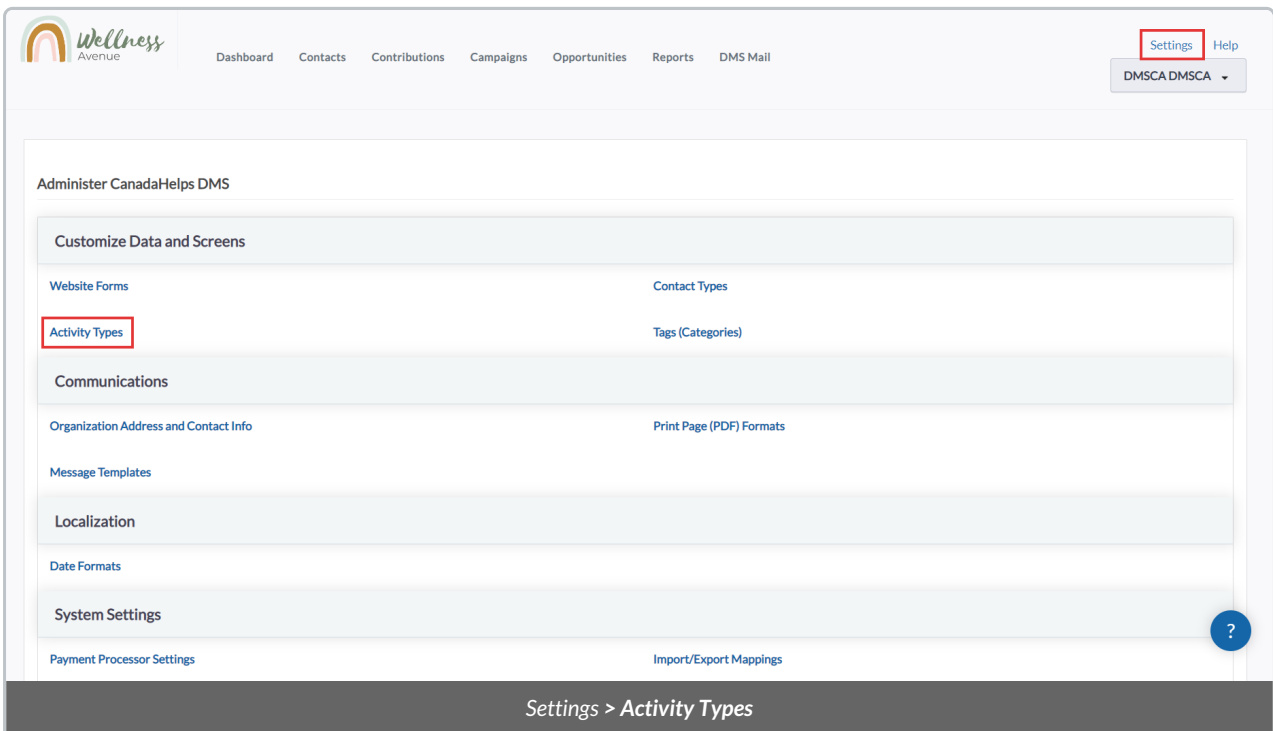
- **Label:** The name of your custom Activity Type. This name will only be visible to members of your organization.
- **Description:** Add a description of your Activity Type.
- **Order:** Choose the order in which the available Activity Types appear in menus throughout the DMS. e.g. if the Order Number of the Activity is “2” that Activity Type will be listed second in any Activity Type menus in your DMS.
- **Icon:** Choose an icon to represent your Activity Type.
- **Enabled?:** Checking this box will Enable your custom Activity Type.



6. Once ready, select **Save** to view your new, custom Activity listed on the **Activity Type** page.

## Modifying Activity Types













1. Visit your administrative **Settings**
2. Under **Customize Data and Screens** select **Activity Types**



3. On the next page, you will see a list of all of your existing Activity Types. Select from the following options:

- **Edit:** Edit the criteria of the Activity Type.

- **Disable / Enable (Custom Activity Types only):** Custom Activity Types can be Enabled or Disabled. Enabled Activity Types will be an available Activity Type to apply to your Contacts in the DMS. Disabled Activities will not be available to apply to Contacts within your DMS.
- **Delete (Custom Activity Types only):** Delete any custom Activity Types from your DMS.

	Contact	Meeting	1			Yes	Yes	<a href="#">Edit</a>
	Contact	Mailchimp Mailing	57			No	Yes	<a href="#">Edit</a> <a href="#">Disable</a> <a href="#">Delete</a>
	Contact	Contact Type Changed	58	Contact type changed		No	Yes	<a href="#">Edit</a> <a href="#">Disable</a> <a href="#">Delete</a>
	Contact	solicitor	59			No	Yes	<a href="#">Edit</a> <a href="#">Disable</a> <a href="#">Delete</a>
	Contact	Picture	61	Photo documentation		No	Yes	<a href="#">Edit</a> <a href="#">Disable</a>

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You'll be able to manage each Activity Type