

Adding, Modifying & Deleting a Campaign Group

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Donor Management System

Table of Contents:

- [What is a Campaign Group?](#)
- [Adding a New Campaign Group](#)
 - [From the Campaigns Tab](#)
 - [From your administrative Settings](#)
- [Managing and Deleting Campaign Groups](#)
- [What's Next?](#)

What is a Campaign Group?

Campaign Groups can be used to **group together multiple (related) online and offline Campaigns**, making your reporting that much easier.

For example, let's say you're running a Walk-a-thon and you're simultaneously using a CanadaHelps **ticketed Events** page (for registration), a CanadaHelps **Peer-to-Peer** campaign page (for the participant fundraising pages), and you've created an **offline campaign** in your DMS where you record any offline contributions made to this campaign (e.g., cash, cheques, etransfers). Each of these will display as a separate Campaign in your DMS, although they're all associated with the same upcoming charity event (your Walk-a-thon).

Grouping these 3 campaigns under a **Campaign Group** will allow you to report on the offline contributions alongside your CanadaHelps Events ticket and P2P Campaign contributions.

Your DMS comes with **preset Campaign Groups** that you can use: **Annual Giving**, **Special Events**, and **Third Party Events**, but you can add your own custom Campaign Groups through the Campaigns Tab or your administrative Settings (see below).

Adding a New Campaign Group

From the Campaigns Tab

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

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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	🔗					\$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 campaign

2. On the next page, fill in your new Campaign details.

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Settings | Help

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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 x

END DATE

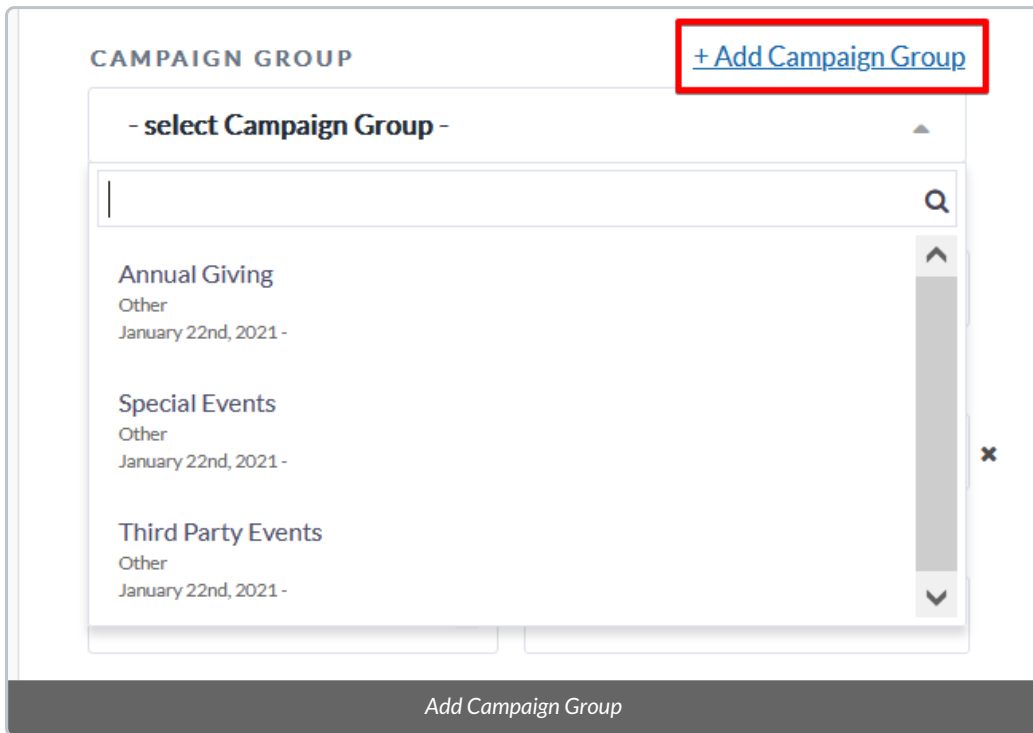
URL

This campaign is active

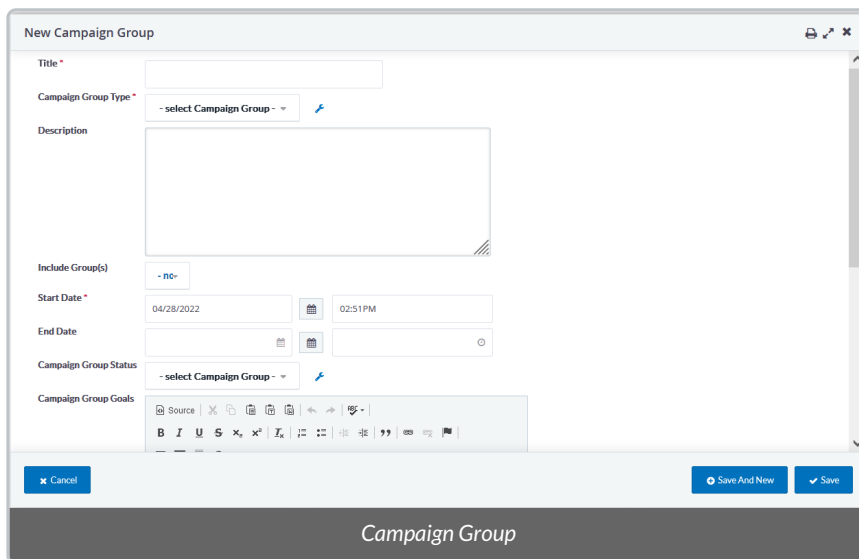
Save Cancel

New Campaign

3. Under Campaign Group, select from the 3 preset Campaign Groups, **Annual Giving**, **Special Events**, and **Third Party Events**, or **+Add Campaign Group**.



4. When adding a new Campaign Group, you can fill in the following details:



The screenshot shows a 'New Campaign Group' form with the following elements:

- Campaign Group Status:** A dropdown menu with the text '- select Campaign Group -' and a blue wrench icon to its right.
- Campaign Group Goals:** A rich text editor with a toolbar containing icons for source, undo, redo, bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, link, unlink, and help. Below the toolbar are 'Styles' and 'Format' dropdowns.
- Revenue Goal:** A text input field.
- External ID:** A text input field.
- Is Active?:** A checked checkbox.
- Buttons:** 'Cancel', 'Save And New', and 'Save' buttons are located at the bottom of the form.
- Label:** The text 'Campaign Group' is displayed in a dark bar at the bottom right of the window.

- **Title:** name for the Campaign Group, for your internal tracking
- **Campaign Group Type:** preset options are Other and CH Campaign. Add more descriptive Types by selecting the blue wrench icon.
- **Description:** optional
- **Include Group(s):** associate existing Contact Groups or Smart Groups with this Campaign Group
- **Start Date**
- **End Date:** optional
- **Campaign Group Status:** preset options are Planned, In Progress, Completed, Cancelled. Add more descriptive Statuses by selecting the blue wrench icon.
- **Campaign Group Goals:** optional
- **Revenue Goal:** optional, for your internal tracking
- **External ID:** optional
- **Is Active?:** document whether this Campaign Group is associated with Campaigns that are currently active and in progress

5. When ready, select **Save**.

6. Then, you will be able to select your newly created Campaign Group from the dropdown menu. [Continue adding the rest of the Campaign Details, and select Save.](#)



From your administrative Settings

1. Visit your **Settings** and under the CanadaHelps Campaign Group section, select **Campaign Groups**.

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Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings Help

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Administer CanadaHelps DMS

Customize Data and Screens

- Website Forms
- Activity Types
- Communications
- Localization
- Date Formats

System Settings

- Payment Processor Settings
- Misc (Undelete, PDFs, Limits, Logging, etc.)
- CanadaHelps Contribute
- DMS Mail

Contact Types

- Contact Types
- Tags (Categories)
- Print Page (PDF) Formats

Import/Export Mappings

- Import/Export Mappings
- Receipt Settings

GL Accounts

- GL Accounts
- Manage Groups

CanadaHelps Campaign Group

- Campaign Groups

Headers, Footers, and Automated Messages

- Headers, Footers, and Automated Messages
- From Email Addresses
- Mallchimp Settings

DMS Templates

- DMS Templates
- Draft, Schedule, and Manage DMS Mails

Settings > Campaign groups

2. Select Add Campaign Group.

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Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings Help

DMSCA DMSCA

Campaign Group Dashboard

Campaign Groups

Add Campaign Group

Search Campaign Groups

ID	Title	Description	Start Date	End Date	Type	Status	Active?	
8	GivingTuesday		October 12th, 2022		GH Campaign		Yes	Edit Disable

Add campaign group

3. Fill in the following details:

The screenshot shows the top portion of the 'New Campaign Group' form. It includes a 'Title' field, a 'Campaign Group Type' dropdown menu, a large 'Description' text area, an 'Include Group(s)' dropdown, 'Start Date' and 'End Date' fields with calendar icons, another 'Campaign Group Status' dropdown, and a 'Campaign Group Goals' rich text editor with a toolbar. At the bottom are 'Cancel', 'Save And New', and 'Save' buttons.

The screenshot shows the bottom portion of the 'New Campaign Group' form. It features a 'Campaign Group Status' dropdown, a 'Campaign Group Goals' rich text editor, a 'Revenue Goal' field, an 'External ID' field, and an 'Is Active?' checkbox. The 'Cancel', 'Save And New', and 'Save' buttons are also visible at the bottom.

- **Title:** name for the Campaign Group, for your internal tracking
- **Campaign Group Type:** preset options are Other and CH Campaign. Add more descriptive Types by selecting the blue wrench icon.
- **Description:** optional
- **Include Group(s):** associate existing Contact Groups or Smart Groups with this Campaign Group
- **Start Date**
- **End Date:** optional
- **Campaign Group Status:** preset options are Planned, In Progress, Completed, Cancelled. Add more descriptive Statuses by selecting the blue wrench icon.
- **Campaign Group Goals:** optional
- **Revenue Goal:** optional, for your internal tracking
- **External ID:** optional
- **Is Active?:** document whether this Campaign Group is associated with Campaigns that are currently active and in progress

5. When ready, select **Save**.

Managing and Deleting Campaign Groups

1. Visit your **administrative Settings**

2. Under **CanadaHelps Campaign Group**, select **Campaign Groups**.

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Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings Help

DMSCA DMSCA

Administer CanadaHelps DMS

Customize Data and Screens

Website Forms Contact Types

Activity Types Tags (Categories)

Communications

Organization Address and Contact Info Print Page (PDF) Formats

Message Templates

Localization

Date Formats

System Settings

Payment Processor Settings Import/Export Mappings

Misc (Undelete, PDFs, Limits, Logging, etc.) Receipt Settings

CanadaHelps Contribute

Manage Campaigns GL Accounts

Funds Manage Groups

CanadaHelps Campaign Group

Campaign Groups

DMS Mail

Headers, Footers, and Automated Messages DMS Templates

From Email Addresses Draft, Schedule, and Manage DMS Mails

Mailchimp Settings

Settings > Campaign groups

3. Select one of the following buttons next to the Campaign Group you wish to modify:

Campaign Group Dashboard

[Add Campaign Group](#)

Search Campaign Groups

ID	Title	Description	Start Date	End Date	Type	Status	Active?		
8	GivingTuesday		October 12th, 2022		CH Campaign		Yes	Edit	Disable Delete
7	Re-Engagement Emails	Re-engagement emails to inactive subscribers who haven't opened or clicked through an email in the last 90 days.	October 6th, 2022		Other	In Progress	Yes	Edit	Disable Delete
4	Holiday Campaign Group 2022		April 28th, 2022		Other		Yes	Edit	Disable

Edit Campaign group

- **Edit:** modify the details of the Campaign Group (i.e. Title, Start Date, End Date, Description, Status, Type, etc).
- **Disable:** mark the Campaign Group as inactive. The Campaign Group will no longer be an option to select in the Campaign details, but the information will be retained in your DMS. The Campaign Group can be reactivated at any time.
- **Delete:** delete the record of the Campaign from your DMS permanently. This option is only best if the Campaign Group has been added in error.

What's Next?

Next, learn to [perform an Advanced Search](#) for a specific Campaign Group's contributions and to [generate Contribution Reports and filtering by one or more Campaign Groups](#).