# [Donor Management System] May 30, 2022

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### **Donor Management System**

## What's New

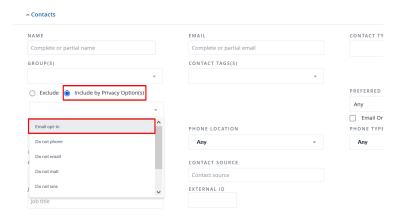
- CanadaHelps Sync Improvements
  - Ticketed Events Sync: When selling Events tickets through CanadaHelps.org, you can add an Advantage
    and description of the Advantage. Now, any Advantage description that has been added to the Events
    ticket within the transaction will sync over to your DMS to improve data tracking
  - Custom Questions from your Custom Donation Forms: If a custom question has been added to a form on CanadaHelps.org, the question and answers will sync over with each Contribution transaction. To access, follow our steps here

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### **New Communication Preference**

For Contacts who have explicitly consented to receiving emails from your organization, this can now be
tracked using the Email Opt-In communication field. Email Opt-In is a new searchable field through
Advanced Search in the Contacts tab, so that you can segment your Contact list and communicate with your
Contacts with confidence



Add the Email Opt-In designation to your Contacts by selecting Edit on a Contact Profile and then navigating
to the Privacy preferences section

Privacy
✓ Email Opt-in  ☐ Do not phone  ☐ Do not email  ☐ Do not mail  ☐ Do not sms  ☐ Do not trade  ☐ NO BULK EMAILS (User Opt Out)

## **New Learning Resources**

- Learn how to find each answer to your Custom Questions from your CanadaHelps donation forms click to read more
- Learn to track your donations with DMS Funds and CH Funds click to watch our new video or read the written guide