

[Donor Management System] May 30, 2022

Last Modified on 06/02/2022 1:16 pm EDT

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](#)
 -

^ Custom Question

CUSTOM QUESTION(S)

IS THERE AN ANSWER TO THE SELECTED QUESTION?

-select-

Did you like the event?

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

^ Contacts

NAME

Complete or partial name

EMAIL

Complete or partial email

CONTACT TYPE

GROUP(S)

CONTACT TAGS(S)

Exclude Include by Privacy Option(s)

PREPARED

Any

Email Or

PHONE LOCATION

Any

PHONE TYPE

Any

CONTACT SOURCE

Contact source

EXTERNAL ID

Job title

Do not phone

Do not email

Do not mail

Do not sms

Email opt-in

- 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](#)