

[Donor Management System] November 30, 2022

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What's New?!

1. New Feature: Web Submission Forms

- Introducing two Web Forms that you can use to **collect e-newsletter subscriptions and volunteer sign ups** right from your website. Customize the submission forms and easily embed them directly on your site with a quick copy/paste. Any sign ups will then sync directly into your DMS and these preferences will update on each [Contact's profile](#).

---> Check out our article on [Web Submission Forms](#) to see how they work


Email Opt-in Form example:

I'd like to receive email communications, including news and updates, from Wellness Ave. I understand I can unsubscribe at any time.

First Name *

Last Name *

Email (Primary) *

I'm not a robot  reCAPTCHA
Privacy - Terms

SUBSCRIBE TO OUR NEWSLETTER

Volunteer Sign-Up Form example:

Want to lend a hand? We'd love to have you!

First Name *

Last Name *

Email *

Primary phone number *

Tell us what inspired you to help.

I'm not a robot



reCAPTCHA
Privacy - Terms

SIGN ME UP

2. New Data Sync: Payment Methods

- Now, you can use the [Advanced Search in Contributions](#) to filter for any donations made through CanadaHelps where the donor chose to pay using **Apple Pay** or **Google Pay**. Filtering by these new payment methods can help you understand how your donors are giving, so you can know where and how to focus your fundraising efforts.

The screenshot shows the 'Advanced Search in Contributions' interface on CanadaHelps.org. The search criteria are as follows:

- CONTRIBUTOR NAME OR EMAIL:
- CONTACT TAG(S):
- CONTACT TYPE:
- DATE RECEIVED:
- CONTRIBUTION AMOUNTS: From To
- TRANSACTION ID:
- CAMPAIGN GROUPS:
- THANK YOU SENT:
- EXCLUDE INCLUDE BY PRIVACY OPTION(S)

Search filters on the right side:

- CONTRIBUTOR GROUP(S):
- SEARCH IN TRASH (DELETED CONTACTS):
- CONTRIBUTION STATUS:
- PAYMENT METHOD: (highlighted with a red box)
- INVOICE NUMBER:
- CAMPAIGN:
- CONTRIBUTION RECEIPTED:
- CURRENCY:
- FUND:
- GL ACCOUNT:
- SOURCE:
- PREFERRED COMMUNICATION METHOD:

