

# [Donor Management System] February 27, 2023

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## What's New!

You may have noticed a few new changes to the look of your DMS. Check them out below!

### 1. The Home tab is now your Dashboard

- Now, every time you log into your DMS, you'll land on your **Dashboard**. All of the same great features are still available, including the ability for each user to customize their Dashboard with their preferred Dashlets (mini-reports).
  - **TIP:** Learn more about [customizing your Dashboard](#)

The screenshot shows the DMS interface with the 'Dashboard' tab highlighted in the navigation menu. The main content area displays two dashlets:

**Opportunities to Track**

Prospect	Opportunity Type	Opportunity Amount	Application Deadline
Amadu A	Donation	\$5,000.00	December 1st, 2022
A. L. Kostenko	Gifts In Kind	\$250.00	
Accessibility Foundation	Grant	\$250,000.00	December 30th, 2022
Accessibility Foundation	Grant	\$50,000.00	
Accessibility Foundation	Pledge	\$10,000.00	
Alex Fergie	Grant	\$15,000.00	September 1st, 2022

**Monthly Contribution Summary 2019-2022**

The donut chart displays monthly contributions from 2019 to 2022. The legend includes the following months: Oct of 2022, Sep of 2022, May of 2022, Jun of 2022, Nov of 2022, Aug of 2022, Jul of 2022, Apr of 2022, Dec of 2022, Dec of 2021, Jan of 2022, Nov of 2021, Mar of 2022, Oct of 2021, Feb of 2022, Sep of 2021, and Mar of 2021.

### 2. A new DMS Mail tab

- For easier access to the DMS Mail (i.e., bulk email) tool, you can now click into it directly from the new **DMS Mail** tab on your main menu. You'll be brought straight to the *Draft, Schedule, and Manage DMS Mails* landing page where you can create your DMS mailings.
  - **TIP:** Learn all about the [DMS Mail tool](#)

Draft, Schedule, and Manage DMS Mails

[New Mailing](#)

Mailing Name

Mailing Date  
 Any ▾

Created or Sent by

- Mailing Status
- Scheduled
  - Running
  - Complete
  - Paused
  - Canceled
  - Draft / Unscheduled

Is Mailing Archived?  
 Yes  No

Language  
 - all languages - ▾

Campaign Groups

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Mailing Name	Language	Status	Created By	Created Date	Sent By	Scheduled	Started	Completed	Campaign Group	Action
Valentine's Day 50/50 Raffle	English (Canada)	Complete	DMSCA DMSCA	Feb 24th, 2023 2:52 PM	DMSCA DMSCA	Feb 24th, 2023 2:53 PM	Feb 24th, 2023 2:53 PM	Feb 24th, 2023 2:53 PM		<a href="#">Report</a> <a href="#">Copy</a> <a href="#">More</a>

### 3. Your administrative Settings have moved

You can now find all of the administrative settings that were previously housed under your *Administer* tab, in the handy **Settings** section of your DMS. You can easily access these administrative Settings from any of your main DMS tabs, by simply navigating to the top right-hand corner of any page.

### 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](#)

