[Donor Management System] February 27, 2023

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

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

Is Mailing Archived?
Yes   No

Language
- all languages -

Campaign Groups

Search

Mailing Status
Scheduled
Running
Complete
Paused
Canceled
Draft / Unscheduled

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, 2 5 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z [{ All

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		Report Copy More

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.

Dashboard   Contacts   Contributions   Campaigns   Opportunities   Reports   DMS Mail

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

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