Donation Settings

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This article covers how to add and edit donation-related fields used when entering Donations in Charity OS.
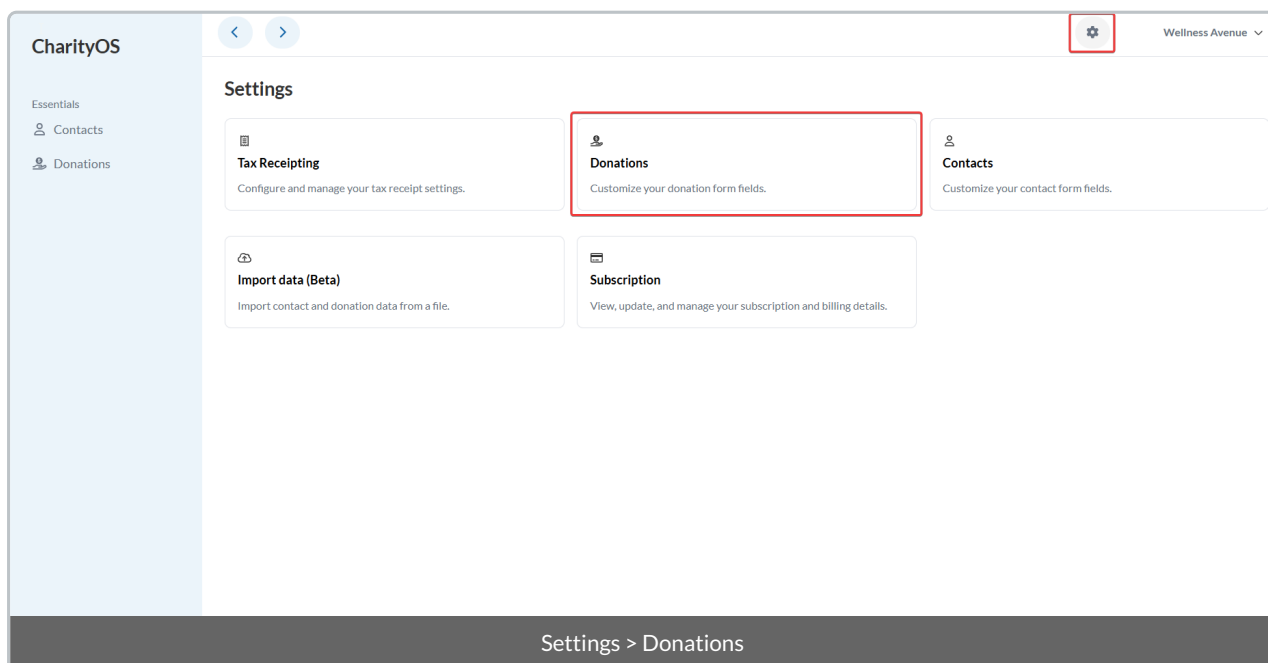
Donation Settings

1. To access **Settings**, click on the gear icon in the top-right corner of your account.

2. Select **Donations**.

Settings > Donations

Fund

Funds from your CanadaHelps account are synced in real-time and cannot be deleted within Charity OS. However, you can disable them at any time to hide them from view when adding a new donation.

- To add a new one, click the **Add Fund** button.
  - By default, the option *Make this fund eligible for tax receipting* is selected. Uncheck this option if donations made to this fund is not eligble for a tax receipt.
- To edit, hover over the field and click the **pencil icon**.

- To disable, hover and click on **Disable**.

- To delete, hover and click on **Delete**.

- To reorder, simply click and drag them into your preferred order.

Donation Settings

Fund	Payment method	Campaign	Source

ⓘ Some funds can not be edited. These may be default funds created by system or Funds synced from CanadaHelps.

Show disabled funds ⬤ **+ Add Fund**

	Fund name	Display Order	Tax receipt eligible	Status
⠿	new fund/new fund	0	✓	Enabled
⠿	Programe de mise en forme physique/Fitness Initiative Fund	1	✓	Enabled

Payment method

Default Payment method name options cannot be edited or deleted. However, you can disable them at any time to hide them from view when adding a new donation.

- To add a new one, click the **Add Payment method** button.

- To edit, hover over the field and click the **pencil icon**.

- To disable, hover and click on **Disable**.

- To delete, hover and click on **Delete**.

- To reorder, simply click and drag them into your preferred order.

Donation Settings

Fund	Payment method	Campaign	Source

ⓘ Default Payment method name options cannot be edited or deleted; they can only be disabled.

Show disabled Payment method ⬤ **+ Add Payment method**

	Payment method	Display Order	Status
⠿	Cash/Comptant	2	Enabled
⠿	Cheque/Chèque	3	Enabled

Campaign

Profile Campaigns from your CanadaHelps account are synced in real-time and cannot be deleted within Charity OS. However, you can disable them at any time to hide them from view when adding a new donation.

- To add a new Campaign, click the **Add Campaign** button.

- To edit, hover over the field and click the **pencil icon**.

- To disable, hover and click on **Disable**.

- To delete, hover and click on **Delete**.

- To reorder, simply click and drag them into your preferred order.

Donation Settings

| Fund | Payment method | Campaign | Source |

ⓘ Campaigns synced from your CanadaHelps account cannot be edited or deleted; but they can be disabled.

Show disabled campaigns ◯   **+ Add Campaign**

	Campaign name	Display Order	Status
⠿	New Building	1	Enabled
⠿	Giving Tuesday 2024	2	Enabled

Source

Source allows you to track the origin of donations (e.g. offline, event-based). Default source (Offline) cannot be edited, deleted or disabled.

- To add a new Source, click the **Add Source** button.

- To edit, hover over the field and click the **pencil icon**.

- To disable, hover and click on **Disable**.

- To delete, hover and click on **Delete**.

- To reorder, simply click and drag them into your preferred order.

Donation Settings

| Fund | Payment method | Campaign | Source |

ⓘ Default source (Offline) cannot be edited, deleted or disabled.

Show disabled Source ◯   **+ Add Source**

	Source	Display Order	Status
⠿	Offline/Manuel	1	Enabled