# **Donation Settings**

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

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### **Donation Settings**

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

#### 2. Select Donations.

CharityOS	< >		🗘 Wellness Avenue 🗸						
Essentials	Settings								
දු Contacts නී Donations	Tax Receipting     Configure and manage your tax receipt settings.	<b>2</b> Donations Customize your donation form fields.	පී Contacts Customize your contact form fields.						
	Import data (Beta)     Import contact and donation data from a file.	Subscription View, update, and manage your subscription and billing details.							
	Set	ttings > 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 c	lefault funds created by system or F	unds synced from CanadaHelps.	
				Show disabled funds + Add Fur
	Fund name	Display Order	Tax receipt eligible	Status
	new fund/new fund	0	$\checkmark$	Enabled
	Programe de mise en forme physique/Fitness Initiative Fund	1	$\checkmark$	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**

Payment method	Campaign	Source		
It Payment method nam	e options canno	t be edited or de	eleted; they can only be disabled.	
				Show disabled Payment method 🔵 + Add Payment meth
Payment method			Display Order	Status
Cash/Comptant			2	Enabled
Cheque/Chèque			3	Enabled
	t Payment method nam Payment method Cash/Comptant	t Payment method name options canno Payment method Cash/Comptant	t Payment method name options cannot be edited or de Payment method Cash/Comptant	t Payment method name options cannot be edited or deleted; they can only be disabled.          Payment method       Display Order         Cash/Comptant       2

# 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		
<li>Gampa</li>	aigns synced from your (	CanadaHelps ac	count cannot be	edited or deleted; but they can be disable	d.
					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				
Defau	lt source (Offline) canno	t be edited, dele	ted or disabled.				
						Show disabled Source	+ Add Source
	Source			Display Order	Sta	atus	
	Offline/Manuel			1	E	Enabled	