Adding, Modifying & Deleting Funds

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Donor Management System

DMS Funds allow you to record where each donation is allocated within your organization. You may receive donations with no fund designation, which can be tracked within a General Fund. By default, your DMS will have a General Fund and In-Kind Fund, as required by the Canadian Revenue Agency.

You may also receive donations that are allocated to a specific initiative or program funding, as requested by your donors. You can also easily add new Funds in the DMS yourself.

Note: Funds in the DMS vary from your **CH Funds**, which come from your CanadaHelps contributions and allow a donor to **designate their donation towards a specific program or initiative** by choosing from a list that you provide them.

Learn more about adding and modifying your CH (Charity) Funds in your CanadaHelps.org Charity Account here.

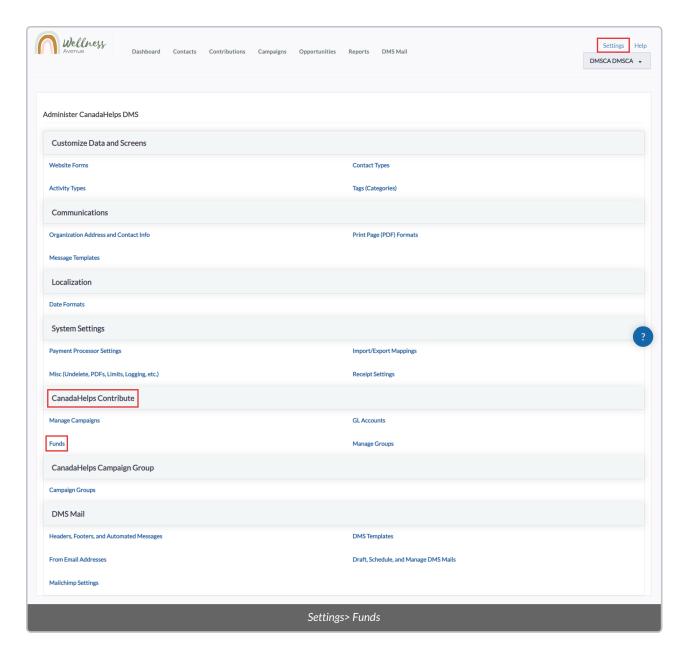
Note: By default, your **CH Funds** will be assigned to your **General Fund or Unassigned Fund in your DMS.** To assign your CH Funds to a separate DMS Fund, please follow further instructions here.

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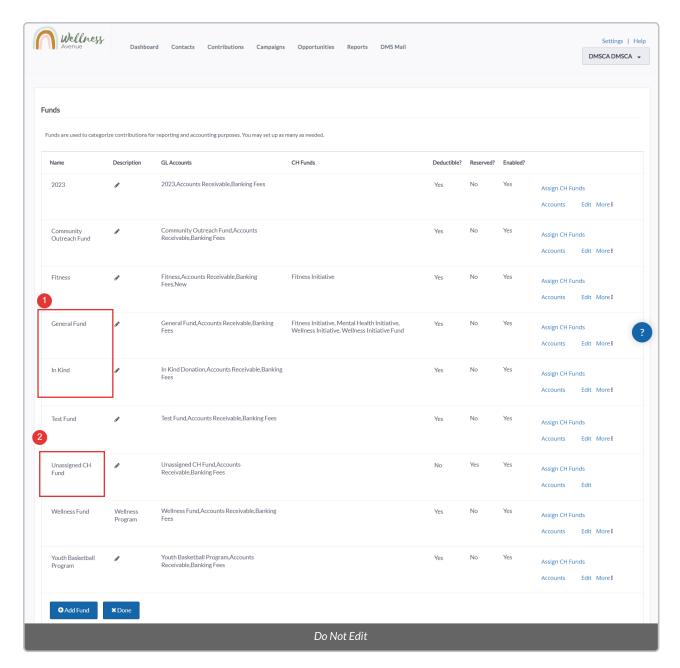
Adding a Single Fund

- 1. Visit your Administrative Settings.
- 2. Under CanadaHelpsContribute, select Funds

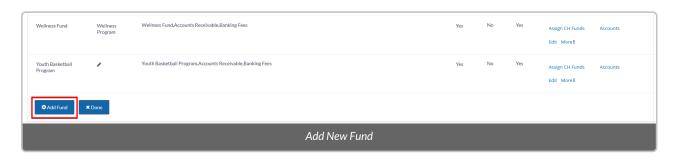


3. On the next page, you will see list of default Funds (1) and Unassigned CH Funds (2)

 $\textbf{Important:} \ Do \ not \ modify \ the \ names \ of \ these \ 2 \ default \ Funds, \ General \ \& \ In \ Kind \ Fund.$

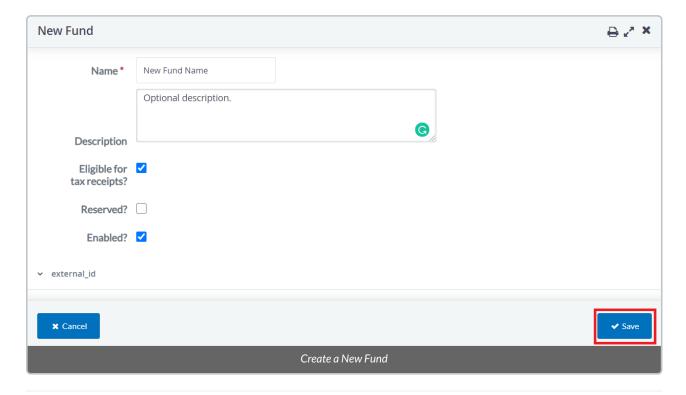


4. Select Add Fund at the bottom left corner of the screen



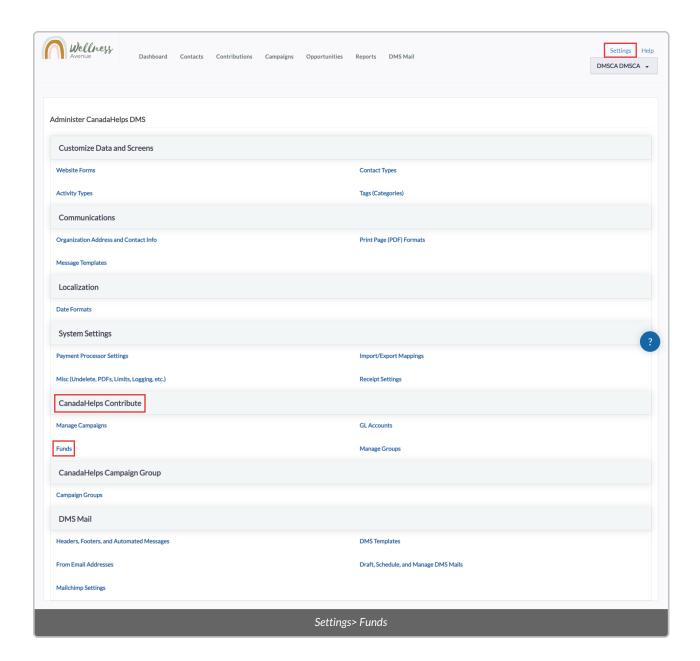
- 5. Next, you need to add the necessary information associated with your new Fund
 - Name: the name of the Fund.
 - Description: optional description of the Fund.
 - *Eligible for tax receipts?*: leave this box checked if you want any Contributions associated with this Fund to be eligible for Receipting. If you'd like to disable Tax Receipting for this Fund, uncheck the box.

- Reserved?: leave this unchecked to enable this Fund to all of your DMS Users.
- Enabled? leave this checked to enable this Fund.
- external_id: legacy field that will be removed soon. Please ignore this.
- 6. When ready, select Save to add your new Fund



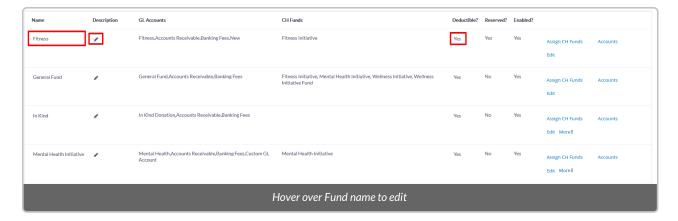
Modifying a Single Fund

- 1. Visit your Administrative Settings.
- 2. Under *CanadaHelpsContribute*, select *Funds*



3. You can easily hover your mouse over Name, Description and Deductible? to edit them.

Important: Do not modify the names of the 2 default Funds, General Fund & In Kind.



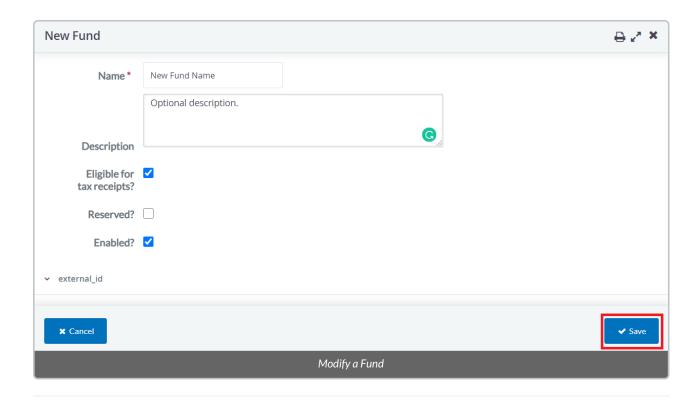
4. Select *Edit* next to the Fund you want to modify



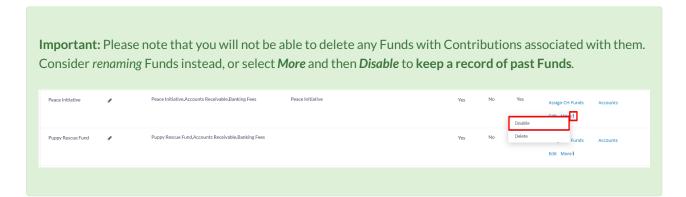
5. Next, you can modify all the options associated with the Fund

- Name: the name of the Fund.
- Description: optional description of the Fund.
- *Eligible for tax receipts?*: check this if you want any Contributions associated with this Fund to not be eligible for Receipting.
- Reserved?: leave this unchecked to enable this Fund to all of your DMS Users.
- Enabled? leave this checked to enable this Fund.
- external_id: legacy field that will be removed soon. Please ignore this.

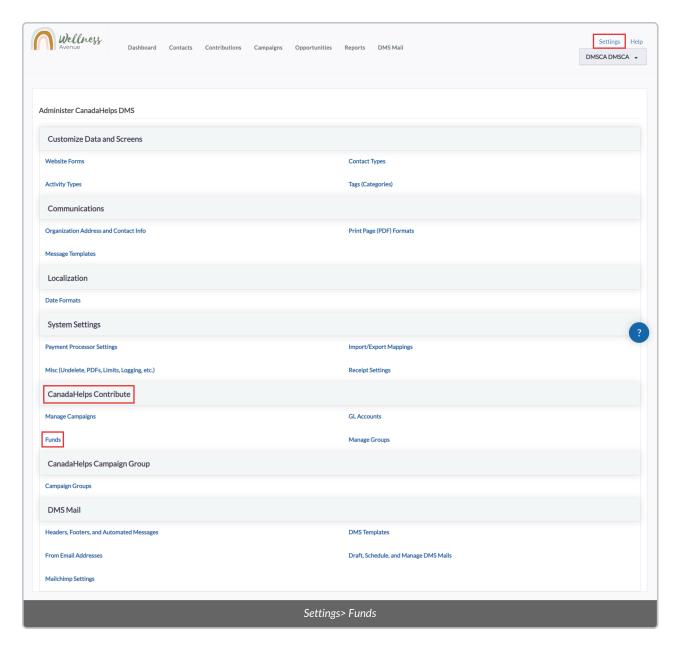
6. When ready, select Save to modify the Fund



Deleting a Single Fund



- 1. Visit your Administrative Settings.
- 2. Under *CanadaHelpsContribute*, select *Funds*



3. Select *More* and then *Delete*. A warning message will display; if you are sure you would like to delete the Fund, select *Delete*.

