

How to Track Your Fundraising Efforts in the DMS

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Donor Management System

The Donor Management System allows you to perform Advanced Searches on [Contacts](#) and [Contributions](#), create Contact [Groups](#), and generate [Reports](#). But first, it's important to understand how to track all of this data effectively in the DMS.

While you may occasionally continue tracking your **online** fundraising efforts (i.e., donations made strictly through CanadaHelps.org) using your CanadaHelps charity account, the Donor Management System will allow you to more **accurately track all of your fundraising data** (i.e., donations made through CanadaHelps *and offline*) **in one centralized location**.

Below are some of the different ways that your charity can use the DMS to track your fundraising efforts.

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Check out this video explaining how to track Fundraising Efforts in the DMS:

Campaigns

Campaigns are your appeals that are shared with current and potential donors. **Campaigns indicate where the money is coming from**, they are the way you fundraise. There are 2 main **Campaign Types**:

1. Campaigns from CanadaHelps.org - Campaigns that are created through CanadaHelps.org and synced automatically with your DMS. (Watch our [CanadaHelps Fundraising Tool Webinars](#))

- **Donation Form** – forms embedded in your website or for a specific appeal where donors can make

donations to your organization

- **Ticketed Event** – forms embedded in your website where donors can purchase [Event Tickets](#) for Events hosted by your organization.
- **Peer-to-Peer Campaign (P2P)** – allow your supporters to fundraise on your behalf by creating their own fundraising teams or joining as individual participants
- **Charity Profile** – public profile page on [CanadaHelps.org](#) where donors can make donations to your organization
- **Profile page Campaign** – a fundraising page hosted right on your Charity Profile in [CanadaHelps.org](#)

2. **Offline Campaigns** - [DMS Campaigns](#) that are **not created in CanadaHelps.org**. Can be used to track cash, cheque, or in-kind contributions for an offline appeal ([manually entered/offline contributions](#))

Campaigns, whether online or offline, are an incredibly useful way to track total donation amounts received from a specific CH donation form, events page, P2P campaign, or offline fundraising appeal (e.g., a direct mail appeal) and can help you determine where to focus your fundraising efforts.

In particular, new CH Donations Forms can be built for each of your unique email marketing campaigns. Let's say we send out a Holiday Campaign Bulk Email in the DMS and link a unique Holiday-themed Donation Form made specifically for this mailing. A great way to measure the [effectiveness of a mailing](#) would be to track all donations coming in through the unique donation form, which can inform the way that we solicit donations in the future.

Once **Campaigns** are assigned to [Contributions](#) in the DMS, you will be able to perform Advanced Searches on [Contacts](#) and [Contributions](#), create [Contact Groups](#), and generate [Reports](#) filtered by **Campaigns** in the DMS.

Fundraising Tool Campaigns

Each **Fundraising Tool Campaign** that you create using one of the tools in your [CanadaHelps.org](#) account will be automatically synced to your DMS as its own corresponding [Campaign](#).

--->Learn more about [what syncs from CanadaHelps to the DMS here](#).

Name	Type	URL	Campaign Group	Start Date	End Date	Goal	Selected Period	All-time
2022 GivingTuesday Campaign	Donation Form	🔗	GivingTuesday	November 29th, 2022	November 30th, 2022	\$15,000.00	\$3,425.00	\$3,425.00
A Taste of Spring 2023	Event			February 2nd, 2023		\$15,000.00		
Andy Test Form	Donation Form	🔗					\$3,057.00	\$3,057.00
Bottle Drive	Peer-to-Peer		Holiday Campaign Group 2022	November 25th, 2021	February 11th, 2022	\$10,000.00	\$27,431.85	\$27,431.85

- Reminders:**
- The sync is only one way, from CanadaHelps to the DMS. **Any changes to your CanadaHelps Campaigns will have to be made from your charity account at CanadaHelps.org.**
 - CanadaHelps Campaigns will sync automatically with the DMS daily at **11:00 AM EST**.

So, when donors make a donation to any one of your **Fundraising Tool Campaigns** through CanadaHelps.org, that **Contribution will be tracked in your DMS** as part of the corresponding **Campaign** in the DMS.

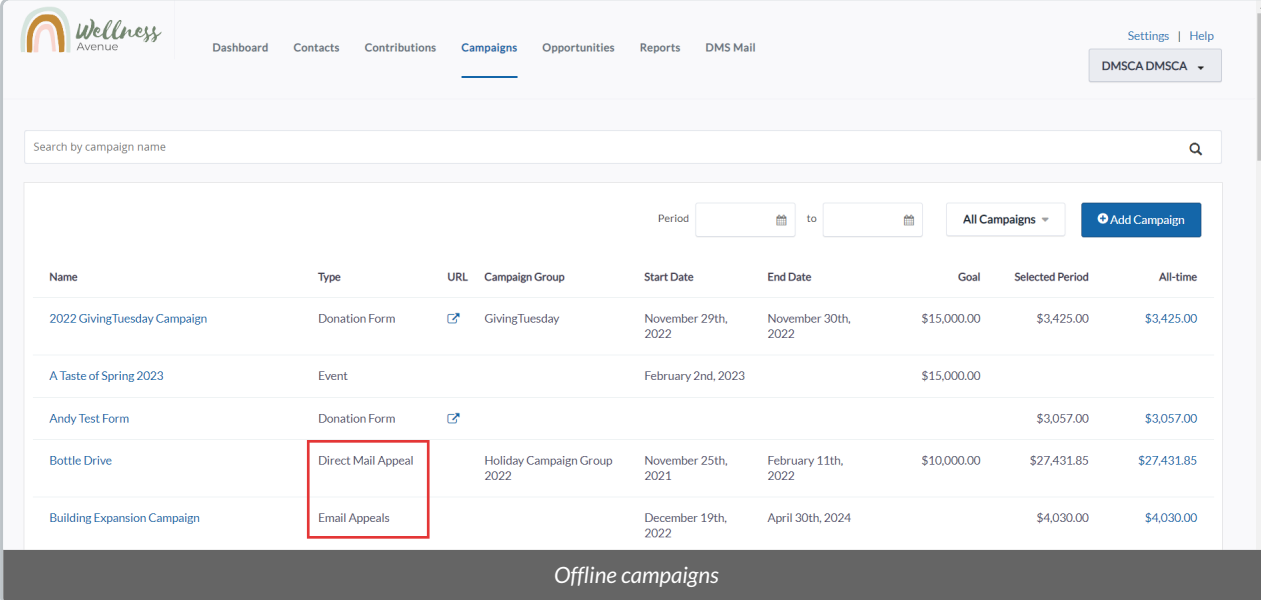
Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
<input type="checkbox"/> March 6th, 2023 11:34 AM	👤 Lucas Froese	\$1,000.00	General Fund	Golf Tournament	DMS Manual	Cheque	Completed	WELL00000928	<input checked="" type="checkbox"/>
<input type="checkbox"/> March 6th, 2023 02:26 AM	👤 Maya Karolina	\$1.23 (Recurring)	Fitness		DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed		-
<input type="checkbox"/> March 6th, 2023 02:26 AM	👤 Benjamin Franklin	\$1.23	Fitness	Bottle Drive	DMS Payments Credit Card	Credit Card	Completed		-

That said, even if a donor makes an offline Contribution (i.e., a donation made directly to your organization [cash, cheques, etc.] and not through the CanadaHelps tool), you can still **manually record that Contribution** as part of the **Fundraising Tool Campaign in the DMS**, so that you can track all donations (both online and offline) to this Campaign in one place.

Offline (DMS) Campaigns

You may also be running fundraising appeals not using one of the CanadaHelps fundraising tools. We refer to these as **Offline Campaigns**. As a reminder, you can [create your own Offline Campaigns in the DMS](#).

Once you've created an **Offline Campaign**, you can manually [track any Contributions](#) that should be allocated to that offline campaign, such as cash, cheques, etransfers etc.



Name	Type	URL	Campaign Group	Start Date	End Date	Goal	Selected Period	All-time
2022 GivingTuesday Campaign	Donation Form	🔗	GivingTuesday	November 29th, 2022	November 30th, 2022	\$15,000.00	\$3,425.00	\$3,425.00
A Taste of Spring 2023	Event			February 2nd, 2023		\$15,000.00		
Andy Test Form	Donation Form	🔗					\$3,057.00	\$3,057.00
Bottle Drive	Direct Mail Appeal		Holiday Campaign Group 2022	November 25th, 2021	February 11th, 2022	\$10,000.00	\$27,431.85	\$27,431.85
Building Expansion Campaign	Email Appeals			December 19th, 2022	April 30th, 2024		\$4,030.00	\$4,030.00

Campaign Groups

Campaign Groups can be used to bundle multiple Campaigns together to aid in your reporting.

For example, let's say you had a CanadaHelps **Events** page, a CanadaHelps **P2P** campaign page, and a related **offline campaign** through which you were accepting your cash/cheque (offline) contributions. Each of these forms will display as separate Campaigns in your DMS, although they are all associated with the same upcoming charity event. In order to report on the offline contributions alongside your CanadaHelps **Events** ticket contributions and **P2P** Campaign contributions, you may wish to group them under a **Campaign Group** with a related title.

Each DMS has *preset* Campaign Groups that you may wish to use: **Annual Giving**, **Special Events**, and **Third Party Events**, but you can add your own custom Campaign Groups through the **Administer Tab**.

Next, learn to [perform an Advanced Search](#) for a specific Campaign Group's contributions and [generate Contribution Reports and filtering by one or more Campaign Groups](#).

Funds

Funds allow you, or your donors, to allocate donation dollars to specific programs. **Funds indicate where the money is going to go.**

Once **Funds** are assigned to Contributions in the DMS, you will be able to perform Advanced Searches on **Contacts** and **Contributions**, create Contact **Groups**, and generate **Reports** filtered by **Funds** in the DMS.

There are two types of Funds in your DMS:

1. (DMS) Funds; and
2. CH Funds

(DMS) Funds

DMS Funds allow you to record where each donation should be allocated once received by your organization. You may receive donations with no specific fund designation. These can be tracked within your DMS' *General Fund*. By default (and as required by the Canada Revenue Agency), your DMS comes preloaded with a **General Fund** and an **In-Kind Fund**.

That said, if you receive donations that should be allocated to a specific initiative or program funding, as requested by your donors, you can also [add new Funds in the DMS](#) beyond the General and In-Kind Funds.

Note: General Ledger (GL) Accounts in the DMS arrange where donation dollars made to specific DMS Funds are being stored in your General Ledger and Balance Sheet. [Each DMS Fund must be associated with its own unique GL Account in the DMS.](#)

Once you have created a **DMS Fund**, you can manually :

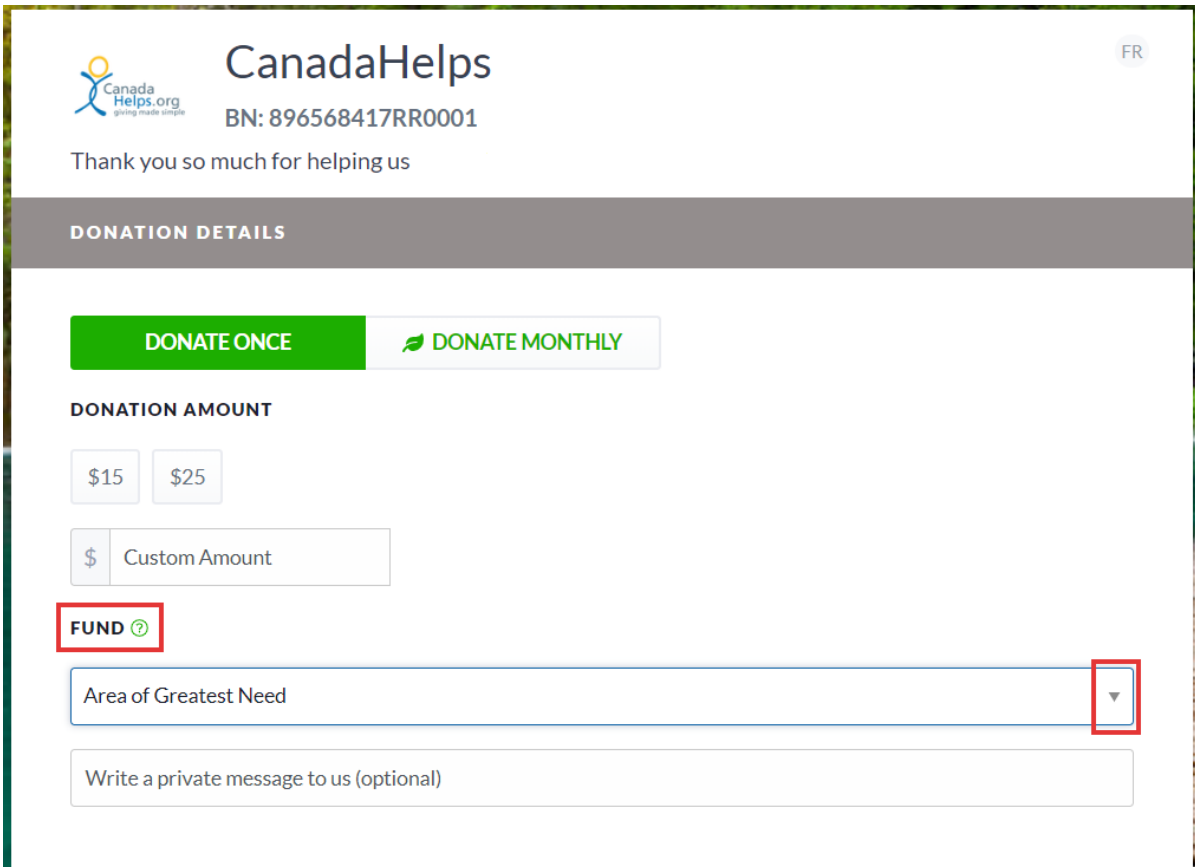
- [Track Contributions as allocated to that Fund](#)
- Associate any **Campaign** with a specific DMS Fund so that donations made to that **Campaign** will show as allocated to that **Fund**.

The screenshot shows the 'Wellness Avenue' DMS interface. The top navigation bar includes 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. A 'Settings | Help' menu and a 'DMSCA DMSCA' dropdown are also visible. The main content area is titled 'Campaigns' and shows a form for a 'Golf Tournament' campaign. The form includes a 'CAMPAIGN NAME' field with 'Golf Tournament' entered, a 'CAMPAIGN GROUP' dropdown set to 'Special Events', and a 'GOAL' field with '50,000.00'. A dropdown menu for selecting a DMS Fund is open, showing options: '2023', 'Community Outreach Fund', 'Fitness', 'General Fund', and 'In Kind'. The 'General Fund' option is highlighted with a red box. A 'Save' button and a 'Cancel' button are located at the top right of the form. A dark grey banner at the bottom of the form contains the text 'DMS Fund associated with a Campaign'.

Note: All In-Kind Contributions will be assigned to an In-Kind Fund in your DMS by default.

CanadaHelps (CH) Funds

You can create [CanadaHelps Funds](#) (also known as *CH Funds*) directly in your [CanadaHelps.org](#) charity account to allow your donors to choose where they would like their donation dollars to be directed to:



The screenshot shows the CanadaHelps.org donation interface. At the top left is the logo for CanadaHelps.org with the tagline 'giving made simple'. To the right of the logo, the text reads 'CanadaHelps' and 'BN: 896568417RR0001'. A 'FR' language selector is in the top right corner. Below the header, a message says 'Thank you so much for helping us'. A dark grey bar contains the text 'DONATION DETAILS'. Below this bar, there are two buttons: 'DONATE ONCE' (highlighted in green) and 'DONATE MONTHLY' (with a leaf icon). Underneath is the 'DONATION AMOUNT' section, which includes buttons for '\$15' and '\$25', and a 'Custom Amount' field with a dollar sign icon. A 'FUND' dropdown menu is highlighted with a red box; it currently shows 'Area of Greatest Need' and has a downward arrow icon on its right side, also highlighted with a red box. Below the dropdown is a text input field for 'Write a private message to us (optional)'.

To be able to see which **CanadaHelps Funds** your donors have selected from right within your DMS, you must make sure to [map your CanadaHelps Funds to your \(DMS\) Funds](#). This way, anytime a donor selects a specific **CanadaHelps Fund** when making their donation through CanadaHelps, their Contribution will be automatically allocated to the corresponding **(DMS) Fund** in your DMS.

Wellness Avenue | Dashboard | Contacts | **Contributions** | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

Search by contributor name or email

Actions | 0 Selected Records Only | All 1471 Records | All Contributions | Advanced Actions | Add Contribution

Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
<input type="checkbox"/> March 6th, 2023 11:50 AM	Jacob O'Connor	\$75.00	Mental Health Initiative		DMS Manual	Cheque	Completed		-
<input type="checkbox"/> March 6th, 2023 11:34 AM	Lucas Froese	\$1,000.00	General Fund	Golf Tournament	DMS Manual	Cheque	Completed	WELL00000928	✓
<input type="checkbox"/> March 6th, 2023 02:26 AM	Maya Karolina	\$1.23 (Recurring)	Fitness		DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed		-

DMS Fund

Opportunities

Opportunities in your DMS allow you to record and track the status of medium to long-term requests, fundraising opportunities, and prospects that might be outside of your day-to-day fundraising appeals, such as:

- **Grant applications,**
- **Major gifts,** and
- **Special projects.**

Wellness Avenue | Dashboard | Contacts | Contributions | **Opportunities** | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

Search by contact name or email

Actions | 0 Selected Records Only | All 22 Records | All Opportunities | Add Opportunity

Opportunity Name	Prospect	Opportunity Status	Opportunity Type	Application Deadline	Opportunity Amount	Amount Received	Opportunity Report Due
Youth donation 5k	A. Amadu	Discovery	Donation		\$5,000.00	\$5,000.00	
Possible In Kind Donation of Old Computer	A. L. Kostenko	In Progress	Gifts In Kind		\$250.00		
Accessibility Grant	Accessibility Foundation	In Progress	Grant	December 30th, 2022	\$250,000.00	\$100,000.00	March 31st, 2023
Head Office Grant 2022	Accessibility Foundation	In Progress	Grant		\$50,000.00		
Pledge 2023	Accessibility Foundation	Follow up required	Pledge		\$10,000.00	\$5,000.00	

Opportunities Tab

Once **Opportunities** are created in the DMS, you will be able to perform Advanced Searches on **Contacts** and **Contributions**, create Contact **Groups**, and generate **Opportunity Reports**.

Other Relevant Fundraising Fields in the DMS

Many of your fundraising efforts can be tracked through the DMS using existing Contribution **Fields**, including Campaign, Fund, and additional Contribution/Dedication details:

Cheque
Completed

^ **Contribution Details**

EXCLUDE FROM TAX RECEIPTING ?

CONTRIBUTION RECEIPTED

RECEIPT NUMBER

WELL00000053

CONTRIBUTION NOTE

MARK CONTRIBUTION AS RECURRING

^ **Dedication Information**

Do you want to dedicate it to somebody ?

IN MEMORY OF *

Yes No

IN HONOUR OF *

Yes No

NAME OF HONOREE

MESSAGE

^ **Additional Details**

ADVANTAGE AMOUNT

0.00

Non-deductible portion of this contribution.

ADVANTAGE DESCRIPTION

FEE AMOUNT

0.00

Processing fee for this transaction (if applicable).

THANK-YOU DATE

04/26/2022

Date that a thank-you message was sent to the contributor.

Once **Fields** are assigned to Contributions in the DMS, you will be able to perform Advanced Searches on **Contacts** and **Contributions**, create Contact **Groups**, and generate **Reports** based on these **Fields** in the DMS.

Contribution Fields

- **Excluded from Tax Receipting:** if the Contribution is not eligible for a Tax Receipt (any source).
- **Contribution Received:** if a Tax Receipt for this Contribution has already been issued externally (i.e. via CanadaHelps or a previous system). For eligible, manually-entered Contributions, the DMS Receipt number will display in the Receipt number field once the eligible Receipt is used.
- **Contribution Note:** used for internal purposes only, to track details that fall outside these dedicated fields.
- **Recurring Contribution:** mark if a donation is recurring.
- **In Memory Of:** if the donation is in memory of something and/or someone.
- **In Honour Of:** if the donation is in honour of something and/or someone.
- **Thanked:** whether or not a Contribution has been thanked

