Assigning CH Funds to Funds in your DMS

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Donor Management System

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DMS Funds vs. CH Funds

Funds

Funds in your **DMS allow you to record where all donations** (whether made **online** through CanadaHelps.org, or made **offline** and recorded in your DMS) **are allocated internally** within your organization. As required by the Canada Revenue Agency, by default, your DMS comes preconfigured with a **General Fund** and an **In-Kind Fund**.

If you receive offline gifts (i.e., cash, cheques) with no specific fund designation requested by the donor, these can be tracked through your *DMS' General Fund*.

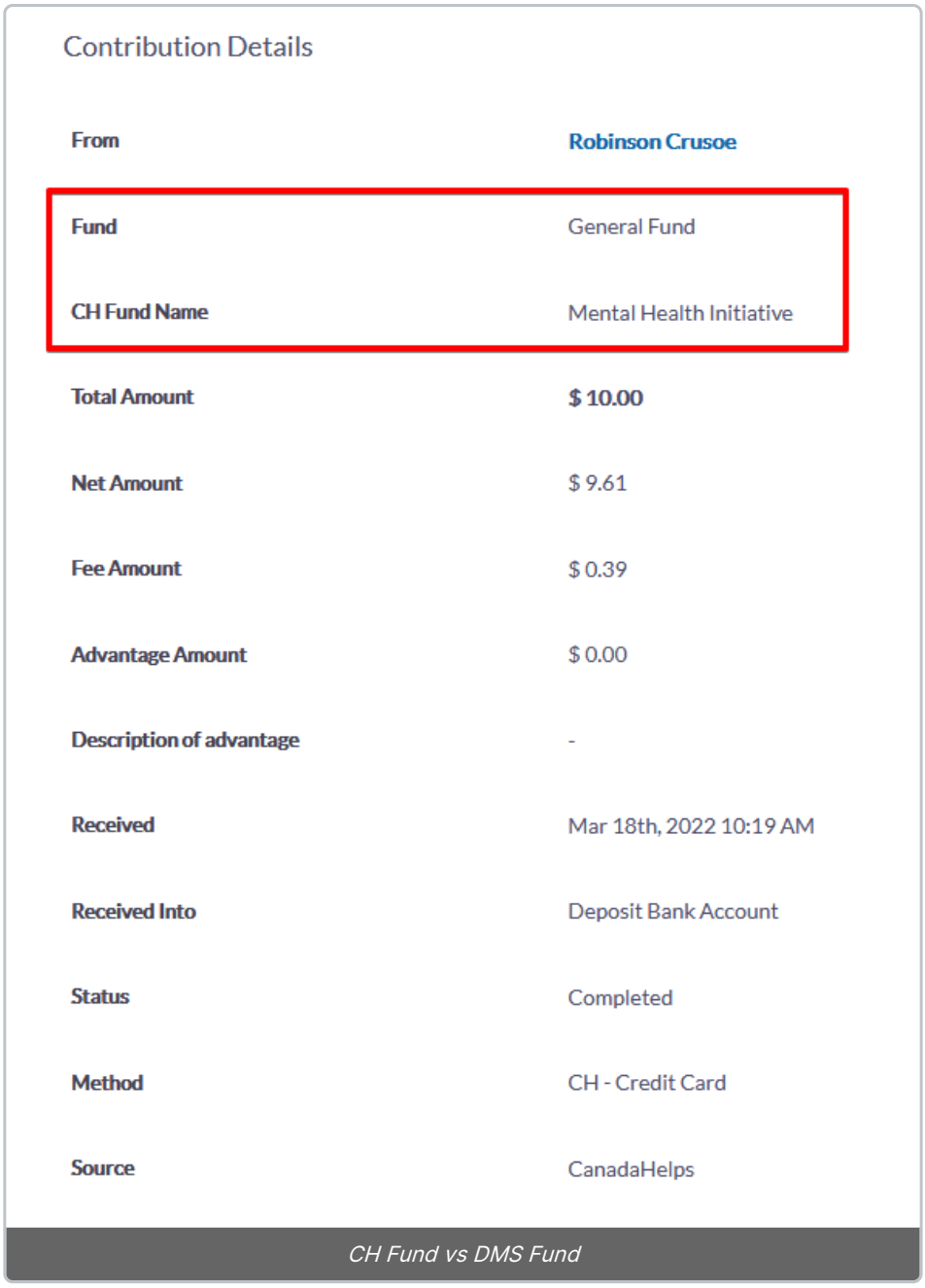
However, you may also receive offline donations (i.e., cash, cheques) where donors requested they be allocated to a specific initiative or program funding. In this case, you can then add new Funds in your DMS so that you can designate these offline contributions to this specific (DMS) Fund.

CH Funds

On the other hand, **CH Funds** are **sourced from your CanadaHelps donation forms and fundraising tools**. As a reminder, you can modify which CH Funds are visible to your donors when making a donation.

All CH Funds must be mapped against a DMS Fund. By default, your CH Funds will be assigned to either the *General* Fund or *Unassigned* Fund in your DMS. However, you can re-assign a CH Fund to a matching DMS Fund.

For example, here, the *Mental Health Initiative* CH Fund is mapped to the *General* DMS Fund by default. But, if you prefer, you can create matching DMS Funds for all your CH Funds and map them against one another (see next section). This will help you easily report on your CanadaHelps donations together with your offline (i.e., manually entered) donations.

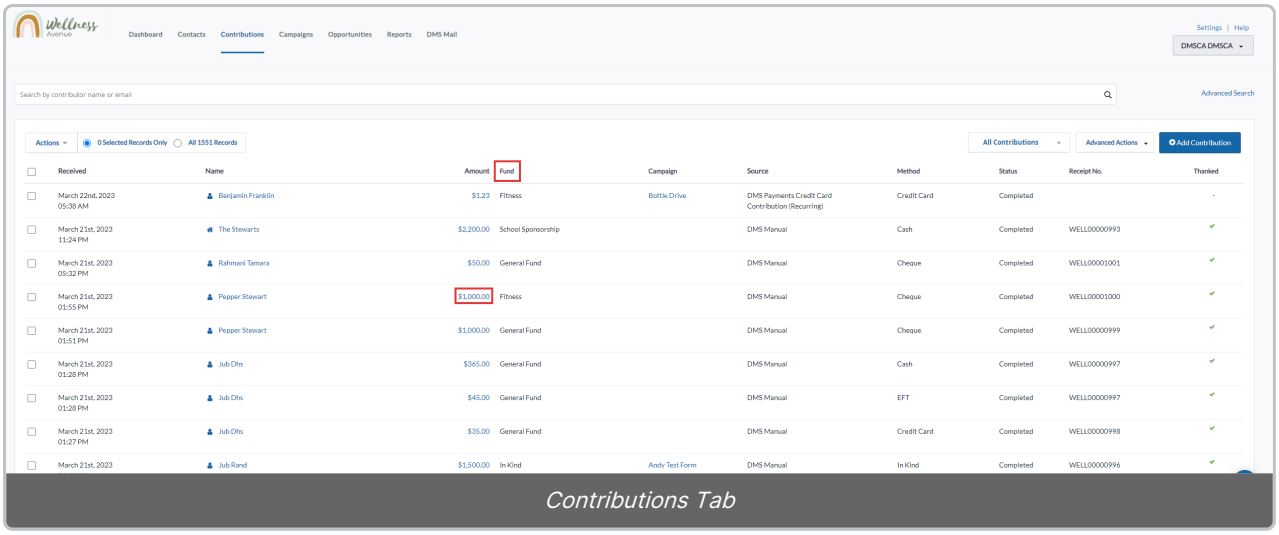


CH Fund vs DMS Fund

Note: multiple CH Funds (e.g., *Helping Mothers CH Fund* and *Neonatal Fund* CH Fund) can be allocated to a single DMS Fund (e.g., *General* Fund).

However, a single CH Fund (e.g. *Helping Mothers CH Fund)* cannot be allocated to multiple DMS Funds at once (e.g. *General* Fund and *In-Kind* Fund).

Lastly, keep in mind that **your main Contributions tab shows only DMS Funds**. However, simply select a Contribution amount to see both the DMS Fund and the corresponding CH Fund.



Contributions Tab

Need more information on DMS Funds vs. CH Funds? Watch a short video tutorial below.

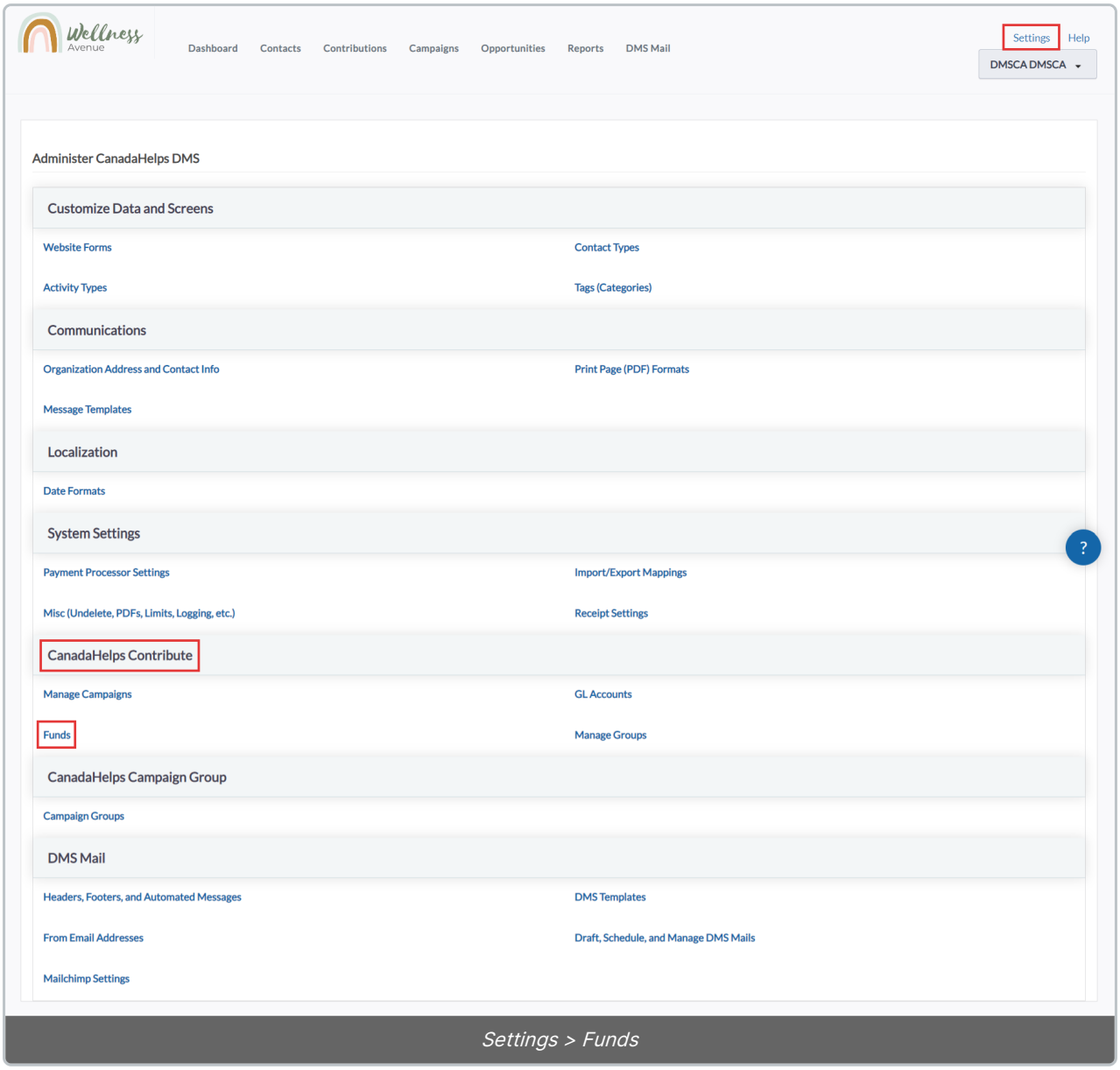
Assigning CH Funds to Funds in your DMS

As a reminder, by default, your **CH Funds will be assigned to** your **General Fund** or **Unassigned Fund** in your DMS. But, you can re-assign a CH Fund to a matching DMS Fund.

For example, let's assign our *Peace Initiative* **CH Fund** to a matching *Peace Initiative* **DMS Fund**.

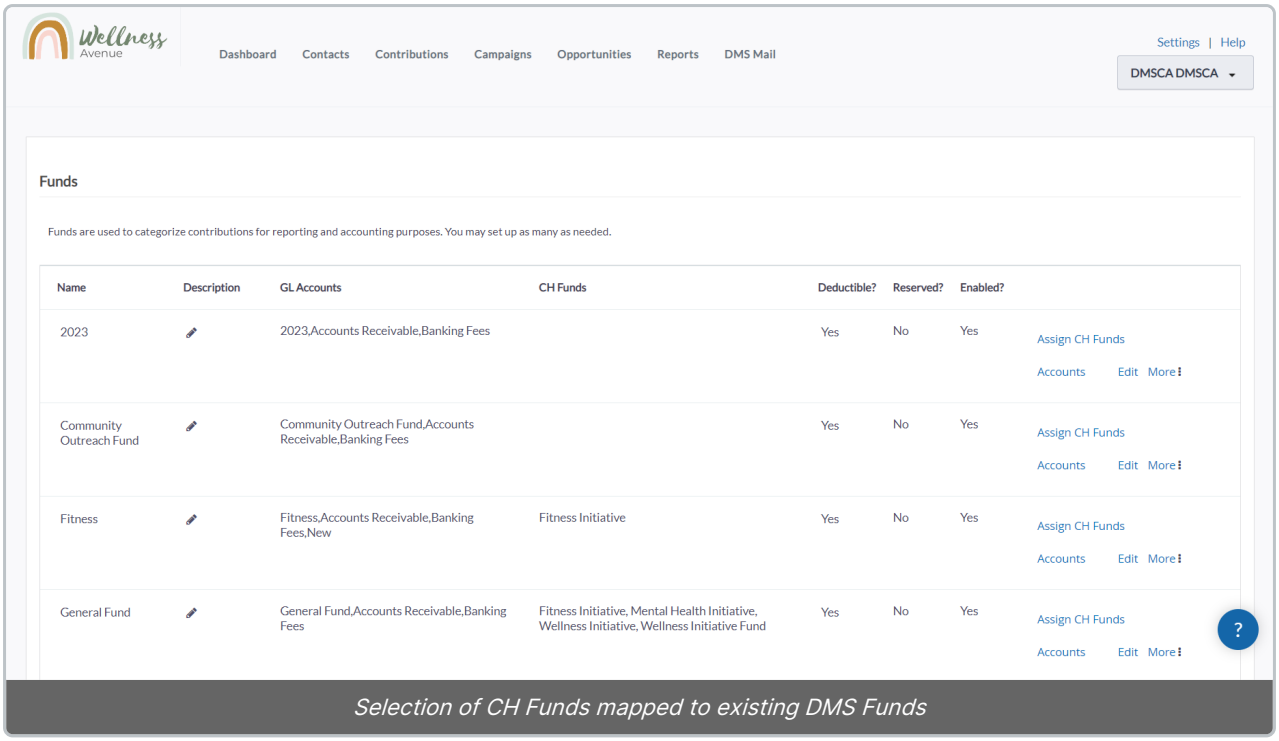
1. Visit your **Administrative Settings**.

2. Under ***CanadaHelps Contribute***, select ***Funds.***



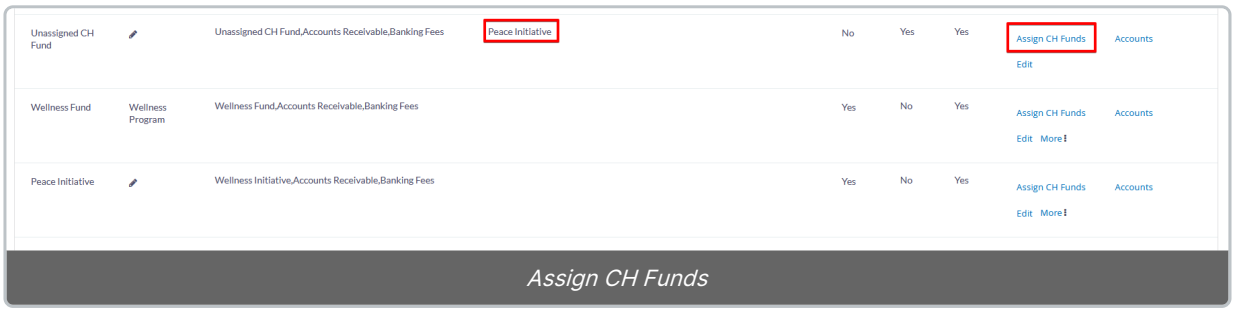
Settings > Funds

Here, you can view or edit **your existing CH Funds and DMS Funds**.



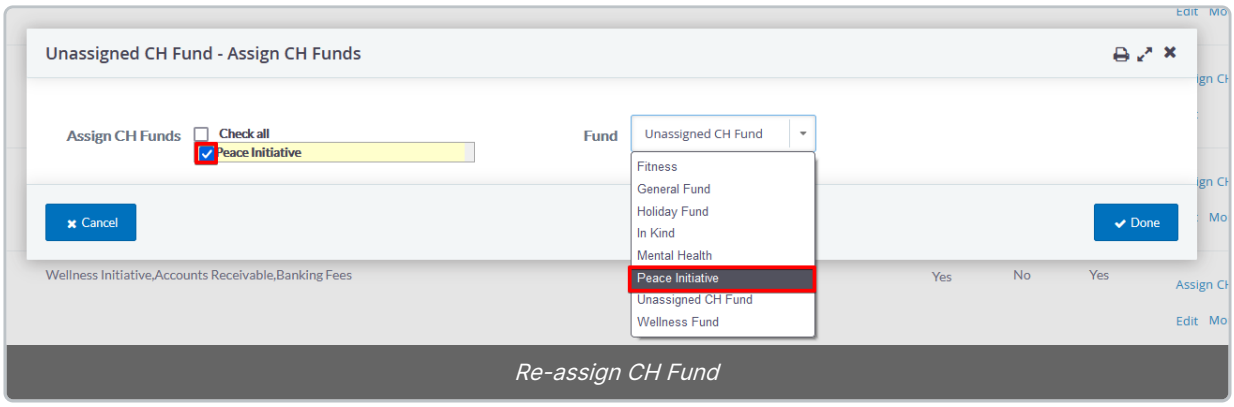
Selection of CH Funds mapped to existing DMS Funds

3. To re-assign a CH Fund, select ***Assign CH Funds*** next to the Fund that the CH Fund is **currently** mapped to. In this case, the Peace Initiative CH Fund is currently *Unassigned*



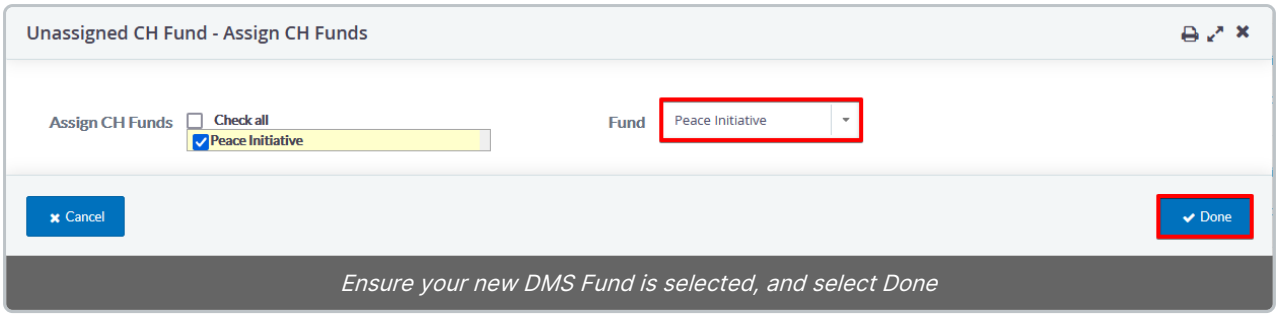
Assign CH Funds

4. Select the **CH Fund you wish to reassign** and **which DMS Fund** it should be assigned to



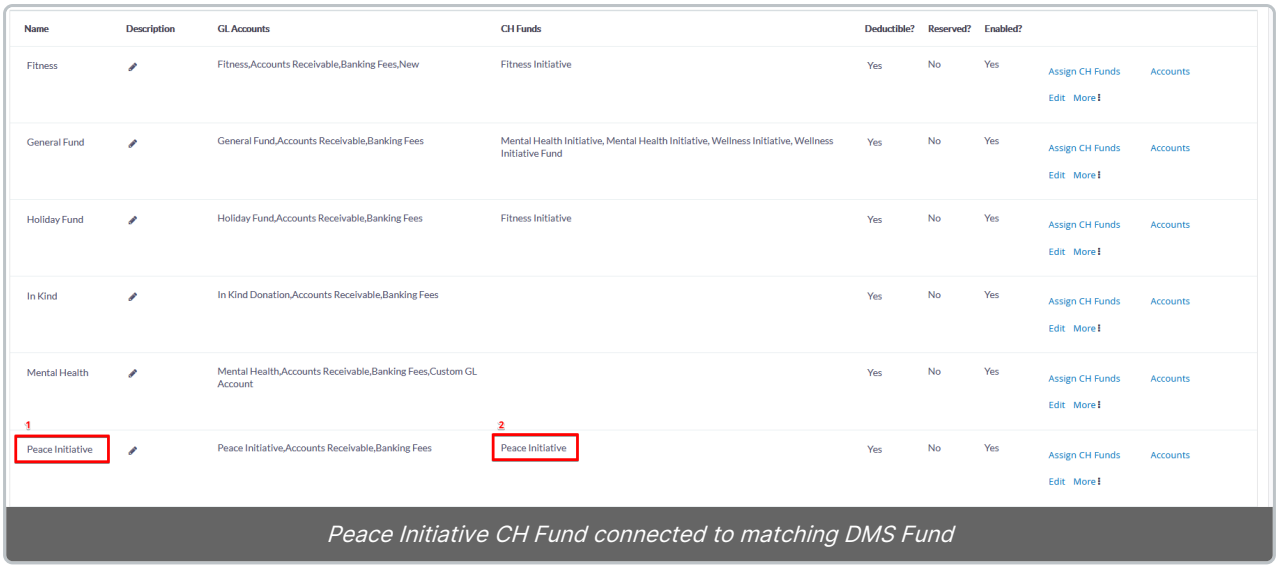
Re-assign CH Fund

5. When ready, select ***Done*** to re-assign the CH Funds to your desired (DMS) Fund.



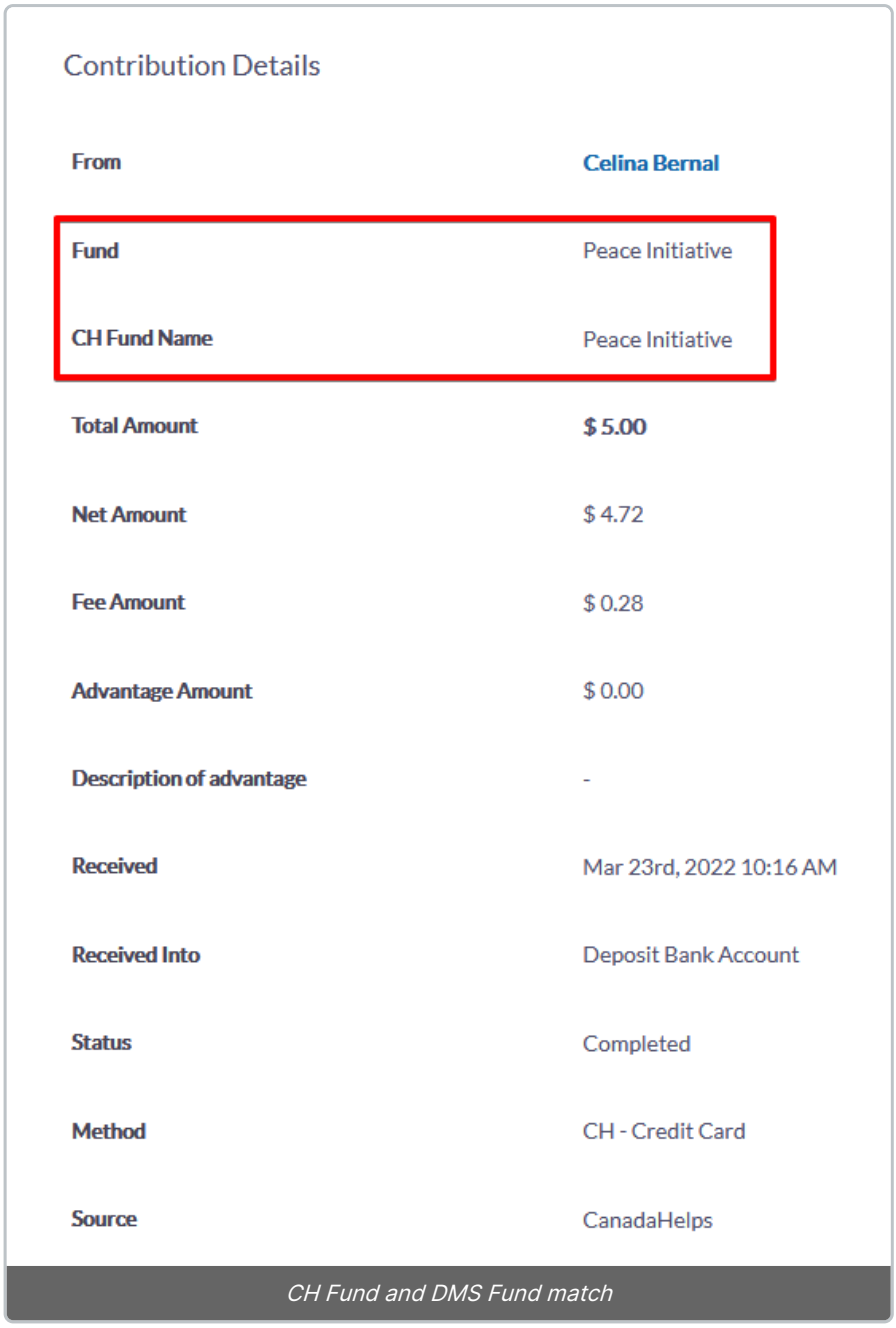
Ensure your new DMS Fund is selected, and select Done

6. Once saved, the **CH Fund (2)** will be mapped against the chosen **DMS Fund (1)**



Peace Initiative CH Fund connected to matching DMS Fund

7. Now, in the Contribution details section for any donation designated to the *Peace Initiative* CH Fund, you'll see that the corresponding (DMS) Fund is now the *Peace Initiative* Fund:



CH Fund and DMS Fund match

Note: Please allow for up to a day for your DMS to transfer this CH Fund designation to your new DMS Fund, as it depends on the volume of records that are updating.

What's Next?

Now that you've mapped your CH Funds against your (DMS) Funds, learn how to generate reports on DMS Funds or CH Funds. Or, check out how to use the Advanced Search for Contributions to filer donations by their DMS Fund or CH Fund.