Assigning CH Funds to Funds in your DMS

Last Modified on 07/22/2025 3:31 pm EDT

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 modifywhich 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 <u>next section</u>). This will help you easily report on your CanadaHelps donations together with your offline (i.e., manually entered) donations.

Contribution Details	
From	Robinson Crusoe
Fund	General Fund
CH Fund Name	Mental Health Initiative
Total Amount	\$ 10.00
Net Amount	\$ 9.61
Fee Amount	\$ 0.39
Advantage Amount	\$ 0.00
Description of advantage	-
Received	Mar 18th, 2022 10:19 AM
Received Into	Deposit Bank Account
Status	Completed
Method	CH - Credit Card
Source	CanadaHelps
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.

	Vellness Dashboard Conta	cts Contributions Campaigns Opportunities Reports DMS H	Mall							Settings Help DMSCA.DMSCA +
Search by	contributor name or email								٩	Advanced Search
Acti	ons +	1551 Records						All Contributions +	Advanced Actions 🔹	Add Contribution
	Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
	March 22nd, 2023 05:38 AM	8 Benjamin Franklin	\$1.23	Fitness	Bottle Drive	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed		
	March 21st, 2023 11:24 PM	# The Stewarts	\$2,200.00	School Sponsorship		DMS Manual	Cash	Completed	WELL00000993	~
	March 21st, 2023 05:32 PM	🛔 Rahmani Tamara	\$50.00	General Fund		DMS Manual	Cheque	Completed	WELL00001001	*
	March 21st, 2023 01:55 PM	Papper Stewart	\$1,000.00	Fitness		DMS Manual	Cheque	Completed	WELL00001000	*
	March 21st, 2023 01:51 PM	Pepper Stewart	\$1,000.00	General Fund		DMS Manual	Cheque	Completed	WELL00000999	*
	March 21st, 2023 01:28 PM	🋔 Jub Dhs	\$365.00	General Fund		DMS Manual	Cash	Completed	WELL00000997	*
	March 21st, 2023 01:28 PM	🛔 Jub Dhs	\$45.00	General Fund		DMS Manual	EFT	Completed	WELL00000997	*
	March 21st, 2023 01:27 PM	🛔 Jub Dhs	\$35.00	General Fund		DMS Manual	Credit Card	Completed	WELL00000998	*
0	March 21st, 2023	🛔 Jub Rand	\$1,500.00	In Kind	Andy Test Form	DMS Manual	In Kind	Completed	WELL00000996	*
	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.

Avenue Dashboard Contacts Contributions C	ampaigns Opportunities Reports DMS Mail	DMSCA DMSCA
Iminister CanadaHelps DMS		
Customize Data and Screens		
Website Forms	Contact Types	
Activity Types	Tags (Categories)	
Communications		
Organization Address and Contact Info	Print Page (PDF) Formats	
Message Templates		
Localization		
Date Formats		
System Settings		
Payment Processor Settings	Import/Export Mappings	
Misc (Undelete, PDFs, Limits, Logging, etc.)	Receipt Settings	
CanadaHelps Contribute		
Vanage Campaigns	GLAccounts	
Funds	Manage Groups	
CanadaHelps Campaign Group		
Campaign Groups		
DMS Mail		
Headers, Footers, and Automated Messages	DMS Templates	
From Email Addresses	Draft, Schedule, and Manage DMS Mails	
Mailchimp Settings		

Here, you can view or edityour existing CH Funds and DMS Funds.

								DMSCA DMSC
ds								
nds are used to categ	orize contributions f	or reporting and accounting purposes. You may set up	as many as needed.					
lame	Description	GL Accounts	CH Funds	Deductible?	Reserved?	Enabled?		
2023	ø	2023,Accounts Receivable,Banking Fees		Yes	No	Yes	Assign CH Fun	nds
							Accounts	Edit More
Community Outreach Fund	ø	Community Outreach Fund, Accounts Receivable, Banking Fees		Yes	No	Yes	Assign CH Fun	nds
							Accounts	Edit More
Fitness	ø	Fitness,Accounts Receivable,Banking Fees,New	Fitness Initiative	Yes	No	Yes	Assign CH Fun	nds
							Accounts	Edit More
General Fund		General Fund,Accounts Receivable,Banking Fees	Fitness Initiative, Mental Health Initiative, Wellness Initiative, Wellness Initiative Fund	Yes	No	Yes	Assign CH Fun	nds
								Edit Manual

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*

Unassigned CH Fund	1	Unassigned CH Fund, Accounts Receivable, Banking Fees Peace Ini	itative	No	Yes	Yes	Assign CH Funds Edit	Accounts
Wellness Fund	Wellness Program	Wellness Fund.Accounts Receivable,Banking Fees		Yes	No	Yes	Assign CH Funds	Accounts
Peace Initiative	1	Wellness Initiative,Accounts Receivable,Banking Fees		Yes	No	Yes	Assign CH Funds Edit More I	Accounts
Assign CH Funds								

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

Unassigned CH Fund - Assign CH Funds	
Assign CH Funds Check all Fund	Inassigned CH Fund Fitness General Fund Holiday Fund In Kind Mental Health
Wellness Initiative,Accounts Receivable,Banking Fees <i>Re-assign</i>	Peace Initiative Yes No Yes Assign C Unassigned CH Fund Wellness Fund Edit Mo CH Fund

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

Unassigned CH Fund - Assign CH Funds		⊖
Assign CH Funds Check all Peace Initiative	Fund Peace Initiative +	
X Cancel		✔ Done
Ensure your new D	MS Fund is selected, and select Done	

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

Name	Description	GL Accounts	CH Funds	Deductible?	Reserved?	Enabled?		
Fitness	1	Fitness,Accounts Receivable,Banking Fees,New	Fitness Initiative	Yes	No	Yes	Assign CH Funds Edit More I	Accounts
General Fund	1	General Fund,Accounts Receivable,Banking Fees	Mental Health Initiative, Mental Health Initiative, Wellness Initiative, Wellness Initiative Fund	Yes	No	Yes	Assign CH Funds Edit More I	Accounts
Holiday Fund	1	Holiday Fund,Accounts Receivable,Banking Fees	Fitness Initiative	Yes	No	Yes	Assign CH Funds	Accounts
In Kind	1	In Kind Donation, Accounts Receivable, Banking Fees		Yes	No	Yes	Assign CH Funds Edit More I	Accounts
Mental Health	1	Mental Health,Accounts Receivable,Banking Fees,Custom GL Account		Yes	No	Yes	Assign CH Funds	Accounts
• Peace Initiative	1	Peace Initiative, Accounts Receivable, Banking Fees	Peace Initiative	Yes	No	Yes	Assign CH Funds Edit More I	Accounts
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:

Contribution Details							
From	Celina Bernal						
Fund	Peace Initiative						
CH Fund Name	Peace Initiative						
Total Amount	\$ 5.00						
Net Amount	\$ 4.72						
Fee Amount	\$ 0.28						
Advantage Amount	\$ 0.00						
Description of advantage	-						
Received	Mar 23rd, 2022 10:16 AM						
Received Into	Deposit Bank Account						
Status	Completed						
Method	CH - Credit Card						
Source	CanadaHelps						
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 togenerate 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.