

How do I report on Funds from CanadaHelps contributions?

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Donor Management System

When donors give through CanadaHelps.org, you are able to:

1. Allow donors to choose a Fund to direct where they would like their donation dollars to go, or
2. Assign all of the donations from a specific Campaign to a default Fund to know where to direct those specific donation dollars.

In this article, we will review how to map your CanadaHelps Funds to your DMS Funds in order to generate Fund Reports in your DMS.

Important: You will not be able to edit CanadaHelps Contributions in your DMS once they have been made, which means that **you will need to map both the CH Funds and DMS Funds in advance** to ensure that Contributions are being directed to the correct Fund in your DMS

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If you would like to...

Have your donor to choose from a list of CanadaHelps Funds when making their donation

1. Create a Fund in your CanadaHelps account, making it visible to your Contacts for selection
2. [Create a matching DMS Fund in your DMS account](#)
3. [Assign your CanadaHelps Funds to your DMS Funds](#) in the DMS
4. When a donor selects a CanadaHelps Fund when making their donation through CanadaHelps.org, the donation will automatically be assigned to the DMS Fund which is associated with that CanadaHelps Fund

Assign a specific CanadaHelps Fund to all donations coming from a specific Campaign

1. Create a Fund in your CanadaHelps account and do not make it visible to your donors for selection.
 2. Assign your CanadaHelps Funds to your Campaigns in CanadaHelps.org (Donation Forms, P2P, Events, etc.).
 3. [Create a matching DMS Fund in your DMS account](#)
 4. [Assign your CanadaHelps Funds to your DMS Funds](#) in the DMS
 5. All Contributions made to this Campaign will all be assigned to the Fund you have associated it with
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Generating a DMS Report on your Funds

Once your Funds are set up and associated with either [CanadaHelps Funds](#), or [specific Campaigns](#), you can generate Contribution Reports based on CanadaHelps or DMS Funds in the DMS.

--> [Learn more about Reports](#)

- If you would like to see a summary of which CanadaHelps Funds your Contacts have selected when making their donation, use the **Contribution History by CH Fund (Summary)** Report
- If you would like to see which of the DMS Funds were associated with which Contribution, you can use any of the **Contribution History by Fund** Reports.