

What Does the DMS do?

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Donor Management System

The Donor Management System (DMS) is a system designed to help you better understand your donors so you can make **informed decisions**, **cultivate relationships**, and, ultimately, **raise more money** to fund your mission.

It can also help you and your team save countless hours by automating key processes such as tax receipting and emailing, all while giving you a **360-degree view** of your donors, constituents, volunteers, and more.

Organize your data

- Access donor, donation, and campaign data from CanadaHelps, which is automatically updated for you on a daily basis.
- Import your historical donor data (i.e., donors and gifts outside of CanadaHelps) for a complete overview of your fundraising efforts.
- Easily track your ongoing donor interactions and activities in one place, for consistent donor management across your team.
- Help ensure that existing relationships and valuable donor information aren't lost with staff changes.

Better understand your supporters

- Access preset reports by campaign, campaign groups, funds, receipts and more to better understand your donors.
- Use dozens of filters to create reports that are highly customized for your organization's different stakeholders.

- Pin the most relevant reports to your Homepage for easy, day-to-day access.

Streamline administration

- Easily process one-time and recurring donations taken over the phone, in person, or from your direct mail response with our built-in payment tool.
- Issue tax receipts individually or in bulk, and send highly customized thank you messages in real-time, or on your schedule.
- Communicate effectively with your donors using our built-in email tool, or our MailChimp integration.

Identify opportunities for growth

- Use the Groups and Smart Groups feature to easily identify key donor segments.
- Leverage the Opportunities page to track and manage grant applications, donation prospects and more.

---> [Click to learn more about who can use the DMS!](#)
