

# Who Uses the DMS?

Last Modified on 12/14/2022 2:02 pm EST

## Donor Management System

There are many roles in your charity can reap the benefits of the Donor Management System. And we know that oftentimes, charities are small but mighty teams of individuals wearing many different hats!

That said, we've included below a list of a few typical charity administrators that can take advantage of the DMS to perform some common, day-to-day tasks.

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## Executive Director



It's important for Executive Directors to provide regular updates on fundraising activities to their charity boards. The DMS can help you as an Executive to keep track of donations, prospective donors, and grant prospects, and makes preparing for a board meeting that much easier.

With the DMS, you can easily pull dozens of highly [customized reports](#): such as reports by different revenue sources, reports on donor statistics, and comparative reports based on calendar/fiscal year. You can also [pin the most relevant reports](#) to your Home page for quick and easy access.

You can even add your Board Treasurer [as a user](#) so they'll always have access to the latest fundraising and revenue reports.

## Fundraising Staff



As a fundraising professional, you'll likely steward donors a little differently depending on giving level, frequency, or donation source. And the first step is to identify and bucket these donors using the [Advanced Search](#) or [Groups/Smart Groups](#) functions. You can then tailor your communications and fundraising appeals in a more meaningful way.

Also, measure the progress of your online and offline fundraising [campaigns](#) in real time, and when they're done, easily [issue tax receipts](#) and [thank](#) your donors with the click of a button. Plus, track and manage grant applications, major gift prospects, and other important [opportunities](#).

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## Finance Team



With the DMS, your team can download an array of useful [reports](#) showing year-over-year trends by source, helping you plan programming spends and strategic infrastructure investments so that you're less likely to run into cash flow challenges.

And, easily export pre-made DMS reports for a seamless import into your bookkeeping software, such as [Quickbooks Online](#). Plus, use the DMS to process one-time or recurring [credit card and EFT donations](#) and issue CRA-compliant [tax receipts](#) with just one click.

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## Marketing/Communications



A key function in marketing is crafting fundraising appeals and other communications tailored to specific segments of donors and constituents who've interacted with your charity. With the DMS, you can easily identify these key donor segments within [Groups and Smart Groups](#), or [tag Contacts](#) as volunteers, program participants, members, former staff and more for even greater stewardship opportunities.

Then, leverage the [built-in bulk email tool](#) (DMS Mail) to craft beautifully branded newsletters, announcements, email fundraising appeals, and any other mass communications. Or, if your charity uses Mailchimp, take advantage of the DMS' [Mailchimp integration](#).

This list is definitely not exhaustive, and these are just some of the many ways that your team can take advantage of the DMS to save time and raise more.

**So, ready to [get started](#)?**