

DMS Login and Users

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Donor Management System

Your CanadaHelps account and the Donor Management System go hand in hand! Learn how to easily jump between your DMS and your CanadaHelps charity account.

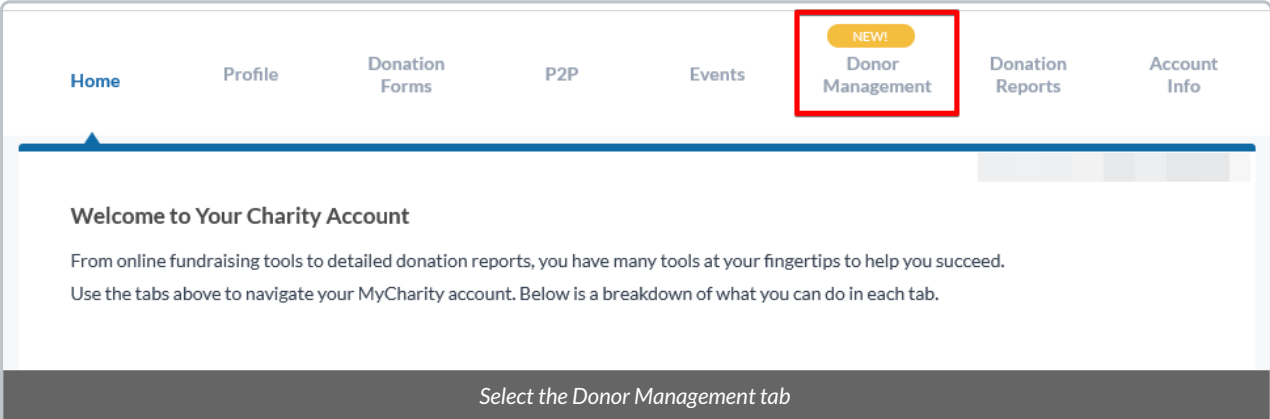
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Logging Into Your DMS

To access to your DMS, you'll first need to either be a primary or secondary administrator in your [CanadaHelps.org](#) charity account.

1. [Sign in](#) to your **Charity account** on CanadaHelps.org
2. Select the **Donor Management** tab



The screenshot displays the top navigation bar of the CanadaHelps.org user interface. The navigation tabs are: Home, Profile, Donation Forms, P2P, Events, Donor Management, Donation Reports, and Account Info. The 'Donor Management' tab is highlighted with a red rectangular box and a yellow 'NEW!' badge above it. Below the navigation bar, the main content area shows a 'Welcome to Your Charity Account' message. The message text reads: 'From online fundraising tools to detailed donation reports, you have many tools at your fingertips to help you succeed. Use the tabs above to navigate your MyCharity account. Below is a breakdown of what you can do in each tab.' At the bottom of the screenshot, a dark grey banner contains the text: 'Select the Donor Management tab'.

3. Select **Access your DMS** to be taken directly to your DMS.

The screenshot shows a navigation menu with the following items: Home, Profile, Donation Forms, P2P, Events, Donor Management (highlighted with a 'NEW!' badge), Donation Reports, and Account Info. Below the menu, there is a section for the Donor Management System (DMS) with the following text: "Cultivate and steward your donors with the all-new CanadaHelps Donor Management System. Everything you need to know about your donors, improve your fundraising and foster long-term donor loyalty." A blue button labeled "Access Your DMS" is highlighted with a red box. Below the button is a link: "Learn more about the DMS". At the bottom of the screenshot, there is a dark grey bar with the text "Access your DMS".

Don't have access to your CanadaHelps.org charity account yet? Don't worry!

Just ask the main administrator of your charity's CanadaHelps account to follow the instructions in the section below.

Managing DMS Users

All of the administrators (also known as *linked users*) of your CanadaHelps charity account will have automatic access to your DMS.

To add or manage your existing DMS Administrators, you'll need to do this directly in your CanadaHelps.org charity account following the steps below.

Reminder: Only the **main administrator** of the CanadaHelps.org account can add/remove an unlimited amount of secondary administrators (linked users).

1. [Login](#) to your **Charity Account**.
2. Click on **Account Info** and then on **Other Charity Administrators**.
3. Fill out the contact details of your desired linked user and click **Go**.

Home Profile Donation Forms P2P Events Donation Reports Funds **Account Info**

Main Charity Administrators **Other Charity Administrators** Account Settings Email Opt-In

Linked users: John Smith (johnsmith@charity.org) [Unlink](#)

Link other users:

First Name:

Last Name:

Email: **GO**

Add other Charity Administrators to your CanadaHelps.org charity account

Note: This person will receive an email notifying them of their addition to the Charity account, along with a link to reset their password (i.e., to select a password).

4. You'll then be able to login to your DMS by following the steps in the first section (above).

Resetting Your Password

To change your DMS password anytime, check out [these instructions](#).