Admin Starter Guide for DMS

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Welcome!
An Introduction to DMS

Welcome to the CanadaHelps Donor Management System Admin Starter Guide!

Whether this is your charity's first donor management system or you have experience with other CRMs or databases, we're here to help you get acquainted with the tools and features available in our DMS.

What is DMS ?

CanadaHelps DMS is a system designed to help you keep all of your fundraising data in one place and better understand your donors to make ***informed decisions, cultivate relationships****, and, ultimately,* ***raise more money*** *to fund your mission.*

The DMS allows you to issue CRA-compliant tax receipts, thank donors, generate customized reports, view donor statistics, and track your fundraising progress in real-time — all with just a click. It also helps you create tailored fundraising appeals by segmenting donors into groups and tagging contacts like volunteers or members. With the built-in DMS Mail tool, you can easily send branded newsletters, announcements, and email appeals for effective donor engagement—and that's not all! There's even more to explore as you dive deeper into the platform.

Navigating the Essentials: Main Tabs

Dashboard

Every time you log into the DMS from your CanadaHelps charity account, you'll land on the Dashboard tab. The Dashboard can be customized for each unique DMS user and gives you an overview of your data at a glance.

Dashlets

Dashlets are mini-reports or widgets that contain insights about your Contacts, Contributions and Activities. There are several default Dashlets available for you, however we do encourage you to build your own customized Dashlets using the Reports tab.

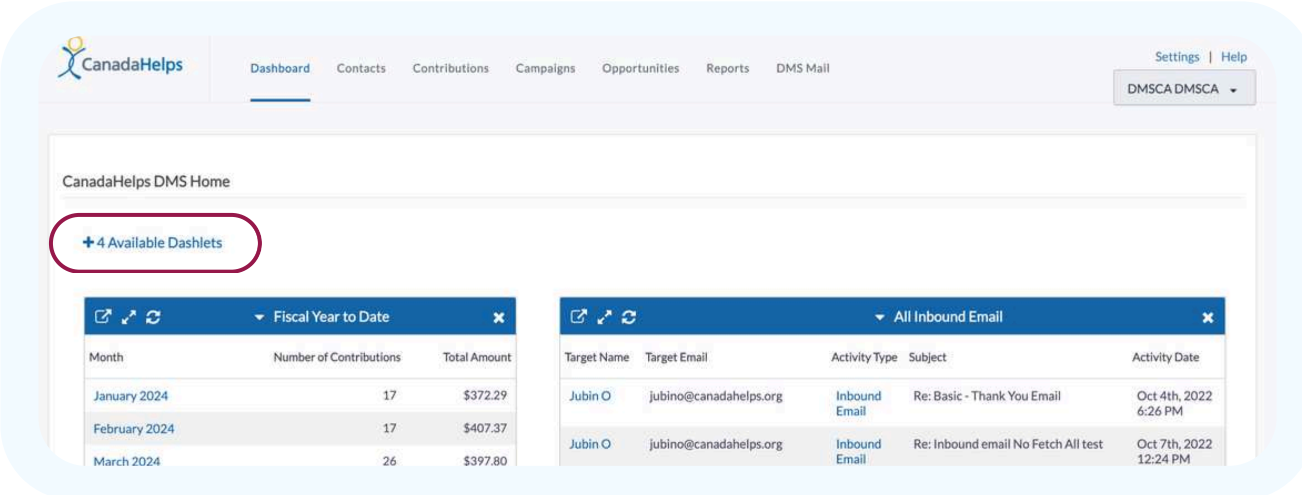
Configuring Your Dashlets

After logging in, you'll see a few Standard Dashlets and Charts:

Latest Contributions: Your Top 10 Contributions listed in your DMS.

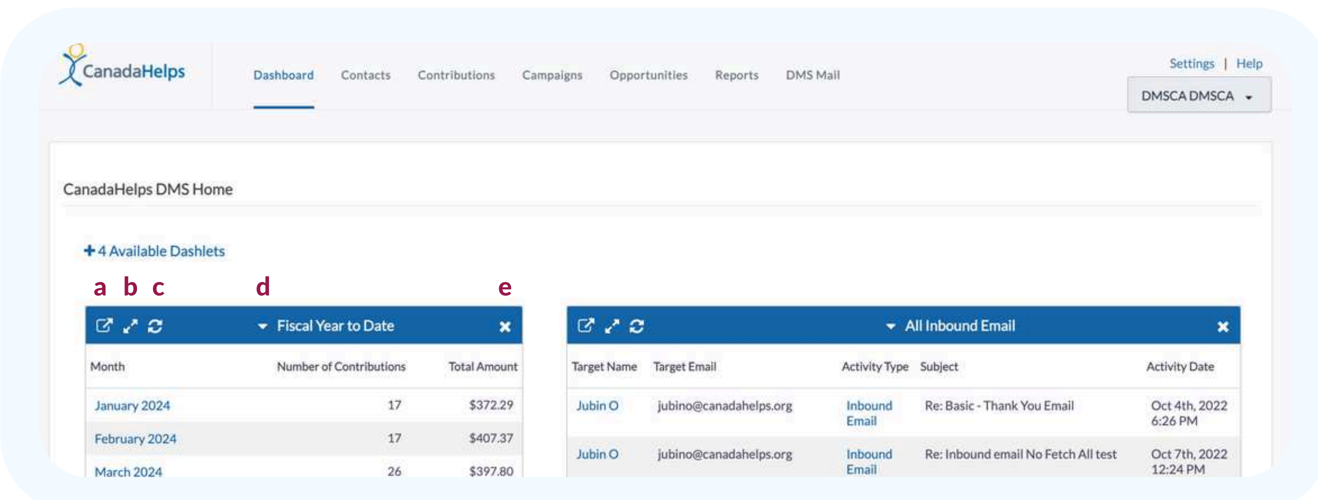
Activities: Your user’s latest scheduled Activities. This does not include Contributions or emails.

You can also see a list of **Available Dashlets** to add to your Home page:



To display a dashlet on your Dashboard, simply drag your desired dashlet from the list into the Left or Right Column boxes. Once satisfied with the position of your Dashlets, your dashboard will be automatically saved.

The DMS allows you to manage all of your Dashlets with a variety of actions located at the top of each Dashlet.



a) See the corresponding Report for that Dashlet.
b) Expand the Dashlet to a pop-up, if you'd like to see more than 10 records at once.
c) Refresh the data displayed on the Dashlet.
d) Retract the Dashlet for a more compact view in your dashboard.
e) Hide the Dashlet from your dashboard

You can also **add a custom report to your Dashboard**. **Check out this article for in-depth guidance.**

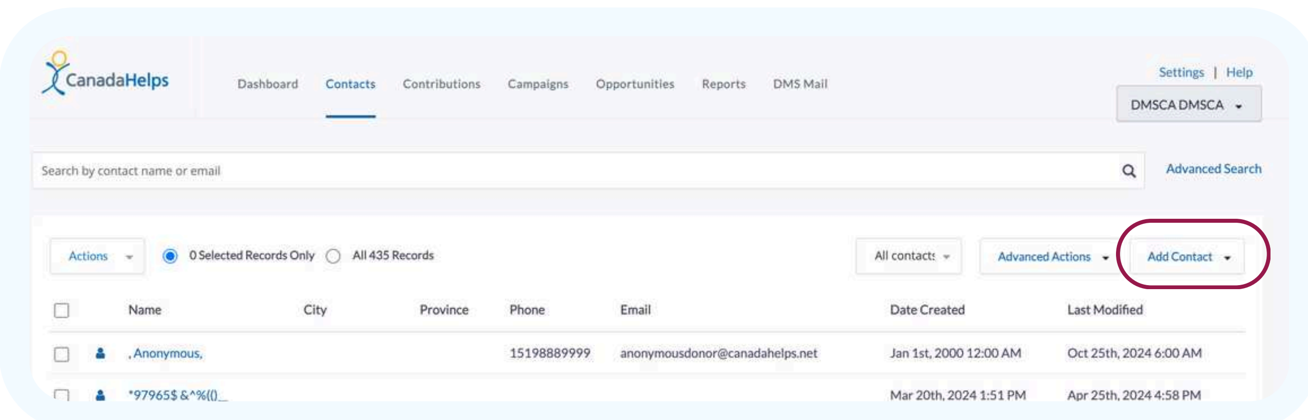
Contacts

The **Contacts** tab in your main menu presents a list of every Contact record in your DMS with basic information about each Contact.

The Search bar across the top of the page allows you to search for contacts by name or email.

Contacts are sorted alphabetically by first name or organization name. **To access a Contact Profile**, click on the name of the Contact.

You can **add a Contact** by clicking ***Add Contact*** in the top right corner.



Advanced Search

Contacts Advanced Search allows you to **filter and segment your Contacts** based on specific search criteria.

Once you have Advanced Searched for Contacts, **you can perform *Actions* on the records in bulk**, such as:

- Update multiple contacts at once
- Add/remove a Tag to multiple contacts at once
- Build a Group or Smart Group (first step to Bulk Emailing)
- Export the segmented contact list

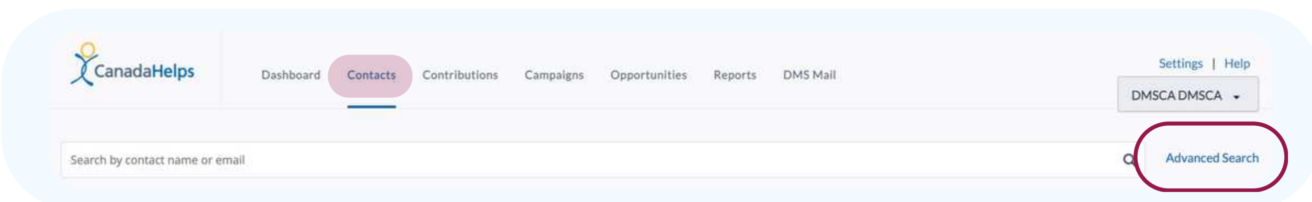
When to Use Advanced Search for Contacts?

- Compile a list of potential donors;
- Prepare Contacts for a mailing;
- Create Groups or Smart Groups;
- Identify Contacts who donated within a specific time frame, or find Contacts that have specific attributes that cannot be found using the Simple Name Search.

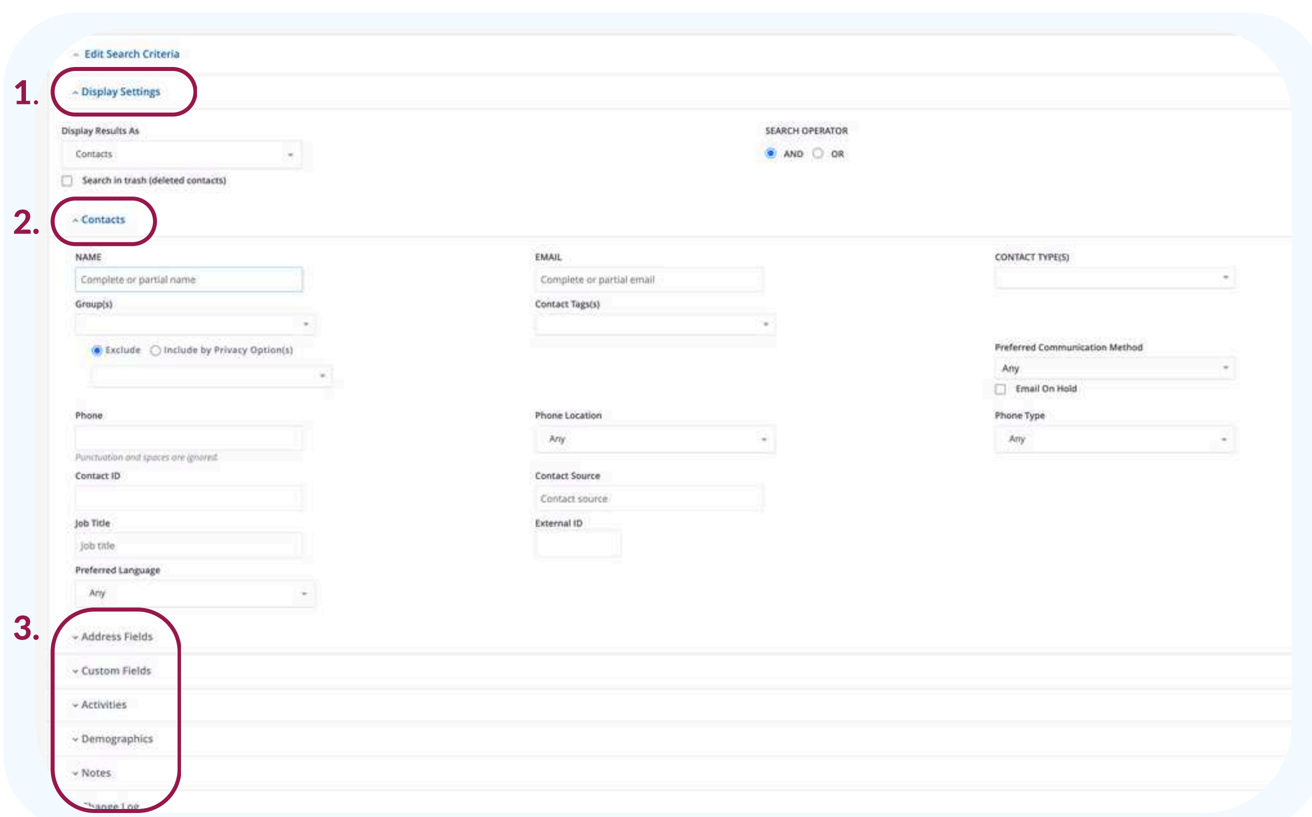
Example: build a list of Contacts who have donated over $100 in the current year in Ontario.

Follow the steps to perform the action:

1. Click on ***Advanced Search***



3. The first two sections ***Display Settings (1)*** and ***Contacts (2)*** will be opened. You can access **more filters (3)** by clicking on the section headers. To collapse any section, click on its header again.



4. Use the available filters to input your desired search criteria. **To generate the results**, click ***Search*** towards the bottom of the search filters.

5. If you wish to **add more filters to your search**, select ***Edit Criteria***, add new filters and click ***Search.***

6. **To start a new search from scratch**, select ***Reset Form***.

7. Once ready, you can perform an ***Action*** by choosing ***All Records*** if needed.

If you want to explore full capabilities of ***Advanced Search***, please take a look at [**this article.**]

Contact Types

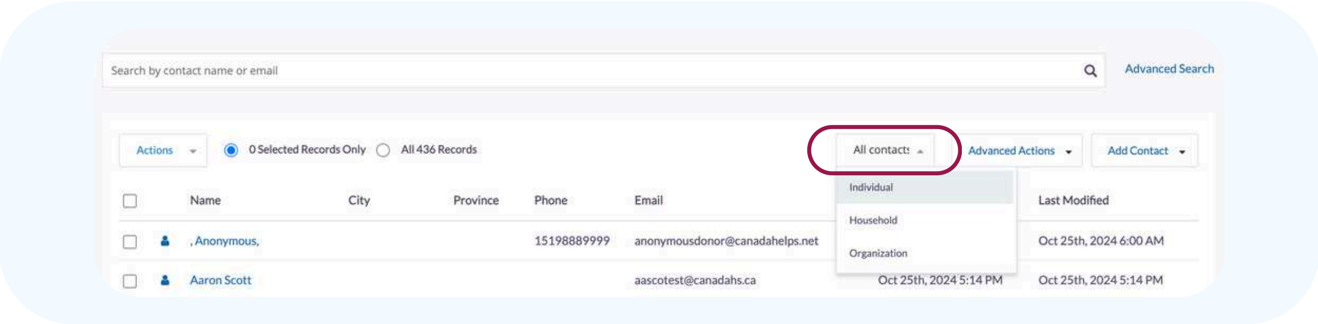
There are three types of Contacts in the DMS:

(1) Organizations
(2) Individuals
(3) Households

To the left of the Contact Name, you'll see one of the three icons representing the different Contact Types.

If you hover your mouse cursor over one of these icons, you can see more details about a Contact.

To filter your list view by Contact Type, select ***All Contacts*** on the top right corner of the screen, and then select your desired Contact Type.



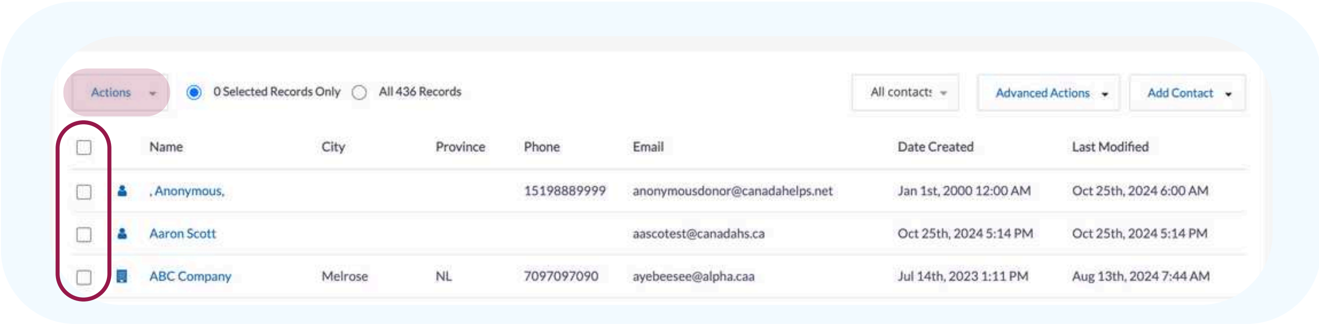
Contact Actions

From your Contacts tab, you can perform a variety of actions on one or more Contacts.

The available Actions include adding Contacts to Groups, applying or removing Tags, sending emails, exporting Contacts and more.

1. **To perform an *Action***, select specific Contacts (using checkboxes on the left) or select all listed Contacts on the page (top checkbox). You can also select all contacts in your DMS by clicking on ***All # Records***.

2. Once you have selected the Contact(s), press the ***Actions*** button at the top left.



3. If there is a particular Action you wish to perform, you can find it by scrolling through the dropdown list or typing it into the search bar.

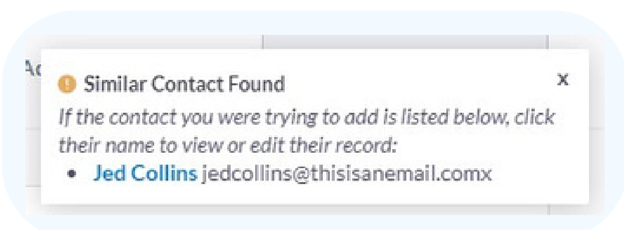
Common Actions

Export Contacts: exports selected Contacts in the .CSV format
Group – Create Smart Group: create a Smart Group based on your search criteria
Issue Annual Tax Receipts: issue an annual tax receipt via email and/or PDF format
Send Email: send a single email to one of your Contacts

Adding a single Contact

1. Go to the Contacts Tab
2. Select Add Contact on the top right
3. Select whether your new Contact is an Individual or an Organization.
4. As you enter the name of your new Contact, the DMS will automatically check for possible duplicate entries

Note: *'Household' is a legacy feature of the DMS and not recommended for use. Instead, learn* ***how to add a Relationship to your Contacts in this article****.*



Modifying a single Contact

1. Go to the ***Contacts Tab***
2. **Search for the Contact** you wish to modify and click on the name
3. Press the ***Edit*** button on the top right of the screen
4. Once changes are made, select ***Save*** to edit the Contact **or *Save And New*** to edit the Contact and create a new one.

Note: *You can change the Contact Type if you have manually added a new Contact using the incorrect Type, but it has existing data that you wish to retain (Contributions, Activities, Groups, Tags, etc).*

Do not modify Contact Types for CanadaHelps Contacts: it's up to your donors to decide whether they'd like to contribute as a corporate or individual donor via CanadaHelps.org.

Learn how to modify multiple contacts at once here.

Understanding Groups, Smart Groups & Tags

Groups & Smart Groups help you categorize, segment, and manage Contacts in the DMS. They allow you to perform actions on multiple Contacts at once, like sending emails, adding Tags, or filtering Reports.

Groups are static contact lists managed manually. You add or remove Contacts individually and use Groups to organize segments without specific criteria.

Example: You can create a "Party Planning Committee" Group to organize specific Contacts. When Erin Hannon joins, you can manually add her to the group.

Smart Groups are dynamic lists of Contacts that are automatically updated based on set criteria. You will set these criteria while performing an ***Advanced Search*** for your list of Contacts.

Example: A new donor from Vancouver will automatically appear in the "Vancouver Newsletter" Smart Group.

Learn more about Adding, Modifying & Deleting a Smart Group.

You can **Tag** your Contacts with relevant labels, which will allow you to perform actions on the Tagged Contacts:

- Perform an Advanced Search to view all Contacts with a particular Tag

- Create a Smart Group of these Contacts so that you can go back to the list at a later date or create a mailing list for Bulk Emails (DMS Mail)
- Perform an Advanced Search of Contributions Contacts with a particular Tag in order to view Contributions from your Tagged Contacts
- Filter Reports by Contact Tags

Common Tags:

- Volunteer
  - Part-Time Volunteer (child tag)
  - Seasonal Volunteer (child tag)
- Board Member
- Staff Member

Learn more about creating Tags and Tagging your Contacts.

Contributions & Tax Receipting

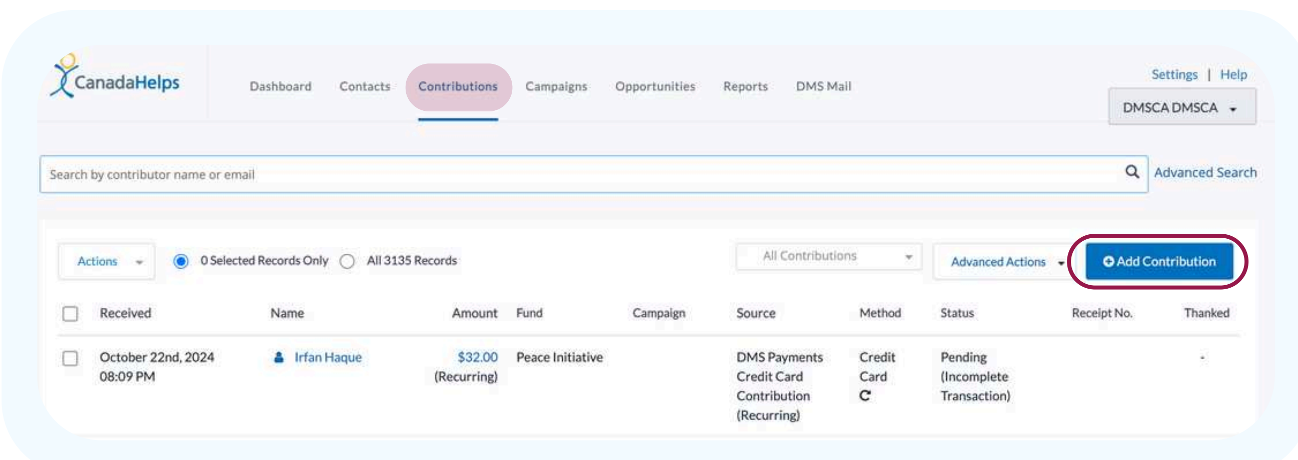
Contributions in the DMS track all donations made to your organization, categorized into two main sources: CanadaHelps Contributions and Offline Contributions.

1. **CanadaHelps Contributions** are donations made through various CanadaHelps fundraising options, including your charity profile page, custom donation forms, ticketed events, peer-to-peer campaigns, donations of securities, and cryptocurrency. These contributions are processed through CanadaHelps, which issues tax receipts, and only limited details can be edited within the DMS.

2. **Offline Contributions** refer to any donations not made through CanadaHelps.org. Once recorded in the DMS, these contributions will be automatically tracked as Source: DMS Manual. As these donations are made directly to your organization, you can easily issue tax receipts for all Offline Contributions using the DMS.

Adding & Modifying a Single Contribution

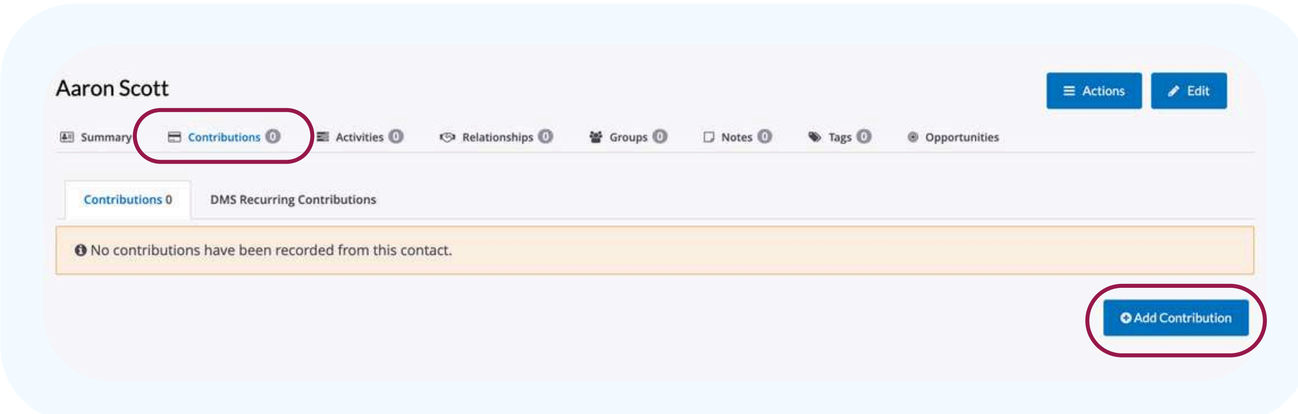
1. Visit the ***Contributions*** Tab
2. Select ***Add Contribution*** on the top right corner of the screen
3. Fill out all the required fields on the ***New Contribution*** page



***Note: Source** field is the origin of the donation (e.g., Historical Data Import); you can add a new source using +Add New Source on the right. For offline contributions, the default source is DMS Manual, while contributions from CanadaHelps.org have a default source of CanadaHelps.*

You can add contribution details such as Exclude From Tax Receipting (learn when and how to exclude here), Mark Contribution Receipted (if issued externally), External Receipt Number (if applicable), Contribution Note, Mark Contribution as Recurring, Dedication Information, and additional details like fee and advantage amount. You can also mark the contribution as thanked.

You can **also add a contribution directly from the contact's profile.** To do this, find the contributor in the ***Contacts tab***, click on their name, then select ***Contributions*** and click the ***Add Contribution*** button on your right.

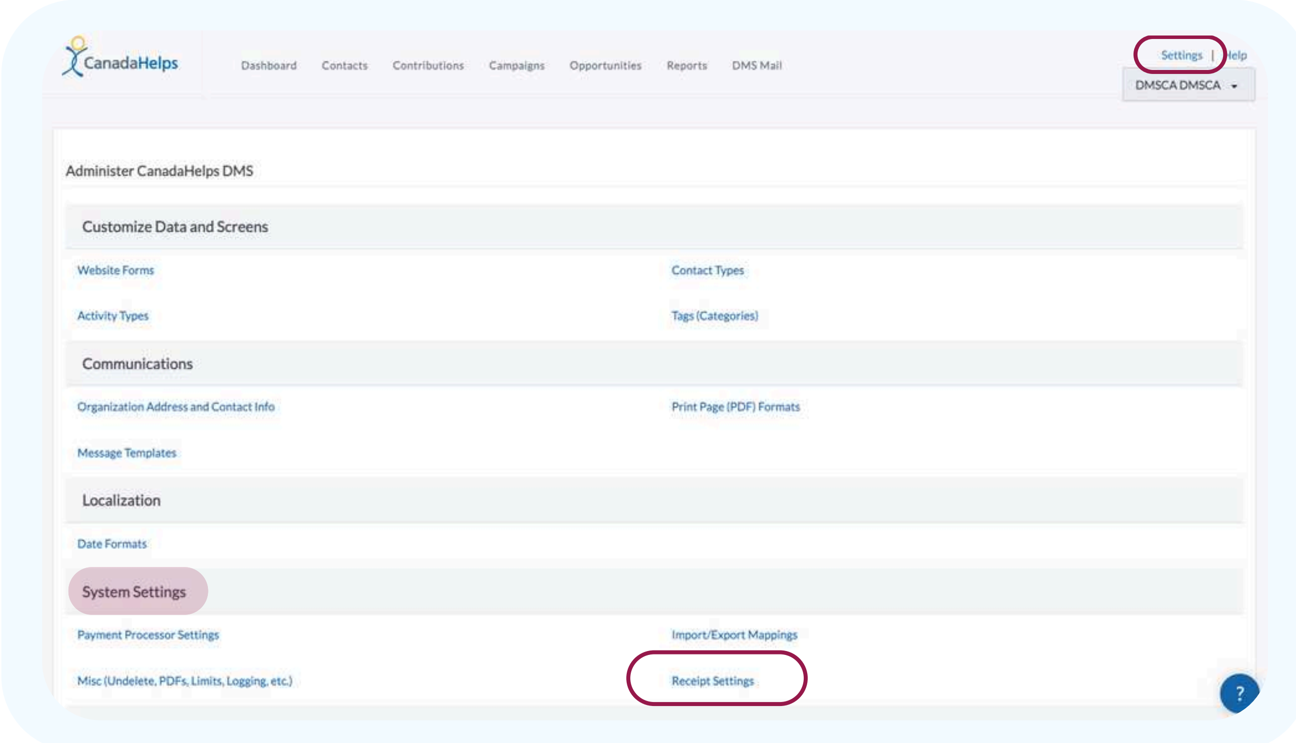


Learn more about Recurring Contributions here.

Tax Receipting and Configuring your Tax receipts

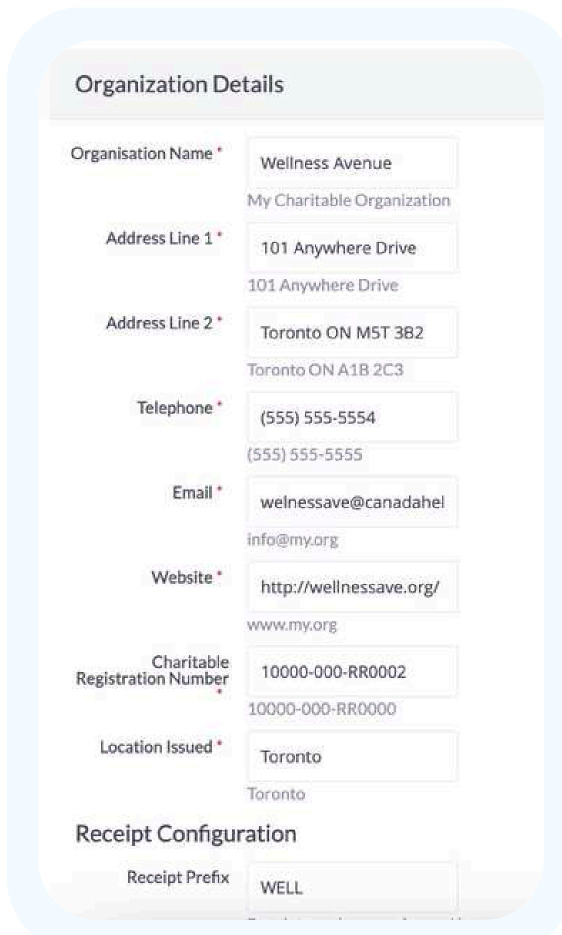
To issue Tax Receipts through the DMS, please make sure that the information required by the CRA is properly configured and up-to-date:

1. To configure your Tax Receipts Settings, visit your Administrative ***Settings***.
2. Under ***System Settings***, select ***Receipt Settings***
3. Fill out all the necessary information that will be populated on your charitable tax receipts



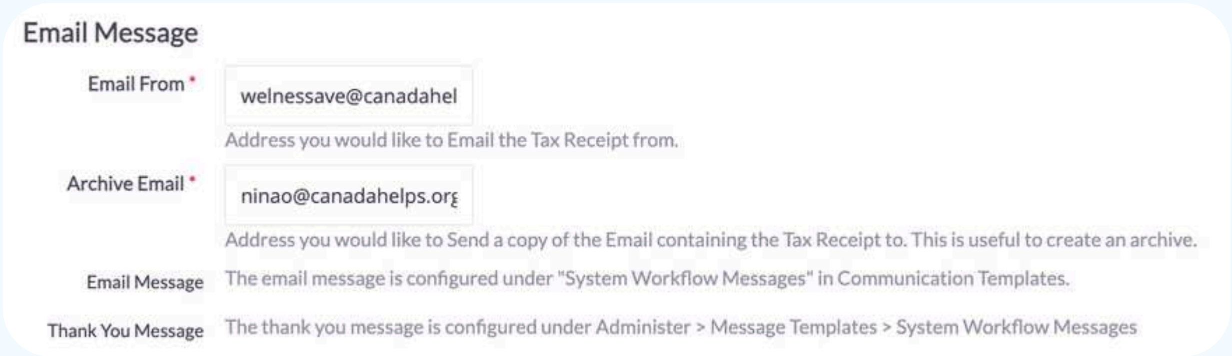
Organization Details: The unique information about your organization. Please fill out all the required fields in this section.
Location Issued: City, Town or Municipality where your receipts are issued or that of your charity's operational base. It ensures compliance with tax regulations by confirming the receipt's origin.
Receipt Configuration: The visual elements of your Tax Receipts and how they will be recorded in your DMS. Please fill out the following fields.

Add details such as **Prefix** (a prefix appends to each tax receipt number you issue through the DMS helping you differentiate DMS-issued tax receipt numbers from CanadaHelps tax receipt numbers; it currently defaults to "CRM"), along with your **Organization Logo** and **signature image**.



From Email and Archive Email

Choose how Tax Receipts will be delivered (donor-facing) **and stored** (internal record-keeping). Please fill out all the required fields in this section.



Email From / From Email: the email address that is donor-facing, and will display when issuing Tax Receipts by Email and other email communications (i.e. Thanking your Donor and Bulk Emails).

Archive Email: for record-keeping purposes (and as required by the CRA), this is an organizational email address to which copies of each tax receipt will be emailed. You can modify this Archive Email address at any time.

After all necessary fields are added, press ***Submit*** button at the bottom of the page.

Make sure that your organization's DMS information is up to date. Return to your **Administrative Settings**, select **Organization Address** and **Contact Info** under Communications. This information will be used in your tax receipt PDF thank-you note.

You can also watch our guided walkthrough here.

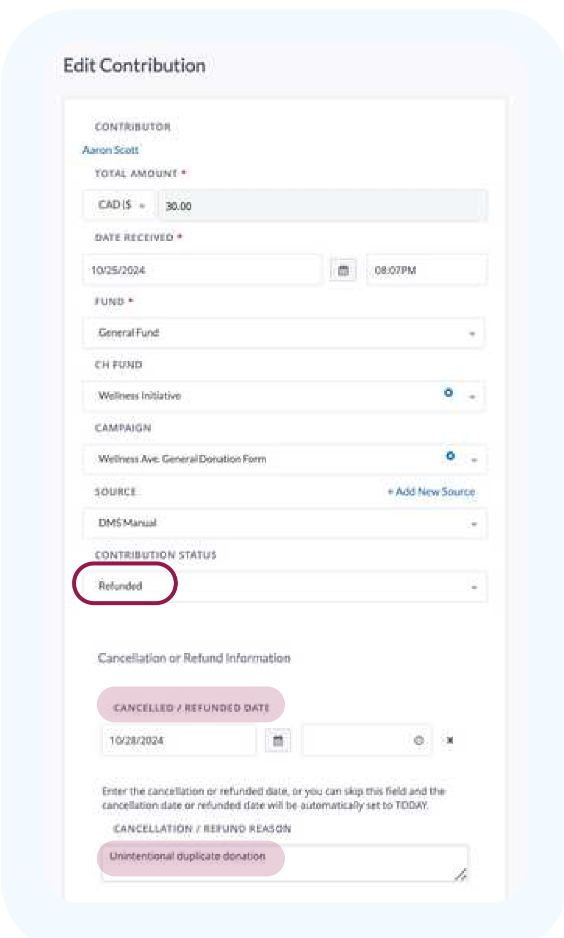
Refunding or Cancelling the Contribution

Under special circumstances, your charity may need to refund an offline Contribution (i.e., a gift not made through CanadaHelps.org). You can keep track of any refunds in your DMS **by simply modifying the original Contribution**. It will be up to you to decide the best way to credit your donor for the refunded amount.

You can only change the Contribution Status for offline Contributions and not CanadaHelps Contributions.

If the Contribution you're looking to refund has not been receipted:

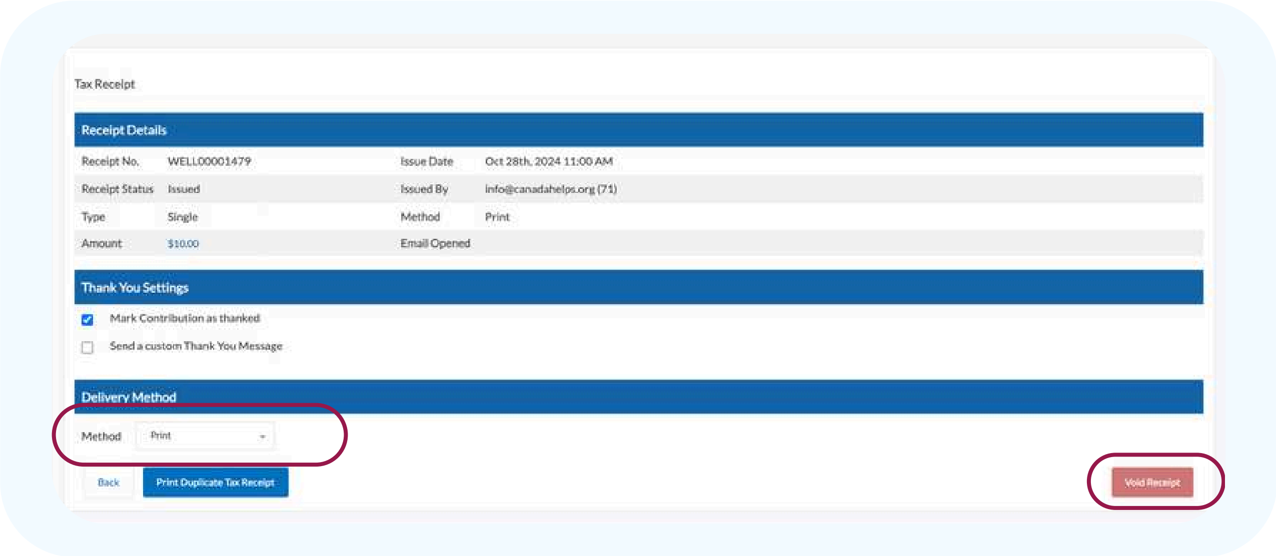
1. Find the Contribution that you would like to refund.
2. Under Contribution Status, change the status from Completed to Refunded, and click Save.
3. Once the Contribution Status has been changed to 'Refunded', back on the Contribution details page, you'll notice that the Contribution is no longer eligible for a tax receipt



If you need to refund a Contribution which has already been receipted:

Make sure to void the original tax receipt before changing the contribution status, so you can access a copy of the voided receipt to send to your donor.

1. **Search for the Contribution** you want to void the tax receipt for and ***click on the dollar amount*** (highlighted in blue: $50.00, $30.00, etc.).
2. On the next page, select ***Manage Receipt*** in the top-right
3. Select ***Void Tax Receipt*** on the bottom-right (*note: your Contact won't be notified even if Email had previously been the Delivery Method*).



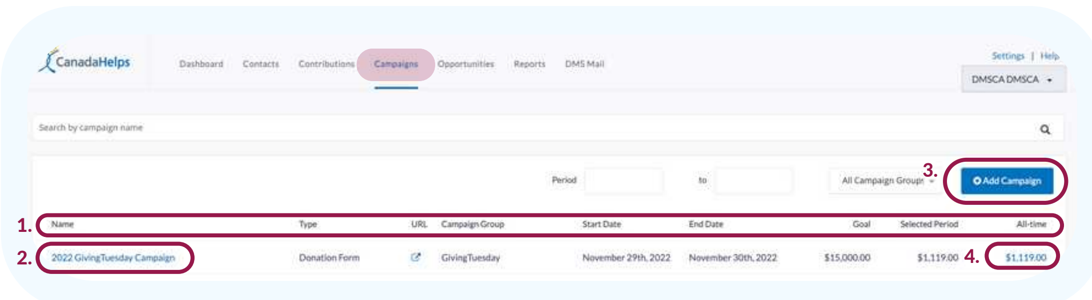
4. You can then download the voided tax receipt (to send a copy to your donor) by selecting **Print** as the Delivery Method.

We highly recommend watching our Tax Receipting Webinar.

Campaigns

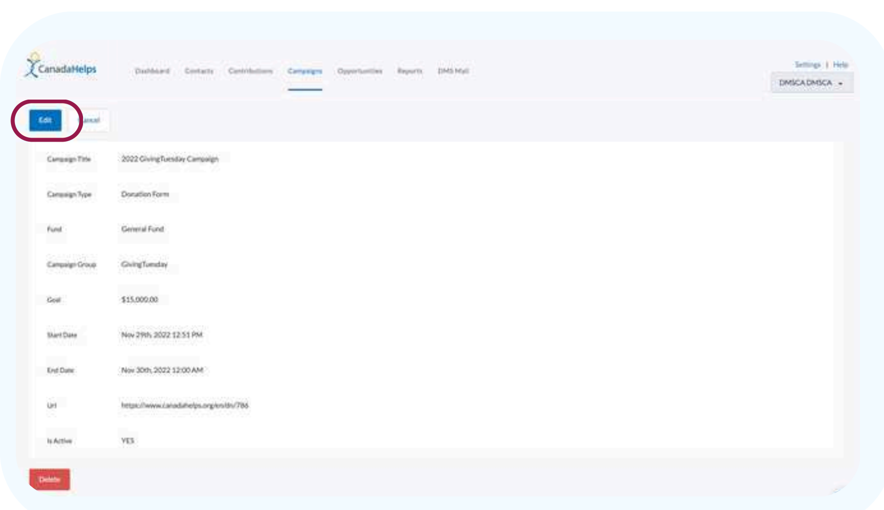
You can use the Campaigns tab in your DMS to track and centralize all Contributions pertaining to the same fundraising appeal, whether online or offline.

- 1. Your Campaigns tab displays a list of all fundraising Campaigns you have organized online through CanadaHelps or recorded manually in the DMS. **To sort the campaigns, click on the header of any column.**
- 2. **To access a Campaign record**, simply click on the ***campaign name.***
- 3. You can also **add your new Campaigns** by clicking ***Add Campaign*** in the top right corner.
- 4. **To view the list of all Contributions** made under a Campaign, ***click on the amount*** in the All-Time column. You can also manually record an offline contribution to count towards the campaign.



Viewing Campaign's Details

To view details about a specific Campaign, select the campaign name to access the Campaign Details page, where you can see and ***Edit*** key information.

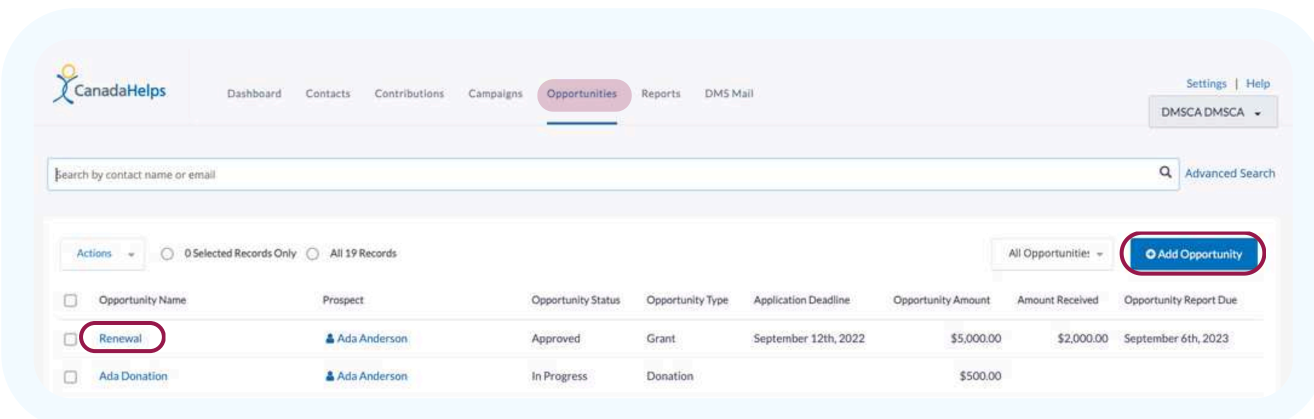


Opportunities

The Opportunities tab allows your organization **to record and track the status of** medium to long-term funding requests like **grant applications, major gifts, donation pledges and special projects**.

Each Opportunity is associated with both a Contact in the DMS (the Contact you are approaching for funding) and a DMS User (the individual at your organization responsible for overseeing the Opportunity).

To access a single Opportunity, click on the name of the Opportunity. **You can also add an Opportunity** from this tab by selecting ***Add Opportunities*** in the top right corner.



Opportunity Lists Columns:

Opportunity Name: the name of the grant or project.
Prospect: the name of the Contact you are approaching for the Opportunity.
Status: the stage the Opportunity is in such as Submitted, Eligible, etc.
Type: if the Opportunity is a grant, donation cultivation or another project.
Application Deadline: the deadline for when an application for this Opportunity is due.
Amount Requested: the monetary amount requested for each Opportunity.
Amount Received: the monetary amount received for each Opportunity.
Report due: the deadline for when a report for this Opportunity is due.

You can also perform actions for opportunities, such as ***Delete Opportunities***, which completely removes an opportunity and its information from the DMS;
Export Opportunities, which exports selected opportunities to a .csv format compatible with Excel or Google Sheets; and ***Print Selected Rows***, which prints the information of the selected opportunities via your web browser.

Reports

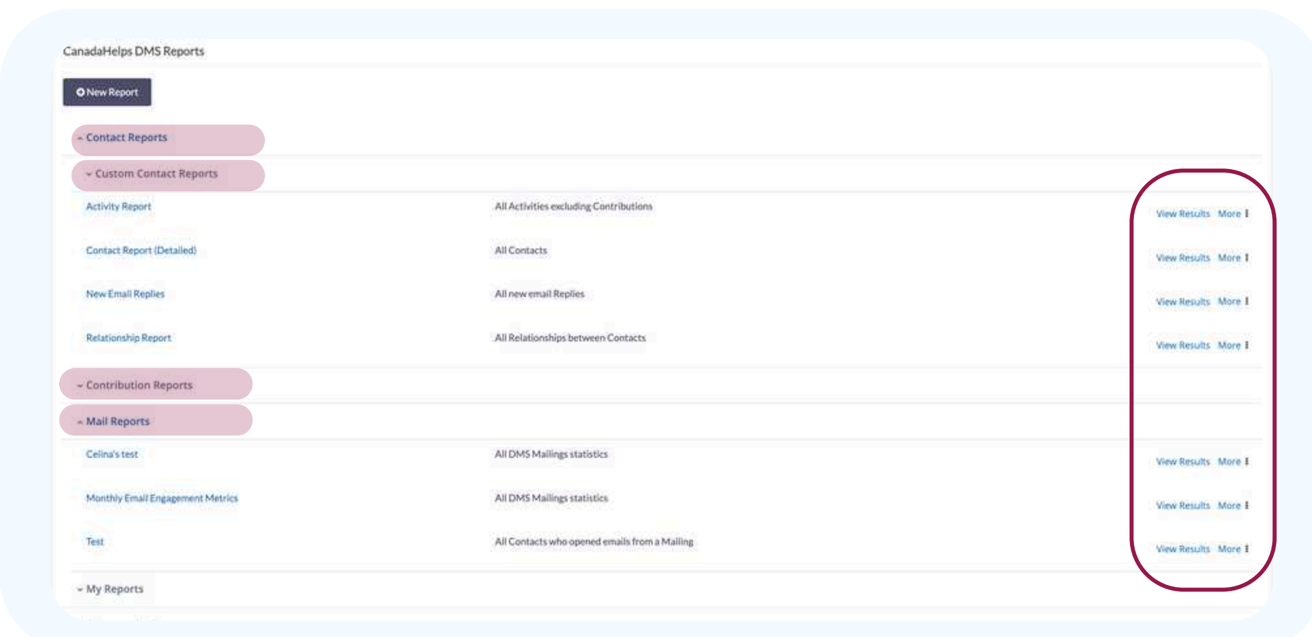
The Reports Tab contains a list of Contribution, Contact, and Opportunity Reports that can be used to understand key insights about the Contacts and Contributions in your DMS. These reports can also be added to your Dashboard.

Each Report is represented by a row and contains:

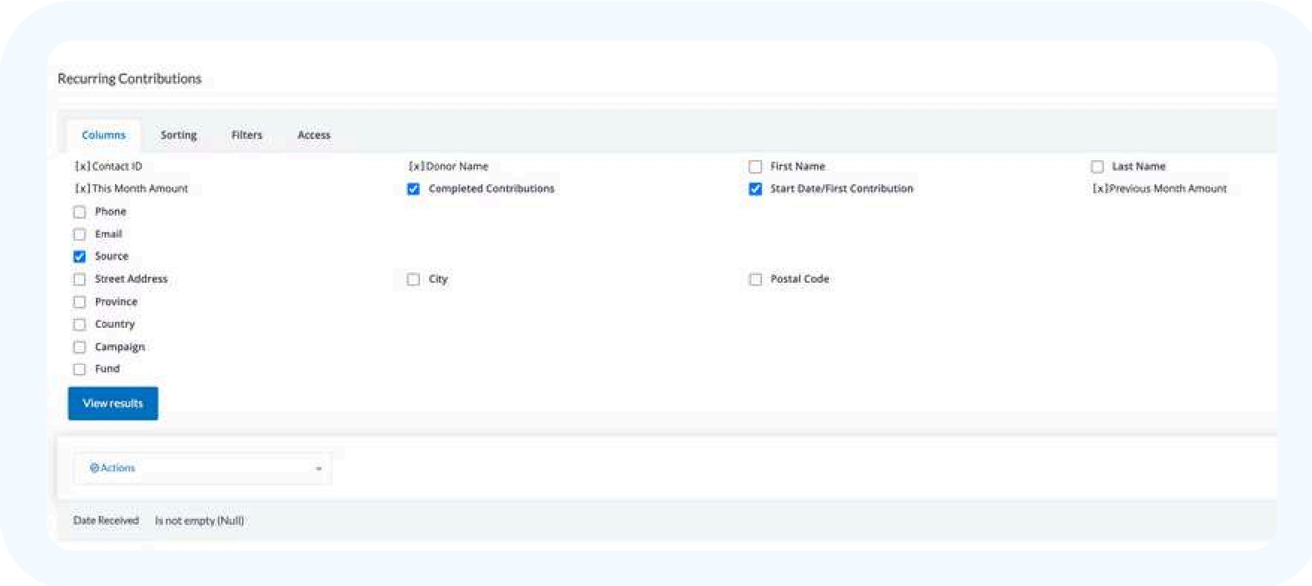
The name of the Report, (e.g. Contribution History by Campaign (Summary)),
A description of the Report,
And the option to run the Report by selecting *View Results*.

Running a Report

1. Under the ***Reports Tab***, select ***View Results*** beside a Report to generate it with the pre-set columns and filters.



*2. Otherwise, select the name of a Report to be able to customize its Columns, **Sorting and Filters**. Once ready, select **Refresh Results**. (see the screenshot below)*



Types of Contribution Reports

Campaign Reports provide insight into the progress and outcomes of your fundraising Campaigns. Campaign Reports are useful if you are interested in knowing how the specific initiatives you are using to raise money are performing.

Fund Reports provide insight into how much of the money you have raised has been allocated to the specific Funds you have configured in your DMS. Fund Reports will enable you to track what can be spent on various initiatives.

GL Account Reports provide insight into how much of the money you have raised has been allocated to the specific GL Accounts you have configured in your DMS.

Receipts Report provides a full list of all Contributions that have been issued a Tax Receipt, the Name of the Contact, the amount of the Contribution and the Tax Receipt Number. It can be filtered by ***Source*** to identify which Contributions have been receipted directly through the DMS or receipted outside of the DMS such as CanadaHelps or other third party sources.

There are additional Reports that can be used to provide further insights into the data in your DMS such as: **Contribution History by CH Fund** (Summary) and **Contribution History by Source** (Summary)

For an in-depth overview, we invite you to review this article.

We also highly recommend watching our Reports webinar.

DMS Mail

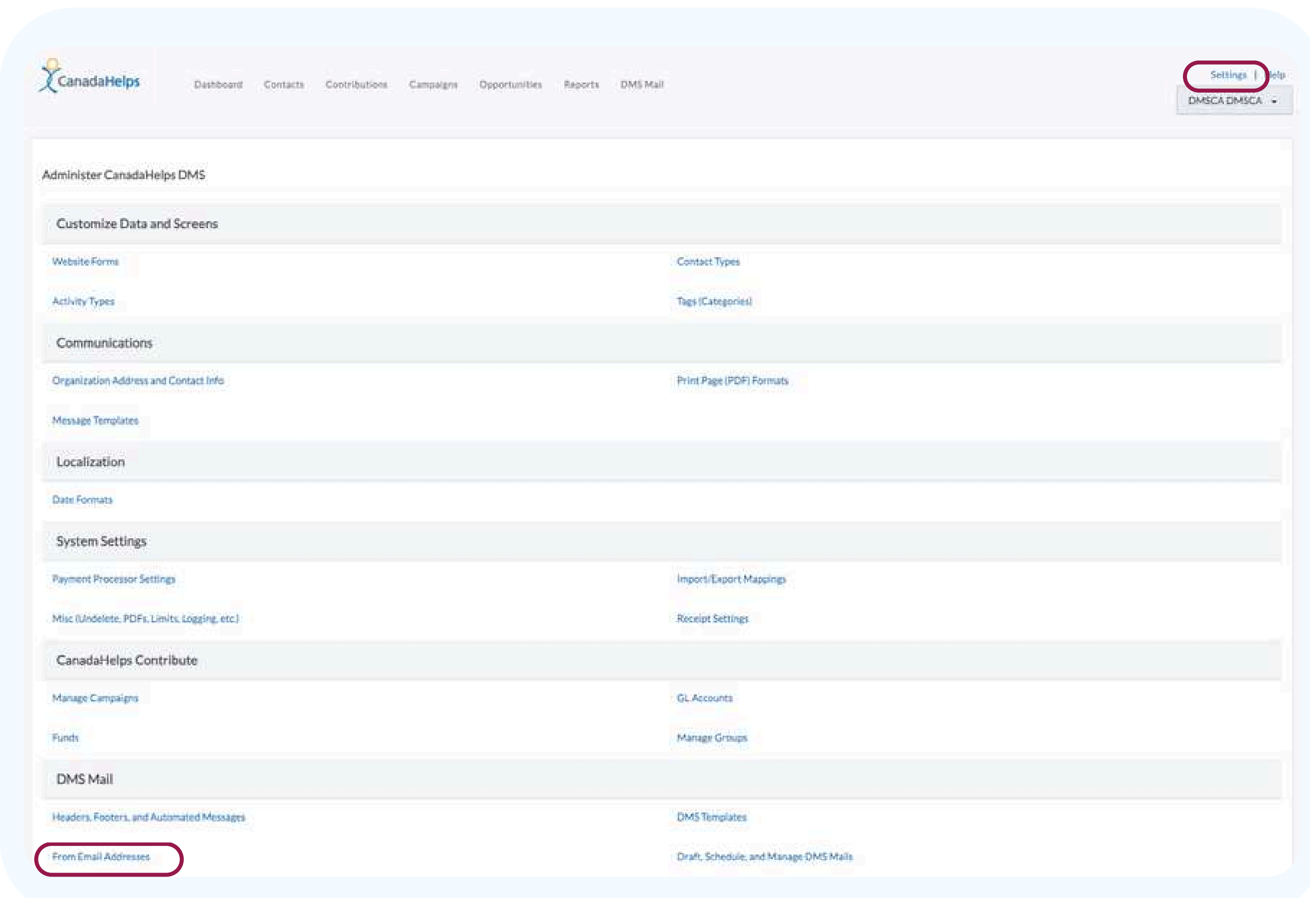
The DMS has a built-in DMS Mail tool that can be used for your newsletters, announcements and any other mass communications with your Contacts.

Emails through the DMS are powered by our trusted partner SendGrid. **In order to perform basic functions like sending emails and tax receipts**, you will need to connect your organizational email address with your DMS. This email will be considered your ***DMS From Email.***

If you are a new admin, please check which email address within your organization best represents you in donor communications and **ensure that it is up to date.**

To do so please follow the steps:

1. Go to ***Settings*** and scroll down to ***From Email Addresses***
2. Make sure that the correct email address is marked as ***SendGrid Verified***



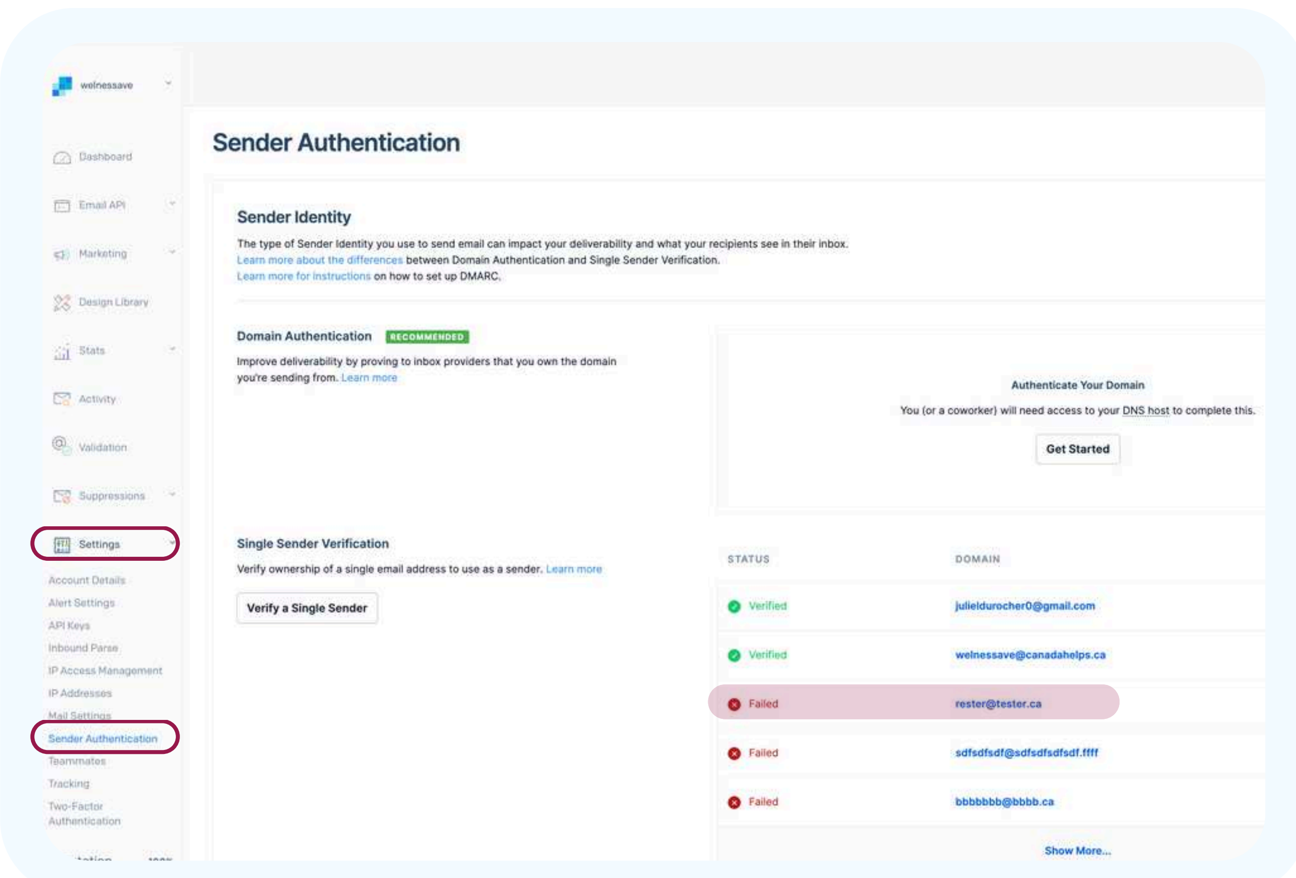
If your From Email Address is not verified or not listed:

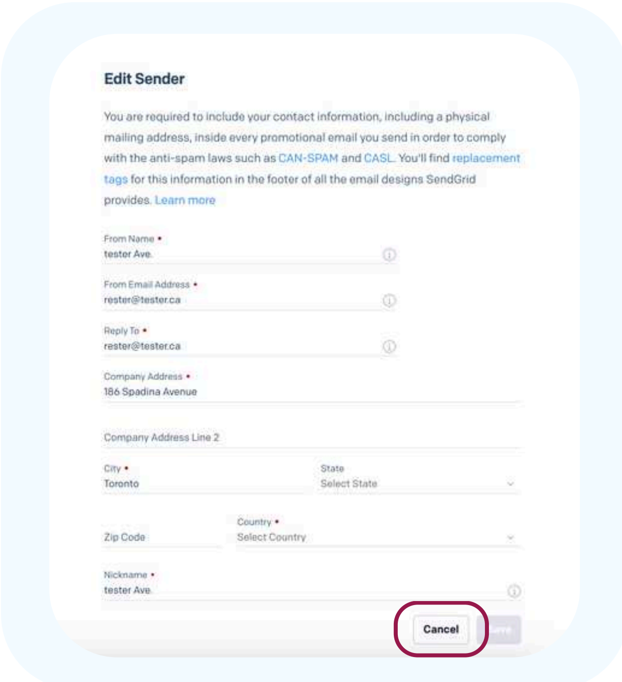
If you would like to add another email address click on ***Add From Email Address***. It will automatically be marked in red and shown as "not verified"

When you first started using the DMS, your DMS onboarding expert shared the credentials for signing into your SendGrid account. If you have lost this information, please contact our support team at ***info@canadahelps.org***, otherwise, ***sign in to your account***.

Once you're logged into SendGrid, before you can begin sending emails in the DMS, the final step to complete the email verification process ***is to trigger a verification email.***

1. From the SendGrid home page, navigate to ***Settings***. This will open the option to click on ***Sender Authentication***





2. On the next page, **select your email address** under ***Single Sender Verification***

3. On the page that will open up, select ***Cancel.***

4. Select the three dots that appear to the right of the page (under ***Actions***) and select ***Resend Verification***.

5. You'll then receive one final email to your preferred charity email. Open this email and click the ***Verify Single Sender*** button.

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This should immediately change your ***From Email*** status in your DMS instance from ***not verified to verified***.

For more details, please see this article.

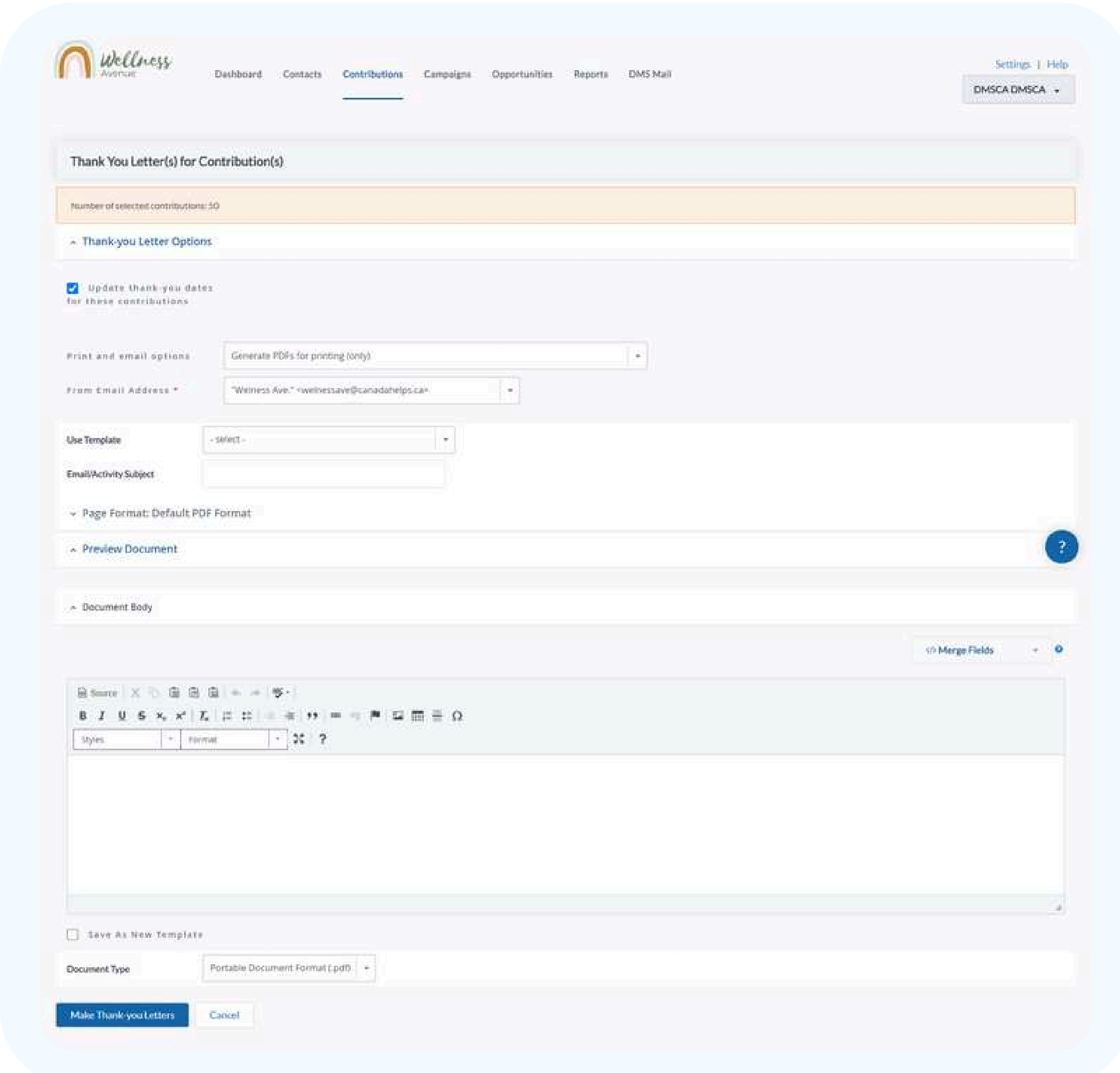
Sending Thank You Emails

To send a separate thank you message, follow the steps below:

1. Go to the ***Contributions*** Tab

2. ***Search for a specific Contribution*** or select either:
- The specific Contributions associated with the Contacts you wish to thank,
- Every listed Contribution on the page, or
- All Contributions in your search criteria

3. Select the ***Actions*** menu at the upper-left side of the ***Contributions list***
4. Scroll down the ***Actions menu*** and select ***Send Thank You***
5. On the next page, you will see the following information:



6. Fill out all mandatory fields and compose your ***Thank-you Letter***.

7. You can **use an existing Template** or **save the contents of your newly composed** email/letter by selecting ***Save As New Template***

8. Select ***Update thank-you dates*** for these contributions at the top left of the page if you want to update the date the associated **Contacts were Thanked**.

9. After all the necessary information is added, select ***Make Thank-you Letters*** at the bottom of the page **to print your letters and/or send emails** to the associated Contacts.

Avoid confusing donors with duplicate thank-you messages. The DMS offers two ways to verify if a thank-you message has been sent:

- Thanked column in the Contributions tab
- Mark Contribution as Thanked in the Receipting portal

If you need to mark a contribution as thanked without sending an email or letter, you can select ***Mark Contribution as Thanked*** during the Receipting step.

More detailed information about sending Thank-you messages can be found here.

Modifying the Default Tax Receipt Emails

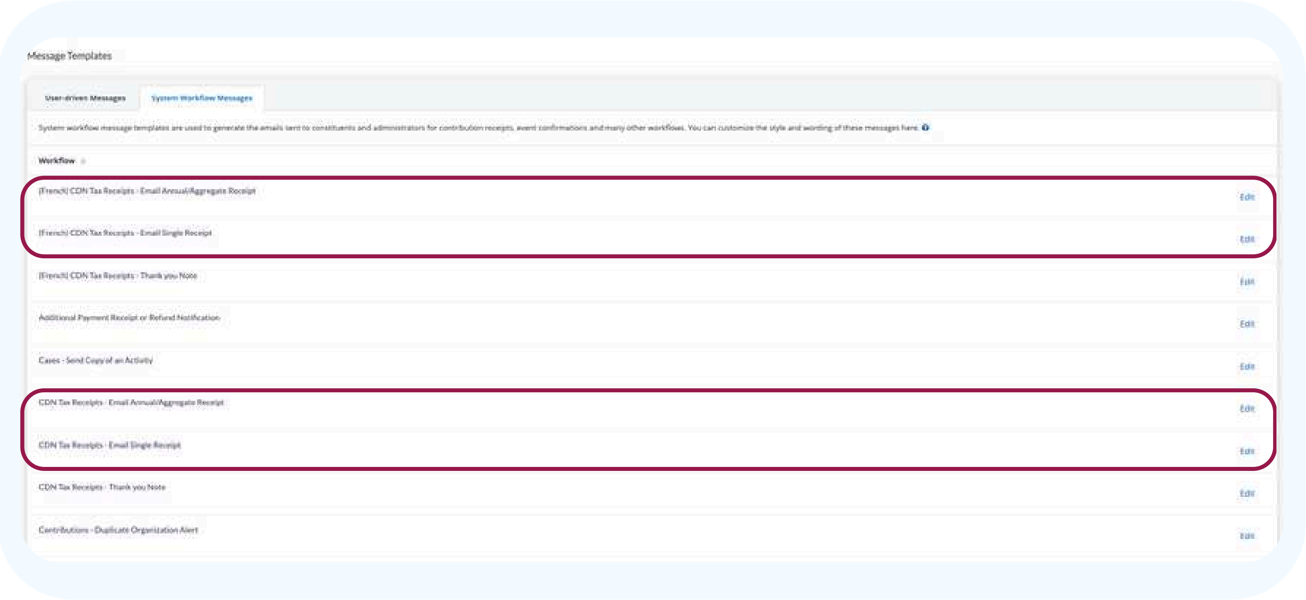
When issuing and re-issuing DMS-issued tax receipts, if you've chosen email as the delivery method, your tax receipts will include a thank-you email message in the body of the email with the donor's tax receipt attached.

You can only set one single "From Email" when issuing, re-issuing and cancelling Tax Receipts.
Be sure to set your default emails for both English and French receipt, so the default emails correspond to the issued tax receipt's language.

To modify your Message please follow these steps:

1. Visit your administrative ***Settings.***
2. Under ***Communications***, select ***Message Templates***
3. On the next page, select ***System Workflow Messages***
4. Then, you will see a list of all ***Default Messages*** in the DMS. The only Default Messages related to Tax Receipts are the four with:

- **CDN Tax Receipts – Email Annual/Aggregate Receipt:** Email used when issuing, re-issuing and cancelling Combined Receipts with Total Contributed.
- **CDN Tax Receipts – Email Single Receipt:** Email used when issuing, re-issuing and cancelling Separate Receipt for Each Contribution.



5. Select ***Edit*** on either one of these default messages (Top two for French / Bottom two for English):
6. You will then be able to edit the **default Tax Receipt email**. Once ready click on ***Save***

[We highly recommend watching the Communicating with Donors webinar.]

Your Go-To Checklist

- Make sure that the **correct email address is connected** to the DMS
- Check **tax receipt settings**
- Check if your **Organization's information** is up to date
- Create your **new Email Template**
- Make sure you have all the necessary **report templates** set up
- Customize your **dashboard**
- Learn **how to add a contact**
- Learn **how to add a contribution** by creating a test contribution
- Learn **how to issue and void your first tax receipt**

We hope that this overview provided you with a better understanding of what the DMS is all about and how it's going to help you get the most of your data while simplifying key day-to-day tasks.

We highly recommend exploring our webinar videos if you're looking to deepen your knowledge on any topics covered in this introductory manual. For additional support, you can also **click the *Help*** button in the top-right corner of the screen to access our ***Help Portal*** or reach out to our excellent support team **by emailing us at info@canadahelps.org.**

Watch all Training Webinars