

Navigating the Contributions Tab

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Donor Management System

Keep track of every Contribution in the DMS in order of the most recent Contribution Date. You can also add a Contribution from this Tab by selecting **Add Contribution** in the top right corner.

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The screenshot shows the 'Contributions' tab in the Donor Management System. The interface includes a navigation menu with 'Contributions' highlighted, a search bar, and a table of contribution records. The table has columns for 'Received', 'Name', 'Amount', 'Fund', 'Campaign', 'Source', 'Method', 'Status', 'Receipt No.', and 'Thanked'. The 'Add Contribution' button is visible in the top right corner.

Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
<input type="checkbox"/> March 1st, 2023 09:41 AM	Noboru K	\$50.00 (Recurring)	2023	Monthly Giving Webinar	DMS Manual	Cheque C	Completed		
<input type="checkbox"/> February 27th, 2023 01:28 AM	Karolina Maya	\$1.23 (Recurring)	Fitness		DMS Payments Credit Card Contribution (Recurring)	Credit Card C	Completed		-
<input type="checkbox"/> February 27th, 2023 01:28 AM	Benjamin Franklin	\$1.23	Fitness	Bottle Drive	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed		-
<input type="checkbox"/> February 27th, 2023 12:30 AM	Noboru K	\$10.00 (Recurring)	Fitness	Noboru's Test Form	CanadaHelps	CH - Credit Card C	Completed		-
<input type="checkbox"/> February 27th, 2023	Jubin O	\$87.00	Fitness	Charity Profile	CanadaHelps	CH - Credit Card	Completed		-

Contributions Tab Columns

- **Date:** the date the Contribution was made.
- **Name:** Contact's last, first names.
- **Amount:** the Contribution's dollar amount. Select the amount to see the [Contribution Details](#).
- **Fund:** the Fund the Contribution is associated with.
- **Campaign:** the [Campaign](#) the Contribution is associated with. Select its name to see the [Campaign Details](#).
- **Source:** the source associated with that Contribution when it was originally imported into the DMS (e.g. Historical Data Import).

- **Method:** the original payment method of the Contribution.
- **Receipt No.:** if the [Contribution was receipted](#), you'll be able to see its Receipt Number.
- **Thanked:** if the Contact has been thanked for that Contribution (represented by a checkmark).

Actions

There are many Actions you can perform from the Contributions Tab to one or more Contributions. The available Actions include exporting Contributions, issues Tax Receipts and more.

Perform an Action

To perform an **Action**, select either:

- (1) **The specific Contributions** you wish to perform an Action to,
- (2) Every listed Contribution **on the page**, or
- (3) **All Contributions** in your search criteria

The screenshot shows the 'Contributions' tab in the Wellness Avenue system. At the top, there are navigation links for Dashboard, Contacts, Contributions (active), Campaigns, Opportunities, Reports, and DMS Mail. A search bar is present with the text 'Search by contributor name or email'. Below the search bar, there are two radio buttons: '3 Selected Records Only' (selected) and 'All 1430 Records'. A table of contributions is displayed with columns: Received, Name, Amount, Fund, Campaign, Source, Method, Status, Receipt No., and Thanked. The table contains several rows of contribution data. A red box highlights the 'All 1430 Records' radio button, and another red box highlights the 'Received' column header. A third red box highlights the checkboxes in the 'Received' column. A blue question mark icon is visible in the bottom right corner of the table area. At the bottom of the screenshot, a grey banner contains the text: 'Select the records you'd like to perform an Action with'.

Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
<input type="checkbox"/>	Noboru K	\$50.00 (Recurring)	2023	Monthly Giving Webinar	DMS Manual	Cheque	Completed		✓
<input checked="" type="checkbox"/>	Alex Fergie	\$100.00	General Fund		DMS Manual	Cheque	Completed	WELL00000913	✓
<input type="checkbox"/>	Noboru K	\$1.00	2023	Monthly Giving Webinar	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed		-
<input type="checkbox"/>	Benjamin Franklin	\$1.23	Fitness	Bottle Drive	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed		-
<input checked="" type="checkbox"/>	Nicole Lam	\$250.00	General Fund		DMS Manual	Cheque	Completed	WELL00000912	✓
<input checked="" type="checkbox"/>	Lucas Froese	\$50.00	General Fund		DMS Manual	Cheque	Completed	WELL00000911	✓
<input type="checkbox"/>	Nicole Lam	\$150.00	General Fund		DMS Manual	Cheque	Completed		-

Select an Action

When you select the Actions button, a dropdown menu of available Actions will become available. If there is a particular Action you wish to take, you can find it by scrolling the Actions list.

Wellness Avenue | Dashboard | Contacts | **Contributions** | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

Search by contributor name or email [Advanced Search](#)

Actions 3 Selected Records Only All 1430 Records

	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
<input type="checkbox"/>	Noboru K	\$50.00 (Recurring)	2023	Monthly Giving Webinar	DMS Manual	Cheque	Completed		✓
<input type="checkbox"/>	Alex Fergie	\$100.00	General Fund		DMS Manual	Cheque	Completed	WELL00000913	✓
<input type="checkbox"/>	March 1st, 2023 01:52 AM	Noboru K	\$1.00	2023	Monthly Giving Webinar	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed	-
<input type="checkbox"/>	March 1st, 2023 01:51 AM	Benjamin Franklin	\$1.23	Fitness	Bottle Drive	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed	-
<input checked="" type="checkbox"/>	February 28th, 2023 06:30 PM	Nicole Lam	\$250.00	General Fund		DMS Manual	Cheque	Completed	WELL00000912 ✓
<input checked="" type="checkbox"/>	February 28th, 2023 03:40 PM	Lucas Froese	\$50.00	General Fund		DMS Manual	Cheque	Completed	WELL00000911 ✓
<input type="checkbox"/>	February 28th, 2023	Nicole Lam	\$150.00	General Fund		DMS Manual	Cheque	Completed	-

Select Actions to view a drop-down menu

All Actions

- **Export Contributions:** exports selected Contributions to a .csv format
- **Issue Aggregate Tax Receipts (Combined):** issue a combined tax receipt with total contributed via email and/or PDF format
- **Issue Separate Tax Receipts (Each Contribution):** issue a separate tax receipt for each Contribution via email and/or PDF format
- **Send Thank You:** thank the Contact associated with the Contribution via email or mail (print PDF)

Rows

Rows: 50 Page 1 1 - 50 of 19328

Customize how many records are displayed per page

Image Instructions

- The default number of Rows displayed on the Contributions Tab is set to 50.
- To adjust the number of Rows of Contributions displayed in the list view, scroll to the bottom of the page and press the “up” or “down” arrows on the box that is labelled *Rows*.
- To the right of the box labelled *Rows* are the number of pages of rows, the total number of Contributions in your DMS, as well as the ability to navigate to the next page list view.
- To navigate to the next page of Contributions, click the arrow pointing right on the far right side of the page. Click on the arrow pointing left to go back to the previous page.

Filter Contributions by Fund

- To filter your Contribution by Fund, select **All Contributions** and then a Fund to display all Contributions linked to that Fund.

The screenshot shows the 'Contributions' page in the Wellness Avenue system. At the top, there is a navigation bar with 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. A search bar is located below the navigation bar. The main content area features a table of contributions with columns: Received, Name, Amount, Fund, Campaign, Source, Method, Status, Receipt No., and Thanked. A dropdown menu labeled 'All Contributions' is highlighted with a red box. Below the table, a message reads: 'Select All Contributions to view a drop-down menu'.

Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
March 1st, 2023 09:41 AM	Noboru K	\$50.00 (Recurring)	2023	Monthly Giving Webinar	DMS Manual	Cheque	Completed		✓
March 1st, 2023 09:19 AM	Alex Fergie	\$100.00	General Fund		DMS Manual	Cheque	Completed	WELL00000913	✓
March 1st, 2023 01:52 AM	Noboru K	\$1.00	2023	Monthly Giving Webinar	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed		-
March 1st, 2023 01:51 AM	Benjamin Franklin	\$1.23	Fitness	Bottle Drive	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed		-
February 28th, 2023 06:30 PM	Nicole Lam	\$250.00	General Fund		DMS Manual	Cheque	Completed	WELL00000912	✓
February 28th, 2023 03:40 PM	Lucas Froese	\$50.00	General Fund		DMS Manual	Cheque	Completed	WELL00000911	✓
February 28th, 2023	Nicole Lam	\$150.00	General Fund		DMS Manual	Cheque	Completed		-

Recurring Contributions

- Recurring Contributions (e.g.: a monthly gift) will be indicated by the *(Recurring)* flag underneath the donation amount + Reference Number, and the “circular arrow symbol” underneath the Payment Method.

The screenshot shows a single contribution record for 'Winkle Family' on May 19th, 2020, for \$250.00. The record is marked as '(Recurring)' and includes a 'Debit Card' payment method with a circular arrow symbol. The contribution is for the 'Basic Fund' and 'Love Guardians'. A 'View' button is visible on the left. Below the record, a caption reads: 'Example: Recurring Contribution'.