

Adding & Modifying a Single Contribution

Last Modified on 05/16/2023 9:36 am EDT

Donor Management System

If your charity receives any offline Contributions (i.e., donations not coming from CanadaHelps) such as gifts of cash, cheques, EFTs or in kind, you can take advantage of your DMS to track these one-off gifts.

This article will cover adding and modifying a single Offline Contribution. You can also [add](#) multiple Offline Contributions at once.

Table of Contents:

- [Adding a Single Contribution](#)
 - [From the Contributions Tab](#)
 - [From a Contact Profile](#)
- [Modifying a Single Contribution](#)

Adding a Single Contribution

From the Contributions Tab

1. Visit the **Contributions Tab**
2. Select **Add Contribution** on the top right corner of the screen

The screenshot displays the Donor Management System interface. At the top, there is a navigation bar with the following tabs: Dashboard, Contacts, Contributions (selected), Campaigns, Opportunities, Reports, and DMS Mail. On the right side of the navigation bar, there are links for Settings and Help, and a dropdown menu for DMSCA/DMSCA. Below the navigation bar, there is a search bar with the placeholder text "Search by contributor name or email" and a magnifying glass icon. To the right of the search bar is a link for "Advanced Search". Below the search bar, there is a table of contributions. The table has columns for Received, Name, Amount, Fund, Campaign, Source, Method, Status, Receipt No., and Thanked. The table contains several rows of contribution data. In the top right corner of the table, there is a button labeled "Add Contribution" which is highlighted with a red box. Below the table, there is a dark grey bar with the text "Add Contribution" and a question mark icon in a blue circle.

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	Completed	✓
<input type="checkbox"/>	March 1st, 2023 09:19 AM	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 type="checkbox"/>	February 28th, 2023 06:30 PM	Nicole Lam	\$250.00	General Fund		DMS Manual	Cheque	Completed	WELL00000912 ✓
<input type="checkbox"/>	February 28th, 2023 03:40 PM	Lucas Froese	\$50.00	General Fund		DMS Manual	Cheque	Completed	WELL00000911 ✓

3. Fill out all mandatory and necessary fields on the New Contribution page:

DMS Payments

New Contribution

SaveSave and NewCancel

CONTRIBUTOR *

- select Contact -▼

PAYMENT METHOD *

- select -▼

TRANSACTION ID

Enter transaction ID

TOTAL AMOUNT *

CAD (\$)▼

\$ Enter amount

DATE RECEIVED *

03/01/2023

12:21PM

The date this contribution was received.

FUND *

- select -▼

CAMPAIGN

- select -▼

SOURCE + Add New Source

DMS Manual▼

CONTRIBUTION STATUS

Completed▼

Completed

- ▼ Additional info
- ▼ Contribution Details
- ▼ Dedication Information
- ▼ Additional Details

Save Save and New Cancel

Add Contribution details

Main Fields

- **Contributor:** the Contact making this donation.
 - You can further narrow your search based on specific criteria.

New Contribution Save Save and New Cancel

CONTRIBUTOR *

- select Contact -

Search by name/email or id...

Refine search...

New Household New Individual

New Organization

TOTAL AMOUNT *

Select your desired Contact or refine your search

- **Payment Method:** the payment method used to make this donation.
- **Transaction ID:** an additional external ID in addition to the automatic one created in the DMS (e.g. ID from an external payment processor).
- **Total Amount:** the total monetary amount for this donation.
- **Date Received:** the date this donation was received.
- **Fund:** the Fund this donation is going into.

- **Campaign:** the Campaign associated with this donation.
- **Source:** which source the donation is coming from (e.g. Historical Data Import). You can also add a new Source by selecting **+Add New Source** on the right.
 - When adding an offline Contribution, the default Source will be **DMS Manual**.
 - Contributions coming from CanadaHelps.org will have a default source of **CanadaHelps**.

Contribution Details

- **Exclude From Tax Receipting:** Select Yes if it is not eligible for TaxReceipting. Otherwise, you can either select No or leave the question blank.
- **Contribution Receipted:** Select Yes if a Tax Receipt for this Contribution has already been issued externally.

[Learn more about excluding a Contribution from DMS Receipting.](#)

- **External Receipt Number:** if the Contribution has been receipted externally, add the external receipt number.
- **Contribution Note:** optional note associated with the Contribution.
- **Mark Contribution as Recurring:** indicates if the donation is recurring. If it is, you still have to manually process the subsequent Contributions.

Dedication Information

- **In Memory Of:** if the donation is in memory of something and/or someone.
- **In Honour Of:** if the donation is in honour of something and/or someone.
- **Name of Honoree:** the name of the honoree associated with this dedication.
- **Message:** optional message associated with the dedication.

Additional Details

- **Advantage Amount:** the total monetary amount of the Advantage.
- **Advantage Description:** optional description for this Advantage (75 character limit).
- **Fee Amount:** external fee in addition to any CH fees (e.g. a fee from an external payment processor)
- **Thank-you Date:** the date and time that this donation has been thanked. The Contribution will be marked as **Thanked**.

5. Select **Save** to record the new Contribution.

From a Contact Profile

1. Go to the **Contacts Tab**
2. Search for the Contact to whom you'd like to add a Contribution and select their name

Wellness Avenue

Dashboard **Contacts** Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

miley

Advanced Search

Actions The Found Record

All contacts Advanced Actions Add Contact

<input type="checkbox"/>	Name	City	Province	Phone	Email	Date Created	Last Modified
<input type="checkbox"/>	Cara Miley	Montréal	QC		caramiley!@hotmail.com	Jul 19th, 2022 11:00 PM	Feb 9th, 2023 2:53 PM

Search for a Contact

3. On the following page, you'll see the Contact's Summary Profile. Select **Contributions**

Wellness Avenue

Dashboard **Contacts** Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

Cara Miley

Actions Edit

Summary **Contributions 2** Activities 8 Relationships 2 Groups 2 Notes 0 Tags 0 Opportunities

Home Address 8648 Boulevard Pie-IX
Montréal, QC H1Z 4G2
Canada

Home Email caramiley!@hotmail.com

Phone

Summary Fields

- Total Lifetime Contributions: 300.00
- Amount of last contribution: 180.00
- Date of Last Contribution: 09/16/2022 10:21AM
- Date of First Contribution: 07/20/2022 3:07PM
- Largest Contribution: 180.00
- Count of Contributions: 2

Tags

- Contact Type: Individual
- Contact ID: 387
- External ID:

Gender

- Date of Birth: February 2nd, 2006
- Age: 17 years

Employer: Mamma Mia Company

Job Title

Recognition Name

Source: CanadaHelps

Contributions subtab

4. Select **Add Contribution** on the top right corner of the screen

Wellness Avenue

Dashboard Contacts **Contributions** Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

Cara Miley

Actions Edit

Summary Contributions 2 Activities 8 Relationships 2 Groups 2 Notes 0 Tags 0 Opportunities

Contributions 2 DMS Recurring Contributions

Total - \$ 300.00 # Completed - 2 Avg - \$ 150.00

Click arrow to view payment details.

Add Contribution

Received	Amount	Fund	Campaign	Method	Method	Status	Receipt No.	Thanked
September 16th, 2022 10:21 AM	\$180.00	General Fund		DMS Manual	Cash	Completed	WELL00000800	✓
July 20th, 2022 03:07 PM	\$120.00	Peace Initiative	Monthly Giving Webinar	CanadaHelps	CH - Credit Card	Completed	R4165562	-

Contact profile > Add Contribution

5. Your Contact will be pre-selected. Fill out all mandatory and necessary fields on the New Contribution page and select **Save** or **Save and New**

DMS Payments

New Contribution

Save Save and New Cancel

CONTRIBUTOR *

Cara Miley

PAYMENT METHOD *

- select -

TRANSACTION ID

Enter transaction ID

TOTAL AMOUNT *

CAD (\$) \$ Enter amount

DATE RECEIVED *

03/01/2023 12:33PM

The date this contribution was received.

Select your desired Contact or refine your search

Modifying a Single Contribution

Reminder: You can fully modify offline Contributions (i.e., Contributions whose **Source** is not *CanadaHelps*).
But, at this time, you can only modify **select fields in CanadaHelps Contributions**.

1. Go to the **Contributions Tab** and search for the offline Contribution you wish to modify
2. Select the Contribution's **Amount** to see its Details

The screenshot shows the 'Contributions' tab in the Wellness Avenue system. The table lists several contributions with columns for Received, Name, Amount, Fund, Campaign, Source, Method, Status, Receipt No., and Thanked. The 'Amount' column is highlighted with a red box, and a tooltip at the bottom of the screen reads 'Select Contribution amount'.

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	Completed		
<input type="checkbox"/> March 1st, 2023 09:19 AM	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 type="checkbox"/> February 28th, 2023 06:30 PM	Nicole Lam	\$250.00	General Fund		DMS Manual	Cheque	Completed	WELL00000912	
<input type="checkbox"/> February 28th, 2023 03:40 PM	Lucas Froese	\$50.00	General Fund		DMS Manual	Cheque	Completed	WELL00000911	

3. On the Contribution Details page, select **Edit** on the top right corner of the screen

Wellness Avenue

Dashboard Contacts **Contributions** Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

Contributions from Tamara Rahmani

[Edit](#) [Issue Tax Receipt](#) [Cancel](#)

Contribution Details	
From	Tamara Rahmani
Fund	General Fund
Total Amount	\$150.00
Net Amount	\$150.00
Fee Amount	\$0.00
Advantage Amount	\$0.00
Description of advantage	-
Received	Mar 1st, 2023 12:32 PM
Received Into	Deposit Bank Account

[?](#)

Edit Contribution

4. You'll be able to **modify most fields** related to that Contribution, then select **Save**.

Wellness Avenue

Dashboard Contacts **Contributions** Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

[Save](#) [Save and New](#) [Cancel](#)

CONTRIBUTOR
Tamara Rahmani

TOTAL AMOUNT *

CAD (\$) 150.00

DATE RECEIVED *

03/01/2023 12:32PM
The date this contribution was received.

FUND *

General Fund

CH FUND

- select CH Fund -

CAMPAIGN

- select -

[?](#)

Edit Contribution details