

Adding a Single Live Transaction

Last Modified on 05/14/2024 11:07 am EDT

Donor Management System

Once you are fully signed up with our DMS Payment Processor, you can easily start processing live credit card and EFT (direct deposit) transactions.

-> **Learn more:** [Understanding Live Transactions \(DMS Payments\)](#)

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Adding Credit Card Transactions

From the Contributions Tab (Credit Card)

1. Go to the **Contributions Tab**
2. 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

Search by contributor name or email [Q] Advanced Search

Actions ▾ 0 Selected Records Only All 1430 Records

All Contributions ▾ Advanced Actions ▾ **Add Contribution**

<input type="checkbox"/>	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"/>	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	

Add Contribution

3. Next, select **DMS Payments Contribution** in the top right

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

DMS Payments

New Contribution Save Save and New Cancel

CONTRIBUTOR *
-select Contact-

PAYMENT METHOD *
-select-

TRANSACTION ID
Enter transaction ID

TOTAL AMOUNT *
CAD (\$) \$ Enter amount

DATE RECEIVED *
03/02/2023 10:52 AM
The date this contribution was received.

FUND *

DMS Payments Contribution

4. You will be directed to a similar page when adding a single Offline Contribution. On this Live Contribution page, you can fill out the **information about the Live Contribution, the Contact associated with it as well as their credit card and billing information:**

Process live credit card and EFT (direct deposit) transactions. You can process a single contribution or a recurring contribution and indicate if the gift is receiptable, any advantage amount, and more.

Save **Save and New** Cancel

Contributor *

Total Amount * \$ Enter amount

Fund *

Campaign

CH Fund

every month(s) for Installments

To make an ongoing donation with no end date, leave the number of installments blank.

Payment Method *

Credit Card



Card Number *

Security Code *

Expiration Date *

Billing Name and Address

Billing First Name *

Billing Middle Name

Billing Last Name *

Street Address *

City *

Country *

Province *

Postal Code *

Exclude From Tax Receipting

Contribution Note

▾ Dedication Information

▾ Additional Details

Save **Save and New** Cancel



Processing Live Transactions

Main Fields:

- **Contributor:** the Contact making this donation.
- **Total Amount:** the total monetary amount for this donation.
- **Fund:** the Fund this donation is going into.

Recurring Transaction Frequency:

- **every:** check this box to make this live transaction recurring.
- **1:** the default selection is “1”. This indicates that the recurring transactions will occur every 1 month.
- **month(s):** the default selection is monthly. You can also select to add automatic payments daily, weekly, and yearly.
- **for:** add a numerical value of how many months, years, etc. (depending on your previous selection) that these recurring transactions will occur.

Select Recurring Transaction Frequency

- **Start Date:** when the payments will start. You can only select a date from the time you’re adding this Online Contribution or a future one.
- **Campaign:** the Campaign associated with this donation.
- **Payment Processor:** the default is *Credit Card* but you can change it to *EFT*.

Credit Card & Billing Name and Address:

- The credit card and billing information of the Contact associated with this Online Contribution.

Contribution Details:

- **Contribution Receipted:** Check the box if a Tax Receipt for this Contribution has already been issued externally. Otherwise, you can leave the checkbox blank.
- **Contribution Note:** optional note for the whole Contribution.

In Kind donation fields

- **Address of Appraiser:** the full address of the Appraiser (55 character limit).
- **Appraised by:** who appraised this In Kind donation.
- **Description of property:** the description of the received Property (75 character limit).
- **Original cost:** the original cost of the received Property (55 character limit).

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

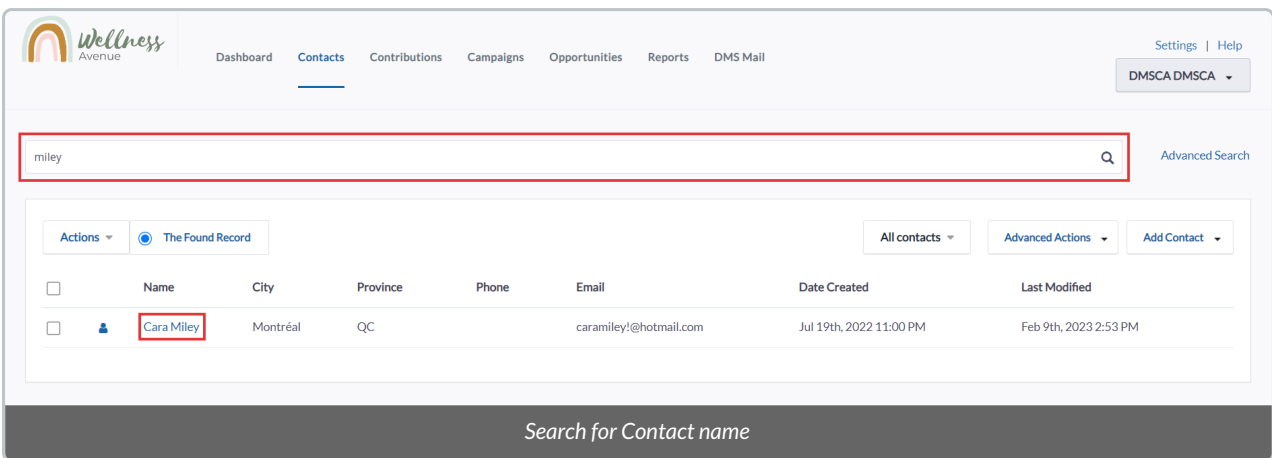
marked as **Thanked**.

5. Select **Save** to process and add the new Live Contribution or **Save And New** to process and add the Contribution and create a new one.

From a Contact Profile (Credit Card)

1. Go to the **Contacts Tab**

2. Search for the Contact to whom you'd like to add a credit card transaction and select their name

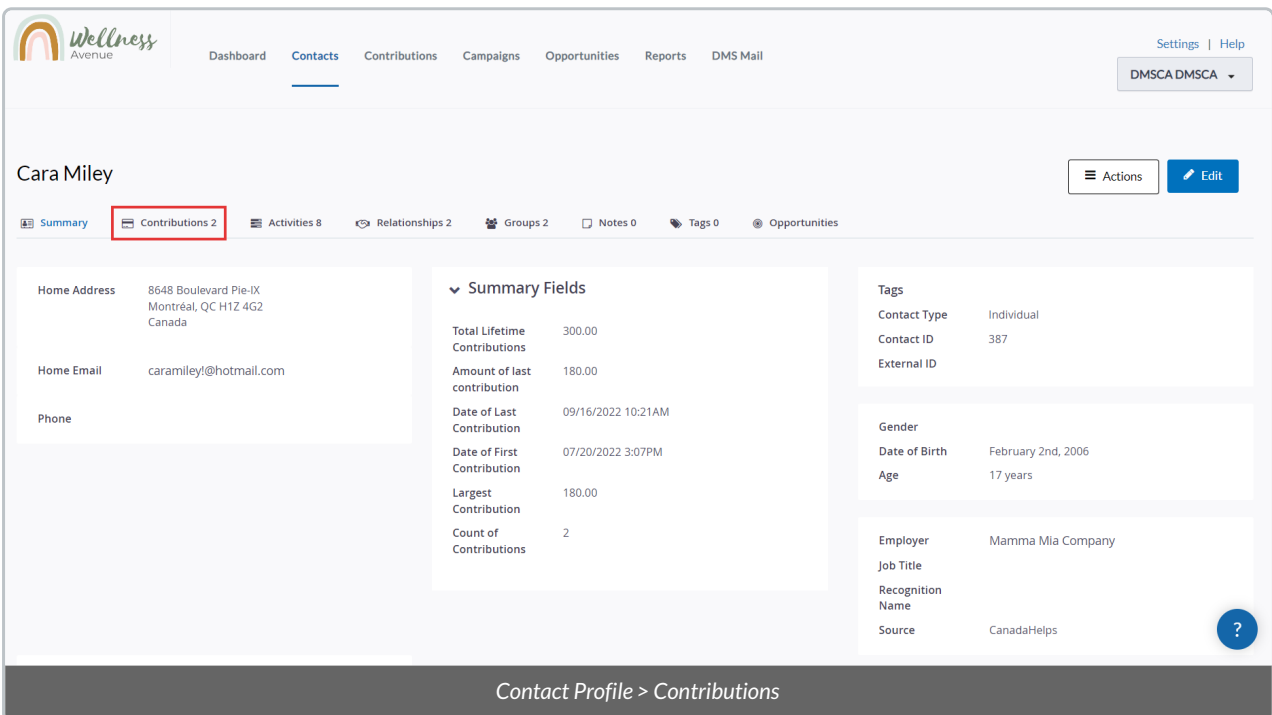


The screenshot shows the Wellness Avenue dashboard with the 'Contacts' tab selected. A search bar at the top contains the text 'miley'. Below the search bar, there are several filters and buttons: 'Actions', 'The Found Record', 'All contacts', 'Advanced Actions', and 'Add Contact'. A table of search results is displayed with the following columns: Name, City, Province, Phone, Email, Date Created, and Last Modified. The first row in the table is for 'Cara Miley', with 'Montréal' as the city and 'QC' as the province. The name 'Cara Miley' is highlighted with a red box.

	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 Contact name

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



The screenshot shows the Contact Profile for 'Cara Miley' with the 'Contributions' tab selected. The page displays contact information, summary fields, and tags. The 'Contributions' tab is highlighted with a red box.

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

Contact Profile > Contributions

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	-

Add Contribution

5. Next, select **DMS Payments Contribution** in the top right

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help
DMSCA DMSCA

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 *
03/02/2023 11:05AM
The date this contribution was received.

FUND *

Select DMS Payments

6. Fill out the information about the Live Contribution, the Contact associated with it and their credit card information:

Process live credit card and EFT (direct deposit) transactions. You can process a single contribution or a recurring contribution and indicate if the gift is receiptable, any advantage amount, and more.

Save Save and New Cancel

Contributor *
Cara Miley

Total Amount * CAD (\$)

Fund * - select -

Campaign - select -

CH Fund - select CH Fund -

every month(s) for Installments

To make an ongoing donation with no end date, leave the number of installments blank.

Payment Method * Credit card

Credit Card



Card Number *

Security Code *

Expiration Date * -month- -year-

Billing Name and Address ←

Billing First Name *

Billing Middle Name

Billing Last Name *

Street Address *

City *

Country * Canada

Province * Quebec

Postal Code *

Exclude From Tax Receipting

Contribution Note

∨ Dedication Information

∨ Additional Details

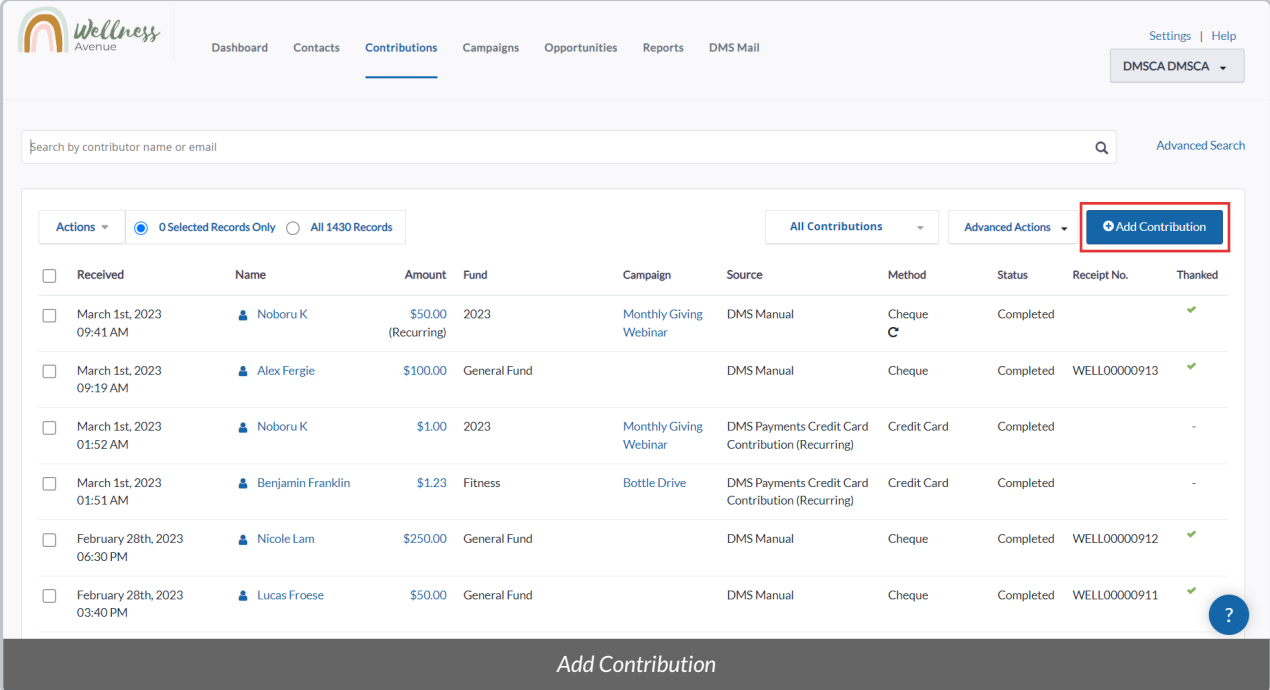
Note: If there is a billing address saved for the Contact, this billing address will be prefilled when adding a Live Contribution from the Contact's Profile.

Adding EFT Transactions

Important: EFT Live Transactions will withdraw a certain amount from your donor's bank account. **The Government of Canada requires that you set up a Pre-authorized debit agreement (PAD) with your donor before doing so.**

From the Contributions Tab (EFT)

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



The screenshot shows the 'Contributions' tab in the Wellness Avenue system. The 'Add Contribution' button is highlighted with a red box. Below the button is a table of contributions.

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. Next, select **DMS Payments Contribution** in the top right

The screenshot shows the 'New Contribution' form in the Wellness Avenue system. The form is titled 'New Contribution' and has three buttons: 'Save', 'Save and New', and 'Cancel'. A red box highlights the 'DMS Payments' button. The form fields are as follows:

- CONTRIBUTOR ***: A dropdown menu with the text '-select Contact -'.
- PAYMENT METHOD ***: A dropdown menu with the text '-select -'.
- TRANSACTION ID**: A text input field with the placeholder text 'Enter transaction ID'.
- TOTAL AMOUNT ***: A dropdown menu with 'CAD(\$)' and a text input field with the placeholder text '\$ Enter amount'.
- DATE RECEIVED ***: A date input field with '03/02/2023' and a time input field with '10:52AM'. Below the date field is the text 'The date this contribution was received.'
- FUND ***: A dropdown menu.

A dark banner at the bottom of the form contains the text 'Credit card contribution'. A blue question mark icon is visible in the bottom right corner of the form area.

4. You will be directed to a similar page when adding a single Offline Contribution. On this form, you can fill out the information about the Live Contribution, the Contact associated with it as well as their direct deposit information

5. Under **Payment Method**, choose **EFT** and you will see the following fields:

Wellness Avenue

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

Settings | Help

DMSCA DMSCA

Process live credit card and EFT (direct deposit) transactions. You can process a single contribution or a recurring contribution and indicate if the gift is receiptable, any advantage amount, and more.

Save Save and New Cancel

Contributor * -select Contact -

Total Amount * \$ Enter amount

Fund * -select -

Campaign -select -

CH Fund -select CH Fund -

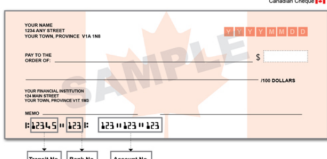
every [] month(s) for [] Installments

To make an ongoing donation with no end date, leave the number of Installments blank.

Payment Method * EFT

Direct Debit

You can find your Transit number, Bank number and Account number by inspecting a cheque.



Canadian Cheque #14

YOUR NAME
100 MAIN STREET
YOUR TOWN, PROVINCE, VIA 1M

PAID TO THE
ORDER OF \$

YOUR RECEIVING INSTITUTION
123 MAIN STREET
YOUR TOWN, PROVINCE, V1V 1V1

MEMO

@2345 @123 @123 @123

Transit No. Bank No. Account No.

Please enter them below without any punctuation or spaces.

Transit Number (5 Digits)

Bank Number (3 Digits) *

Bank Account Number *

Account Holder *

Bank Name *

Account Type * Chequing

Billing Name and Address

Billing First Name *

Billing Middle Name

Billing Last Name *

Street Address *

City *

Country * Canada

Province * -select Province -

Postal Code *

Exclude From Tax Receiving Contribution Note

~ Dedication Information

~ Additional Details

Save Save and New Cancel

Processing EFT contributions

Main Fields:

- **Contributor:** the Contact making this donation.
- **Total Amount:** the total monetary amount for this donation.
- **Fund:** the Fund this donation is going into.

Recurring Transaction Frequency:

- **every:** check this box to make this live transaction recurring.
- **1:** the default selection is “1”. This indicates that the recurring transactions will occur every 1 month.
- **month(s):** the default selection is monthly. You can also select to add automatic payments daily, weekly, and yearly.
- **for:** add a numerical value of how many months, years, etc. (depending on your previous selection) that these recurring transactions will occur.

Select Recurring Transaction Frequency

- **Start Date:** when the payments will start. You can only select a date from the time you’re adding this Online Contribution or a future one.
- **Campaign:** the Campaign associated with this donation.
- **Payment Method:** the default is *iATS Credit Card* but you can change it to *EFT*.

Direct Debit & Billing Name and Address:

- The direct deposit and billing information of the Contact associated with this Live Contribution.

Contribution Details:

- **Contribution Receipted:** Check the box if a Tax Receipt for this Contribution has already been issued externally. Otherwise, you can leave the checkbox blank.
- **Contribution Note:** optional note for the whole Contribution.

In Kind donation fields:

- **Address of Appraiser:** the full address of the Appraiser (55 character limit).
- **Appraised by:** who appraised this In Kind donation.
- **Description of property:** the description of the received Property (75 character limit).
- **Original cost:** the original cost of the received Property (55 character limit).

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

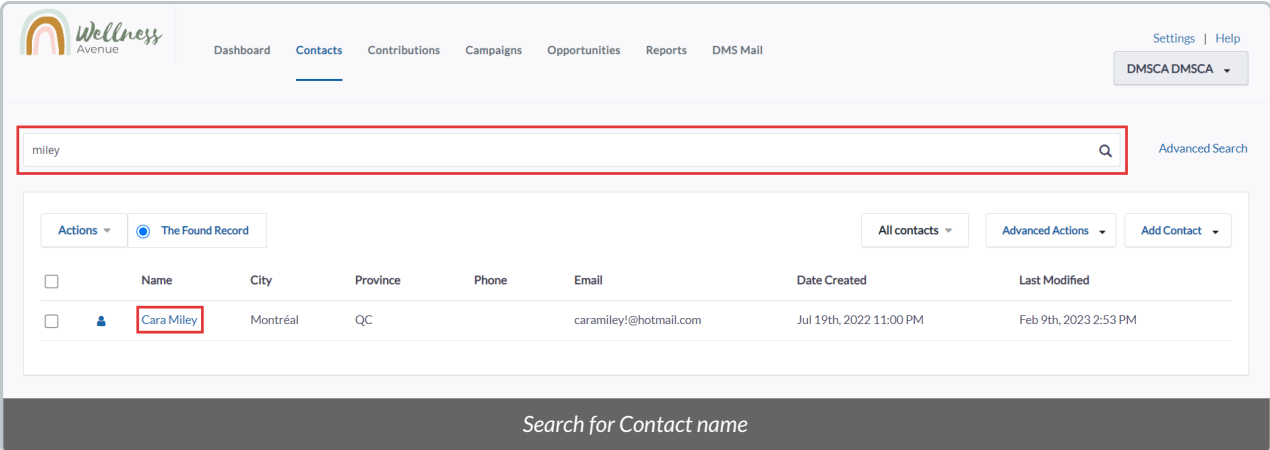
marked as **Thanked**.

6. Select **Save** to process and add the new Live Contribution or **Save And New** to process and add the Contribution and create a new one.

From a Contact Profile (EFT)

1. Go to the **Contacts Tab**

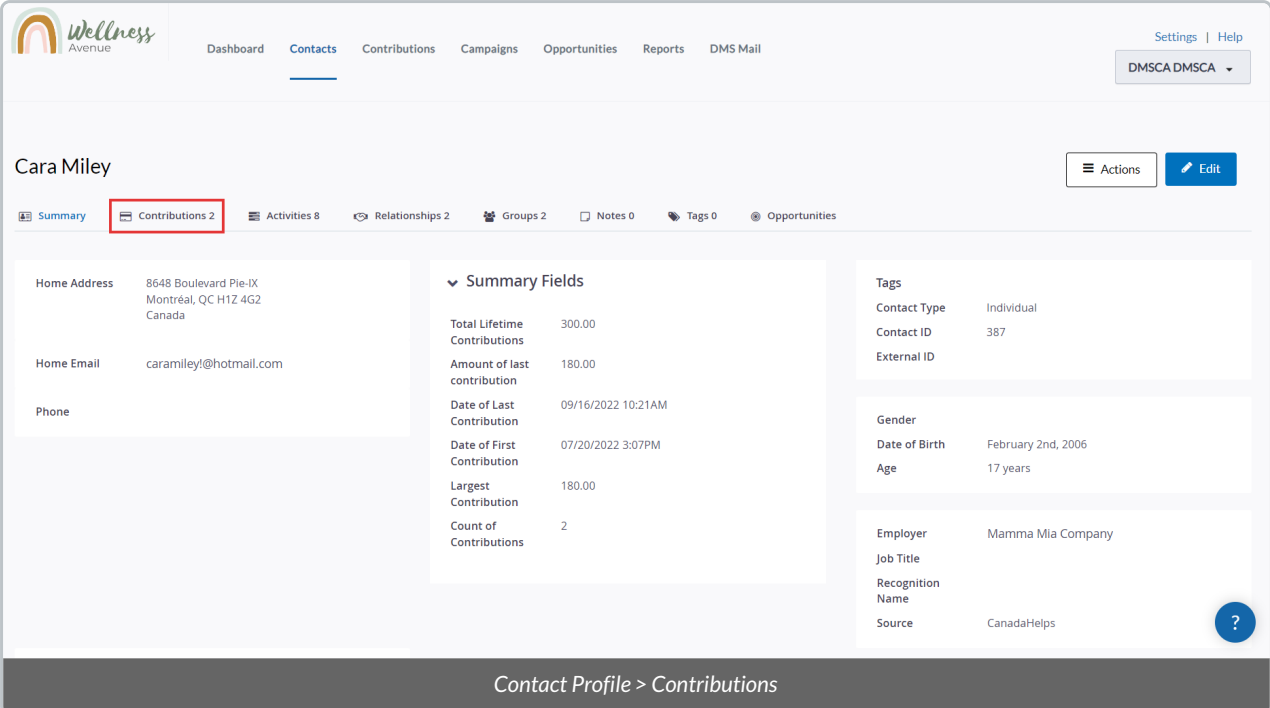
2. Search for the Contact for whom you'd like to add a credit card details and select their name



The screenshot shows the Wellness Avenue web application interface. The top navigation bar includes 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. A search bar at the top left contains the text 'miley'. Below the search bar, there are buttons for 'All contacts', 'Advanced Actions', and 'Add Contact'. A table of search results is displayed with the following columns: Name, City, Province, Phone, Email, Date Created, and Last Modified. The first result is 'Cara Miley' from Montréal, QC, with email 'caramiley@hotmail.com'. A red box highlights the search bar and the 'Cara Miley' entry in the table.

Name	City	Province	Phone	Email	Date Created	Last Modified
Cara Miley	Montréal	QC		caramiley@hotmail.com	Jul 19th, 2022 11:00 PM	Feb 9th, 2023 2:53 PM

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



The screenshot shows the Contact Profile page for 'Cara Miley'. The top navigation bar is the same as in the previous screenshot. The page title is 'Cara Miley'. Below the title, there are tabs for 'Summary', 'Contributions 2', 'Activities 8', 'Relationships 2', 'Groups 2', 'Notes 0', 'Tags 0', and 'Opportunities'. The 'Contributions 2' tab is selected and highlighted with a red box. The main content area is divided into three sections: 'Home Address' (8648 Boulevard Pie-IX, Montréal, QC H1Z 4G2, Canada), 'Home Email' (caramiley@hotmail.com), and 'Phone'. The 'Summary Fields' section displays the following data: 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, and Count of Contributions: 2. The 'Tags' section shows 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, and Source: CanadaHelps. A red box highlights the 'Contributions 2' tab.

4. Select **Add Contribution** in 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	-

Add Contribution

5. Next, select **DMS Payments Contribution** in the top right

Wellness Avenue

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

Settings | Help
DMSCA DMSCA

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 *
03/02/2023 11:05AM
The date this contribution was received.

FUND *

DMS Payments Contribution

4. You will be directed to a similar page when adding a single Offline Contribution. Under **Payment Method**, select **EFT**.

5. Fill out the information about the Live Contribution, the Contact associated with it and their direct deposit information.

Wellness Avenue

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

Settings | Help

DMSCADMSCA

Process five credit card and EFT direct deposit transactions. You can process a single contribution or a recurring contribution and indicate if the gift is receiptable, any advantage amount, and more.

Save Save and Now Cancel

Contributor * Cara Miley

Total Amount * \$ Enter amount

Fund * - select -

Campaign - select -

CH Fund - select CH Fund -

every monthly for Installments

To make an ongoing donation with no end date, leave the number of installments blank.

Payment Method * EFT

Direct Debit

You can find your Transit number, Bank number and Account number by inspecting a cheque.

Canadian Cheque

YOUR NAME
YOUR BANK PREFIX (5-14)
YOUR BANK
YOUR ACCOUNT NUMBER (8-16)
\$
100 DOLLARS

Transit No. Bank No. Account No.

Please enter them below without any punctuation or spaces.

Transit Number (5 Digits)

Bank Number (3 Digits)

Bank Account Number *

Account Holder *

Bank Name *

Account Type * Chequing

Billing Name and Address

Billing First Name * Cara

Billing Middle Name

Billing Last Name * Miley

Street Address * 8648 Boulevard Pie-IX

City * Montreal

Country * Canada

Province * Quebec

Postal Code * H1Z 4G2

Exclude From Tax Receipting Contribution Note

~ Dedication Information

~ Additional Details

Save Save and Now Cancel

Processing EFT Payments

Note: If there is a billing address saved for the Contact, this billing address will be prefilled when adding a Live Contribution from the Contact's Profile.

Errors or Failed Payments

If you receive an error or failed payment when adding a live transaction, make sure that:

- The Contact has a mailing address in their Contact profile
- The donor's credit card is not expired
- The previous payment has a **"Completed"** status

Otherwise, reach out to your Onboarding Expert for additional support.

Next Steps

Once you've added a Live Transaction successfully, you may want to check out how to [update a Contact's Recurring DMS Payments](#), or take a look at how to [change your Payment Processor password in the DMS](#)