Adding a Single Live Transaction

Last Modified on 10/15/2025 3:05 pm EDT

Donor Management System

You can use the DMS Payment Processor to easily process live credit card and EFT (direct deposit) transactions.

–> Learn more: Understanding Live Transactions (DMS Payments)

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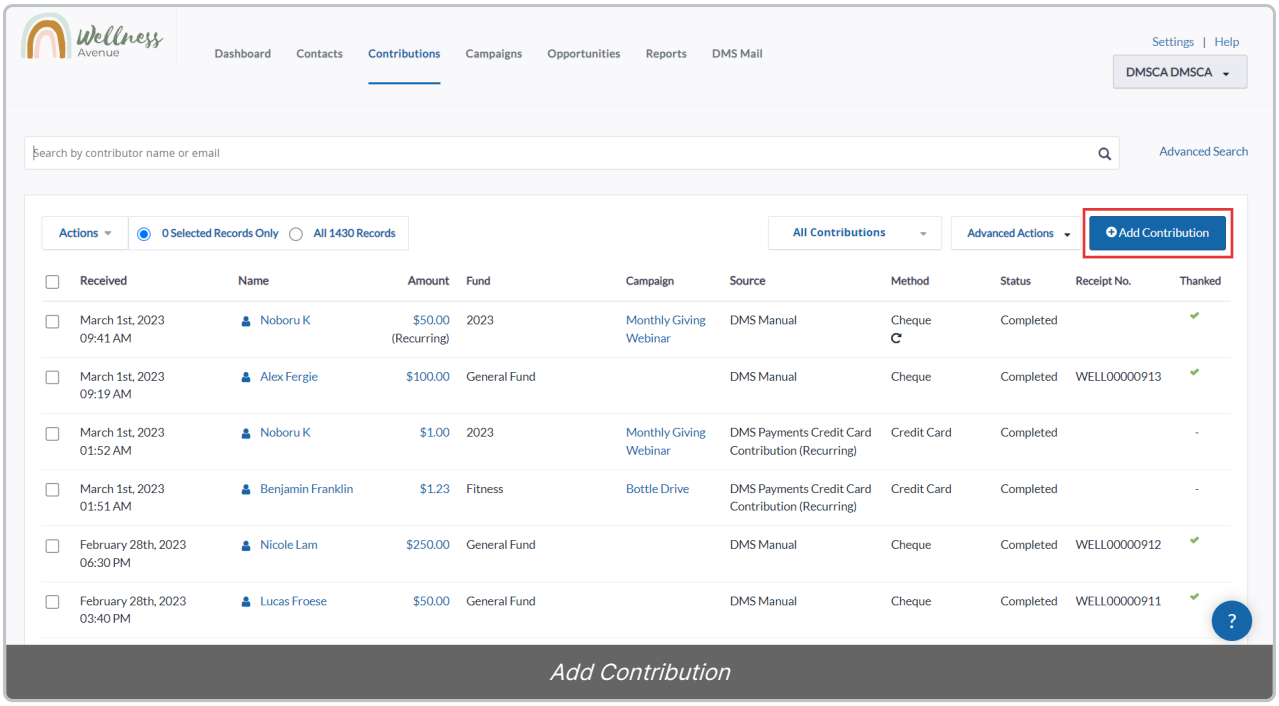
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Adding Credit Card Transactions

From the Contributions Tab (Credit Card)

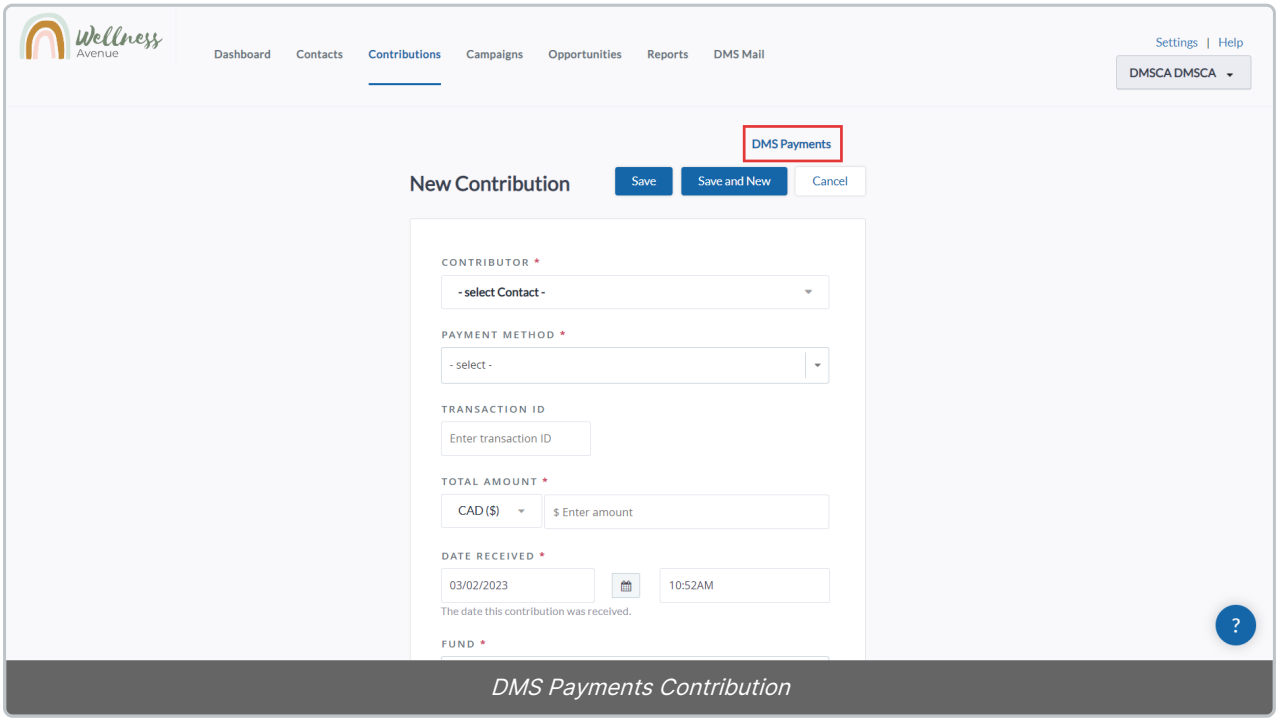
1. Go to the **Contributions Tab**

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



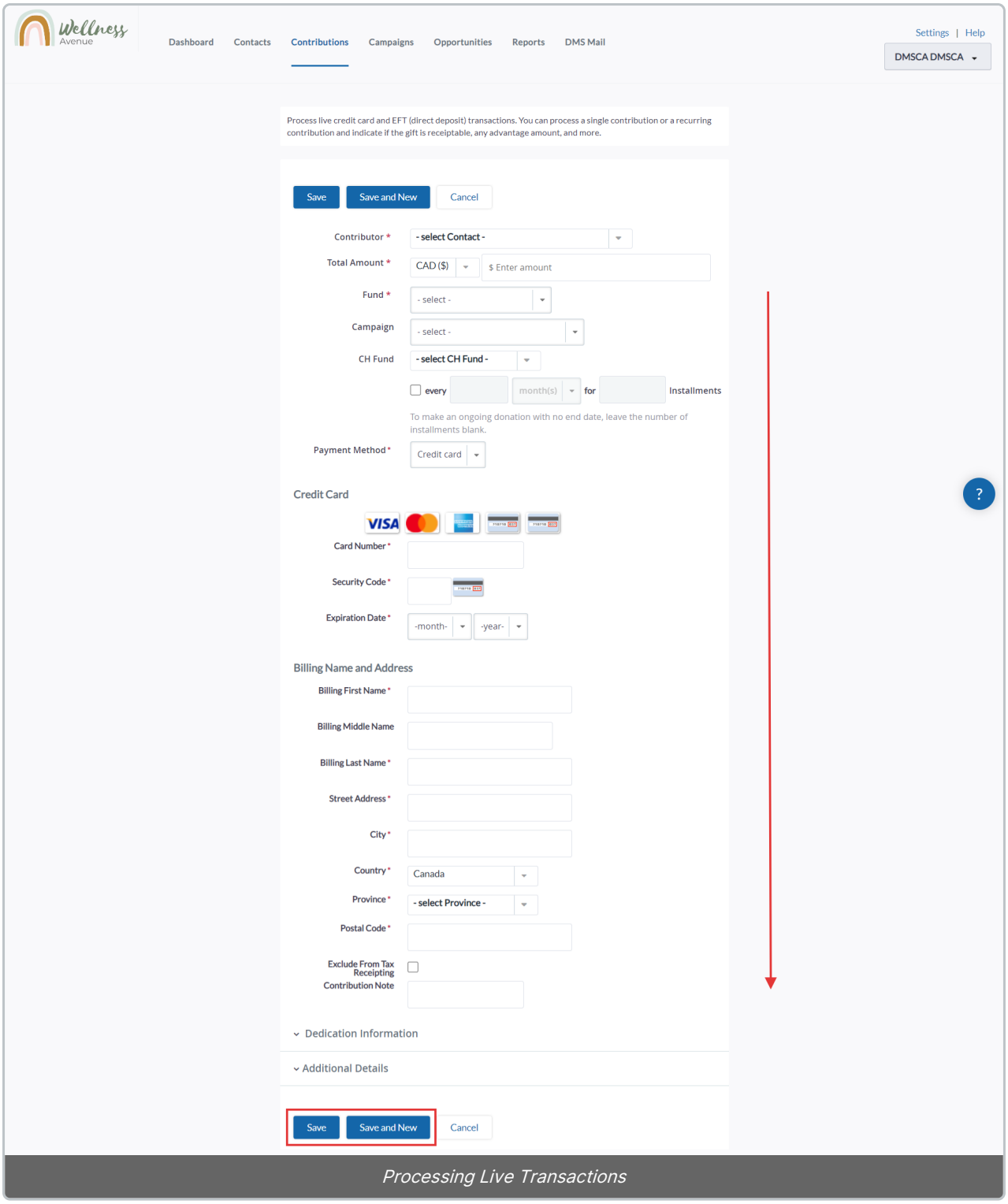
Add Contribution

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



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:**



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)

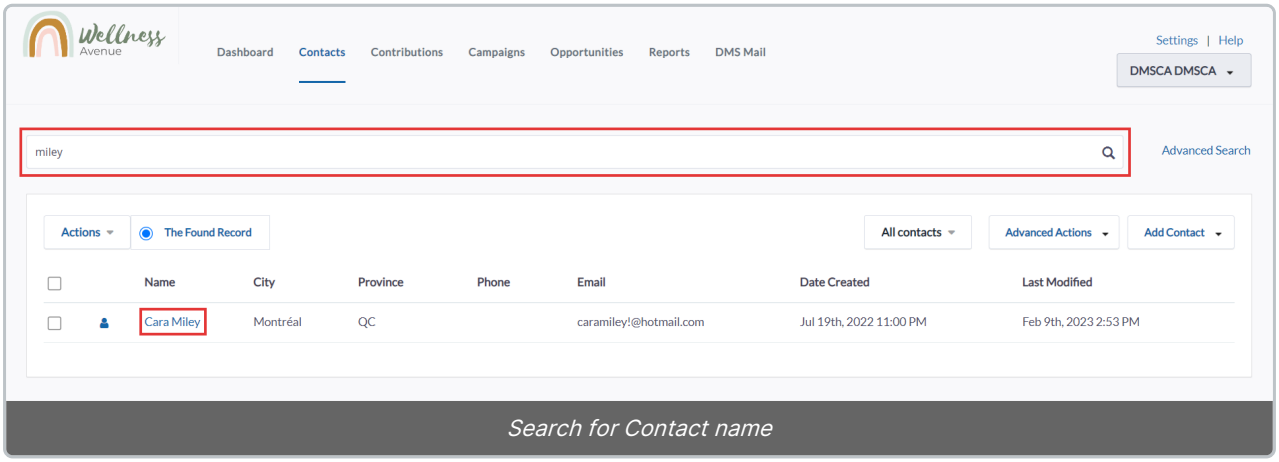
- ***Thank-you Date:*** the date and time that this donation has been thanked. The Contribution will be marked as ***Thanked***.

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)

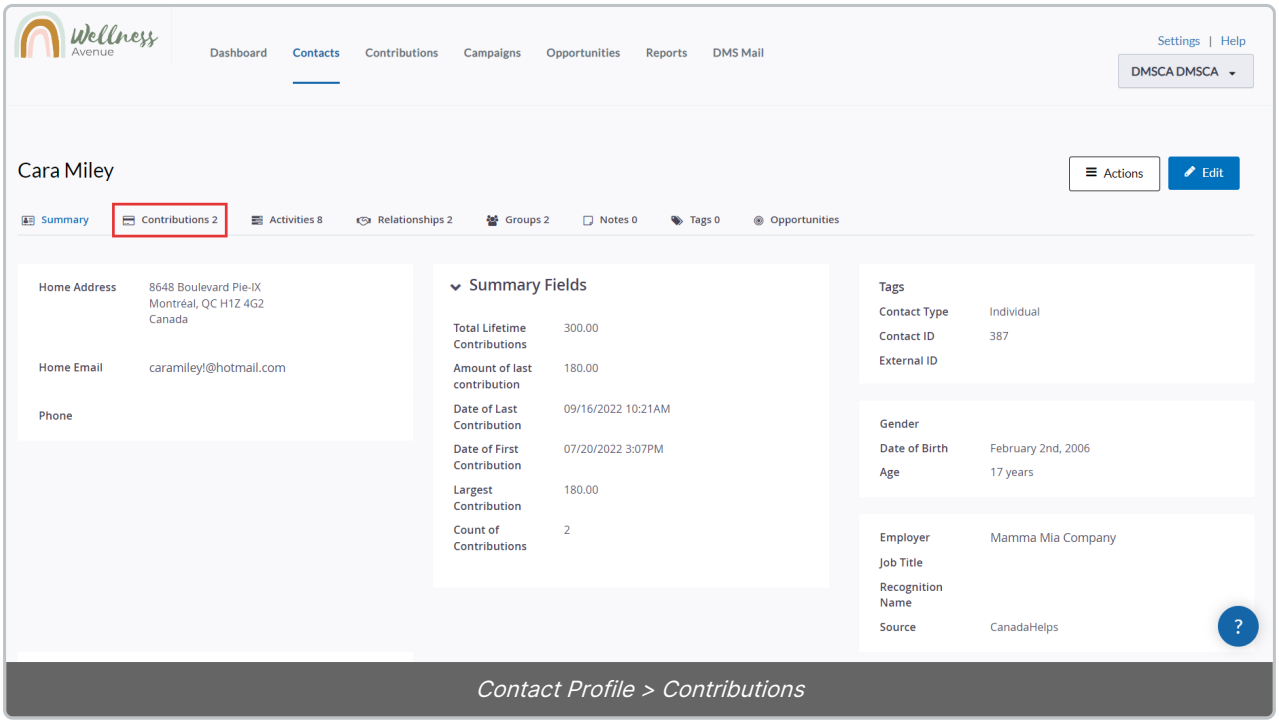
1. Go to the **Contacts Tab**

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



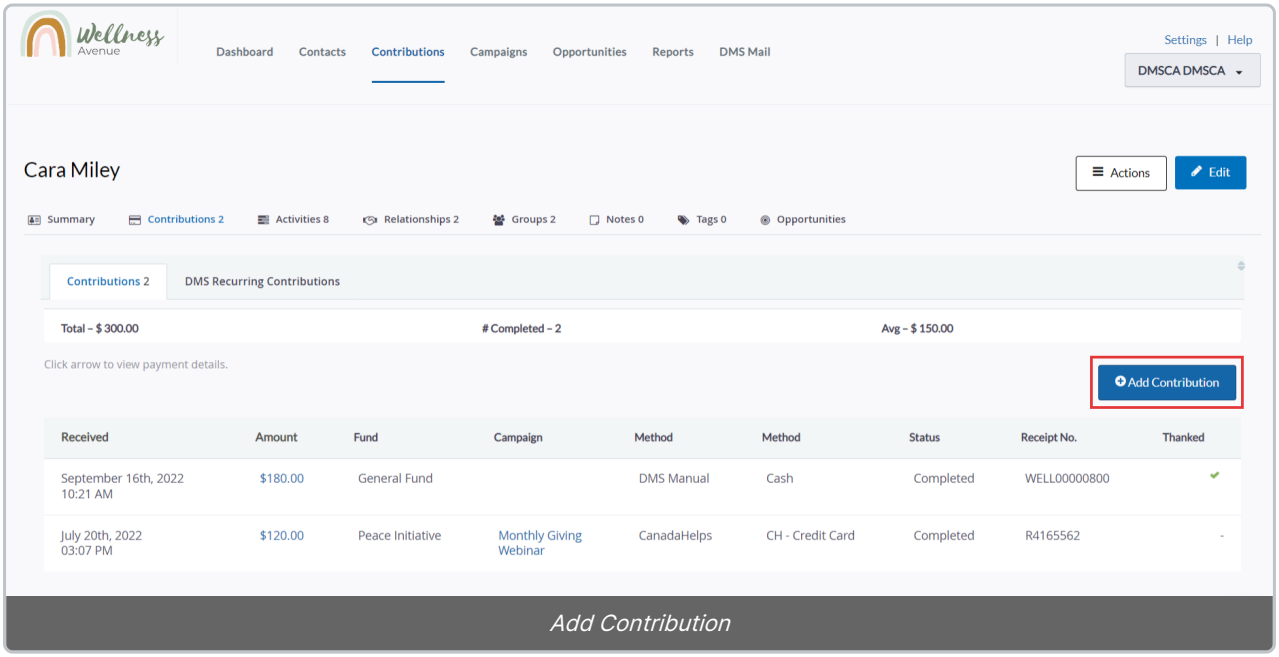
Search for Contact name

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



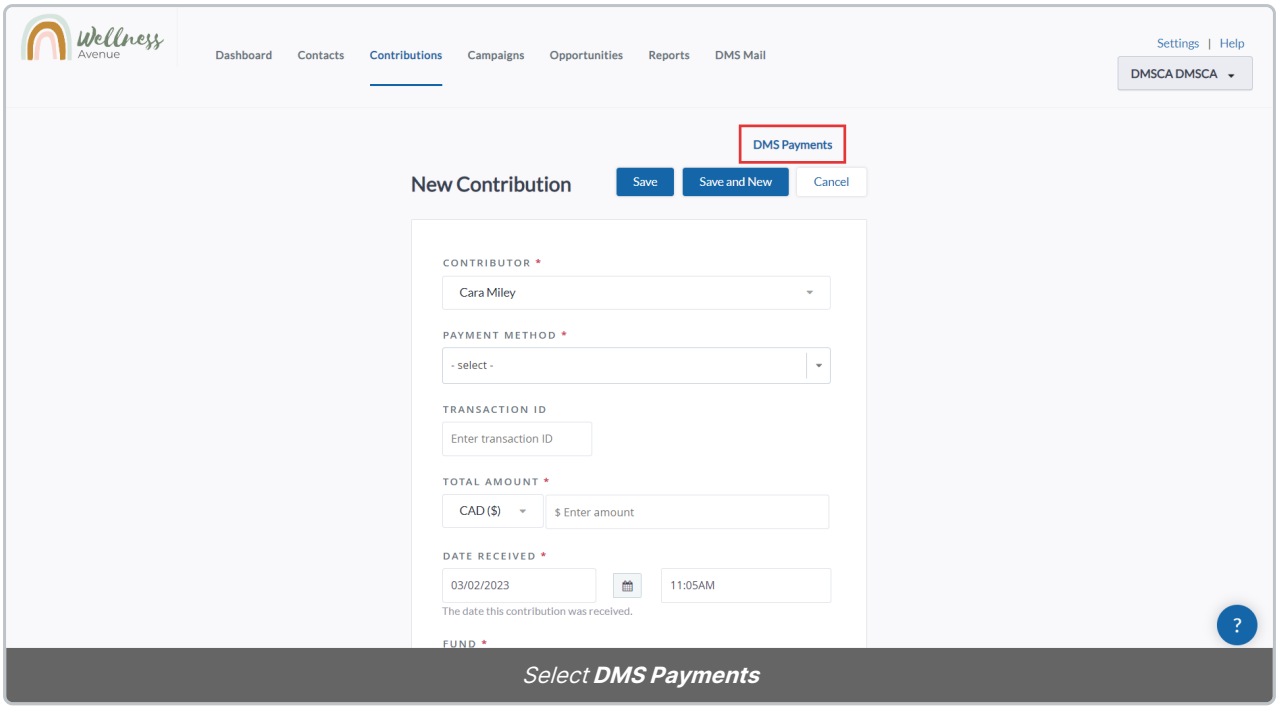
Contact Profile > Contributions

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



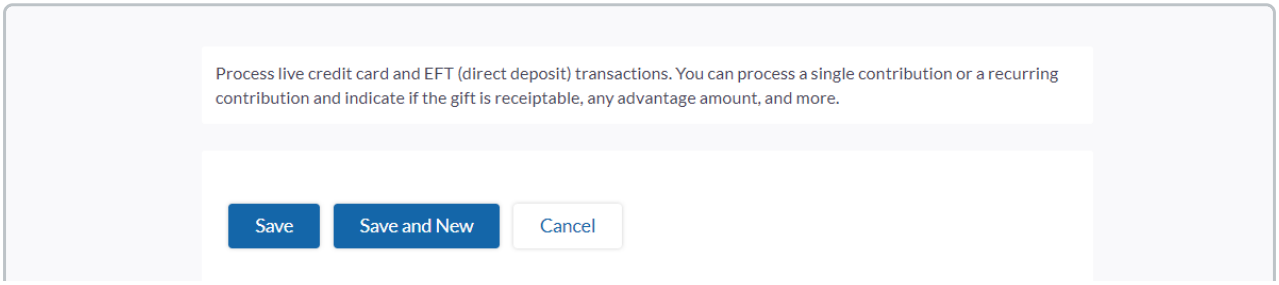
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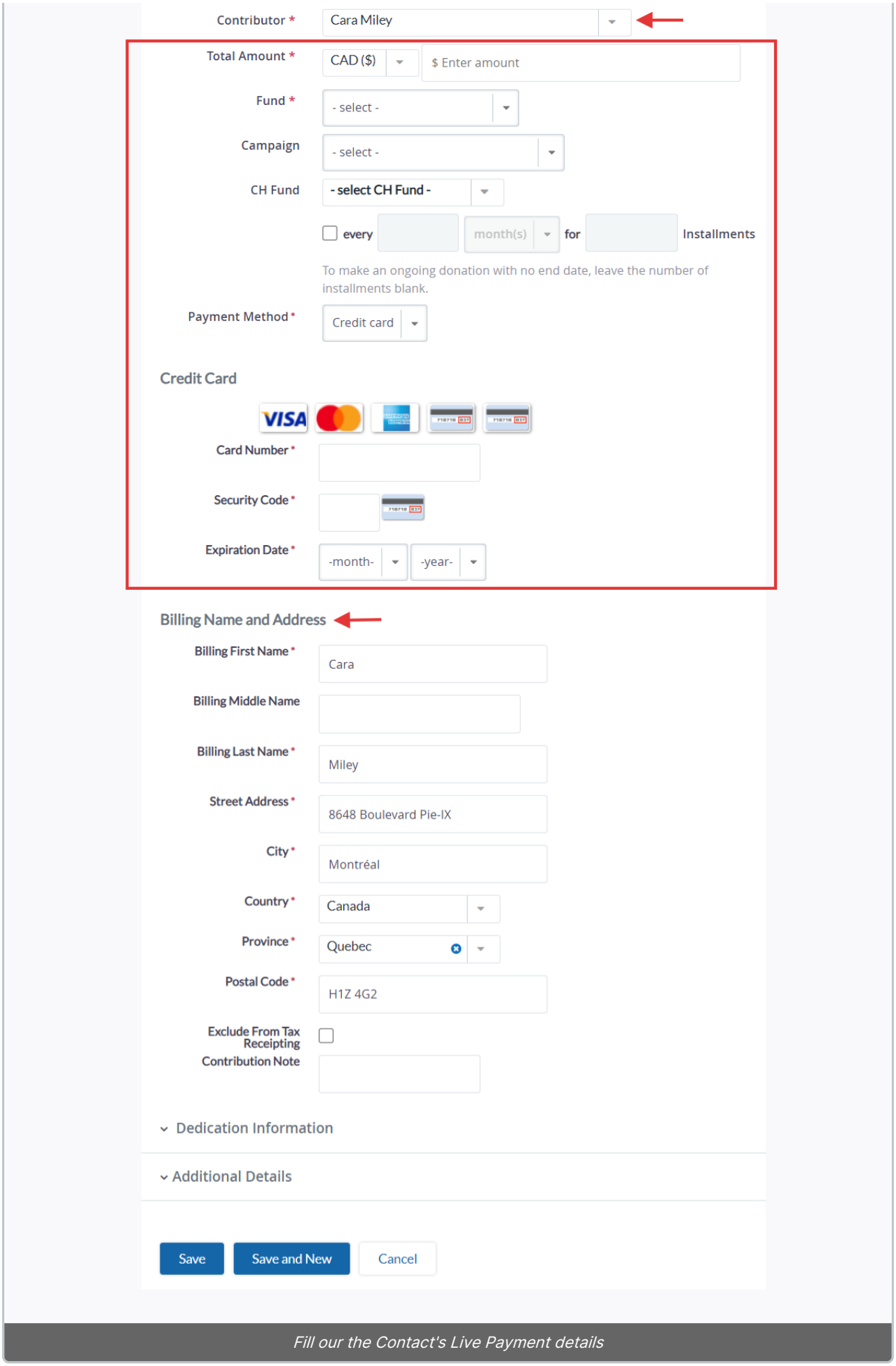
5. Next, select ***DMS Payments Contribution*** in the top right



*Select **DMS Payments***

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





Fill our the Contact's Live Payment 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.

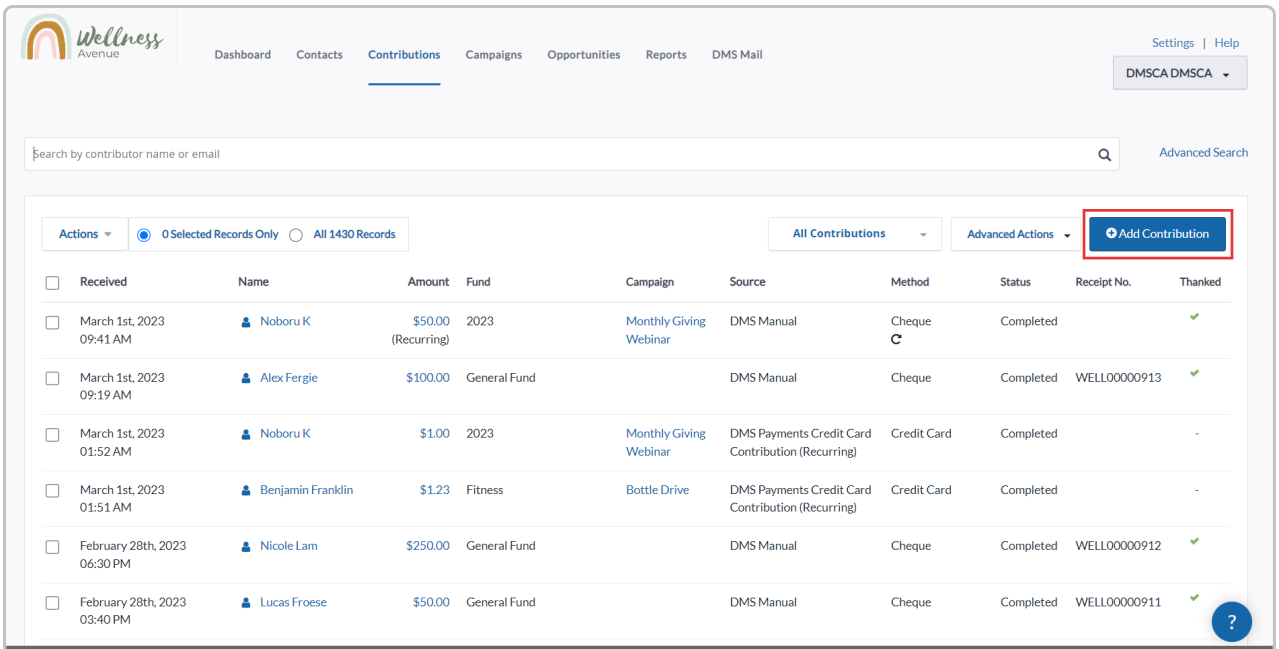
Adding EFT Transactions

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)

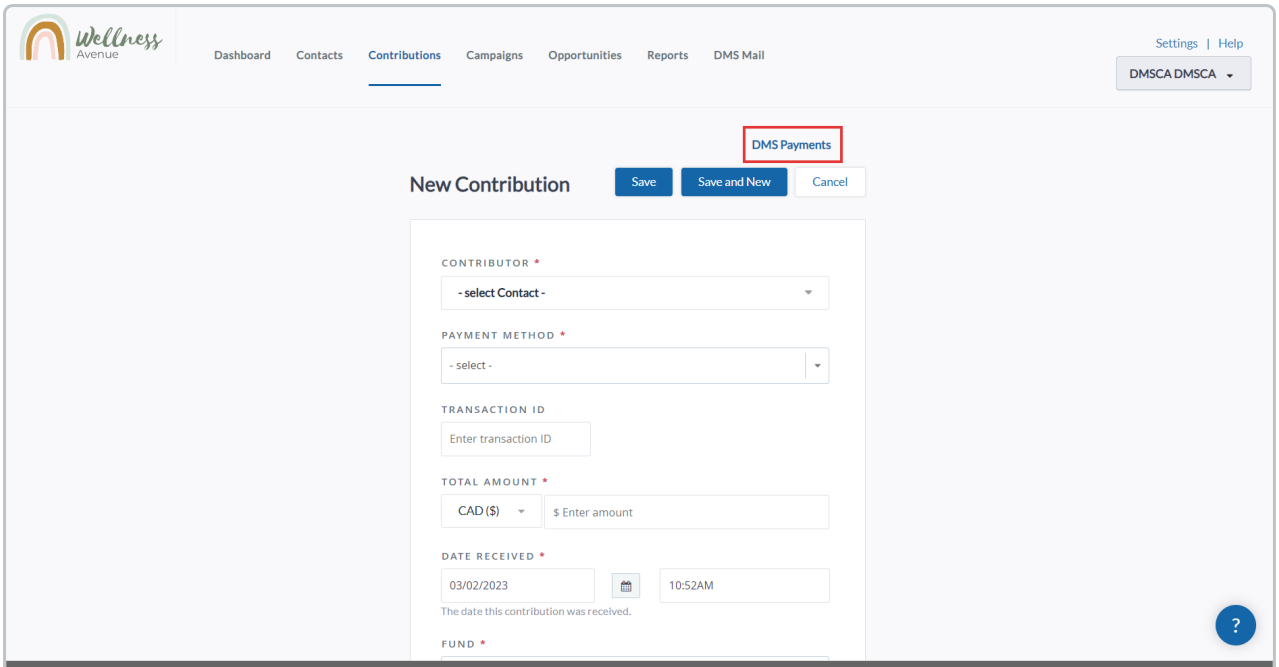
1. Go to the **Contributions Tab**

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Add Contribution

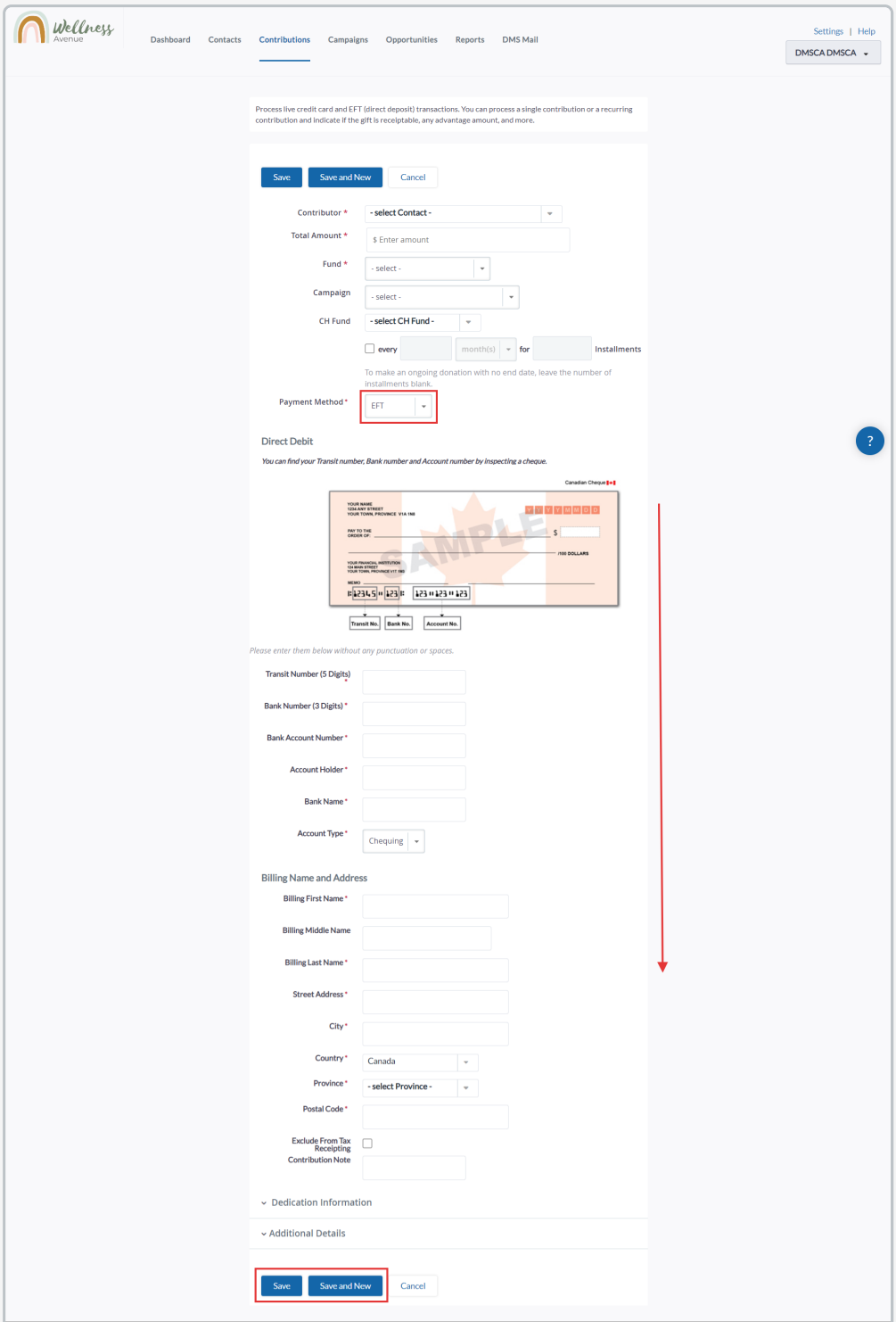
3. Next, select ***DMS Payments Contribution*** in the top right



Credit card contribution

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:



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:

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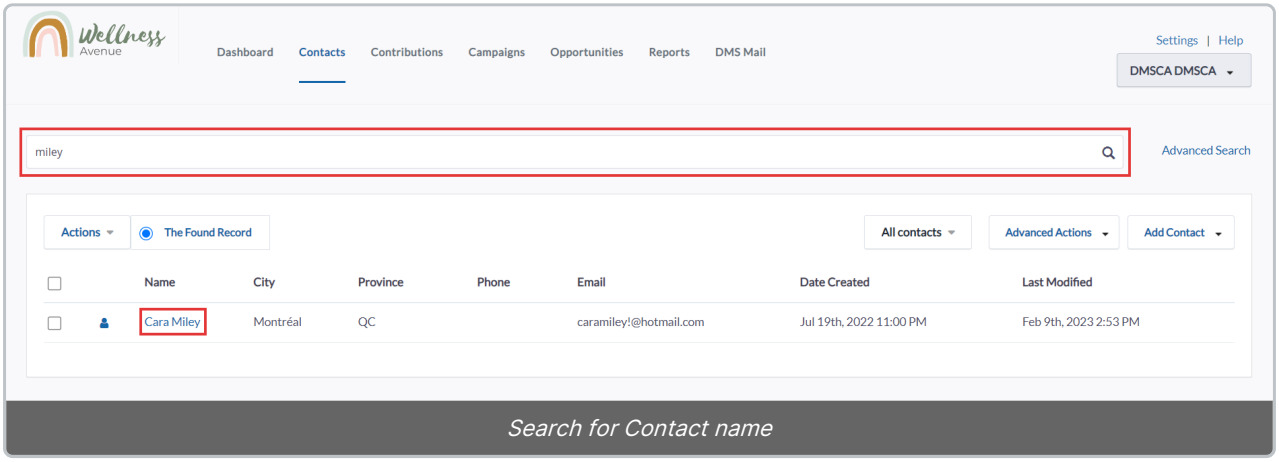
- ***Thank-you Date:*** the date and time that this donation has been thanked. The Contribution will be marked as ***Thanked***.

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)

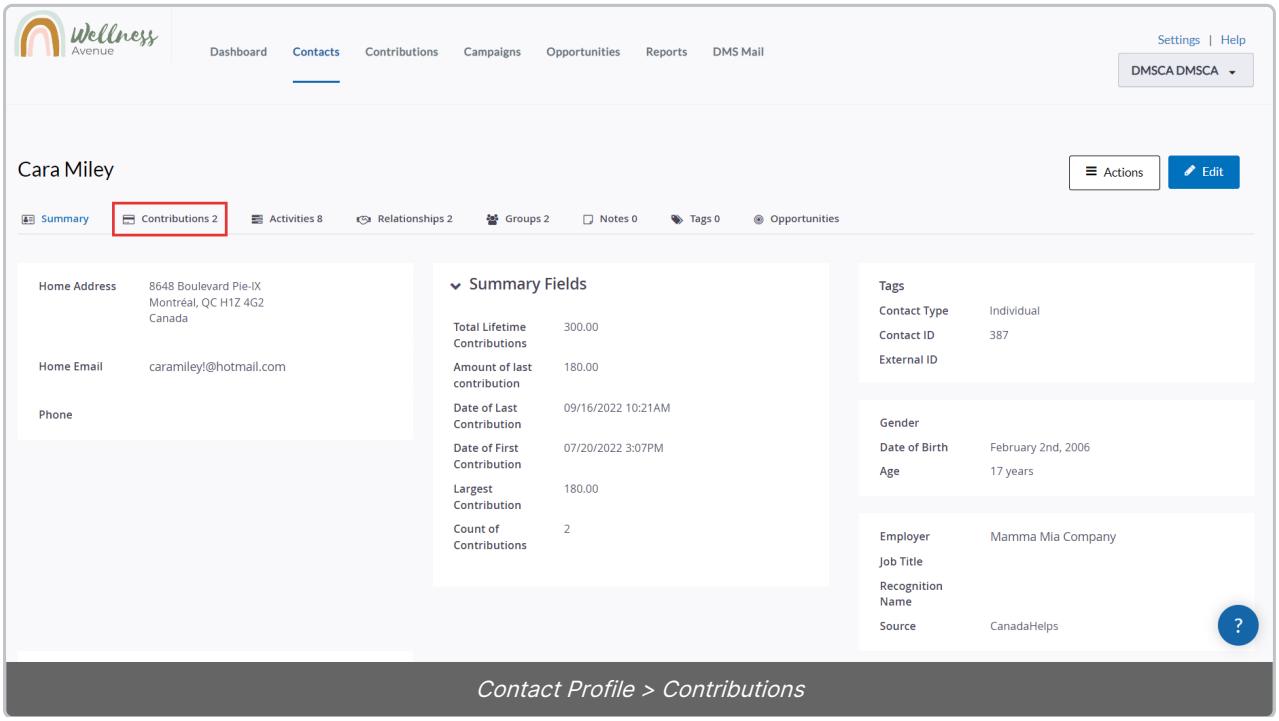
1. Go to the **Contacts Tab**

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



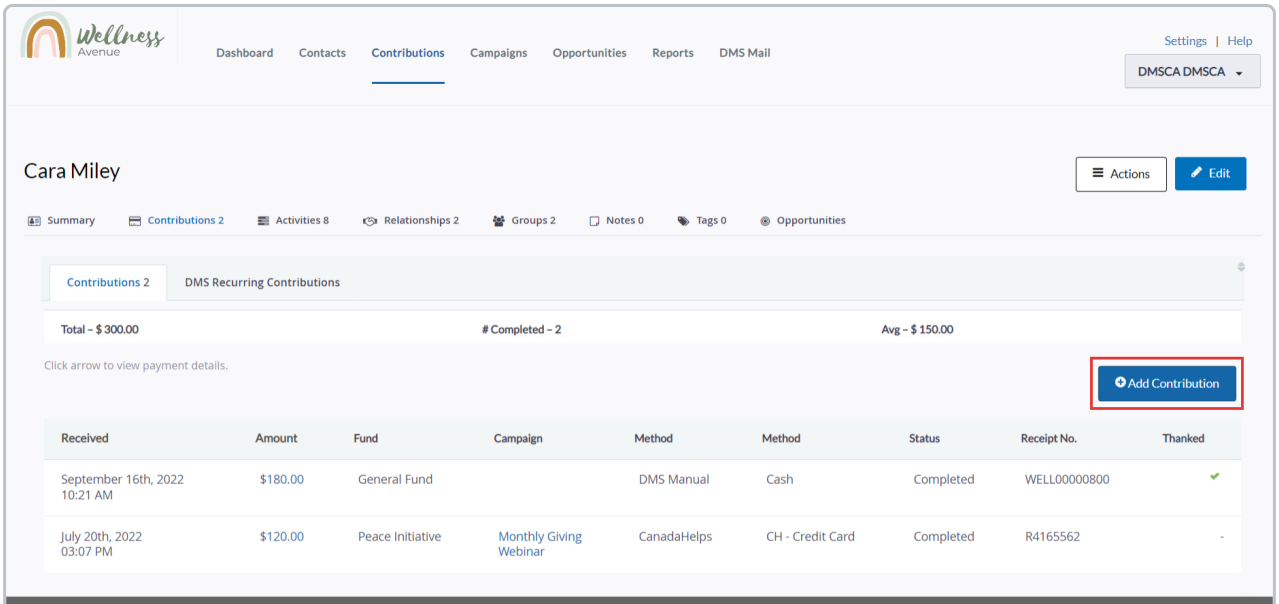
Search for Contact name

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



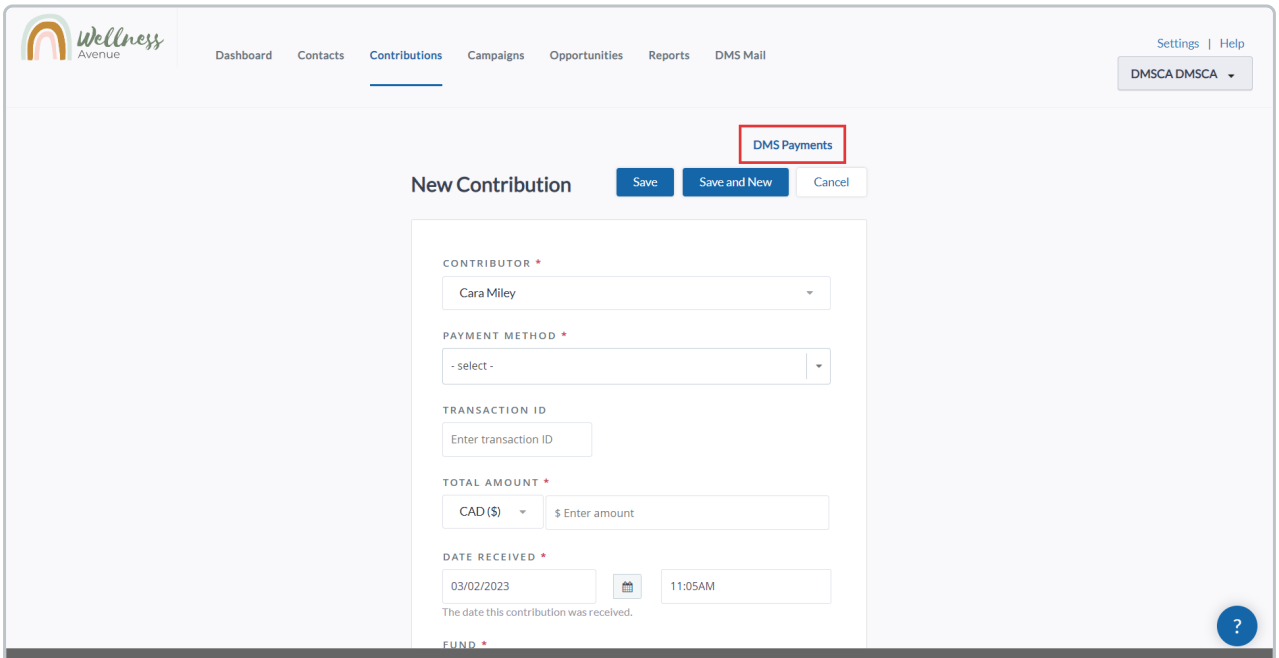
Contact Profile > Contributions

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



Add Contribution

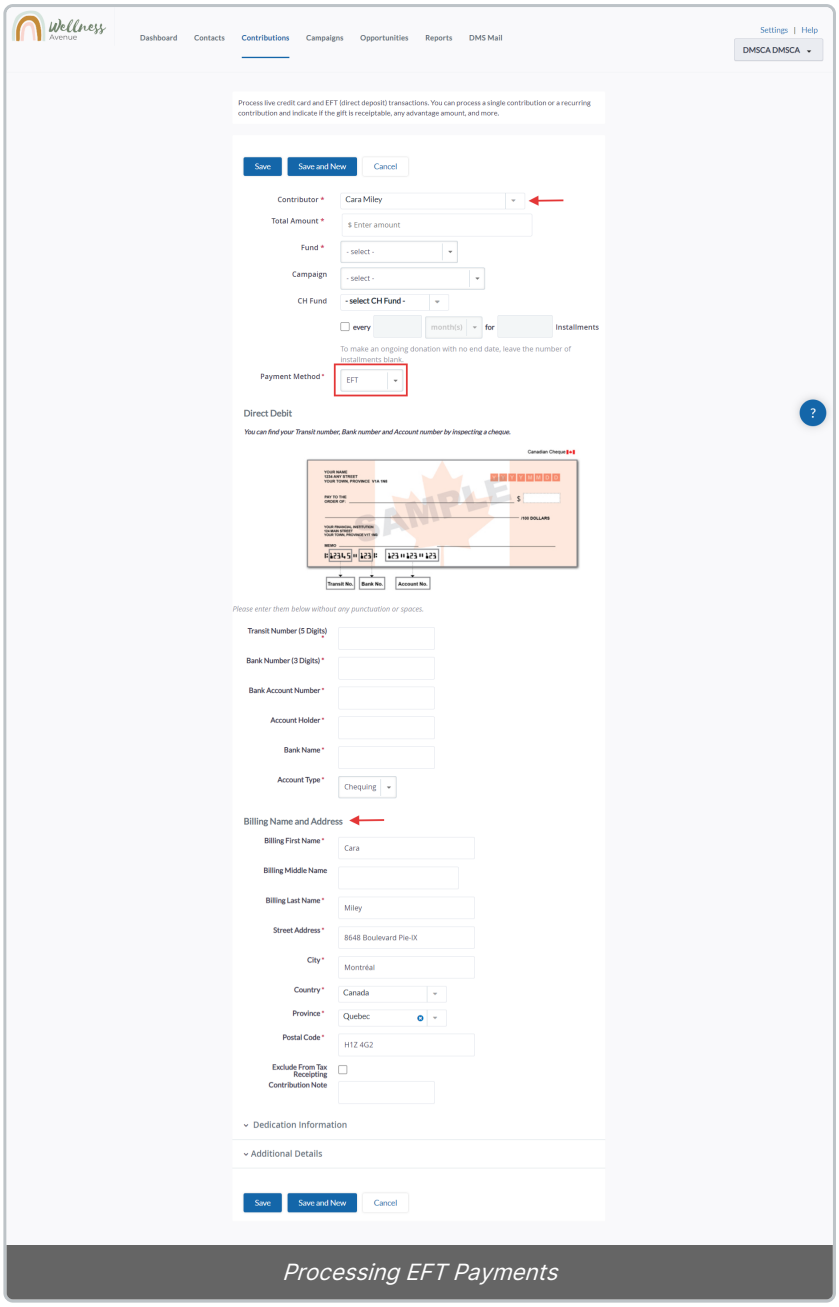
5. Next, select ***DMS Payments Contribution*** in the top right



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.**



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.