

Excluding a Single Contribution from Receipting

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Donor Management System

You can easily exclude your Offline Contributions from being receipted in the DMS when **adding** or **modifying** them.

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When Adding a Single Contribution

1. Visit the **Contributions** tab.
2. Select **Add Contribution** on the top right.

The screenshot displays the 'Contributions' tab in the Donor Management System. The interface includes a navigation menu with 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. A search bar is located at the top, and a dropdown menu shows 'DMSCA DMSCA'. The main content area features a table of contributions with columns for 'Received', 'Name', 'Amount', 'Fund', 'Campaign', 'Source', 'Method', 'Status', 'Receipt No.', and 'Thanked'. The 'Add Contribution' button is highlighted with a red box. A footer bar contains the text 'Select Add Contribution'.

| 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. After filling out all the necessary information, select the **Contribution Details** subsection to reveal it.

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 *
03/06/2023 04:29PM
The date this contribution was received.

FUND *
-select-

CAMPAIGN
-select-

SOURCE + Add New Source
DMS Manual

CONTRIBUTION STATUS
Completed

Additional info

Contribution Details

Dedication Information

Additional Details

Save Save and New Cancel

Fill out all the necessary fields and open the **Contribution Details** section

4. Use the following checkboxes, depending on the type of Contribution:

- If the Contribution is not eligible for a Tax Receipt (**non-charitable gift**): Select the checkbox on **Exclude from Tax Receipting**. You will not be able to issue a Tax Receipt for this Contribution and will be marked as ineligible.
- If the Contribution is eligible for a Tax Receipt **AND** has already been issued a Tax Receipt **externally**: Select the checkbox on **Contribution Received** and fill in the **Receipt Number** issued. You will not be able to issue a Tax Receipt for this Contribution in the DMS.

^ **Contribution Details**

EXCLUDE FROM TAX RECEIPTING ?

CONTRIBUTION RECEIPTED

RECEIPT NUMBER

CONTRIBUTION NOTE

MARK CONTRIBUTION AS RECURRING

Select Exclude from Tax Receipting OR Contribution Received

5. When ready, select **Save**.

6. Regardless of using the **Exclude from Tax Receipting** or **Contribution Received** fields, under the same Contribution's [Detail Page](#), you will see the **Not Eligible For Receipt** flag at the top, instead of *Issue Tax Receipt*.

Contributions from Alex Fergie

[Edit](#) **Not Eligible For Receipt** [Cancel](#)

Contribution Details

| | |
|--------------------------|------------------------|
| From | Alex Fergie |
| Fund | General Fund |
| Total Amount | \$100.00 |
| Net Amount | \$100.00 |
| Fee Amount | \$ 0.00 |
| Advantage Amount | \$0.00 |
| Description of advantage | - |
| Received | Mar 6th, 2023 11:53 AM |
| Received Into | Deposit Bank Account |
| Status | Completed |
| Method | Cheque |
| Source | DMS Manual |



The Contribution will then not be eligible for receipts

Note: The Contribution can be modified if a Contribution was marked as receipted or excluded in error. To mark the same Contribution as eligible for receipting again, simply **Edit** it and **uncheck Exclude from Tax Receipting or Contribution Received**.

[Click here to learn more about modifying Contributions.](#)

[Click here to learn more about Tax Receipting.](#)