

Adding a Single Recurring Contribution

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

Donor Management System

When [adding or modifying an offline Contribution](#) in the DMS, you can mark these as recurring Contributions. As a reminder, **offline Contributions** refer to donations **not coming from CanadaHelps** (e.g., cash, cheques, EFTs, or in kind gifts).

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Considerations

Simply marking an **offline Contribution as *Recurring*** will **not automate multiple recurring Contributions** in your DMS. Each recurring Contribution will need to be added manually in your DMS as a unique Contribution.

In other words, if John Doe sends your charity cheques once a month for one year, you'll need to manually record 12 separate offline Contributions (one for each monthly cheque).

Adding an Offline Recurring Contribution

1. Visit 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

Advanced Search

Actions 0 Selected Records Only All 1430 Records

All Contributions Advanced Actions **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	✓

Add Contribution

3. Fill out all the relevant fields on the add [New Contribution](#) page.

4. Expand the **Contribution Details** section, and check the **Mark Contribution as Recurring** box. Then, **Save** your new recurring offline Contribution.

DMS Payments

New Contribution Save Save and New Cancel

CONTRIBUTOR *

Angela Lee

PAYMENT METHOD *

Cheque

TRANSACTION ID

Enter transaction ID

Cheque

Cheque Number 32146857

TOTAL AMOUNT *

CAD (\$) 100

DATE RECEIVED *

01/12/2023  02:54PM

The date this contribution was received.

FUND *

General Fund

CAMPAIGN

- select -

SOURCE

+ Add New Source

DMS Manual

CONTRIBUTION STATUS

Completed

^ Contribution Details

EXCLUDE FROM TAX RECEIPTING



CONTRIBUTION RECEIPTED

RECEIPT NUMBER

CONTRIBUTION NOTE

MARK CONTRIBUTION AS RECURRING

^ Dedication Information

^ Additional Details

Save Save and New Cancel

Reminder: each recurring Contribution received will have to be manually added to the DMS separately.

5. Any recurring offline Contributions will be noted as **Recurring** or **Recurring Payment** in the *Contributions Tab* and *Contribution Details*.

The screenshot shows the 'Contributions' tab in the Wellness Avenue DMS. The interface includes a search bar, navigation tabs (Dashboard, Contacts, Contributions, Campaigns, Opportunities, Reports, DMS Mail), and a settings dropdown (DMSCA DMSCA). Below the search bar, there are filters for 'Actions' (0 Selected Records Only, All 1435 Records), 'All Contributions', 'Advanced Actions', and an 'Add Contribution' button. The main table lists contributions with columns: Received, Name, Amount, Fund, Campaign, Source, Method, Status, Receipt No., and Thanked. A red box highlights a contribution from Noboru K for \$50.00 (Recurring) under the 'Monthly Giving Webinar' campaign, with a status of 'Completed' and a green checkmark in the 'Thanked' column. A blue question mark icon is visible in the bottom right corner of the table area.

Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
<input type="checkbox"/> March 1st, 2023 02:31 PM	Tamara Rahmani	\$100.00	General Fund		DMS Manual	Cheque	Completed	-	-
<input type="checkbox"/> March 1st, 2023 02:19 PM	Nicole Lam	\$500.00	General Fund		DMS Manual	Cheque	Completed	-	-
<input type="checkbox"/> March 1st, 2023 01:17 PM	Nicole Lam	\$300.00	General Fund		DMS Manual	Cheque	Completed	-	-
<input type="checkbox"/> March 1st, 2023 12:32 PM	Tamara Rahmani	\$150.00	General Fund		DMS Manual	Cheque	Completed	-	-
<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	Noboru K	\$1.00	2023	Monthly Giving	DMS Payments Credit Card	Credit Card	Completed	-	-

Contributions tab > Recurring Contributions