

Modifying a Single CanadaHelps Contribution

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Donor Management System

While using your DMS, certain scenarios may require modifications to some Contributions coming from CanadaHelps.org to help in your administrative tasks. As a reminder, CanadaHelps Contributions are donations made through any of the CanadaHelps fundraising options available in CanadaHelps.org, including:

- Your charity Profile page (and any Profile page campaigns)
- Custom Donation forms
- Ticketed Events
- Peer-to-peer campaigns
- Donations of securities
- Donations of cryptocurrency

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Considerations

- Modifying CanadaHelps Contributions in your DMS **will not change these donations back on CanadaHelps.org.**
- **CanadaHelps.org will always maintain the original information** provided by the donor.
- **You won't be able to modify any Tax Receipting information** for these Contributions.

What can I modify from CanadaHelps Contributions in the DMS?

- A donor accidentally contributed to a different **Fund** or **Campaign** than they intended.
- A donor wishes to add, modify, or delete their **dedication information** (e.g. "In Memory of").
- You wish to add a **Note** with more information about this Contribution.
- A donor accidentally marked their contribution as **Recurring**.
- A donor now wants their contribution to be **Recurring**.

You can also modify a single [Offline Contribution](#) or add multiple offline Contributions at once.

Modifying a Single CanadaHelps Contribution

1. Visit the **Contributions Tab**

2. Search for the **CanadaHelps Contribution** you wish to modify and select the Contribution **Amount** to see its details.

The screenshot shows the 'Contributions' tab in the Wellness Avenue system. At the top, there is a navigation bar with 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. A search bar is located below the navigation bar. Below the search bar, there are filters for 'Actions' (0 Selected Records Only, All 1430 Records), 'All Contributions', 'Advanced Actions', and 'Add Contribution'. A table of contributions is displayed with columns: Received, Name, Amount, Fund, Campaign, Source, Method, Status, Receipt No., and Thanked. Two contributions are listed, both from 'Noboru K' on 'January 31st, 2023'. The first contribution is for '\$52.00 (Recurring)' with 'Source' 'CanadaHelps' highlighted in red. The second contribution is for '\$10.00 (Recurring)' with 'Source' 'CanadaHelps'. A 'Contribution Search' banner is at the bottom.

3. You can also conduct an **Advanced Search for Contributions** to filter by donations whose source is "CanadaHelps":

The screenshot shows the 'Advanced Search for Contributions' page in the Wellness Avenue system. The page has a navigation bar with 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. Below the navigation bar, there is a search bar and a 'Search' button. The search criteria are organized into several sections: 'CONTRIBUTOR NAME OR EMAIL', 'CONTACT TAG(S)', 'CONTACT TYPE' (Any), 'DATE RECEIVED' (Any), 'CONTRIBUTION AMOUNTS' (From, To), 'TRANSACTION ID' (Transaction ID), 'CAMPAIGN GROUPS', 'THANK YOU SENT' (Any), 'EXCLUDE' (checked), 'INCLUDE BY PRIVACY OPTION(S)', 'CONTRIBUTOR GROUP(S)', 'SEARCH IN TRASH (DELETED CONTACTS)', 'CONTRIBUTION STATUS', 'PAYMENT METHOD' (Any), 'INVOICE NUMBER' (Invoice Number), 'CAMPAIGN' (Any), 'CONTRIBUTION RECEIPTED' (Any), 'CURRENCY' (Any), 'FUND' (All Contributions), 'GL ACCOUNT' (Any), 'SOURCE' (CanadaHelps, highlighted in red), and 'PREFERRED COMMUNICATION METHOD' (Any). A 'Contribution Search' banner is at the bottom.

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

The screenshot shows the 'Contributions from Noboru K' page. At the top, there is a navigation bar with 'Wellness Avenue' logo and menu items: Dashboard, Contacts, Contributions (selected), Campaigns, Opportunities, Reports, and DMS Mail. On the right, there are links for 'Settings | Help' and a dropdown menu for 'DMSCA DMSCA'. Below the navigation, the page title is 'Contributions from Noboru K'. In the top right corner, there is a blue 'Edit' button with a pencil icon, which is highlighted with a red box, and a white 'Cancel' button. The main content area is a table titled 'Contribution Details' with the following data:

From	Noboru K
Fund	Fitness
CH Fund Name	Fitness Initiative
Total Amount	\$52.00 Recurring Payment
Net Amount	\$50.18
Fee Amount	\$1.82
Fees covered	-
Disbursed on	
Advantage Amount	\$0.00
Description of advantage	-
Received	Jan 31st, 2023 11:56 PM
Received Into	Deposit Bank Account

At the bottom of the page, there is a dark grey bar with the text 'Edit Contribution'.

4. You'll be able to modify some fields related to that Contribution, including:

- The associated **Fund** and **Campaign**
- **Dedication** information
- **Contribution Note**
- Whether the contribution is intended to be **Recurring**.
 - Changing this field alone will not prevent future donations in CanadaHelps.org. [Your donor will have to contact us](#) to make any modifications to their original donation.

Note: You will not be able to edit **Contributor, Total Amount, Date Received, Source, External Receipt Number, or Advantage Amount** fields.

The screenshot shows the bottom of the 'Edit Contribution' page. At the top, there are three buttons: 'Save', 'Save and New', and 'Cancel'. Below these buttons is an information message box with a blue icon and the text: 'Please note CanadaHelps-sourced contributions have limited editing available.' Below the message box, the word 'CONTRIBUTOR' is partially visible.

CONTRIBUTOR

Noboru K

TOTAL AMOUNT *

CAD (\$) 52.00

DATE RECEIVED *

01/31/2023 11:56PM

The date this contribution was received.

FUND *

Fitness

CAMPAIGN

Make It Monthly 2023

SOURCE

CanadaHelps

Payment Method	Transaction ID	Status
CH - Credit Card	CH+0008573976	Completed

^ Additional info

CH FUND
Fitness Initiative



^ Contribution Details

EXCLUDE FROM TAX RECEIPTING ?

CONTRIBUTION RECEIPTED

RECEIPT NUMBER

CONTRIBUTION NOTE

RECURRING

^ Dedication Information

Do you want to dedicate it to somebody ?

IN MEMORY OF *

Yes No

IN HONOUR OF *

Yes No

NAME OF HONOREE

MESSAGE

∨ Custom Question

∨ Additional Details

Save

Save and New

Cancel

Modifiable Fields

4. Edit all necessary fields and select **Save** to confirm your modifications.