

Refunding a Single Contribution

Last Modified on 03/01/2023 5:55 pm EST

Donor Management System

At some point, and under [specific circumstances](#), your charity might be faced with the need to refund a Contact for their offline Contribution (i.e., a gift not made through CanadaHelps.org). You can keep track of any refunds in your DMS by simply **modifying the original Contribution**. It'll then be up to you to decide the best way to credit your donor for the refunded amount.

This article will cover how to mark a Contribution as *Refunded* in the DMS by modifying its *Contribution Status*.

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Considerations

- You can only change the *Contribution Status* for an **offline Contribution** (i.e., those Contributions whose *Source* is not CanadaHelps)
- If the offline Contribution you want to refund **has already been tax receipted**:
 - Changing a *Contribution Status* to *Refunded* will **automatically cancel the tax receipt** associated with it
 - **Important:** To be able to access the voided tax receipt (so you can send a copy to your donor), you'll want to make sure that you **void the tax receipt *before* changing the Contribution Status** (see [below](#))
 - Otherwise, even if you revert the Contribution Status from *Refunded* back to *Completed*, the original tax receipt will remain cancelled (but you won't be able to access a copy of it)
- If the Contribution you're looking to refund **has not been tax receipted**, feel free to head straight to the [Refunding a Contribution section](#) of this article

Voiding the Tax Receipt (if applicable)

As mentioned above, if you're looking to refund a Contribution for which you've already **issued a tax receipt**, you'll just want to make sure that you **first void this tax receipt** before changing the Contribution Status. That way, you'll be able to access a copy of the voided tax receipt (to send to your donor).

1. Visit the **Contributions** tab

2. Search for the **Contribution** you want to void the tax receipt for and select the **Contribution Amount**

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

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	✓

Contribution amount

3. On the next page, select **Manage Receipt** in the top-right

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

Contributions from Alex Fergie | Edit | **Manage 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 1st, 2023 9:19 AM
Received Into	Deposit Bank Account

Manage Receipt

4. On the next screen, you'll see **more details about the received Contribution.**

5. Select **Void Tax Receipt** on the bottom-right (note: your **Contact** won't be notified even if **Email** had previously been the Delivery Method).

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Tax Receipt

Receipt Details

Receipt No.	WELL00000913	Issue Date	Mar 1st, 2023 9:21 AM
Issued By	celinaproduct@gmail.com (91)	Method	Email
Type	Single	Receipt Status	Issued
Amount	\$100.00	Email Opened	

Thank You Settings

Mark Contribution as thanked

Send a custom Thank You Message

Delivery Method

Method: Email

Back Complete

Void Receipt

Void Receipt

6. You can then **download** the voided tax receipt (to send a copy to your donor) by selecting **Print** as the **Delivery Method** and then **Complete**.

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Tax Receipt

Receipt Details

Receipt No.	WELL00000913	Issue Date	Mar 1st, 2023 9:21 AM
Issued By	celinaproduct@gmail.com (91)	Method	Email
Type	Single	Receipt Status	Cancelled
Amount	\$100.00	Email Opened	

Thank You Settings

Mark Contribution as thanked

Send a custom Thank You Message

Delivery Method

Method: Print

Back Preview Complete

Download the cancelled tax receipt to send to your donor

Marking a Contribution as 'Refunded'

1. From the same Tax Receipt landing page where you've just voided the receipt, select the **Contribution amount**

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Tax Receipt

Receipt Details

Receipt No.	WELL00000913	Issue Date	Mar 1st, 2023 9:21 AM
Issued By	celinaproduct@gmail.com (91)	Method	Email
Type	Single	Receipt Status	Cancelled
Amount	\$100.00	Email Opened	

Thank You Settings

Mark Contribution as thanked

Send a custom Thank You Message

Delivery Method

Method: Email

Select Contribution Amount

3. On the Contribution Details page of the Contribution whose receipt was just cancelled, select **Edit** on the top right-hand corner of the screen

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Contributions from Alex Fergie

[Edit](#) [Manage 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 1st, 2023 9:19 AM
Received Into	Deposit Bank Account

Edit Contribution

4. Under **Contribution Status**, change the status from *Completed* to **Refunded**, and click **Save**.

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Save Save and New Cancel

CONTRIBUTOR
Alex Fergie

TOTAL AMOUNT *
CAD (\$) 100.00

DATE RECEIVED *
03/01/2023 10:19AM
The date this contribution was received.

FUND *
General Fund

CAMPAIGN
- select -

SOURCE + Add New Source
DMS Manual

CONTRIBUTION STATUS
Refunded

Cancellation or Refund Information

CANCELLED / REFUNDED DATE
03/01/2023

Enter the cancellation or refunded date, or you can skip this field and the cancellation date or refunded date will be automatically set to TODAY.

CANCELLATION / REFUND REASON
Donor unintentional duplicate

Payment Method	Transaction ID	Status
Cheque		Completed
<ul style="list-style-type: none"> Additional Info Contribution Details Dedication Information Additional Details 		

Save Save and New Cancel

Contribution Status update: Refunded

5. Once the *Contribution Status* has been changed to 'Refunded', back on the Contribution details page, you'll notice that the Contribution is **no longer eligible for a tax receipt**

The screenshot shows the 'Contributions from Alex Fergie' page in the Wellness Avenue system. The page includes a navigation bar with 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. A 'Settings | Help' link and a 'DMSCA DMSCA' dropdown are also present. The main content area displays contribution details for a \$100.00 contribution from Alex Fergie, which was received on Mar 1st, 2023, and is now marked as 'Refunded'. The 'Status' field is highlighted with a red box. A 'Delete Contribution' button is located at the bottom left, and the contact ID '399' is shown at the bottom right. A dark grey banner at the bottom of the page reads 'Contribution status: Refunded'.

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 1st, 2023 10:19 AM
Received Into	Deposit Bank Account
Status	Refunded
Cancelled / Refunded Date	Mar 1st, 2023 12:00 AM
Cancellation / Refund Reason	Donor unintentional duplicate
Method	Cheque
Source	DMS Manual
Receipt Number	WELL00000913
Thank-you Sent	Mar 1st, 2023 1:22 PM

Buttons: Edit, Not Eligible For Receipt, Cancel

Buttons: Delete Contribution

Contact ID: 399

Contribution status: Refunded

What's Next?

Remember, because this was originally an **offline Contribution** (i.e., not made through CanadaHelps), it'll be up to you to decide how to credit your Contact for the Contribution amount (e.g., through cash, etransfer, cheque).