

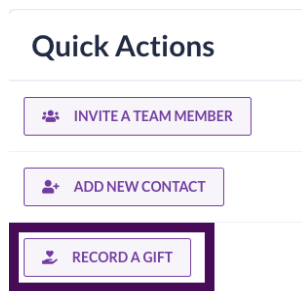
CRM: Add a New Gift

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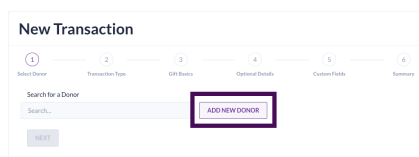
Watch this video to learn how to add/document a new gift in your GiveSmart Donor CRM account.

Steps to add a gift record

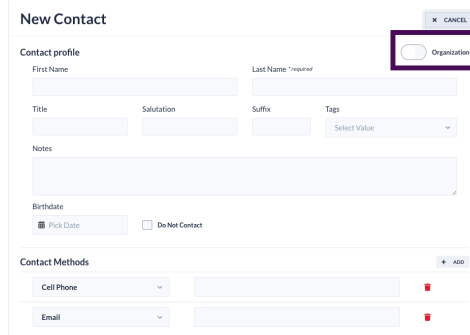
1. From the Quick Actions container within the dashboard, click **RECORD A GIFT**



2. Select a donor
 - o Add to existing donor
 - Search for donor
 - Select transaction type
 - Enter gift details
 - Add optional details
 - Enter custom field info (if available)
 - Review details and click **Submit**
 - o Add to new donor
 - Select **ADD NEW DONOR**



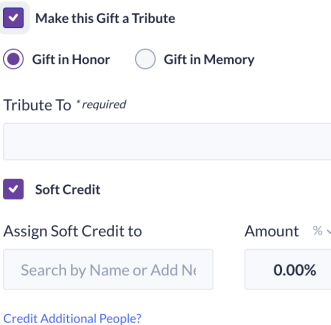
- Enter donor details
 - If a new contact is an Organization, toggle to 'Organization' in the upper right corner



3. Select transaction type

4. Enter gift details

- Choose if the gift will be a Tribute or needs a Soft Credit (Optional)

- The screenshot shows a form with two main sections. The first section is for 'Tribute' and includes a checked checkbox 'Make this Gift a Tribute', radio buttons for 'Gift in Honor' (selected) and 'Gift in Memory', and a text input field labeled 'Tribute To *required'. The second section is for 'Soft Credit' and includes a checked checkbox 'Soft Credit', a dropdown menu 'Assign Soft Credit to' with a search input 'Search by Name or Add N...', and a dropdown menu 'Amount %' with '0.00%' selected. A link 'Credit Additional People?' is also visible.

- **Make this gift a Tribute**

- select the box next to Make this Gift a Tribute
- choose between Gift in Honor or Gift in Memory
- enter the name of the tribute

- **Add a Soft Credit to this Gift**

- select the box next to Soft Credit
- enter the name of an existing contact, and select from the dropdown or select Credit Additional People to add a new contact
- click the dropdown arrow next to Amount to choose between a dollar amount or percent
- enter the amount of soft credit this contact will receive

- **NOTE:** A soft credit report can be viewed by selecting **Gifts** from the left navigation and choosing **Soft Credits**.

5. Add optional details

6. Enter custom field info (if available)

7. Review details and click **Submit**