

# CRM: Add a New Gift

Last Modified on 06/10/2024 11:04 pm PDT

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**
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2. Select a donor
  - Add to existing donor
    - Search for donor and select
  - Add to new donor
    - Select **ADD NEW DONOR**
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      - Enter donor details
        - If a new contact is an Organization, toggle to 'Organization' in the upper right corner
3. Select solicitation method
4. Enter gift details
  - Choose if the gift will be a Tribute or needs a Soft Credit (Optional)
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    - 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. Select thank you method
  - Email only
  - Letter & email

- Letter only
  - No thank you letter
6. Add optional details
  7. Enter custom field info (if available)
  8. Select Summary to review the details then click **Submit**
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