

CRM: Dashboard Overview

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Watch this video to learn about the dashboard on your GiveSmart Donor CRM account.

Dashboard Containers

Total Raised Year to Date

- Quick total of funds raised year to date

Quick Actions

- Link to Invite a Team Member
- Link to Add New Contact
- Link to Record a Gift

Key Statistics

- Recommended statistics to track per the AFPFEP

Donor Annual Review Retention Rate

- Link to article with video

Donor Retention Rate

- Link to article with video

Most Recent Donors

- List of the most recent donors with activity

My Activities

- Link to article with video
 - View outstanding activities
 - View completed activities
 - Add activities to your calendar
 - Number assigned

Yearly Comparison

- Link to article with video
 - Year over year comparison of funds raised

Donor Map

- Link to article with video
 - View the mailing address locations of your donors
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