

Bulk Edit Gifts

Last Modified on 06/27/2024 1:07 pm EDT

Gifts can be bulk edited to delete gifts, add/change available fields or remove fields.

Locate the bulk action feature by selecting **Gifts** from the left navigation, and choose **Gift Listing** from the dropdown.

To apply an advanced filter or data range, select Advanced Filter.

The screenshot displays the GiveSmart Donor CRM interface. The left sidebar contains navigation options: Dashboard, Data Import & Review, Households & Groups, Donors & Contacts, Gifts, Pledges, Collect Donations, Communications, Activities, Reports, and Filters. The main content area is titled 'Gifts' and includes a search bar, a 'Bulk Actions' dropdown menu, and a table of gift transactions. The table has columns for External Transaction ID, Transaction ID, Date, Type, Campaign, and External System. A summary row at the bottom shows a count of 888 gifts, a total sum of \$548,003.92, an average of \$617.12, and a median of \$265.00. A pagination bar at the bottom shows page 1 of 18.

External Transaction ID	Transaction ID	Date	Type	Campaign	External System
...	845810	Jun 01, 2024	Check	2023 Fundraising	
...	808092	Dec 18, 2023	Credit Card	2023 Fundraising	
...	808091	Dec 18, 2023	Credit Card	2023 Fundraising	
...	808090	Dec 18, 2023	Credit Card	2023 Fundraising	
Website_123457	845722	Nov 30, 2023	Other	2023 Fundraising	
5678	845720	Nov 30, 2023	Cash	2023 Fundraising	
...	807945	Dec 28, 2021	Other	2023 Fundraising	
...	807698	Dec 28, 2021	Other	2023 Fundraising	

Summary Totals: Count: 888, Gift Sum: \$548,003.92, Average: \$617.12, Median: \$265.00

Select which gifts you wish to edit by clicking the checkbox next to the gift. Once the gifts are selected, click **Bulk Actions**. From the dropdown choose Delete, Add/Change Field or Remove Field.

Delete

To delete a gift, click the checkbox next to the gifts you wish to delete. Select Bulk Actions, choose Delete from the dropdown and click Apply. A popup will appear asking you to confirm the deletion of the gifts. Once selected, a green confirmation will appear in the top right.

Delete Transaction

X CANCEL

You are about to delete **2 transactions**. Are you sure about this?

CANCEL

DELETE PERMANENTLY

Add/Change Field

To add or modify a field, click the checkbox next to the gifts you wish to edit. Select Bulk Actions, choose Add/Change Field and click Apply. Select the field you wish to edit, and select the entry for the field. Field entries can be selected from all available options or a new one can be added by selecting Add New +.

Once complete, click Update. A green confirmation will appear in the top right.

Add/Change Fields

✕ CANCEL

CANCEL UPDATE

Remove Field

To remove a field, click the checkbox next to the gifts you wish to edit. Select Bulk Actions, choose Remove Field and click Apply. Select the field you wish to remove, and select the field entry that needs to be removed. Some field types may only have 1 option to select from however fields with multiple options allow for multi-select removal.

Once complete, click Remove. A green confirmation will appear in the top right.

Advanced Search ▾

Remove Fields

✕ CANCEL

Capital Campaign ✕ Special Events ✕

CANCEL REMOVE

807825 Dec 22, 2020