

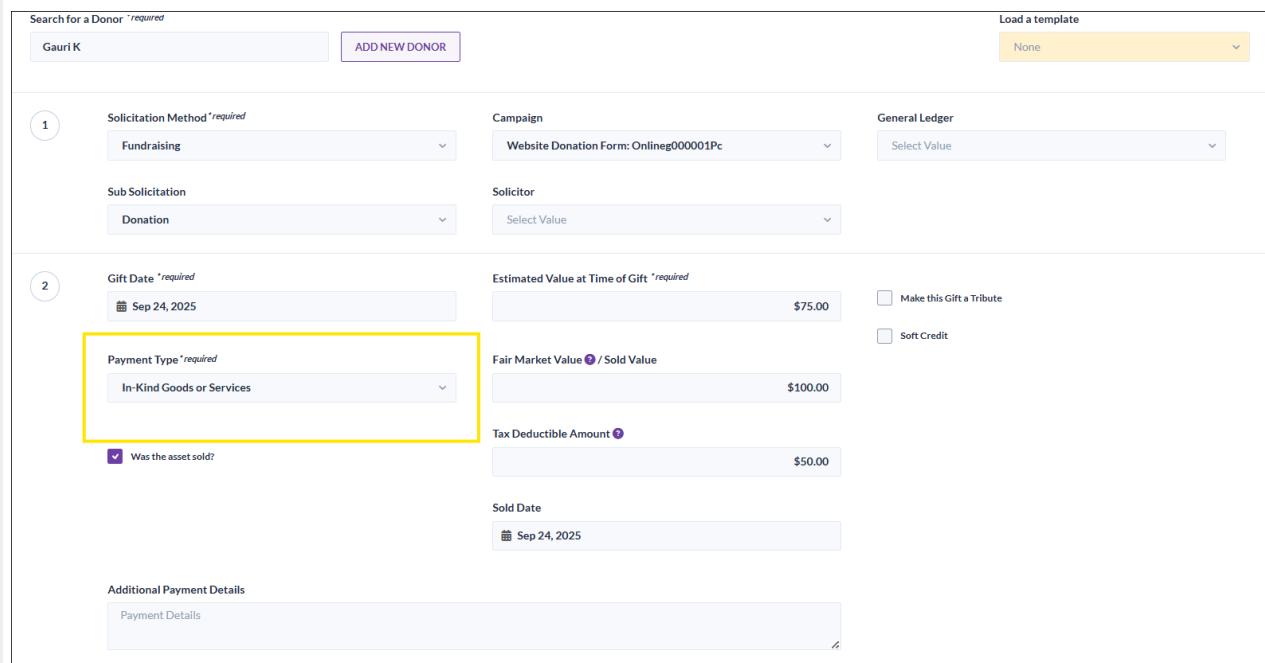
How To add an In Kind Gift

Last Modified on 12/12/2025 1:49 pm EST

An In Kind Gift is a non-monetary gift (e.g. a physical asset vs. cash) which can be recorded in Donor CRM.

Adding an In Kind Gift

When recording a new gift in Donor CRM, select the Payment Type for **In-Kind Goods or Services**. Fill in the **Gift Date** and **Estimated Value at Time of Gift**.



Search for a Donor *required

Gauri K

ADD NEW DONOR

Load a template

None

1

Solicitation Method *required

Fundraising

Campaign

Website Donation Form: Onlineg000001Pc

General Ledger

Select Value

Sub Solicitation

Donation

Solicitor

Select Value

2

Gift Date *required

Sep 24, 2025

Estimated Value at Time of Gift *required

\$75.00

Make this Gift a Tribute

Soft Credit

Payment Type *required

In-Kind Goods or Services

Fair Market Value / Sold Value

\$100.00

Tax Deductible Amount

\$50.00

Was the asset sold?

Sold Date

Sep 24, 2025

Additional Payment Details

Payment Details

Optional: Check the "Was the asset sold" box to complete the **Sold Date** field.

Search for a Donor required
Gauri K

Load a template
None

1 **Solicitation Method required** Fundraising **Campaign** Website Donation Form: Onlineg000001Pc **General Ledger** Select Value

Sub Solicitation Donation **Solicitor** Select Value

2 **Gift Date required** Sep 24, 2025 **Estimated Value at Time of Gift required** \$75.00 Make this Gift a Tribute
 Soft Credit

Payment Type required In-Kind Goods or Services **Fair Market Value ? / Sold Value** \$100.00

Was the asset sold? **Tax Deductible Amount ?** \$50.00

Sold Date Sep 24, 2025

Additional Payment Details
Payment Details

In Kind Gift Reporting

To easily view In Kind Gifts moving forward, use the left navigation and select Filters >[Add Filters](#).

Select **Transactions**, and build your first condition to return transactions where the **Value of Gift Type Is Equal To In Kind** > Save.

GiveSmart®
Donor CRM

Search...

Dashboard

Data Import & Review

Households & Groups

Donors & Contacts

Gifts

Pledges

Collect Donations

Communications

Activities

Reports

Filters

In Kind Donations

Folder: Default Fundraising Filters

Show me: TRANSACTIONS

Filter Explanation: Show me all Transactions where the value of Gift Type is equal to In Kind.

Matched 3 out of 38 TRANSACTIONS

1st CONDITION

where the Value of Gift Type Is Equal To In Kind

+ ADD ANOTHER CONDITION

SAVE SAVE & PREVIEW CANCEL

To apply your filter:

1. Use the left navigation and select Gifts > Gift Listing.

2. Toggle Advanced Search to reveal the Advanced Filters.
3. Search for or select your **In Kind** filter.
4. Select Apply to return all In Kind Gifts at any time.

The screenshot shows the 'Gifts' search interface. At the top right are 'ADD NEW+' and 'DOWNLOAD EXCEL (UTC)' buttons. Below them is a search bar with a 'Search...' placeholder and an 'Advanced Search' dropdown. Under 'Show Gifts from', there are date pickers for 'Pick Date' and 'to' 'Pick Date', and a 'Include Refunds/Voids' checkbox. On the right, there's an 'Advanced Filters' section with a dropdown set to 'In Kind Donations', an 'Invert filter' checkbox, a 'CLEAR ALL' button, and a prominent yellow-outlined 'APPLY' button.

Note the Applied Filter, and select the **Download Excel** option to export the details.

The screenshot shows the 'Gifts' search interface with the 'Applied Filter' section highlighted. It shows 'In Kind Donations' selected, with a yellow box around it. At the top right are 'ADD NEW+' and 'DOWNLOAD EXCEL (UTC)' buttons. The 'DOWNLOAD EXCEL (UTC)' button is also highlighted in yellow.

In Kind Date and Amount

When an In Kind gift is entered without a Sold Value or Sold Date, there will be no Date or Amount noted in your Gift Listing.

The screenshot shows the 'Gifts' search interface with a table of results. The columns are: External Transaction ID, Date, Type, External System, Donor, Amount, FMV, TDA, and Solicitation Method. The 'Date' and 'Amount' columns are highlighted with yellow boxes. At the top right are 'ADD NEW+' and 'DOWNLOAD EXCEL (UTC)' buttons. The table includes summary totals at the bottom: Count: 1, Gift Sum: \$0.00, Average: \$0.00, Median: \$0.00. A 'Total selected: 0' message is also present.

To rectify, select the Gift Actions on the left > Edit.

The screenshot shows the 'Gifts' search interface with a 'Bulk Actions' dropdown menu. The 'Edit' button is highlighted with a yellow box. Other options in the dropdown are 'Delete' and 'Apply to a Pledge'. The main table shows a single result: Transaction ID: In Kind, Donor: GiveSmart Support, Amount: \$0.00, FMV: \$0.00, TDA: \$0.00. Summary totals at the bottom are: Gift Sum: \$0.00, Average: \$0.00, Median: \$0.00. At the top right are 'ADD NEW+' and 'DOWNLOAD EXCEL (UTC)' buttons.

Check the "Was the asset sold?" box and fill in the Fair Market Value/Sold Value field (Gift Amount) and Sold Date (Gift Date) and submit.

1

Solicitation Method*^{required}
Fundraising

Campaign
General

General Ledger
Select Value

Sub Solicitation
Donation

Solicitor
Select Value

2

Gift Date*^{required}
Dec 12, 2025

Estimated Value at Time of Gift*^{required}
\$500.00

Make this Gift a Tribute

Soft Credit

Payment Type*^{required}
In-Kind Goods or Services

Fair Market Value ? / Sold Value
\$500.00

Tax Deductible Amount ?
\$500.00

Was the asset sold?

Sold Date
Dec 12, 2025

Additional Payment Details
Payment Details

Note: For In-Kind Donations, the **Sold Date** will be the *Gift Date*, and the **Sold Value** will be the *Gift Amount* in your Gift Listing.