

How do I add an In Kind Gift?

Last Modified on 08/30/2024 2:51 pm EDT

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**.

The screenshot shows the 'New Transaction for GiveSmart Support' form in the GiveSmart Donor CRM. The form is divided into two main sections, 1 and 2. Section 1 includes fields for Solicitation Method (set to 'Unsolicited'), Campaign (set to '2024 Campaign'), Sub Solicitation (set to 'Select Value'), and Solicitor (set to 'Select Value'). Section 2 includes fields for Gift Date (set to 'Aug 30, 2024'), Estimated Value at Time of Gift (set to '\$0.00'), Payment Type (set to 'In-Kind Goods or Services', highlighted with a yellow box), and Fair Market Value (set to '\$0.00'). A search bar at the top left contains 'GiveSmart Support' and an 'ADD NEW DONOR' button is visible.

Check the "Was the asset sold" box to complete the **Sold Value** and **Sold Date** fields.

2

Gift Date ^{*required}
Aug 30, 2024

Estimated Value at Time of Gift ^{*required}
\$100.00

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

Fair Market Value [?]
\$0.00

Was the asset sold?

Sold Value
\$0.00

Sold Date
Aug 30, 2024

Tax Deductible Amount [?]
\$0.00

Make this Gift a Tribute

Soft Credit

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.

Gifts ADD NEW + DOWNLOAD EXCEL (UTC)

Search Advanced Search ^

Show Gifts from to Advanced Filters In Kind Donations Invert filter

Include Refunds / Voids CLEAR ALL APPLY

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

Gifts ADD NEW + DOWNLOAD EXCEL (UTC)

Search Advanced Search ^

Applied Filter: In Kind Donations x CLEAR ALL

Why is my In Kind Gift missing a 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.

Gifts ADD NEW + DOWNLOAD EXCEL (UTC)

Search Advanced Search ^

Bulk Actions Total selected: 0

<input type="checkbox"/>	External Transaction ID	Date	Type	External System	Donor	Amount	FMV	TDA	Solicitation Method
<input type="checkbox"/>			In Kind		GiveSmart Support	\$0.00	\$0.00	\$0.00	Unsolicited
Summary Totals		Count: 1	Gift Sum: \$0.00	Average: \$0.00	Median: \$0.00				

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

Gifts ADD NEW +

Search Advanced Search ^

Bulk Actions Total selected: 0

<input type="checkbox"/>	Transaction ID	Date	Type	External System	Donor	Amount	FMV	TDA
<input type="checkbox"/>			In Kind		GiveSmart Support	\$0.00	\$0.00	\$0.00
Summ:		Gift Sum: \$0.00	Average: \$0.00	Median: \$0.00				

Check the "Was the asset sold?" box and fill in a Sold Value (Gift Amount) and Sold Date (Gift Date) and Submit.

2

Gift Date ^{* required}

📅 Aug 30, 2024

Estimated Value at Time of Gift ^{* required}

\$100.00

Payment Type ^{* required}

In-Kind Goods or Services

Fair Market Value [?]

\$0.00

Was the asset sold?

Tax Deductible Amount [?]

\$0.00

Sold Value

\$100.00

Sold Date

📅 Aug 30, 2024

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.