

New User Interface 2026

Last Modified on 03/17/2026 9:50 am EDT

New Unified Design Interface (UI Refresh)

We have introduced a refreshed, unified design interface across the GiveSmart Donor CRM platform. While all existing functionalities remain unchanged, you will notice a modern, consistent look and feel aligned with the broader MomentiveIQ product ecosystem.

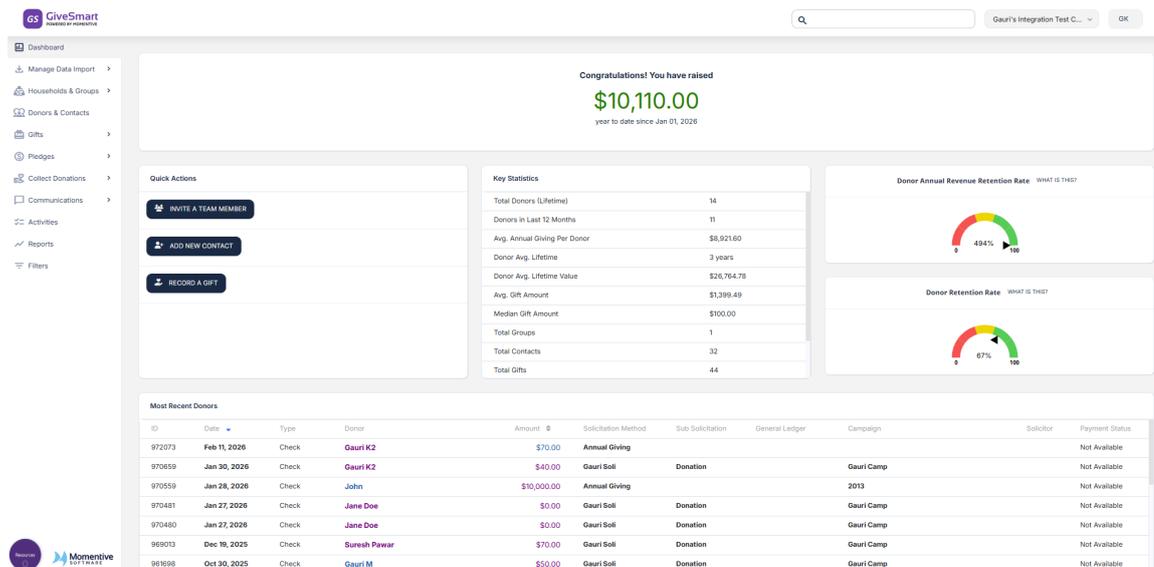
This update focuses purely on visual and usability enhancements -No workflows or features have been modified. The refreshed interface improves clarity, consistency and cross-platform familiarity, making navigation more intuitive and the overall experience more seamless.

What Have We Updated?

As part of this UI refresh, we have applied enhancements across multiple components within Donor CRM:

- **Color Palette**

Implemented a unified color palette across the system to ensure visual consistency, strengthen brand alignment and enhance usability.



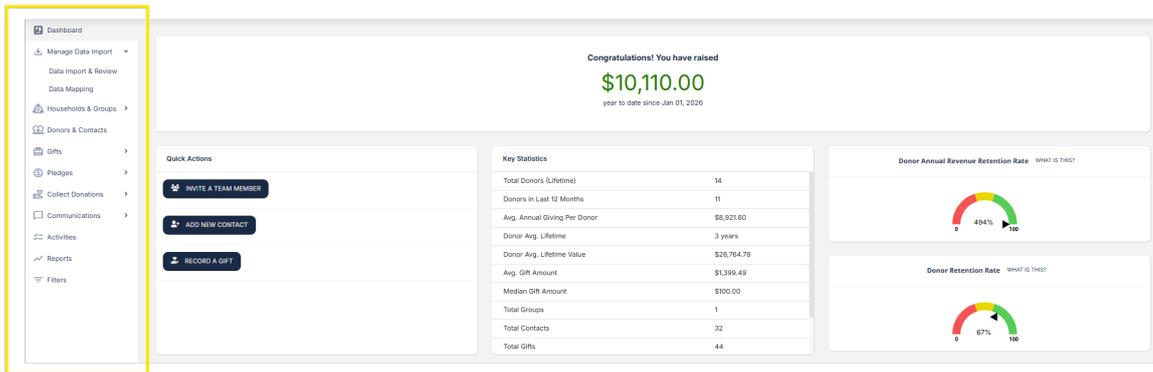
- **Global Header**

Refreshed the global header with updated colors, iconography and layout standards to improve navigation efficiency and create a consistent experience across products.



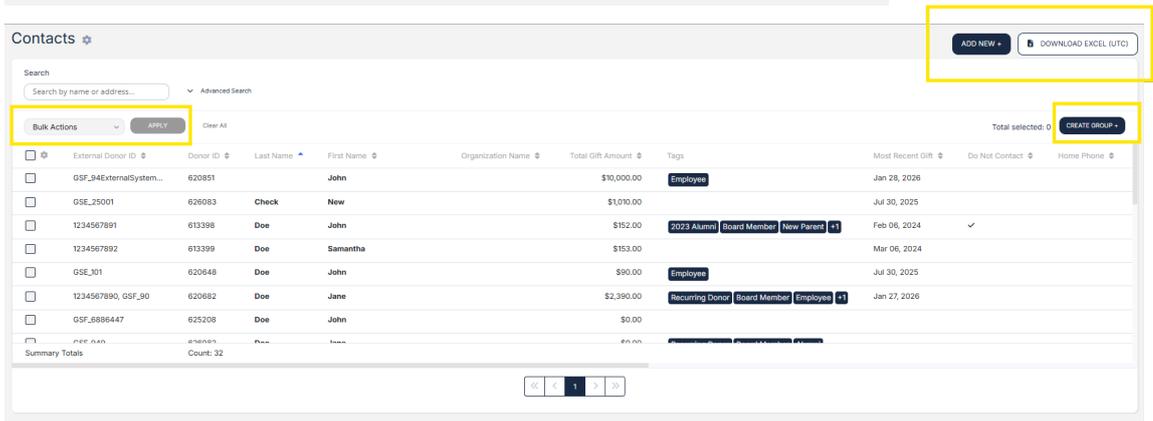
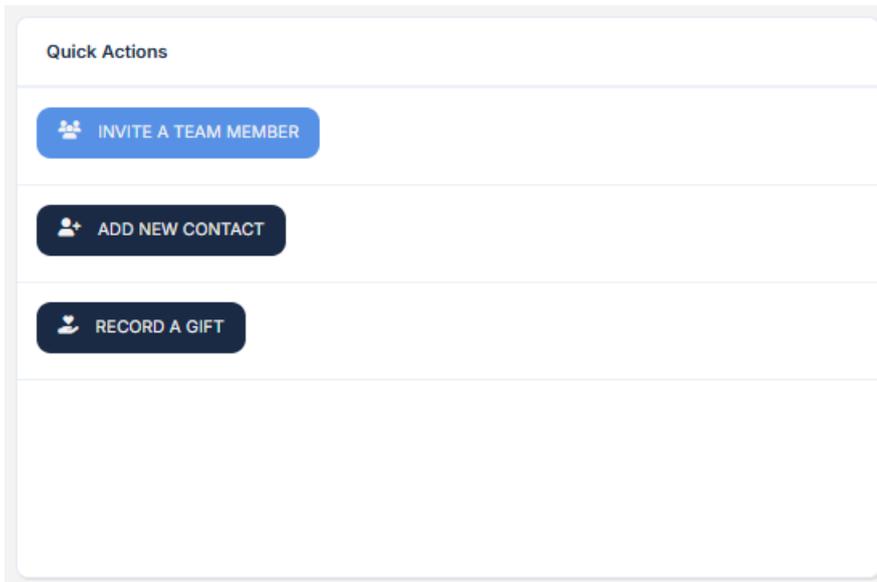
- **Left-Hand Navigation**

Updated styling, typography and icons while retaining the familiar navigation structure to ensure ease of access without disrupting existing workflows.



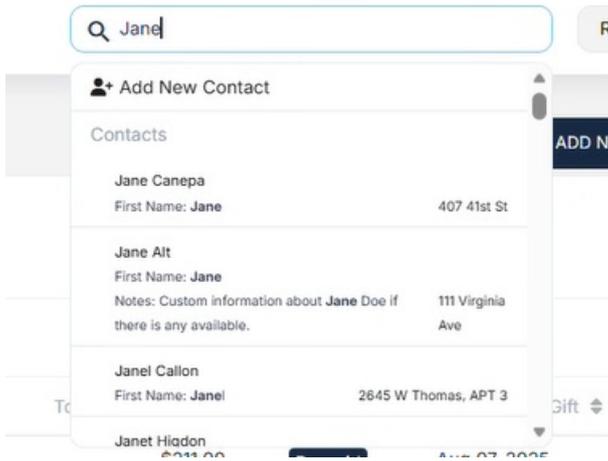
• Buttons

Standardized button styling, sizing and placement across the system to promote clarity, consistency and user confidence.



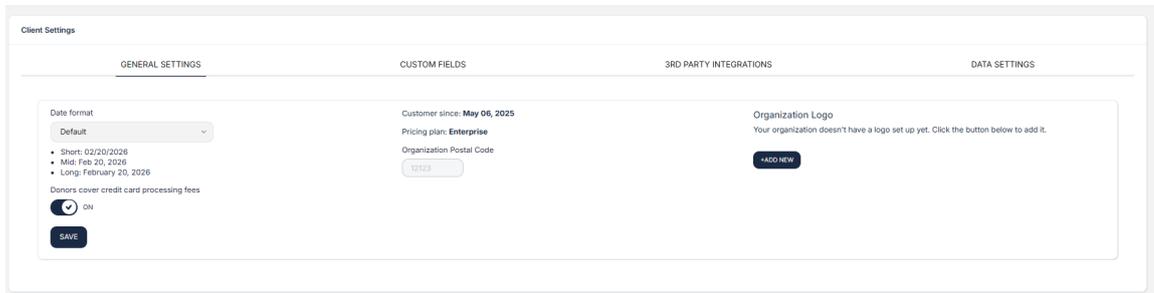
• Search (Super Search)

Updated the UI of the global search feature to align with the new design system, making it easier to locate information in data-rich environments.



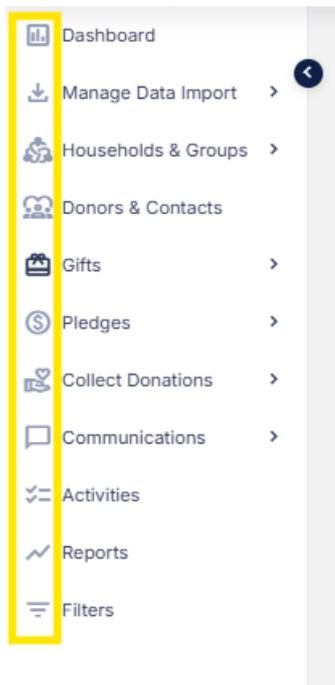
- **Tabs**

Refreshed tab styles to ensure consistency across products and improve content organization and usability.



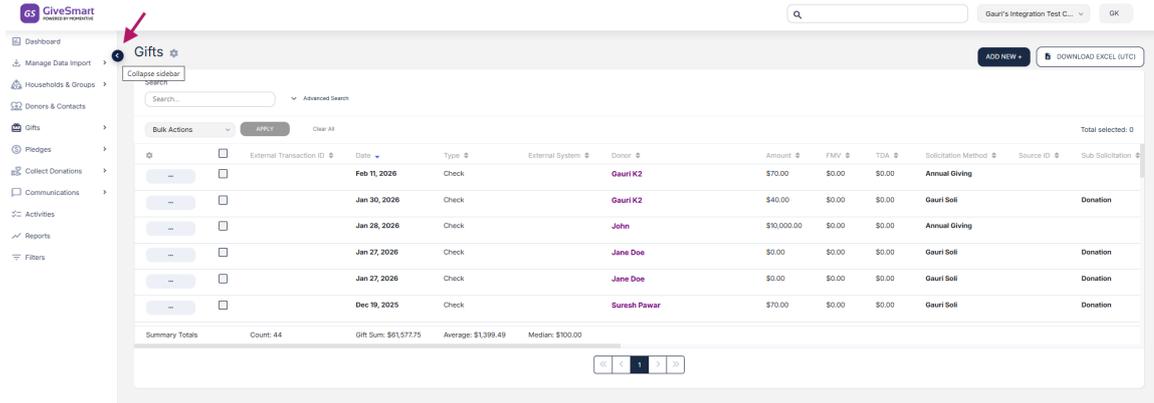
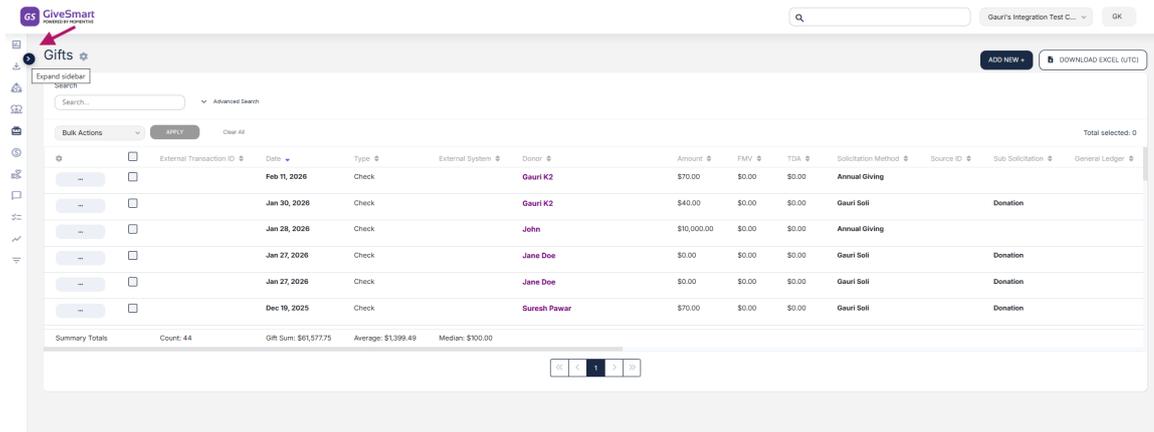
- **Icons**

Updated all system icons to align with the Familiar UI design language, improving clarity and reducing the learning curve.



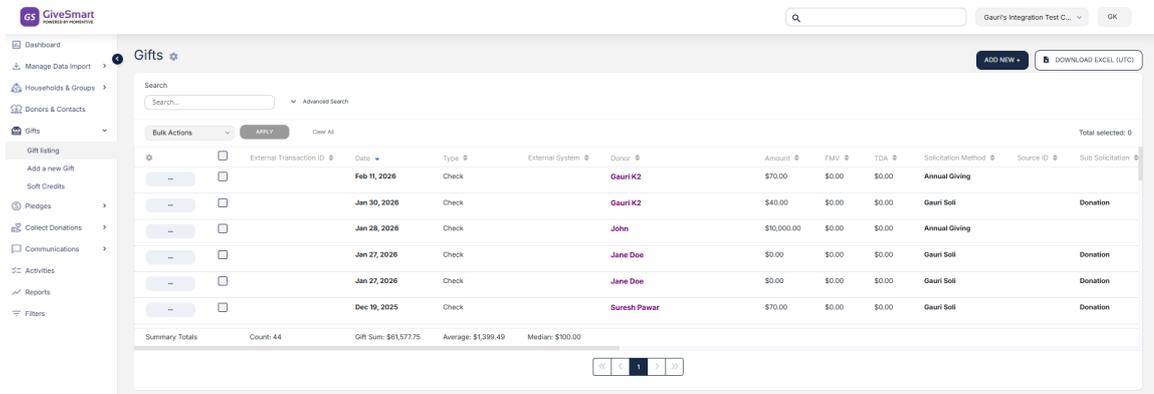
- **Expandable/Collapsible Sections**

Standardized expandable components to provide a more consistent and intuitive experience, particularly in content-dense areas.



- **Fonts**

Adopted the Inter font family as the default system font to enhance readability, ensure cross-platform consistency, and improve performance.



- **Progress Components**

Updated progress indicators with the new color palette and typography to clearly communicate action status and improve user engagement.

Import your data

Need a template?

Select the proper template for your data. Once the data is added, follow instructions below to import your data. If all your data is coming in through Automated Data Sync (ADS) or you already have a filled template, you can skip this step.

What kind of template do you want to download?

Select a Template

DOWNLOAD

Import your data

Always upload contacts before transactions to avoid deficient data.

Which template does your data correspond to?

Contacts Template Default

Once your data is correctly formatted in the template, upload it here:

Donor_CRM_Contacts_Template (2...

UPLOAD FILE



Upload 10% Complete

- **Additional Familiar UI Components**

Refreshed various GiveSmart-specific components, including: Stepper, Cards, Input Fields, Checkboxes, Toggles, Radio Buttons, AutoComplete, Date Picker, Tags, Tooltips, Dialog Boxes, Select fields and Pagination controls.

The screenshot shows the 'Edit Pledge for Jane Doe' form with a stepper at the top. The first step, 'Select Donor', is active and highlighted with a red arrow. The form includes fields for Start Date (Jul 15, 2026), Total Amount (\$700.00), Schedule (Weekly), and Total Payments (4). A calendar is open for July 2026, with the 15th selected. The End Date is Aug 05, 2026. There are dropdowns for Overpay and Underpay methods. A 'Payments Timetable' table is on the right.

Payments Timetable		
1.	\$175.00	Jul 15, 2026
2.	\$175.00	Jul 22, 2026
3.	\$175.00	Jul 29, 2026
4.	\$175.00	Aug 05, 2026

Dashboard

- Manage Data Import
- Data Import & Review
 - Data Mapping
 - Households & Groups
 - Donors & Contacts
 - Gifts
 - Pledges
 - Collect Donations
 - Communications
 - Activities
 - Reports
 - Filters

Import your data

Need a template?
 Select the proper template for your data. Once the data is added, follow instructions below to import your data. If all your data is coming in through Automated Data Sync (ADS) or you already have a filled template, you can skip this step.

What kind of template do you want to download?
 Select a Template [dropdown] **DOWNLOAD**

Import your data
 Always upload contacts before transactions to avoid deficient data.

Which template does your data correspond to?
 Select a Template [dropdown]

Confirm your data

Import Review >

Finalize your import and make sure your data is coming in the way you want it to.

Import Review - Anonymous Transactions >

Finalize your imported anonymous transactions and make sure your data is coming in the way you want it to.

Check for duplicates and changes

Review potential duplicate contacts >

Review potential duplicates found during the system scan. Reconcile now or save for later.

Review potential duplicate transactions >

Review potential duplicates found during the system scan. Reconcile now or save for later.

Check name changes from automated imports >

View and download reports to double-check constituent name changes that occurred through automated imports.

New Contact CANCEL

Who is this contact record being created for?

Individual
 Organization

Contact Profile

First Name

Last Name * required

Title
 Salutation
 Suffix
 Tags

Notes

Birthdate

Do Not Contact

Contact Methods

Edit Transaction for Gauri K2

Search for a Donor * required

Q Gauri K2

ADD NEW DONOR

1

Solicitation Method* required

Annual Giving

Sub Solicitation

Select Value

2

Gift Date * required

📅 Pick Date

Payment Type* required

Check

Check Number

Check Number

Additional Payment D

Payment Details

FEBRUARY 2026

Su Mo Tu We Th Fr Sa

1 2 3 4 5 6 7

8 9 10 11 12 13 14

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22 23 24 25 26 27 28

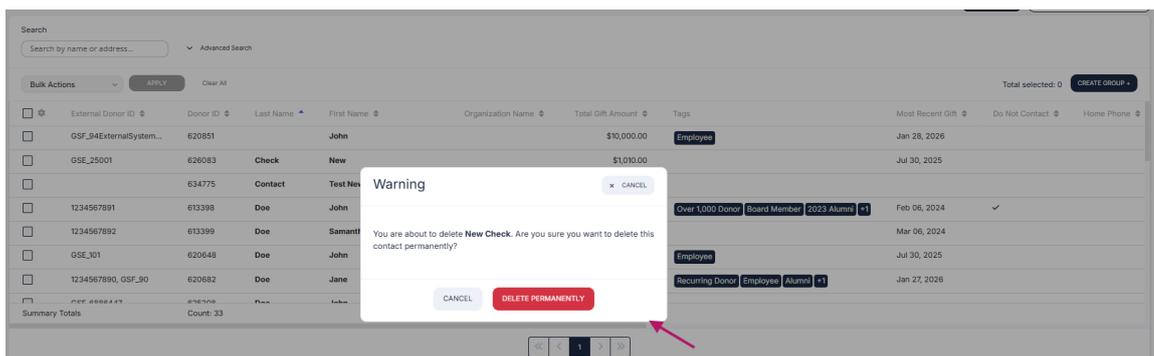
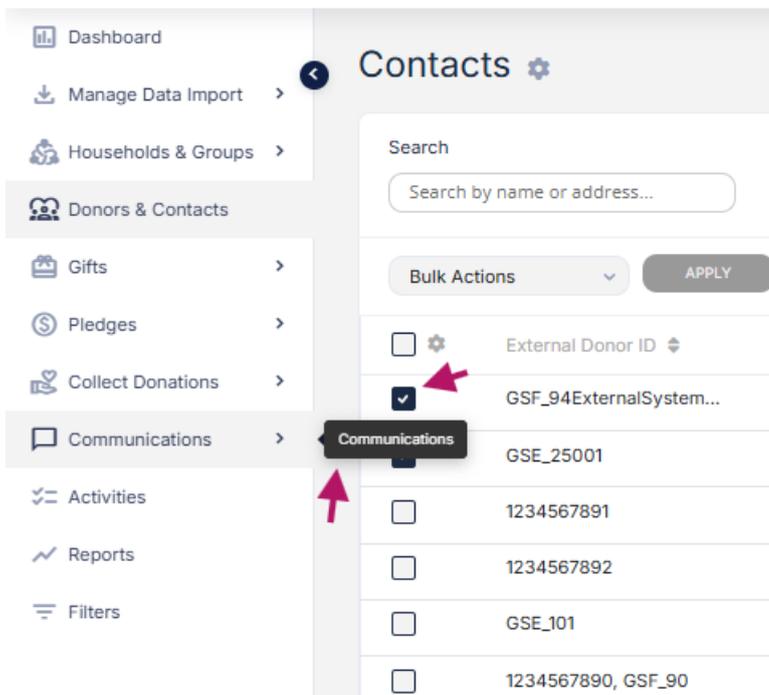
Bulk Actions

APPLY

Clear All

<input type="checkbox"/>	External Donor ID	Donor ID	Last Name	First Name	Organization Name	Total Gift Amount	Tags
<input type="checkbox"/>	GSF_94ExternalSystem...	620851		John		\$10,000.00	Employee
<input type="checkbox"/>	GSE_25001	626083	Check	New		\$1,010.00	
<input type="checkbox"/>	1234567891	613398	Doe	John		\$152.00	2023 Alumni Board Member New Parent +1
<input type="checkbox"/>	1234567892	613399	Doe	Samantha		\$153.00	
<input type="checkbox"/>	GSE_301	620648	Doe	John		\$90.00	Employee
<input type="checkbox"/>	1234567890, GSF_90	620682	Doe	Jane		\$2,390.00	Recurring Donor Board Member Employee +1
<input type="checkbox"/>	GSF_6886447	625208	Doe	John		\$0.00	
<input type="checkbox"/>	GSF_940	626083	Doe	John		\$0.00	2023 Alumni Board Member New Parent +1
Summary Totals		Count: 32					

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Who will see this new Familiar Design Interface?

The refreshed interface applies consistently across all user roles in Donor CRM:

1. **Admins**
2. **Standard Users**

(Frequently Asked Questions) FAQs:

1. Has anything changed functionality-wise within Donor CRM?

No. There have been no changes to any features, workflows, or system functionality. This release introduces a visual refresh only. All tools, actions and processes continue to work exactly as they did before—now within a more modern and consistent interface.

2. Who can see this change?

The updated interface is available to all Donor CRM users. This includes both **Admins** and

Standard Users. The refreshed design applies consistently across all user roles to ensure a unified and seamless experience.

3. Can I switch back to the old UI?

No. The previous interface is no longer available. The new Familiar UI is now the standard experience across Donor CRM, designed to provide improved visual consistency, usability and alignment with the broader product ecosystem.
