

Gift Listing Section

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Gift Listing

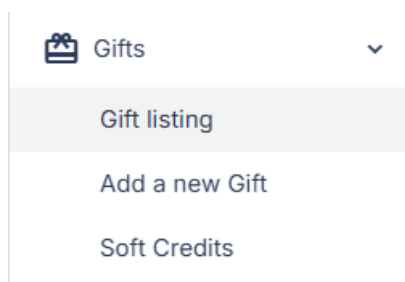
The **Gift Listing** page is the primary location for viewing and managing gift records in Donor CRM. It provides a searchable list of gifts and allows users to review gift details, apply filters, sort results, edit records (with appropriate permissions), and export data for reporting purposes.

Whether you need to research a donor's giving history, verify a recent donation, or export gift data, the Gift Listing page serves as a central workspace for gift management.

Access Gift Listing

To access the Gift Listing page:

1. Navigate to **Gifts** in the main navigation menu.
2. Select **Gift Listing**.



The page displays all gift records available to your user account based on your organization's permissions and settings.

Search for Gifts

Use the search field to quickly locate specific gift records.

You can search using information such as:

- Donor name
- Gift amount
- Gift date
- Reference number
- Fund name
- Campaign name

Search results update to display matching gift records, making it easier to locate individual donations without scrolling through the entire list.

Tip: If a search returns too many results, use an Advanced Filter to further narrow your view.

Use Advanced Filters

Advanced Filters help you narrow the Gift Listing to a specific group of gift records.

To apply an Advanced Filter:

1. Open the **Gift Listing** page.
2. Select **Advanced Filters**.
3. Choose a filter type.
4. Enter or select the desired filter value.
5. Select **Apply**.

Available Filter Options

Available filters may vary by organization but commonly include:

- Gift Date
- Gift Amount
- Fund
- Campaign
- Appeal
- Gift Type
- Payment Method
- Batch Number
- Acknowledgment Status
- Tribute Gifts
- Memorial Gifts

Important Information

- Only **one Advanced Filter can be applied at a time**.
- Applying a new Advanced Filter replaces the currently selected filter.
- If you need to view results for a different filter, clear the current filter before selecting another.

Note: The list of available filters may differ based on your organization's configuration and user permissions.

Clear an Advanced Filter

To return to the full Gift Listing:

1. Open **Advanced Filters**.
2. Remove the selected filter.
3. Select **Apply**.

The Gift Listing refreshes and displays all available gift records.

Understand the Gift Listing Grid

Each row in the Gift Listing represents a single gift record.

Depending on your organization's configuration, columns may include:

- Donor Name
- Gift Amount
- Gift Date
- Gift Type
- Fund
- Campaign
- Gift Status
- Reference Number

The grid provides a quick summary of each gift without needing to open the full record.

View Gift Details

To review a gift in more detail:

1. Locate the gift in the Gift Listing.
2. Select the gift record.

The Gift Details page may include information such as:

- Donor information
- Gift amount
- Gift date
- Payment method
- Fund designation
- Campaign association
- Appeal information
- Acknowledgment details
- Notes
- Related transactions

This information helps users verify gift records and review donor activity.

Edit a Gift Record

Users with the appropriate permissions can update gift information directly from the gift record.

To edit a gift:

1. Open the gift record.
2. Select **Edit**.
3. Make the necessary changes.
4. Select **Save**.

Important: Changes to a gift record may affect reports, donor histories, acknowledgments, and financial reconciliation processes.

Sort Gift Records

Sorting allows you to quickly organize the Gift Listing based on the information most important to you.

Common sorting options include:

- Gift Date
- Gift Amount
- Donor Name
- Gift Type
- Fund

Select a column header to sort the list by that field.

Sorting is especially useful when reviewing recent gifts or locating high-value donations.

Export Gift Data

Exporting allows you to download gift records for reporting, analysis, or recordkeeping.

To export gift data:

1. Apply a search or Advanced Filter if needed.
2. Select the **Export** option.
3. Download the file.

Note: Exported results generally reflect the records currently displayed in the Gift Listing.

Common Uses for Gift Listing

The Gift Listing page is commonly used to:

- Review recent donations
 - Research donor giving history
 - Verify gift information
 - Update gift records
 - Review fund activity
 - Export gift data for reporting
 - Support reconciliation and auditing processes
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Best Practices

- Use the search field to quickly locate known gift records.

- Apply the most appropriate Advanced Filter before exporting records.
 - Verify that the correct Advanced Filter is selected if expected results do not appear.
 - Review gift details before making edits.
 - Confirm data accuracy before exporting reports.
 - Open individual gifts on a separate tab by right clicking on the gift
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