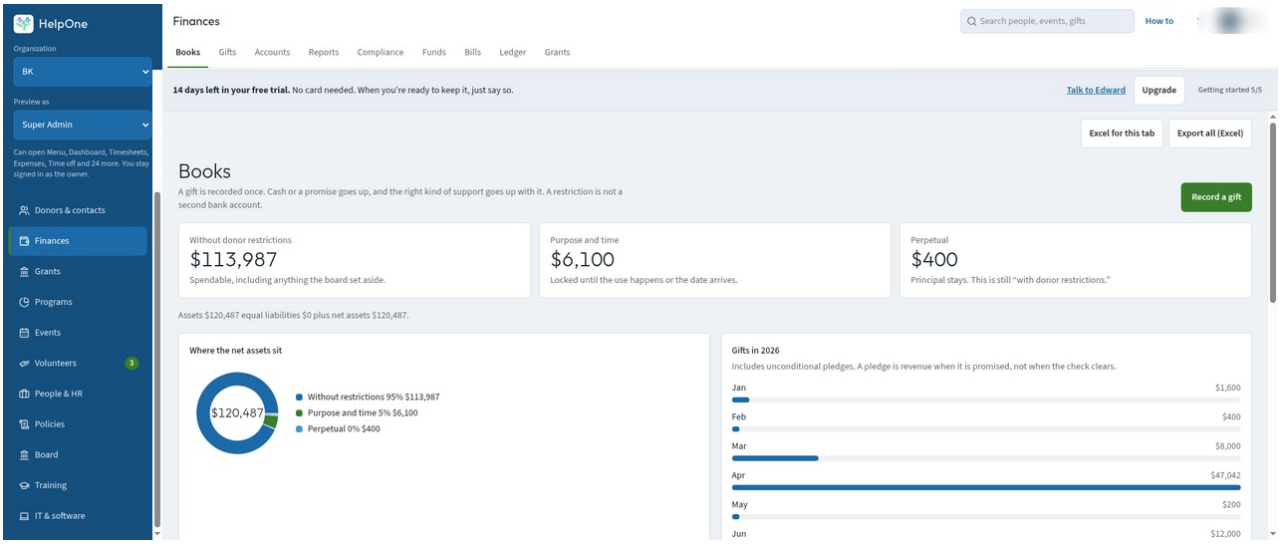
How to record a donation

Last Modified on 10/16/2026 7:03 am EDT

Record a gift

1. In the sidebar, go to Finances.
2. On the Books tab, click Record a gift.



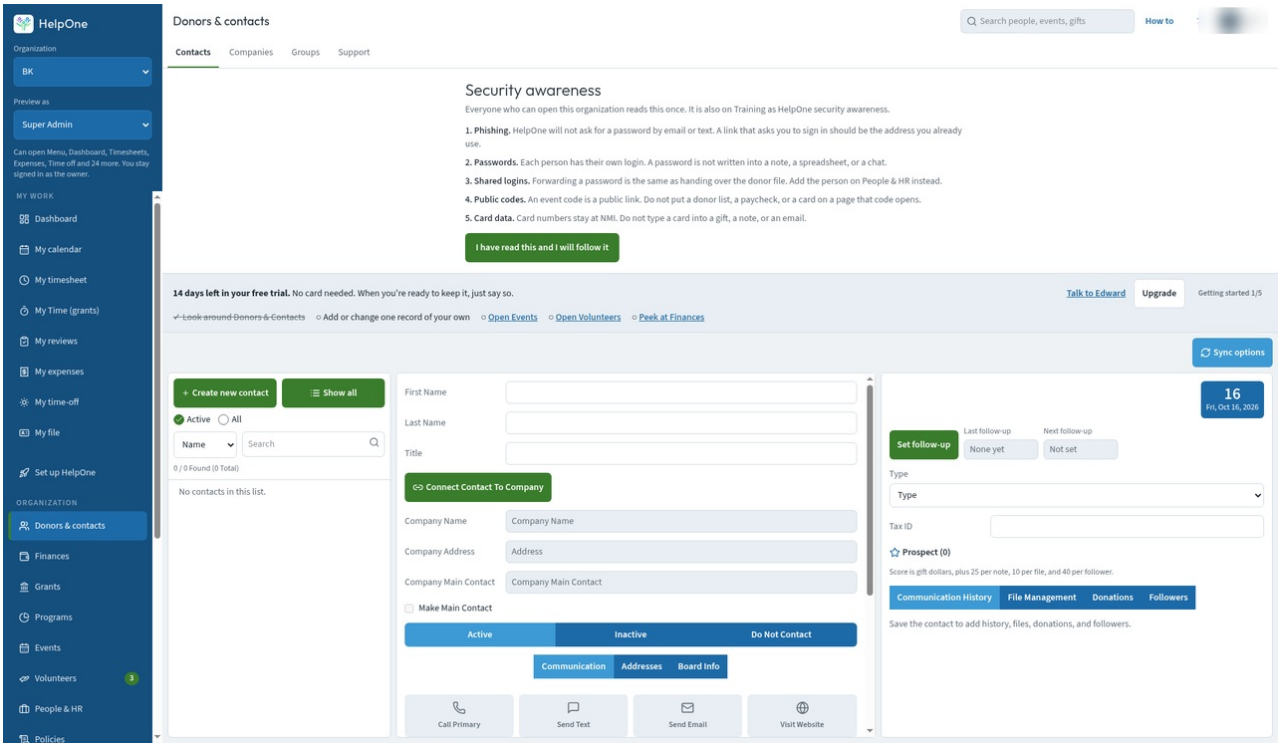
1. Enter the donor, the amount, the date, and the fund.
2. Save.

The Books tab explains the four ways a gift is recorded. Check it if you're not sure which to use.

Find gifts

Finances > Gifts lists every gift. Filter by All, No strings, Restricted, or Pledges. Search by donor, fund, or purpose.

The gift also appears under Donations on the donor's record in Donors & contacts.



Tip: Double-check the donor and fund before you save.