

# Manage Your Donations

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The main screen of the Donation tab presents a list of every donation record in your account with basic information about each donation with the option of selecting to view the donation details for more information. In this article you will learn how to Add a donation, Modify a donation, Delete a donation, Delete multiple donations and Export donations.

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## Adding a Donation

### From the Donations tab

1. You can add a Donation from this tab by selecting **Add Donation** in the top right corner of the screen.

The screenshot shows the CharityOS interface for the Donations tab. The sidebar on the left has 'CharityOS' at the top and 'Donations' selected under 'Essentials'. The main content area has a 'Donations' header with a search bar and filters for Status, Date received, and Campaign. A red box highlights the '+ Add Donation' button in the top right corner. Below the header, there are four summary cards: Total raised (\$146,431.75), Total donations (235), Total donors (44), and Average donation (\$623.11). Below these cards is a table of donation records with columns: Donor, Date Received, Amount, Fund, Campaign, Status, and Receipt. The table contains six rows of data.

Donor	Date Received	Amount	Fund	Campaign	Status	Receipt
Richard Burke	11/13/2025	\$15.25	Wellness Initiative F...		Completed	KLS3212
Rachel Green	10/13/2025	\$1,150.25	Farming		Completed	TX060225
Rachel Green	10/13/2025	\$150.25	New Building	New Building	Pending	69510
Rachel Green	10/13/2025	\$150.25	Farming		Pending	TX69510
Sarah Stevenson	05/27/2025	\$50.00	New Building		Completed	WELL00000220
Sean Fafinski	05/27/2025	\$100.00	General		Completed	WELL00000221

Add donation from Donations Tab

2. Fill out the mandatory and necessary fields on the three-step form and select Save.

- **New donation:** Donor and donation information such as amount, date received, fund, etc.

### New donation

Donor \*

Tracy McConnell

X

Total amount \*

\$ 200

Payment method \*

Credit Card

Date received \*

05/13/2025

Fund \*

1/3

Next

- **Tax receipt & dedication information:** Include dedication or whether the donation has already been receipted/is excluded from receipting.

### Tax receipt & dedication information

Non-tax deductible amount

\$

☐ Exclude from tax receipting

☐ Already receipted

☐ In Memory of/In Honour of

2/3

Back

Next

- **Additional donation details:** Donation source, fee amount, additional notes.

### Additional donation details

Source \*

External ID

Thank You date

Fee amount

Notes

3/3

Back Save

## From a Contact Profile

1. Go to the Contacts tab.
2. Use the search function to find and select the contact you'd like to add a donation to.
3. On the contact profile page, click on the **Add Donation** button.

CharityOS

Essentials

Contacts

Donations

Tracy McConnell

Key information

Primary Email  
tracy.mcconnell@himym.com

Primary Phone (Mobile)  
+1 (506) 555-7878

Location  
Fredericton, NB

Opt-outs

Do not mail

Donations Profile

Total lifetime donations  
**\$420**  
Since April 10th, 2025

Last donation  
**\$200**  
May 13th, 2025

Largest donation  
**\$200**  
May 13th, 2025

Number of donations  
**4**  
All-time

+ Add Donation

Date	Amount	Campaign	Status	Received
05/13/2025	\$200.00		Completed	No
05/06/2025	\$100.00		Completed	Yes
05/05/2025	\$20.00		Completed	Yes
04/10/2025	\$100.00	New Building	Completed	Yes

Show 10 of 1

Add donation from a Contact Profile

4. The Donor field will be pre-selected with that Contact's name. Complete all required fields on the three-step form, then click **Save**.

New donation

Donor \*

Tracy McConnell

Total amount \*

\$

Payment method \*

Date received \*

MM/DD/YYYY

Fund \*

Campaign

1/3

Next

## Modifying a Donation

1. Go to the Donation Tab.
2. Use the search function to find and select the donation you wish to edit.
3. On the donation details page, click on any of the **Edit** options to modify the fields in that section.

CharityOS

Essentials

Contacts

Donations

<

>

Tracy McConnell

\$200.00

Received on May 13, 2025

Fund: General

Delete donation

Issue tax receipt

Donation details

Donation ID

ID-051679

Payment method

Credit Card

Campaign

-

Recurring

No

Edit

Additional details

Net amount

\$200.00

Completed

Fee amount

\$0.00

Source

Event

Thanked on

Not yet thanked

Issued tax receipt No.

-

Edit

Status

Edit

Notes

Edit

Non-tax deductible details

Non-tax deductible amount

\$0.00

Edit

Dedication

Edit

No notes available. Click [here](#) to add notes about this donation.

Modifying a donation

5. Once you're finished, click **Save** to apply your changes.

## Deleting a Donation

Please note that once a donation has been receipted, the donation can no longer be deleted.

1. Go to the Donations Tab.
2. Use the search function to find and select the donation you wish to delete.
3. On the donation details page, click on **Delete donation** located in the top-right corner of the page.

The screenshot shows the CharityOS interface. On the left is a sidebar with 'CharityOS' at the top, followed by 'Essentials', 'Contacts', and 'Donations' (which is highlighted). The main content area shows details for a donation from 'Tracy McConnell' for '\$200.00', received on 'May 13, 2025', with a 'Fund: General'. At the top right of the details section, there are two buttons: 'Delete donation' (highlighted with a red box) and 'Issue tax receipt'. Below this, the 'Donation details' section includes fields for 'Donation ID' (ID-051679), 'Payment method' (Credit Card), 'Campaign' (-), and 'Recurring' (No). The 'Additional details' section shows 'Net amount' (\$200.00), 'Fee amount' (\$0.00), 'Source', 'Event' (Not yet thanked), and 'Issued tax receipt No.'. The 'Status' is 'Completed'. The 'Notes' section is empty with a message: 'No notes available. Click here to add notes about this donation.' At the bottom, there is a 'Dedication' field. A large 'Delete donation' button is visible at the very bottom of the screen.

4. Confirm that you want to delete the donation.

## Bulk delete Donations

1. Go to the Donations tab.
2. Use the search function to find and select the donations you'd like to delete.
3. Select the checkboxes next to the donations.
4. Under **Bulk Actions**, select *Delete donations*.

CharityOS

Essentials

Contacts

Donations

Donations

Search by name, email or receipt No.

Status

Date received

Campaign

+ Add Donation

Total raised \$146,431.7

Total donations 235

Total donors 44

Average donation \$623.11

2 donations are selected. [Select all 235 donations](#)

Donor	Date received	Amount	Fund	Campaign	Status	Receipt
<input checked="" type="checkbox"/> Chandler Bing	03/04/2024	\$1,300.50	Farming	New Building	Cancelled	
<input checked="" type="checkbox"/> Phoebe Buffay	09/02/2024	\$175.00	Farming		Cancelled	
<input type="checkbox"/> Rachel Green	03/30/2025	\$1,150.25	Farming		Pending	
<input type="checkbox"/> Rachel Green	03/30/2025	\$1,150.25	Farming		Pending	
<input type="checkbox"/> Richard Burke	02/12/2024	\$30.00	General	Giving Tuesday 2024	Pending	

Bulk delete donations

5. Confirm that you want to delete the selected donations.

## Exporting Donations

1. Go to the Donations tab.
2. Select the checkboxes next to the Donations you wish to export. To export all donations, click on **Select all # donations** that appears once at least 1 donation checkbox has been selected.
3. From the **Bulk Actions** dropdown menu, choose *Export Donations*.
4. The exported donations will be download as a .CSV file onto your computer.

CharityOS

Essentials

Contacts

Donations

Donations

Search by name, email or receipt No.

Status

Date received

Campaign

+ Add Donation

Total raised \$146,431.7

Total donations 235

Total donors 44

Average donation \$623.11

10 donations are selected. [Select all 235 donations](#)

Donor	Date received	Amount	Fund	Campaign	Status	Receipt
<input checked="" type="checkbox"/> Richard Burke	11/13/2025	\$15.25	Wellness Initiative F...		Completed	KLS3212
<input checked="" type="checkbox"/> Rachel Green	10/13/2025	\$1,150.25	Farming		Completed	TX060225
<input checked="" type="checkbox"/> Rachel Green	10/13/2025	\$150.25	New Building	New Building	Pending	69510
<input checked="" type="checkbox"/> Rachel Green	10/13/2025	\$150.25	Farming		Pending	TX69510
<input checked="" type="checkbox"/> Sarah Stevenson	05/27/2025	\$50.00	New Building		Completed	WELL00000220

Exporting donations

