# **Client Settings**

Last Modified on 06/23/2025 1:32 pm EDT

The **Client Settings** can be found by clicking on your name in the top right, and selecting *Client Settings* from the drop down.

### General Settings

Under **General Settings**, you can:

- Establish the date format.
- Enable the ability for donors to help cover the credit card processing fees on donation links.
- Upload an organization logo for letters and receipts.

GENERAL SETTINGS	CUSTOM FIELDS	3RD PARTY INTEGRATIONS	DATA SETTING
te format	Customer since: Jun 22, 2023	Organization Lo	go
Default 🗸	Pricing plan: Champion With Done	or Crm	//
Short: 06/23/2025	Organization Postal Code	2	<b>X</b>
Mid: Jun 23, 2025 Long: June 23, 2025	45150		
nors cover credit card processing fees			
ON ON			
SAVE		EDIT +A	DD NEW

### **Custom Fields**

In the **Custom Fields** section you can add, edit or manage the layout of the custom fields in GiveSmart Donor CRM.

GENERAL SETTINGS		CUSTOM FIELDS	3RD PARTY INTEGRATIONS			DATA SETTINGS			
Custom fiel	ds					MANAGE +ADD NEV			
Parent section	Screen section	Field name	Field type	Width	Required	View only			
Gifts/Pledges	General	MIP Distribution Code	Dropdown	1/2		EDIT			
Gifts/Pledges	General	Fiscal Year	Dropdown	1/2		EDIT DELETE			
Gifts/Pledges	general	Payment Type	Dropdown	1		EDIT DELETE			
Gifts/Pledges	general	Honoree Name	Text	1/3		EDIT DELETE			
Gifts/Pledges	general	Tribute Type	Dropdown	1/3		EDIT DELETE			
Gifts/Pledges	general	Tribute Note	Text	1/3		EDIT DELETE			

### 3rd Party Integrations

The 3rd Party Integrations section is where external API keys can be connected to Donor CRM.

• To locate the API key for the DonorSearch Integration, click here.

#### Data Settings

#### **Review Settings**

You can choose how incoming data is handled. Either:

- Review All Incoming Data (Recommended): All data, whether manually uploaded or automatically received from GiveSmart Events & Fundraise, will first be placed in a holding table for your review.
- Import Automatically: Data will be imported directly into Donor CRM without review.

If you choose to review data, go to the **Data Import & Review** tab in the left-hand navigation, then select the **Import Review** section to view and manage the data in the holding table.

Review Settings
By default, your imported data will wait in a "holding table" for your review before being brought fully into the system. This includes data coming in through Automated Data Sync as well as any manual imports. You can <u>review your imports here</u> .
We strongly recommend this manual review. If you wish, however, you may change your settings to import automatically, without review. <b>Please note: Bypassing manual review could result in data with errors or omissions.</b>
Review manually (RECOMMENDED): I wish to manually
review my data as the final step of the import.
Import without review: I understand the implications. I wish
to bypass manual review and automatically import my data
into the system.

## Notifications

Email notifications are sent to Admin users based on the option selected in the Review Settings (detailed above).

Notifications	
Email notifications are sent based on your review settings above. The review manually setting send both <i>Import Awaiting Review</i> and <i>Bulk Import Complete</i> emails. The import without revisetting will send only the <i>Bulk Import Complete</i> emails. You can find descriptions of each email below:	will ew I
Import Awaiting Review - Data needs manual review	
Bulk Import Complete - Data is confirmed and imported into the system	
More information on Client Settings Controls.	
Would you like for Admin user(s) to receive emailed notifications when this happens?	
Yes, please alert when data is awaiting review or imported.	
No, do not alert when data is awaiting review or imported.	
Who should receive email notifications (status and error messages) about imports?	
Kirsten Primozic ×	
Select Admins	~

Select who you would like to receive these notifications. Choose between:

"Yes, please alert when data is awaiting review or imported."

- When this option is selected:
  - Email notifications **will be sent** when new data is awaiting review or has been uploaded.
  - You must specify who should receive these alerts.
  - From the dropdown, select All Admins or select individual admins.

Who should receive email notifications (status and error messages) about imports?	
Kirsten Primozic ×	
Select Admins	^
All Admins	
Kirsten Primozic - kirsten.primozic@communitybrands.com	

"No, do not alert when data is awaiting review or imported."

- When this option is selected:
  - No email alerts will be sent to admins when new data is awaiting review.
  - No confirmation emails will be sent when data is uploaded.
  - **Important:** If this option is selected and "Review Data Manually" is enabled, admins must **manually check** the system regularly for new data in the holding table. **No notifications or alerts will be sent**.

### Notification Examples

#### **Import Awaiting Review!**

- Is sent only when the following settings are selected:
  - Review Manually
  - Yes, please alert when data is awaiting review or imported
- When is this sent?
  - When data flows through the automated data sync from GiveSmart Fundraise or Events to Donor CRM through the daily sync
  - When data is manually imported via the Data Import & Review tab

Import Awaiting Review!									
GC	GiveSmart Donor CRM <notifications_crm@mail.donorcrm.givesmart.com></notifications_crm@mail.donorcrm.givesmart.com>	■ ~ 💼 🔗 🔡 🗠 Sat 7/13/2024 3:05 AM							
	9 transactions have been imported into GiveSmart Suite Demo and are awaiting review. To finalize import, please visit Data Import & Review.	-							
	$\leftarrow Reply  \textcircled{\ } Reply  \overrightarrow{\ } Forward$								

#### Name changes report

- When is this sent?
  - When "Yes, please alert when data is awaiting review or imported." is selected.
  - When data flows through the automated data sync, and a name change to an existing record has occurred. More **here**.
- Can the Name changes report email be turned off?
  - When "Yes, please alert when data is awaiting review or imported." is enabled in your Client Settings, you **cannot** opt individual Admins out of receiving the Name Changes Report email.

Would you like for Admin user(s) to receive emailed notifications when this happens?

Yes, please alert when data is awaiting review or imported.

No, do not alert when data is awaiting review or imported.

As a workaround, Admins who do not wish to receive this notification (or any email notifications) can have their access level changed to "**User**" from the User Management screen. Those who remain with Admin privileges will have access to the Client Settings, and the ability to add and manage new fields, codes, and other admin users.

**NOTE:** Only those with **Admin** privileges will continue receiving the Name Change Report emails.

#### **Bulk Import Complete!**

• Is sent only when the following settings are selected:

0	Review	Manually	-or-	Import	Without	Review
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- Yes, please alert when data is awaiting review or imported
- When is this sent?
  - When data is imported manually and has either been reviewed or the review has been bypassed

Bulk I	Bulk Import Complete!								
GC	GiveSmart Donor CRM <notifications_crm@mail.donorcrm.givesmart.com> To: kirprimo Importing contacts has been completed successfully. We have imported 11 records, including: 4 records created, 7 records updated ar</notifications_crm@mail.donorcrm.givesmart.com>	co and 0 re	ecord	لائم s failed	A.	<b>•</b> ~	Thu 6/1	⊗   <b>(</b> 3/2024	3   ••• 12:49 PM
	rorwaru repiy an rorwaru								

#### Import Failed - Error Details

• Is sent only when the following settings are selected:

External Donor ID, Contact Last Name, Contact Type, Primary Address 1

External Donor ID, Contact Last Name, Contact Type, Primary Address 1

- Review Manually -or- Import Without Review
  - Yes, please alert when data is awaiting review or imported
- When is this sent?

6

7

• When data is manually imported and an error occurs

Import Failed - Error Details										
GC	GiveSmart Donor To: kirp We couldn't impo for further details	CRM <notifications_crm@mail.donorcrm.givesmart.com> </notifications_crm@mail.donorcrm.givesmart.com>	below. Please fix the errors and reimport ag	🙂 🤇	← ≪ ease ref	fer to th	ne Imp	Thu 6/	8 13/2024 1	) 2:02 PM is file
	Row Number	Columns								
	2	External Donor ID, Contact Last Name, Contact Type, Primary Address 1								
	3         External Donor ID, Contact Last Name, Contact Type, Primary Address 1           4         External Donor ID, Contact Last Name, Contact Type, Primary Address 1									
	5	External Donor ID, Contact Last Name, Contact Type, Primary Address 1								