Client Settings

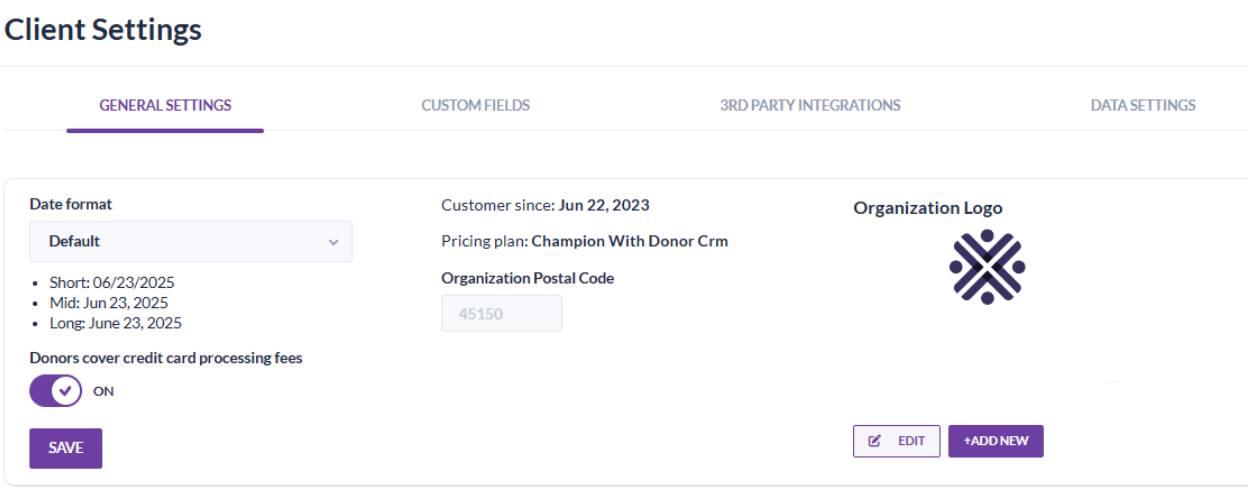
Last Modified on 06/23/2025 1:32 pm EDT

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

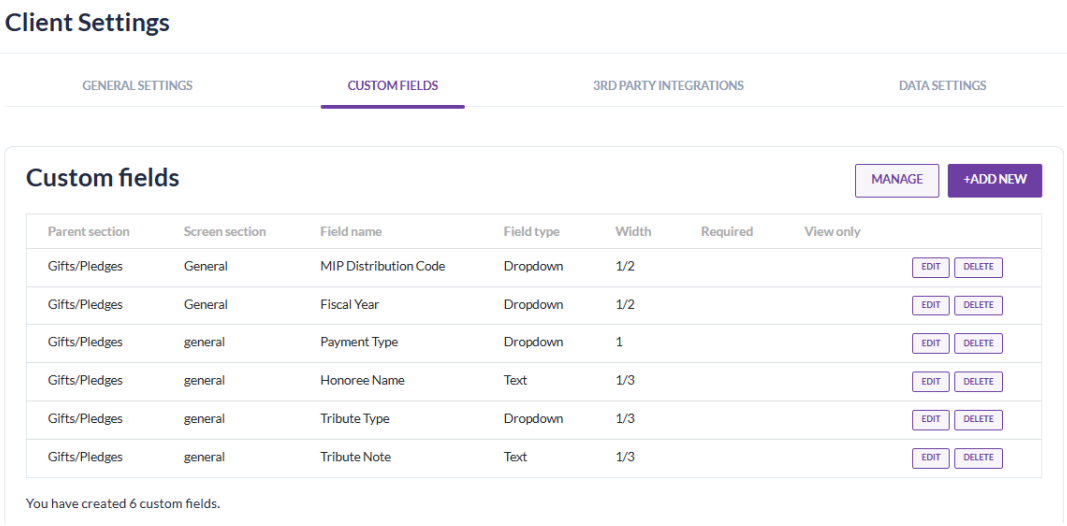
Under **General Settings**, you can:

- 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.



Custom Fields

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



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**.

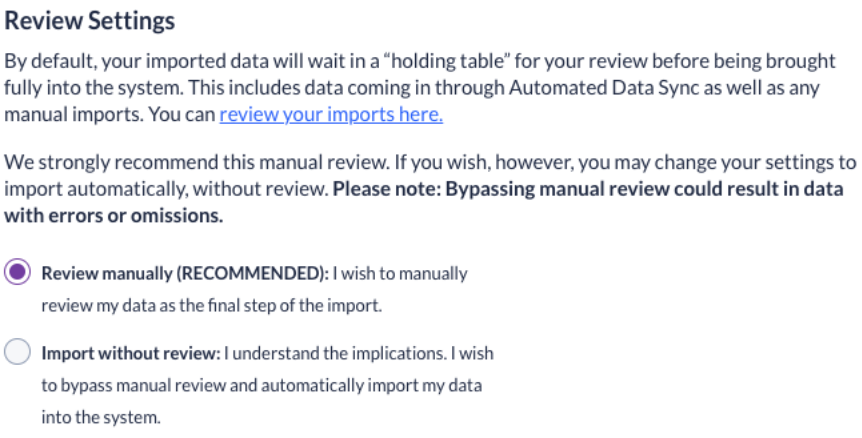
Data Settings

Review Settings

You can choose how incoming data is handled. Either:

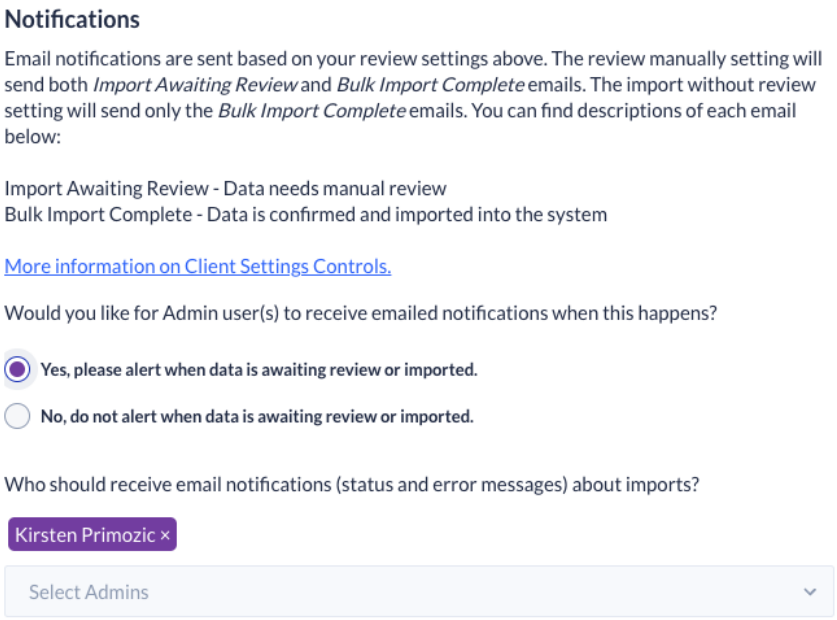
- **Review All Incoming Data (Recommended):** All data, whether manually uploaded or automatically received from GiveSmart Events & Fundraise, will first be placed in a holding table for your review.
- **Import Automatically:** Data will be imported directly into Donor CRM without review.

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.



Notifications

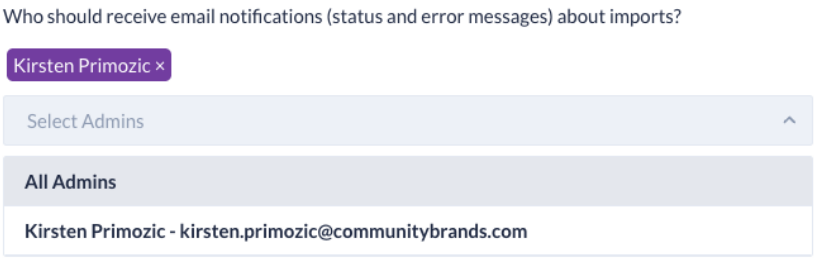
Email notifications are sent to Admin users based on the option selected in the Review Settings (detailed above).



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.



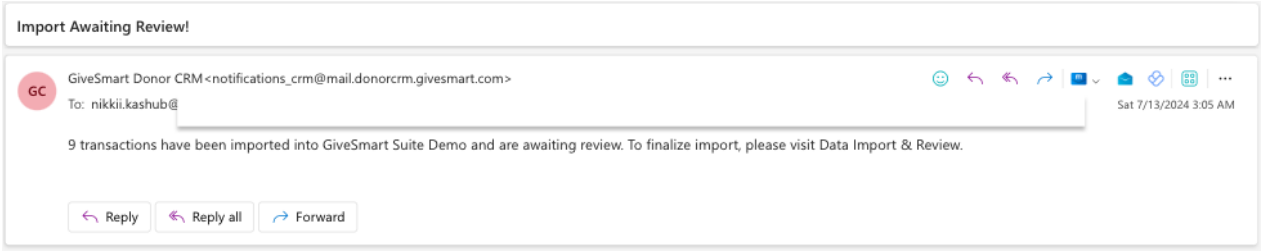
"*No, do not alert when data is awaiting review or imported.*"

- 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

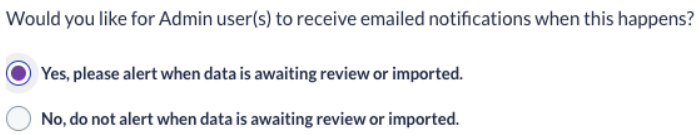
Import Awaiting Review!

- 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



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.



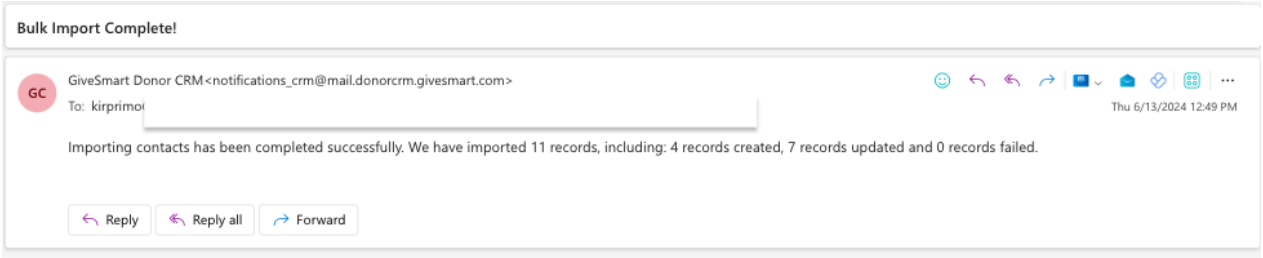
As a workaround, Admins who do not wish to receive this notification (or any email notifications) can have their access level changed to "**User**" from the User Management screen. Those who remain with Admin privileges will have access to the Client Settings, and the ability to add and manage new fields,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

    - Review Manually -or- Import Without Review
    - 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



Import Failed - Error Details

- Is sent only when the following settings are selected:
    - Review Manually -or- Import Without Review
    - Yes, please alert when data is awaiting review or imported
- When is this sent?
    - When data is manually imported and an error occurs

