Client Settings

Last Modified on 06/27/2024 1:07 pm EDT

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

General Settings

Under General Settings, you can establish the date format, view subscription information and add an organizational logo.

Custom Fields

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

3rd Party Integrations

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

Data Settings

Choose to review all incoming data (**Recommended**) from manual uploads and data flowing in automatically from GiveSmart Events & Fundraise or choose to allow the data to be imported automatically without being reviewed.

When opting to review all data, select between all Admin or a single Admin who will receive the email alerts that new data is available for review.

Email Example