

# Client Settings

Last Modified on 07/30/2024 4:45 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

### Review 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, your data will be placed in a 'holding table' for your review before being brought fully into Donor CRM. Data placed in the holding table can be reviewed by selecting the **Data Import & Review** tab from the left navigation, and select the **Import Review** container.

## 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 [review your imports here](#).

We strongly recommend this manual review. If you wish, however, you may change your settings to import automatically, without review. **Please note: Bypassing manual review could result in data with errors or omissions.**

- 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 based on the option selected in the Review Setting (review manually or import without review).

### Notifications

Email notifications are sent based on your review settings above. The review manually setting will send both *Import Awaiting Review* and *Bulk Import Complete* emails. The import without review setting will send only the *Bulk Import Complete* emails. You can find descriptions of each email below:

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.
  - If selected, choose who you would like to review the data.
    - From the dropdown, select All Admin or select single or multiple admin.
    -

Who should receive email notifications (status and error messages) about imports?

Kirsten Primozic x

Select Admins ^

All Admins

Kirsten Primozic - kirsten.primozic@communitybrands.com

- **NOTE:** When selecting multiple admin, the names of the admin will appear above the dropdown. To remove a selected admin, click the 'x' next to their name.

- No, do not alert when data is awaiting review or imported.
  - When this option is selected, no emails will be sent alerting admin that there is data to be reviewed nor a confirmation email of uploaded data.

- - **Important:** When selecting this option when Review Data Manually has been selected, Admin will have to create a cadence for themselves of going in and regularly checking if there is data to be reviewed and is currently in the holding table. There will NOT be any notification or alert sent to admin when this option is selected.

## 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!

GiveSmart Donor CRM <notifications\_crm@mail.donorcrm.givesmart.com>  
To: nikkii.kashub@  
9 transactions have been imported into GiveSmart Suite Demo and are awaiting review. To finalize import, please visit Data Import & Review.

Reply Reply all Forward

### Name Change Report

- 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 flows through the automated data sync from GiveSmart Fundraise or Events to Donor CRM through the daily sync and a name change to an existing record has occurred due to the sync

### 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

**Bulk Import Complete!**

GiveSmart Donor CRM <notifications\_crm@mail.donorcrm.givesmart.com>  
 To: kirprimoi

Importing contacts has been completed successfully. We have imported 11 records, including: 4 records created, 7 records updated and 0 records failed.

Reply   Reply all   Forward

### 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

**Import Failed - Error Details**

GiveSmart Donor CRM <notifications\_crm@mail.donorcrm.givesmart.com>  
 To: kirp

We couldn't import the file (Donor\_CRM\_Contacts\_Template copy.csv) because of the errors below. Please fix the errors and reimport again. Please refer to the Import Instructions file for further details and requirements for importing.

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