

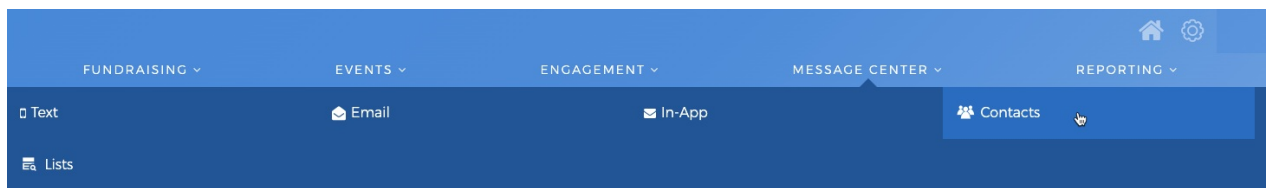
Edit a Supporter's Information

Last Modified on 06/02/2022 11:11 am PDT

Your constituent's details are stored in GiveSmart Fundraise by their Phone Number. If anything else changes, such as they have a new address or they've changed their name, you can modify their record yourself.

Find the donor's record

To change constituent's information, first, go to Message Center > Contacts



Here you can search for a contact in different ways: Contact information, date range amounts, etc. Since you usually are looking for a specific supporter, looking for them through their name, email and/or phone will probably be the most efficient.

Click **Search** at the bottom of the page when ready.

[← Back to Dashboard](#)

Search Contacts

Search by fields and/or activities to build a new list. For example, search for all major donors (gave a gift above \$500)

Contact Information

| | | |
|---|---|---|
| First Name <input type="text" value="First Name"/> | Last Name <input type="text" value="Last Name"/> | Email <input type="text" value="Email"/> |
| Phone <input type="text" value="Phone"/> | <input type="checkbox"/> Show only contacts with a verified mobile number | |

Activities

| | | |
|--|--|--|
| Campaign <input type="text" value=""/> | Keyword <input type="text" value=""/> | Form <input type="text" value=""/> |
| <small>Select a campaign to filter by its keywords</small> | | <small>Select a campaign and/or keyword to filter by its forms</small> |

Individual Gift

| | | |
|--|--|---|
| Amount Min \$ <input type="text" value="Amount Min"/> | Amount Max \$ <input type="text" value="Amount Max"/> | Frequency <input type="text" value="All"/> |
|--|--|---|

Gift Date

| | |
|---|---|
| Start Date <input type="text" value="02/23/2022"/> | End Date <input type="text" value="03/02/2022"/> |
|---|---|

Location

| | | |
|---|---|---|
| City <input type="text" value="City"/> | State <input type="text" value="State"/> | Zip <input type="text" value="Zip"/> |
|---|---|---|

On the next page, you will see the results of your search based on your search options. Find the person's name and information in the list at the bottom.

Click on their name. Their record will appear in a new tab in your browser.

Search Criteria (click to toggle)

02/23/2022 - 03/02/2022 (8 Days)

Search Options

First Name: Liam **List size:** 1

Last Name: Smith

Frequency: All

| Name | Email | Phone | Address | State | Zip | Actions |
|----------------------------|---------------------------------|-----------------|-------------------------|-------|-------|---------|
| Liam Smith | scouchman+demo1@mobilecause.com | 1(888) 661-8804 | 27001 Agoura Road, 350A | CA | 91301 | ... |

Edit the Profile

You can browse through this record to find various pieces of information about your supporter and how they have interacted with you through your GiveSmart Fundraise account.

Click **Edit** in the upper right to make changes.

Donor Profile

 1(888) 661-8804 | scouchman+demo1@mobilecause.com
Basic Edit
First Name Liam

Make any changes you would like to the person's profile.

Click **Save** in the upper right when you are done

You cannot change the supporter's phone number or email address.

Donor Profile

 1(888) 661-8804 | scouchman+demo1@mobilecause.com
Basic Save Cancel
First name
Liam
Middle name

Last name
Smith

Close the browser tab when you are done with their record.