

CRM: Edit an Individual Record

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Watch this video to learn how to edit a record in your GiveSmart Donor CRM account.

Steps to edit a contact record

1. In the **Search** bar in the upper left corner, type the name of the record
2. Select the record from the dropdown list
3. Scroll to locate editable fields
4. Once complete, click the **Save Icon** in the lower right corner



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