CRM: Client Settings

Last Modified on 08/09/2023 1:36 pm PDT

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.