CRM: Add a New Contact Record

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Watch this video to learn how to add a new contact to your GiveSmart Donor CRM account.

Steps to add a new contact record

1. From the Quick Actions container within the dashboard, click **ADD NEW CONTACT** button
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2. Enter New Contact Details
    - If a new contact is an Organization, toggle to 'Organization' in the upper right corner
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3. Select Primary Email Address
    - If the contact has multiple email addresses, select which email will be used as the primary email. Donor CRM will default the 1st email entered as the primary email address.
