

# CRM: Automated Data Sync

Last Modified on 09/15/2023 1:51 pm PDT

Automatically sync your donor and transaction data from GiveSmart Events & Fundraise to GiveSmart Donor CRM. This unidirectional sync provides accurate and actionable insights of your GiveSmart fundraising activity and reduces administrative overhead.

Additional information can be found in the [Automated Data Sync FAQs](#).

## Daily Sync

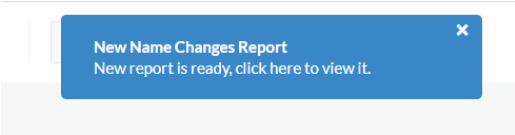
Each morning between 3-5am ET, new/modified donor data and settled/refunded transaction data from GiveSmart Events & Fundraise acquired since the last sync will be automatically transferred to GiveSmart Donor CRM.

## Synced Data

### Donor Data

New and modified donor data will be automatically transferred once the donor has transactional activity. Modifications to existing donor names will automatically update the profiles in GiveSmart Donor CRM. Modifications to a donors contact information including email, phone or mailing address will append to the existing donor profile in Donor CRM.

When a name change occurs due to the automated sync, Admin will receive an **email** and a popup will appear the next time they visit Donor CRM.

A screenshot of a blue notification popup with a close button (X) in the top right corner. The text inside the popup reads: "New Name Changes Report" followed by "New report is ready, click here to view it." on the next line.

New Name Changes Report  
New report is ready, click here to view it.

**Tip:** Have an Admin that you don't want to receive these notifications? Change their access type to 'User', so they still have access to all admin functionality other than client settings and name change notifications.

To view a record of the name change, select:

- Donors & Contacts > Merging Center
- Select Check Name Changes from Automated Imports

- Select the report to view the name change

**NOTE:** Donors who participate in fundraising activities in both GiveSmart Events & Fundraise will need to be merged in the Merging Center in GiveSmart Donor CRM so they can be recognized as the same individual. This will occur the 1st time they participate in a fundraising activity in both GiveSmart modules, and most often will not need to be merged again as long as their name and contact information remains the same.

- **GiveSmart Events**

- DONOR\_ID
- FIRST\_NAME
- LAST\_NAME
- CREATED\_AT
- ANONYMOUS
- CONTACT\_METHODS\_DICT.CELL\_PHONE
- CONTACT\_METHODS\_DICT.EMAIL
- ADDRESSES.0.ADDRESS1
- ADDRESSES.0.CITY
- ADDRESSES.0.STATE\_PROVINCE
- ADDRESSES.0.POSTAL\_CODE

- **GiveSmart Fundraise**

- DONOR\_ID
- FIRST\_NAME
- LAST\_NAME
- CREATED\_AT
- CONTACT\_METHODS\_DICT.CELL\_PHONE
- CONTACT\_METHODS\_DICT.EMAIL
- ADDRESSES.0.ADDRESS1
- ADDRESSES.0.CITY
- ADDRESSES.0.STATE\_PROVINCE
- ADDRESSES.0.POSTAL\_CODE

## Transaction Data

Newly settled and modified/refunded transaction data will be automatically transferred. Refunds and modifications to existing transactions should be made in either GiveSmart Events or Fundraise.

Transactions with a payment type of Cash, Check, Other (in GiveSmart Events) or entered as an Offline Donation (in GiveSmart Fundraise) will be transferred during the next sync. Transactions with a payment type of Credit Card will need to reach a status of 'Settled' with our card processing partner, CardConnect, prior to this transaction syncing to GiveSmart Donor CRM. This process will typically take 24-48 hours, but please note that delays can occur transactions are reviewed by the CardConnect Fraud Department.

**IMPORTANT:** Transaction data that originated in either GiveSmart Events or Fundraise should **not** be modified directly in GiveSmart Donor CRM. Any transaction modifications or refunds should be handled in the module it originated from.

- **GiveSmart Events**

- TRANSACTION\_ID
- DONOR\_ID
- GIFT\_DATE
- TY\_DATE
- THANK\_YOU\_METHOD
- GIFT\_AMOUNT
- SOLICIT\_NAME
- SUB\_SOLICIT\_NAME
- GL\_NAME
- CAMPAIGN\_NAME
- NOTES
- FMV

- **GiveSmart Fundraise**

- TRANSACTION\_ID
- DONOR\_ID
- GIFT\_DATE
- TY\_DATE
- THANK\_YOU\_METHOD
- GIFT\_AMOUNT
- SOLICIT\_NAME
- SUB\_SOLICIT\_NAME
- GL\_NAME
- CAMPAIGN\_NAME
- CAMPAIGN\_ID
- FMV

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## Credit Card Transaction Status

Credit card transaction statuses can be viewed in both GiveSmart Events and Fundraise.

### GiveSmart Events

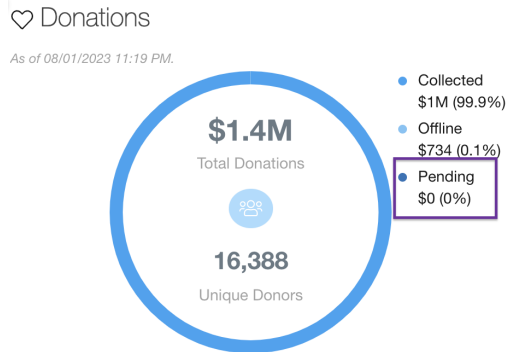
Once a credit card transaction has been settled it will appear in the Reports > Overview > **Batch Report**. To view all credit card transactions and their current status, go to:

- Reports > Overview > **Payments Received** > Credit
- View the Batch column
  - If a batch number appears, this payment has been settled
  - If no batch number is present this credit card transaction is still pending approval through CardConnect

Time	Type	More Info	Card Name	Amount	First Name	Last Name	Bid #	Phone Number	Notes	Batch
Aug 01, 2023 1:51:21 PM	Credit	VISA 1234	Julie Smith	\$190.00	Julie	Smith	123	+11231231234	Approval	#1234
Aug 01, 2023 1:51:22 PM	Credit	VISA 4567	Martin Charlamán	\$135.00	Martin	Charlamán	444	+11231231222	Approval	#1234
Aug 02, 2023 9:22:21 AM	Credit	MC 1234	Eliza Gomez	\$85.00	Eliza	Gomez	312	+11231231223	Approval	

## GiveSmart Fundraise

Credit card transactions that have not been settled on GiveSmart Fundraise will appear in a 'Pending' status. A quick glance at any pending transactions can be seen on the dashboard.



To view a detailed list of all credit card transactions or matching donations currently in a Pending status go to:

- Existing Reporting > [Search Transactions](#)
- Select Pending under Credit Card
- Select Pending under [Matching Donations](#) (if applicable)
- Enter the date range (EX: Last 7 days)
- Select Search

### Search Transactions

Report Builder | Saved Reports

Transaction Type

Credit Card     Paypal     Matching Donations     Offline ⓘ     Non Payment ⓘ

Collected     Collected     Collected

Pending     Refunded     Pending

Refunded     Pending

Voided

A detailed list of all credit card transactions that are pending approval from CardConnect can be viewed.

## Synced Data Examples

### Multiple Item Types

## Gifts

+ ADD NEW

External System	Donor	Amount	FMV	TDA	Solicitation Method	Source ID	Sub Solicitation	General Ledger
GS Fundraise	<a href="#">Kirsten Kelley</a>	\$44.00			2023 @ Holiday Weekend Giveaway "Fireworks 2023" - Fundraising	23336	donation	
GS Events	<a href="#">Kirsten Kelley</a>	\$1.00		\$1.00	Cardinal Health, LLC_AUCTION_Cardinal Health GSE	150537	live	
GS Events	<a href="#">Kirsten Kelley</a>	\$20.00			Cardinal Health, LLC_AUCTION_Cardinal Health GSE	150537	raffle	
GS Events	<a href="#">Kirsten Kelley</a>	\$15.00		\$15.00	Cardinal Health, LLC_AUCTION_Cardinal Health GSE	150537	donationItem	
GS Events	<a href="#">Kirsten Kelley</a>	\$25.00	\$15.00	\$10.00	Cardinal Health, LLC_AUCTION_Cardinal Health GSE	150537	instant	
GS Events	<a href="#">Kirsten Kelley</a>	\$4.00		\$4.00	Cardinal Health, LLC_AUCTION_Cardinal Health GSE	150537	vote	
GS Events	<a href="#">Kirsten Kelley</a>	\$195.00	\$105.00	\$90.00	Cardinal Health, LLC_AUCTION_Cardinal Health GSE	150537	tickets	

Average: \$43.43   Median: \$20.00

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## Original + Recurring Donations

Date	Type	External System	Donor	Amount	FMV	TDA	Solicitation Method	Source ID	Sub Solicitation	General Ledger	Campaign
Jul 27, 2023	Other	GS Events	<a href="#">Victoria RecurringDonation</a>	\$42.00		\$42.00	AUCTION_Donation Event	150560	cashDonations		
Jul 13, 2023	Other	GS Events	<a href="#">Victoria RecurringDonation</a>	\$42.00		\$42.00	Feb 8 Dry Run_AUCTION_GSEvents Without Tax	150561	cashDonations		Feb 8 Dry Run

Search...

Ekstraliga Foundation

Z Zofia

## Gifts

ADD NEW +

DOWNLOAD EXCEL (UTC)

Petra Moon-monthly

Include refunds / voids

Show gifts from

to

SUBMIT

Advanced Filter

Invert filter

External Transaction ID	Date	Type	External System	Donor	Amount	FMV	TDA
GSF_431404	Jul 26, 2023	Other	GS Fundraise	<a href="#">Petra Moon-monthly</a>	\$50.00		
GSF_367205	Jun 26, 2023	Other	GS Fundraise	<a href="#">Petra Moon-monthly</a>	\$50.00		
GSF_363963	May 26, 2023	Other	GS Fundraise	<a href="#">Petra Moon-monthly</a>	\$50.00		
GSF_TI_356299_416806	Apr 25, 2023	Other	GS Fundraise	<a href="#">Petra Moon-monthly</a>	\$50.00		
<b>Summary Totals</b>	<b>Count: 4</b>	<b>Gift Sum: \$200.00</b>	<b>Average: \$50.00</b>	<b>Median: \$50.00</b>			

## Company Matched Donation


# Gifts

[ADD NEW +](#)

[DOWNLOAD EXCEL \(UTC\)](#)

Include refunds / voids

Show gifts from  to  [SUBMIT](#)

Advanced Filter  

Invert filter

External Transaction ID	Date	Type	External System	Donor	Amount	FMV	TDA	Solicitation Method	
GSF_TI_351008_414565	Mar 25, 2023	Other	GS Fundraise	<a href="#">Pat Bernhard</a>	\$55.00			Website Donation Form - Fundraising	2
GSF_TI_351008_414564	Mar 25, 2023	Other	GS Fundraise	<a href="#">Pat Bernhard</a>	\$100.00			Website Donation Form - Fundraising	2
GSF_351009	Mar 25, 2023	Other	GS Fundraise	<a href="#">Pat Bernhard</a>	\$55.00			Website Donation Form - Fundraising	2
Count: 3		Gift Sum: \$210.00	Average: \$70.00	Median: \$55.00	<b>Matching Donation</b>				