CRM: Automated Data Sync Donor Profiles

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Donor profiles that are created in Donor CRM through the automated data sync process will match based on the GiveSmart Fundraise or Events Donor ID and will compare that to the email & phone number the donor uses when completing a new transaction.

Listed below are possible scenarios and how the automated data sync will recognize a donor as being the same donor or a new donor in GiveSmart Donor CRM.

Same Phone # | Phone Only

If I am a donor that makes a donation and I provide my phone only, then when a donation is made again in 3 months and I use the same phone it will match my account.

Same Email | Email Only

If I am a donor that makes a donation and I provide email only, then when a donation is made again in 3 months and I use the same email it will match my account.

Same Phone | Same Email

If I am a donor that makes a donation and I provide phone and email, then when a donation is made again in 3 months and I use the same phone and email it will match my account.

Same Phone | Different Email

If I am a donor that makes a donation and I provide phone and email, then when a donation is made again in 3 months and I use the same phone but different email it will match my account based on my phone and **append the new email to the existing donor account**.

Different Phone | Same Email

If I am a donor that makes a donation and I provide phone and email, then when a donation is made again in 3 months and I use a different phone but same email it will **create a NEW account**.

1st Participation in New GiveSmart Module

If it is the 1st time a donor is participating in Events after they participated in Fundraise (or vice versa) **a new donor profile will be created which will need to be merged**. Once merged the associated GiveSmart IDs would now be retained onto the one merged record, and all future transactions will roll to the merged account.

Name Change | Same Phone or Email

If a donor's name is changed in Events or Fundraise, but the same contact information (phone or email) is used, it will update the name on the existing profile. All Donor CRM admin will receive an email notification and a popup the next time they visit Donor CRM. The newly modified profile can be reviewed by going to Donors & Contacts > Merging Center and selecting the '**Check Name Changes from Automated Imports**' option. If the name needs to be changed, the modification should occur in the GiveSmart Events or Fundraise module.