What is a Donor Profile?

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When you click on a donor's name when viewing the results of a GiveSmart Fundraise Transaction Report, Pledge Report, or List, it will open up their **Donor Profile**. This profile compiles some information that has been captured throughout your GiveSmart account under a unique email address and/or phone number.

> Looking for CRM functionality? Contact your Customer Success Manager to learn more about GiveSmart's Donor CRM.

What is a Donor Profile?

The Donor Profile is a snapshot of a particular donor, which aggregates their giving history under one email or phone number within your GiveSmart Fundraise account.

It's important to note that the Donor Profile does not reflect any one transaction, as it may include data that was collected amongst various forms in your GiveSmart Fundraise account using the same email address or phone number.

> **TIP:** Run a transaction report under Existing Reporting > Search Transactions to export specific donor data submitted with a transaction.

The Donor Profile will also note their current subscription status (if the phone number was mobile verified), messages sent/received, and cumulative donations.

Can I edit information on a Donor Profile?

You'll notice there are some details/fields that can be edited on a Donor Profile. Edits made here would only reflect on the Donor Profile, and not impact data in your reporting or elsewhere in your account.

The Email Address and Phone Number cannot be edited.

> **NOTE:** The donor profile is not an exportable report.

> **NOTE:** Edits made to a donor's profile will not alter any data in your transaction reports, nor would adjustments to a donor's name update the name that appears on a public donor wall or thermometer.

In summary, the Donor Profile is intended as a quick snapshot of a donor's giving history and details. Though some data can be edited (aside from the email and phone number), this has no impact to any existing data in your reporting.

Where can I view donor transaction data?

The best way to retrieve any data submitted via a GiveSmart form is to build, run and export a **Transaction Report** from *Existing Reporting > Search Transactions*.

> In other words, do not rely on a Donor Profile to provide you with the information a donor submitted through a form.

Generally speaking, for data integrity purposes, we do not allow any data associated with a transaction or form submission to be edited/modified. This means that contact information provided through any GiveSmart Fundraise online form (such as the email or phone number) is locked and secure, so that your **Transaction Reporting** will always reflect the information that the donor had provided.

Why does a Donor Profile include information associated with a different donor?

The reason a donor's profile may include information associated with a different donor is if the same email address and/or phone number associated with another donor was used to submit a GiveSmart Fundraise form.

This will cause the two donor profiles to be merged together, as the system will assume they're the same person. Since it's a safe assumption that no two people share the same mobile phone number or email address, these are used as the unique identifiers to compile a donor's profile in GiveSmart Fundraise. When two or more donor profiles are merged together, this **cannot** be undone.

> **PLEASE NOTE:** If you're submitting a form on behalf of a donor and do not have their email address, it's not recommended to proceed until you obtain their email address. The email is a globally-required field on all GiveSmart payment forms and cannot be bypassed, to ensure donors will receive an automated receipt.
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> Entering in a "fake" email or an email not associated with that donor may cause a donor's

profile to be merged with another, which cannot be undone.

This may also prove problematic for the auto-sync with GiveSmart's Donor CRM, or a 3rd party CRM integration so it's imperative that accurate data is entered through your forms.