

CRM: Automated Data Sync

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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.

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
- TDA
- Payment_Method

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:

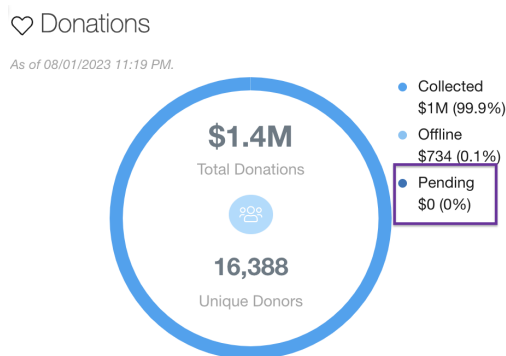
- Reports > Overview > **Payments Received** > Credit
- View the Batch column
 - If a batch number appears, this payment has been settled

- 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	Bld #	Phone Number	Notes	Batch
Aug 01, 2023 15:21 PM	Credit	VISA 1234	Julie Smith	\$190.00	Julie	Smith	123	+11231231234	Approval	#1234
Aug 01, 2023 15:22 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

☐ Collected
 ☒ Pending
 ☐ Refunded
 ☐ Voided

☐ Paypal

☐ Collected
 ☐ Refunded

☒ Matching Donations

☐ Collected
 ☒ Pending

☐ Offline ?

☐ Non Payment ?

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

Synced Data Examples

Multiple Item Types

CONTACT PROFILEHOUSEHOLDS (0)GIFTS (7)PLEDGES (0)ACTIVITIES (0)PAYMENT ACCOUNTS (0)

Gifts

+ ADD NEW

External System	Donor	Amount	FMV	TDA	Solicitation Method	Source ID	Sub Solicitation	General Ledger
GS Fundraise	Kirsten Kelley	\$44.00			2023 @ Holiday Weekend Giveaway "Fireworks 2023" - Fundraising	23336	donation	
GS Events	Kirsten Kelley	\$1.00		\$1.00	Cardinal Health, LLC_AUCTION_Cardinal Health GSE	150537	live	
GS Events	Kirsten Kelley	\$20.00			Cardinal Health, LLC_AUCTION_Cardinal Health GSE	150537	raffle	
GS Events	Kirsten Kelley	\$15.00		\$15.00	Cardinal Health, LLC_AUCTION_Cardinal Health GSE	150537	donationItem	
GS Events	Kirsten Kelley	\$25.00	\$15.00	\$10.00	Cardinal Health, LLC_AUCTION_Cardinal Health GSE	150537	instant	
GS Events	Kirsten Kelley	\$4.00		\$4.00	Cardinal Health, LLC_AUCTION_Cardinal Health GSE	150537	vote	
GS Events	Kirsten Kelley	\$195.00	\$105.00	\$90.00	Cardinal Health, LLC_AUCTION_Cardinal Health GSE	150537	tickets	
Average: \$43.43		Median: \$20.00						

Previous

1

Next

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	Victoria RecurringDonation	\$42.00		\$42.00	AUCTION_Donation Event	150560	cashDonations		
Jul 13, 2023	Other	GS Events	Victoria RecurringDonation	\$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

Pick Date

to

Pick Date

SUBMIT

Advanced Filter

Select filter

☐ Invert filter

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

Company Matched Donation

Gifts

ADD NEW +

DOWNLOAD EXCEL (UTC)

Pat Bernhard

☐ Include refunds / voids

Show gifts from

Pick Date

to

Pick Date

SUBMIT

Advanced Filter

Select 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	Pat Bernhard	\$55.00			Website Donation Form - Fundraising	2
GSF_TI_351008_414564	Mar 25, 2023	Other	GS Fundraise	Pat Bernhard	\$100.00			Website Donation Form - Fundraising	2
GSF_351009	Mar 25, 2023	Other	GS Fundraise	Pat Bernhard	\$55.00			Website Donation Form - Fundraising	2
Count: 3		Gift Sum: \$210.00	Average: \$70.00	Median: \$55.00	Matching Donation				