# Automated Data Sync

*Fiserv (formerly CardConnect)

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

Additional information can be found in the Automated Data Sync FAQs.

## Daily Sync

Each morning between 3:00 and 5:00 a.m. 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

NOTE: All synced data can be manually reviewed prior to upload or it can be automatically synced to Donor CRM.  To learn more about this setting and the review process, click here.

### 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 donor's contact information, including email, phone, or mailing address, will be appended to the existing donor profile in Donor CRM.

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



Tip: Do you 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 remain 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 must reach a status of 'Settled' with our card processing partner, Fiserv, before this transaction is synced to GiveSmart Donor CRM.  This process typically takes 24-48 hours, but please note that delays may occur when 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 from which it originated.

- **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.
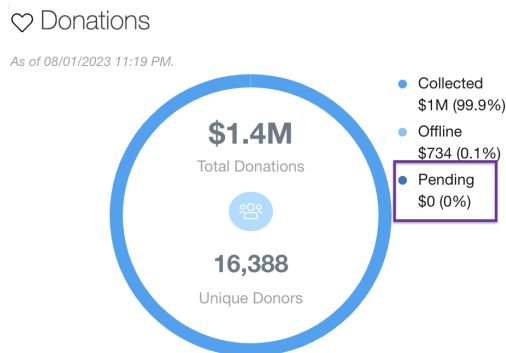
## GiveSmart Events

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 Fiserv.

| 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 Charlaman | $135.00 | Martin | Charlaman | 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.

♡ Donations

*As of 08/01/2023 11:19 PM.*

**$1.4M**
Total Donations

**16,388**
Unique Donors

- Collected
  $1M (99.9%)
- Offline
  $734 (0.1%)
- Pending
  $0 (0%)

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          ☐ Offline ❓          ☐ Non Payment
  ☐ Collected            ☐ Collected            Donations                                    ❓
  ☑ Pending              ☐ Refunded          ☐ Collected
  ☐ Refunded                                 ☑ Pending
  ☐ Voided

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

# Synced Data Examples

## Multiple Item Types

| | CONTACT PROFILE | HOUSEHOLDS (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 ⚙

<div align="right">

ADD NEW +    📄 DOWNLOAD EXCEL (UTC)

</div>

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 | S |
|---|---|---|---|---|---|---|---|---|---|
| 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 | | | | |

Pat Bernhard

☐ Include refunds / voids

Show gifts from    📅 Pick Date    to    📅 Pick Date

Select filter ▾

☐ Invert filter