

Automated Data Sync

Last Modified on 01/21/2026 12:37 pm EST

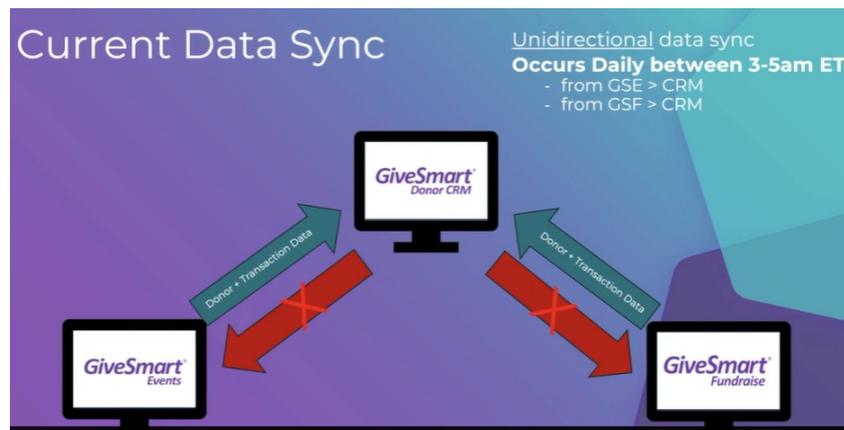
Automatically sync donor and transaction data from GiveSmart Events and Fundraise to GiveSmart Donor CRM. This one-way sync ensures accurate reporting, deeper insights into fundraising activity, and less manual administration.

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

Daily Sync Overview

GiveSmart runs the automatic sync each morning between 3:00 and 5:00 a.m. ET. During this time, any new or updated donor and transaction data from GiveSmart Events and GiveSmart Fundraise is transferred to GiveSmart Donor CRM.

Only activity that has occurred since the last sync is included.



Synced Data

All synced data can either:

- Be **reviewed manually before upload** (see [Data Import & Review here](#)), or
- **Sync automatically** to Donor CRM

You can control this data setting in the [Client Settings](#).

Donor Data

What syncs

New and updated donor records are transferred to Donor CRM after the donor completes a transaction.

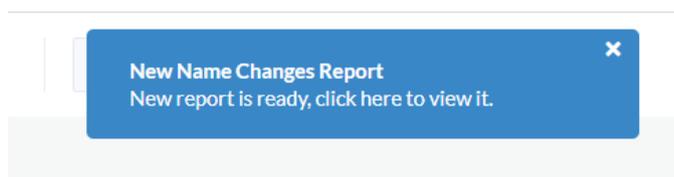
- **Name changes** automatically update the donor profile in Donor CRM
- **Contact information updates** (email, phone number, or mailing address) are appended to the donor's existing record



Name change notifications

When a donor's name changes through the automated sync:

- Admins receive an **email**
- A **pop-up** alert appears the next time they log in to Donor CRM:



Tip: If you have an Admin who should not receive name change notifications, change their access type to User. They will retain admin functionality except for client settings and name change alerts.

Viewing Name Change Records

To review name changes from automated syncs:

1. Go to **Donors & Contacts**
2. Select **Merging Center**
3. Choose **Check Name Changes from Automated Imports**
4. Select a report to view details

NOTE: Merging Donors Across Modules

If a donor participates in both **GiveSmart Events** and **GiveSmart Fundraise**, they may need to be **merged** in Donor CRM so they are recognized as the same individual.

This merge is typically required only the **first time** they appear in both modules. As long as their name and contact information remain consistent, additional merges are usually not needed.

Donor Fields That Sync

- **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

What syncs

- Newly **settled** transactions
- **Modified transactions**, as long as they are updated in the source system

All transaction changes must be made in **GiveSmart Events** or **GiveSmart Fundraise**, not in

Donor CRM.

Note: If a transaction is refunded from GiveSmart Events or Fundraise, *no changes will be synced to Donor CRM.*

Transaction Data	
Payment Types	Fields Transferred
<ul style="list-style-type: none">• Paid Revenue<ul style="list-style-type: none">• Cash, Check, Other, Credit Card (settled), Offline (Fundraise)• Matching Gifts<ul style="list-style-type: none">• After approved by Employer through Apply/Double the Donation• Refunds<ul style="list-style-type: none">• Will be removed from Donor CRM• Recurring Donations	<ul style="list-style-type: none">• Transaction ID• Donor ID• Gift Date• Gift Amount• Solicit + Sub Solicit Name• Campaign Name• Campaign ID (Fundraise)• Notes (Events)• Fair Market Value

Important notes

- **Refunded transactions** do not sync back to Donor CRM
- **Cash, Check, Other, and Offline donations** sync during the next daily sync
- **Credit Card transactions** sync only after reaching a status of **Settled** with GiveSmart's payment processor, Fiserv

Settlement typically takes **24 to 48 hours**, though delays may occur if a transaction is flagged for fraud review.

IMPORTANT: Transaction data synced from GiveSmart Events or Fundraise should **not** be modified from Donor CRM. Transaction modifications should be handled in the source module (GiveSmart Events or GiveSmart Fundraise).

Transaction Fields That Sync

- **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.

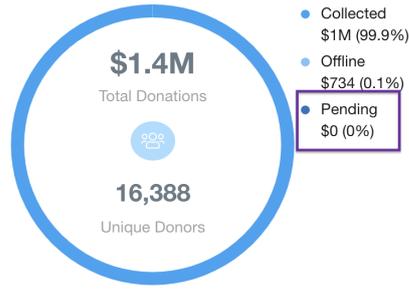
Time	Type	More Info	Card Name	Amount	First Name	Last Name	Bld #	Phone Number	Notes	Batch
Aug 01, 2023 1:51:21 PM	Credit	VISA 1234	Julie Smith	\$190.00	Julie	Smith	123	+11231231234	Approval	#1234
Aug 01, 2023 1:51:22 PM	Credit	VISA 4567	Martin Charlaman	\$135.00	Martin	Charlaman	444	+11231231222	Approval	#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.



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

<input checked="" type="checkbox"/> Credit Card	<input type="checkbox"/> Paypal	<input checked="" type="checkbox"/> Matching Donations	<input type="checkbox"/> Offline	<input type="checkbox"/> Non Payment
<input type="checkbox"/> Collected	<input type="checkbox"/> Collected	<input type="checkbox"/> Collected		
<input checked="" type="checkbox"/> Pending	<input type="checkbox"/> Refunded	<input type="checkbox"/> Pending		
<input type="checkbox"/> Refunded				
<input type="checkbox"/> Voiced				

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

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