Donor CRM Automated Data Sync FAQs

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Below are some commonly asked questions about Donor CRM's automated sync functionality. If you are not currently in the automatic flow, click **here** to take advantage of this feature.

If I need to modify a Contact, where should I make this change?

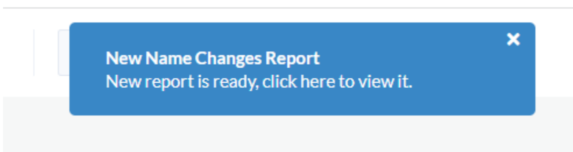
- Contact information should always be updated in the source module where it was originally captured (GiveSmart Events or GiveSmart Fundraise). If a Contact originated from Events or Fundraise, it should not be edited directly in Donor CRM.
- Once you update the Contact's details in Events or Fundraise, those changes will automatically flow into Donor CRM during the next scheduled sync.

If I need to modify a donor's name, where should I make this change?

- A donor's name should be updated in the module it originally came from (GiveSmart Events or GiveSmart Fundraise). If the name is changed only in Donor CRM, it will be overwritten and revert back to the original Events or Fundraise name during the next sync.
- Updating the name at the source ensures the change is retained and correctly reflected in Donor CRM.

Will I be able to review name changes that occurred from the automated data sync?

- Yes, to review name changes navigate to Data Import & Review > **Check Name Changes from Automated Imports**
- When a donor record name is changed due to an automated data sync, the admin on Donor CRM will receive an **email** and a popup will appear the next time Donor CRM is opened.



The Automated Data Sync was enabled, but data from Events and Fundraise has not synced yet. What are my next steps?

- Check **Data Import & Review** to confirm there is no pending data to import.
- If it's been more than **4 days post-transaction date** and expected transaction/contact data has not synced, please reach out to Support by clicking the Contact Us above.
  - Be sure to provide your organization name, Event Site ID or Fundraise Keyword Activity details, a brief overview of the data that is missing including the donor names and dates of transactions, and any additional details.

Does GiveSmart Donor CRM provide a live view of transaction and donor data?

- No, the transaction and donor data is synced daily between the hours of 3-5 am ET. You will be able to review all synced data prior to the Contacts and Transactions appearing in Donor CRM.

What data will transfer from GiveSmart Events and Fundraise to GiveSmart Donor CRM?

- Donor (contact) and transaction (gift) data will flow from GiveSmart Events and Fundraise to GiveSmart Donor CRM. Currently, custom fields do not sync over. More information on which System fields sync can be found here

Why do transactions sync with No Thank You Method?

- Email receipts from the source module are considered the gift thank you.

Can the data sync from GiveSmart Donor CRM into GiveSmart Events and Fundraise?

- Not at this time. The donor and transaction data can only flow unidirectionally going from GiveSmart Events and Fundraise to Donor CRM.

My transactions from GiveSmart Events are visible in GiveSmart Fundraise reports. Does this mean my Events transactions will sync twice to Donor CRM?

- No, the transaction data from GiveSmart Events may be visible in GiveSmart Fundraise (if it was created through the **Event Activity** pathway), but the data will be transferred to GiveSmart Donor CRM directly from GiveSmart Events.

Are transaction refunds synced to Donor CRM?

- No. Refunds are only reflected in GiveSmart Events or GiveSmart Fundraise. If a transaction is refunded in either module, that change is not synced to Donor CRM, and **no updates will be made** to the corresponding record there.

Are recurring donations reflected in GiveSmart Donor CRM?

- Yes. Recurring donations from both GiveSmart Events and Fundraise are automatically synced to Donor CRM.

Are matching donations reflected in GiveSmart Donor CRM?

- Yes. If you have either an Amply or Double the Donation subscription linked to GiveSmart Fundraise, the matching donations will be synced to Donor CRM upon employer approval of the match.