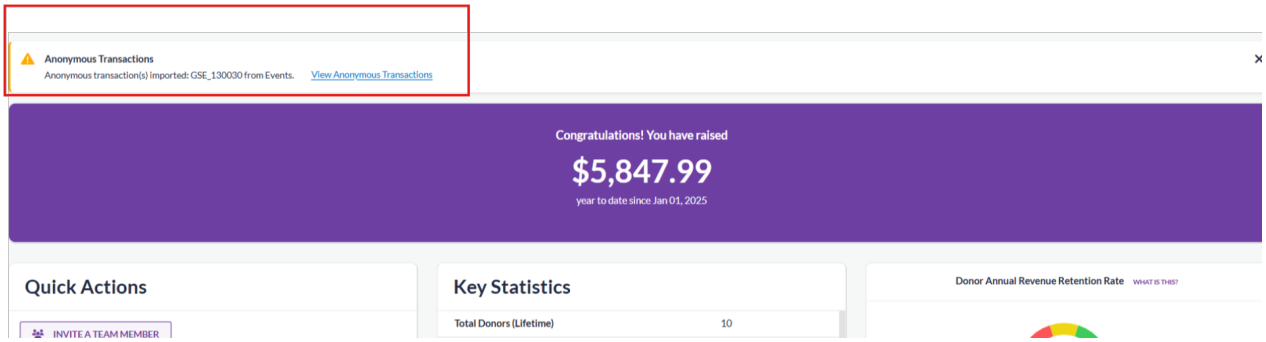
Anonymous and Failed Transaction Notification

Last Modified on 09/03/2025 1:50 pm EDT

When anonymous transactions are imported into Donor CRM, admin users will now see a banner at the top of the Dashboard after logging in. This helps admins quickly identify and act on anonymous records.

> Only **admin users** will see the banner.

The banner appears after login, if one or more anonymous transactions were imported from Fundraise/ Events.



The banner stays visible until dismissed by clicking the 'X' on the top right.

More information is as follows:

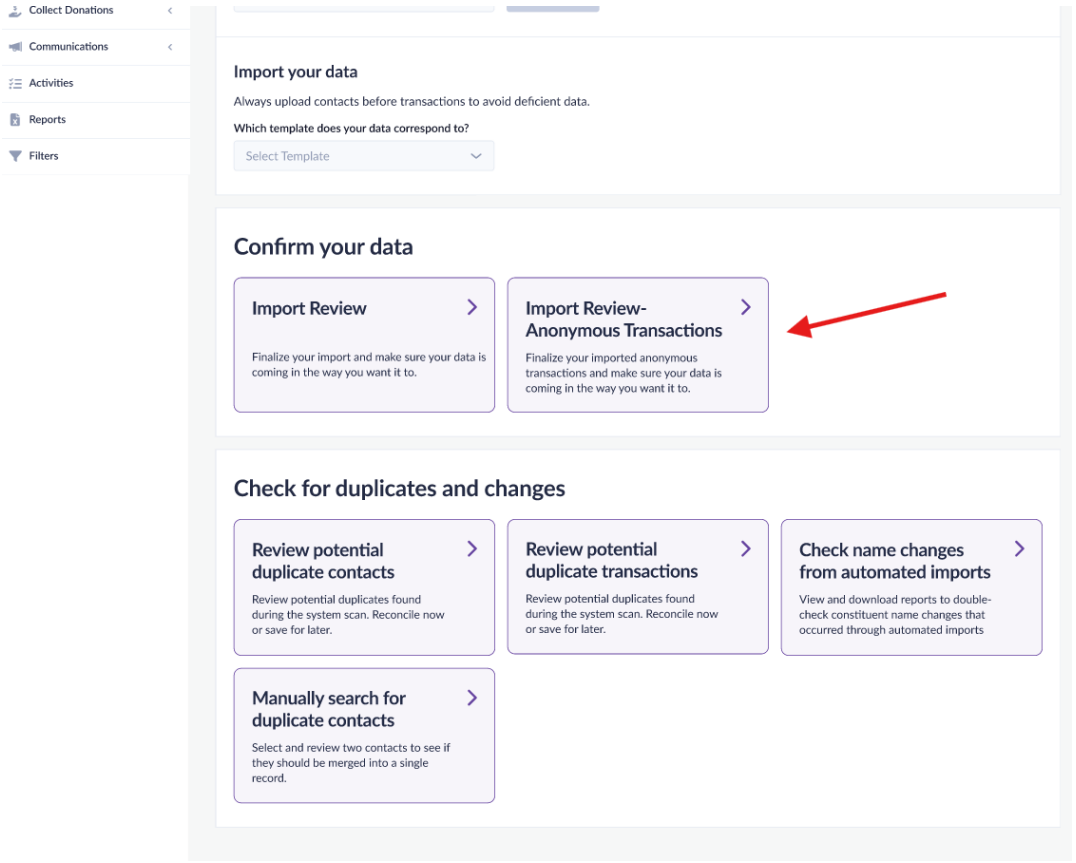
- Transactions are grouped by source in the message.
- If multiple records exist, they're all shown in one banner.
- The banner does **not** block the main Dashboard content.

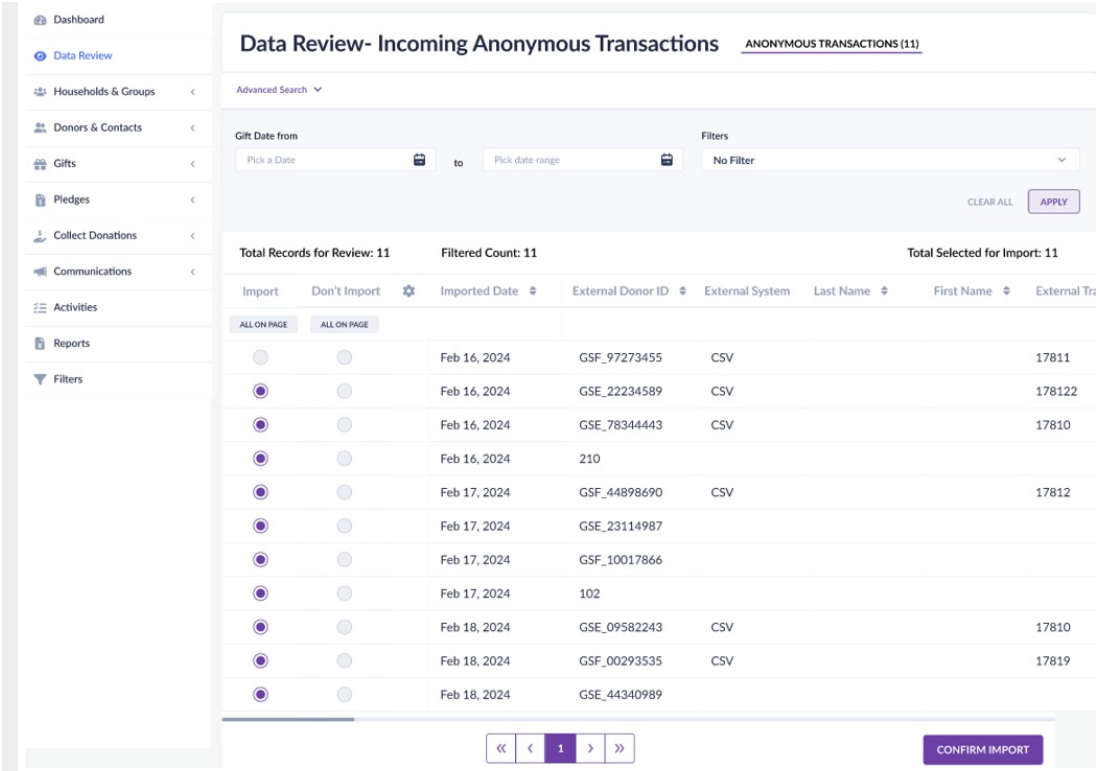
Under some special circumstances:

- If no anonymous transactions are imported, no banner is shown.
- Non-admin users won't see this banner.
- If both anonymous transactions and failed imports occur, **both banners** will be displayed.

Please note: this banner appears even if **Import Without Review** is enabled for your organization. The message will always use the format: **Anonymous transaction(s) imported**, not **Anonymous transactions imported**.

Import Review - Anonymous Transactions





Clicking the tile opens the **Data Review – Incoming Anonymous Transactions** screen.

This screen allows admins to review and finalize anonymous transactions before importing them into the system. All records are selected to **Import** by default using radio buttons.

Actions

- **Import:** Moves the selected record into the database.
- **Don't Import:** Skips importing that specific record.

The user will see the following statistics:

- **Total Records for Review:** Number of all records in the review list.
- **Filtered Count:** Based on any active filters or search applied.
- **Total Selected for Import:** Number of records selected for import.

Pagination will be 50 records per page.

Bulk actions include:

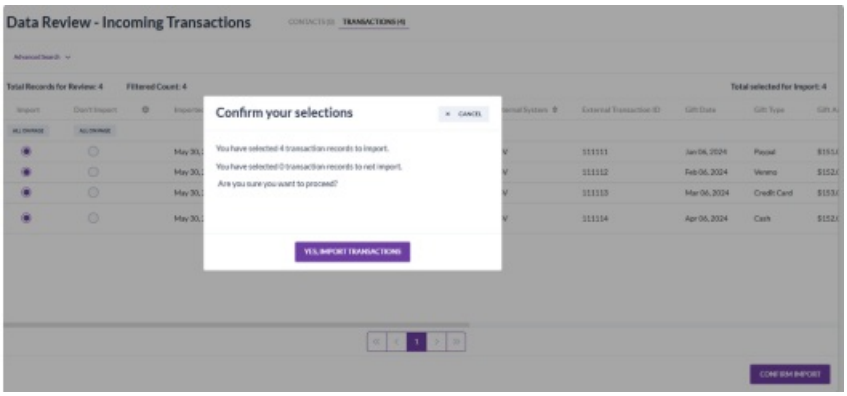
- **Import – ALL ON PAGE:** Selects "Import" for all records on the page.
- **Don't Import – ALL ON PAGE:** Selects "Don't Import" for all records on the page. A **gear icon** allows users to rearrange or hide columns as needed.

Advanced Search & Filters

- **Date Range**: Filter by From/To dates.

- **Filter Options**: Default = No filter
    - Options: Automated Data Sync, CSV File, GS Events, GS Fundraise, GS Events and GS Fundraise, $0 Transactions
- **Actions**:
    - **CLEAR ALL**: Resets all filters
    - **APPLY**: Shows filtered results

When clicking **Confirm Import**, users will see this pop-up:



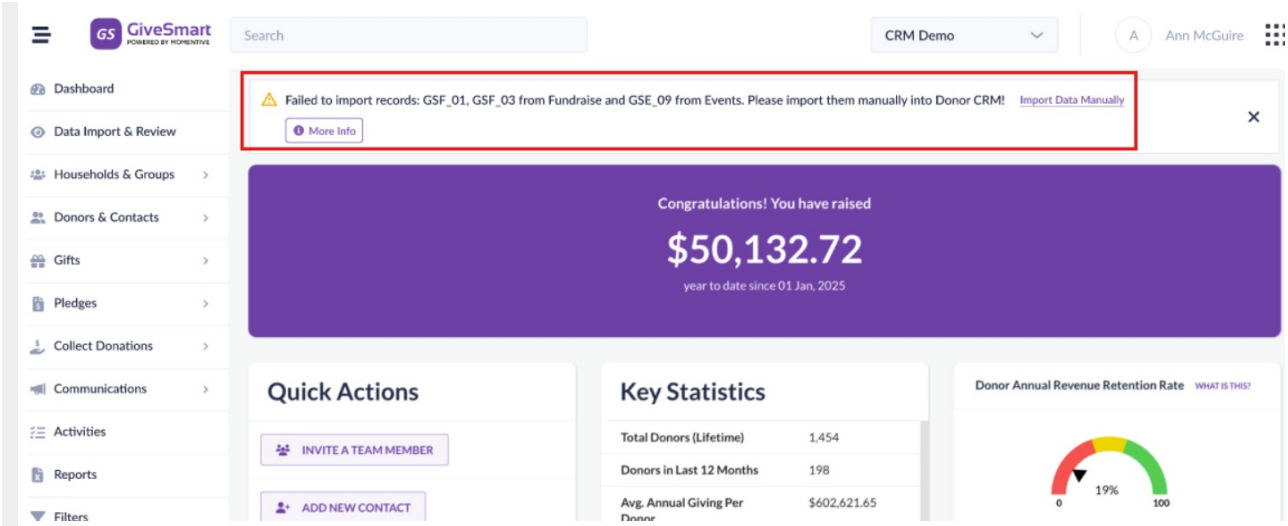
Note: Even if the UI uses the word “transaction,” ensure the message says **anonymous transaction records**.

- **YES, IMPORT CONTACTS** button finalizes import and moves selected data into the database.
- **CANCEL** button closes the dialog with no changes.

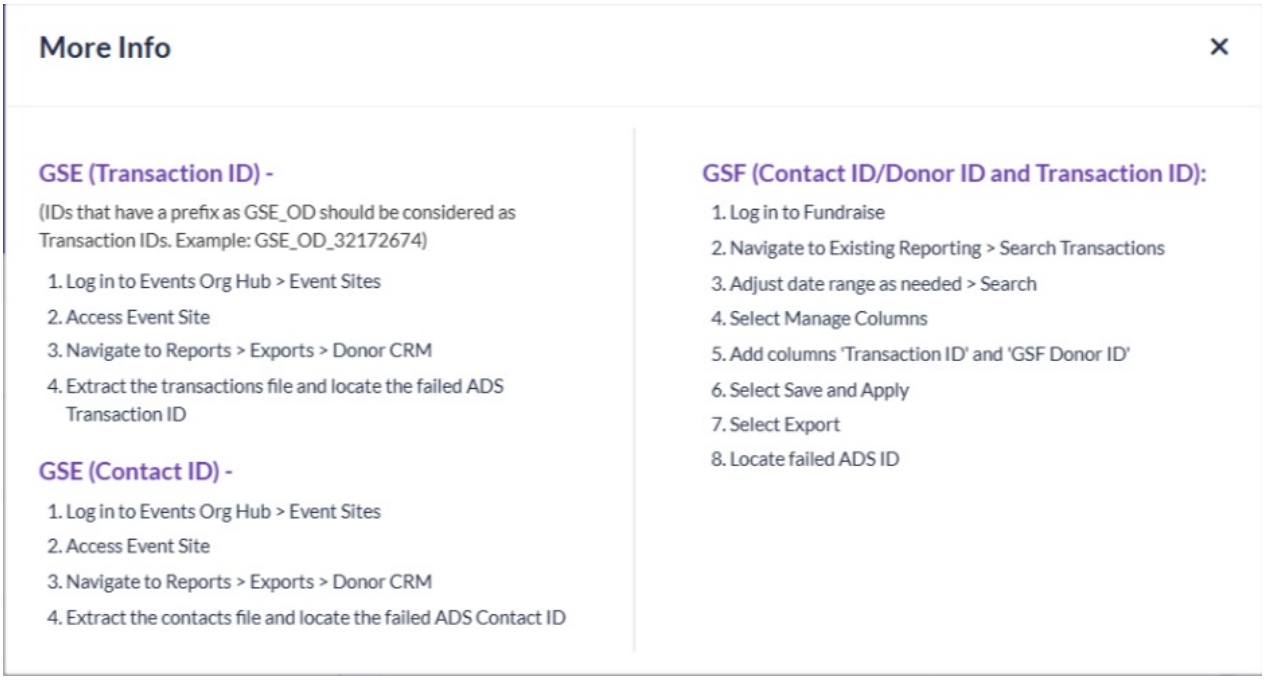
After Import the success/failure toast messages will appear exactly as they do in the current Import Review screens.

Failed ADS imports

If any records fail to import automatically from Fundraise or Events into Donor CRM. User can also click on the **More info** tooltip to see advanced options



The following options will display once the More info tooltip is clicked



Message Example:
Failed to import record(s): GSF_01, GSF_03 from Fundraise and GSE_09 from Events. Please import them manually into Donor CRM.
Clicking the link takes the user to the *Data Import & Review* screen. The banner appears once per session unless more failures occur and stays until manually dismissed.

If there are no failed imports or the user is not an admin, the banner will not display. It also appears regardless of the “Import without review” setting.

Note: Ensure the message uses **“Failed to import record(s)”** to maintain clarity.