

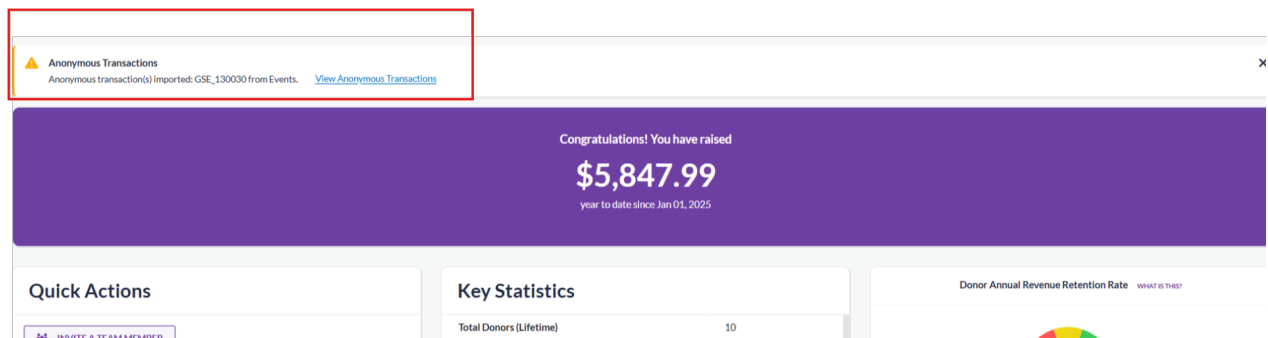
Anonymous and Failed Transaction Notification

Last Modified on 08/20/2025 12:51 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.

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

Collect Donations <

Communications <

Activities

Reports

Filters

Import your data

Always upload contacts before transactions to avoid deficient data.

Which template does your data correspond to?

Select Template ▾

Confirm your data

Import Review >

Import Review-Anonymous Transactions >

Finalize your import and make sure your data is coming in the way you want it to.

Finalize your imported anonymous transactions and make sure your data is coming in the way you want it to.

Check for duplicates and changes

Review potential duplicate contacts >

Review potential duplicate transactions >

Check name changes from automated imports >

Review potential duplicates found during the system scan. Reconcile now or save for later.

Review potential duplicates found during the system scan. Reconcile now or save for later.

View and download reports to double-check constituent name changes that occurred through automated imports

Manually search for duplicate contacts >

Select and review two contacts to see if they should be merged into a single record.

Dashboard

Data Review

Households & Groups

Donors & Contacts

Gifts

Pledges

Collect Donations

Communications

Activities

Reports

Filters

Data Review- Incoming Anonymous Transactions

ANONYMOUS TRANSACTIONS (11)

Advanced Search

Gift Date from

Pick a Date

to

Pick date range

Filters

No Filter

CLEAR ALL

APPLY

Total Records for Review: 11

Filtered Count: 11

Total Selected for Import: 11

| Import | Don't Import | Imported Date | External Donor ID | External System | Last Name | First Name | External Tr |
|----------------------------------|-----------------------|---------------|-------------------|-----------------|-----------|------------|-------------|
| ALL ON PAGE | ALL ON PAGE | | | | | | |
| <input checked="" type="radio"/> | <input type="radio"/> | Feb 16, 2024 | GSF_97273455 | CSV | | | 17811 |
| <input checked="" type="radio"/> | <input type="radio"/> | Feb 16, 2024 | GSE_22234589 | CSV | | | 178122 |
| <input checked="" type="radio"/> | <input type="radio"/> | Feb 16, 2024 | GSE_78344443 | CSV | | | 17810 |
| <input checked="" type="radio"/> | <input type="radio"/> | Feb 16, 2024 | 210 | | | | |
| <input checked="" type="radio"/> | <input type="radio"/> | Feb 17, 2024 | GSF_44898690 | CSV | | | 17812 |
| <input checked="" type="radio"/> | <input type="radio"/> | Feb 17, 2024 | GSE_23114987 | | | | |
| <input checked="" type="radio"/> | <input type="radio"/> | Feb 17, 2024 | GSF_10017866 | | | | |
| <input checked="" type="radio"/> | <input type="radio"/> | Feb 17, 2024 | 102 | | | | |
| <input checked="" type="radio"/> | <input type="radio"/> | Feb 18, 2024 | GSE_09582243 | CSV | | | 17810 |
| <input checked="" type="radio"/> | <input type="radio"/> | Feb 18, 2024 | GSF_00293535 | CSV | | | 17819 |
| <input checked="" type="radio"/> | <input type="radio"/> | Feb 18, 2024 | GSE_44340989 | | | | |

<<

<

1

>

>>

CONFIRM IMPORT

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:

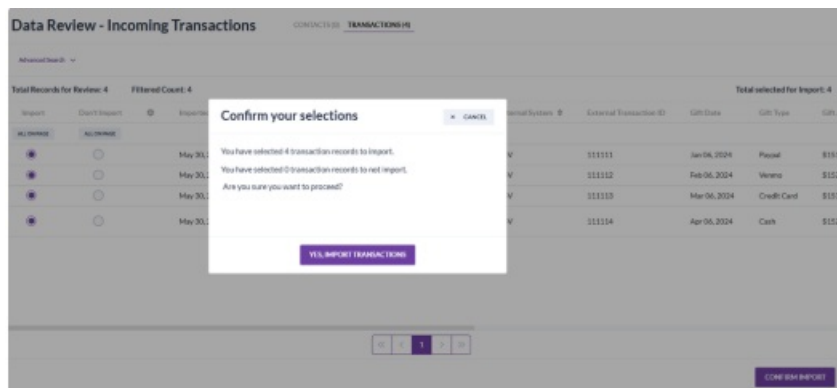
- **Import – ALL ON PAGE:** Selects "Import" for all records on the page.
- **Don't Import – ALL ON PAGE:** Selects "Don't Import" for all records on the page. A **gear icon** allows users to rearrange or hide columns as needed.

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



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.

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

