CRM: Automated Data Sync FAQs

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If I need to modify a transaction, where should I make this modification?

- Transactions should be modified from their source point. A transaction should not be modified in GiveSmart Donor CRM if it originated in either GiveSmart Events or Fundraise. Once you modify a transaction in GiveSmart Events or Fundraise the modification will be reflected in Donor CRM during the next automated sync.

How can I change a donor name that was updated by the automated data sync?

- If a donor's name needs to be changed, the name will need to be modified in the platform it originated from. If the name is changed only in Donor CRM, then it will continually revert to the name listed on GiveSmart Events or Fundraise during the subsequent sync.

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.

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

- Donor and transaction data will flow from GiveSmart Events and Fundraise to GiveSmart Donor CRM. To see a full list of donor and transaction fields that sync, view here for **Events** and here for **Fundraise**.

Can the data transfer from GiveSmart Donor CRM to GiveSmart Events and Fundraise?

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

My organization has GiveSmart Donor CRM, but our Events & Fundraise data does not automatically sync. How can we get our data to automatically sync?

- If you know that your data should be automatically syncing, please reach out to our **Support Team** if the transaction data has not transferred **4 days post-transaction date**.
- If you are not currently in the automatic flow, click **here** to take advantage of this feature.

What information should I provide to Support if I have an issue with my synced data?

As much information as you can provide will assist our team in understanding and identifying the issue. Even if limited details are known, there is general information that should be shared:

- Organization name, Event ID or Activity Name data is missing, date of transaction/modification, any additional details.

Will my transaction data from GiveSmart Events sync to GiveSmart Donor CRM twice since it's visible in GiveSmart Fundraise?

- 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 refunds visible in Donor CRM?

- Currently a record of the refund will only be reflected in GiveSmart Events or Fundraise. If a transaction is refunded on GiveSmart Events or Fundraise, the transaction will be deleted from GiveSmart Donor CRM during the next automated sync.

Are recurring donations reflected in GiveSmart Donor CRM?

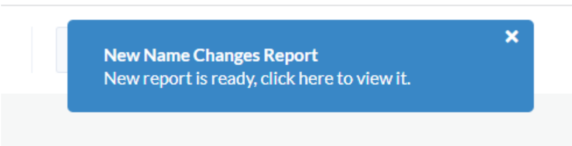
- Yes. Recurring donations from both GiveSmart Events and Fundraise are automatically synced to Donor CRM.

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 GiveSmart Donor CRM upon employer approval of the match.

Where can I review any name changes that occurred from the automated data sync?

- 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.



- A report can be viewed by going to Donors & Contacts > Merging Center > Check Name

Changes from Automated Reports.

What should I do if I see an anomaly in the data that has been transferred to Donor CRM from Events or Fundraise?

- If you notice any anomalies, please do not delete the transaction or donor profile. Submit via email to our Support team at givesmart-support@communitybrands.com.