

JustGiving-BBCRM Connector

User Guide

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ABOUT THIS DOCUMENT

The JustGiving-BBCRM connector is a one-way transfer of information from JustGiving (JG) to Blackbaud CRM (BBCRM) using the JustGiving APIs. This user guide is intended to provide an overview of the included functionality so that BBCRM users understand the solution and the associated configuration options.

Terminology

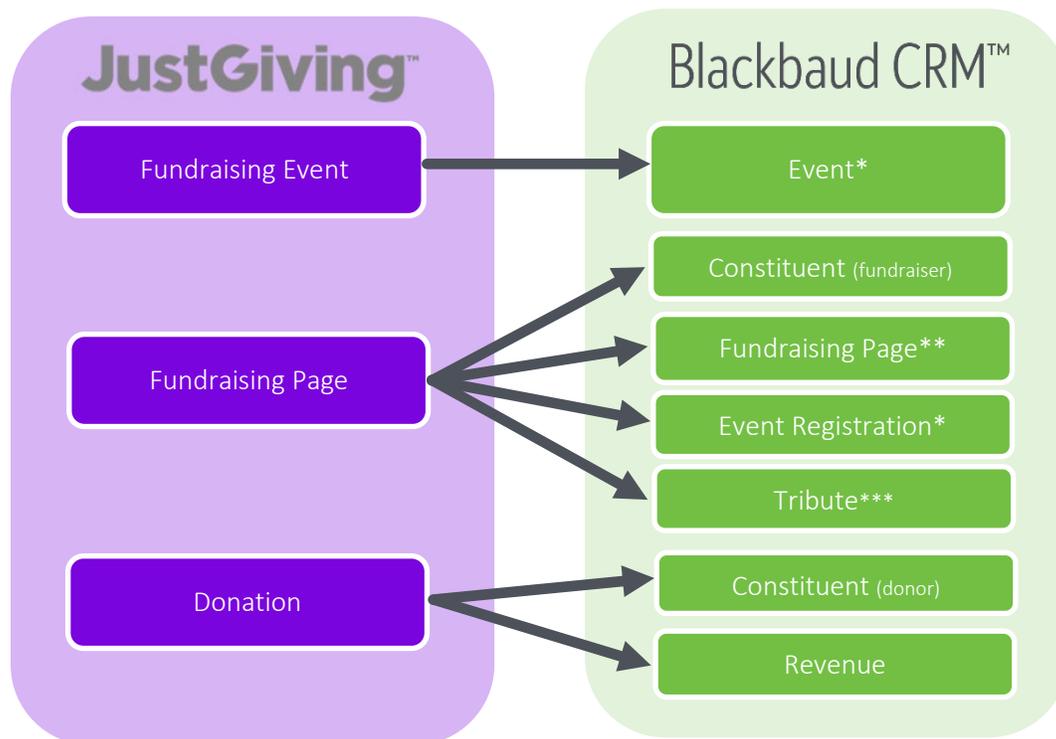
Term	Description
Blackbaud CRM (BBCRM)	A constituent relationship management database system developed by Blackbaud. In this document, Blackbaud CRM will also be referred to as BBCRM .
JustGiving (JG)	A global online social platform for giving. In this document JustGiving will also be referred to as JG .
JG-BBCRM Connector	A Blackbaud CRM and JustGiving one-way data flow using JG APIs to transfer information to BBCRM. In this document, the JustGiving-Blackbaud CRM Integration will also be referred to as the JG-BBCRM Connector .
Fundraiser	<p>A supporter of the organization who has created a fundraising page in JustGiving to raise money on behalf of the charity.</p> <p>Note: ‘Fundraiser’ is also a constituency in Blackbaud CRM used by the prospect management functionality to refer to professional fundraisers employed by the organization. This constituency will <u>not</u> be automatically applied to JustGiving fundraisers, who are considered volunteer community fundraisers. Any reference to ‘Fundraiser’ in this document or the JustGiving Connector functionality refers to a JustGiving fundraiser.</p>
Gift Aid	Gift Aid is a UK government scheme that enables charitable organisations to claim tax relief on donations from UK taxpayers, increasing the value of donations by 25%. All references to Gift Aid are only relevant for UK-based clients.

SOLUTION OVERVIEW

The JustGiving-Blackbaud CRM Connector will be comprised of a series of custom business processes to bring data from JustGiving into BBCRM. Some data will be directly written to the database, while other data will be brought into a BBCRM batch for optional review. A combination of existing fields and new custom fields on constituent, revenue, and event records will be used to capture information from JustGiving. A new custom record type will also be created in BBCRM to store detail on JustGiving fundraising pages. Multiple API connections can be configured in BBCRM to allow data from multiple JustGiving charity accounts to be brought into one BBCRM environment.

Mapping

The following diagram outlines the JustGiving data elements that will be transferred as part of this solution and the record types that will be created and/or updated in Blackbaud CRM as a result:



* only for certain JustGiving events (based on configuration)

**custom record type

*** only for certain JustGiving fundraising pages (based on 'memorial' page type)

Included Blackbaud CRM Custom Elements

Type	Name	Description	Location
Functional Area	JustGiving Connector Functional Area	Manage JG-BBCRM Connector configurations and processes. Configure API connections, code table translations, download processes, and other integration settings.	"JustGiving Connector" is a custom functional area
Business Process	Fundraising Page Download Process	Custom business process downloads fundraising page data from JG via API including fundraiser, page details, tribute, and event information related to the page. This process will write data directly to the BBCRM database.	JustGiving > Download fundraising pages
Business Process	Fundraising Revenue Download Process	Custom business process downloads revenue records from JG via API into a BBCRM staging table, preparing them for import into batch.	JustGiving > Download revenue
Business Process	Fundraising Revenue Query Import Process	Custom business process imports revenue records from the JG staging table in BBCRM into batch.	JustGiving > Query import
Batch Type	JustGiving Revenue Batch	Custom batch template for mapping JustGiving donations into BBCRM revenue records.	Batch type = JustGiving Revenue
Record Type	Fundraising Page custom record type	This custom record type captures information about the JG fundraising page.	Record type = Fundraising Page
Search List	Fundraising Page search	Custom task that displays the custom fundraising page search list.	JustGiving > Fundraising page search
New Page	Fundraising Page record	Custom page to display all details of a specific fundraising page and associated revenue records.	Page = Fundraising Page Detail Page
New Tab	Event Page tab	A custom JustGiving tab is surfaced on the Event page in BBCRM to display information on associated JustGiving pages.	Event page
New Tab	Constituent Page tab	A custom JustGiving tab is surfaced on the Constituent page in BBCRM to display information on associated JustGiving pages.	Constituent page
New Tab	Tribute Page tab	A custom JustGiving tab is surfaced on the Tribute page in BBCRM to display information on associated JustGiving pages.	Tribute page
New Tab	Registrant Page tab	A custom JustGiving tab is surfaced on the Registrant page in BBCRM to display	Registrant page

		information on associated JustGiving pages.	
New Tab	Revenue Page tab	A custom JustGiving tab is surfaced on the Revenue page in BBCRM to display information on associated JustGiving pages and Gift Aid (UK-only).	Revenue Transaction page
Query View	JustGiving Staged Revenue Query	Custom source view to query from staged JustGiving revenue information to support Query import.	Ad-hoc query source view = JustGiving Staged Revenue
Query View	Fundraising Page Query	Custom source view to query fundraising pages, linked to the existing constituent, event, and tribute query nodes.	Ad-hoc query source view = Fundraising Page
Merge Task	Fundraising Page Merge task	Transfers fundraising pages associated with the source constituent to the target constituents upon constituent merge.	Constituent Merge
Global Change	Delete Staging Table global change	Purges the staging table based on parameters.	Global Change type = Delete JustGiving staged revenue

JUSTGIVING CONNECTOR FUNCTIONAL AREA

The JustGiving functional area is where users can configure the business rules for the data flow from JustGiving into BBCRM and access JustGiving-specific business processes in BBCRM.

JustGiving Connector

- JustGiving pages**
 - Fundraising page search
 - Fundraising pages
- JustGiving revenue**
 - Uncommitted revenue batches
- Connector processing**
 - Download fundraising pages
 - Download revenue
 - Import revenue
- Configuration**
 - JustGiving API connections
 - JustGiving translations
 - JustGiving connector settings

Fundraising Page Search (Task)

Use this task to search for a specific fundraising page. BBCRM users may add additional filter fields to this search list using the “Search list configuration” task under Administration.

Fundraising Page Search

Online page ID: URL:

Title: Fundraiser:

Create date: BBCRM event:

Online event name: Online event type:

Fundraising Pages (Task)

The ‘Fundraising Pages’ task surfaces a page with a list builder displaying all fundraising page records, with the ability to select columns and apply filters.

Fundraising Pages

Fundraising Pages (208)

Title	Campaign name	Create date	Number of ...	Offline amou...	Target amount	URL
Alfredo Vindas						
Alfredo's test	Test 2020	3/9/2020	0	\$0.00	\$0.00	https://www.ju...
Alfredo's Test2...	Test 2020	3/9/2020	0	\$0.00	\$0.00	https://www.ju...
Alonso Solis						

Uncommitted Revenue Batches (Task)

The 'Uncommitted Revenue' batches task surfaces a page displaying all uncommitted JustGiving revenue batches.

Connector Processing

Tasks are available to download and import fundraising pages and revenue and manage any process exceptions.

Configuration

Tasks are available to further configure the JG-BBCRM Connector.

JUSTGIVING FUNDRAISING PAGES

Fundraising pages are the main source of record for all data from JustGiving. Fundraising pages are be downloaded using a custom business process.

Jackie Zimmerman, Fundraiser

Fundraising Page: Fundraiser for Greenhill School

Title: Fundraiser for Greenhill School
 URL: www.justgiving.com/fundraising/Jackie-Zimmerman-GreenhillGivingDay

Lookup ID:	pg-10000017	Number of online donations:	3	Custom campaign code 1:
Online page ID:	12712418	Total donations:	\$150.00	Custom campaign code 2:
Create date:	2/11/2020	Offline amount:	\$0.00	Custom campaign code 3:
Expiration date:	2/11/2025	Target amount:	\$385.85	Custom code 1:
Status:	Active			Custom code 2:
Source:	JustGiving			Custom code 3:
Fundraiser:	Jackie Zimmerman, Fundraiser	Number of donations in BBCRM:	0	Custom code 4:
Tribute:		Total donations in BBCRM:	\$0.00	Custom code 5:
BBCRM event:				Custom code 6:
Online event name:	Greenhill Giving Day			
Online event type:	Other personal challenge			
Online event date:	2/11/2020			
Campaign name:	Class Reunion Example			
Team name:	Class of 2004			

Download Fundraising Pages

All JustGiving fundraising page download processes can be viewed by navigating to JustGiving Connector > Download fundraising pages. One download process should be configured per JustGiving charity account.

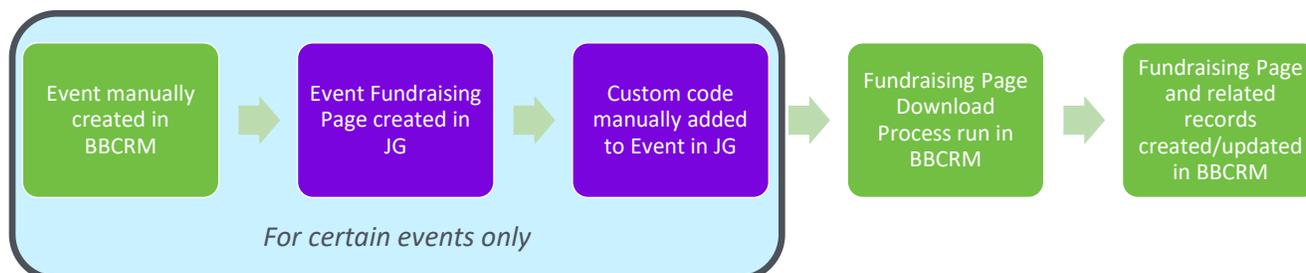
JustGiving Fundraising Pages Download Processes

JustGiving fundraising page download processes (3) + Add 📄 More ▾

Name	Connection name	Start date option	Start date	End date option	End date	Download pages based on
SB	SB	Specific date	1/1/2021	Specific date	3/1/2021	Page modified date
Start process Edit Delete						
BB Demo Charity	BB	Yesterday		Today		Page modified date
BHF	BHF	Specific date	1/1/2021	Specific date	1/31/2021	Page modified date

This custom business process creates and updates fundraising page records in BBCRM. When the process runs, constituent records are added and updated with the fundraiser information. This process will also create event registrations and tributes, depending on if that information is included with the fundraising page. All this data is directly written to the BBCRM database by the business process.

JustGiving events can be matched to BBCRM events using a custom code from JustGiving. When new JustGiving events are set up that should be linked to a BBCRM event, a user will need to (1) create the corresponding event in BBCRM if it does not yet exist and (2) populate the BBCRM Lookup ID in the custom code field in JustGiving. This integration will not create event records in BBCRM. The integration allows for a one-to-many relationship, so the same BBCRM event Lookup ID may be populated for multiple JustGiving events.



Note — The JustGiving API does not feed data directly from the live website, but from a data warehouse. This data warehouse is generally refreshed on a nightly basis, which means there will be a slight delay between when the page is added or updated in JustGiving and when it appears in BBCRM.

JUSTGIVING FUNDRAISING PAGES DOWNLOAD PROCESS PARAMATERS

Multiple download processes may be configured. At least one process should be configured for each JustGiving API connection.

The table below explains items on the Add and Edit forms for the download process.

Screen Item	Description
Name	The name of the individual download process.
Connection name	Select the API connection option to determine which JustGiving site to download pages from.
Start date	Select whether to use a Specific date, Yesterday or Today. Note: If Specific date is selected here, it must also be selected for the End date.
Start date	If Specific date was selected for the Start date option, this field becomes available. Enter the date value directly into the field or click the calendar icon to select the date from a calendar view.
End date	Select whether to use a Specific date, Yesterday or Today. Note: if Specific date is selected here, it must also be selected for the Start date.
End date	If Specific date was selected for the End date option, this field becomes available. Enter the date value directly into the field or click the calendar icon to select the date from a calendar view.
Download pages based on	Select 'Page modified date' to download pages based on when the page was last updated. Select 'Page created date' to download pages based on when the page was created.

Note — The download process limits to a three month range from which fundraising pages can be download. If the start and end date options selected exceed a three-month window, an error will occur when running the process.

JUSTGIVING FUNDRAISING PAGE DOWNLOAD EXCEPTIONS

Users should periodically review and resolve exceptions generated by the business process. Exceptions are surfaced on the 'Exceptions' tab of the JustGiving Fundraising Pages Download Process page. This tab contains two data lists: the first displays all exceptions for new pages, the second displays all exceptions for page updates. These lists consolidate all exceptions from previous business process history runs, de-duplicated based on Page ID so that if the same page has excepted multiple times, it will only appear once. Resolved exceptions are automatically removed from the list.

Refer to [JustGiving Fundraising Page Download Exceptions](#) for common error messages

JustGiving fundraising page download processes
BB Demo Charity

Step 1: Download Pages | Step 2: Review Exceptions

Expand all | Collapse all

⌵ Exception details for new pages (237) | Filters | More ▾

<input type="checkbox"/>	Online page ID	Fundraiser name	Error message	Status
<input checked="" type="checkbox"/>	12088465	Luis Pereira	The configured custom code for t...	Not processed
<input checked="" type="checkbox"/>	12088468	Luis Pereira	The configured custom code for t...	Not processed

EXCEPTION TASKS

Several tasks are available in the Exception detail lists to assist with resolving the exceptions.

- **Update details** – Allows direct editing of the incoming fundraising page details including a link to the BBCRM fundraiser record, fundraiser contact info, JustGiving user ID, and tribute information.
- **Reprocess record** – Allows the exception to be reprocessed once the underlying exception has been resolved without re-running the entire download process.
- **Ignore exception** – Removes the exception from the current list of exceptions. If the download process is run again and the underlying exception issue has not been resolved, the exception will download again.

Fundraising Page Tasks

Additional tasks are available on the Fundraising Page.

SET CUSTOM CODES

Custom codes can be added directly from the Fundraising Page to sync back to the Fundraising Page in JustGiving. To set custom codes for the page, open the Fundraising Page and click Set custom codes in the left task bar (under More information). Users can enter any necessary codes here and upon clicking Save, the data will be sent to JustGiving.

This is the only area of the integration that sends data from BCRM to JustGiving.

More information

-  Fundraising page search
-  View all fundraising pages
-  **Set custom codes**
-  Edit fundraiser



Title:

URL:

Look

EDIT FUNDRAISER

The fundraiser constituent associated with a Fundraising Page can be edited directly from the page. To edit the fundraiser, open the Fundraising Page and click Edit Fundraiser in the left task bar (under More information).

Note — This task should not be used for resolving duplicate fundraisers. To resolve duplicate fundraisers, the constituent records should be merged using a Merge process with a configuration that includes JustGiving data (as per next section).

Constituent Merge Task

A custom task is available for merging Fundraising Pages. It is recommended to review and update existing merge configurations to determine if this task needs to be included, or to create new configurations specific to JustGiving fundraisers.

To access merge configurations, go to the Constituents functional area > Duplicates > Constituent merge > Merge configurations tab. No additional parameters exist for the merge task.

Merge tasks

- Financial accounts
- Foundations
- Friends Asking Friends fundraising
- Fundraising page**
- Fundraising purposes
- Interactions
- Interests

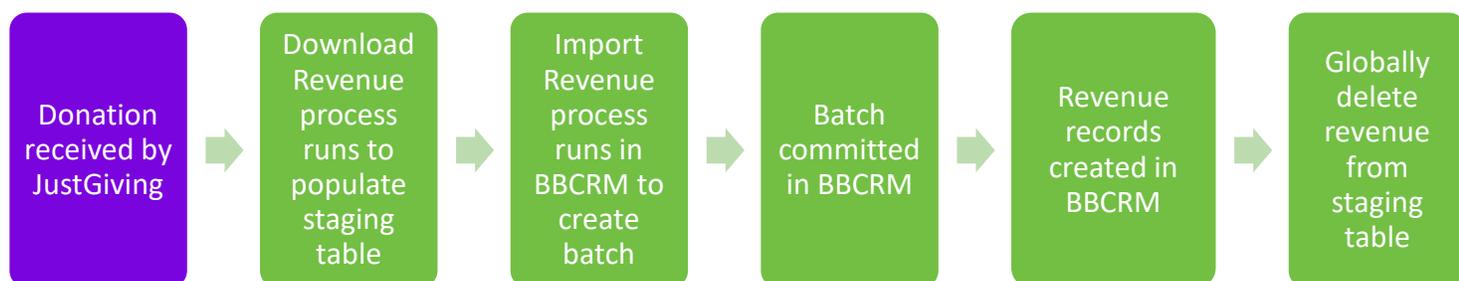
Fundraising page merge task

Merges fundraising pages for a const

Task options

JUSTGIVING REVENUE

Processing revenue requires two processes. First, the Download revenue process runs and populates a staging table with revenue records received by JustGiving. Second, a Query Import is run to import the staged revenue into BBCRM batches.



Download Revenue Process

All JustGiving Revenue download processes can be accessed by navigating to JustGiving Connector > Download revenue. One revenue download process should be configured per JustGiving charity account. Setting up a new revenue download process involves choosing the date range which you would like to download and selecting the placeholder record to be used as the donor for anonymous donations.

JUSTGIVING REVENUE DOWNLOAD PROCESS PARAMETERS

Multiple download processes may be configured. At least one process should be configured for each JustGiving API connection.

The table below explains items on the Add and Edit forms for the download process.

Screen Item	Description
Name	The name of the individual download process.
Connection name	Select the API connection option to determine which JustGiving site to download pages from.
Start date	Select whether to use a Specific date, Yesterday or Today. Note: If Specific date is selected here, it must also be selected for the End date.
Start date	If Specific date was selected for the Start date option, this field becomes available. Enter the date value directly into the field or click the calendar icon to select the date from a calendar view.
End date	Select whether to use a Specific date, Yesterday or Today. Note: If Specific date is selected here, it must also be selected for the Start date.
End date	If Specific date was selected for the End date option, this field becomes available. Enter the date value directly into the field or click the calendar icon to select the date from a calendar view.

Anonymous constituent	Search for and select the constituent record to be used as the constituent for donations that were asked to remain anonymous.
------------------------------	---

Note — The download process limits to a three month range from which fundraising pages can be download. If the start and end date options selected exceed a three-month window, an error will occur when running the process.

Import Revenue Process

After the revenue records are downloaded to the staging table, the records must be imported into custom BBCRM JustGiving revenue batches. The import processes can be accessed by navigating to JustGiving Connector > Import revenue.

The query imports use ad-hoc query results based on the new custom JustGiving Staged Revenue query view as the data source.

A typical implementation of the JG-BBCRM Connector includes the following query import processes:

1. All Donations – all donations made to a specific fundraising page.
2. All General Donations – all donations made to the charity in general.
3. All Gift Aid – applies to organizations in the United Kingdom only.

Users may have reason to break down these imports further, for example if certain types of events require different batch defaults or if anonymous donations can be automatically committed while other donations require review before commitment. Additional import processes, along with their corresponding ad-hoc queries and batch templates may be added and updated as needed.

It is recommended to individually Edit and then Save each of these processes. No parameters need to be changed, but the Save needs to occur after the initial implementation to update the appropriate database tables.

QUERY IMPORT PROCESS PARAMETERS

Multiple Query Import processes may be configured. By default, the All Donations, All General Donations, and All Gift Aid processes will be added when the connector is deployed to an environment.

The table below explains items on the Add and Edit forms of the query import process.

Screen Item	Description
Configure import file tab	
Name	Enter the name of the instance of the query import process.
Description	Enter a description of the instance of the query import process.
Site	Select the site the process should correspond with. If Site(s) are not used within your BBCRM instance, leave at All Sites.
Batch owner	Select the BBCRM application user to set as the owner of the created batches.
Batch template	The selected batch template the query import process is to use.
Ad Hoc Query	Select the JustGiving Staged Revenue Query to use for the import, or Edit the existing query criteria if needed.

Enable import handlers for this process?	By default this checkbox should remain unmarked. If additional customizations have been applied to your JG-BBCRM Connector instance this checkbox may need to be marked.
Map fields tab	
Batch template column	List the name of all fields included in the batch template.
Import file column	Select the field from the associated Ad Hoc Query and map it to the corresponding batch template field.
Set options tab	
Import workflow tab	All tabs use standard BBCRM import functionality. Refer to the Import guide for more information.
Date formats tab	
Other tab	

JustGiving Revenue Batch Type

The JG-BBCRM Connector uses a custom batch type for committing revenue to BBCRM. By default, two batch templates are created when the connector is deployed to an environment: JustGiving Donations Batch template and the JustGiving Gift Aid Batch template. The JustGiving Revenue Batch templates can be accessed by going to Administration > Batch > Batch entry > Batch templates. Additional batch templates can be configured as needed to support revenue processing requirements.

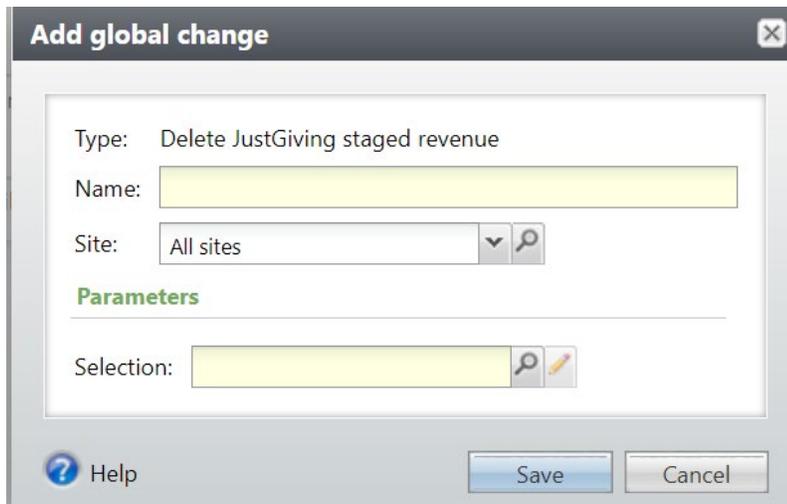
Additional batch configurations:

- JustGiving Revenue Batch Workflow – A batch workflow is created when the connector is deployed to an environment. This is applied as the default workflow to both batch templates. This workflow can be edited as needed.
- JustGiving Donations Batch Numbering Scheme – A numbering scheme is created when the connector is deployed to an environment. This is applied as the default numbering scheme to the JustGiving Donations batch template.
- JustGiving Gift Aid Batch Numbering Scheme - A numbering scheme is created when the connector is deployed to an environment. This is applied as the default numbering scheme to the JustGiving Gift Aid batch template.

The batch templates must be updated to include the default Designation that will be used for Just Giving revenue. If different Designations are needed based on different requirements, separate query import processes should be configured for each of these scenarios.

Delete JustGiving Staged Revenue Global Change

A custom global change has been added to allow users to delete revenue records that are imported into staging tables.



Add global change

Type: Delete JustGiving staged revenue

Name:

Site:

Parameters

Selection:

It is recommended to run the global change on a recurring schedule to delete records from the staging table. Revenue should not be deleted from the staging table until after the batches that contain the revenue transactions have been committed. Organizations may find it useful to not immediately delete revenue from the staging table as it can be useful for audit purposes. Each organization should determine their own policy for when to schedule the global change.

The JustGiving Staged Payment query view contains a field for 'Committed' that can be referenced to ensure revenue is not deleted if the transactions has not yet been committed to BBCRM.

JUSTGIVING CONFIGURATION

Upon implementation of the JG-BBCRM Connector, users must configure API connections, code table translations, and integration settings.

JustGiving API Connections

Multiple API connections can be configured in BBCRM to allow data from multiple JustGiving charity accounts to be brought into one BBCRM environment. Note that the JustGiving API does not feed data directly from the live website, but from a data warehouse, which is generally refreshed on a nightly basis.

To add a new API connection:

1. Navigate to the JustGiving functional area and click on the **JustGiving API Connections** task.
2. Click **Add**.
3. Enter the connection name, IDs, URLs, username, and password to be used to access your charity's JustGiving data.

 JustGiving API connections				
JustGiving API connections (4) + Add + More ▼				
Connection name	App ID	Data API app ID	JustGiving username	Site

The table below explains items on the Add and Edit forms for the API connection.

Screen Item	Description
Connection name	The name of the JustGiving API configuration instance.
Data API app ID	Enter the API application ID from the JustGiving developer account. Note: If an application has not yet been configured, refer to JustGiving API Developer Account for more information.
JustGiving username	Enter the username of the organization account used to access the JustGiving charity page.
JustGiving password	Enter the password of the organization account used to access the JustGiving charity page.
Charity ID	Enter the Charity ID of the organizations Charity Page from JustGiving. To locate this within JustGiving, log into the site and go to Settings > Edit charity details. The Charity ID is displayed within the top section of the page.
JustGiving data URL	The default URL should load after clicking Add. If not, enter: https://dataapi.justgiving.com/
Default site	If your organization uses site security, select the site to be applied to incoming JustGiving data under the 'Default site' option. This site will be applied to any constituent or tribute records added or updated by the JG-BBCRM Connector. If your organization does not use site security, or if site security is not needed for the integration, leave blank.
Only match to existing records with default site or no site	If marked, the integration will only check for potential duplicates among existing records with the configured default site.

If you want the integration to attempt to match incoming data against all records in the database, regardless of site, leave the 'Only match to existing records with default or no site' option unticked.

If your organization has multiple JustGiving charity accounts, repeat this process to create credentials for all the accounts that you wish to sync to this BBCRM environment.

JUSTGIVING API DEVELOPER ACCOUNT

The Data API app ID is an application ID generated from a JustGiving Developer account. Refer to the steps below for generating the app ID specific to the JustGiving-BBCRM integration. If there are additional questions related to the JustGiving Developer accounts, refer to: <https://justgivingdeveloper.zendesk.com/hc/en-us>.

Note: This requires an account to be set-up at the JustGiving developer site. This should be done by an administrative level user.

1. Go to <https://developer.justgiving.com/> and login, or sign up if you do not yet have an account.
2. Once logged in, go to My account > Applications.
3. Click on the application name '<Organization name>'s app'.
4. In the Plan row, click **Review/Change**.
5. Under Other plans, click **JustGiving Data API – Production and Sandbox**.
6. Scroll to the bottom of the screen and click **Request Plan Change**.

The request will then be routed to the JG admins to approve, and should be approved within 1-2 business days. Once approved, follow steps 1 – 3 above. The Application ID will be listed on the Applications page. Copy and paste this value into the Data API app ID for the JustGiving API Connection configuration within BBCRM.

JustGiving Translations

Navigate to the **JustGiving > JustGiving Translations** task to enter mappings to match JustGiving values with corresponding BBCRM codes. The available translations that exist are Country, Currencies and Titles.

COUNTRY TRANSLATIONS

All Country values must be mapped, even if the value is an exact match between JustGiving and BBCRM. If a value is not mapped, an exception message will appear for that record when downloading fundraising pages indicating which country needs to be mapped.

After adding a country mapping, users can go to the State Validation to add countries that require valid states to be mapped within the country. By default, United States and Canada are the only countries that require state translation.



The screenshot shows the 'JustGiving translations' interface. It has three tabs: 'Countries', 'Currencies', and 'Titles'. The 'Countries' tab is active, showing a sub-tab for 'Country' and 'State Validation'. Below the tabs, there is a header 'Countries (35)' with '+ Add' and 'More' options. A table displays the following data:

JustGiving country	BBCRM country
Canada	Canada
Germany	Germany
Australia	Australia

For countries that do require state translation, users can click into the country name to define the associated “State” mappings for the specific country. It is possible multiple mappings may need to exist for the same state value. For example, JG could pass a value of ‘SC’ or ‘South Carolina’. In the State mappings, two entries should be created: one with the JG value of ‘SC’ mapped to the BBCRM value of ‘South Carolina’ and one for the JG value of ‘South Carolina’ mapped to the BBCRM value of ‘South Carolina’.

If the country is configured to require valid state translations, all state mappings must be entered otherwise an exception will occur when downloading fundraising pages.

CURRENCY TRANSLATIONS

Additional currency translations can be entered to map the JG currency type to the BBCRM currency type. By default, the main currency type specific to the locale of the BBCRM environment is added during implementation.

TITLE TRANSLATIONS

Code mapping is also available for title translations. By default, several values are added here during implementation. Additional values should be added to map incoming JG title values to the corresponding BBCRM title code value.

JustGiving Connector Settings

To update the additional integration settings, navigate to JustGiving Connector > JustGiving connector settings task. This form includes configurations for events, fundraisers and donor fields, fundraiser and donor matching logic, fundraiser pages, and donations.

EVENTS CONFIGURATION

Configure the following options for event mapping.

Configuration Option	Description
Event lookup ID custom code	Identify which custom code in JustGiving stores the BBCRM event lookup ID for linking events between JG and BBCRM.
Require valid BBCRM event mappings for:	<p>This configuration determines which event records in JustGiving should be mapped to BBCRM events.</p> <ul style="list-style-type: none"> • All promoted JustGiving events – the integration requires a valid BBCRM lookup ID be populated for any events in JustGiving with the “Is Promoted” flag set to TRUE • All non user-created JustGiving events – the integration requires a valid BBCRM lookup ID be populated for any events in JustGiving with the “Is User-Created” flag set to FALSE. • Do not require mapping for any JustGiving events - the integration will not require any BBCRM event mappings and will only attempt to link pages to events when the custom code is populated.
Registration type	The registration type to apply when creating new event registrants.
Registration option name	The registration option to apply when creating new event registrants.

FUNDRAISER AND DONOR CONFIGURATION

Configure the following options around fundraisers and donors as they related to BBCRM constituents.

Configuration Option	Description
Alternate lookup ID type	The alternate lookup ID type storing the constituents JustGiving ID.
Alias type	The alias type to use when creating an alias for the constituent.
Origin source	The origin source to apply when a new constituent is created by the JG-BBCRM Connector.
Consent evidence source code	The source value to use when adding consent solicit codes.
Consent solicit code	The consent solicit code to use when consent is provided from JG.
Add consent solicit code to fundraisers?	If marked, the consent solicit code value selected above will be added to fundraiser's constituent record based on the consent option the fundraiser selected in JG. If unmarked, no consent solicit codes will be added to constituent records.

FUNDRAISER AND DONOR MATCHING LOGIC

The integration will first attempt to match fundraiser and donor constituents to existing records using the JustGiving alternate lookup ID. If no match is found, then the system will search for an exact match using the fields selected in this configuration.

- | | |
|--|------------------------------------|
| <input type="checkbox"/> Title | <input type="checkbox"/> City |
| <input type="checkbox"/> First name | <input type="checkbox"/> State |
| <input type="checkbox"/> Last name | <input type="checkbox"/> Post code |
| <input type="checkbox"/> Email address | <input type="checkbox"/> Country |
| <input type="checkbox"/> Address lines | |

If one match is found using the configured exact-match fields, then the connector will update data associated with that constituent. If multiple matches are found or if no matches are found, then the connector will create a new constituent record in BBCRM to represent the JG fundraiser or donor.

At implementation, your organization may have worked with Blackbaud to customize complex matching requirements beyond the configuration on this page.

FUNDRAISING PAGE CONFIGURATION

Configure default values related to fundraising pages.

Configuration Option	Description
Address type	The address type to be used for the fundraiser and/or donor's address.
Email type	The email address type to be used for the fundraiser and/or donor's email address.
Tribute type	The tribute type to be used when creating tribute records.

Generate exceptions for tributes with same name but different acknowledgee	When this box is marked, an exception will appear in the Fundraising Page download process for any pages with tribute details where a tribute already exists with the same name, but the fundraiser is not an acknowledgee. This page will then need to be manually reviewed and linked to the existing tribute, if appropriate.
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REVENUE CONFIGURATION

Configure default values related to revenue records.

Configuration Option	Description
Default recognition credit type	<p>The recognition credit type to be used when giving fundraisers recognition credit for payments to their pages.</p> <p><i>Note – Donors will receive the default donor recognition credit type as defined in the out-of-box Revenue > Recognition Settings area.</i></p>
Capture gift aid details as	<p>For organizations operating in United Kingdom only – The client preferred option for capturing Gift Aid information, which can be processed as either:</p> <ul style="list-style-type: none"> • Custom fields on original donation records – Gift Aid will be added to the “External Gift Aid” fields on the original donation record. • Other revenue record – Gift Aid will be added as a separate revenue record on the donor’s record with an “Other” revenue type.

AD-HOC QUERY CUSTOMIZATIONS

Custom query nodes have been added at the source view and child-node levels in ad-hoc query.

Custom Query View	Hangs from...	Parent of...	Is Source View?
Fundraising Page	Constituent Event Revenue	API Connection Constituent Notes Fundraising Event Revenue Tribute	Yes
Fundraising Event	Fundraising Page	Event	No
JustGiving Staged Revenue	None	API Connection Batch Fundraising Page Revenue	Yes
<i>For organizations operating in United Kingdom only</i>			
External Gift Aid	Revenue	None	No
Gift Aid Total	Revenue	None	No

USAGE SCENARIOS

This section includes step-by-step instructions for syncing fundraising pages and revenue from JustGiving to BBCRM. It is assumed that installation and configuration have already been completed.

Add a JustGiving Event Mapping

Description	Add a custom code to the JustGiving event record to map the JustGiving event to a corresponding BBCRM event.
Assumptions / Preconditions	One of the three custom codes available for events in JustGiving has been identified for storing the BBCRM event lookup ID. (Note: Blackbaud recommends updating the code header to 'BBCRM lookup ID' for the selected code.)
Trigger	A user identifies a fundraising event that will have JustGiving pages which should also be tracked as an event in BBCRM.
Basic Flow	<ol style="list-style-type: none"> 1. Create the event record in BBCRM (if it does not already exist). 2. Copy the event lookup ID from BBCRM. 3. Go to JustGiving and log in to your charity account (https://www.justgiving.com/charityaccount/login). 4. Navigate to Reports > Custom codes > Add event codes. 5. Locate the event that you would like to map. <i>Tip: If you are trying to map an older event, you can access previous years by clicking on another month and then updating the 'year=' parameter in the URL.</i> 6. Paste the event lookup ID from Step 2 into the appropriate custom code field. 7. Click Save changes.
Alternate Flow	<p>If the event is not a charity-promoted event, it will not appear in the event listing accessed in Step 4. Instead, a user would need to follow this flow:</p> <ol style="list-style-type: none"> 4. Navigate to Reports > Custom codes > Add fundraising page codes. 5. Locate a fundraising page for the event that you would like to map. 6. Click on the + icon to surface additional details about the page. 7. Paste the event lookup ID from Step 2 into the appropriate custom code field for the page's event codes. 8. Click Save changes. <p><i>Please note this step should only be done for events where the user-created event flag is set to FALSE. User-created events cannot be mapped to BBCRM events and any mappings added for these records will be ignored.</i></p>
Outcome	The custom code has been saved. Moving forward, any fundraising pages created for this event in JustGiving are associated with the BBCRM event and fundraisers are automatically added as BBCRM event registrants.

Download a BBCRM Event Fundraising Page

Description	Download a fundraising page from JustGiving for an event that has been mapped to an associated BBCRM event record.
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Assumptions / Preconditions	All integration configuration settings have been defined and a JustGiving fundraising page download process has been configured. The JustGiving event has been mapped to a BBCRM event.
Trigger	A user creates a fundraising page on JustGiving for an event that is linked to a BBCRM event.
Basic Flow	<ol style="list-style-type: none"> 1. Identify one or more new fundraising pages associated with a JustGiving event that has been mapped to BBCRM. 2. In BBCRM, navigate to JustGiving Connector > Download fundraising pages. 3. Click on the name of the process for the appropriate JustGiving connection. <i>Note: Organizations with only one JustGiving account will likely only have one process configured.</i> 4. Click Edit process. 5. Review the process parameters and confirm the pages from Step 1 fall within the configured date range. Click Save. 5. Click Start process. 6. When the process completes, confirm the number of records processed is as expected and review any exceptions. 7. Navigate to JustGiving Connector > Fundraising page search and search for the expected page. 8. Confirm the page has been created and is associated with the BBCRM event.
Outcome	The fundraising page has been created in BBCRM. The fundraiser has also been added as a registrant for the event.
Exception	<p>If the event has not been mapped correctly, an exception will appear in Step 7. In this case, please resolve by following the steps to Add a JustGiving Event Mapping.</p> <p>If the page is for an event that does not require a BBCRM mapping (per the integration configuration settings), the page will be created but not appear linked to any event in BBCRM. The JustGiving event details will still be visible on the fundraising page record in BBCRM.</p>

Download a non-BBCRM Event Fundraising Page

Description	Download a fundraising page from JustGiving for an event that is not / should not be mapped to a BBCRM event record.
Assumptions / Preconditions	All integration configuration settings have been defined and a JustGiving fundraising page download process has been configured.
Trigger	A user creates a fundraising page on JustGiving for an event that is not linked to a BBCRM event and should not be mapped per the integration's configured settings.
Basic Flow	<ol style="list-style-type: none"> 1. Identify one or more new fundraising pages associated with a JustGiving event that should not be mapped to BBCRM. 2. In BBCRM, navigate to JustGiving Connector > Download fundraising pages. 3. Click on the name of the process for the appropriate JustGiving connection. <i>Note: Organizations with only one JustGiving account will likely only have one process configured.</i> 4. Click Edit process.

	<ol style="list-style-type: none"> 5. Review the process parameters and confirm the pages from Step 1 fall within the configured date range. Click Save. 6. Click Start process. 7. When the process completes, confirm the number of records processed is as expected and review any exceptions. 8. Navigate to JustGiving Connector > Fundraising page search and search for the expected page. 9. Confirm the page has been created.
Outcome	The fundraising page has been created in BBCRM.
Exception	If the event should instead be mapped based on the integration configuration settings, an exception will appear in Step 7. In this case, please download the page by following the steps to Add a JustGiving Event Mapping and Download a BBCRM Event Fundraising Page .

Download a Memorial Fundraising Page

Description	Download a memorial fundraising page from JustGiving.
Assumptions / Preconditions	All integration configuration settings have been defined and a JustGiving fundraising page download process has been configured.
Trigger	A user creates a fundraising page on JustGiving with “in memory” details.
Basic Flow	<ol style="list-style-type: none"> 1. Identify one or more new fundraising pages with the ‘In Memoriam’ flag set to TRUE. 2. In BBCRM, navigate to JustGiving Connector > Download fundraising pages. 3. Click on the name of the process for the appropriate JustGiving connection. <i>Note: Organizations with only one JustGiving account will likely only have one process configured.</i> 4. Click Edit process. 5. Review the process parameters and confirm the pages from Step 1 fall within the configured date range. Click Save. 6. Click Start process. 7. When the process completes, confirm the number of records processed is as expected and review any exceptions. 8. Navigate to JustGiving Connector > Fundraising page search and search for the expected page. 9. Confirm the page has been created and is associated with the BBCRM tribute.
Outcome	The fundraising page has been created in BBCRM.
Exception	<p>If the configuration settings are configured to generate exceptions for tribute records, exceptions may occur if a tribute of the same name already exists in BBCRM and the Fundraiser is not listed as an acknowledgee on the tribute.</p> <p>To resolve, the tribute/memorial record should be updated in BBCRM and/or the configuration settings can be modified to not generate exceptions.</p>

Change Fundraiser for a Fundraising Page

The primary use case for this feature is to migrate a fundraising page from an individual's record to an organization's record. This feature should not be applied to resolve duplicate individual records, as there is a merge task available within the duplicate merge functionality.

Description	Change the fundraiser associated with a fundraising page record in BBCRM.
Assumptions / Preconditions	A fundraising page has been synced from JustGiving to BBCRM.
Trigger	A user identifies an individual fundraiser record created by JustGiving that should be an organization record.
Basic Flow	<ol style="list-style-type: none"> 1. Navigate to the Fundraising Page record. 2. Click on the Edit fundraiser action. 3. Search for and select the organization record to be used as the fundraiser. If one does not exist, create a new record. 4. Click Save. 5. Identify the JustGiving alternate lookup ID on the original individual fundraiser's record. Copy the value and then delete it from the individual record. 6. Navigate to the new organization fundraiser record. Add the value from Step 5 as a JustGiving alternate lookup ID against this record. 7. If the fundraising page is associated with an event registration or tribute, manually update the associated registrant and/or tribute acknowledgee to the organization record, as appropriate. 8. Copy the address and/or email address from the individual record to the organization record, as appropriate. If this is not manually copied, the details will be attached to the organization record if/when the page next syncs from JustGiving. 9. Delete or inactivate the individual record, as appropriate.
Outcome	The fundraising page has been moved to the organization. Any future updates to the fundraising page in JustGiving are successfully processed in BBCRM.

Download Revenue

Description	Download revenue records for JustGiving transactions.
Assumptions / Preconditions	<p>All integration configuration settings have been defined.</p> <p>The JustGiving fundraising pages download process has been run for any pages with associated revenue to be processed.</p> <p>A JustGiving fundraising revenue download process and associated query import has been configured.</p>
Trigger	A donor makes a gift via JustGiving.
Basic Flow	<ol style="list-style-type: none"> 1. Identify one or more payments from JustGiving to be brought into BBCRM. 2. In BBCRM, navigate to JustGiving Connector > Download revenue. 3. Click on the name of the process for the appropriate JustGiving connection. <i>Note: Organizations with only one JustGiving account will likely only have one process configured.</i> 4. Click Edit process.

	<ol style="list-style-type: none"> 5. Review the process parameters and confirm the payment(s) from Step 1 fall within the configured date range. Click Save. 6. Click Start process. 7. When the process completes, confirm the number of records processed is as expected and review any exceptions. 8. Navigate to JustGiving Connector > Import revenue. 9. Identify the query import(s) configured to process donations for your organization. 10. Click Start process. 11. When the process completes, confirm the number of records processed is as expected and review any exceptions. 12. Navigate to Batch entry. 13. Review and commit the newly created batch. 14. When the process completes, confirm the number of records processed is as expected and review any exceptions. 15. Confirm the revenue records have been created and are associated with the JustGiving fundraising page (where appropriate).
Alternate Flow	If the query import process is configured to auto-commit batches, Steps 12 and 13 may be skipped.
Outcome	Revenue has been added to BBCRM.

Download Gift Aid Payments

Description	Download Gift Aid details for JustGiving transactions.
Assumptions / Preconditions	<p>All integration configuration settings have been defined and the JustGiving payments download process and query import has been run for any payments with associated Gift Aid to be processed.</p> <p>A JustGiving fundraising payments download process and associated query import has been configured.</p>
Trigger	A donor makes a gift via JustGiving that qualifies for Gift Aid and JustGiving processes a payment (i.e., disbursement) for the claimed Gift Aid.
Basic Flow	<ol style="list-style-type: none"> 1. Identify one or more Gift Aid payments from JustGiving to be brought into BBCRM. 2. Confirm that donation records for the payments against which Gift Aid has been claimed have already been created in BBCRM. 3. In BBCRM, navigate to JustGiving Connector > Download revenue. 4. Click on the name of the process for the appropriate JustGiving connection. (Note: Organizations with only one JustGiving account will likely only have one process configured.) 5. Click Edit process. 6. Review the process parameters and confirm the payment(s) from Step 1 fall within the configured date range. Click Save. 7. Click Start process. 8. When the process completes, confirm the number of records processed is as expected and review any exceptions. 9. Navigate to JustGiving Connector > Import revenue. 10. Identify the query import(s) configured to process Gift Aid for your organization.

	<p>11. Click Start process.</p> <p>12. When the process completes, confirm the number of records processed is as expected and review any exceptions.</p> <p>13. Navigate to Batch entry.</p> <p>14. Review and commit the newly created batch.</p> <p>15. When the process completes, confirm the number of records processed is as expected and review any exceptions.</p> <p>16. Confirm the 'External Gift Aid' fields on the revenue records have been updated with the Gift Aid details.</p>
Alternate Flow	<p>If the query import process is configured to auto-commit batches, Steps 13 and 14 may be skipped.</p> <p>If the integration is configured to create additional revenue records for Gift Aid, the 'External Gift Aid' fields will not be populated but an additional payment record will be created instead.</p>
Outcome	The revenue record has been updated in BCRM with the Gift Aid details.

JUSTGIVING FUNDRAISING PAGE DOWNLOAD EXCEPTIONS

Many common exceptions can be resolved by updating code mappings in BBCRM, updating values in JustGiving, or manually updating BBCRM and dismissing the exception. The following table lists recommended resolutions to common exceptions.

Type	Exception Message	Resolution
New, Update	The country 'XXXX' has not been mapped to a BBCRM country.	Add a mapping for the specified country to the JustGiving Code Table Translations configuration area. OR Click Update details and change the fundraiser's country to a mapped value. Then click Save and Reprocess record .
New, Update	The state 'XXXX' has not been mapped to a BBCRM state for country 'XXXX.'	Add a mapping for the specified state to the associated country in the JustGiving Code Table Translations configuration area. OR Click Update details and change the fundraiser's state to a mapped value. Then click Save and Reprocess record . <i>Note — This error will only appear if the country is marked to 'Require valid state translation'.</i>
New, Update	A solicit code of this type and start date already exists on this constituent but with a different consent preference. Please review and updated if appropriate.	Click Update details and select the appropriate resolution. Then click Save and Reprocess record .
New	A BBCRM event lookup ID has not been configured for this event in JustGiving (Event name: XXX).	Add a custom code for the event in JustGiving with the value of the corresponding BBCRM event lookup ID. <i>Note — Any changes made to custom codes in JustGiving will not appear in the API until the data warehouse is refreshed (usually overnight), so you will likely need to wait until the following day to re-run the business process.</i>
New	The configured custom code for this event does not match an existing BBCRM event lookup ID (Custom code: XXX, Event name: XXX).	Update the custom code to match to a valid BBCRM event lookup ID. <i>Note — Any changes made to custom codes in JustGiving will not appear in the API until the data warehouse is refreshed (usually overnight), so you</i>

		<i>will likely need to wait until the following day to re-run the business process.</i>
New, Update	The tribute information on this page is a potential match to an existing tribute. Please review and link to the existing record, if appropriate.	Review the inbound tribute details and compare against existing tribute records in BBCRM. If a new tribute should be created, create a tribute record with the fundraiser as the acknowledgee. Once the existing tribute has been identified or the new tribute record has been created, click on Update details from the exception row. Search for and select the tribute record to be linked to the fundraising page.
Update	The fundraiser ID coming from JustGiving no longer matches the fundraiser in BBCRM for this page. Please review and update if appropriate.	Review the page information in JustGiving to identify what has changed. Manually update the fundraiser's constituent details, as appropriate, then dismiss the exception.
Update	The event ID coming from JustGiving no longer matches the event record linked to this page in BBCRM for this page. Please review and update if appropriate.	Review the page information in JustGiving to identify what has changed. Manually update the fundraiser's registration details, as appropriate, then dismiss the exception.
Update	The tribute information coming from JustGiving no longer matches the tribute record in BBCRM tribute record for this page. Please review and update if appropriate.	Review the page information in JustGiving to identify what has changed. Manually update the tribute details in BBCRM, as appropriate, then dismiss the exception.
New, Update	This tribute is a potential match to an existing tribute with the same name ('+@TRIBUTETEXT+') but different acknowledgee.	Review the inbound tribute details and compare against existing tribute records in BBCRM. If an existing tribute exists that should be linked to the fundraising page, update the acknowledgee on the existing tribute and then reprocess the exception.