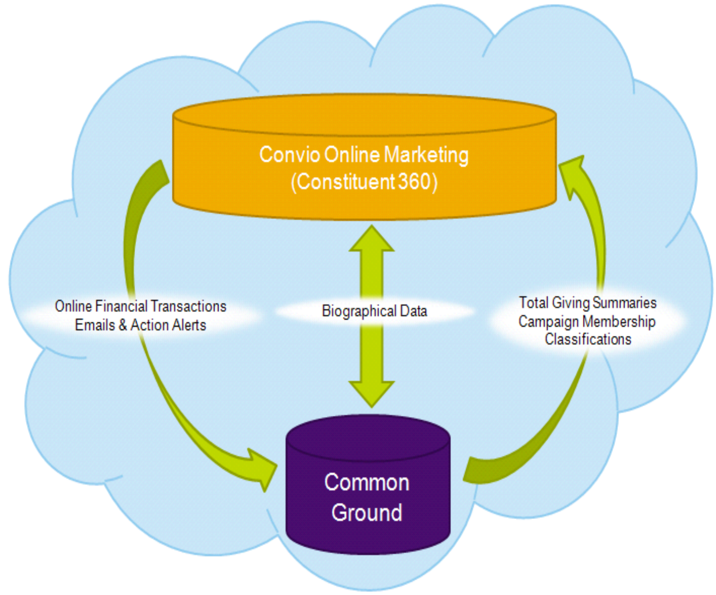
Convio Connector for Common Ground™

User's Guide

Contents

Overview

The **Convio Connector** synchronizes **Convio Common Ground**™ (**CG**) with **Convio Constituent360**™, the database that underlies the **Convio Online Marketing** (**COM**) suite of tools. This document details what data on each system gets synchronized, explains how to set up cross references, describes the ongoing maintenance of the connector, and helps troubleshoot synchronization errors.



What Data Gets Synchronized

After the connector is enabled, Constituent records and transaction data are automatically synchronized during a nightly batch run.

In general:

- Biographical Data, including all new and altered contact records in Common Ground and all new and updated Constituent records in Constituent360, is synchronized bi-directionally.
- Transactional and interaction data, including financial transactions, emails, and action alerts that take place in COM, is downloaded to Common Ground -- with certain exceptions.
- Summary and segmentation information for a contact, including total giving summaries, campaign membership, and classifications associated with a contact record in CG, are uploaded to COM and associated with the corresponding Constituent.
- TeamRaiser Registrations and Donations (not represented, above) are synchronized bi-directionally.

A CG Contact and a COM Constituent are synchronized when the connector can map a one-to-one relationship between them. Contact and Constituent records must first be successfully synchronized before transactions and interactions related to that person can be synchronized. The synchronization of specific Constituent records may be delayed; for example, if COM determines that a newly-registered Constituent may be a duplicate of an existing record and consequently queues the two potential duplicate records for review by an administrator. Missing required data in the Last Name or Email fields can also prevent constituent records from synchronizing successfully. You can review the synchronization log to determine the reason that a given constituent is not synchronized (for guidance on interpreting those logs, refer to the **Error Log Files** section below). Once the issue is resolved, the record and its related transactions will be synchronized in the next batch run.

Data Synchronized
Biographical Data
- Constituent360 Constituent - Common Ground Contact Records with Valid Email Addresses
Online Financial Transactions
Donations Made in Convio Online Marketing - One-Time Gifts - TeamRaiser Donations (added in COM or CG) - Personal Fundraising Donations - Sustaining Gifts and Payments - Refunds & Adjustments - Declined Sustaining Gift Payments eCommerce Purchases

Event Ticket Purchase financial transactions
TeamRaiser Registrations
- Registration Records (added in COM or CG) - Registration Fees (added in COM or CG) - Upsells in Convio Online Marketing
Interests
- Interests (Categories in COM, pick list values in CG)
Events
- Event Ticket Purchase as Attendee
- Event RSVP as Attendee
Online Interactions
- Email Sent and Advocacy Action taken from COM

What Data Lives Where?

Some data lives in both Convio Online Marketing and Common Ground. This reference will help determine what lives where and where, which is the primary consideration when determining where to perform segmentation.

Data Type	COM	CG
Constituent Standard Biographical	Yes	Yes
Constituent Custom Biographical	Yes (can be mapped)	Yes (can be mapped)
Constituent COM Group Membership	Yes	No (but COM groups can be built from CG data)
Constituent Campaign Membership	Yes (If mapped from CG)	Yes
Constituent Classification	Yes (If mapped from CG)	Yes
Online Transactions	Yes	Yes
Offline Transactions	TeamRaiser (entered in CG or COM)	Yes
Transaction Summaries	Yes (Online Only and Total)	Yes
Online Interactions	Yes	Yes
Offline Interactions	No	Yes
Interaction Summaries	Yes	No

How Transactions and Interactions Are Synced

Syncing of transaction and interaction records happens only if cross-references are established for the transaction or interaction type. The table below shows what transactions and interactions in Convio are synced to Common Ground, and what types of records are then created, as well as other actions that take place in Common Ground. For all cases, the transaction or interaction will be attributed to the appropriate contact in Common Ground. If the constituent taking the action via COM is new to the system, a household record will be created for them in Common Ground upon synchronization.

Action in Convio	Common Ground Record Created	Other Action in Common Ground
REGISTRATION – no Cross-Reference required		
Registration (new constituent/ contact)	Household Account Record & Household Contact Record	Marked as Head of household
DONATIONS – Use Donation Campaign or Donation form Cross-References		
One-Time Gift	Donation Record	
First -Time Sustaining Gift, Open-Ended	Recurring Gift Record & Initial Recurring Donation Record	

Subsequent Sustaining Gift Payment (open-ended, automatically scheduled)	Donation Record, Recurring Donation Type	Linked to Recurring Gift master record
First-Time Sustaining Gift, fixed number of installments	Pledge Record & Initial Pledge Installment Record	
Subsequent Sustaining Gift Payment (fixed installments, automatically scheduled)	Donation Record, Pledge Installment Type	Linked to Pledge master record
Refunded Donations	*(Record not created, already exists)*	- Donation name updated to indicate refund - Gift amount updated to reflect the value after the refund - Field tracking stores the previous amount value - For full refunds, the stage of the gift will be set to "Refunded", probability set to 0%
Declined Recurring Gifts and Pledge Installments	Donation Record, type-dependent	- recorded in Common Ground with a stage of "Declined" and the probability set to 0% - error code returned by payment gateway recorded in description field
Canceled Recurring Gifts and Pledges	*(Record not created, already exists)*	Recorded on the master record, with the reason stored in the description field.
ECOMMERCE – Use eCommerce Cross-Reference		
eCommerce Purchase	Donation Record	- Additional gift on eCommerce purchase recorded in description field - Details of purchase in description field
EVENTS – Ticketed Events Automatically Mirrored with Gala Events or Use Ticketed Event Cross-Reference, Ticket Class Cross-Reference, and RSVP Cross-Reference (without enabling mirroring)		
Event Ticket Purchase	Donation Record and Event Attendee Record	- Donation record: Detail of purchase in description field (for example, whether multiple tickets) - Event Record: if limit on number of RSVPs, decreases number available
Event RSVP	Event Attendee Record	- Event Record: if limit on number of RSVPs, decreases number available

Action in Convio	Common Ground Record Created	Other Action in Common Ground
TEAMRAISER– Use TeamRaiser Cross-Reference		
TeamRaiser Registration	TeamRaiser Registration Record & TeamRaiser Team Record (if applies)	
If payment for registration fee or additional gift at time of registration	Donation Record , TeamRaiser Registration Type (plus TeamRaiser Gift if made)	Linked to TeamRaiser Registration record of Participant
Donation to TeamRaiser Participant	Donation Record	Linked to TeamRaiser Registration record of Participant; Optional creation of relationship between Donor and Participant
PERSONAL FUNDRAISING/ TRIBUTES – Use Personal Funds Cross-Reference		
Personal Fund Registration	Tribute Record	
Gift at time of registration	Donation Record	Linked to Tribute Record of Fund Champion
Donation to fund champion	Donation Record	Linked to Tribute Record of Fund Champion ; Optional creation of relationship between Donor and Fund Champion
ADVOCACY– Use Action Alert Cross-Reference		
Action Alert Response	Campaign Membership with status value defined by Cross-Reference	
EMAIL CAMPAIGN – Use Email Campaign Cross-Reference		
Email Campaign sent to constituent	Campaign Membership with status value defined by Cross-Reference	Only one campaign membership record will be created for each constituent, regardless of how many e-mails were sent from the same campaign. The last modified date, however, will be updated to reflect the most recent activity.
INTEREST CATEGORIES – Automatically Mirrored or Use Common Ground Interest Cross-Reference		
Interest Category selected by Constituent or Administrator	Added to Existing Contact Record	Interests added in list on Contact Record of Consistent

Designations

Designations are the way to record how a donation should be spent or earmarked, as requested by the donor or programmatically defined.

You can specify designations on the following transaction types:

- Donations – You may specify designations for gifts.
- Ticket purchases – You have the option to record separate designations for ticket purchases and additional gifts made at the time of purchase.
- TeamRaiser registrations – You have the option to record separate designations for registration and additional gift made at time of registration.

There are three ways to map designations between COM and CG:

- A default designation in CG for all donations made through a COM Campaign can be set via the Campaign cross-reference.
- A default designation in CG for all donations made through a COM Donation Form can be set via the Donation Form cross-reference.
- A COM Designation can be cross-referenced to a CG designation via the Gift Designation Cross-Reference table.

See the section below on cross-referencing Gift Designations for additional information.

Contact Roles

In certain cases, a gift will need to be attributed to more than just the primary donor. In such cases, Common Ground offers a related list on donation objects called Contact Roles, with customizable options such as Solicitor and Soft Credit. All donations received in support of a TeamRaiser Participant or Personal Fund/ Tributes Champion will be linked to the TeamRaiser registration record (or Tribute record) and the TeamRaiser participant (or Fund Campion) will be assigned the Contact Role on the donation specified in the TeamRaiser (or Personal Fundraising) cross-reference.

Relationships

In Common Ground, relationships can be documented between two contacts, between a contact and an organization, or between two organizations. For TeamRaiser and Personal Fundraising / Tributes you may define associated relationship types in the TeamRaiser or Personal Fundraising cross-reference, allowing the selected relationships to be automatically created between the participant or fund champion and the donor as a part of the synchronization.

Campaign Membership

Contacts can be assigned campaign membership in Common Ground. Cross-referenced online interactions automatically create Campaign Membership records, indicating that the associated contact was included in an email appeal or other outreach activity. Although campaign membership does not sync to COM, this data can be used to build a Group in COM. Details about how to build a group based on campaign membership in Common Ground can be found in the section **Building Groups from Offline Segments**. By way of cross-reference, donations are also associated with the specified Common Ground Campaign as a part of the synchronization, for tracking and reporting purposes, but this does not automatically add the donor as a campaign member.

Events

Event ticket sales transactions for both standard ticketed events and RSVP events can be synchronized between Convio Online Marketing (COM) and Common Ground (CG). COM Event ticket sales transactions are synced with CG Gala events in either of two ways:

- Automatic mirroring
  - Automatic create events in COM based on existing events in CG.
  - Automatically create cross reference entries for events.
  - Automatically mirror updated CG values into COM.
- Manual cross-referencing
  - Manually create separate events in CG and COM
  - Manually cross-reference the events

TeamRaiser

Due to the differences between COM and Common Ground in what is allowed for TeamRaisers, some things will not sync as you might expect. Below is a list of some instances which may cause confusion.

Common Ground to COM

Team

- Teams cannot be created in COM unless they have a captain and team members.
- Team gifts entered in Common Ground will still be synced to COM even if not enabled in COM.
- Team association with a company in Common Ground will create a company and make them associated with the team even if not allowed in COM.
- If teams are not allowed in COM, then creating teams in Common Ground will not sync.

Registration

- Deleting a registration will not sync in either direction. This is true whether the registration is deleted in Common Ground or COM.
- Participation types must be manually entered in Common Ground and must match an existing type in COM. Note: No validation rules are applied; a participation type entered into Common Ground that is misspelled or does not match an existing participation type in COM will not throw an error.
- Only participants with an email address will sync to COM.
- Changing the registration date in Common Ground after it has been synced will not change the date in COM.
- Participants originated in Common Ground will get all TeamRaiser autoresponders. They will not get one for "creating a team" because the team is originating offline, not from the captain.

Gifts

- If you do not specify the payment method (cash, check, credit) in Common Ground, the default in COM will be cash.
- Only donations with 'Received' status will sync to COM and will be considered confirmed.
- Credit card donations in CG will go through to COM even if the site option F2F_ADMIN_REG_ALLOW_CARD_PROCESS has been set to False
- If you make a change in CG, such as add an upsell, after a registration has been initially synced it will not go through from CG to COM unless you make a change to the Registration Date on the CG TeamRaiser Registration Detail.
- Only cash or check donations can be edited and synced back to COM. Changes to credit card transactions will not sync.
- Although you can change the registration amount and gift amount fields in CG, the changes will not sync to COM.

Upsells

- Upsells must be created in COM in order to be synced. You cannot create an Upsell in Common Ground because it will not be created in COM.
- The upsell amount should same as that in COM. If it is different, it will sync but will not show that the cost is different in CG. It also does not sync over a different price if you edit the price. You also need to add a transaction in CG because it won't add one automatically in COM.

COM to Common Ground

Registration

- Deleting a registration in COM will not sync with Common Ground.

Gifts

- Only confirmed gifts sync to Common Ground from COM.
- Refunding an upsell or removing the checkbox next to the upsell in the the TeamRaiser Registration Profile in COM will not sync with Common Ground.
- Removing a soft credit does not change a donation in CG: it would no longer be a TeamRaiser donation. You can edit, delete, change donor, and change soft credit. (A soft credit is, in this context, an instance of marking a donation as linked to a TeamRaiser participant or team.)
- Making a gift added by an administrator anonymously in COM will set the recognition field to 'Anonymous' in CG, but will not mark the checkbox as anonymous in CG. This is because the table to check it as anonymous did not exist at the time the administrator created the gift and so it is not caught in the sync.

Exceptions to Data Synchronization

The following types of data are not synchronized between Common Ground and COM.

Constituent / Contact Records
- Constituent360 or Common Ground contact records identified as potential duplicates (held until duplicates are resolved), administrator records, records without last names or Common Ground contact records without valid email addresses
Transactional and Interactional Records
- Constituent360 transaction or interaction records associated with any of the constituent/contact records not synchronized - Common Ground ("offline") transaction or interaction records
Donations Made within COM
- If donation record originated in Convio Online Marketing, adjustments to donations in Common Ground do not sync the adjustment back to COM - Donation records added in CG, attributed as an eCommerce gift
TeamRaiser records added in COM or CG
- Upsells added in CG will not add the upsell in COM - Records deleted in CG will not be automatically deleted in COM
COM Group Membership
- Consituent360 Groups membership (however, Groups in Constituent360 can be built based on certain contact characteristics in Common Ground – refer to **Building Groups from Offline Segments**)
Interactions and Other Functionality
- Volunteer Management data from Common Ground - Survey Responses from Convio Online Marketing (unless associated with custom fields on a constituent record)
- Offline transactions entered into Common Ground (with the exception of TeamRaiser gifts and registrations) - Event Ticket purchase and RSVPs for open, multipart or multiday Events in COM, or Golf Event type in CG.

Connector Set-up Process

If you are still working with your Common Ground implementation Partner at the time you are ready to work on your Connector set-up:

Your Common Ground Authorized Implementation Partner Will:

- Point you to relevant documentation
- Help you to create campaigns in Convio Common Ground
- Open a Support case with Convio to initiate Connector set-up and track progress
- Remind you of next steps after Connector set-up is complete

You Are Responsible For:

- Setting up your cross-references in Convio Online Marketing
- Resolving any duplicates identified in Convio Online Marketing
- Viewing any error reporting in Convio Online Marketing (if present)

Convio is Responsible For:

- Working with your Common Ground Authorized Partner to understand timing of the set-up of the Connector, which will depend on data migration into Common Ground and if the COM site is live
- Working with your Common Ground authorized Partner to understand any potential data overlap in COM and CG, which will impact how quickly the Connector can be set-up
- The actual configuration of the Connector
- Informing the Partner when the configuration of the Connector is completed

Convio Client Care is available to assist you with these responsibilities and answer your questions at any time. Our Support team will also be working with your implementation partner in response to the connector setup case submitted.

If your Common Ground project has completed and you are no longer engaged with a Common Ground implementation partner, and you are ready to initiate your Connector set-up, please log a Support case (http://support.convio.com) and we will assist you with your set-up. The case should be logged as a Common Ground platform case and subject should be "*Your Organization Name* Common Ground Connector Set-Up". Our Support team will respond with several questions you will need to answer in regards to your data scenario and timing of set-up.

Planning the Synchronization

There are many important details that bear careful consideration prior to starting the cross-referencing process. In particular, campaigns, designations, and relationship types should be thought out and mapped beforehand.

Campaigns

The campaigns (for example, fundraising, email, TeamRaiser) to be tracked in Common Ground should be carefully considered. It is likely that all existing campaigns in Convio will be wanted in Common Ground, and you should carefully list those, categorize them by type, and create a corresponding campaign in Common Ground for each campaign in Convio Online Marketing you wish to track. Transactions and interactions will synchronize only once their campaigns have been properly created and cross-referenced. We highly recommend honoring identical naming conventions in both systems. You can then proceed with cross-referencing.

Events

In CG, you synchronize CG Gala event types only and only sync levels that include only one attendee for each purchase. The reason for this is simply that one attendee for each ticket purchase is an assumption built into COM. (This is true whether a purchase is for one ticket or many.) Other event types specified in Common Ground are not supported:

- CG Golf event types
- COM Multiday
- Open
- Multipart

You can only mirror one event at a time. You must set a Primary Campaign in Common Ground.

As tickets are purchased in COM, inventories are maintained in CG, and CG will show the status of the buyers as "registered" and the event invitations as for "Attendees." Ticket inventories are maintained in near real-time, with constituent details synchronized during the regularly scheduled synchronization.

In COM, when a ticket is purchased or an RSVP created, COM stores that information for sync when the next sync is scheduled to run, or is run manually. However, a task that runs approximately once every hour fills the event attendee record from COM into a placeholder in CG. This is so you know the current inventory of available tickets or RSVPs in real time. Therefore, before the actual sync occurs, within the Event record in CG you may notice "COM -> CG Integration" entries both in your event invitations and in attendees. These are the placeholder attendees from COM. The normal synchronization transfers all constituent, ticket purchase transactions, and tickets and RSVP record as event attendee information. After synchronization the placeholders will be replaced with the actual constituent names.

Designations

The designations you use also warrant careful thought. Some clients choose to use a single designation called something like "Online Giving" and map all their transactions coming in from Convio Online Marketing to Common Ground to that designation. Others choose to break the designations down into multiple categories, following their overall organizational designation structure. What you choose depends on how your organization operates, and will affect reporting and how transactions appear when they are synchronized from Convio Online Marketing into Common Ground. If you allow write-in designations in COM, we recommend cross-referencing these with a single general write in designation in Common Ground.

Relationships

The relationship types you will choose to use in Common Ground should also be thought through, particularly with regard to your TeamRaiser and Personal Fundraising (also known as Tributes) transactions. In setting up TeamRaiser and Personal Fundraising cross-references, you specify how you would like constituents recorded as relating to one another. For example, John donates in support of Jane's TeamRaiser participation. John could automatically be marked as Jane's friend or supporter in Common Ground. Common Ground does include some default relationship types that you are free to use, but you should review these before starting the synchronization process to ensure that all of them make sense for your organization. As a best practice, relationship types should be gender-neutral (i.e. "spouse," "parent," "child").

Custom Contact Field Mapping

This feature for contact records, allows custom c360 Constituent Profile fields to be mapped to and/or from custom Common Ground Contact fields, or adjusted mapping of constituent/contact standard fields (in some cases). This is only configurable by Convio staff, and so must be requested as a part of the Connector set-up process (preferred method for optimal data integrity) or as a standalone Support case after initial Connector set-up is completed.

A few considerations to be aware of concerning custom mapping:

- Custom fields can only be mapped from the Constituent Profile record in Convio Online Marketing to the Contact record in Common Ground. If you are collecting custom data on a donation form or survey, those form fields must be mapped to the Constituent Profile record in order for them to be available for custom mapping in your Connector.
- Custom mapping of multi-select pick lists or lookup fields are not supported.
- Only one-to-one custom mappings are supported. Mapping of multiple fields to a single field or a single field to multiple fields are not supported.
- Fields must be mapped to fields of a similar data type

When submitting a request for custom mapping, it is important to include the necessary details in the support case regarding the names and data types of the fields in both systems and the direction to be mapped (bidirectional or unidirectional, with direction specified.)

When a request for custom mapping is submitted, a file should be provided to indicate which fields on the contact record should be mapped. You can use the following as an example:

CG Field Name	COM Field Label	Sync from COM to CG	Sync from CG to COM
T-Shirt Size	*Size of T-Shirt*	*Yes*	*Yes*

Note: Mapping of membership fields is currently limited.

Note: Fields that are mapped after a record has been synced will not flow until an update to the record is made. Only updates to records trigger a subsequent synchronization.

Membership Data

COM Membership Types are "Membership Levels" in Common Ground.

Note: you must have Common Ground v3.0 installed to take advantage of this feature. If you are on an earlier version of CG, you can upgrade your instance, after which you will be able to sync membership levels with membership types.

If you are using COM for membership, which is recommended, the process of mapping membership types is entirely automatic. The data sync checks for COM Membership Type cross-references and, if it finds none, creates them. If the system fails to mirror any given Membership Type, you can use manual mapping to override that failure. The manual process serves as an alternative to automated mirroring, if desired.

Mirroring will be disabled until a client contacts Convio Support to request that a ***Convio administrator*** configure the site option for mirroring membership types. Mirroring entails:

- Creating a corresponding object in CG.
- Creating a cross-reference between the COM object and the new CG object.

Note: Common Ground administrators are strongly advised to create Membership Types only in COM. If you try to manage Membership Types in both COM and CG, you run the risk of unexpected changes when COM updates.

If you are just setting up your Connector, Membership data will be included automatically in your first sync

Donation Form Custom Field Mapping

This feature lets you sync custom fields in a donation record in COM to custom fields in the CG opportunity record. The mapping is one way only, from COM to CG, and it must be one-to-one (one-to-many mappings are not supported).

Note: Standard data fields cannot be included in any custom field mappings.

Transaction Sync-From Floor Dates

Only transactions made on or after a Transaction Sync-From Floor Date will be synced from COM to CG. The use of floor dates only needs to be considered when a client purchases Common Ground after having had COM for some time. If you have migrated data from a third-party system into CG, which contained some of the same transaction data in COM, you will need to use these dates so you do not create duplicate data in CG. Since Transaction Sync-From Floor Dates can be used during the Connector set-up only, you must consider them when planning the initial synchronization with your Partner. Three separate floor dates can be set for the types of transactions below: Financial transactions, intent to pay/participate records, and interactions for response to Advocacy Action Alerts.

Type of Transaction Floor Date	**Recommended Course of Action and Other Information**
Financial transactions	
Donations including: - Pledge payments and recurring gift installments - TeamRaiser and Personal Fund donations for registration fee and gifts eCommerce Purchases Event Ticket Purchases	Payments and/or installments made ***prior to the financial transaction floor date***: • will not sync from COM, based on the assumption that those records already exist in CG from another migration route. • If exist in CG from offline source, will need to be manually associated with the parent records, in order for reporting to be accurate. Payments/installments made ***post- financial transaction floor date*** on any active pledges or recurring gifts will be automatically associated with the "parent" records via the Connector. Event Ticket Purchases for events in the future.
Intent to pay/ participate parent records	
Pledge and Recurring Gift "parent" records Registration Records (act as parent records for donations to participant/ fund champion): - TeamRaiser - Personal Fundraising/ Tributes	It is usually best not set a floor date, for these parent records. Not setting that floor allows all of the parent records to be synced into CG. Considerations should be made if these types of records were migrated into Common Ground
Interactions for Advocacy	
Advocacy Action Alert response	*Note: while also an interaction, no floor date available for Email Interaction – email sent to contact.*

Automatic Mirroring: Events, Interests, and Membership Types

Mirroring can replace cross-references by automatically synchronizing objects and results of interactions with those objects between CG and COM. Since mirroring is disabled by default, you must contact Convio Support to turn it on for each of Events, Interests, and Membership Types.

With this feature enabled, Ticketed Events (CG Gala Events), Interests, and Membership Types can be automatically mirrored between COM and CG. Synchronization of Interest categories and Membership Types between Common Ground and Convio occurs with near real-time creation of them in CG when new categories and types are created.

Mirroring an Interest

The following key points need to be taken into account before mirroring an interest:

- Interests can be mirrored in Common Ground with version 2.5 and higher.
- You must set a "Primary Campaign" in Common Ground.
- Any changes or edits to an Interest in Common Ground will mirror in COM in real time.

To mirror an interest:

1. Select Constituent360 > Interests and create a new Interest Category. Only the name is required.
2. Save the Interest.
3. Click **Data Management > Import/Export** and select the “All Data Sync Operations” tab.
4. Click the **Run** action for the Convio Connector for Common Ground DataSync operation.
5. Review the Operation Information settings. Note “Mirror COM Entities into CG.”

6. Click **Next** to Configure Cross-Reference Types. After that, click **Next**.
7. Resolve any new registration conflicts. From there, click **Next** and then **Submit the Operation**.
8. Once you have run the operation, whenever you edit or create a Contact in Common Ground you will find the newly mirrored Interest under the Interests dropdown as shown:

If you click to mirror an Interest, you will encounter several grayed-out fields when you edit that Interest. Those fields must be edited in Common Ground. Most fields will not be grayed out, because they do not exist in Common Ground, but only in COM which supports a wider set of attributes.

Note: When an Interest is deleted, all related cross-references are removed.

Mirroring Membership Types

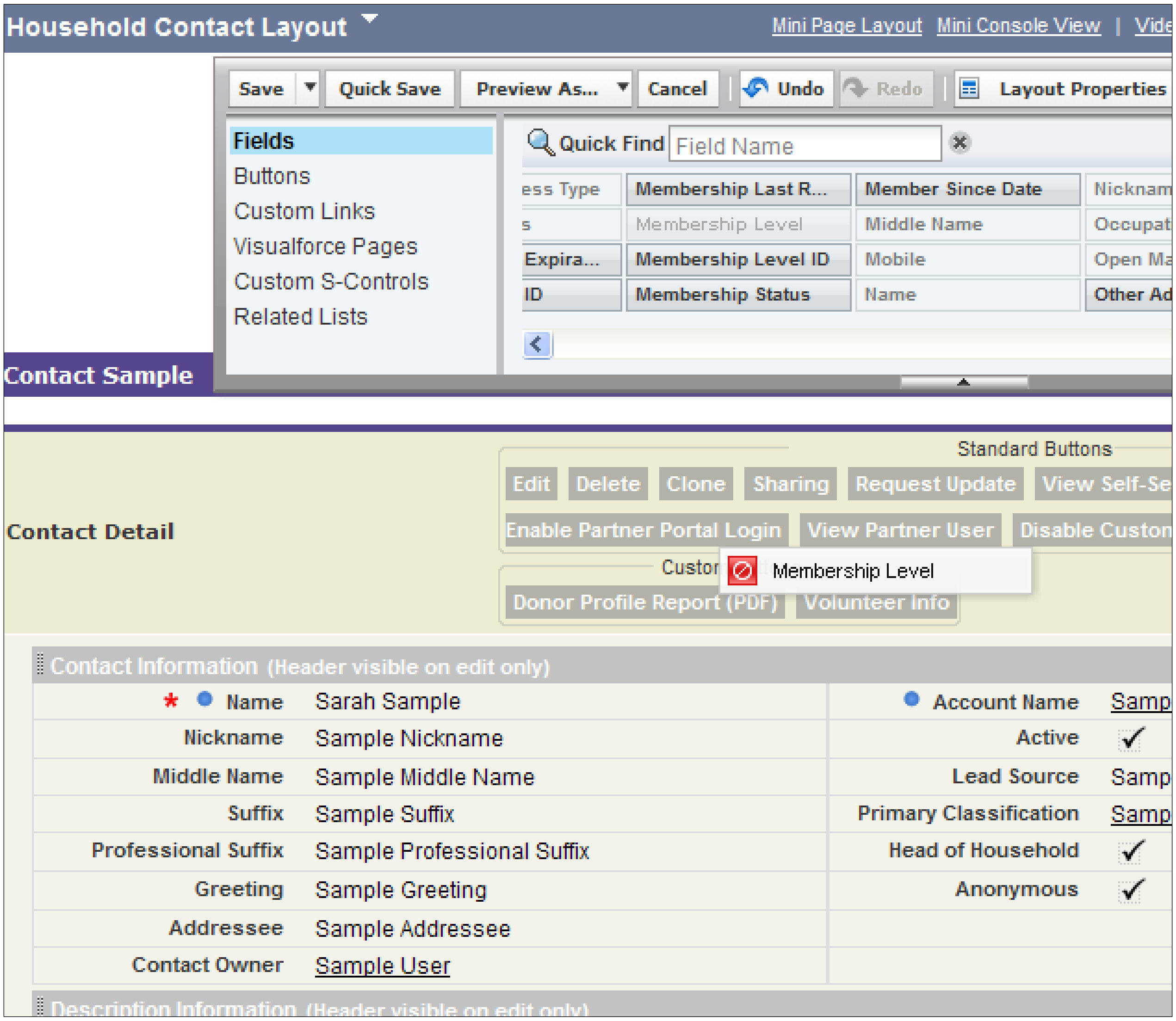
COM Membership Types are “Membership Levels” in Common Ground. The process for setting up automatic mirroring for Membership Types is virtually identical to that for mirroring Interests with one very important difference as of the present:

- You must have Common Ground 3.0 (Gargoyle) or higher installed. You cannot automatically mirror Membership Types using Common Ground 2.5.

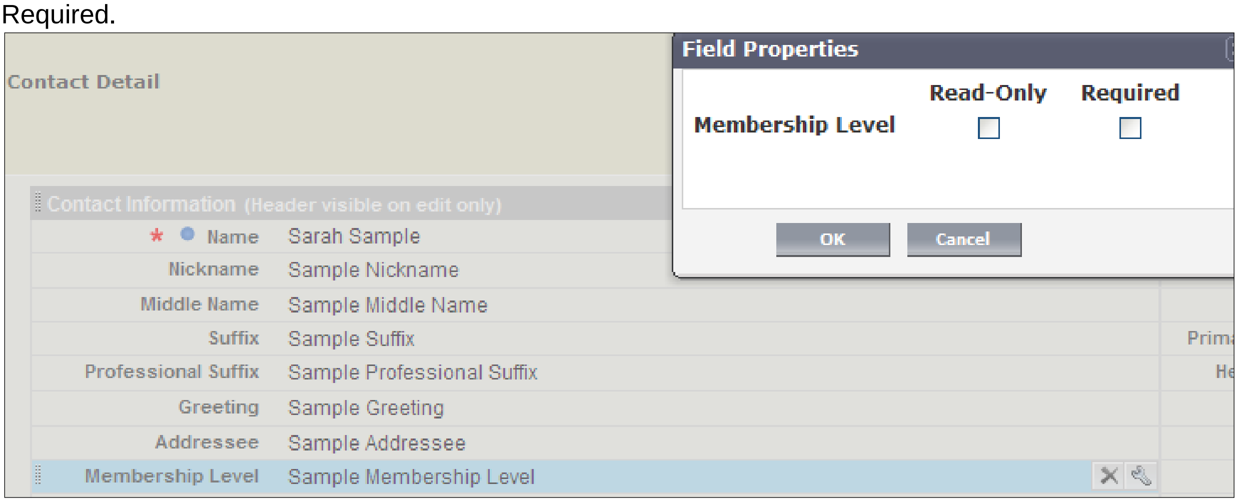
You must also, as stated above, have contacted Convio support to have Membership Type mirroring enabled. You also need to make Membership Level fields visible in Common Ground. Otherwise, you will get an error message in COM about no objects existing in Common Ground to mirror, and you will not be able to access Membership Levels in Common Ground (in Contacts) since you never enabled them.

To enable Membership Levels:

1. In Common Ground, click the Setup link, then “Customize App” and Contacts. Click on “Page Layouts” and then the edit link for the desired contact type.
2. Scroll in the top panel, as shown below, to find the Membership fields, and drag and drop where you want them to display in a Contact page.

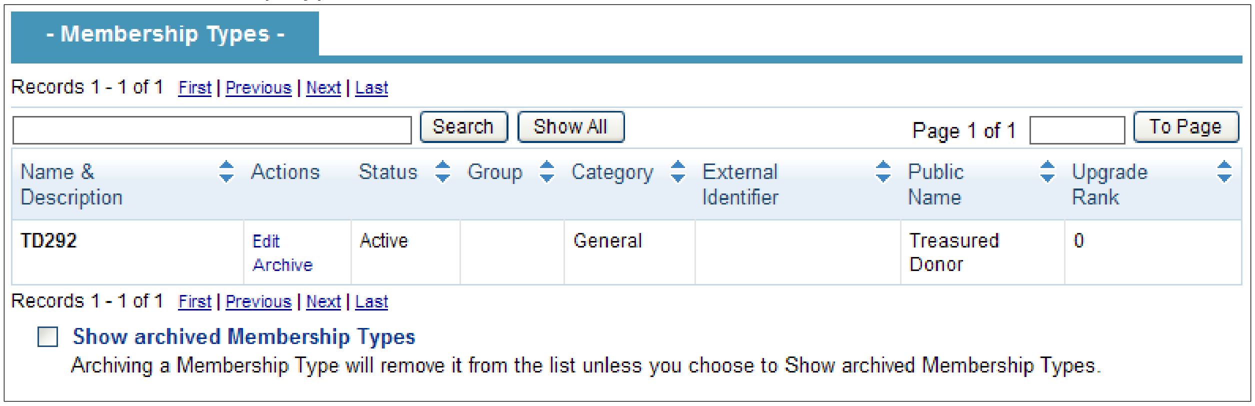


3. After you drop the field where you want it, click the tool icon to the right of the field to open a popup for configuring its behavior. As you can see in the screen capture below, the options are Read-Only and Required.

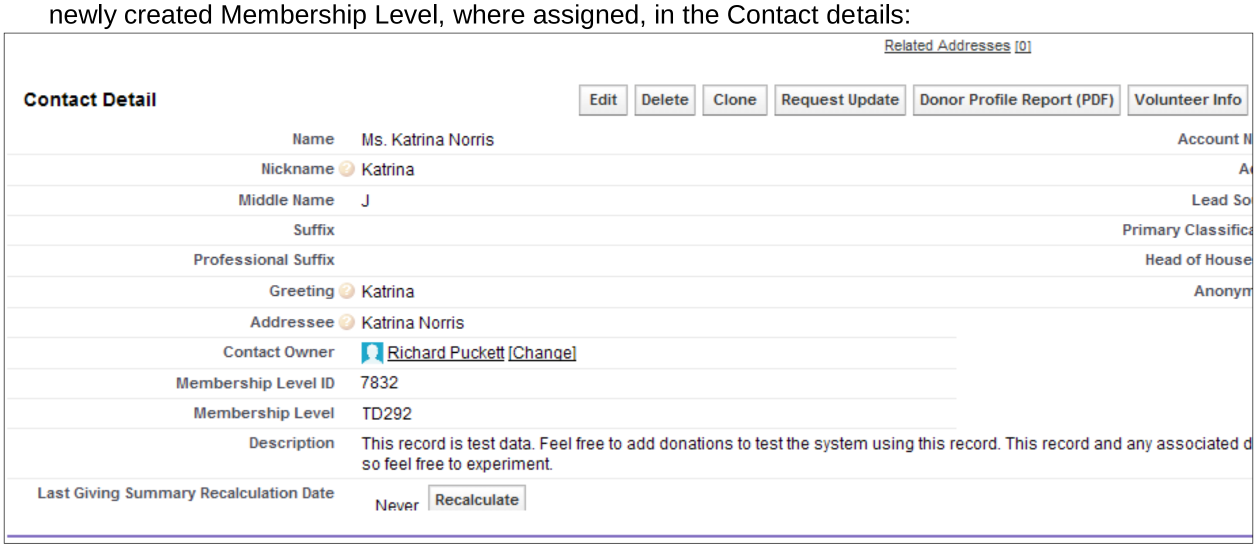


After you have enabled Membership Levels in Common Ground, return to COM to create a new Membership Type (Under Donation Management).

1. Create the Membership Type as usual.



4. After you have finished creating the Membership Type, navigate to Import/Export > Data Management and click the “All Data Sync Operations” tab..
5. Click the Run action for the Convio Connector for Common Ground DataSync operation. Review the configuration, which will be the same as for Interests, above. You will have a cross-reference in COM and a Membership Level in CG.
6. Click next to resolve any new registration conflicts.
7. From there, click Next and then run the operation.
8. After you have run the operation, when you edit or create a Contact in Common Ground you will find the newly created Membership Level, where assigned, in the Contact details:



Note: CG administrators are strongly advised to refrain from creating Interests or Membership Types in CG. Interests and Membership Types should only be created in COM and mirrored in CG.

Mirroring an Event

Once events are created within CG, system administrators can use the COM event mirroring function to import current event attributes to COM, and automatically establish all needed cross-references to ensure that such imported event attributes remain in sync with CG in the future. If any edits or updates are made to the CG event, changes are propagated to the mirrored COM event. This ensures that both the CG and COM versions of that event always contain the same attributes. Once an event to be mirrored has been created on Common Ground, the mirroring from COM is a direct process that involves pushing a button, “Mirror a Common Ground Event.”

Note: For existing events in Common Ground, you must go through the mirror and cross-referencing process in COM.

The following key points need to be taken into consideration for event mirroring:

- You can only mirror Gala events.
- You can only mirror one event at a time.
- You must set a Primary Campaign in Common Ground.
- Changes and edits in the Common Ground Event will mirror for COM administrators in real time.
- Changes and edits in the Common Ground Event will mirror for COM users after one hour.
- A Convio Administrator can configure a given Event cross-reference type to be required.
- After you click to mirror an Event or Membership Level, you will encounter several grayed-out fields when you edit it. Those fields must be edited in Common Ground. Most fields will not be grayed out; that is because they do not exist in Common Ground, only in COM.

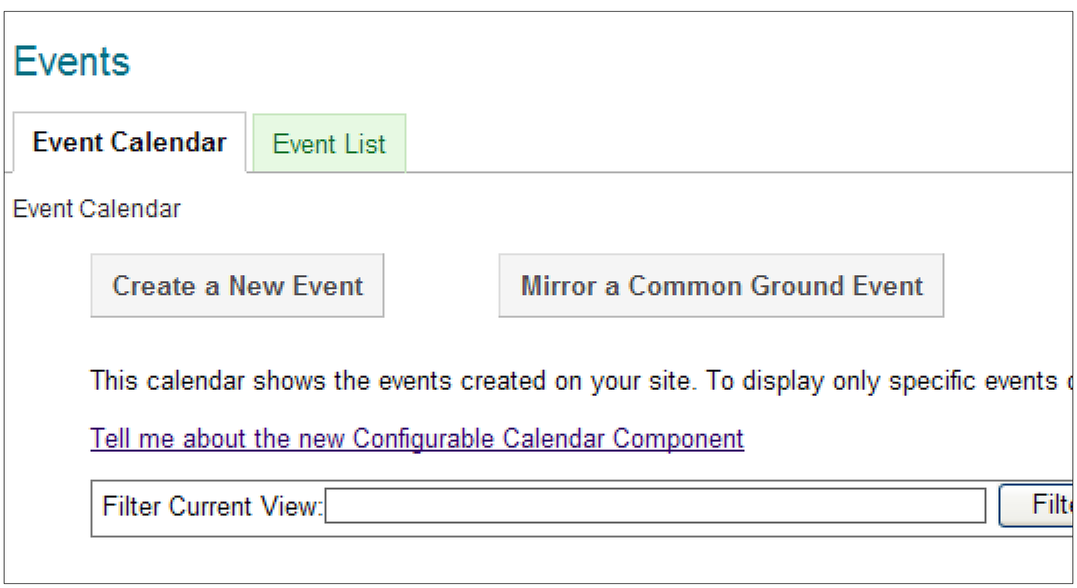
Steps to Mirror an Event

In CG, create a new Gala Event as you would normally. Be aware of two caveats:

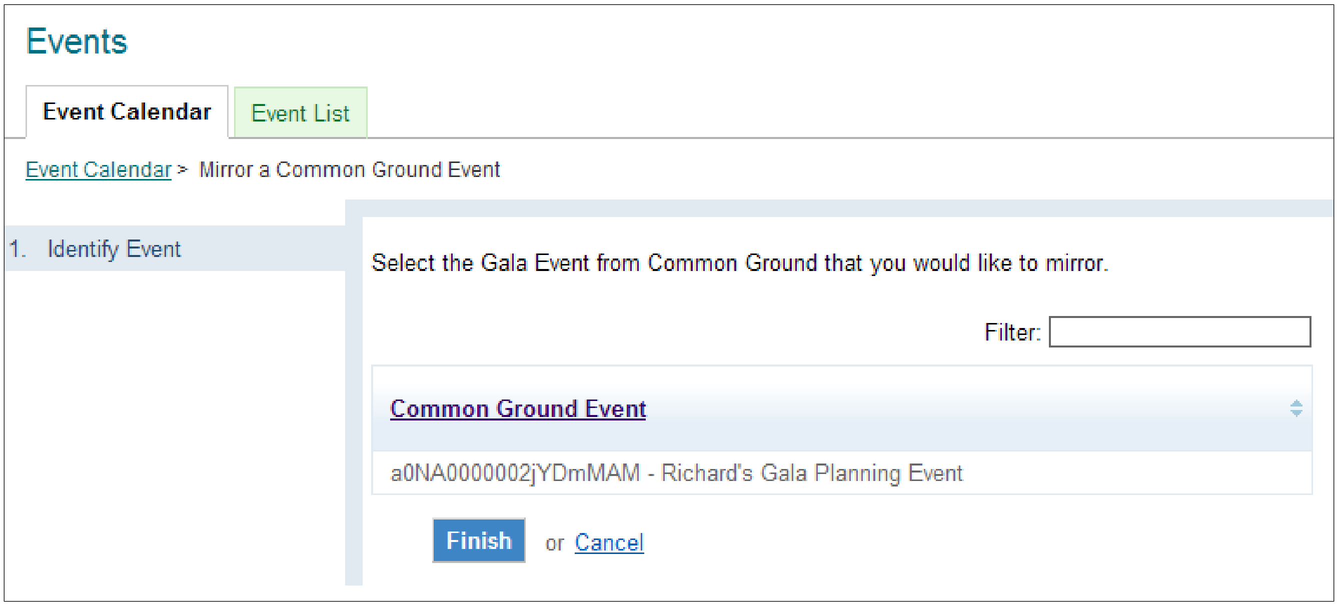
- While you can create Sponsor levels, you cannot mirror Sponsor levels.
- Only a Gala Event can be mirrored.

In COM:

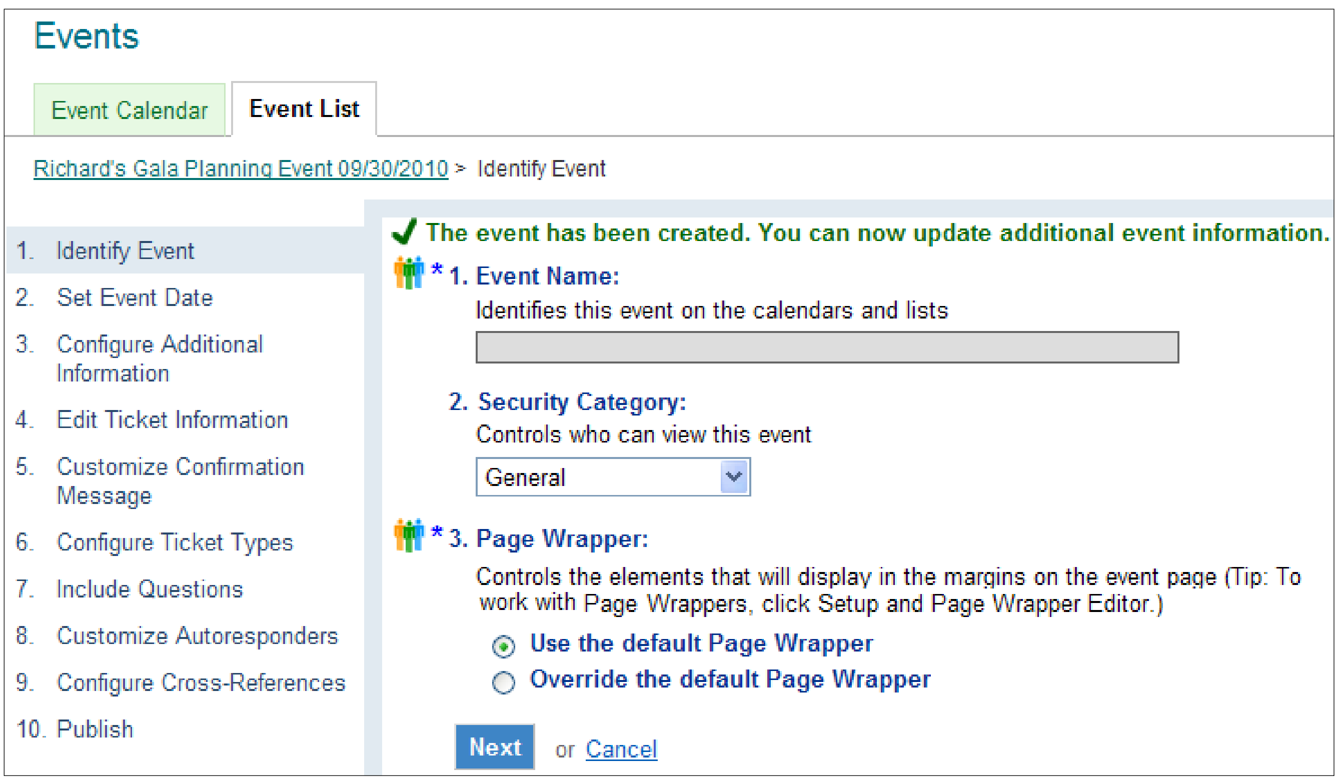
1. After you have created your Common Ground Event, click the “Mirror a Common Ground Event” button which displays on the Event Calendar page to the right of the “Create a New Event” button:



The page for you to select the Common Ground Gala Event to mirror will display, as shown:



2. After you select the event to mirror, click the Finish button. The Event List tab will be highlighted and the Event edit process flow will display. Note: The fields for Event attributes defined on Common Ground will be grayed out. You will only be able to edit the attributes that are definable exclusively in Convio COM. In the screen capture below, the Event Name, which was defined in Common Ground, is grayed out.



After you publish the mirrored event on COM, if you edit the Common Ground content, those changes will update in COM immediately for administrators.

Important: Changes made to a CG Event are not updated and available to users for one hour.

Setting up Cross References

The connector moves data back and forth between two systems in conformance with rules known as cross-references. Cross-references create one-to-one linkages between corresponding objects on COM and CG.

You will want to establish all your historical cross-references when your Connector is first implemented. After that, you will need to include setting up a corresponding Common Ground campaign and cross-reference as part of your standard business process every time you create a new campaign in Convio Online Marketing.

The process involves the following steps:

1. Log into Convio Online Marketing as an administrator.

2. Go to **Data Management > Import/Export > Donation Campaign Cross-Reference** and click the **Create New Cross-Reference** link. (If the link does not appear, then all Convio Online Marketing campaigns of that type have already been cross-referenced.)

3. Select the appropriate Convio Online Marketing value and Common Ground Campaign value. Provide any additional designation, relationship, or contact role information requested.

4. Click **Save** and the cross-reference will be applied during the next sync. Changes to a Cross-Reference affect data that is synced subsequent to the change, they will not change data that has already been synced.

When data requires cross-references, such as event ticket purchases, TeamRaisers, and the items are active before a cross-reference is made, no historical data is transferred when a cross-reference is created. Only transactions that occur after the cross-reference is made will be transmitted.

The only exception to the above is objects that do not require cross-references, which pertains solely to constituent data. Note, however that some transaction/interaction data is associated with a constituent. Below is a list of such data:

- YearToDateGiftAmount
- YearToDateGiftCount
- LifetimeGiftAmount
- LifetimeGiftCount
- FirstGiftDate
- FirstGiftAmount
- LastGiftDate
- LastGiftAmount
- LargestGiftDate
- LargestGiftAmount

Donation Campaigns

(Note: Donations made to Convio on forms that are not cross-referenced will adopt the cross-reference settings for the campaign, provided the campaign is cross-referenced. However, if the form is cross-referenced, the campaign does not also need to be cross-referenced.**)**

When you are creating the donation campaign, you will see a step in the page process flow labeled **Configuring Cross-References**. When you click on that step, you can choose the CG campaign to associate with your campaign, or create a new one before completing the step.

1. Click to choose, or enter as appropriate, the CG Donation Campaign to which you want to make a cross-reference. The value will display under **Selected Value**. If the list of CG campaigns is very long, you can narrow it down by entering part or all of a campaign's name
2. If you do not find the CG campaign you want to cross-reference, click the **Create Common Ground Object** button to create a new campaign on CG to cross-reference. When done, return to step 1.

3. Repeat the above process for cross-referencing a CG Designation for the campaign.
4. Click **Save** at any time to save your selections and continue working, or click **Finish** when you are done.

Donation Forms

(**Note:** Donations made to Convio on forms that are not cross-referenced will adopt the cross-reference settings for the campaign, provided the campaign is cross-referenced. However, if the form is cross-referenced, the campaign does not also need to be cross-referenced.)

When you are creating the donation form, you will see a step in the page process flow labeled **Configuring Cross-References**. When you click on that step, you can choose the remote system cross-reference types to associate with your donation form.

1. Click to choose, or enter as appropriate, the CG Donation form to which you want to make a cross-reference. The value will display under **Selected Value**.
2. If the list of remote forms is very long, you can narrow it down by entering part or all of a form's name.
3. If you do not find the form you want to cross-reference, click the **Create Common Ground Object** button to create a new donation form on CG to cross-reference. When done, return to step 1.

Donation Form Custom Fields

This feature enhancement is only for Common Ground data syncing and the one-to-one mapping it provides is one way, from COM to CG. Using the feature involves three distinct processes

- Configuring a custom opportunity field in Common Ground
- Configuring custom donation fields
- Creating custom donation fields

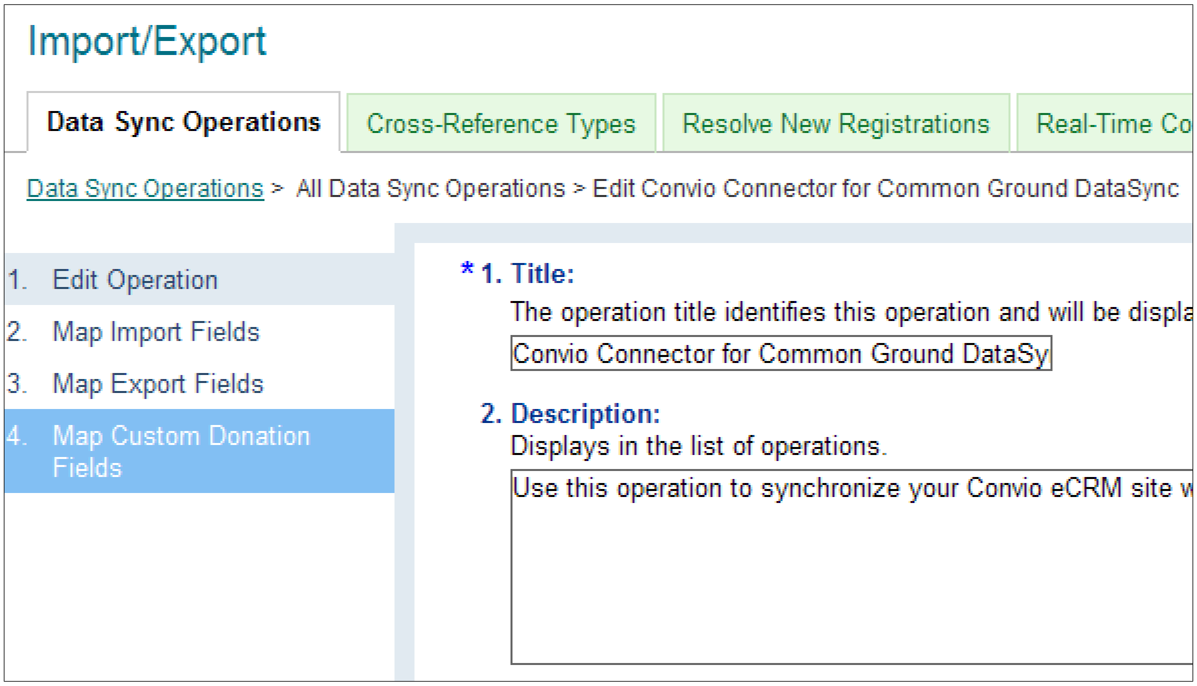
Configuring a Custom Opportunity Field in Common Ground

You need to create an opportunity field in CG to map to a custom donation field in COM. This configuration is performed under Setup > Customize. In that section, click Opportunities and Fields and then click the New button to define a new custom opportunity field.

Note: There is a ten minute caching delay before a new CG field will be available for mapping in COM.

Configuring Custom Donation Fields in COM:

Navigate to “Import/Export” under the Administrator Data Management menu. Click the “All Data Sync Operations” tab and then click the Edit action for “Convio Connector for Common Ground DataSync.”Click Step 4 in the process navigator: Map Custom Donation Fields. **Note:** this assumes you have set up a custom opportunity field in Common Ground.



On the Map Custom Donation Fields page, select the name of the Common Ground Opportunity to which you want to map this field.

Creating Custom Donation Fields and Mapping Them to Common Ground Donation Fields:

Navigate to “Donation Management” under Fundraising and either edit an existing form or create a new one.

Edit the Donation Form and create a new custom data element to include in the form. In the popup window for the custom element, there is a new step, 5. Common Ground Donation Field. Choose the Common Ground opportunity field to which you will map your custom field.

Save this custom field and add it to your donation form. That will ensure that it is added to any data sync.

After a donation is made through your custom element ($35.0 in the screen capture below),

And you have run the Convio Connector for Common Ground Data Sync,

any donations in the COM form will be recorded as well in Common Ground as shown:

Designated Giving

When you create or edit a gift designee on **Designated Giving** under **Donation Management**, you can configure a Cross-Reference as the last step in the process.

1. Click on the **Configure Cross-References** step (4). In the page that displays, click to choose, or enter as appropriate, the CG Designation to which you want to make a cross-reference. The value will display under **Selected Value**.
2. If the list of CG Designations is very long, you can narrow it down by entering part or all of a known Designation's name.
3. If you do not find the CG Designation you want to cross-reference, click the **Create Common Ground Object** button to create a new designation on CG to cross-reference. When done, return to step 1.

eCommerce Stores

When you create or edit a store, you can Configure a Cross-Reference as step 14 in the process.

1. Click on the **Configure Cross-References** step (14). In the page that displays, click to choose, or enter as appropriate, the CG Store to which you want to make a cross-reference. The value will display under **Selected Value**.
2. If the list of CG Stores is very long, you can narrow it down by entering part or all of a known store's name.
3. If you do not find the CG Store you want to cross-reference, click the **Create Common Ground Object** button to create a new store on CG to cross-reference. When done, return to step 1.
4. Repeat the above steps for creating a cross-reference to a designation for additional gifts made during purchase, and for a designation for products purchased through this store.

TeamRaisers

When you edit a TeamRaiser after it has been created, you will have available a step (15) to configure the Cross-References. You will have seven objects to cross-reference:

- Participant's Relationship to Donor
- Donor's Relationship to Participant
- Common Ground Donation Contact Role for Participant
- Common Ground Designation for donation with registration
- Common Ground Designation for registration fee
- Common Ground Campaign for TeamRaiser campaign

- Common Ground Designation for upsells

1. Click on the **Configure Cross-References** step (15). In the page that displays, click to choose, or enter as appropriate, for each of the above, the CG object to which you want to make a cross-reference. The value will display under **Selected Value**.
2. If any of the lists of CG objects is very long, you can narrow it down by entering part or all of a known object's name.
3. If you do not find the CG object you want to cross-reference, click the **Create Common Ground Object** , when available, to create a new one on CG to cross-reference. When done, return to step 1.
4. Repeat the above steps for creating a cross-reference to all seven of the above objects.

Personal Fundraising or Tributes

When you edit a campaign after it has been created, you will have available a step (10) to configure the Cross-References for a Common Ground Personal Funds Campaign.

1. Click on the **Configure Cross-References** step (10). In the page that displays, click to choose, or enter as appropriate, for each CG object in the campaign to which you want to make a cross-reference. The value will display under **Selected Value**.
2. If any of the lists of CG objects is very long, you can narrow it down by entering part or all of a known object's name.
3. If you do not find the CG object you want to cross-reference, click the **Create Common Ground Object** button, when available, to create a new one on CG to cross-reference. When done, return to step 1.
4. Repeat the above steps for creating a cross-reference to all objects.

Action Alerts

When you create or edit an Action Alert, you will have available a step (11) to configure the Cross-References for a Common Ground Ground Action Alert. You can cross-reference an existing CG Campaign or create a new one. You can also cross reference a Common Ground Campaign Membership Status object.

1. Click on the **Configure Cross-References** step (11). In the page that displays, click to choose, or enter as appropriate, for each CG object in the campaign to which you want to make a cross-reference. The value will display under **Selected Value**.
2. If any of the lists of CG objects is very long, you can narrow it down by entering part or all of a known object's name.
3. If you do not find the CG Campaign you want to cross-reference, click the **Create Common Ground Object** button to create a new one on CG to cross-reference. When done, return to step 1.

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Email Campaigns

When you create or edit an Email Campaign, you can configure a cross-reference as the last step in the process.

1. Click on the **Configure Cross-References** step (4). In the page that displays, click to choose, or enter as appropriate, the CG Campaign to which you want to make a cross-reference. The value will display under **Selected Value**.
2. If the list of CG Campaigns is very long, you can narrow it down by entering part or all of a known Campaign's name.

3. If you do not find the CG Campaign you want to cross-reference, click the **Create Common Ground Object** button to create a new on on CG to cross-reference. When done, return to step 1, above, and select the CG Campaign Membership Status to cross-reference.

Interests

If you do not request the enablement of automatic Interest mirroring, you can configure cross-references manually. You do so when you edit an Interest Category.

1. Go to Constituent360 > Interests. Either create a new Interest Category or click on the hyperlinked name of an Interest Category that already exists. The **Interest Info** page displays.

2. The last action on the page is labeled **Cross-Reference**. Use the tool to select the name of the CG Interest with which this Interest is to be cross-referenced. The value you choose displays under the **Selected Value** column.

Events

You can configure cross-references for RSVP or Ticketed Events. The process is more elaborate for Ticketed Events, as you need to configure both the Event and the Ticket(s):

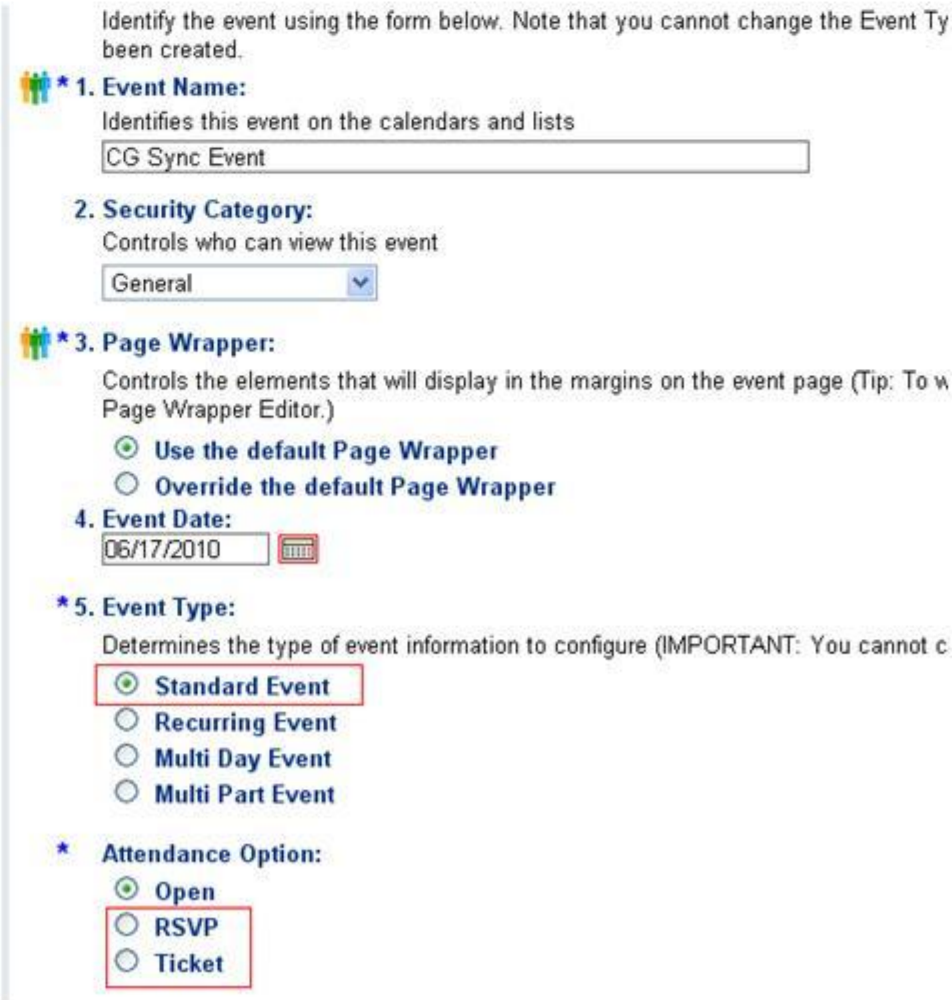
- Event Ticket Purchase Cross Reference

- Common Ground Ticket Class Cross Reference - For each ticket type in COM, you need to map it individually to the corresponding ticket level in CG. For example, if you had an event with 5 types of tickets, you would need 5 cross-references for each tickets, plus an additional cross-reference for the whole event to map the revenue associated with those tickets (see the following step).

For RSVP Events, only one Cross Reference is required: the Common Ground RSVP Cross Reference.

Setting Up the Convio (COM) Side

1. While COM has several event types, only standard RSVP or ticketed events are supported for CG synchronization. When you create a new event, on the **Identify Event** page select **Standard Event** under step ***5. Event Type***. Under **Attendance Option**, select either ***RSVP*** or ***Ticket***.



2. For Ticketed events, you need to add ticket types (on the **Create Ticket Type** page). Note that if you plan for the event to have limited attendance, you should specify the Inventory Limit both in the COM and the CG configuration.

3. After creating a new event in COM, you must set up the corresponding event on the CG side (see below).

4. Map the COM event to the CG event. For an RSVP Event, map the whole event to a ‘free’ ticket level in CG. For a ticketed event, map each type of ticket to a corresponding ticket level in CG.

Import/Export

Data Sync Operations | **Cross-Reference Types** | Resolve New Registrations | Real-Time Configuration

Cross-Reference Types

Create a new cross-reference type

Type Name	Used For	Actions	Description
Action Alert Cross-Reference	Export	Edit Delete	Use this cross-reference to map Action Alerts to Common Ground Campaigns.
Common Ground Interest Cross-Reference	Export	Edit Delete	Use this cross-reference to map Convio interests to Common Ground interests
Common Ground Membership Level Id Cross-Reference	Export	Edit Delete	
Common Ground RSVP Cross Reference	Export	Edit	Use this cross-reference to map Convio RSVP Events to Common Ground Attendee Levels
Common Ground Ticket Class Cross Reference	Export	Edit	Use this cross-reference to map Convio Calendar Ticket Class to Common Ground
Donation Campaign Cross-Reference	Export	Edit Delete	Use this cross-reference to map Convio Donation Campaigns to Common Ground Campaigns and optionally Common Ground Designations
Donation Form Cross-Reference	Export	Edit Delete	Use this cross-reference to map Convio Donation Forms to Common Ground Campaigns and optionally Common Ground Designations
Donation Time Period Length	Export	Edit	Period length xref for donation exports
E-Commerce Store Cross-Reference	Export	Edit Delete	Use this cross-reference to map transactions made through an E-Commerce store to an Common Ground Campaign
E-Mail Campaign Cross-Reference	Export	Edit Delete	Use this cross-reference to map E-mail Campaigns to Common Ground Campaigns
Gift Designation Cross-Reference	Export	Edit Delete	Use this cross-reference to map Convio designees to Common Ground designations
Group	Import	Edit	Group/Code xref for group import
Interest Import	Import	Edit Delete	Interest/Code xref for segmentation import
Personal Funds Campaign Cross-Reference	Export	Edit Delete	Use this cross-reference to map Personal Fund Campaigns to Common Ground Campaigns and related values
Record Type Setup	Export	Edit	
TeamRaiser Campaign Cross-Reference	Export	Edit Delete	
Ticketed Event Cross-Reference	Export	Edit	Use this cross-reference to map ticket purchases to Common Ground campaigns and designations
Transaction Fund	Export	Edit	Campaign xref for transaction exports (funds)

Use these two to map RSVP events and Ticket Classes to CG Event Levels

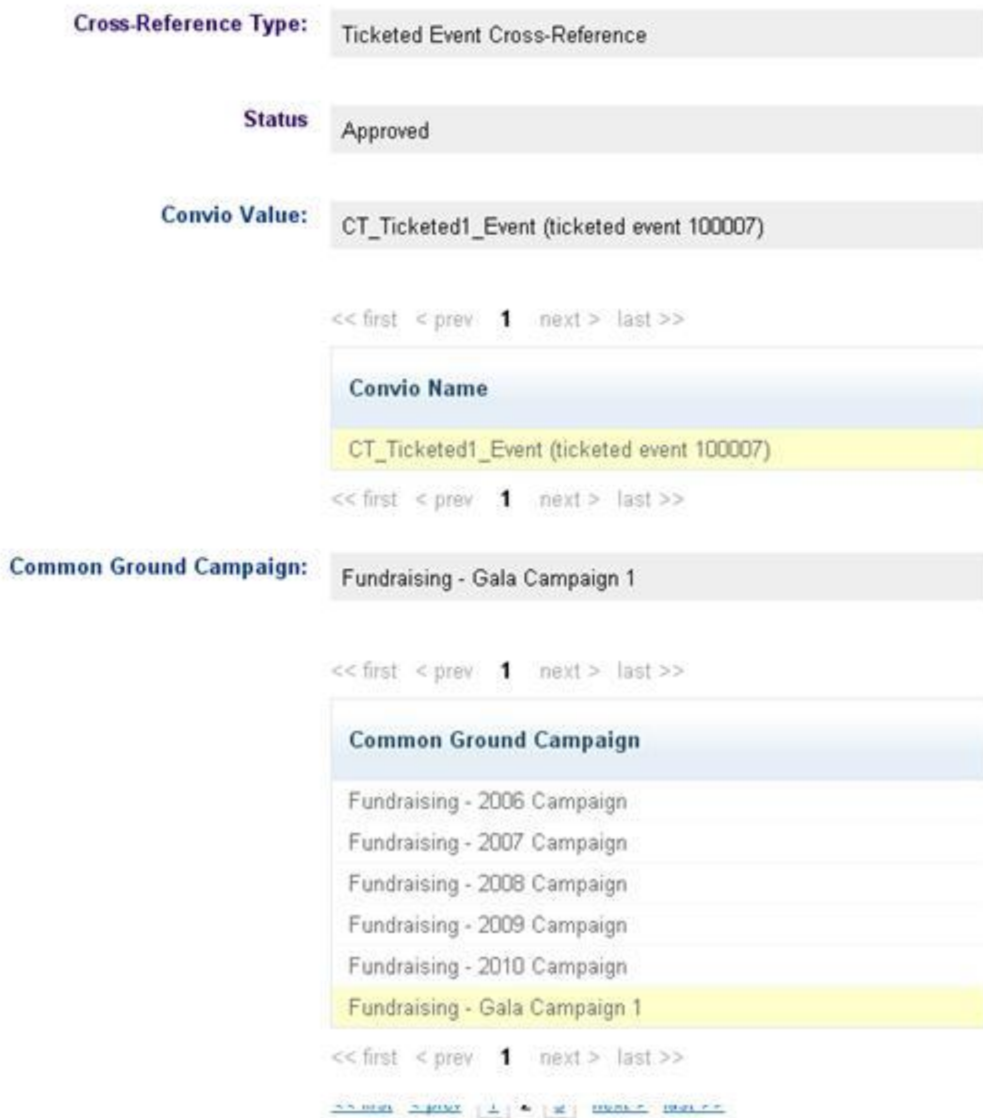
Use this XREF to map whole Ticketed events to CG Campaigns so that you can track the $ and have event invitations marked as 'paid'

5. For each RSVP event, map the whole event to an event in CG that has a single event level with no money value.

6. You need to map each ticket type in COM individually to the corresponding ticket level in CG. For example, if you had an event with 5 types of tickets, you would need 5 cross-references for each tickets, plus an additional cross-reference for the whole event to map the revenue associated with those tickets (see the following step).

7. For ticketed events only, you need to map the third cross-reference (Ticketed Event Cross-Reference). While the ticket types were mapped individually, you map an entire ticketed event to a CG campaign using this cross-reference.

Important: this mapping *must* be present for DataSync to reconcile the money received from ticket purchases and connect them to the event invitations.



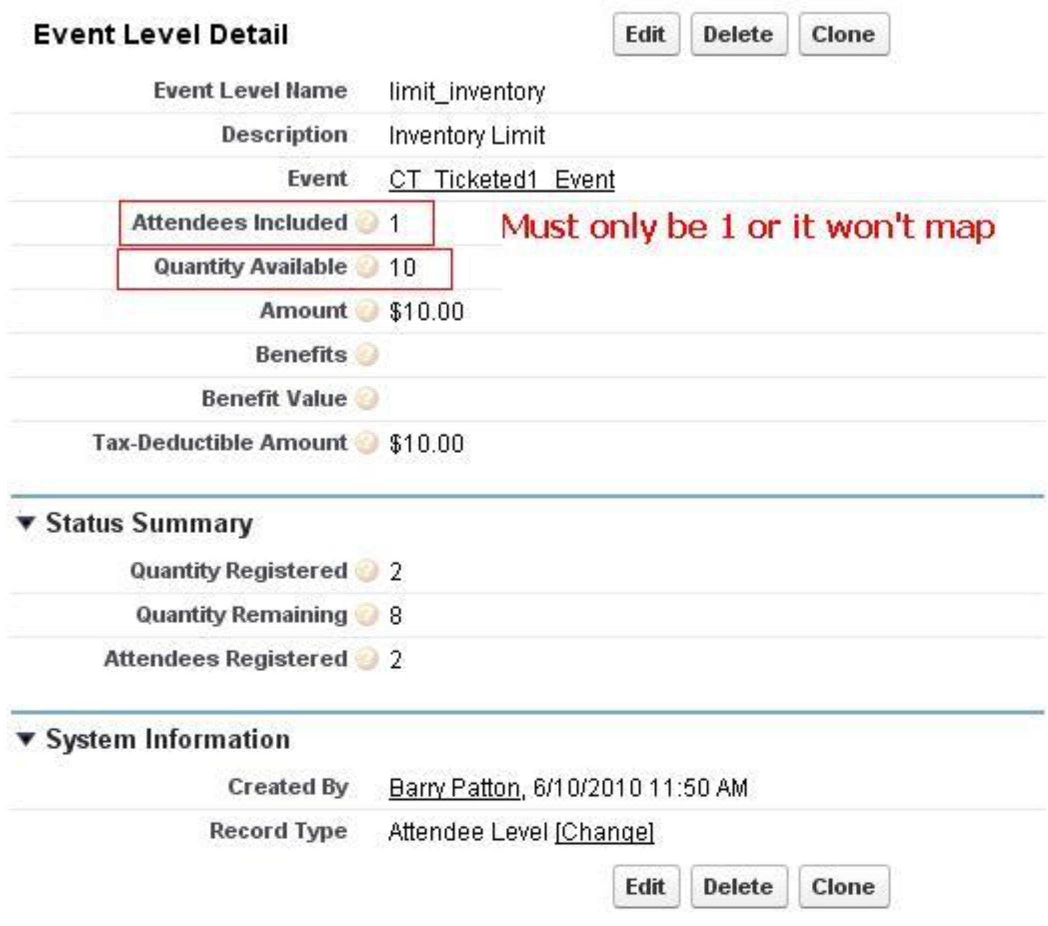
Setting Up the Common Ground (CG) Side

For synchronizing events in COM with CG, you have to create corresponding events with ticket levels for mapping.

Synchronizing Ticketed Events

You have several key points to follow when configuring the CG events to synchronize with corresponding COM events:

1. Set up each level of a ticketed event.
2. If an event had a ticket inventory limit in COM, apply the same ticket inventory limit in CG.
3. Include only 1 attendee. Multiple attendee levels are not supported.
4. Set the Amount to the same cost of the ticket you specified in COM.



Membership Levels

If you do not request the enablement of automatic Membership mirroring, you can configure cross-references manually. You do so when you create or edit a Membership Type in COM..

1. Go to Fundraising > Donation Management. Click the Membership Types tab.

2. Either click the Create New Membership Type button or click the **Edit** action for a Membership Type that already exists. On the page that displays, click step 3 of the page process flow, **Configure Cross-References**.

3. The last action on the page is labeled **Cross-Reference**. Use the tool to select the name of the CG Membership Level with which this Membership Type is to be cross-referenced. The value you choose displays under the **Selected Value** column.

Building Groups from Offline Segments

In Convio Online Marketing, administrators use groups to, among other things, send email, conditionalize content, and perform reporting. If data synchronization with Common Ground is turned on, administrators have the ability to create groups from offline segments in real time based on Common Ground contact campaign membership or contact classification.

To build such a group:

1. Ensure that the campaign or classification type you'd like to use to populate the group exists in Common Ground and has contacts associated with it.

2. Go to Constituent360, and select Groups.

3. Locate the button titled **Map a New Group to an offline Segment** and click it.

4. Name the group and optionally provide a description. If desired, set a security mode.

5. Under the Group Type drop-down, chose an existing group type or create a new one. (This is primarily for folder-style ease of location within the User Group List.)

6. Under the Map to Off-line Logical Segment drop-down, select any Common Ground campaign or Classification Type.

7. Choose how often you would like to rebuild the group, if at all. Note that if you are using a group mapped to Common Ground to include in or exclude from an email message audience, the group will rebuild automatically and immediately when the email is sent regardless of the auto-rebuild setting here.

Duplicate Management

Maintenance of Duplicates

The best practice for duplicate management when using CG and COM together is to perform merges of records that are in both systems only in Common Ground using the Common Ground Duplicate Management tool, available from the Utilities menu. Performing merges in your database of record (CG) ensures that the merge operation is occurring in the place where the greatest quantity of information is available to inform the decision. In order to enforce this practice, an error will occur if you attempt to perform the desired merge of CG records within COM. When merges of such records are performed within CG, those merges will be automatically synchronized with COM during the next sync.

Merges of record pairs where one or the other or both of the records exist only in COM (ex. resulting from a new online registration by someone already in your system), on the other hand, must still be done in COM using the Resolve New Registrations functionality. Once such records are resolved there, they will be released to flow into the synchronization to CG.

Resolving Duplicates

As new contacts are created in Common Ground and people register at your site, duplicate contact records will crop up. It is very important to regularly resolve duplicates to ensure smooth syncs. This process is called "de-duping" the database. Please note that records identified as potential duplicates and their associated transactional records will not be synchronized until they have been resolved. The Connector can be run and will synchronize all other data in the mean time.

1. From the Administrator home page, select Data Management.
2. Select Import/Export.
3. Select the Resolve New Registrations tab.
4. A list will appear of all registrations the Connector suspects might be duplicates. The left column shows the new online registration record, the middle column shows possible actions you can take, and the right column shows the existing contact record and whether it is online (in COM) or offline (in Common Ground). The column to the far right displays a probable match score.
    a. Not a match – Select this to indicate that the two records are distinct individuals. The two records will not be mistaken for duplicates in the future.
    b. Match – Select this to indicate that the two records represent the same individual. The Common Ground ID will be copied over to the eCRM constituent record so the two records will be recognized as being the same constituent in future syncs.
    c. Merge – Select this to indicate that the two records represent the same individual and to choose which information from which record represents the best data for that individual. This option is available when the information among the records might conflict and allows you to specify which information to use on both systems.
    d. Resolve Duplicates (N) – This option will appear when more than two records appear to represent the same individual. Clicking this link will allow you to resolve multiple duplicates using one of the methods described above, but for more than two records.
5. Repeat the process for each duplicate, until no more remain. You should check to be certain you have no duplicates every day until you get a feel for the frequency duplicates crop up in your organization, and schedule your resolution accordingly.

Manually Running a Data Sync Operation

The Common Ground Connector is typically scheduled to run automatically every weekday. You may also manually trigger it to run at any time, which can be helpful when diagnosing synchronization problems.

To access and run the Convio Common Ground Data Sync:

7. Choose **Data Management** on the navigation bar and then select **Import/Export** from the drop-down menu. The **Data Sync Operations** list **page** will open with the **My Data Sync Operations** tab selected.

8. Locate the **Convio Connector for Common Ground Data Sync** operation.

9. Click **Run** in the **Actions** column to start the operation. The **Operation Information** page will display.

10. Review and/or provide the following:

    1. **Operation Information:**

        - Review the **Tasks** that comprise the Data Sync operation.

        - Verify that the **Remote System Status** reads **Available**, indicating that Convio can communicate with Common Ground through the Connector. If the status is ***not*** **Available**, please see the Troubleshooting section of this document.

    2. **Operation Label:**

        - Enter an ***optional*** label that will identify this operation on the Operation Results page.

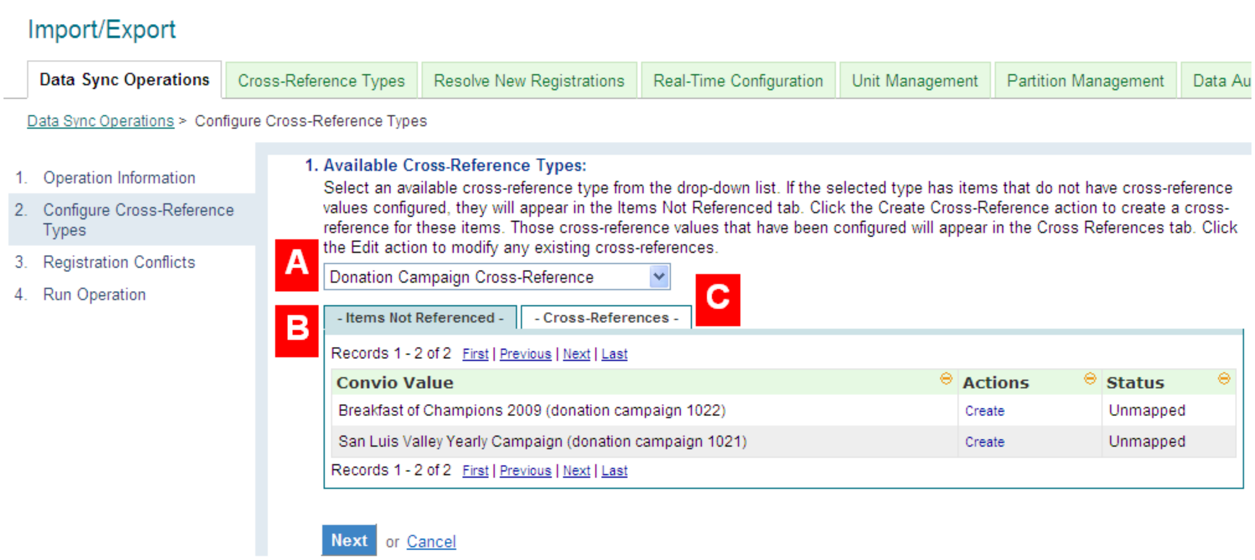
        - Note that if you leave this field blank, the operation name will serve as the label.

    3. **Operation Description:**

        - Enter an ***optional*** description that will also help identify this operation on the Operation Results page.

        - Note that if you leave this field blank, no description will be displayed on the Results page.

11. Click the **Next >>** button to move on to the **Configure Cross-Reference Types** page.



Properly defined cross-references are critical to a successful Data Sync. This page allows you to quickly and easily review the cross-reference tables relevant to your Data Sync.

12. Verify that your cross-references are in order as follows:

1. Select an appropriate cross-reference **type** from the drop-down list [**A**].

   Note: The cross-references you will need to check will depend on the Convio products you are using, but in most cases will include:

   - Donation Campaign, and
   - Donation Form

2. As you select a cross-reference type, observe the **Items Not Referenced** tab [**B**], which will populate with items of the corresponding type that are missing cross-reference entries.

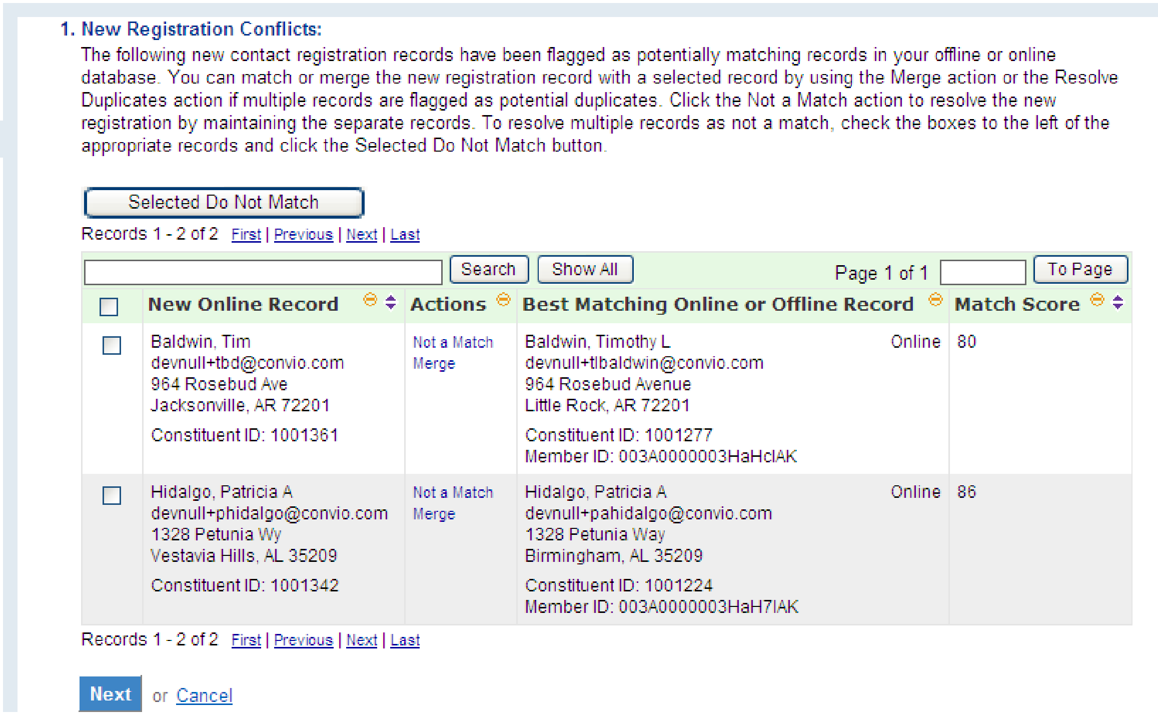
   Important: Review these lists carefully. Any transactions associated with the listed items will ***not*** be transferred to Common Ground unless you properly record the cross-reference values.

   To add a cross-reference for any item that is not already cross-referenced:

   1. Click the **Create** action beside the item that is missing a cross-reference.
   2. On the page that opens, review the:
      - **Cross Reference Type**
      - **Convio item** that you are cross-referencing
   3. Enter or select the **foreign key(s)** that the Convio item will cross-reference.
   4. Provide a **description** to identify the purpose of this cross-reference.
   5. Click **Finish** to return to the list of **Items Not Referenced**. Your newly cross-referenced item will no longer appear on that tab, but should now be listed on the Cross-References tab [**C**].

3. Click on the **Cross-References** tab [**C**] to review ***existing*** cross-reference settings for the selected type [**A**] – and any new cross-references you have just created for that type.

13. Click **Next>>** to move on to the **Registration Conflicts** page:



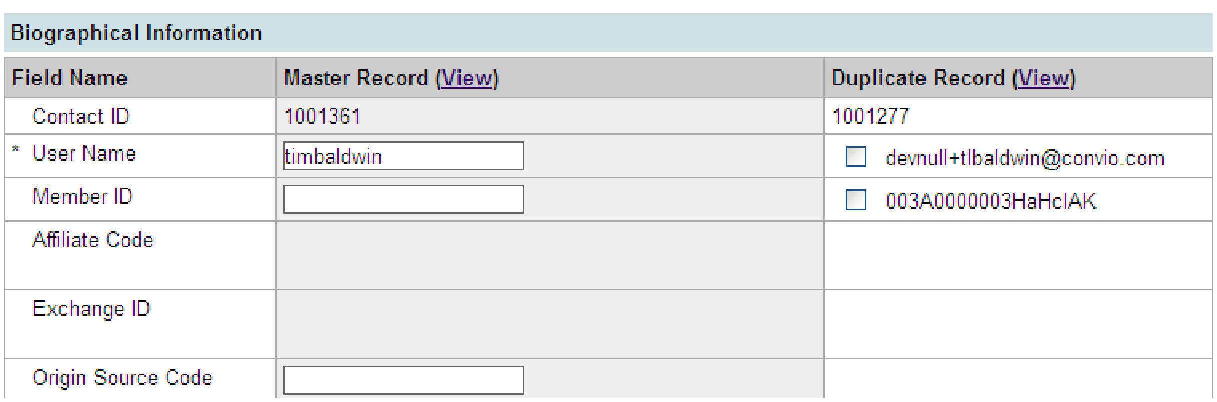
This page lists all new constituents who appear to be duplicates of existing records. Data Sync is configured to exclude from exchange processing any constituent who has been flagged as a potential duplicate of an existing Constituent360 or Common Ground constituent.

Therefore, you must review and resolve these new records as either matches to existing records or as new constituents before they are eligible for exchange.

Note: This is the same list that you can access through the **Resolve New Registrations** tab.

For the records listed, you will have the following options available:

- **Merge** – this action opens a page that compares the potential duplicate records, as shown:



You can check the fields in the Duplicate Record column that you would like to transfer to the Master Record before completing the Merge. (If the potential duplicate is an online record, you can also choose which record to retain as the Master.)

- **Match** – this action (available for Offline potential duplicates only) changes the Member ID in the online record to match the member ID in the offline (Common Ground) record, thus establishing a "linkage" between the offline and online records. By establishing this "linkage" with the member ID, both records are left intact, but all future information imported from that offline record will be placed in the corresponding online record. The potential duplicates are removed from the list immediately following the Match action.

Important: If the name/address fields are the same, the **Match** action is fine as it will move the necessary ID fields. If some fields differ, then **Merge** should be selected instead.

- **Not a Match** – this option maintains the integrity of both the new registration and the potential duplicate and immediately removes those items from the list.

14. Resolve potential duplicates by choosing **Match**, **Merge**, or **Not a Duplicate** – keeping in mind the following as you work:

- In general, the **Match** action is appropriate when the records are the same and you just want to move the (Common Ground) Member ID to the Convio record. (Note that the Master record is always a Convio record.)

- The **Match** action is also appropriate if the fields on the Convio record contain values that you want to copy to the corresponding Common Ground account.

- Select the **Merge** action when the data is slightly different and there are values on the Common Ground account that you want to retain. This option allows you to move any data that you want to persist onto the Convio record prior to synchronization. (Again, note that the Master record is always a Convio record.)

- When **Merging** constituents, it is very important that you move the Member ID carefully. This ID field contains the Common Ground ID number.

- The approach to merging duplicates will depend on whether the potential matches are **Offline** or **Online** records:

  - **For Offline Matches**:

    - *If the Master Record ID fields have values*,

      - This situation indicates you may have duplicates in your Common Ground database. Resolve the Common Ground duplicates before proceeding and then make sure that the Convio record has the ID for the record that remains in Common Ground

    - *If the Master Record ID fields are blank*,

      - You *must* merge the Common Ground ID field

  - **For Online Matches**:

    - *If both records have blank ID fields*,

      - There are no guidelines for this situation. You may merge the records as you see fit.

    - *If the Master record has blank ID fields, and the duplicate record does not*,

      - You *must* merge the Common Ground ID field

    - *If the Master record ID fields have values, and the duplicate record does not,*

      - Leave the existing ID values on the master record unchanged.

For more information on resolving duplicates please see the [Resolving New Registrations]() online help topic.

15. Click **Next>>** to go on to the **Run Operation** page.

16. Review and/or provide the following:

4. Operation Review:

- This section lists the different tasks that comprise the current Data Sync operation. Review this section once again.

- The **Remote System Status** indicates whether or not Convio can communicate with Common Ground through the Connector. If the status is ***not*** **Available,** the operation will not run. Please see the Troubleshooting section of this document in the event it is not available.

5. Email Notification:

- This is an optional field. If you specify your address, you will automatically receive a message when the operation finishes. The email will contain a report of the results of the operation.

17. Click the **Submit Operation** button to queue the Data Sync operation to run. You will be taken to the Operation Results page where you can monitor the progress of this operation. If you have specified a notification email address, you will be notified when the operation finishes.

Viewing the Operation Results

All Data Sync operations that have been submitted are listed on the Operation Results page. You can find information there about the status of each operation as well as a Process Summary for each. In addition, you will find a link to View a more detailed Report of each operation.

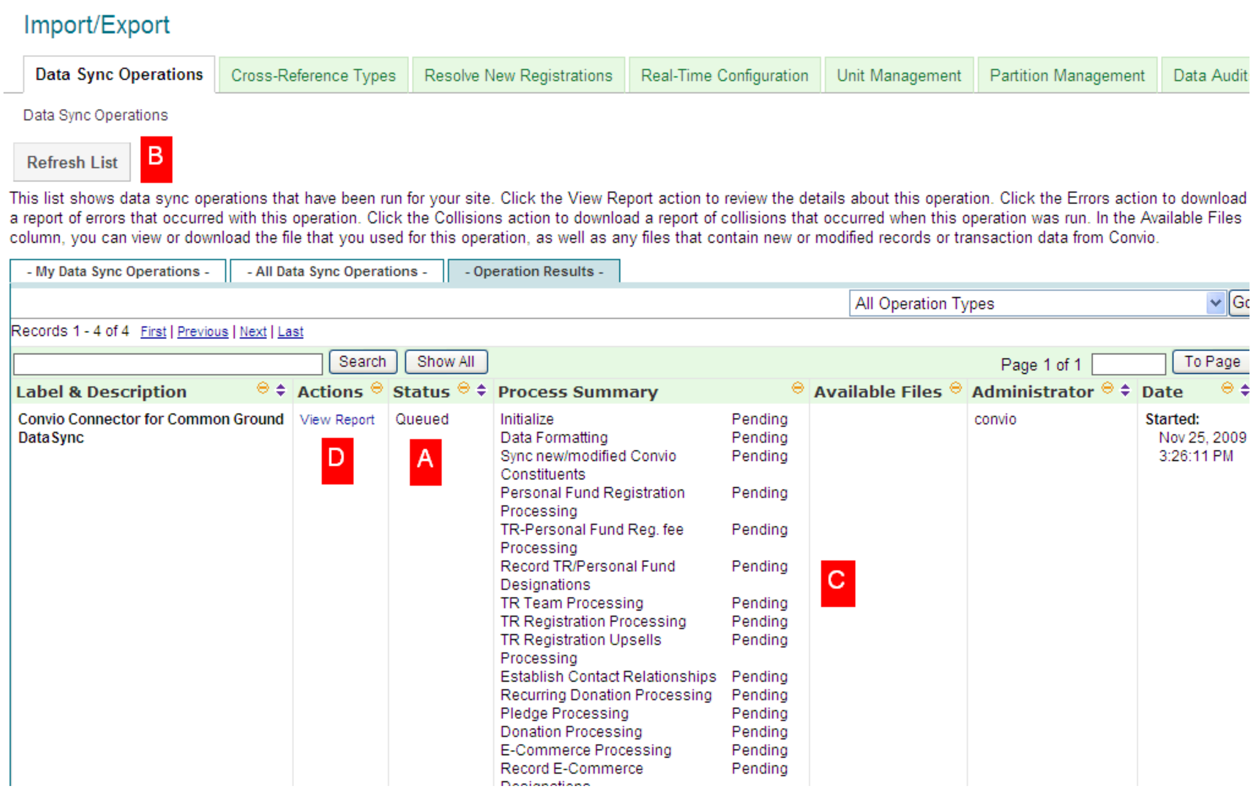
The Operation Results Page

The **Operation Results** page displays your running and completed Data Sync operations. You will automatically be taken to this page when you click **Submit Operation**, but you can also return to the page at any time.

To access and navigate the Operation Results page:

1. Choose **Data Management** on the navigation bar and then select **Import/Export** from the drop-down menu. The **Data Sync Operation** list page will open with the **My Data Sync Operations** tab selected.

2. Click the **Operation Results** tab. A typical Results page might look something like the following:

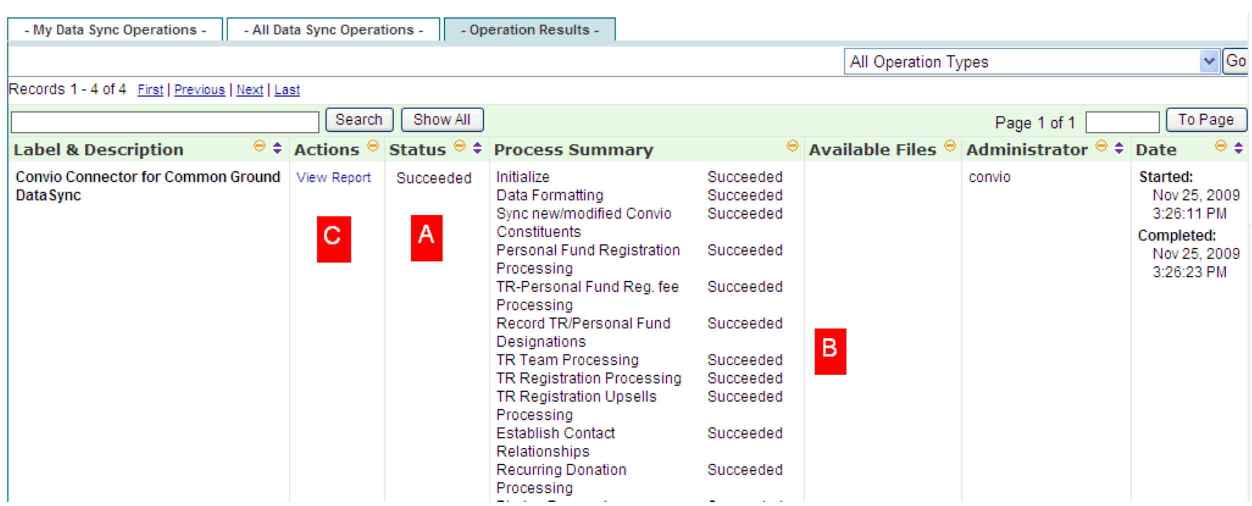


3. While the operation is still in progress, observe the following:

   - When first submitted, your Data Sync operation will be in **Queued** status [**A**]. To get the latest status, click **Refresh List** [**B**].
   - As the Data Sync operation runs, the **Process Summary** column will indicate the progress [**C**]. At any time, if you would like to get more ***detailed*** information on the progress of the operation, you can click on the **View Report** link [**D**]

4. When the operation finishes:

   - The **Status** column will display the word **Succeeded** and additional information and links will become available, as shown below:



- The **Available Files** column [**B**] will offer links for all the download files in operations that generate them. The Common Ground Data Sync operations ***do not*** consume or generate data files so this column will remain empty.

- The **Actions** column [**C**] will display from one to three links, as follows:

  - **View Report**

    - This link will always display.

    - Click on this link to see a detailed report on the results of the Data Sync operation.

  - **Errors**

    - This link will display if errors were encountered with the file that was uploaded to Convio from Common Ground*.

      - Errors for gift records may be recorded in multiple files. Hover your mouse over the link to get a detailed description of the file contents.

    - This link will take you to a CSV file that contains the record that generated the error and the error message.

    - See the troubleshooting section of this document for information on specific errors and their suggested resolution.

*Note that up to 7.csv error files may be generated, including:

- Errors encountered when writing Common Ground contact records to Convio
- Errors encountered when writing constituent records to Common Ground
- Errors encountered when writing donation records to Common Ground
- Errors encountered when writing recurring donation records to Common Ground
- Errors encountered when writing pledge records to Common Ground
- Errors encountered when writing TeamRaiser registration records to Common Ground
- Errors encountered when writing eCommerce purchase records to Common Ground
- Errors encountered when writing Action Alert response records to Common Ground

For information on interpreting these logs refer to the **Error Log Files** section below.

The View Report Page

The View Report page for each operation provides more detailed information about that operation.

It is divided into the following sections:

- **Operation Information**

  - The date, time, and type of sync that was run.

Summary

- The summary section provides counts for key processing steps.

- Pay particular attention to any entries that start with "**Number of transactions not downloaded**…" These entries typically indicate that there are missing cross-references that need to be supplied. See the **Operation Details** section of the page for more details on what was missing.

Data Files

- This section provides a consolidated view of all the files that are available on the **Operation Results** page. (Although there are no ***transfer*** files generated with this operation, this section may display any ***error*** files that were generated.)

Operation Details

- This section provides a sequential log of the Data Sync operation's actions.

- The information in this section is used in the **Summary** section mentioned above.

- The most important information in this section is the ***report of missing cross-references***. Remember that transactions for campaigns, forms, or stores that are missing cross-reference entries will be held back and not transferred to Common Ground. The following illustrates how the Donation Processing section of this page might appear if any cross-references are missing:

Beginning Donation Processing	
Donation Classic Campaign "AHS Capital Campaign" is not mapped to a Salesforce Campaign	XREF
Donation Classic Campaign "Membership Campaign" is not mapped to a Salesforce Campaign	XREF
Donation Classic Campaign "AHS Tributes" is not mapped to a Salesforce Campaign	XREF
Donation Classic Campaign "Step Towards Recovery" is not mapped to a Salesforce Campaign	XREF
Donation Classic Campaign "Memorial Campaign" is not mapped to a Salesforce Campaign	XREF
Donation Classic Campaign "AHS Membership Campaign" is not mapped to a Salesforce Campaign	XREF
Donation Classic Campaign "AHS Membership Campaign (Member Center)" is not mapped to a Salesforce Campaign	XREF
Donation Classic Campaign "Mother's Day Campaign" is not mapped to a Salesforce Campaign	XREF
Donation Classic Campaign "AHS e-Store" is not mapped to a Salesforce Campaign	XREF
Donation Classic Campaign "American Health Society" is not mapped to a Salesforce Campaign	XREF
Donation Classic Campaign "Matching Gift Pledge Drive" is not mapped to a Salesforce Campaign	XREF
Donation Classic Campaign "California Chapter Membership" is not mapped to a Salesforce Campaign	XREF
250 records processed [13:54:53]	
Ending Donation Processing	

These transactions will be sent to Common Ground once the cross-reference is defined. (Note that the sync will need to be re-run once the cross-reference is defined. For most clients, this will be done automatically by the scheduled recurring Data Sync job. You can, however, run the sync manually at any time.)

Additional Training

All clients are invited to attend a free, live online workshop focused specifically on the topic of the Convio Common Ground Connector any time additional assistance beyond what is provided here is desired. Workshops are offered approximately every two weeks. Please visit http://customer.convio.com/cgtraining for schedule and registration information.

Troubleshooting Synchronization Failures

Remote System Status is Unavailable

If the remote system is unavailable, the following illustrates what you will see when reviewing the operation details. Note that the Remote System Status is displayed on both the first and last pages of the process flow when running the operation manually.

Operation Details	
Operation:	Convio Connector for Salesforce.com DataSync
Tasks:	Initialize
	Data Formatting
	Sync new/modified Convio Constituents
	Sync new/modified SFDC Contacts
	Recurring Donation Processing
	Pledge Processing
	Donation Processing
	E-Commerce Processing
	TR Registration Txn Processing
	Link Donation to Donor
	Advocacy Response Processing
Remote System Status:	Unavailable
Schedule:	start-time=05:00 end-time=15:00 interval=08:30

When this message displays, it indicates that Convio is unable to communicate successfully with your Common Ground database through the Connector application.

Often, this system status is just a temporary condition due to network congestion or other brief outages. Please ***wait for a few minutes and try again*** before taking additional diagnostic steps.

Transaction Synch Failures

There are a number of reasons why a transaction might not synchronize, including the following:

1. A cross-reference is missing.

   - Cross-references are essential for the proper recording of gifts within Common Ground. For the gifts that were not downloaded, verify that the corresponding donation campaign or form is properly cross-referenced. You should also check the Data Sync Report to see if any missing cross-references are noted.

2. The donor is being held back as a potential duplicate.

   - Newly registered donors who have been identified as potential duplicates will not be downloaded nor will any related transactions be downloaded until the potential duplicate is resolved. Please verify that the gifts that were not downloaded are from a constituent who is not identified as a potential duplicate (see **Resolving New Registrations**)

3. The transaction was an ACH (e-check) transaction.

   - ACH transactions are verified differently from credit card transactions. While credit-card transactions are approved online in real-time and settle daily, ACH transactions take longer. ACH transactions are considered successful if no failures are reported within three days. Consequently, ACH transactions are only available for Data Sync processing three days after they occur. Verify that the missing transaction was not an ACH transaction that occurred within three days of the Data Sync process date.

Contact/Constituent Synch Failures

There are three types of new constituents who are not downloaded from your website:

1. Potential Duplicates

   - The most likely reason is that the donor is being held back as a potential duplicate. Newly registered donors who have been identified as potential duplicates will not be downloaded nor will any related transactions be downloaded until the potential duplicate is resolved. Please verify that the constituent in question has not been identified as a potential duplicate (refer to **Resolving Duplicates**).

2. Non-donors

   Note: During connector configuration, clients can opt to include only donors or all constituents. Based on that choice, this section may or may not apply.

   - To be considered for download, a constituent must have conducted a qualifying online transaction. Qualifying transactions are:

     1. An on-line financial transaction (donations only, at this time)
     2. Registration for a TeamRaiser event (no financial transaction required)
     3. An action alert response

3. Site Administrators

   - Constituents who are site administrators are never included in downloads

Error Log Files

It is good practice to review error files produced by the scheduled data sync on a regular basis. These error files can be viewed in COM by going to **Data Management** > **Import/Export** > **Data Sync Operations** tab. Next to the **Convio Connector for Common Ground DataSync** click the **Last Result** link to display a summary of what data was synced. Error files will be shown in the **Data Files** section of this page if any data was not synced due to errors. Below is a listing of some common errors seen in these files, what they mean, and what you can do to resolve these errors.

File ecrm_to_cg_cons_errors.csv

Error message: *INVALID_EMAIL_ADDRESS:Email: invalid email address: n/a@n/a.com (*NOTE: This email address is just an example. Any invalid email address will be included in the error message.)

Cause: A constituent record in COM has an invalid email address.

How to resolve: Locate the constituent record in COM and correct the email address. Next time the data sync runs the contact will be synced to Common Ground.

Error message: *INVALID_CROSS_REFERENCE_KEY:invalid cross reference id*

Cause: The Common Ground ID on this constituent's record in COM is invalid or the record in Common Ground with this ID no longer exists. Common Ground IDs should be an 18-character string beginning with 003.

How to resolve:

A. If the Common Ground ID on the COM record does not match this format, it is invalid and the data in this field should be removed from the constituent profile in COM.

B. If the Common Ground ID on the COM record does match this format, then the contact with this ID has been deleted from Common Ground. Search for this contact *by name* in Common Ground and in COM.

   a. If there is another record with this name in Common Ground, check to see if there is a corresponding record with this Common Ground ID in COM.

      i. If there is a corresponding record, the constituent records should be merged in COM. Clear out the Common Ground ID on the duplicate record in COM and merge the records.

      ii. If there is no corresponding record in COM, this may be an indication that the records should be linked. To link the records, clear out the Common Ground ID on the constituent record in COM. You can then link these records in Resolve New Registrations.

   b. If there are no other records with this name in Common Ground and the record was deleted intentionally then the record in the error file should be removed in COM.

   c. If there are no other records with this name in Common Ground and the record was accidentally deleted the record should be restored.

      i. Go to the Recycle Bin in Common Ground and look for this contact. If the contact is still in the Recycle Bin, undelete them. The record will sync the next time the connector runs.

      ii. If the record has been permanently deleted and no longer exists in the Recycle Bin, locate the record in COM and clear out the Common Ground ID field. You can then link these records in Resolve New Registrations. The records will sync after they are linked.

Error message: *ENTITY_IS_DELETED:entity is deleted*

Cause: The record in Common Ground with this ID no longer exists.

How to resolve:

Search for this contact *by name* in Common Ground and in COM.

A. If there is another record with this name in Common Ground, check to see if there is a corresponding record with this Common Ground ID in COM.

    i. If there is a corresponding record, the constituent records should be merged in COM. Clear out the Common Ground ID on the duplicate record in COM and merge the records.

    ii. If there is no corresponding record in COM, this may be an indication that the records should be linked. To link the records, clear out the Common Ground ID on the constituent record in COM. You can then link these records in Resolve New Registrations.

B. If there are no other records with this name in Common Ground and the record was deleted intentionally then the record in the error file should be removed in COM.

C. If there are no other records with this name in Common Ground and the record was accidentally deleted the record should be restored.

    i. Go to the Recycle Bin in Common Ground and look for this contact. If the contact is still in the Recycle Bin, undelete them. The record will sync the next time the connector runs.

    ii. If the record has been permanently deleted and no longer exists in the Recycle Bin, locate the record in COM and clear out the Common Ground ID field. You can then link these records in Resolve New Registrations. The records will sync after they are linked.

Error message: *REQUIRED_FIELD_MISSING: Required fields are missing: [LastName]* (NOTE: [LastName] is just an example. Any required field that is missing can be included in the error message.)

Cause: A constituent record in COM does not have information that is required in Common Ground.

How to resolve: Locate the constituent record in COM and populate the required field. The contact will be synced to Common Ground on the subsequent data sync.

Error message: *MALFORMED_ID:Contact ID: id value of incorrect type: 61249*

Cause: The Contact ID referred to in the error message is the Common Ground or Salesforce ID. Common Ground IDs should be an 18-character string beginning with 003, such as 0038000000heLuC.

How to resolve: Locate the record in error in COM by going to Constituent360 > Constituents. Enter the ID in the error message into the Common Ground ID field and click Find. Click the pencil icon to edit the record and remove the ID from the Common Ground ID field. Save the record. If a corresponding record for this contact exists in Common Ground, you can then link these records in Resolve New Registrations.

File cg_to_ecrm_cons_errors.csv

Error message: *The only active Constituent360 records matched are administrators. Administrator records cannot be updated.*

Cause: The contact record from Common Ground matches an Administrator record in COM. COM Administrator records cannot sync to Common Ground.

How to resolve:

A. If you want this Administrator's information to sync from COM to Common Ground, a separate constituent record should be created in COM for this individual. This constituent record should be matched to the contact record in Common Ground.

B. If you do not want this record to sync from COM to Common Ground, the email address should be removed from the contact record in Common Ground.

Error message:*This does not appear to be a valid email address*

Cause: A contact record in Common Ground has an invalid email address. This may be due to a typo or missing character.

How to resolve: Locate the contact record in Common Ground and correct the email address. Next time the data sync runs the contact will be synced to COM.

Error message:*The MEMBER_ID on this record (003A0000003rRPbAAN) matched multiple Constituent360 records. Only one match is allowed. Please merge the duplicate records with this MEMBER_ID in Convio.*

Cause: There are multiple constituent records with this Common Ground ID in COM. The record in Common Ground cannot sync to multiple records.

How to resolve: Search for the constituent records in COM with this ID by going to Constituent360 > Constituents. Enter the ID shown in the error message, in this case 003A0000003rRPbAAN, into the Common Ground ID field. These records are duplicates and should be merged in COM. Select which record should be the master and which is the duplicate. Clear out the Common Ground ID on the duplicate record in COM and save. Merge the records.

File ecrm_to_cg_donation_errors.csv

Error message: *ENTITY_IS_DELETED:entity is deleted*

Cause: The contact record in Common Ground with this ID has been merged or deleted and a contact record with this ID no longer exists. The donation cannot sync to Common Ground because the contact record for the donor no longer exists.

How to resolve:

Search for this contact *by name* in Common Ground and in COM.

A. If there is another record with this name in Common Ground and it represents the same person, check to see if there is a corresponding record with this Common Ground ID in COM.

    i. If there is a corresponding record, the constituent records should be merged in COM. Clear out the Common Ground ID on the duplicate record in COM and merge the records.

ii. If there is no corresponding record in COM, the records should be linked. To link the records, clear out the Common Ground ID on the constituent record in COM. You can then link these records in Resolve New Registrations.

B. If there are no other records with this name in Common Ground, or there are records but they do not represent the same person, the record should be restored.

i. Go to the Recycle Bin in Common Ground and look for this contact. If the contact is still in the Recycle Bin, undelete them. The record will sync the next time the connector runs.

ii. If the record has been permanently deleted and no longer exists in the Recycle Bin, locate the record in COM and clear out the Common Ground ID field. You can link these records in Resolve New Registrations. The records will sync after they are linked.

File cg_to_ecrm_merge_cons_errors.csv

Error message: *The MEMBER_ID on this record (003A0000003rRPbAAN) matched multiple Constituent360 records. Only one match is allowed. Please merge the duplicate records with this MEMBER_ID in Convio.*

Cause: There are multiple constituent records with this Common Ground ID in COM. The connector cannot replicate the merge that was done in Common Ground because there are multiple records with the same ID.

How to resolve: Search for the constituent records in COM with this ID by going to Constituent360 > Constituents. Enter the ID shown in the error message, in this case 003A0000003rRPbAAN, into the Common Ground ID field. These records are duplicates and should be merged in COM. Select which record should be the master and which is the duplicate. Clear out the Common Ground ID on the duplicate record in COM and save. Merge the records.

File cg_and_com_interest_exchange_errors.csv

Error message: *NO XRef mapping for Convio interest*

Cause: A cross-reference for the Convio interest does not exist.

How to resolve: Log in to COM and go to Data Management > Import/Export. Go to the Cross-Reference Types tab and click on Common Ground Interest Cross-Reference. Click the Create a new cross-reference link. Select the Convio interest from the Convio Value picklist. Select the Common Ground Interest to which the Convio interest should sync. Repeat for all Convio interests that are not cross-referenced.