



Feature Summary: Custom Field Mapping, Donations

Module: Cross Platform

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IMPORTANT NOTE: THIS DOCUMENT INTENDS TO PROVIDE A COMPLETE AND ACCURATE REPRESENTATION OF WHAT CONVIO FULLY EXPECTS TO DELIVER IN FALL 2010 (AS OF SEVERAL WEEKS PRIOR TO LAUNCH) BASED ON COMPLETED SOFTWARE DEVELOPMENT. THIS DOCUMENT AIMS TO SERVE AS THE BASIS FOR PLANNING AND PREPARATION WELL IN ADVANCE OF ACCESS TO THE NEW FEATURES. GIVEN THIS DOCUMENT WAS DRAFTED PRIOR TO COMPLETED QUALITY ASSURANCE, ALL FEATURES, CAPABILITIES, SCREENSHOTS, ANSWERS, CLIENT IMPACTS, SITE DATA, PARAMETERS, AND LIMITATIONS LISTED HEREIN, WHILE REASONABLY CERTAIN FOR INCLUSION IN THE RELEASE, ARE SUBJECT TO CHANGE AT ANY POINT UP UNTIL ROLLOUT ON YOUR CONVIO SITE.

New Concepts or Terms

None

Overview

This feature enhancement lets clients who use both Convio Online Marketing (COM) and Convio Common Ground (CG) use the standard Common Ground Connector to sync custom fields within a donation record in COM to custom fields in the CG opportunity record. Prior to this release, the ability to sync custom fields in COM and CG existed only within the constituent record. After the Convio Fall 2010 release becomes generally available, custom data field sync through the standard CG connector will be possible for both constituent and donation records.

With this feature enhancement, clients who currently use custom fields either in their COM or CG instance will have the ability to access data contained within those custom fields in both systems.

The client will have a user interface for defining custom field mappings by specific field name.

Key Features & Benefits

Features

- Ability to use the standard CG connector to sync custom donation data fields in COM and custom opportunity record fields in CG.

Benefits

- Custom donation record data fields can be shared between COM and CG. Any custom information specific to the donation record your organization may have created for use alongside the standard data elements can now be made available in both systems.

Considerations for Clients

- Field mappings can be created between custom fields in COM and custom fields in CG only – standard data fields cannot be included in any custom field mappings.

- Custom donation record field mappings must be 1 to 1 – one custom field in COM can be mapped to one custom data field in CG only. One-to-many mappings are not supported.

Feature Configuration

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.

Import/Export

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

[Data Sync Operations](#) > [All Data Sync Operations](#) > [Edit Convio Connector for Common Ground DataSync](#)

1. Edit Operation
2. Map Import Fields
3. Map Export Fields
4. Map Custom Donation Fields

*** 1. Title:**
The operation title identifies this operation and will be displayed in the list of operations.

2. Description:
Displays in the list of operations.

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

***1.Map Custom Donation Fields:**

Matches Convio custom donation fields with Common Ground custom opportunity fields

Convio Field	Common Ground Field	More Information
Clever_Element_Name	cg_opp_custom_text_1	
another_input_field	cg_text_field	

Finish or Cancel

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.

5. Common Ground Donation Field

Select the field on Common Ground to which you want to map this 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),

Please print the following for your records:

Transaction Summary

Transaction Date: 8/6/10
Amount: \$35.00

Billing Information

Title:
another input field my entry in COM
First Name: Anony
Middle Name:

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

schedule the import to run automatically at a regular interval.

My Data Sync Operations All Data Sync Operations Operation Results			
Operation & Description	Actions	Status	Last Activity
Convio Connector for Common Ground Data Sync Use this operation to synchronize your Convio eCRM site with Common Ground	Run Schedule Edit Last Result	Idle	Aug 6, 2010 12:27:41 PM by System Administrator

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

 All Donations   				
Create New View Edit Delete Refresh				
Action	Donation Name	Account Name	Amount +	Close Date
Edit Del	Anony Mouse \$60.00 Single Donation	Donor 01 Household	\$60.00	8/6/2010
Edit Del	Anony Mouse \$35.00 Single Donation	Donor 01 Household	\$35.00	8/6/2010
Edit Del	Anony Mouse \$10.00 Single Donation	Donor 01 Household	\$10.00	8/6/2010