



Feature Summary: COM to CG Interest and Membership Type Mirroring

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

Mirroring - The automatic replication of Interests and Membership Types, created and defined in Convio Online Marketing (COM), in Common Ground (CG).

Overview

Clients who use both Convio Online Marketing (COM) and Convio Common Ground (CG) to manage their constituent house file may, in some cases, find that managing their constituents' interests and membership types consumes a great deal of administrator time. The effort is necessary, however, because mismatches between the interest categories and membership types captured in COM and CG can cause data sync errors.

In the Convio Fall 2010 release of COM, we are introducing automation for managing constituent interests and membership types. The process of syncing interest categories and membership types between CG and COM will be entirely automatic, including near real-time creation of interests when new categories are created. Automated constituent interest management will reduce administrator workload and wholly mitigate a common category of data synchronization issues, thereby improving system ease-of-use.

Many errors occur when cross-references between interest categories and membership types in CG and COM are missing in the CSV file. With the release of Convio Fall 2010, the data sync checks for COM Interest and Membership Type cross-references and, if it finds none, creates them. If the system fails to mirror any given Interest or Membership Type, manual mapping can override that failure. The manual process remains unchanged, and you can use it as an alternative to automated mirroring if desired.

Key Features & Benefits

Features

- Enables automatic constituent interest category and membership type synchronization between CG and COM.

Benefits

- Automation of constituent interest and membership type management will reduce administrator workload and mitigate a common category of data synchronization issues, thereby increasing system ease-of-use.

Feature Configuration

Mirroring is the automatic replication of Interests and Membership Types, created and defined in Convio Online Marketing (COM), into Common Ground (CG). As such, the process is part of data sync. Mirroring only applies to Interests and Membership Types. That is, only Interest and Membership Types are automatically mapped between COM and CG.

The Convio Fall 2010 release will roll out with mirroring disabled. A **Convio administrator** must configure the site option for mirroring Interests and membership types (that is, clients must contact Convio Support). That process requires the configuration of two site options:

- DATA_SYNC_CG_INTEREST_MIRRORING_ENABLED to TRUE for Interest mirroring
- DATA_SYNC_CG_MEMBERSHIP_MIRRORING_ENABLED to TRUE for Membership Type mirroring

Important: Interests can be mirrored in Common Ground with version 2.5 and higher. Membership Types can only be mirrored in Common Ground with version 3.0 (Gargoyle) and higher installed.

Interests and Membership Types are created in COM and automatically mirrored in CG. Mirroring entails:

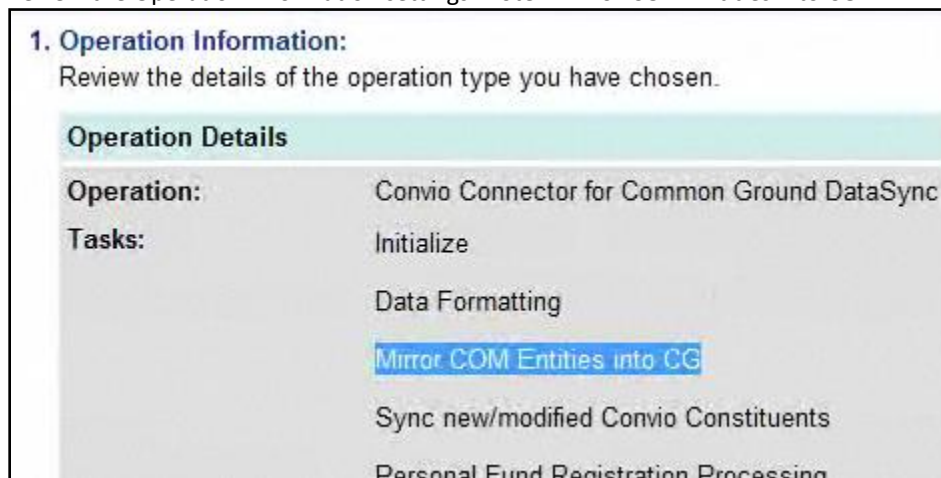
- Creating a corresponding object in CG.
- Creating a cross-reference between the COM object and the new CG object.

Common Ground administrators are strongly advised to create interests and Membership Types only in COM.

Mirroring an Interest

Important:

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



6. Click next to Configure Cross-Reference Types. From there, 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:

The screenshot shows a user interface with two main sections. The top section is titled 'Interests' and contains a dropdown menu with three options: 'Dogs', 'whatCategory', and 'Odd-Looking Cats' (which is highlighted). To the right of the dropdown is a 'Chosen' field. The bottom section is titled 'Personal Information' and contains two fields: 'Birthdate' and 'Marital Status' (which is set to 'None').

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; that is because they do not exist in Common Ground, 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. 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.

Household Contact Layout Mini Page Layout Mini Console View | View

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

- Buttons
- Custom Links
- Visualforce Pages
- Custom S-Controls
- Related Lists

Quick Find

Membership Last R...	Member Since Date	Nicknam
Membership Level	Middle Name	Occupat
Membership Level ID	Mobile	Open Ma
Membership Status	Name	Other Ad

Contact Sample

Contact Detail

Standard Buttons

Edit Delete Clone Sharing Request Update View Self-Se

Enable Partner Portal Login View Partner User Disable Custom

Custom ☒ Membership Level

Donor Profile Report (PDF) Volunteer Info

Contact Information (Header visible on edit only)

* ● Name	Sarah Sample	● Account Name	Samp
Nickname	Sample Nickname	Active	<input checked="" type="checkbox"/>
Middle Name	Sample Middle Name	Lead Source	Samp
Suffix	Sample Suffix	Primary Classification	Samp
Professional Suffix	Sample Professional Suffix	Head of Household	<input checked="" type="checkbox"/>
Greeting	Sample Greeting	Anonymous	<input checked="" type="checkbox"/>
Addressee	Sample Addressee		
Contact Owner	Sample User		

Description Information (Header visible on edit only)

- 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.

Contact Detail

Field Properties

	Read-Only	Required
Membership Level	<input type="checkbox"/>	<input type="checkbox"/>

OK Cancel

Contact Information (Header visible on edit only)

* ● Name	Sarah Sample	
Nickname	Sample Nickname	
Middle Name	Sample Middle Name	
Suffix	Sample Suffix	
Professional Suffix	Sample Professional Suffix	
Greeting	Sample Greeting	
Addressee	Sample Addressee	
Membership Level	Sample Membership Level	

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.

- Membership Types -

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Name & Description	Actions	Status	Group	Category	External Identifier	Public Name	Upgrade Rank
TD292	Edit Archive	Active		General		Treasured Donor	0

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

☐ **Show archived Membership Types**

Archiving a Membership Type will remove it from the list unless you choose to Show archived Membership Types.

2. After you have finished creating the Membership Type, navigate to Import/Export > Data Management and click the "All Data Sync Operations" tab..
3. 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.
4. Click next to resolve any new registration conflicts.
5. From there, click Next and then run the operation.
6. 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:

[Related Addresses \[0\]](#)

Contact Detail

Name	Ms. Katrina Norris	Account M	
Nickname	Katrina		
Middle Name	J		Lead So
Suffix			Primary Classifica
Professional Suffix			Head of House
Greeting	Katrina		Anonym
Addressee	Katrina Norris		
Contact Owner	Richard Puckett [Change]		
Membership Level ID	7832		
Membership Level	TD292		
Description	This record is test data. Feel free to add donations to test the system using this record. This record and any associated d so feel free to experiment.		
Last Giving Summary Recalculation Date	Never	<input type="button" value="Recalculate"/>	

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.