

How to connect GivBee to a NeonCRM account.

How to connect accounts during the GivBee sign-up process:

1. Check the box, "Connect GivBee to my NeonCRM account."
2. Enter your NeonCRM Organization ID and API Key into the appropriate boxes.

The screenshot shows the GivBee sign-up form. It includes fields for 'City*', 'State*', and 'Zip*'. Below these are fields for 'Fax' and 'Organization ID'. A checked checkbox labeled 'Connect GivBee to my NeonCRM account.' is present, with a red arrow pointing to it. To the right of this checkbox is a 'Neon CERTIFIED PARTNER' logo. Further down are fields for 'API Key' and a link 'Obtaining your API key'.

How existing GivBee account holders can connect their NeonCRM account:

1. Login to your GivBee account and click the Account Settings tab.

The screenshot shows the GivBee account settings menu. It lists 'My Campaigns', 'My Scheduled Sends', 'My Send History', 'Permissions', and 'Account Settings'. The 'Account Settings' tab is highlighted with a red arrow.

2. Scroll down to Integrations and click "Setup".

The screenshot shows the 'Integrations' section of the GivBee account settings. It displays 'Integrations: None' and a 'Setup' button, which is highlighted with a red arrow.

3. Enter your NeonCRM Organization ID and API Key then click Save.

The screenshot shows the 'GivBee currently offers integration with:' section. It features the 'neon' logo and a link 'About this integration'. Below are fields for 'NeonCRM Organization ID*' and 'NeonCRM API Key*', both of which have red arrows pointing to them. A link 'Obtaining your API key' is also present. At the bottom is a 'Save' button.

How does the integration with NeonCRM work?

OVERVIEW

GivBee is able to add data to an existing NeonCRM record, but cannot overwrite existing data. This is because NeonCRM is the system of record.

GivBee does NOT automatically create a record in NeonCRM when an individual opts-in to receive texts. More information is required before a record can be created.

To limit the possibility of record duplication, GivBee builds a mini-profile for each individual who opts-in to the GivBee text system. Only after a person's profile is complete (mobile #, first name, last name and email), does GivBee have enough info to look for a matching record in NeonCRM.

If GivBee does not find a matching record in NeonCRM, it will create a new record.

There are four ways GivBee captures data to build a record:

1. Person enters their name and email while making donation (*Fundraising Message*).
2. Person enters their name and/or email by way of a text exchange (*Inspire & Engage Message*).
3. Person enters their name and/or email into a GivBee web widget.
4. GivBee account admin manually enters or imports person's name and/or email (*Manage Groups*).

When an update is made inside a NeonCRM record , GivBee is able to *update* the corresponding data in GivBee.

NeonCRM records generated by GivBee are labeled "GivBee Texting" in the NeonCRM field: *Origin Detail*.

Data exchanges between GivBee and NeonCRM are automatic -- within seconds of a person completing a donation (*Fundraising Message*) or having a text exchange (*Inspire & Engage Message*). No data sync is needed.

Passing donation data to NeonCRM

When a person makes a text-initiated donation via a GivBee *Fundraising Message*, GivBee adds the data (*First Name, Last Name, Email, Mobile Number, Donation Amount*), to the individual's existing record in NeonCRM. If a matching record is not found, GivBee creates a new record for that individual.

NOTE: If you rely on a webpage hyperlink in a text message to capture donations (instead of using GivBee *Fundraising Message*), GivBee cannot pass donation data to NeonCRM. Instead, the webpage donation form must be connected to NeonCRM.

Have questions or need help connecting your NeonCRM account to your GivBee account?

Contact us here : Support@givbee.com.