

Exceed Beyond – Qgiv Integration

Overview

Qgiv is an on-line giving solution that allows you to create forms for your website to accept on-line donations, membership dues, and event registration. These can then be imported directly into Exceed Beyond without having to enter each name and transaction manually.

To learn more about the kinds of forms that you can create and other services offered by Qgiv, visit their website at <http://www.qgiv.com/>.

When you use the Qgiv Interface from within Exceed Beyond, you establish a direct link from Exceed Beyond to Qgiv. In this way the on-line transactions from the Qgiv forms can be transferred directly from Qgiv to Exceed Beyond. Before the information is stored in Exceed Beyond, you establish certain rules to ensure that the data is correctly transferred and appears as you wish to see it.

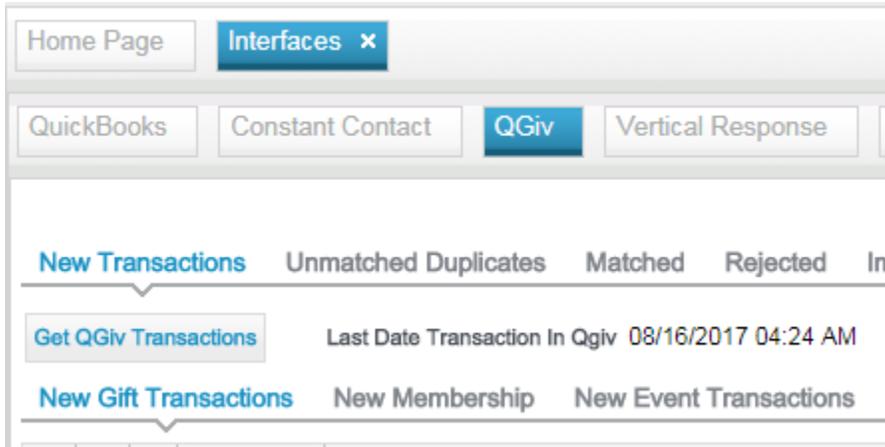
To use Qgiv to accept on-line donations and then import them into Exceed Beyond, do the following:

1. Sign up for an account with Qgiv. You can begin this process at their website.
2. Work with Qgiv to create a form or forms to add to your website.
3. Create a Qgiv API key within Qgiv's Settings Control Panel. Make sure you associate all the forms you want to interface with Exceed Beyond to the API key you create.*
4. Open the Qgiv Interface in Exceed Beyond and create a link to Qgiv by signing in and supplying the Qgiv API key. To sign in, select Sign In from the upper right corner of the Qgiv Interface tab. By supplying the Qgiv API key, you ensure that it is your data from your forms that gets passed from Qgiv into Exceed Beyond.
5. Within Exceed Beyond, for each form identify the Qgiv form type and set up mappings and defaults so that the information is imported correctly. See the Form Setup section below for more info.
6. Periodically visit the Qgiv Interface within Exceed Beyond to import new transactions that have come in through the Qgiv forms that you have set up. The Qgiv Interface is accessed through the Interfaces Navigator. When you select Interfaces from the Navigator, the Qgiv tab appears, along with the other interfaces.

*To find the Qgiv API key, log into your account in Qgiv. From the menu on the left margin, select Settings and then API Access. Copy the API key and paste it into the API Key field in the sign in Exceed Beyond.

Qgiv Interface

The Qgiv Interface tab can be found by clicking on the Interfaces button on the left-hand menu bar, then clicking on the Qgiv tab in the Interface screen that appears.

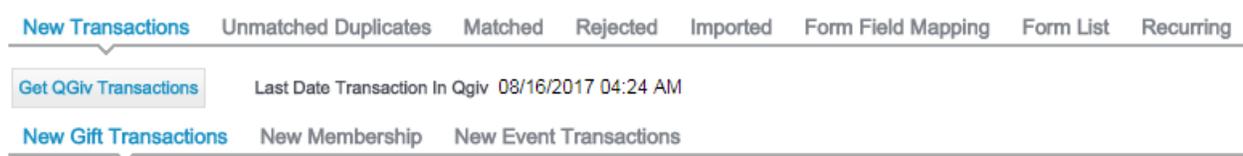


Use the Qgiv Interface tab to identify Qgiv forms that contain data to be imported into Exceed Beyond, to map fields from these forms and set defaults, and to import names, gifts and event registrations that have been processed through these Qgiv forms.

Names of donors who have entered information and processed donations through Qgiv forms may already exist in your Exceed Beyond data, or the donors may be completely new to your organization. The Qgiv Interface attempts to find matches for the names in Exceed Beyond. Since names may be entered in different ways, it is possible that a donor may already be in Exceed Beyond, but the Qgiv Interface is unable to make the match. You are given several options for deciding if a match exists or not.

Names without a match to an existing name in Exceed Beyond are imported as new names, and then the gift transaction is appended to the new bio record. Transactions for names that have a match are appended to the matching name in Exceed Beyond.

The Qgiv Interface Tab includes the following sub tabs:



- **New Transactions** - this lists the Qgiv transactions that have been downloaded but not yet been imported into Exceed Beyond. It also includes a button to download any additional pending transactions from Qgiv. From this tab you initiate the process to match imported names to existing names. You also import any names that have no matching record in Exceed Beyond.
- **Unmatched Duplicates** - this lists the transactions for which several possible matching names in Exceed Beyond have been identified. For each of these you need to select the name in Exceed Beyond that matches the name in the transaction.

- Matched - this lists the transactions for which a matched name in Exceed Beyond has been identified, either by the Qgiv Interface or by your own judgement. From this tab you import the transactions to be appended to existing records in Exceed Beyond.
- Rejected - this lists the transactions that you have chosen not to import.
- Processed - this lists the transactions that have been processed, that is, the gift has been added to Exceed Beyond.
- Form Field Mapping - this is a set up screen where, for each Qgiv form, you specify exactly how the information should appear in Exceed Beyond, including mapping fields and setting defaults.
- Form List - this lists all of the forms that you have created in Qgiv and asks you to identify the form's type for each form.

Form Setup & Mapping

There are several types of forms that you can create with Qgiv for accepting donations and event registrations on-line and then importing these into Exceed Beyond. You work with Qgiv to create these forms, using the fields that can be readily imported into the correct places in Exceed Beyond.

The form types available are:

- Campaign - use this form to accept donations for a specific campaign. Names imported from a Campaign type form are added to the prospect list within the Campaign Manager for the campaign. The gifts are added to each donor's giving history.
- Event - use this form for registering attendees at an event. Names imported from an Event type form are added to the RSVP list within the Event Manager for the event. If the registrant paid to attend, the gift is added to their giving history.
- Gift - use this form for accepting on-line donations, including gifts, recurring gifts, and pledges. Use the Membership type form for accepting dues.
- Membership - use this form to accept membership dues. Donations imported from a Membership type form create or update membership information for the people who use the form, including join and expiration dates and membership levels.

New Transactions Unmatched Duplicates Matched Rejected Imported Form Field Mapping **Form List**

Get QGiv Forms			
		Clear Filter	
Form ID	Form Name	Form Type	
Form ID	Form Name	Form Type	Edit
548935	2017 Event Form	Event	Edit
928228	Art Show Sales	Gift	Edit
928293	Arts Event Tickets	Gift	Edit

When you open the Form List tab of the Qgiv interface, a list of your organization's forms created by Qgiv appears. For each form, you need to assign a form type so that the information is correctly imported into Exceed Beyond from that form, as indicated by the form type.

If you do not see a list of your Qgiv forms, it may be that you have not signed in to your Qgiv account from Exceed Beyond, by supplying the Qgiv API key. Use the Sign In drop down in the upper right corner of the Qgiv tab to enter your Qgiv API Key and establish a link from Exceed Beyond to your account in Qgiv.

For each form in the list, do the following:

1. Click on the Edit link in the row of the form name.
2. Select the form type from the list.
3. Click on Save.

Each time you work with Qgiv to create a new form, return to this tab to enter the form type.

Once you have set the form types for each form, you are ready to create mappings and set defaults for each form. Mappings indicate exactly where each piece of data from the on-line form should appear in Exceed Beyond. For example, a form may include a field for designating a gift for a specific purpose. This field would normally map to the gift Fund code in Exceed Beyond.

When you are ready to create your mappings for a form, please contact the Arreva support team for assistance.

[New Transactions](#) [Unmatched Duplicates](#) [Matched](#) [Rejected](#) [Imported](#) [Form Field Mapping](#) [Form List](#)

The screenshot displays the 'Field Mapping' interface. At the top, there is a navigation bar with tabs: 'New Transactions', 'Unmatched Duplicates', 'Matched', 'Rejected', 'Imported', 'Form Field Mapping' (which is highlighted), and 'Form List'. Below the navigation bar, the 'Field Mapping' section is visible. It includes a 'Select QGiv Form' dropdown menu with 'Gift' selected and a 'Go' button. Below this, there are two side-by-side lists of fields. The left list is titled 'QGiv Fields' and contains: 'QGiv Fields', 'Associate Info', 'Billing Address', 'Billing City', 'Billing Country', 'Billing State', 'Billing Zip', 'Contact Company', 'Contact Country', and 'Custom Amount Name'. The right list is titled 'Exceed Fields' and contains: 'Exceed Fields', 'Address Country', 'Address County', 'Address Street Block 2', 'Approval Date', 'Approved', 'Associated Information', 'Billing Address City', 'Billing Address Country', and 'Billing Address State'. Both lists have a 'Clear Filter' button and a 'Save' button.

Importing Qgiv Data

When transactions come from Qgiv, there are generally three possibilities for each transaction:

- There is matching name already in Exceed Beyond. The transaction is appended to this name.
- There is no matching name in Exceed Beyond. A new household or organization is added and the transaction is appended to the new name.
- The transaction is rejected and nothing is added to Exceed Beyond.

To import transactions from Qgiv, do the following steps:

1. Make sure you have set all of your field mappings and default values for all of your active Qgiv forms.
2. Open the New Transactions tab of the Qgiv Interface tab. There may be a list of transactions on this tab. These are the transactions that have not yet been imported into Exceed Beyond.

Record #	Record ID	Person1 First Name	Person1 Last Name	Person2 First Name
0	533	John Wayne	Macy	Person2 First Name

3. Click on the Get Qgiv Transactions button to add any new transactions that have been processed through your Qgiv forms. New transactions appear in the list. If you have more than one form, you may see transactions from different forms in this list. The Form Name column indicates which form a transaction came from.
4. Select the transactions you do not wish to import by checking the boxes in each row. Click on the Reject button to move these to the Rejected list. These are usually transactions that have a failed transaction status. You might also wish to reject a transaction based on some other criteria, such as having a name and address that are indecipherable.

New Gift Transactions New Membership New Event Transactions

Currently Sorting: .hold SHIFT Key for multiple sort

Filtered Columns

<input type="checkbox"/>	Record #	Record ID	Person1 First Name	Person1 Last Name
<input checked="" type="checkbox"/>	Record #	Record ID	Person1 First Name	Person1 Last Name
<input checked="" type="checkbox"/>	0	533	John Wayne	Macy
<input checked="" type="checkbox"/>	0	534	sen	stee
<input checked="" type="checkbox"/>	0	535	Chris	Fink
<input type="checkbox"/>	0	536	Sean	Steele

- Select the transactions you wish to bring into Exceed Beyond by clicking on the check boxes in each row. Generally you would select all transactions in the list by clicking on the check box in the header of the list.
- Click on the Automatic Match button to initiate the search to check each name and address against the existing names in Exceed Beyond.

There are three possible outcomes for each name:

- There is a match for the name. The transaction is moved to the list on the Matched tab.
 - There is a partial match or more than one potential match for the name. The transaction is moved to the list on the Unmatched Duplicates tab.
 - There is no match for the name. The name remains in the list on the New Transactions tab.
- The Interface uses the following matching logic:

Are you sure?

	<p>Matching Criteria For Household</p> <p>By Email</p> <p>Person 1: By First Name, Last Name and Zip</p> <p>Person 1: By First Name, Last Name, Street Block and Zip</p> <p>Person 1: By First Name, Last Name and Email</p> <p>Person 1: By First Name, Last Name and Phone</p> <p>By First Name and First 5 Character of Street Block</p> <p>By First Name, Last Name, Street, Zip and Blank</p>	<p>Matching Criteria For Organization</p> <p>By Email</p> <p>By Entity Preferred Name and Zip</p> <p>By Entity Preferred Name, Street Block and Zip</p> <p>By Entity Preferred Name and Email</p> <p>By Entity Preferred Name and Phone</p> <p>By Entity Preferred Name and First 5 Character of Street Block</p>
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- Scroll through the unmatched names that remain on the New Transactions tab. If you suspect that a name is in your Exceed Beyond list, you can choose to look them up to verify and then match them. Use the Search button to look up a name. If you find a match, select it from the search results. The transaction for that name is moved from the New Transactions tab to the Matched tab list.

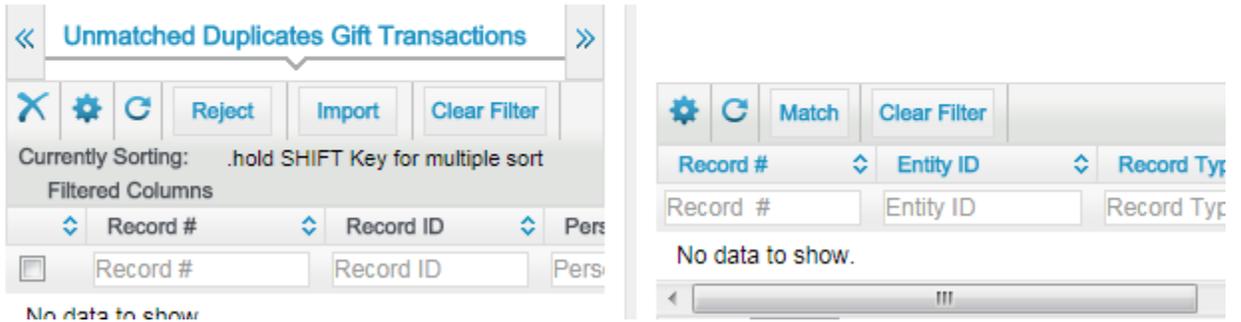
- Select all the transactions in the New Transactions list that are ready to be imported as new households or organizations and click on Import.

A new household or organization is created for each name in the New Transactions list. The transaction gift is appended to the new name. These transactions are moved to the Imported tab.

- Open the Unmatched Duplicates tab to review the list of transactions where you need to determine if an existing name matches the transaction name.



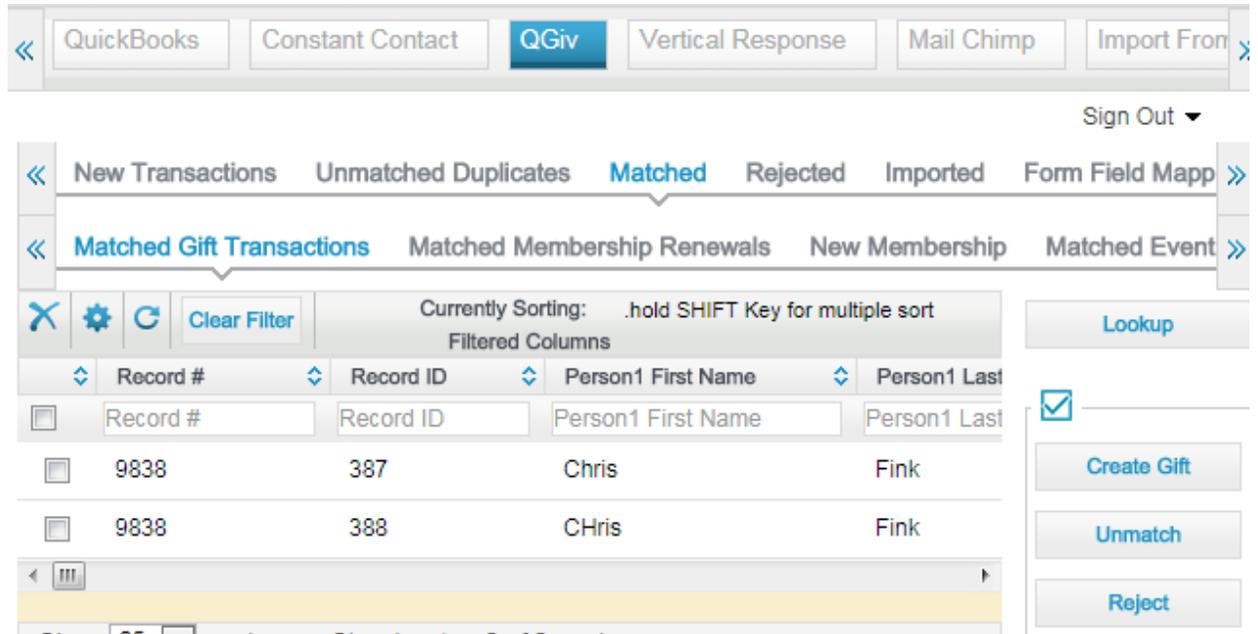
Highlight an entry on the left side and potential matches will appear on the right.



- Select an unmatched name in the list on the left. The potential duplicate names in Exceed Beyond for that name are displayed in the grid on the right. Select the correct name and click on the Match button at the top of the grid. The transaction is moved to the list on the Matched tab.

- Repeat the above process for each unmatched name.

- Open the Matched tab to view a list of all of the transactions that are ready to be appended to existing names in Exceed Beyond.



13. If there are transactions that should be rejected or moved back to the New Transactions list rather than being imported, select those transactions and click on Reject or Unmatch.
14. Select the transactions to be imported and click on Create Gift.
15. The list of all rejected transactions can be viewed on the Rejected tab.
16. The list of all imported transactions can be viewed on the Imported tab.