

Objective: Description of the BCRM-Qgiv Integration and step-by-step instructions to integrate BCRM with Qgiv.

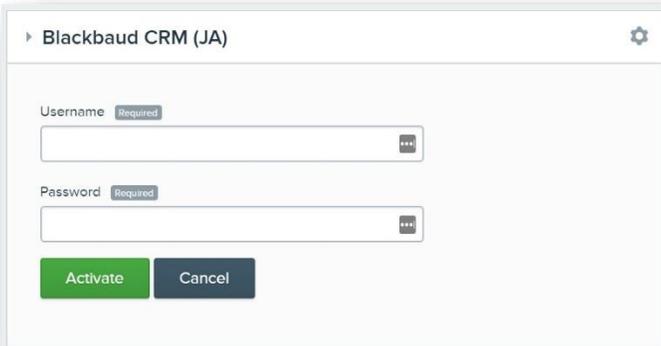
Prerequisites: BCRM-Qgiv Agreement submitted by the JA Area President. (Agreement located [here.](#)) Login credentials will be sent to the JA Area President after the BCRM-Qgiv Agreement is received.

Configuration

🟢 Online transactions, Qgiv offline transactions, and peer-to-peer offline verified transactions (including matching) are exported by default. You have the option to toggle off the export of offline and matching donations. Refunds, voids, and chargebacks are not exported.

To turn on the integration:

1. Click **Reporting**, then click **Service Integrations**
2. Select the cogwheel to open the configuration options
3. Enter your BCRM Username and Password (sent to your JA Area President)
4. Click the **Activate** button



Blackbaud CRM (JA)

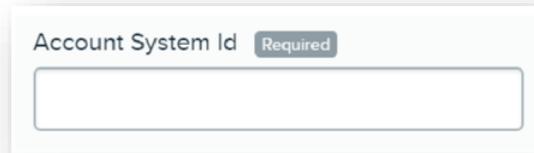
Username Required

Password Required

Activate Cancel

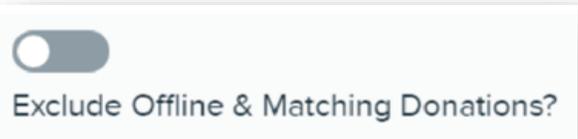
5. Select **Continuous** from the **Frequency** drop-down
6. Set the value of the **Export Date Starting On** equal to when the Qgiv exports should begin (View information in the Exports section for additional information)

7. Enter the ID obtained from Junior Achievement USA in the **Account System Id** field



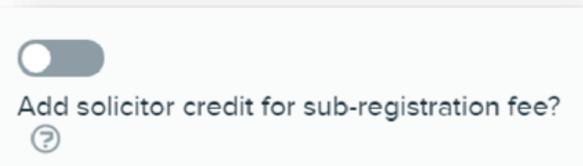
Account System Id Required

8. Use the **Exclude Offline & Matching Donations?** switch to toggle between wanting information exported offline and matching donations



Exclude Offline & Matching Donations?

9. Use the **Add solicitor for sub-registration fee?** to give sub-registrants a solicitor credit for their registration fee

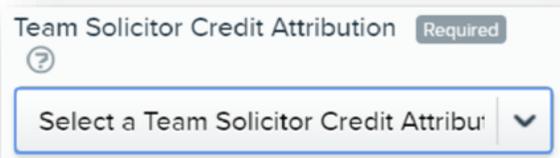


Add solicitor credit for sub-registration fee?

10. The **Do not acknowledge** switch is on by default to ensure the corresponding BCRM payment record field is the same
11. The **Do not receipt** switch is on by default to ensure the corresponding Blackbaud CRM payment record field is the same



12. Use the **Select a Team Solicitor Credit Attribution** drop-down to choose how donations to teams should be attributed:
 - a. **Team Captains** will distribute donations across team captains

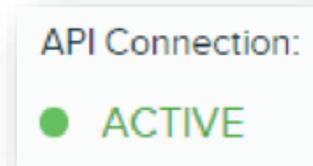


- b. **Evenly Distributed** will spread donations across all team members
13. Use the **Maximum Transactions** drop-down to set the amount of transactions Qgiv will send per export
 - a. The default value is 100
14. Set the default designation using the **Designation** drop-down
15. Set the default appeal using the **Appeal** drop-down
 - a. Appeals are optional
 - b. If you do not want an appeal set the value to **Unmapped**
16. Extra information can be added to the **Payment Reference BCRM** field (optional).
 - a. You can make multiple selections. They will appear one at a time below the drop-down
 - b. Not all information is available (Example: Participant Name will ONLY display for peer-to-peer registrations)



Connection Information

1. The **Connection Details** allows you to view which environment your data is being sent to (BCRM Stage or BCRM Production)
2. The **API Connection** shows the status of your API
3. After your default settings have been saved your API Connection status will change to Active



4. Click the **Re-authenticate** button to re-authenticate the integration connection without having to delete and reinstall the integration
5. After you have configured your settings, click **Save**.
6. You will need to click **Save** even if you have not made any changes
7. You may also choose to **Cancel** your actions
8. If you would like to **Delete** your integration, click the trash icon

Optional Mappings

1. Click the arrows to expand the **Optional Mappings**
2. Use this section to modify specific data sets
3. Click a specific type to export
4. In the **Qgiv Data** drop-down select the form from which you would like to export data
5. Select if you want the values **mapped** or **excluded** using the **Blackbaud CRM (JA) Data** drop-down
6. Additional fields will display
7. Click **Save** to save your changes
8. Associated fields:
 - a. Qgiv Data
 - i. Designation
 - ii. Appeal
 - b. Restriction
 - i. Restriction
 - ii. Sub-restriction
 - c. Event
 - i. Event
 - ii. Event Package (optional)
 - d. Peer-to-Peer Classification
 - e. Peer-to-Peer Category
 - f. Peer-to-Peer Restriction
 - g. Peer-to-Peer Store
 - i. Peer-to-Peer Store Category
 - ii. Peer-to-Peer Store Product (optional)

Exports

1. Please note: The date you set aligns with the transaction dates you can export
2. Setting the date to today and choosing the continuous option will ONLY send transactions from today and future dates
3. If you need to export historical data, you will need to set the calendar accordingly and run a manual export before setting the continuous option
4. You will receive a pop-up message alerting you that your export was complete

Export History

1. Errors/Issues that occur during the export can be viewed using the **View Export History**
2. View the **Export History** located to the right of your settings



3. The export history will display the most recent 10 entries
4. Click **View All Export History**
5. Here you will see a detailed table with an overview of the transactions that exported, along with a count of successful, failed, and in progress items
6. A green dot signifies that the export was successful
7. A gray dot signifies that the export was unsuccessful
8. An orange dot signifies that there were errors in the export
9. Click **View Details** to see the exported transactions
10. The **Exported Transactions** page will display with a list of exported transactions, the transaction ID, date, name and email of the person making the transaction, payment method, amount, and status

	ID	Date	Service	Successful	Failed	In Progress
View Details	439	08/19/2018	Blackbaud CRM (JA)	2	0	0
View Details	438	08/19/2018	Blackbaud CRM (JA)	4	0	0

EXPORTED TRANSACTIONS						
ID	Date	Name	Email	Method	Amount	Status
375253	08/19/2018	Carlos Perez	carlosperez@example.com	Visa	\$99.00	✓
375252	08/19/2018	Mary Sinclair	msinclair@example.com	Visa	\$50.00	✓

11. Specific transactions with a red X mean they were not exported
12. Click the eye icon to display error information associated with the transaction
13. Items with a person icon associated with them signify that a new constituent record was created in BCRM



Export Error

If the error relates to an email address and/or is something that can be fixed, you may do so by:

1. Click the **Transaction ID** and make the necessary change.
2. Click the red X icon to remove the transaction from the table
3. Make the appropriate changes to the associated record
4. When the next export runs the transaction will go again