



Connect The Giving Block to NeonCRM

The Giving Block + NeonCRM integration will allow you to seamlessly sync The Giving Block donations with your Neon CRM, meaning you will no longer have to manually upload data.

Key Neon CRM Links

We will do our best to provide simple, step by step instructions in this guide. If you need more information on how NeonCRM works, please check the following:

- [Neon CRM Developer Guide](#)
 - [Neon CRM Knowledge Base](#)
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How to Setup the Integration

You will need to go through the following process to setup the integration:

1. **Create a new user account on NeonCRM**

Create a new user using the [instructions provided by NeonCRM here](#).

- We recommend that you create a user named "The Giving Block", this will make it easy to identify
- The user must have "user" level of permissions

2. **Generate an API token for the new user**

API Keys are based on NeonCRM system user accounts. We recommend creating a new user account for each integration you enable. This makes it easier to disable a single integration at a later time. If you disable a user account with API access, all applications that depend on the account's API key will stop working.

- Log in to your NeonCRM system. Navigate to: Settings cog > User Management.
- Click New User. You can name this user anything you like, but we recommend naming the user something that distinguishes its use, such as API User.
- Enable the API access for this user account. Click the toggle to enable. This will display your API Key. Copy this key.
- Click Create User to complete the process of creating this user.
- Your user will now appear in the User Management list. Remember, disabling this system user will terminate NeonCRM API access.

[You can find more detailed instructions with images here](#)

3. Finding your organizations "organization id"

- In NeonCRM navigate to: Settings cog > Organization Profile & Billing.
- Scroll down to the "Database Information" section. Your Organization ID will be displayed here.

[You can find more detailed instructions with images here.](#)

4. Add Neon CRM API Key and Organization ID to TGB Dashboard

Email us at integrations@thegivingblock.com with your API Key and Organization ID and we will finalize your integration access within TGB's dashboard.

How to Use The Integration

Once you've successfully implemented The Giving Block/NeonCRM integration, any donations through The Giving Block will flow directly into Neon CRM. If there's an existing record, it will match up those donations right onto the record. If it's a new record, it will create a new record. If it's an anonymous donor, it will create an anonymous type record for your reference.

When a donor gives cryptocurrency through The Giving Block's widget, this will create a new donor in NeonCRM using the donors 'Firstname', 'Lastname' and 'Email'. If the address is able to validate these will be added to the donor information.

A Donor Account will be created with the following data:

A Donation Record will be created with the following data:

- Donation Summary / Donation Info / Anonymous: (Yes/No)
- Donation Summary / Donation Info / Amount: Shows the \$USD amount of the cryptocurrency donation after it is converted to cash (Less TGB fees)
- Donation Summary / Donation Info / Donor Name (Will display as "Anonymous Donor" if Anonymous = Yes)
- Donation Summary / Donation Info / Date
- Donation Summary / Donation Info / Tender: Will always show as "Other" if it is cryptocurrency for MVP
- Donation Summary / Donation Info / Cryptocurrency Amount: Will show the amount of cryptocurrency (not the dollar value, just like stocks)
- Donation Summary / Donation Info / Cryptocurrency Ticker: Will show the ticker of the crypto (i.e. BTC, ETH, ZEC etc)
- Donation Summary / Donation Info / Cryptocurrency Exchange Rate: Will show the rate in \$USD at the time the cryptocurrency is converted to cash (NOT the time that it is donated)
- Donation Summary / Donor Information / Donor Name
- Donation Summary / Donor Information / Address Line 1
- Donation Summary / Donor Information / City

- Donation Summary / Donor Information / Zip
- Donation Summary / Donor Information / Email
- Donation Summary / Donor Information / Country

Preventing Duplicate Data

We are currently working to mitigate duplicated accounts by preloading via First name, Last name and Email fields (if those are submitted in The Giving Block widget i.e. not an anonymous donation) from the NeonCRM first before sending it.

To find out how to discover duplicates, convert and delete accounts, please refer to [this article in the NeonCRM knowledge base](#)