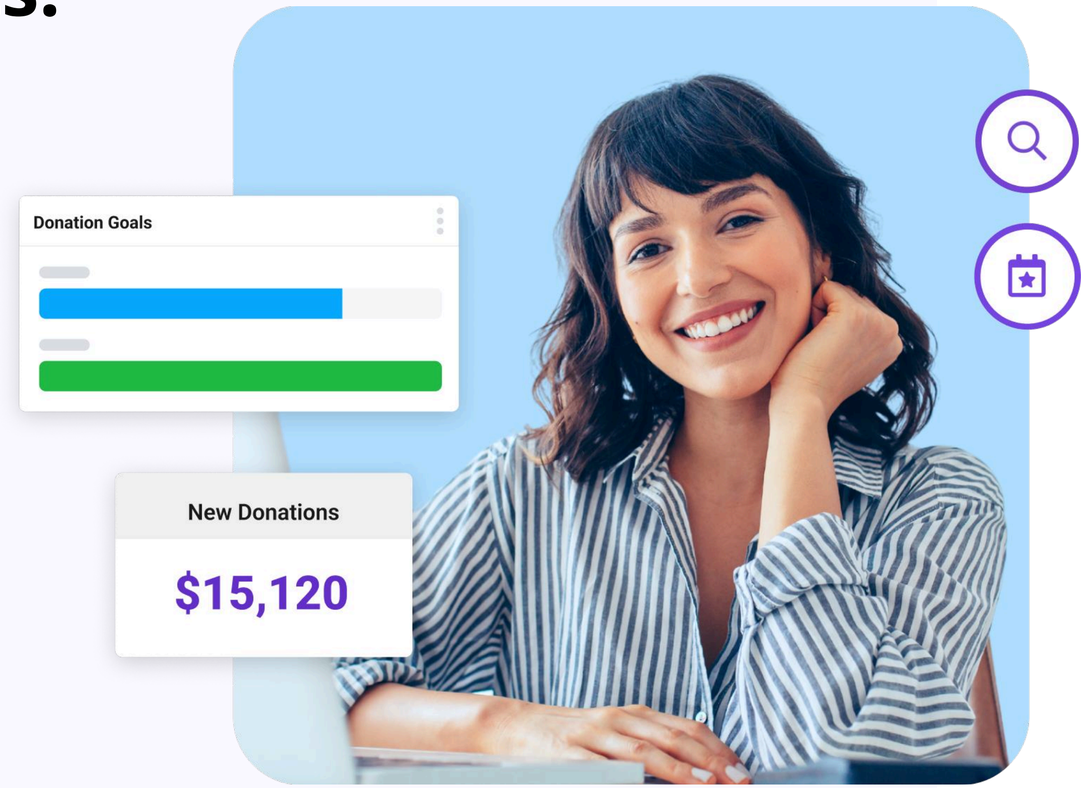
keela + Raisely

# Integration Overview

Connect your Keela and Raisely workflows to unlock the full potential of your campaign and donor data.



# It’s time to integrate Keela and Raisely to supercharge your donor engagement efforts.




## Here’s why you’ll love using Keela and Raisely together:

### ✅ Manage the full donor lifecycle

Create beautiful fundraising campaigns in Raisely and then sync those campaigns to Keela to keep the momentum going by **continually engaging** with your donors.

### ✅ Avoid donor data entry errors

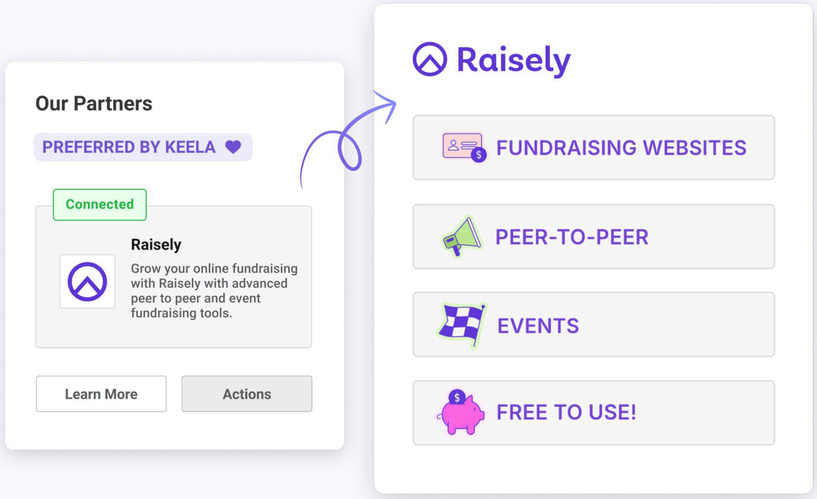
Integrating your donor CRM and your online fundraising platform ensures that everyone in your nonprofit is working from the same, **synchronized data** so your campaign details are accurate.

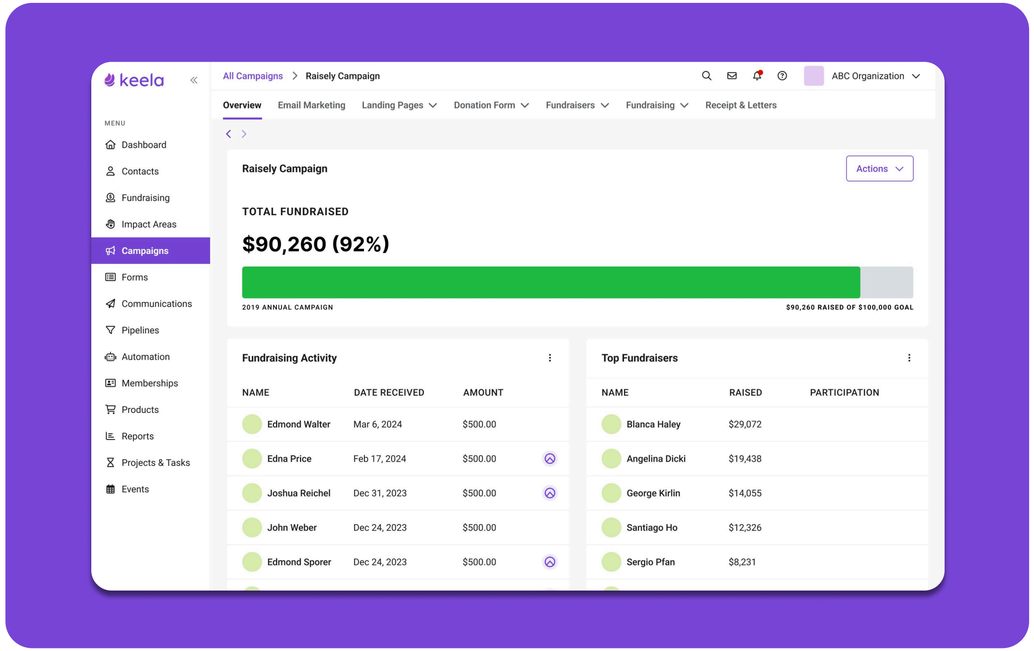
### ✅ Improve campaign personalization

When your Raisely fundraising campaigns and Keela donor management efforts are closely aligned, you’ll discover new opportunities for personalization and **deepening donor relationships** for greater giving.

# Want better visibility across your fundraising campaigns?

Sync Keela's donor management platform with Raisely's digital fundraising solution to gain a holistic picture of campaign performance and donor activity. 🎉




⭐ **Sync donor contact details**

⭐ **Automate transaction updates**

⭐ **Match campaigns to donors**

⭐ **Centralize campaign & donor management**

# How the integration works...

## Campaign Data

**Create or edit a Campaign in Raisely**

Campaign appears in Keela including:

- Fundraising Goal
- Created Date
- Source

## Transaction Data

**Add or edit Transaction details in Raisely**

Added or edited Transaction details sync to Keela:

- Contact Name
- Date Received
- Transaction Item Type
- Transaction Item Amount

## Contact Data

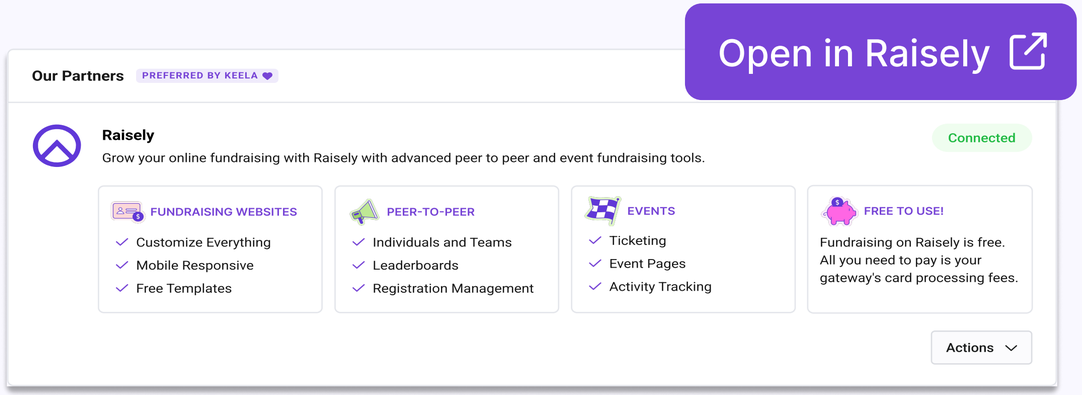
**Add or edit Contact details in Raisely**

Added or edited Contact details sync to Keela:

- Full Name
- Primary Email & Phone
- Created Date

# How to set up and manage the Keela + Raisely Integration

This integration is a one-way sync of data from Raisely into Keela. Once you've completed the initial sync, any new data added to Raisely will automatically update in your Keela account. 🙌




## Getting Started

1. In your Keela account, click on your Profile in the top right hand corner. Navigate to **Organization Settings > Integrations**.
2. On the Integrations screen, you'll see Raisely listed at the top under Our Partners.
3. Click **Connect** and follow the prompts to link your Raisely account or set up a new Raisely account.
4. Choose how you'd like the sync to handle duplicate contacts.
5. That's it! Your sync will automatically begin and you will see a "connected" label confirming the integration is active.

## Managing the Integration

1. To import data that was added to Raisely prior to your sync, you must complete a **manual import**.
2. Once the sync has been activated, any Campaign, Contact, and Transaction data in Raisely will be sent into your Keela account.
3. Keep in mind that this is a one-way sync. Edits made in Raisely will update in Keela, but any edits made in Keela will NOT update in Raisely.
4. Within a Transaction or Campaign in Keela, you can click the **Open in Raisely** button to easily edit details in Raisely as needed.

# Frequently Asked Questions

**In Keela, we break down transactions between Revenue or Donation for tax purposes. Will this breakdown be visible for transactions that we import from Raisely?**

*Yes! Raisely Transactions will sync in Keela to their relevant transaction types. For example, fully tax deductible items will be listed as a Donation and non-tax deducible items like Tickets will be listed as Revenues in Keela.*

**When I'm looking at the Transaction table in Keela, it looks like I have a single transaction in Raisely that is appearing as multiple transactions in Keela. Why is this happening?**

*In Keela Transaction tables, transactions are listed by line item rather than by parent details. For a Raisely transaction that has multiple purchases within a single transaction, you will see each purchase broken out by line item in the Keela table. If you click into the line item, you will be able to see that it is part of one, single transaction.*

**I activated the integration, but I am not seeing my Raisely data in Keela. Why?**

*Historical data in Raisely will not be brought into Keela. In order to see Raisely data from before the systems were connected, you must import your data. If you are still having issues viewing Raisely data in Keela, please reach out to our Support Team!*

**What happens in Keela if I process a refund in Raisely?**

*Any refund that is processed in Raisely will sync to Keela by updating to show a $0 amount in Keela and a note that a refund was processed.*

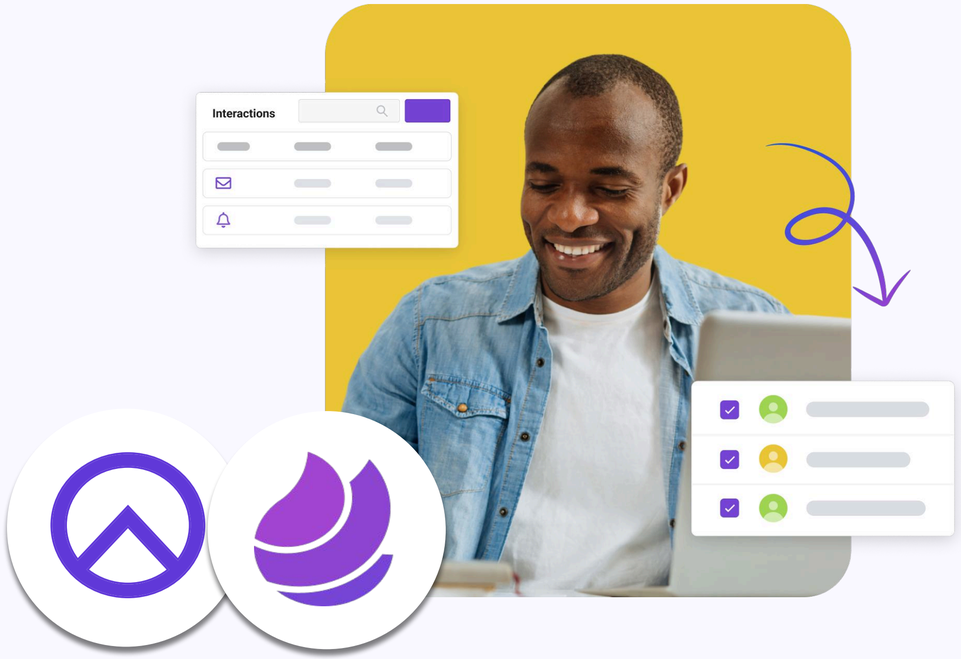
**How do I create a receipt in Keela for my Raisely transactions?**

*Receipts for Raisely transactions can only be generated within Raisely. At this time, you cannot generate a receipt in Keela for transactions processed through Raisely. You can update transactions in Keela to include partial advantages or tax-deductible amounts. However, these changes will not be reflected on receipts or within Raisely.*
*Note: While Raisely does offer tax-eligible receipts, it currently does not support partial tax deductibility for tickets.*

**I receive donations in Raisely for multiple currency types. How will those other currencies sync to Keela?**

*At this time, Keela does not support a global currency sync. If you receive a donation in a currency that is different than your default currency setting in Keela, the amount that syncs from Raisely into Keela will show as the amount of your currency setting in Keela. We are aware that this is a limitation, and we are quickly working on a fix. In the interim, we recommend that you toggle "off" Global Currencies in Raisely.*

# A loyal and engaged donor base is the key to advancing your mission and creating lasting impact.




Get started with Keela and Raisely today!