Anedot to Crimson Integration Setup

Integrate your **Anedot Campaigns** directly with **Crimson** to push your real time online fundraising data directly into your organization's Crimson database.

To get started, you must first create an Anedot account. Once the account has been established, you will need to take the following steps to complete your Anedot account integration with Crimson:

1. Locate and copy the Anedot API Token.
2. Create the corresponding Crimson API Token.
3. Link the Crimson API Token to the Anedot Campaign.

NOTE: A unique API integration must be established for each unique organization in Crimson (Ex: One for the Candidate Campaign's Fund Codes, and another for a PAC's Fund Code sharing a database).

Locate and copy the Anedot API Token

First, you will need to provide Crimson with your unique **Anedot**

API Token to validate your Anedot account settings. Follow the directions below to locate the token in Anedot.

1. Log into Anedot.
2. On the left side of the home Dashboard click on the **Email, Login, and Security** menu.
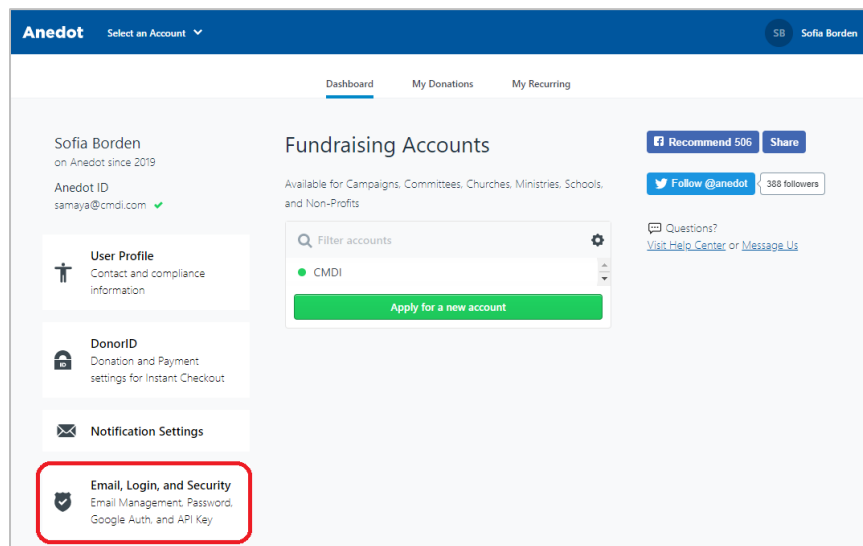
3. Scroll down until you see API Token. Then click the Show Token button.
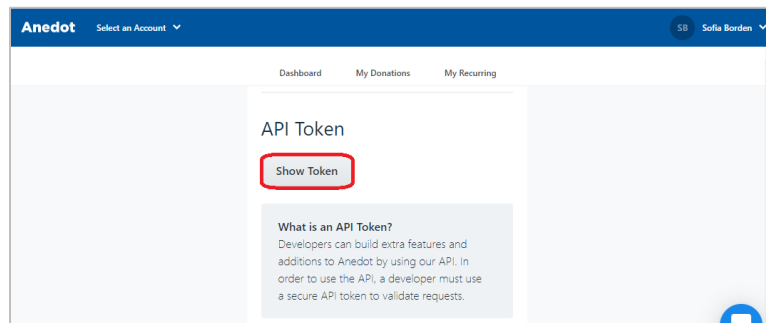
4. The API Token will appear. **Copy** the full Token that appears on the screen and use it in the next step "**Create the corresponding Crimson API Token**".
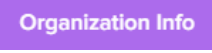
Create the corresponding Crimson API Token

Next, create a corresponding Crimson API Token for each organization's Fund Code that has a unique Anedot Account to have the Anedot campaigns' results push into Crimson under that Fund Code.

NOTE: Only Crimson **Project Admin** users can enable these settings.

1. Log into Crimson.
2. Click on the [icon] **My Account** dropdown located in the top right corner of Crimson and select the **Account** settings option.
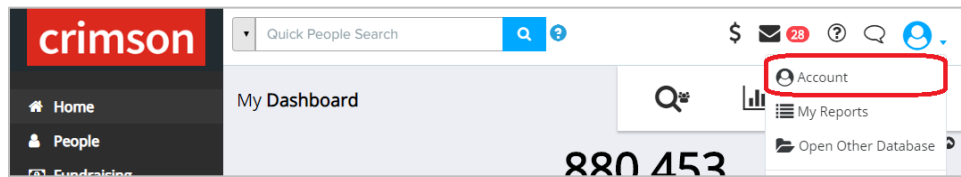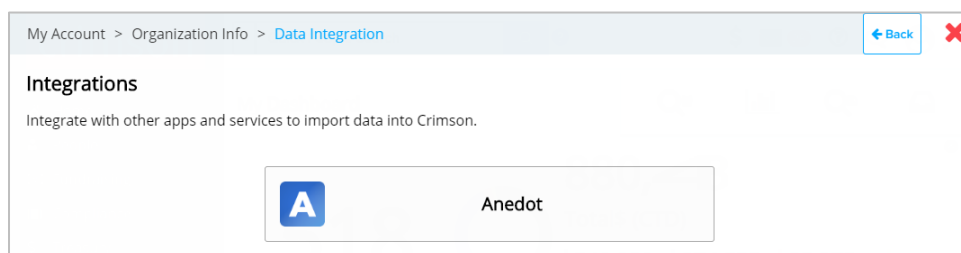

3. Click on the **Organization Info** button that appears in the top right corner of the new window.
4. The Organization Info will appear. Click on **Data Integration** at the footer of the screen.
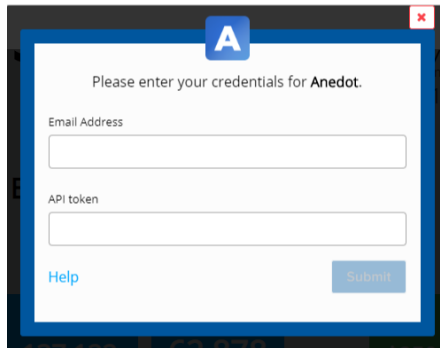

5. Click on the **Anedot** button.

6. Click **+ Add New Integration** to stare a new integration for a specific Fund Code.

- • **NOTE**: To edit an existing integration, click the name of the integration you wish to edit.
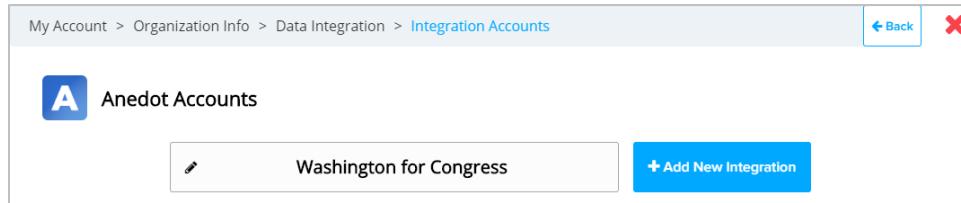
7. Enter the **Email Address** associated with your Anedot user account. Then enter the Anedot **API token** copied and saved earlier in step 1.

- • If you have a more than one organization account associated with your user account, a list of accounts will appear. Select the correct one for integration setup.

8. The Campaign Name will appear as a button. Click on the name to complete the setup.
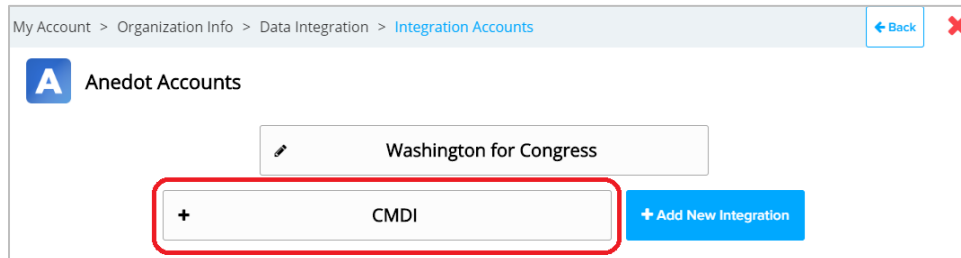
Edit Integration for Washington for Congress

Token

Y2M5ZGQ0OTUtMDY2My00ZTJmLTkyMmMtOTUzZDNhYjkyZTc4

Fund Code

C - PAC

Default Source Code

ANEDOT - Anedot

Default Batch #

ANDT

Default Channel

Web

Default Account Code

506 - Operating Account

Default Payment Type

AN - Anedot

Time Zone

(GMT -04:00) Eastern Standard Time

✕ Delete　　　　　　　　　　　　　　　　　　　**Cancel**　**Submit**

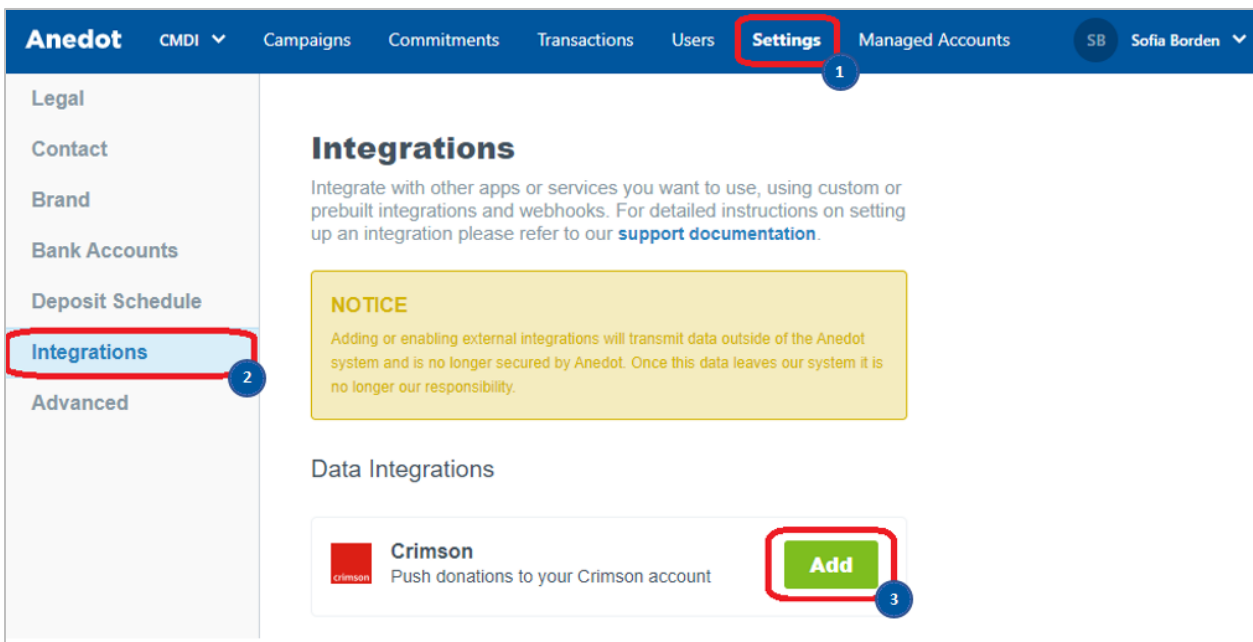9. Complete the fields on the screen. **Fund Code** must be assigned before clicking **Submit**.

- **Token** – Not editable. Click [icon] to copy the Token.
- **Fund Code** – Select the fund code related the Campaign integration being setup.
- **Default Source Code** – Select the Source Code to be applied to all gifts pushed through this integration. By default, the "ANEDOT" Source Code will be selected.
  - o **NOTE:** Source Code must already exist in **Fundraising Settings**.
- **Default Channel** – Select the Channel to be applied to all gifts pushed through this integration. By default, the "Web" Channel will be selected.
- **Default Account Code** – Select the bank Account to be applied to all gifts pushed through this integration (optional).
- **Default Payment Type** – Select the Payment Type to be applied to all gifts pushed through this integration. By default, the "AN - Anedot" payment type will be selected.
- **Time Zone** – All Anedot transactions are time stamped and passed to Crimson in **Coordinated Universal Time** (UTC) time. The Anedot integration **Time Zone** setting tells Crimson what to convert the transaction date/time stamp to which will determine the **Batch Date** of the transaction in Crimson.
  - o **NOTE 1**: By default, the Time Zone will be set to **Eastern Standard Time** (EST). To change the default, use the dropdown to select a different time zone before clicking **Submit**.

> o **NOTE 2:** Transactions internally processed in Anedot or Crimson will use the Date selected on the internal form during data entry rather than the date of processing.

10. Click [icon] at the top to copy the Token and get ready to add it to your Anedot account settings.
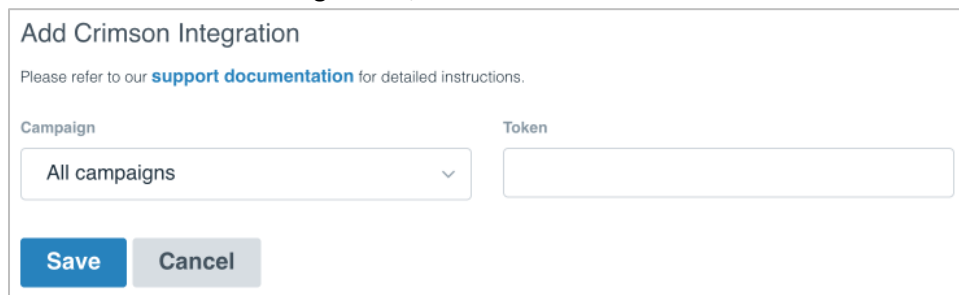
11. Click **Submit** when done.

Link the Crimson API Token to the Anedot Campaign

The final step in the integration process is adding the Crimson API Token to your Anedot Integrations settings.

1. Return to your Anedot account.
2. Select the **Account** for Integration setup (Ex: "CMDI" is selected above).
3. Click on the **Settings** menu option at the top.
4. Click on the **Integrations** option that then appears to the left.
5. Look for **Crimson** under Data Integrations, then click **Add**.

6. Add the CMDI API Token and click **Save** when done.

Integration Setup Complete

You have now successfully completed the integration. In the current version of the Crimson integration, the successful setup should result in a new webhook being added to your account.

- o To confirm setup was successful, click **Send Test Payload**. Anedot will provide a confirmation message on the page confirming.
- o To disconnect the integration, you can **Delete** the Crimson webhook in your Anedot integration setting.