Anedot to Julep Integration Setup

Integrate your **Anedot Campaigns** directly with **Julep** to push your real time online fundraising data directly into your organization's Julep database.
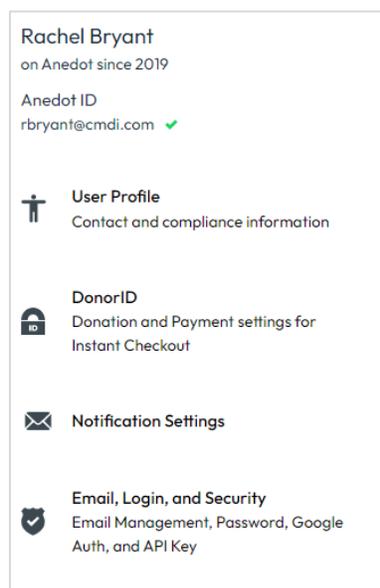
To get started, you must first create an Anedot account. Once the account has been established, you will need to take the following steps to complete your Anedot account integration with Julep:

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

Locate and copy the Anedot API Token

First, you will need to provide Julep 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.**

Rachel Bryant
on Anedot since 2019

Anedot ID
rbryant@cmdi.com ✔

User Profile
Contact and compliance information

DonorID
Donation and Payment settings for
Instant Checkout

Notification Settings

Email, Login, and Security
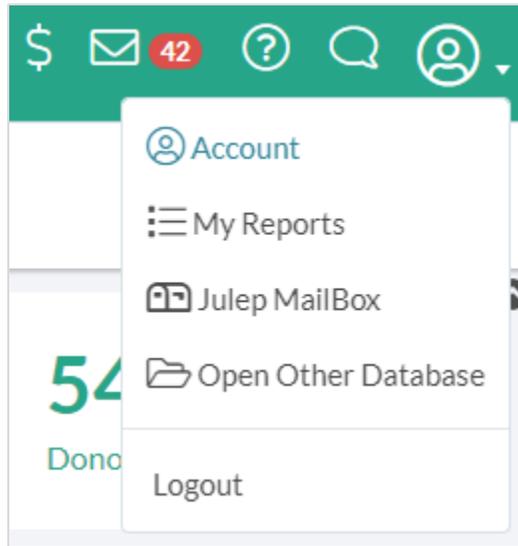Email Management, Password, Google
Auth, and API Key

3. Scroll down until you see API Token. Then click **Show Token** the 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 Julep API Token

Next, create a corresponding Julep API Token for each organization's Fund Code that has a unique Anedot Account to have the Anedot campaigns' results push into Juelp under that Fund Code.
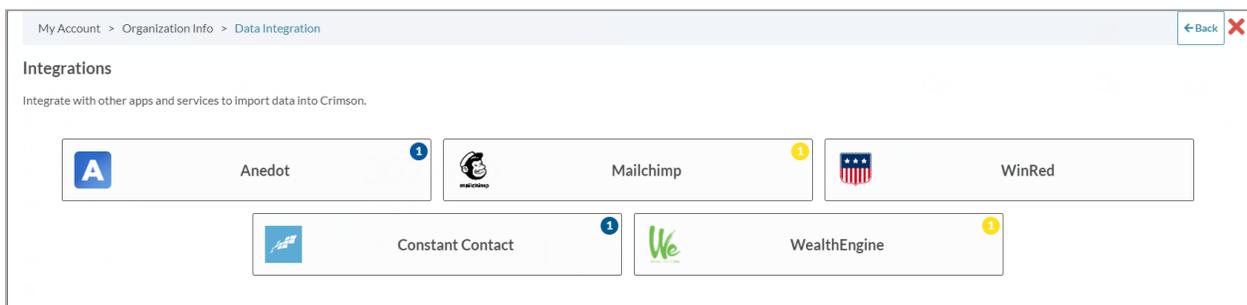
NOTE: Only Julep **Project Admin** users can enable these settings.

1. Log into Julep.

2. Click on the **My Account** drop down located in the top right corner of Julep and select the **Account** settings option.

3. Click on the **Organization Info** button that appears in the top right corner of the window.

4. The Organization Information will appear. Click on the **Data Integration** at the footer of the screen.

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

6. Click **+ Add New Integration** to start 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 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 Simms Foundation

Token

MjA2NjI4NTYtMTZhZC00MGEwLWEwNzQtMGQxNDU3ZDQ4NWFh

Account Name

Simms Foundation

Fund Code

MEM - Membership Fund

Default Source Code

ANEDOT

Default Batch #

ANDT

Default Channel

Web

Default Account Code

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 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.
  - **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 Julep in **Coordinated Universal Time** (UTC) time. The Anedot integration **Time Zone** setting tells Julep what to convert the transaction date/time stamp to which will determine the **Batch Date** of the transaction in Julep.
  - 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 Julep will use the Date selected on the internal form during data entry rather than the date of processing.

10. Click at the top to copy the Token and get ready to add it to your Anedot account settings.

11. Click when done.

Link the Julep API Token to the Anedot Campaign

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

1. Return to your Anedot account.
2. Select the **Account** for Integration setup.
3. Click on the **Settings** menu option at the top.
4. Click on the **Integrations** tab option.
5. Look for **Julep**, then click .
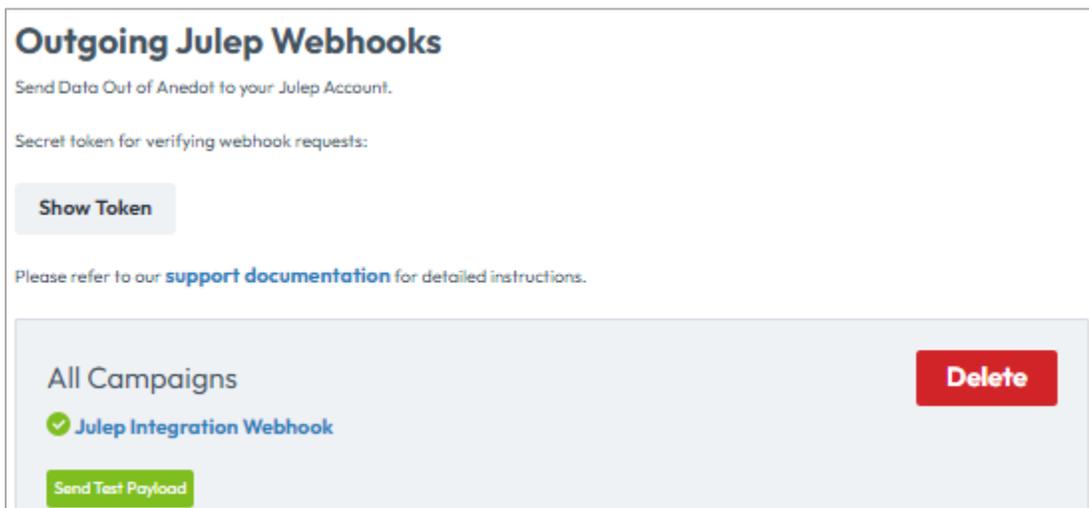
6. Add the Julep API Token and click **Save** when done.

NOTE: You will need to add an integration for both Anedot Campaigns and Action pages if you are utilizing both page types to process transactions.

Integration Setup Complete

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

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