DonorSnap
Donor Management Made Easy

DonorSnap Quick-Start Guide

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Quick-Start Guide, February 2020

DonorSnap Set-up Checklist

Welcome to DonorSnap! To help you get started with your new database, here is a checklist:

- ☐ Set up all your DonorSnap **Users** and their **Rights** to the database and feature menus. **Maintenance > Site-Setup > User Setup**
- ☐ Once logged in as Your User, customize your Dashboard Apps
- ☐ Create your Thank You letters in Word and upload in to the program
- ☐ Set up your integration with Quickbooks (either QB Desktop or QB Online).QB Desktop Guide
  QB Online Guide
- ☐ Create your account with **GoEMerchant** to take online donations.
- ☐ Edit drop-downs for **BLACK** DonorSnap fields (Attributes, DonationType, Appeal, Accounting Code, etc.) under **Maintenance > Site-Setup > Field & Screen Customization > DonorSnap Site Lookups**
- ☐ Add additional **BLUE** fields to the program (Volunteer Interests, Skills, MaidenName, etc.) under **Maintenance > Site-Setup > Field & Screen Customization > User-Defined Controls**
- ☐ Add your Organization Contacts (where you assign an individual contact to a Board member or Key Staff member) under **Community > Organization Contact**
- ☐ Set your System date. Go to **Maintenance > Site-Setup > Additional Site-Options**. At the bottom click the button for **Change Options** and enter your End of Year date in the field
- ☐ Run a Duplicates report. **Reports > Administrative Reports > Duplicates Reports** to see what duplicates you may have in the system. Run a variety of the different reports, print them out, and go research.

DonorSnap is an online data-management system, used to track donors and donations, volunteers and hours, prospects, community members, etc.

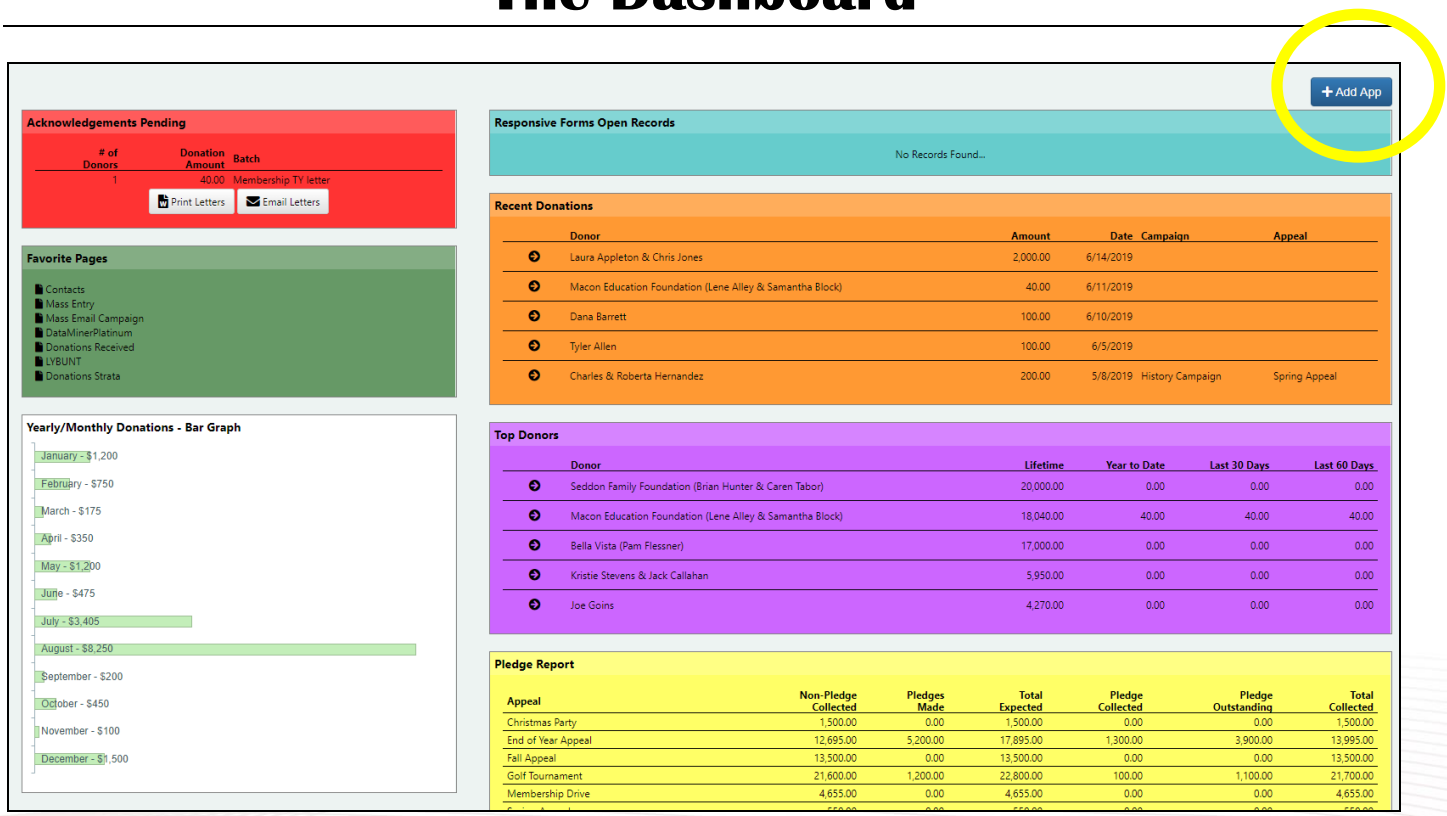
Web-based means it is accessible from any computer, home or work, simply by using the website below. All your data-files are stored at DonorSnap servers (see www.donorsnap.com for more information about storage and backup procedures).

app.donorsnap.com

When you first sign-up, you will receive a SITECODE, and a generic ("admin") UserName and Password.

After logging in for the first time, go to **Maintenance > User-Setup** to add new users (with name-specific User Names and Passwords).

The Dashboard



The Dashboard allows you to add and view **Apps**, alerts and goals respective to your individual user account. These "apps" include:

- **Goals:** Set up goals to track performance, such as How is my Capital Campaign going? Or How many new volunteers have signed up since August?
- **Ticklers**: Calendar reminders for your contacts, such as those to follow-up with, Grant reports and application reminders.
- **Favorite Pages**: Create your own menu of DonorSnap features and reports you use most often
- **Quick Search:** Search for a contact from the Dashboard, it will open to the Listing tab of the database for direct editing.
- **Online Forms Open Records**: Alerts you that an online form has been submitted and needs to be processed
- **Acknowledgements Pending**: Alerts you to print/email acknowledgements for donations received
- **OrgContact Emails Pending**: Alerts you to send the email notification to board members (or other solicitors) assigned to recent donations
- **Upcoming Free Training**: Calendar reminders of FREE upcoming trainings
- **Keep & Share Calendar**: Display a calendar on your home page (www.keepandshare.com)
- **Recent Donations**: Display a list of recent donations made
- **Top Donors**: Display a list of Top Donors to your organization
- **Pledge Report**: Shows all payments and pledges for Appeals, Campaigns, or Accounting Codes
- **Yearly/Monthly Bar Graph**: Display a graph of donations in a specific time period
- **Donor Retention**: Display the percentage of Donors retained in two time periods

Dashboard apps are **specific to the user**. Each user at your organization can have their own apps, and can customize the colors and order of their apps.

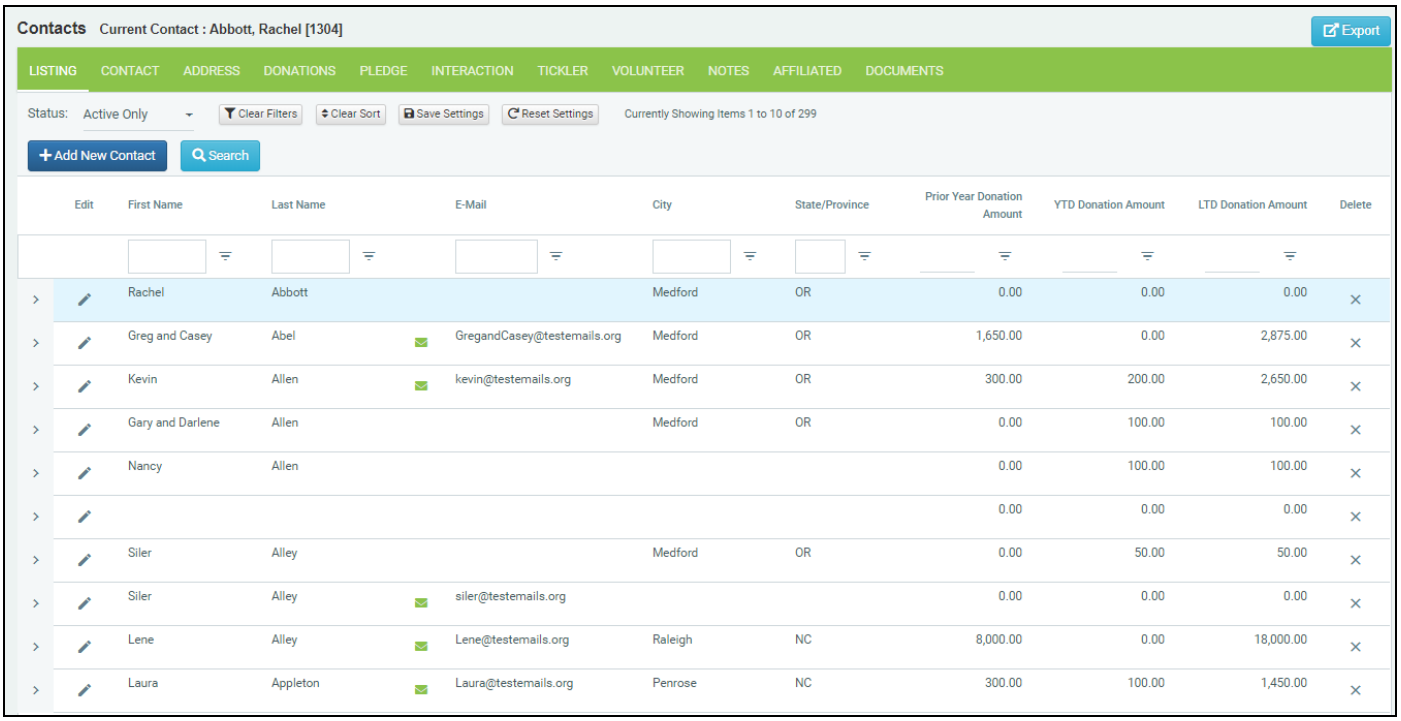
Additionally, if you have customized the security of your users, that security extends to the Dashboard (for example, a user who does not have access to Online Forms, will not have the ability to add the Online forms open records app).

The Database

The Listing "Grid"

Much like a spreadsheet, the Grid lists all the contacts in the database sorted by Last Name, one line per contact. Headers along the top provide brief information about each contact, such as Company Name, Acknowledgement, Last Donation amount, etc.

The Grid can be handy for "at a glance" information, such as all businesses, or top donors. Click the **EXPORT** button in the top-right to export to excel & print the grid.



Edit	First Name	Last Name	E-Mail	City	State/Province	Prior Year Donation Amount	YTD Donation Amount	LTD Donation Amount	Delete
	Rachel	Abbott		Medford	OR	0.00	0.00	0.00	×
	Greg and Casey	Abel	GregandCasey@testemails.org	Medford	OR	1,650.00	0.00	2,875.00	×
	Kevin	Allen	kevin@testemails.org	Medford	OR	300.00	200.00	2,650.00	×
	Gary and Darlene	Allen		Medford	OR	0.00	100.00	100.00	×
	Nancy	Allen				0.00	100.00	100.00	×
						0.00	0.00	0.00	×
	Siler	Alley		Medford	OR	0.00	50.00	50.00	×
	Siler	Alley	siler@testemails.org			0.00	0.00	0.00	×
	Lene	Alley	Lene@testemails.org	Raleigh	NC	8,000.00	0.00	18,000.00	×
	Laura	Appleton	Laura@testemails.org	Penrose	NC	300.00	100.00	1,450.00	×

Search (Filter):

1. Use the data-entry fields along the top of the Grid to search an individual. For example, enter last name in the LastName field, press Enter.
2. Click on the name you want, the line becomes highlighted. The top of the screen will say **Current Contact = Person**.
3. Now use the **Tabs** (Contact, Address, Donation, Pledge, etc.) at the top of the screen to enter data for that contact.
   i. **Note** Change the color and appearance of your tabs under your user in the top right of the program, **Change Theme**.
4. Instead of searching by Last Name or Acknowledgement (or any other field on the grid), use the **Search** button at the top of the grid to search All Fields at once. For example, if you search for "Harrison" you might see results for contacts with the Last Name of Harrison, and also contacts which have an address on Harrison Street.

Add:

1. Click the blue **Add** button at the top, to add a new contact. This will launches the Contact screen first.
2. Once you create a person, then you can add donations or interactions.

DonorSnap allows duplicates. When adding a new contact, the program will list potential duplicates to help, however please research any new contact to see if they exist in the database before entering a new contact.

Sort:

1. Like Excel, use the headers along the top to Sort the Grid (for example, click on the header for "State" and the Grid will now be sorted by State).
2. One click sorts in ascending order (A-Z or 1-10), click again to sort descending (Z-A or 10-1).
3. In the top left it will say "sorted by….". Click **Clear Sort** to get back to the default sort.

Active/Inactive and Delete

1. On the **Contact** screen for each contact, use the "Active" box to indicate whether a contact is an active donor or participant with your organization.
2. UN-check the **Active** box when someone becomes deceased or opts out of participating.
3. At the Listing Grid at **Community > Contacts**, it lists all **Active** contacts.
4. Use the **Status** drop-down in the top-left to change from Active to Inactive or All.
5. **Delete** a contact by selecting the X icon to the right of the grid.

Be Cautious with the Delete button. Remember, there is no "Recycle Bin" on the internet.

Customize the Listing Grid

1. Change what fields are visible on the Listing Grid, and/or re-arrange the order of the fields.
2. Customize the **Default** (each user at your organization will have the same grid) under **Maintenance > Site-Setup > Field & Screen Customization > Screen Layouts**
3. Customize individual User Grids (each user can have different fields visible on their grid) under you **User Name** (in the top right of the program) **> User Settings**.

Database Fields

The Database is constructed of **Black** "DonorSnap" fields which all users of DonorSnap will have installed with their site. For example, on the **Donation** tab, there are 6 drop-downs which come installed with DonorSnap for "DonationType", "Appeal" and "Campaign".

Customize the options under these drop-downs under **Maintenance > Site-Setup > Field & Screen Customization > DonorSnap Site Lookups**

More BLUE "User Defined" fields can be added to the database at any time under **Maintenance > Site-Setup > Field & Screen Customization > User Defined Setup**.

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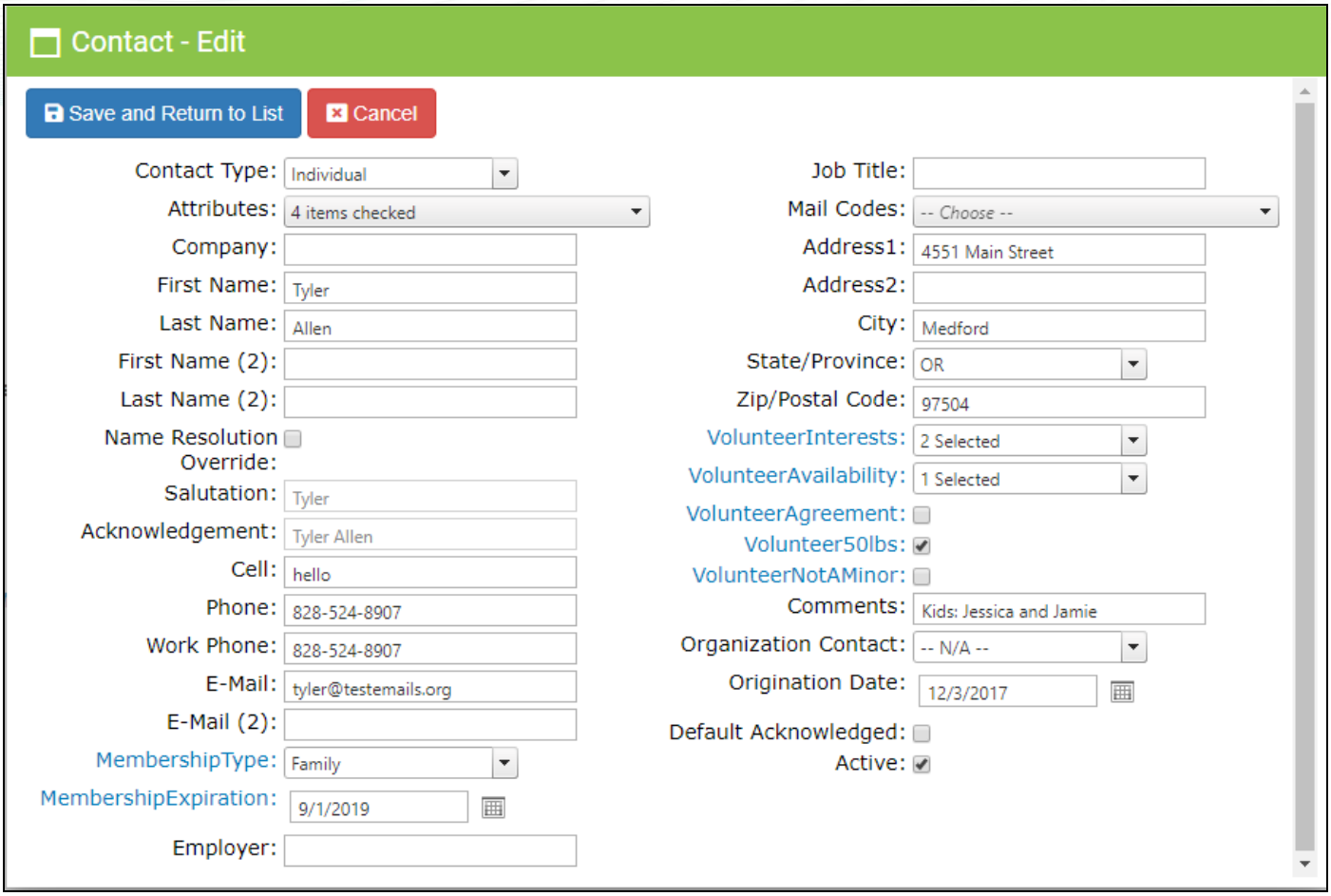
The Contact Tab



The Contact tab is used for both Contact Information and additional fields about the contact, such as Member type and/or Volunteer Interests.

- **Contact Type:** Indicate Individual, Business, Foundation, etc. contacts. This is a single-select drop-down (meaning you can only be one of the options).

- **Attributes:** For roles & relationships (comes with Board Member, Volunteer, Prospective Donor). This is a multiple-select drop-down, meaning a drop-down of checkboxes. A contact can have multiple roles and relationships.

- **Company Name**: Use for Business/Church/Foundation contacts. This will print on the reports as the Donor.
    - For Individual contacts, use the Employer field to track where they work.

- **Name Resolution Fields:** DonorSnap comes installed with space for Two Names. Enter the contact information as you need for your records.
    - Many organizations will combine a married couple in the First Name field, if they have the same last name. For example: First Name: Bob and Mary; Last Name: Smith
    - Based on how you enter the names, the program will automatically generate the "**Acknowledgement**" and "**Salutation**" fields, as options to help you when you do Mail Merge for labels and letters.
    - Salutation: the "Dear X" line of your letter. Will pull First names.
    - Acknowledgement: Formal Mailing Label. Will pull First/Last names
    - Check the **Name Resolution Override** box to override the automatic generation by the program and customize the Salutation and Acknowledgement as desired.

- **MailCodes**: For mailing preferences to help when generating reports such as those contacts who will continually donate however do not want to be solicited.

- **Organization Contact**: Tracks the "solicitor", and assigns the Board member or Development Committee member to the contact .
    - Add/Edit Organization Contacts in this drop-down under **Community > Organization Contact**.
    - When a contact makes a donation, DonorSnap will email the Organization Contact to let them know.

- **Address** fields are entered on the Contact Tab and copied to the **Address tab.** Additional addresses for Work or Seasonal can be entered on the **Address Tab**.

- **Active**: Un-check the "Active" box when a contact becomes deceased or opts out of participation (each organization has different rules on what constitutes an "inactive" contact).
    - When building reports, choose All Contacts or Active Only, so inactive contacts will not receive mailings

- Many organizations will add additional "User Defined" fields. Add BLUE fields under **Maintenance > Site-Setup > Field & Screen Customization > User-Defined Controls.** Some ideas include:
    - **Volunteer Interests**: add fields for Volunteer Information such as Interests, Availability, certain Credentials (CPR Certified). Note there is a **Volunteer Tab** which is used to track WHEN a volunteer works, where they worked and what hours. However fields on the **Contact Tab** will be useful to track Interests.
    - **Membership Types**: add fields for Membership such as Start Date, Expiration Date, and MemberType to track your memberships.

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Donation Tab

The Donation Tab will show another Grid, listing all historical donations for that contact.

LISTING | CONTACT | ADDRESS | DONATIONS | PLEDGE | INTERACTION | TICKLER | VOLUNTEER | NOTES | AFFILIATED | DOCUMENTS

Clear Filters | Clear Sort | Save Settings | Reset Settings | Currently Showing Items 1 to 10 of 10

+ Add New Donation | Search

Edit	Donation Date	Amount	Donation Type	Campaign	Appeal	Quick Receipt	Delete
	1/16/2019	100.00	Donation	Capital Campaign			
	8/3/2018	100.00	Donation	Capital Campaign	Fall Appeal		
	7/11/2018	200.00	Pledge Payment	Building Addition			
	10/3/2017	50.00	Membership Dues				
	3/3/2017	200.00	Donation	History Campaign			
	9/12/2016	50.00	NEW membership				
	1/27/2016	150.00	Donation	Building Addition	Winter Appeal		
	6/10/2014	150.00	Event Registration	Building Addition	Golf Tournament		

Click the blue **Add Donation** button at the top of the Donation Grid, to add a new donation. This will bring up a Data-Entry screen for a new donation:

Add Donation

+ Save and Add Another | Save and Return to List | Cancel

Donation Header:

Donation Date: 3/9/2019
Accounting Period:
Payment Method: -- N/A --
Reference #:
Batch Code: -- N/A --
Anonymous:

Donation Detail:

Associated with Pledge: -- N/A --
Appeal: -- N/A --
Amount:
Accounting Code: -- N/A --
Value Received:
Comments:
Donation Type: -- N/A --
Acknowledged:
Campaign: -- N/A --
Organization Contact E-Mail Sent: No

+ Add Split Donation

Customize drop-downs under **Maintenance > Site-Setup > Field & Screen Customization > DonorSnap Site Lookups**

- **DonationDate:** Automatically inputs Today's Date. Change to whatever date your organization records: Date Received, Date of Check. All DonorSnap reports are based on this date field.
- **Payment Type**: Check, Cash, Online, Paypal, Money Order, Stock, etc.
- **Batch Code**: Title of the Thank You letter to be generated by DonorSnap.
- **Accounting Period**: another date field. Some organizations use it for Deposit date.
- **Reference #**: Check number, last digits of the credit card, PayPal confirmation etc. (do not store full credit cards in DonorSnap)
- **Anonymous**: Check the box if the Contact has requested to remain anonymous.
    - If you receive anonymous donations from donation jars or the like, consider creating an entire contact for "anonymous" or "cash donations" to track those that you truly do not know where they came from.
- **Associated with Pledge:** Link this payment to a pledge if the contact has one
- **Amount**: The Amount of the Payment
- **Value Received**: If a donor receives something of value in return for their payment, such as a meal at the banquet, a round of golf, etc. DonorSnap will calculate Amount – Value Received = Tax Deductible amount
    - For example, $50 is the Amount of the Dinner; $13 is the Value Received, which was paid out to the Caterers. The program is generating another amount not visible on the screen for the Tax Deductible Amount of $37.
- **Donation Type**: Broad types: Donation, InKind, Event Registration, Grant, Memorial Donation, Matching Gift, Pledge Payment, etc.
- **Appeal**: Fundraisers such as your Events (Golf Tournament) and mailings (End of Year Appeal)
- **Campaign**: The Project the donation is funding, such as capital or annual campaigns, building addition funds or specific missionary trips. (not all organizations have Campaigns)
- **Accounting Code**: Where the money is going in your accounting software; the different "Funds" of your organization. If you are using the integration with QuickBooks you must use the Accounting Code.
- **Comments:** 3-sentence text box. Would list the description of the inkind donation or who the memorial payment was for.
- **Acknowledged**: Is defaulted to un-checked, so DonorSnap will generate a Thank you letter. Once a letter is printed, DonorSnap will check the acknowledged box and record the date the letter was printed.
    - For older checks that have been acknowledged, check the box. The program will not print a Thank You letter.
- **Organization Contact Email Sent**: If you have an Organization Contact (board solicitor) set on the Contact screen, this box will then say "Pending" meaning you will send an Email to that Organization Contact – on the Dashboard – alerting them that their donor has given a payment. Most will say "no" if you are not using the OrganizationContact field at all.

In order to print Acknowledgement Letters from within DonorSnap,
you must enter a Batch Code on the Donation tab, and leave the Acknowledged field blank.

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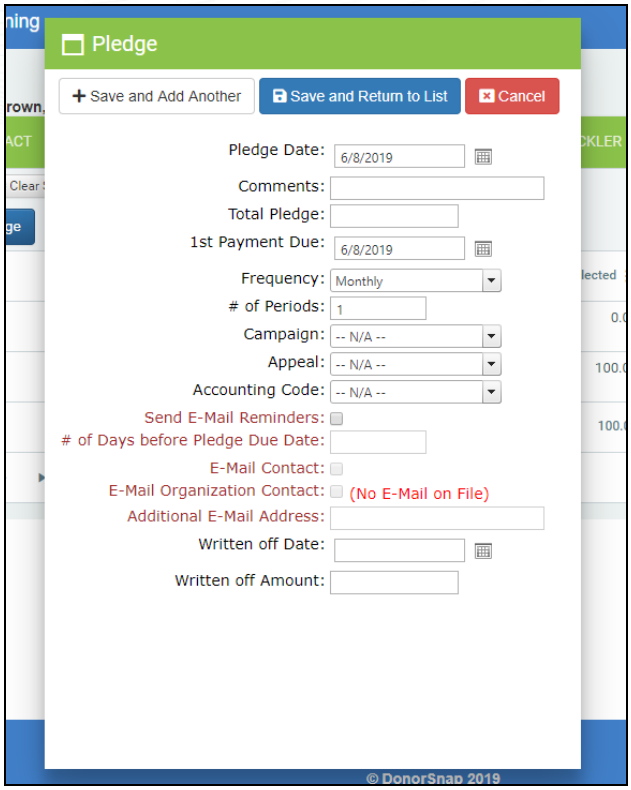
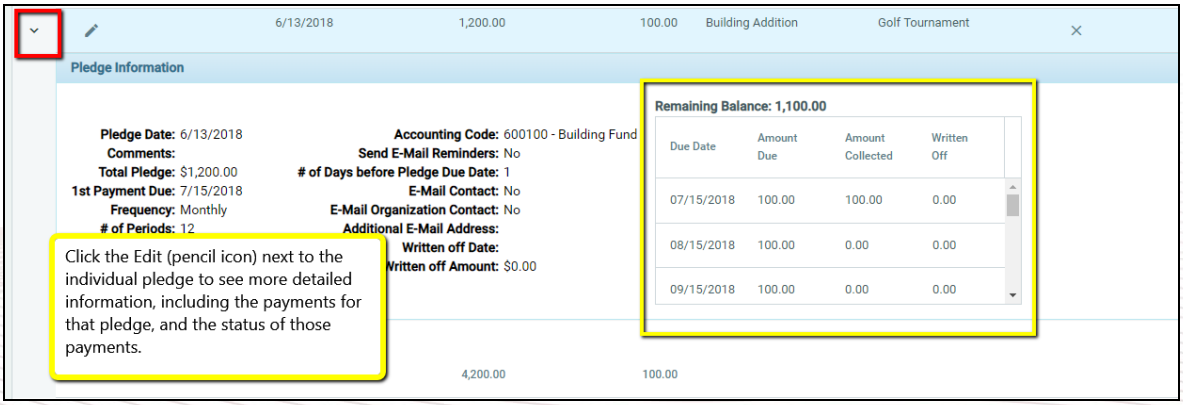
Pledge Tab

Pledges are commitments to give a donation. Enter the **Pledge** (what they WILL pay) on the Pledge tab, then the **Donation** (what they actually pay) on the Donation Tab.



Use the **Total Amount** (for example, $3000), first-date-due, Frequency (how often, such as annually) and the # of periods (3, for 3 years) to calculate the pledge. Enter the campaign/appeal/and acting code. Save the pledge.

On the Pledge Grid, next to the EDIT button of an existing pledge, is a small arrow. Expand this to see inside the pledge: all historical donations received and projected due-dates for the pledge payments.



Other Activity Tabs

Interaction Tab

- Track Interactions of non-financial activity such as Phone Calls or Event Attendance.
- Customize the Interaction tab to include all your Event activity such as "who attended", "Class Sessions" etc., and or build an Online Form so contacts can sign-up for Events on your website.
- Interactions can be updated on a Mass basis. If you create your mailing list in DonorSnap, you can use the **Processing/Interaction Mass Update** field to enter a code for all the 300 people you invited, in one shot.

Notes Tab

- Each note is 1 ½ pages long (3000 characters). Enter as many notes per contact as needed.

Tickler Tab

- Ticklers are an inhouse module to use as sticky notes for Contacts you need to touch base with or Foundations and Grant applications you're completing
- Ticklers will appear on the Dashboard.
- Assign ticklers to your staff or Board members. Add names to the "Person Responsible" field, under **Community > Tickler Person Responsible**.
- Ticklers can be emailed to the Person Responsible after the Follow-Up date has passed or a week in advance.

Volunteer Tab

- DonorSnap can be your Volunteer Database, tracking the hours and locations that you volunteers work.
- Add your event codes **Maintenance > Site-Setup > Field & Screen Customization > DonorSnap Site Lookups** and the hours that your volunteers worked.
- This is NOT where you track information such as where they WANT to work. Track Volunteer Interests, Availability, and Skills by adding User Defined fields to the **Contact** tab.

Affiliated Tab

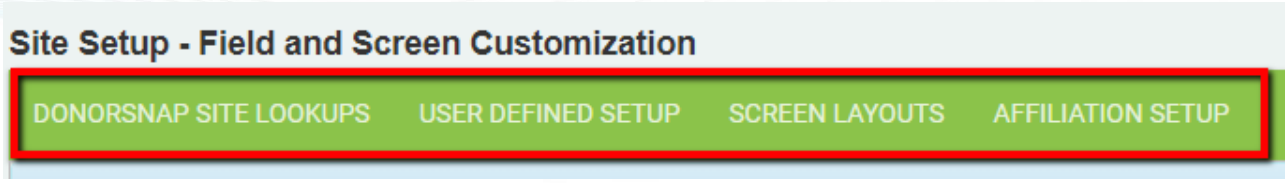
- Track relationships between your Contacts, such as Parent/Child, Employer/Employer, etc.
- Customize your Affiliated types under **Maintenance > Site Setup > Field & Screen Customization > Affiliated Setup**

Documents Tab

- Document storage for your Contacts.
- Grant documents, letters, rules; background checks, special letters, etc.
- **Note** Do not upload documents that include Social Security Numbers nor Bank Accounts. (you can upload the copy of the background check but blacken out the social security number)

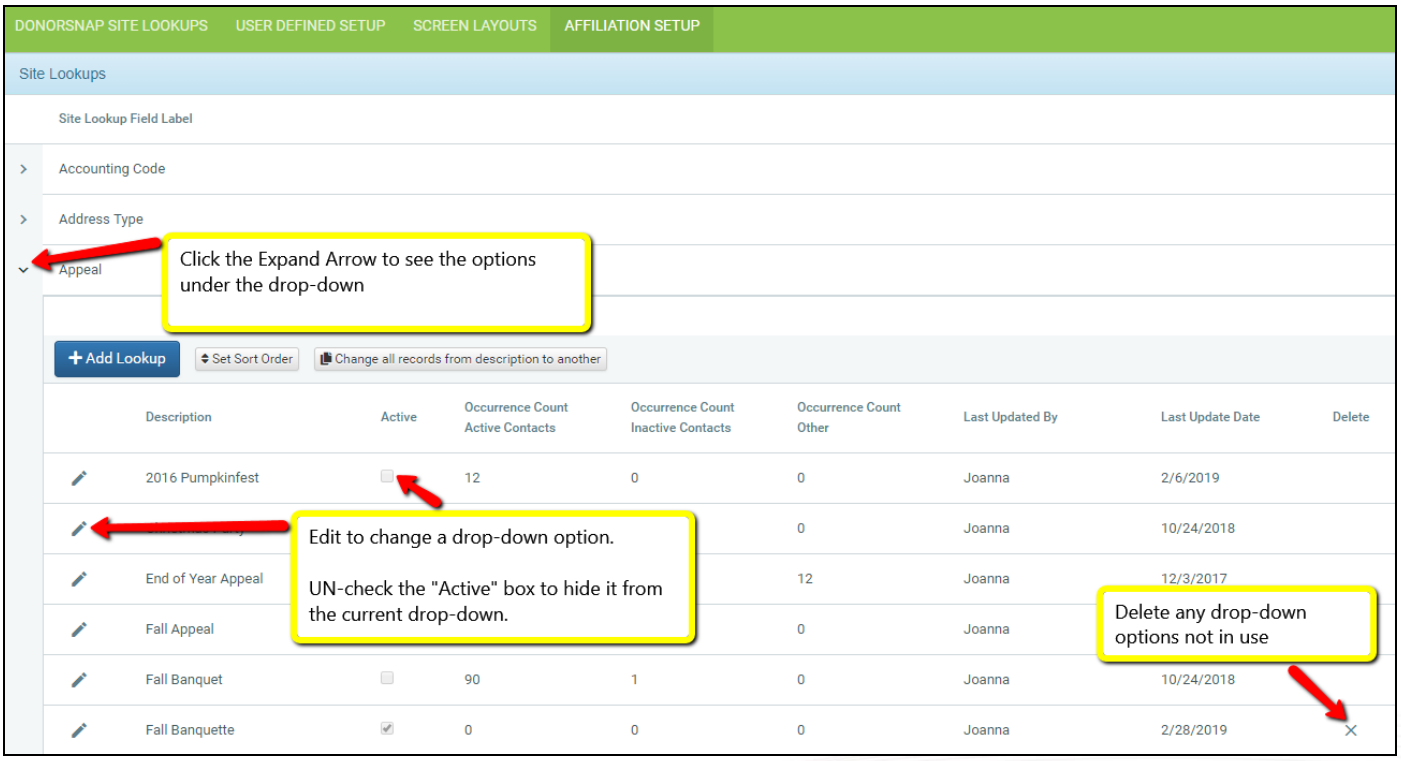
DonorSnap Set Up

Customize the database under **Maintenance > Site-Setup > Field & Screen Customization.** Here you will build all your drop-downs, add/edit fields, and change the layouts of your grids and screens.



DonorSnap Site Lookups

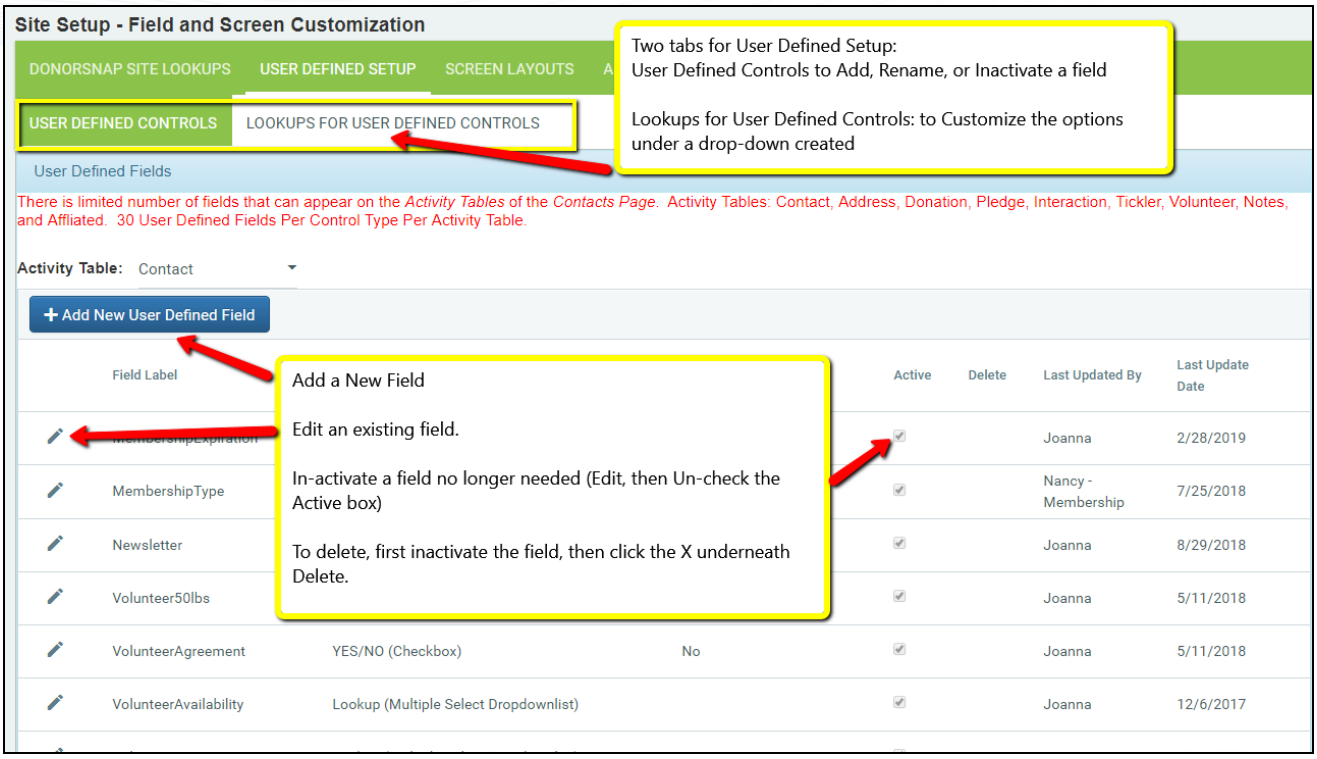
Customize the drop-downs that are BLACK, that come installed with the program (Campaign,, Appeal, etc.)



- Use the expand arrow to the left to Expand out the list.
- Blue Add Lookup button at the top to add; use Save icon to isert
- Pencil button will EDIT; either change text OR to "inactivate" – older codes you'd like to save for historical purposes, but no longer need the option to appear in the drop-down
- As long as there are ZERO records attached, a Delete X is available all the way to the right.
- *Change All Records* button in the top right allows you to consolidate records

User-Defined Settings

Add new fields to the database. Customize existing BLUE fields.



User Defined Controls – ADD fields

- Choose the table you want to add fields (the Contact tab is selected by default)
- Click **Add New Record** and Name your field.
- Choose the Type of field – text box, date.
    - Single-select drop-down: a drop-down where you can only choose one of the options – such as "MembershipLevel" or "Church Attended"
    - Multiple-select drop-down: where you can choose multiple options from the list, such as "attributes" where a contact can be both a Board Member and a Volunteer
- Click the **Check Box** to SAVE.

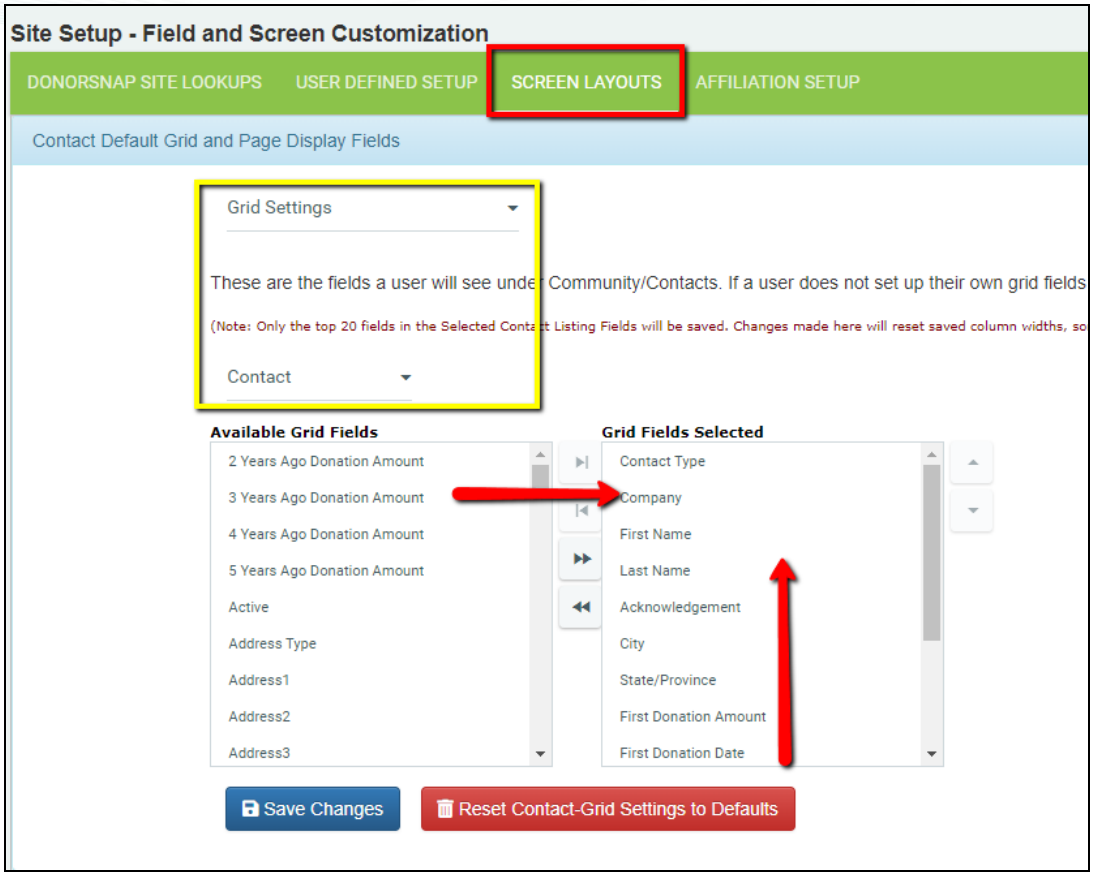
To **delete fields, use the pencil to EDIT the field, UN-check the Active box, hence making it "inactive". Save. Now the line will appear as Red and the Delete "X" is now visible.

Lookups for User-Defined – add/edit drop-downs for fields

- Click the Expand arrow next to the item you wish to edit
- ADD button at top; pencil on the side to EDIT.

Screen Layouts

Screen Layouts page allows you to modify both the Grid Settings (the **default** Grid Settings for the entirety of the program, all users) and the Page Display (the Contact or Donation entry pages).



Use the drop-downs on the left to toggle between whether you want to change the Grid Settings or Page Layouts, and to what Tab.

Grid Settings: The spreadsheet view for each tab.

Note: This location will save the **Default** grid for all users. **DonorSnap** can have different **Grids** per user (meaning whomever is logged in, can have a different grid than someone else. To change grids based on user, go to **Home-User-Defined Settings**. What you do there WILL OVERRIDE what you do here under Site-Setup.)

Page Layout: The data-entry page for Contact or Donation, etc.

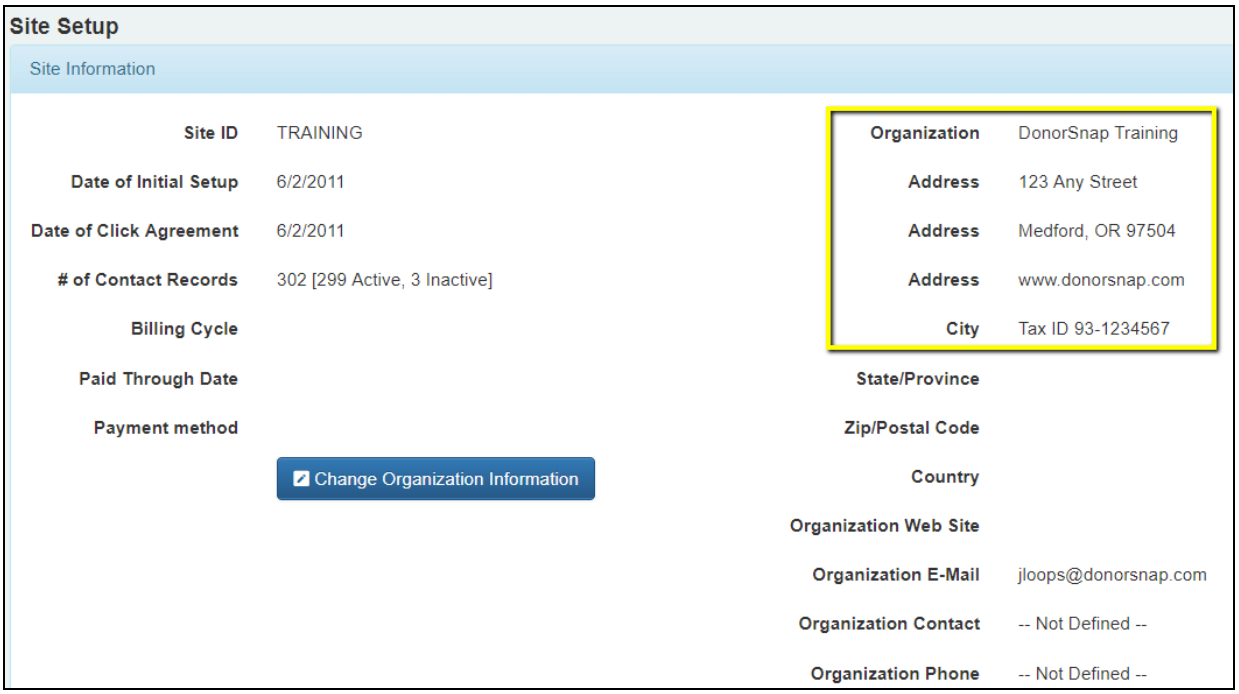
LEFT will list what's available; RIGHT will list what you have currently. Simply drag over.

When on the Page Layout page, you can not only hide fields (drag to the left) or add fields (drag to the right), but you can change the order of how your page looks. Move things around! Put the company at the top, put all address-related fields together, for example. Simply drag the names of the field to where you want, let go.

Click **SAVE** at the bottom.

Other Setup Options

Site-Information



Your organization information. The top 5 lines pull on to the **Contribution Statement** (Reports/Donation Activity/Contribution Statement) printed at the end of the year. Customize those fields to any information you'd like to include, such as Tax ID# and website.

Email Settings
Customize the Four different automatic emails: Organization Contact notices, Tickler Reminders, Pledge Reminders, and defaults for Email PDF Acknowledgements.

Integrations
Integrate DonorSnap with:

- goEmerchant for online donations
- QuickBooks

- Constant Contact (to send DataMinerPlatinum reports of email lists to your Constant Contact account. Processing > Constant Contact)
- DonorSearch, a donor research and rating 3rd party program

Merging Contacts

Check your database often for duplicates. Remember that DonorSnap allows for duplicates. There may be a contact record for John Connelly, who donates individually; and also John Connelly as the contact person for his business which also donates. However, some records (such as spousal relationships or businesses) may become duplicated over time and should be researched and possibly merged together.

Reports > Administrative Reports > **Duplicates Report**.

There are 6 different ways to run the report:

Duplicate Organization

Contact	Last Name	First Name	Organization	Phone	Address1	City	Inactive
6			Alabama Association of the Deaf				No
139	Peterson	Jimmy	Alabama Association of the Deaf				No
434			ASL Presents, LLC		25321 Morse Ct	Hayward	No
464	Lentz	Ella Mae	ASL Presents, LLC		25321 Morse Court	Hayward	No

Maintenance > Merge Contact

Type in the name(s) of the contacts, selecting the correct name/ContactIPK from the list (the Old record will be the Contact to be "Inactivated" and the New will be the Contact to be saved. All activity (Donations, Interactions, Notes, etc.) will be moved from the Old record to the New record).

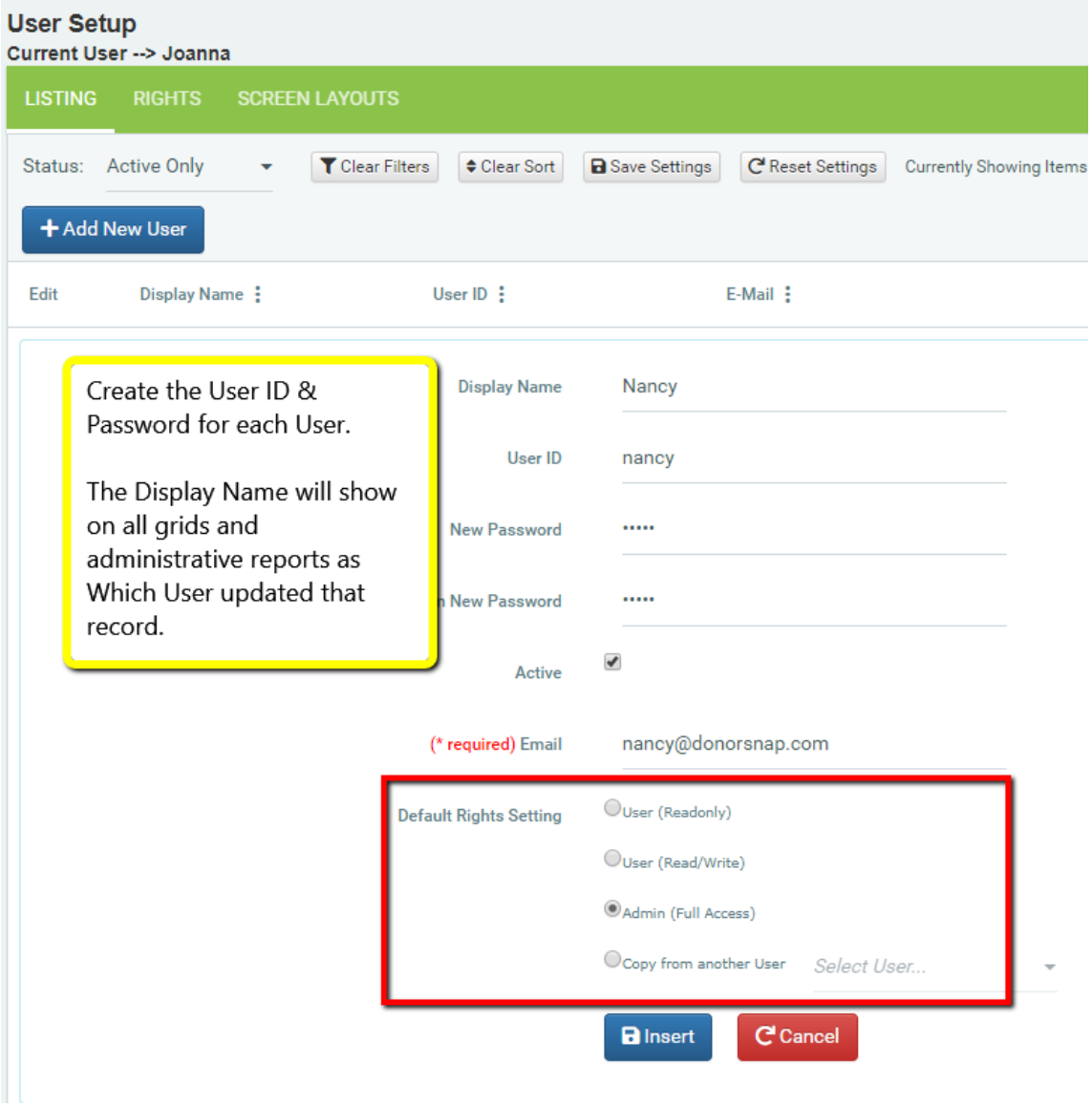
Click **Get Merge Information** to list what activity will be moved.

User Setup

Maintenance > User Setup

With your DonorSnap subscription, **you can have unlimited Users**.
You define the "Rights" for each user. And just to note, all users can be Administrators if you want. You are not limited in any way.

Click **Add New** to create a New User.



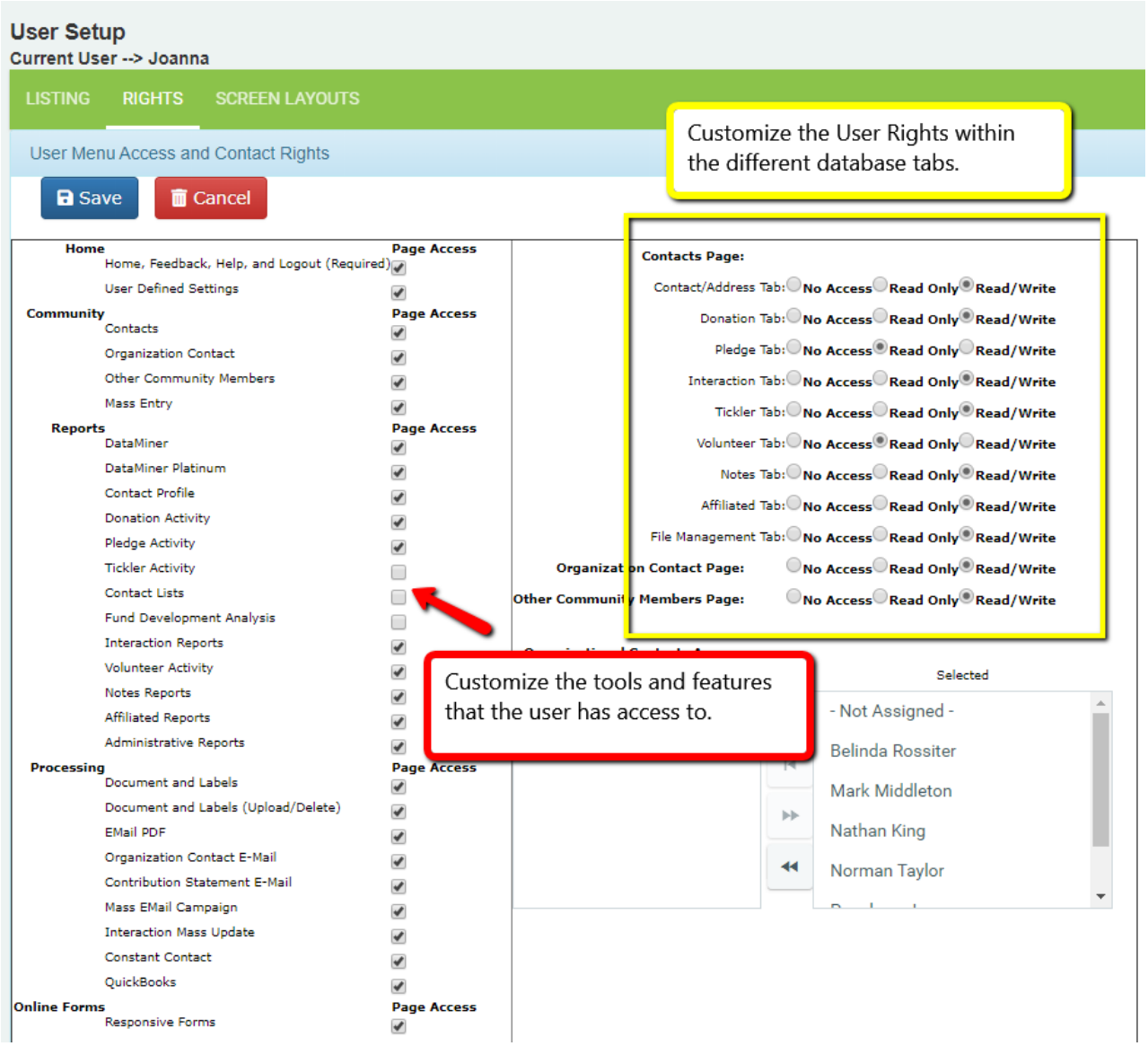
General security options are:

Admin (Administrator): Full access to the program; all database tabs and features

User (Read/Write): Full read/write access to the database, and all features **EXCEPT the Maintenance tab** and all functions underneath Maintenance

User (Read Only): Read only access within the database (can see Donations but not add new payments, for example), and all menu options (Reports/Letters/Forms, etc.) **EXCEPT the Maintenance tab.**

Customize Rights for an Individual User more specifically by clicking the **Rights** tab along the top.

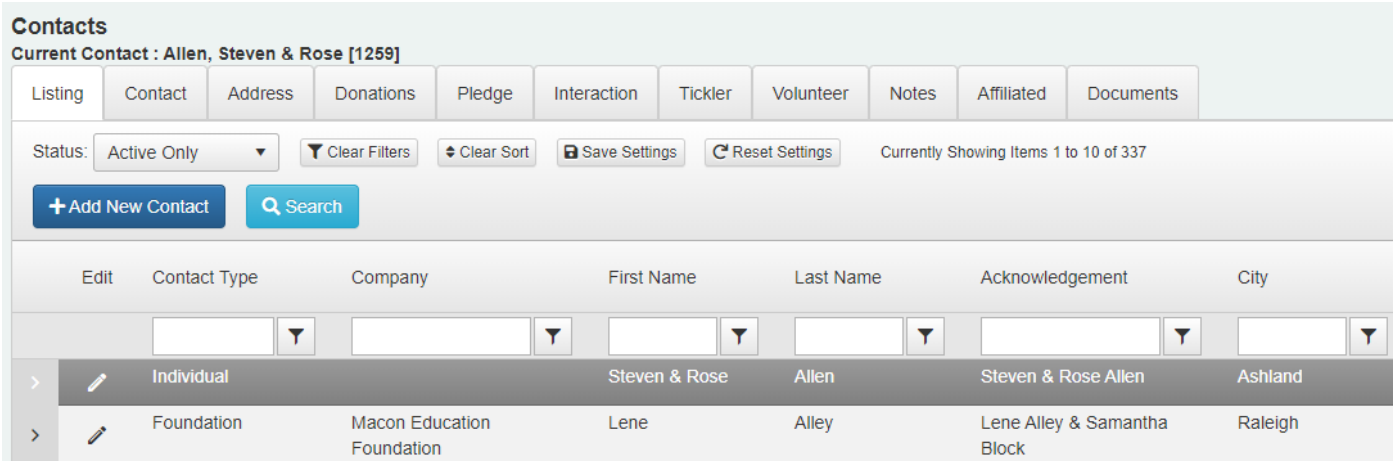


User Settings

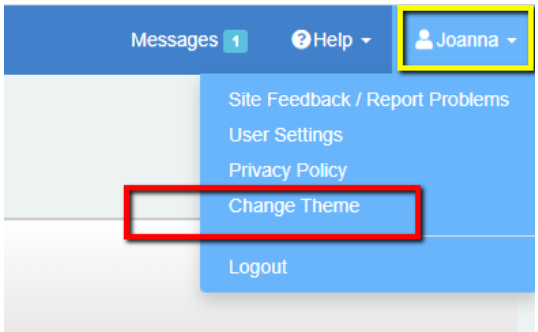
Once logged in as Your User, now you can customize the look of DonorSnap to your liking.

1 – Create your **Dashboard Apps.**
On the Dashboard click the **Add App** button to the far right.
For example, if you print the Thank You letters, add the app for "Acknowledgements Pending"
If you process the online payments, add the app for "Responsive Forms Open Records"

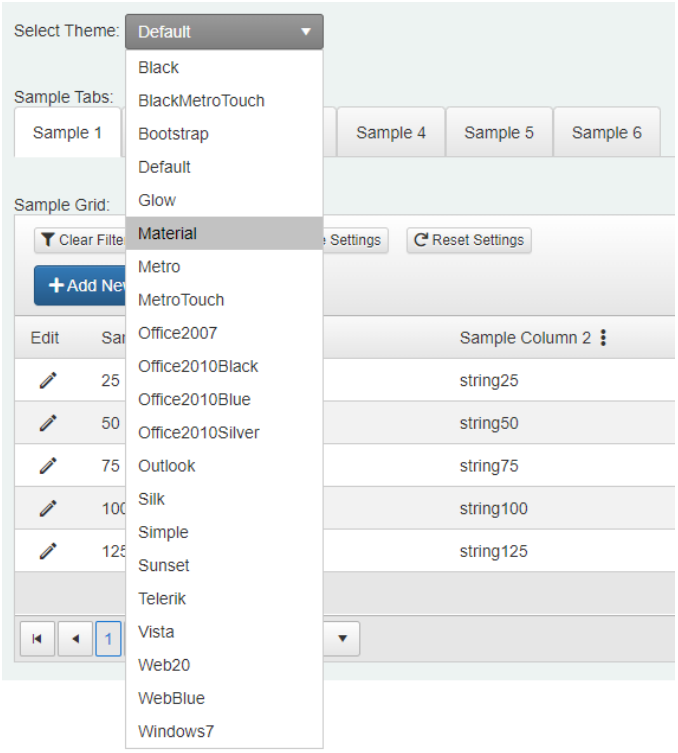
2 – Customize your **Theme** – the color of the tabs.
Throughout the program, there are TABS. Tabs in the database, tabs in the Setup, tabs in the Reports.
By default, they will be in Grey.



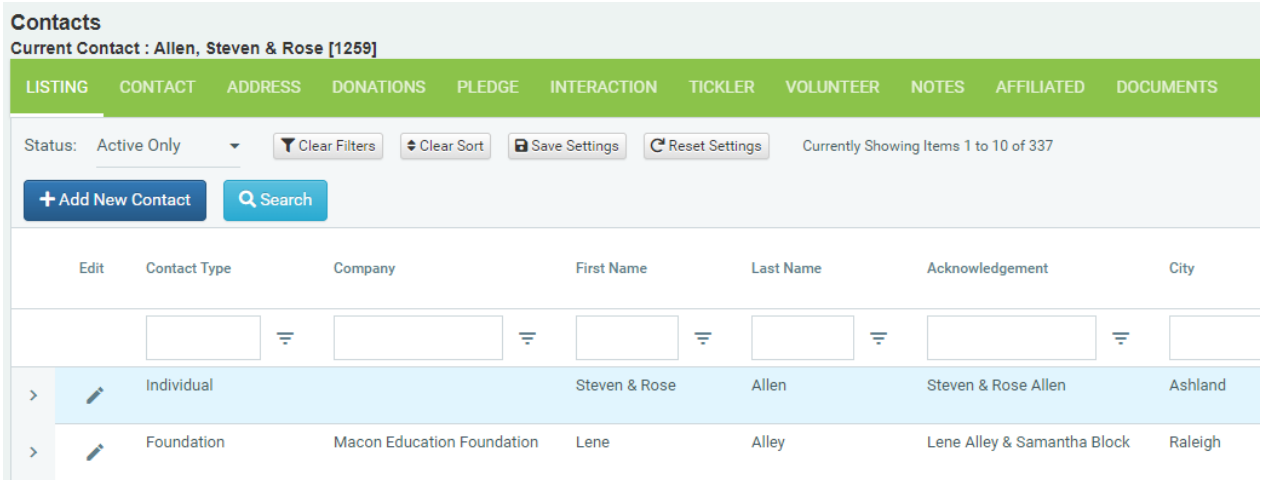
In the Top Right of the program is your **User Name > Change Theme**



Choose from the available Themes. The sample tabs will show the different colors for that theme.
Note that our training guides and videos use the “Material” theme, which displays the tabs in Green



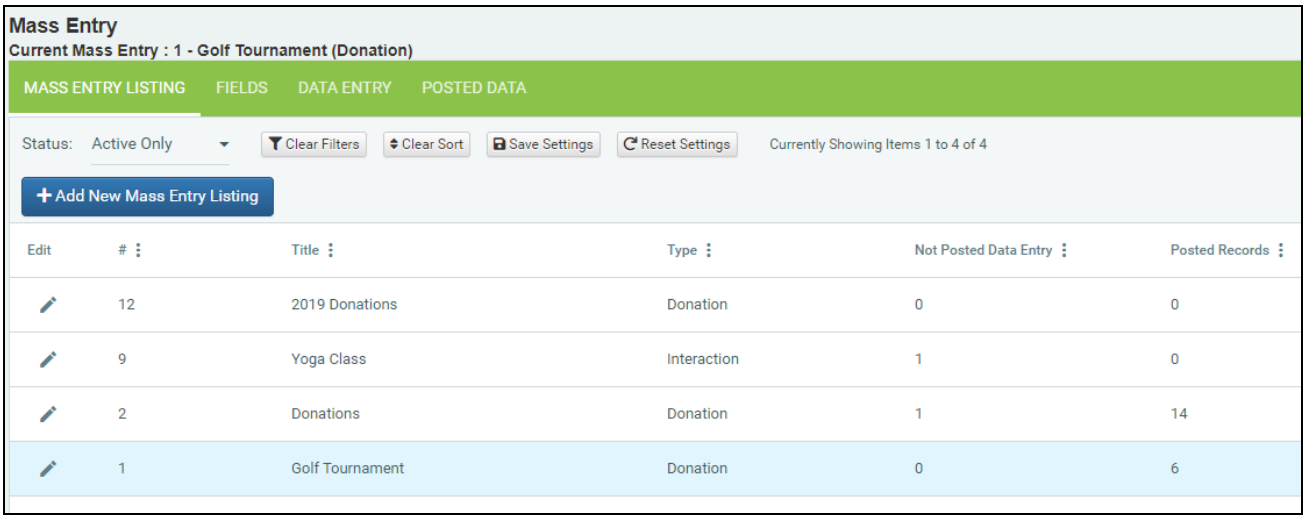
Here is the Listing Grid showing the Database tabs in Green, using the Material theme.



Mass Entry

Community > Mass Entry

The Mass Entry tool allows you to enter Donations, Interactions, and/or Volunteer hours in bulk. The video covers the process for building a **Donation**-based mass entry, however the process is the same for Interactions and Volunteer Hours.

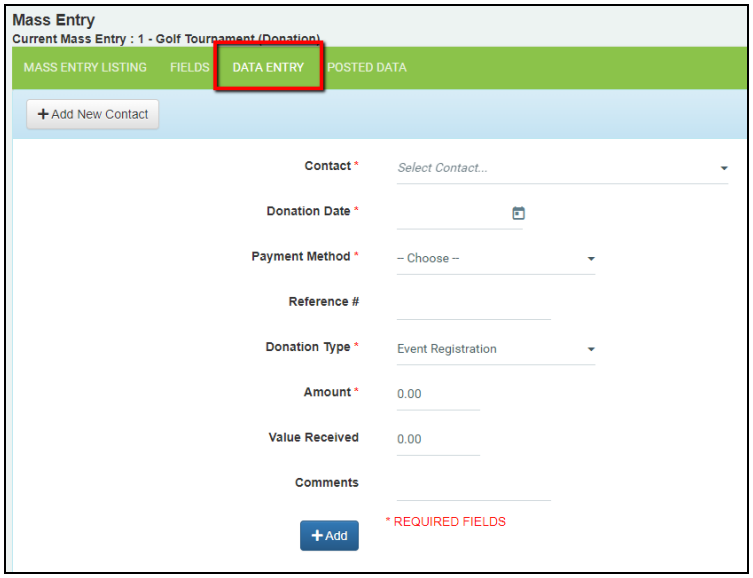


Fields Tab

- Use the Fields tab to design the data-entry form.
- Drag fields from the left (Not Used) box to the right.
- Drag fields up and down to re-order fields (remember on the data-entry screen, you can TAB through the fields so put them in order that makes the best since to your data entry team).
- **Required**: Make fields Required to submit form
- **Default Value:** Set a default value – for example, if you create a mass entry for the Golf Tournament, all payments through this process will have certain set crtieria, such as DonationType = Event Registration and Appeal = Golf Tournament.
- **Hidden**: If you set a default value for a field, you can now Hide the field from the data-entry page. Information will still be submitted to DonorSnap.
- **Auto-Copy:** Auto-copy information from one submission to the next. For example, Payment Method is a good one for this field. Enter your first payment and define "Check". The next payment will have Check copied in to the Payment Method field.

Data Entry

- Once you've set up the fields of your Mass Entry as needed, use the Data-Entry tab to start entering!
- Choose your contact by searching for First, Last, or Company name.
- Click the blue **New Contact** button to add a brand new Contact. Once you save the contact, it will be the Contact you're adding the payment for.
- Click the **Add** button when you're finished with that entry; the addition will appear at the bottom of the screen and your cursor is read back at the Contact field to search for the next submission.
- Click **Post** at the bottom to post all entries in bulk.



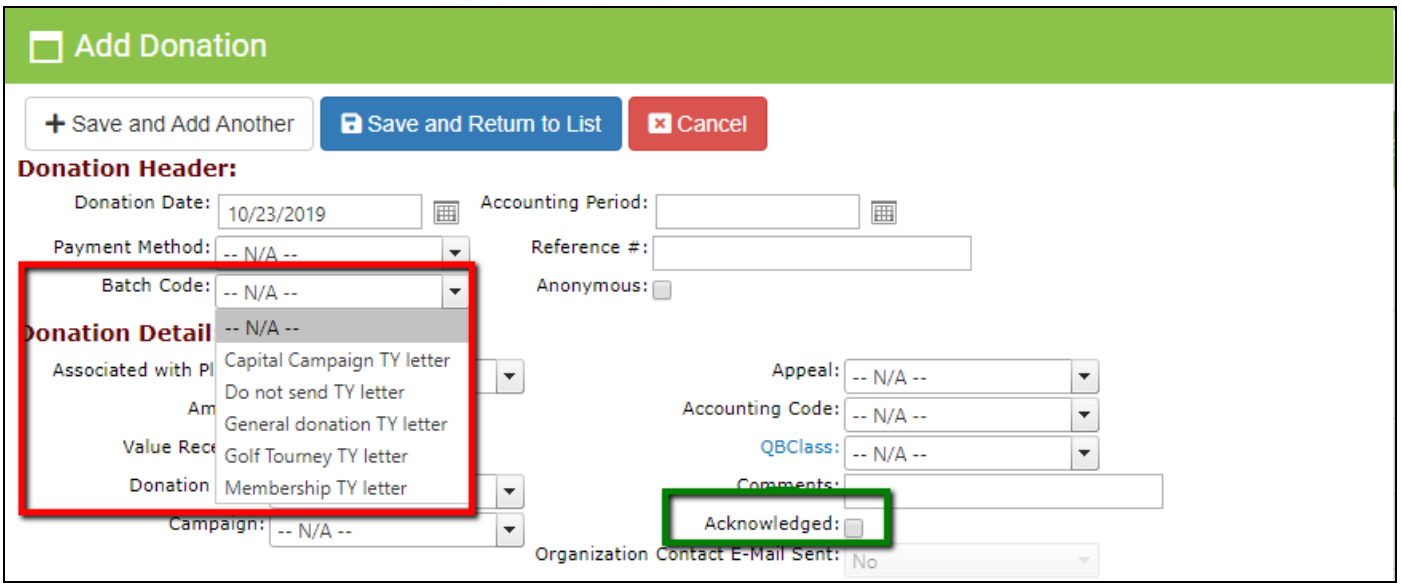
Posted Data

The Posted Data tab will show all submissions through this mass entry form. Click the DonorSnap logo next to the contact name to enter the database where you can now view, edit, or delete.

Acknowledgement Letters

Multiple Acknowledgment Letters can be uploaded in to DonorSnap. As you enter donations, DonorSnap will want to print this Thank you/Tax Receipt letter.

Entering Donations



As you enter a donation, use the **Batch Code** field to tell the program WHICH LETTER to print. (populate the drop-down with the titles of your thank you letters by going to **Maintenance > Site Setup > Field & Screen Customization > DonorSnap Site Lookups**).

At the bottom of the page is an **Acknowledged** box. By default, this remains UNCHECKED, indicating that the donation is NOT yet acknowledged, triggering DonorSnap to remind you to print the acknowledgment letters. Once the program prints the Acknowledgement letter, it will check the "Acknowledged" box for you and record a date it was acknowledged.

To generate a thank you letter, leave the Acknowledge box Un-checked.

Note: For older donations you are entering or modifying, Yes, you can check the box manually indicating that the donation was already acknowledged.

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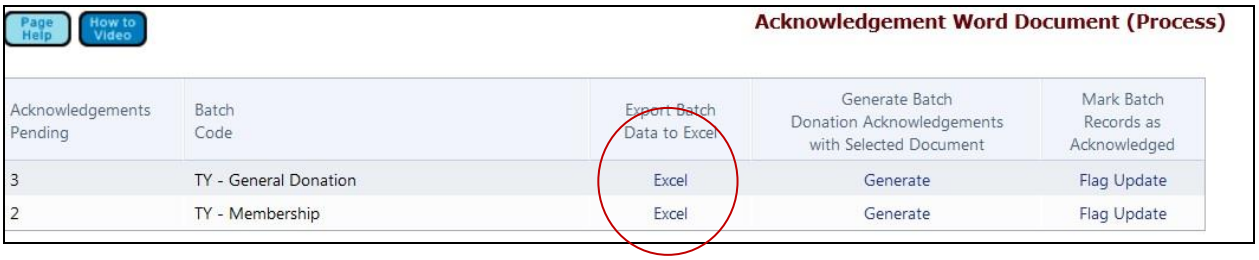
Creating your Acknowledgment Letters in Word

You create your letters in Microsoft Word – with logo and images as you want; insert your Merge fields; upload in to the program. Create your letters in Word, download an Excel file out of DonorSnap to receive the fields available to merge with your letter, so the letter talks directly to DonorSnap.

Step One: Download the Excel Document to Create the Merge

1. Enter a donation (this can be a "fake" donation) to trigger the acknowledgement process.

2. **Processing > Documents and Labels > Donation Acknowledgement Letters** (or from the Dashboard, click the "Print Letters" from the Acknowledgement Letters pending app)



Acknowledgements Pending	Batch Code	Export Batch Data to Excel	Generate Batch Donation Acknowledgements with Selected Document	Mark Batch Records as Acknowledged
3	TY - General Donation	Excel	Generate	Flag Update
2	TY - Membership	Excel	Generate	Flag Update

3. Click **Excel** in the middle of the screen to download an excel spreadsheet of the information saved in the acknowledgement. ***Note: You only need to do this **ONCE**. Save this file to your computer and ALL FUTURE LETTERS can be merged to this same Excel file. You only need the field headers for this process, to insert your merge fields.

The Excel file available for merging in to your acknowledgment letters will include **All fields** on the **Donation** tab (Appeal code, Accounting Code, Comments, etc.) and **All Fields** on the **Contact** tab (address, email, and any user-defined fields such as Membership Expiration Date or Child's Names). You can insert ANY of these fields in to your acknowledgement letter.

3. Save the Excel file on your computer (somewhere you can find it!). You will merge all your future letters to this file.

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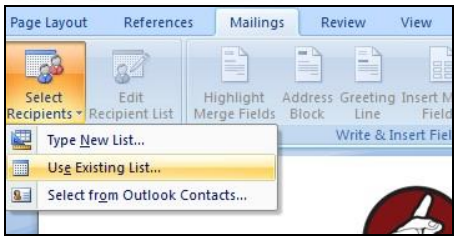
Donor Management Made Easy

Step Two: Create your Merged Letter in Word

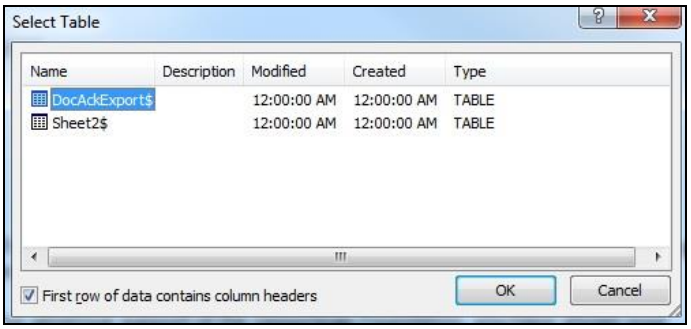
1. **Open** Microsoft Word and begin writing your letter. Insert your logos and fanciness as you see fit. You might want to give yourself some place holders for what information you want to merge…

"Thank you for your contribution of XX on XX"

2. Go to **Mailings**. Click **Select Recipients**, **Existing List**. Go find your Excel File.



When you pull in the report from DonorSnap, it will give you two sheets.



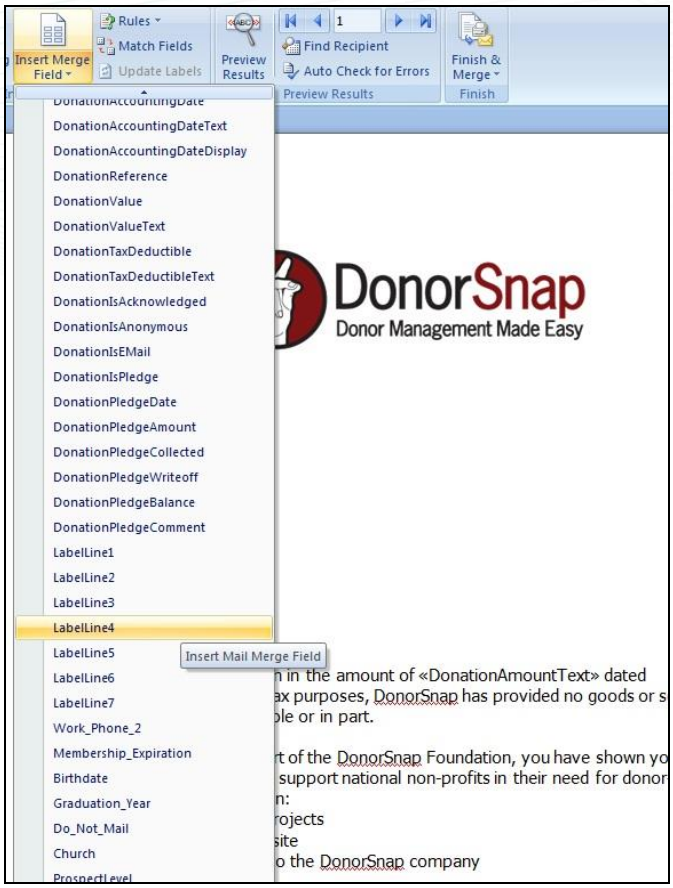
Choose the sheet that says DocAck. Click **OK**. (Nothing will happen, but your documents are now merged together).

3. Click the **Insert Merge Field** button – you will see the list of ALL the available fields (from both the Contact and Donation tabs) to insert into your letter.

Now you are ready to insert your merge fields. Place your cursor within the body of your letter where you want to insert a merge field. Choose the desired field from the **Insert Merge Field** button.

A few things to keep in mind:

- You are 100% in control of **what fields** you want to import in to your letter.
- Available fields include all the fields on both the Donation tab and the Contact tab – including User-Defined fields such as "membership type" and "Birthdate"
- "LabelLines" will pull in Company name/ Acknowledgment / and Address lines – and will *squish* the lines together. A good option for Address Blocks.



Make sure to insert merged fields for **DonationAmountTEXT** and **DonationDateTEXT**.
The fields that end in "Text" are the most properly formatted for your letters.

Once all your fields have been merged into their proper place, **SAVE** your letter. Import your letter in to the program with all the merge fields included. **Do not "finish & merge", do not "preview results".**

Upload your Letter under **Processing > Documents and Labels > Upload/Download/Delete**

**Note: Although you can upload letters in (.doc) or (.docx) format, we recommend that you save your letters as "97-2003 Version" to ensure compatibility among all your users.

www.DonorSnap.com
Message Center: 262-696-9158
feedback@donorsnap.com

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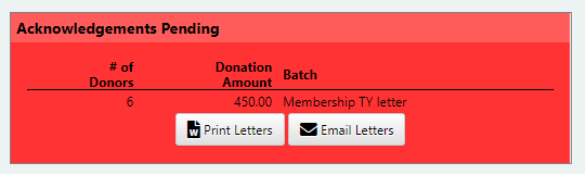
Step 3: Process Your Letters

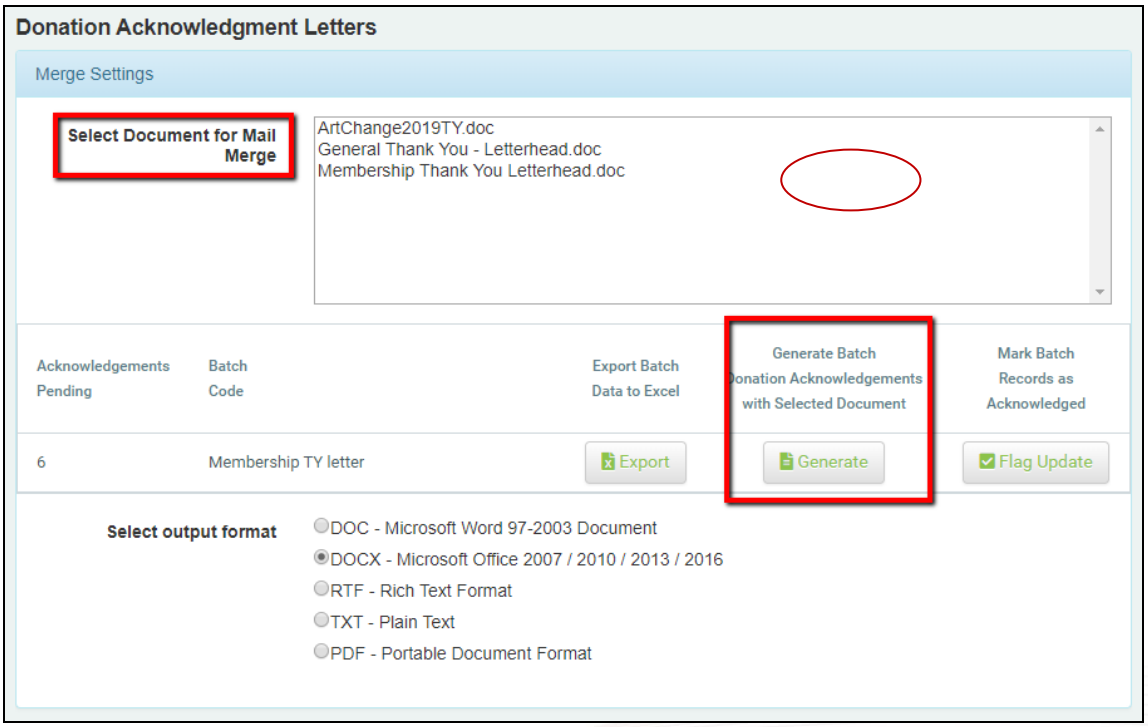
Now that your letters are uploaded, you are ready to generate your Thank You letters.

The Dashboard will alert you that you have donations entered which have not been acknowledged.



1. Click the **Print Letters** button directly from the App. (or Processing > Documents and Labels > Donation Acknowledgement Letters)

2. Match the listing of **Batch Codes** with the appropriate letter, and click **Generate.**



This will export your letters to Microsoft Word, **where you can edit before Printing**.

Once you have printed the letters, click the **Flag Update** button. DonorSnap will now check the **"Acknowledged"** box on each donation and record a date the donation was Acknowledged.

The alert on the Dashboard will also be removed.

Support Resources

Private Trainings

Each organization receives TWO free 1-hr trainings. The first to cover the set-up of your database, the second to be used at any time. https://www.donorsnap.com/private-training.php

Email Support: support@donorsnap.com 9am-5pm Central Time

Online Resources

- **Free Wednesday Webinars:** Each Wednesday at 1pm ET. 30 minutes. Different topics each week.
  - https://www.donorsnap.com/customer-training-signup.php
- **Help with Current Page:** If you're stumped on a page, click **Help > Help with Current Page** will take you to the help page associated with that page (for example, if you're on the Dashboard, this link will take you the help page about the Dashboard). Every tab and page of DonorSnap has its own specific help page.
- **Help Website:** The full Help Website where all videos, webinars and written instructions are located. This is organized by the same menus of the program:
  - https://www.donorsnap.com/support/