



Database Clean-Up

Many of the Administrative functions in DonorSnap are located under the Maintenance menu. Remember that in DonorSnap each user at your location can have different levels of security (which options you can perform in the program). If you do not have access to the Maintenance menu or other options covered below, you will need to change your User Rights under **Maintenance > User Setup** or have your Site Administrator do it for you.

Audit & Organize Fields & Screens

- Are you happy with **Contact Type, Attributes, Mail Codes** (these fields come with DonorSnap)? Or you might have your own fields for Relationships or Mailing Lists.
- Do you have a standard for Names 1 & 2; the **Acknowledgement** and **Salutation** fields
- Are you utilizing the **Deceased** check box, or your own relevant fields?
- Can you hide options in the Appeal / Campaign / Accounting Code drop-downs?
- Do you use ALL of the fields on your Contact & Donation screens? Are there fields you can remove?

Site Setup Options:

- Black “DonorSnap” fields for Contact Type, DonationType, Appeal, etc. under **Maintenance > Site-Setup > Field & Screen Customization > DonorSnap Site Lookups Tab**
- Blue “User Defined fields”, if you have an added field for “Attributes” or “Volunteer Interests” under **Maintenance > Site-Setup > Field & Screen Customization > User Defined Setup Tab**
- Hide fields no longer needed; change the order of fields
Maintenance > Site Setup > Field & Screen Customization > Screen Layouts Tab

** To make **Mass Changes**, you can send information out to Excel, change in Excel and then use the Import tool to pull the updated information back in to DonorSnap (last page) **



Organizing Contacts

Inactivating Contacts

- Create a policy for what defined “inactive” (for example, when a contact is deceased, asked to be removed from the database, has not donated in a certain number of years)
- On the **Contact** screen is the *Active* box. Simply **UN**-check to *Inactivate*.
- Under **Community > Contacts**, the list will automatically display the Active Contacts. In the top left of the grid, in the **Status**, change this to **Inactive or All**, to view inactivated contacts.

Deleting Contacts

- Duplicates where One of the records has NO activity (no donations or interactions or notes, etc.), you can delete one of the records
- **** Deleting a Contact will remove all Donations, Notes, Interactions, etc. with one click. Be Careful.**

Merging Contacts

- When you have duplicates where BOTH records have “activity” (donations, interactions, notes, etc.), you must merge the records together.
- Run the Duplicates Report periodically, to search your database for duplicates in six different ways. **Reports > Administrative Reports > Duplicates Report.**
 - Print or Export to Excel to Save. You cannot merge duplicates directly from the Report.
- Perform the merge under **Maintenance > Merge Contact**
 - Choose the “Old” record to become Inactivated (DonorSnap will make this record **Inactive**)
 - Choose the “New” record to merge the old information in to
 - Choose the Contact information to be retained in the “New” record



DonorSnap
Donor Management Made Easy

Mass Updates (Excel Import tool)

The Excel Import tool allows you to make changes to any fields – Name fields, Attributes, ContactType, Appeals & Campaigns, etc. – on a mass basis, instead of having to change one record at a time.

- a. Create a DataMinerPlatinum report of the fields you want to change
 - i. You **MUST** include the **Relevant-IPK** field in your Export (necessary for the reimport, to go back to the same record)
- b. Export the report to Excel
- c. Make changes to your data in the Excel spreadsheet
- d. Save the report on your computer
- e. **Maintenance > Excel Import**
 - i. Choose to **Update Records** and **What Type** of Record
 - ii. Upload your spreadsheet, choose the DMP sheet
 - iii. Move through the tabs until finally **Load Data**
- f. Verify the results.
***Note that All Imports can be reversed.** If an error occurred with your import (such as putting all the phone numbers in the Email field), you can undo your import. Make Sure to verify your results!
- g. 5-minute Help Video: [Update Contact Information with Excel Import Tool](#)