DonorSnap On-Site App....

.....Responsive Forms for your iPad / iPhone
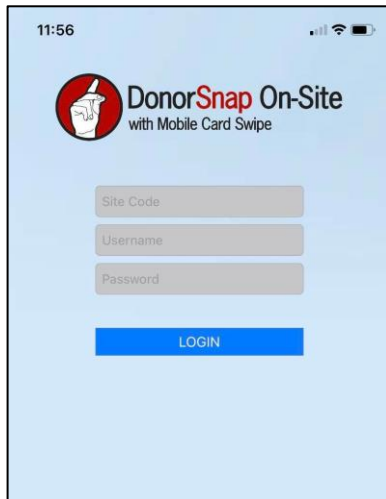
Build your Forms in DonorSnap

... Access them on your device for easy data entry!

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DonorSnap
Donor Management Made Easy

Select a Form

77 - 80s Flashback Sponsorship Form Example (Donation)

73 - Recurring Donation Form – do not delete (Donation)

9 - Volunteer Registration – do not delete (Contact)

6 - Tourney Event Registration – do not delete (Donation)

1 - Malaika Scholarship Campaign – do not delete (Donation)

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BACK   🔍 Contact Search

Sponsorship Level	>
I would like to additionally donate:	0.00
Amount	$0.00
Processing Fee %	✓

If Business, list Business name:

First Name

Last Name

Address1

City

State   >

Zip

E-Mail

Pay With Cash/Check

Pay With Card

Use your existing DonorSnap forms or build new forms under **Online Forms > Responsive Forms**.

Use the **Form Builder** tab to select the fields you want to include on your form, and the order of your fields.

The **Settings** tab has a menu of options on the left, for you to customize your Confirmation Emails. (Note, confirmation emails are sent instantly once a form is submitted, whether that's a payment form or volunteer hours form).

Online Forms can be embedded in your Website or emailed out. These would be more "Public" forms. A form sending to Nancy, for example, the contact, for her to fill out her information and make a credit card payment with. These can have images and text boxes of information; More graphically fancy so it looks appealing to the public.

DonorSnap On-Site is intended for You, as the user of DonorSnap, to have an iPad at the event to take payments as they come in. Because of this, we have removed all images, text boxes, and formatting of forms to allow for simple data-entry.   **Same form: Different views.**

With DonorSnap On-Site you can submit forms for payment, as Cash/Check, or swiping a Credit/Debit card. You can also submit any other form, such as Volunteer Hours, Event Registrations, Interaction forms etc.

When a Form is Submitted:

Just like responsive forms on your website, when a form is submitted, it arrives to your DonorSnap **Dashboard** as an "Open Record".

The Open Records app allows you to make any changes to the form submission before loading it in to your database.

On your dashboard, click **Add App** in the far right, choose "Responsive Forms Open Records"

Charging Credit/Debit Cards:

Create an account with goEmerchant. (this takes about a week to setup)

https://www.goemerchant.com/offers/partners-isv-donorsnap

or contact Kevin Wapner: kevin.wapner@first-american.net / (856) 546-3810

- ❖ On-Site is **one-time payments only**. No recurring Donations
- ❖ ACH payments are only available through online forms, not DonorSnap On-Site.
- ❖ There are no additional fees for swiping cards through DonorSnap On-site. It is the same processing fee whether using an online form or the On-Site App.

Order the Card Swiper through goEmerchant:

Magtek iDynamo 5

- ❖ Must use iPhone / iPad with a Lightning Port
- ❖ Does not use USB-C
- ❖ You can have multiple swipers
- ❖ $80 per swiping device
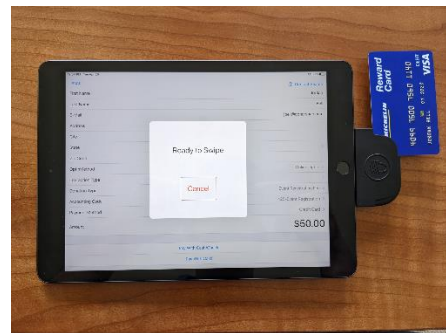
Integrating with goEmerchant

For new customers: Maintenance > Site Setup > Integrations

goEmerchant will send your account information in an email, to be entered here.

For existing customers, you need to Refresh your goEmerchant integration information. :

Once you setup your "retail account" with goEmerchant (ordering the card swiper), return to Maintenance > Site Setup > Integrations

Click the **Change Existing** button, and then click **Save** on the next screen. Don't type anything in or make any changes, just by clicking Change and Save, it will refresh your account details. *Note that if you do not do this step, the On-Site app will error on you, with these instructions, the first time you attempt to swipe a card.