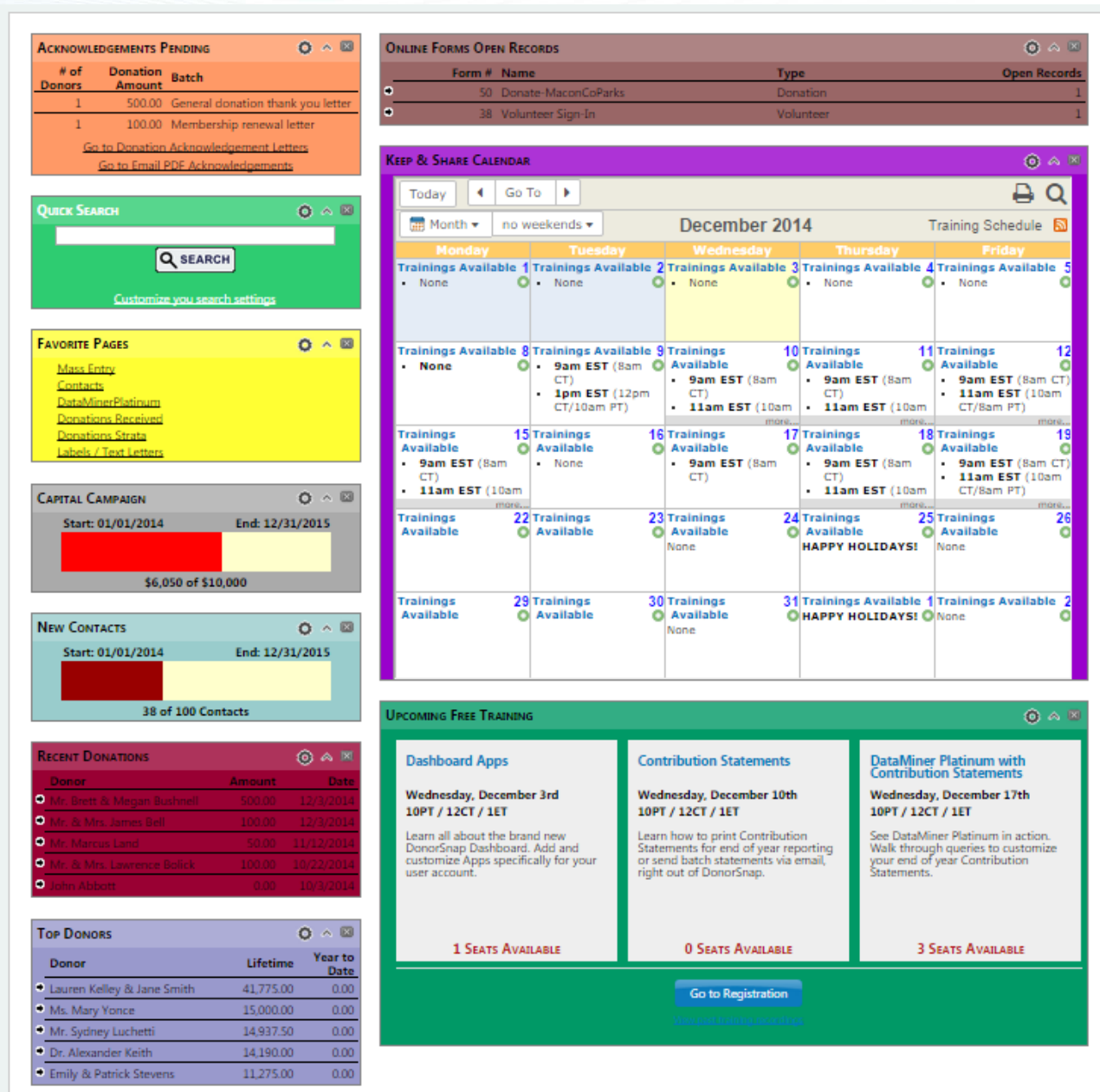


Dashboard Apps & Goals

DonorSnap's Dashboard is the **Home Page** of the program, the first page that appears when you log in to the program, which you can return to by clicking **Home** along the top menu.



ACKNOWLEDGEMENTS PENDING

# of Donors	Donation Amount	Batch
1	500.00	General donation thank you letter
1	100.00	Membership renewal letter

[Go to Donation Acknowledgement Letters](#)
[Go to Email PDF Acknowledgements](#)

QUICK SEARCH

SEARCH

[Customize your search settings](#)

FAVORITE PAGES

- [Mass Entry](#)
- [Contacts](#)
- [DataMiner Platinum](#)
- [Donations Received](#)
- [Donations Strata](#)
- [Labels / Text Letters](#)

CAPITAL CAMPAIGN

Start: 01/01/2014 End: 12/31/2015

\$6,050 of \$10,000

NEW CONTACTS

Start: 01/01/2014 End: 12/31/2015

38 of 100 Contacts

RECENT DONATIONS

Donor	Amount	Date
Mr. Brett & Megan Bushnell	500.00	12/3/2014
Mr. & Mrs. James Bell	100.00	12/3/2014
Mr. Marcus Land	50.00	11/12/2014
Mr. & Mrs. Lawrence Bolick	100.00	10/22/2014
John Abbott	0.00	10/3/2014

TOP DONORS

Donor	Lifetime	Year to Date
Lauren Kelley & Jane Smith	41,775.00	0.00
Ms. Mary Yonce	15,000.00	0.00
Mr. Sydney Luchetti	14,937.50	0.00
Dr. Alexander Keith	14,190.00	0.00
Emily & Patrick Stevens	11,275.00	0.00

ONLINE FORMS OPEN RECORDS

Form #	Name	Type	Open Records
50	Donate-MaconCoParks	Donation	1
38	Volunteer Sign-In	Volunteer	1

KEEP & SHARE CALENDAR

Today Go To

Month no weekends December 2014 Training Schedule

Monday	Tuesday	Wednesday	Thursday	Friday
Trainings Available 1 • None	Trainings Available 2 • None	Trainings Available 3 • None	Trainings Available 4 • None	Trainings Available 5 • None
Trainings Available 8 • None	Trainings Available 9 • 9am EST (8am CT) • 1pm EST (12pm CT/10am PT)	Trainings Available 10 • 9am EST (8am CT) • 11am EST (10am CT)	Trainings Available 11 • 9am EST (8am CT) • 11am EST (10am CT/8am PT)	Trainings Available 12 • 9am EST (8am CT) • 11am EST (10am CT/8am PT)
Trainings Available 15 • 9am EST (8am CT) • 11am EST (10am CT)	Trainings Available 16 • None	Trainings Available 17 • 9am EST (8am CT)	Trainings Available 18 • 9am EST (8am CT) • 11am EST (10am CT/8am PT)	Trainings Available 19 • 9am EST (8am CT) • 11am EST (10am CT/8am PT)
Trainings Available 22	Trainings Available 23	Trainings Available 24 None	Trainings Available 25 HAPPY HOLIDAYS!	Trainings Available 26 None
Trainings Available 29	Trainings Available 30	Trainings Available 31 None	Trainings Available 1 HAPPY HOLIDAYS!	Trainings Available 2 None

UPCOMING FREE TRAINING

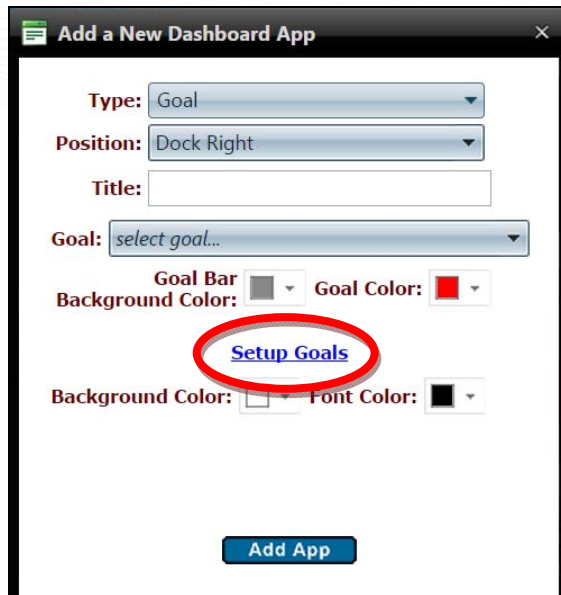
Dashboard Apps	Contribution Statements	DataMiner Platinum with Contribution Statements
Wednesday, December 3rd 10PT / 12CT / 1ET Learn all about the brand new DonorSnap Dashboard. Add and customize Apps specifically for your user account. 1 SEATS AVAILABLE	Wednesday, December 10th 10PT / 12CT / 1ET Learn how to print Contribution Statements for end of year reporting or send batch statements via email, right out of DonorSnap. 0 SEATS AVAILABLE	Wednesday, December 17th 10PT / 12CT / 1ET See DataMiner Platinum in action. Walk through queries to customize your end of year Contribution Statements. 3 SEATS AVAILABLE

[Go to Registration](#)

- Remember that Dashboard apps are **specific to the user**. Each user at your organization can have their own apps, customize the colors and order of their apps; each user can have different goals on their Dashboard.

Setting Up Goals

When you **Add App > Goals**, customize the look & feel of the app here. You must also **Setup Goals**, to create the goal attached to the visible App.



Add a New Dashboard App

Type: Goal

Position: Dock Right

Title:

Goal: select goal...

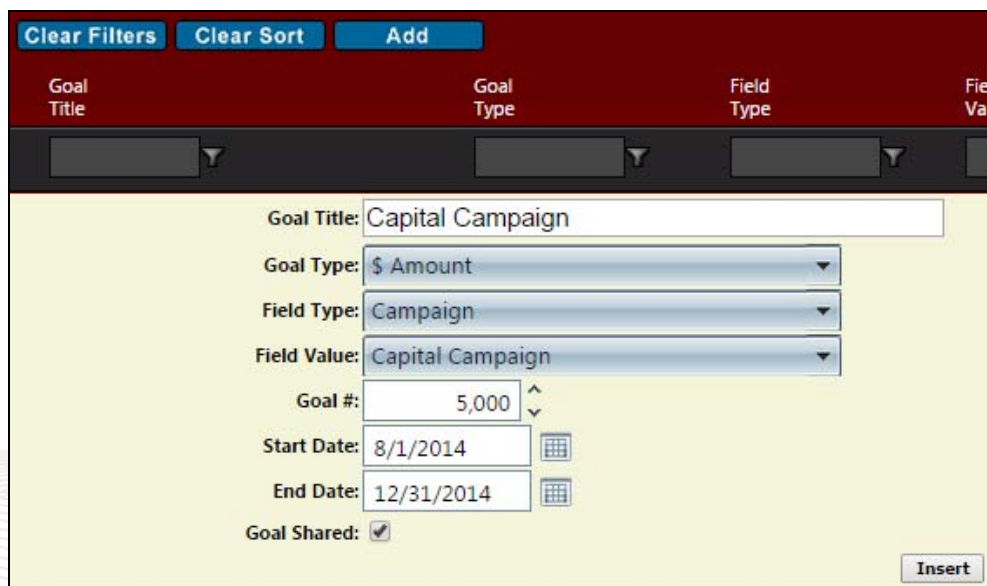
Goal Bar Background Color:  Goal Color: 

[Setup Goals](#)

Background Color:  Font Color: 

Add App

Set up goals based on Contacts, Donations, Interactions or Volunteers (such as how is my Capital Campaign doing or how many volunteer hours have been put in at the Front desk). You can have multiple Goals visible on your Dashboard.



Clear Filters Clear Sort Add

Goal Title	Goal Type	Field Type	Field Value
Goal Title: Capital Campaign	Goal Type: \$ Amount	Field Type: Campaign	Field Value: Capital Campaign
Goal #: 5,000	Start Date: 8/1/2014	End Date: 12/31/2014	Goal Shared: ☒

Insert

Campaign Goals

Set Up a goal based on a particular Campaign.

- Title your goal
- **Type:** Tracking the amount of money raised (\$ Amount)
- **Field Type:** Pulling from the Campaign field
- **Field Value:** Select the desired campaign
- Set the date-range (or leave blank) and dollar amount expected
- **Goal Shared** means that other users can also set up a Goal App based on this goal (if you un-check the box, only you can create a Goal App for this Goal)

Goal Title:	Capital Campaign	
Goal Type:	\$ Amount	
Field Type:	Campaign	
Field Value:	Capital Campaign	
Goal #:	5,000	^ v
Start Date:	8/1/2014	📅
End Date:	12/31/2015	📅
Goal Shared:	☒	

[Update](#)

Then set the App title and colors for how the goal will display on your Dashboard:

Add a New Dashboard App

Type:	Goal	
Position:	Dock Right	
Title:	Capital Campaign	
Goal:	Capital Campaign	
Goal Bar Background Color:		Goal Color:
Setup Goals		
Background Color:		Font Color:

[Add App](#)

Events Goals (donations received to a specific appeal or campaign)

Set Up a goal based on a particular Appeal (which is where most organizations track Events; or use the Campaign code if you use that field).

- Title your goal
- **Type:** Tracking the amount of money collected (\$ Amount)
- **Field Type:** Pulling from the Appeal (or campaign) field
- **Field Value:** Select the desired Appeal (or campaign)
- Set the date-range (or leave blank) and dollar amount expected
- **Goal Shared** means that other users can also set up a Goal App based on this goal (if you un-check the box, only you can create a Goal App for this Goal)

Then set the App title and colors for how the goal will display on your Dashboard:

Goal Title:

Goal Type:

Field Type:

Field Value:

Goal #:

Start Date:

End Date:

Goal Shared: ☒

Edit Dashboard App

Type:

Title:

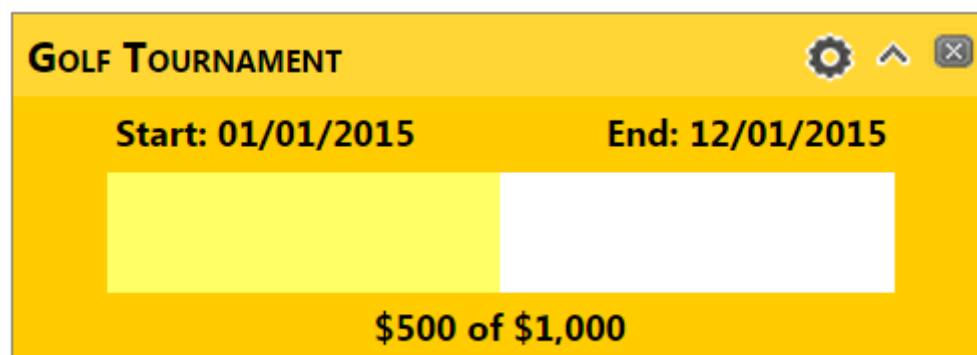
Goal:

Goal Bar: ☐ Goal Color:

Background Color: Font Color:

[Setup Goals](#)

Remember, your dashboard can display multiple goals; consider changing the colors for different apps to distinguish them from each other on the Dashboard.



Interaction Goals

Set Up goals based on Interactions tracked by your organization (such as how many RSVP's to an upcoming event or how many fundraising phone-calls you've made).

- Title your goal
- **Type:** Tracking the amount of hours completed(\$ of Volunteer Hours)
- **Field Type:** Pulling from the Volunteer [Event] Code
- **Field Value:** Select the desired Volunteer event
- Set the date-range (or leave blank) and # of hours expected
- **Goal Shared** means that other users can also set up a Goal App based on this goal (if you un-check the box, only you can create a Goal App for this Goal)

Goal Title: Personal Touches

Goal Type: # of Interactions

Field Type: Interaction Code

Field Value: Personal Contact

Goal #: 10

Start Date: 1/1/2014

End Date: 12/31/2015

Goal Shared: ☐

Then set the App title and colors for how the goal will display on your Dashboard:

Edit Dashboard App

Type: Goal

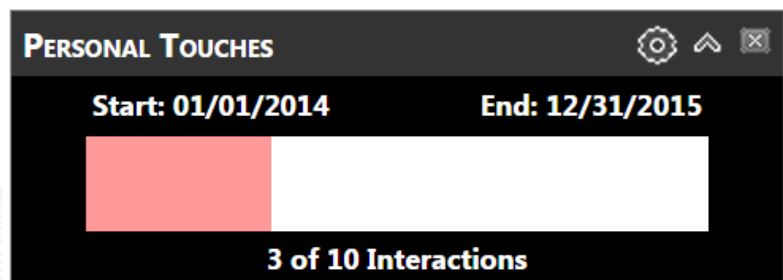
Title: Personal Touches

Goal: Personal Touches

Goal Bar Background Color: ☐ **Goal Color:** ☐

[Setup Goals](#)

Background Color: ☐ **Font Color:** ☐

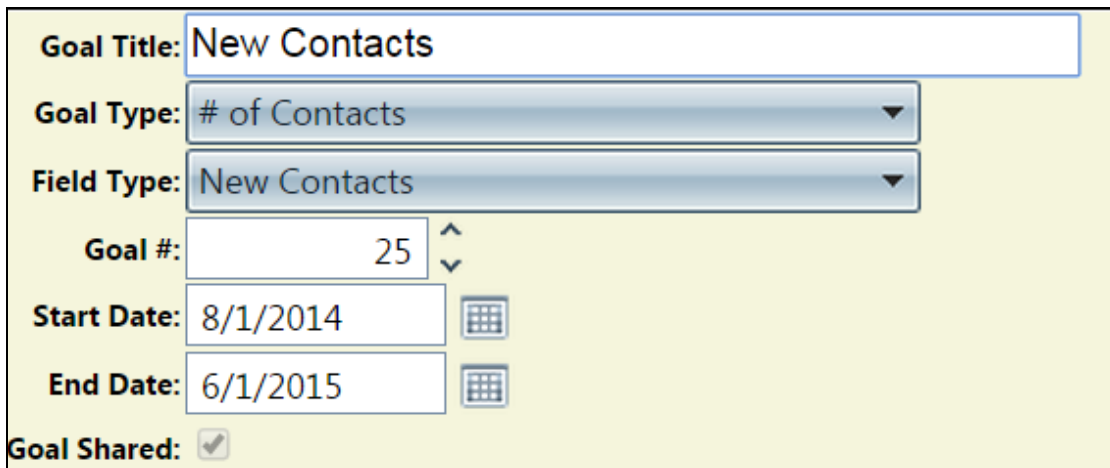


NEW Contacts Goals

Set up goals to track NEW contacts added to your database.

This is not a goal for new “donors”, this is just New contacts all together.

- Title your goal
- **Type:** Tracking the number of Contacts (# of Contacts)
- **Field Type:** New Contacts (which pulls the **OriginationDate**, the date you entered the contact in to DonorSnap) from the Contact screen
- Set the Goal Number and Date-Range (or leave the dates blank, or enter just a start date)
- **Goal Shared** means that other users can also set up a Goal App based on this goal (if you un-check the box, only you can create a Goal App for this Goal)



Goal Title:

Goal Type:

Field Type:

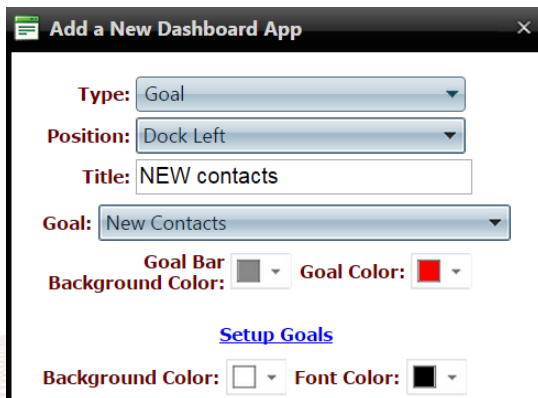
Goal #:

Start Date:

End Date:

Goal Shared: ☒

Then set the App title and colors for how the goal will display on your Dashboard:



Add a New Dashboard App

Type:

Position:

Title:

Goal:

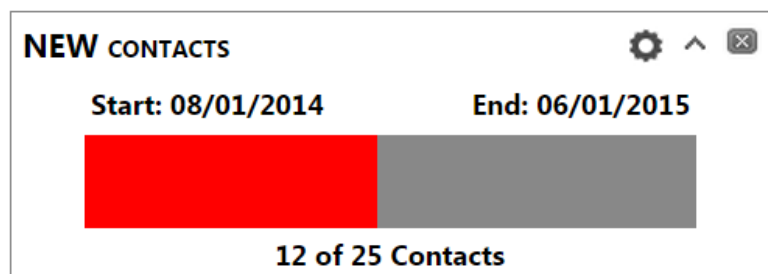
Goal Bar Background Color:

Goal Color:

[Setup Goals](#)

Background Color:

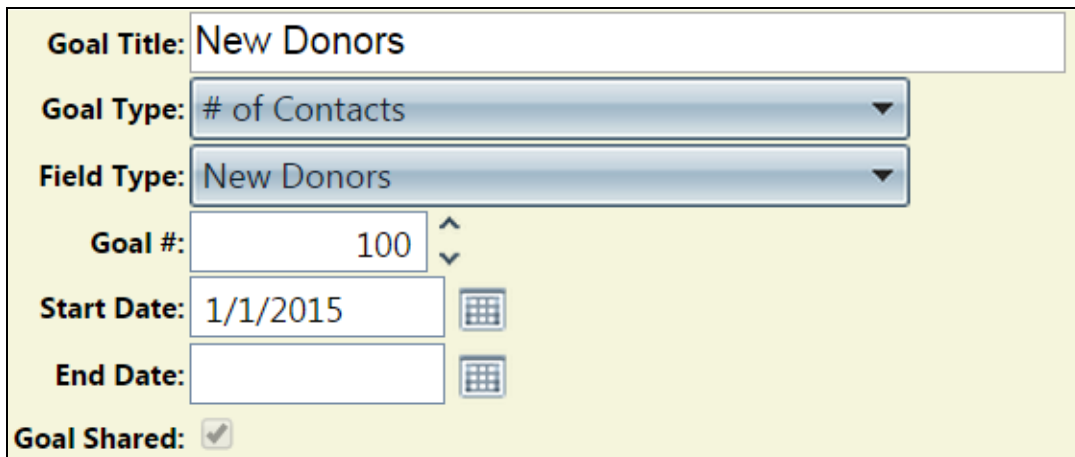
Font Color:



NEW Donors Goals

Set up goals to track NEW donors and payments made. This is not a goal for new contacts in your database; those in this goal might have been on your mailing list for years, but they just recently became a DONOR.

- Title your goal
- **Type:** Counting Contacts (# of Contacts)
- **Field Type:** New Donors (which pulls the Date of First Donation)
- Set the desired number of new Donors and the date-range (or leave dates blank, or set just a start or end date)
- **Goal Shared** means that other users can also set up a Goal App based on this goal (if you un-check the box, only you can create a Goal App for this Goal)



Goal Title:

Goal Type:

Field Type:

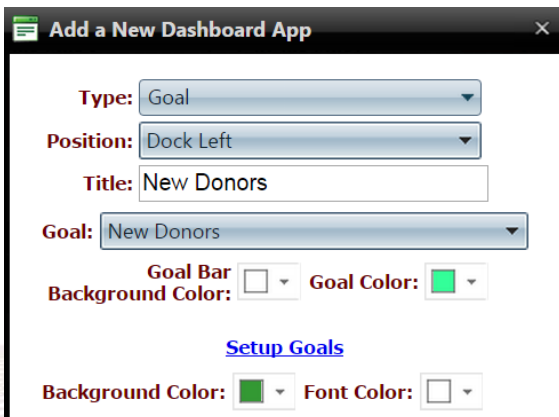
Goal #:

Start Date:

End Date:

Goal Shared: ☒

Then set the App title and colors for how the goal will display on your Dashboard:



Add a New Dashboard App

Type:

Position:

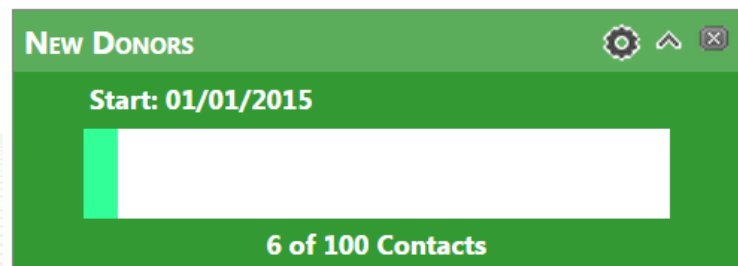
Title:

Goal:

Goal Bar: ☐ Goal Color:

Background Color: Font Color:

[Setup Goals](#)



Volunteer HOURS Goals

Set Up goals to track how many volunteer hours have been completed.

Often Grants will require that X amount of hours were collected for a particular program. This is a great way to track your progress.

- Title your goal
- **Type:** Tracking the amount of hours completed(\$ of Volunteer Hours)
- **Field Type:** Pulling from the Volunteer [Event] Code
- **Field Value:** Select the desired Volunteer event
- Set the date-range(or leave blank) and # of hours expected
- **Goal Shared** means that other users can also set up a Goal App based on this goal (if you un-check the box, only you can create a Goal App for this Goal)

Goal Title: Classroom Hours

Goal Type: # of Volunteer Hours

Field Type: Volunteer Code

Field Value: Classroom Help

Goal #: 100

Start Date:

End Date:

Goal Shared: ☐

Then set the App title and colors for how the goal will display on your Dashboard:

Edit Dashboard App

Type: Goal

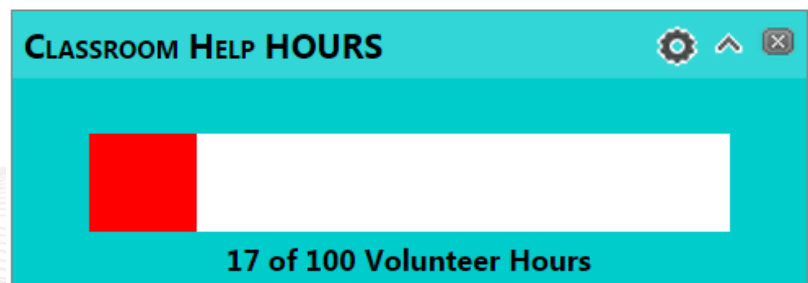
Title: Classroom Help HOURS

Goal: Classroom Hours

Goal Bar Background Color: ☐ **Goal Color:** ☐

[Setup Goals](#)

Background Color: ☐ **Font Color:** ☐



Volunteer Sign-Ups Goals

Set up a Goal to track the number of Sign-ups to a Volunteer Event.

If you track sign-ups for a future event, this is a great way to see how you're doing on registrations (how close are you getting to the 15 people you need for the event?)

- Title your goal
- **Type:** Tracking the number of sign-ups (\$ of Volunteer Activities)
- **Field Type:** Pulling from the Volunteer [Event] Code
- **Field Value:** Select the desired Volunteer event
- Set the date-range (or leave blank) and # of sign-ups expected
- **Goal Shared** means that other users can also set up a Goal App based on this goal (if you un-check the box, only you can create a Goal App for this Goal)

Goal Title:	Classroom Sign-Ups	
Goal Type:	# of Volunteer Activities	
Field Type:	Volunteer Code	
Field Value:	Classroom Help	
Goal #:	15	^ v
Start Date:		
End Date:		
Goal Shared:	☐	

Then set the App title and colors for how the goal will display on your Dashboard:

Edit Dashboard App

Type: Goal

Title: Classroom Sign-Ups

Goal: Classroom Sign-Ups

Goal Bar Background Color:

Goal Color:

Setup Goals

Background Color:

Font Color:

