Nonprofit CRM & Fundraising Software

DonorSnap
Donor Management Made Easy



A real nonprofit CRM with a dedicated team behind it. Clear pricing based on the size of your database, powerful tools, and top-notch customer support, all at an affordable price point.

sales@donorsnap.com
www.donorsnap.com

Product Overview

DonorSnap
Donor Management Made Easy



COLLABORATE

DonorSnap offers unlimited users and cloud-based access, enabling your entire team to work together effortlessly. With an internet connection, anyone can log in to update records, ensuring your data is always up-to-date and accessible.



COMMUNICATE

Launch multichannel fundraising campaigns with ease. Reach your donors through email, text, and print, and use custom mailing lists to deliver personalized messages that resonate.



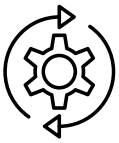
COLLECT

Simplify donation processing with DonorSnap's Stripe integration. Whether through responsive online forms or the Onsite app for in-person contributions, collecting gifts has never been more convenient.



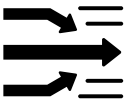
VISUALIZE

Gain instant insights with a customizable dashboard that highlights your most important metrics. For deeper analysis, use built-in reports or the advanced query tool to uncover trends and make data-driven decisions.



AUTOMATE

Stay connected and efficient with automated reminders, scheduled reports, and task notifications that keep your team on track. On the Pro plan, the Automated Task Manager adds date-triggered email campaigns for birthdays, renewals, and lapsed donors.



STREAMLINE

Save time and reduce effort with DonorSnap's powerful tools. From batch donation entry to seamless integrations with your favorite platforms, you'll boost efficiency while lowering operational costs.



RETAIN

Strengthen donor relationships with features designed to keep supporters engaged. Identify lapsed donors with LYBUNT reports, set up re-engagement campaigns, and encourage recurring gifts to secure steady funding for your mission.

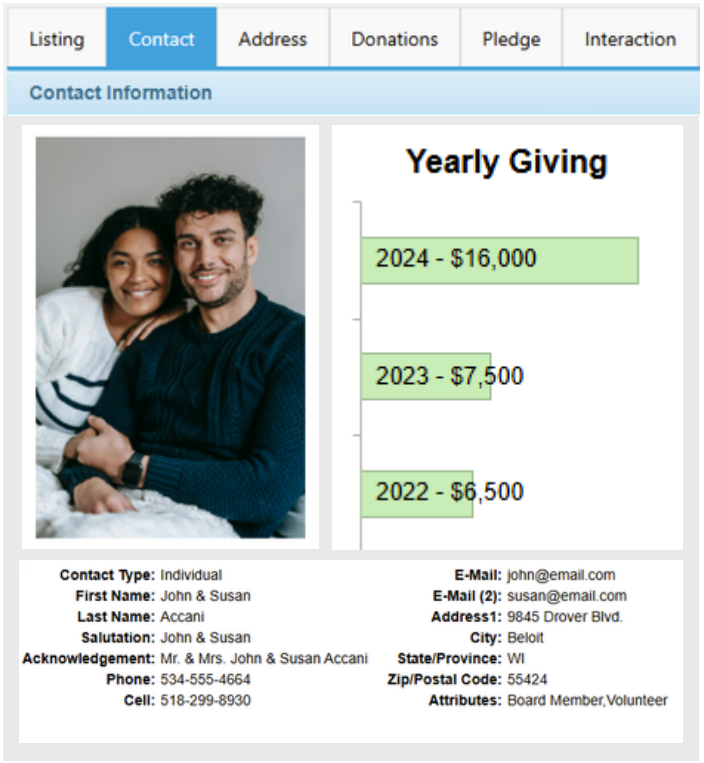
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Product Overview

DonorSnap
Donor Management Made Easy

Donation Management & Fundraising:

Easily manage donations and contacts in one place, allowing you to create personalized campaigns tailored to unique donor segments. Track giving history and engagement to launch targeted print, email, and text campaigns. Build custom donation forms with our Stripe-integrated forms, automate acknowledgments via mail or email, and monitor progress with dashboards and reports. Plus, our annual free NCOA cleaning helps reduce returned mail waste.



Support & Training:

As a DonorSnap client, you can count on our support team. We've done our best to create an intuitive, easy to use donor management software system, but we cover any remaining gaps with outstanding support. Not everyone is well-versed in database speak, and they shouldn't have to be! We'll help you learn how to build custom reports, tweak your online donation forms, adjust your thank you letters, and answer all your donor management software questions.

Data & Security:

Our system ensures comprehensive data security with daily on-site and off-site data backups, complemented by cloud storage across multiple secure locations. The server is professionally hosted and secured in a top-tier data center, with SSL site security safeguarding all online interactions. Access is protected through password, site ID, and user ID login requirements. Additionally, user-controlled access permissions allow for tailored control over each module, including options for no access, read-only, or read/write privileges. Two-factor authentication and 12 character password requirements are also available for organizations that choose to activate them.

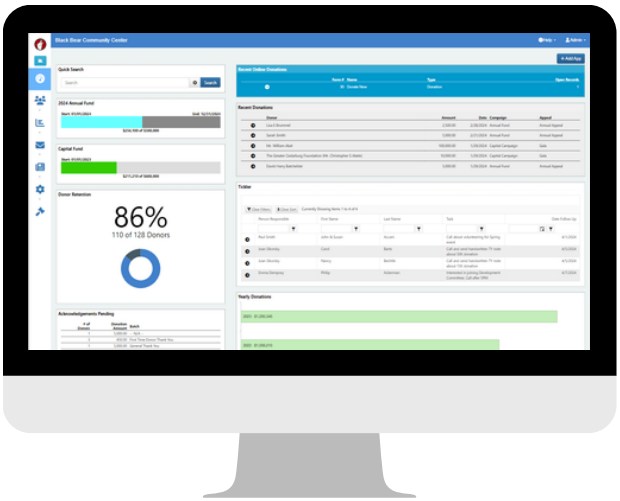
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Product Overview

DonorSnap
Donor Management Made Easy

Reporting and Insights:

Understand your data at a deeper level so that you can improve your fundraising and engagement. DonorSnap makes it easy for beginners using canned reports that are easily customized. Power users will gravitate towards the query tools to write advanced custom reports. All users are able to set up a custom dashboard to see a snapshot of the most relevant data for their role.



Contact & Relationship Management:

DonorSnap gives you a full picture of every supporter in one record. Track individuals and households, multiple and seasonal addresses, and the relationships between contacts. Record membership levels and renewal dates, volunteer hours and interests, and every interaction, from site visits to event attendance. Moves management tools help your team cultivate prospects and major donors, and user-defined fields let you track anything specific to your organization.

Integrations:

DonorSnap connects with the tools your nonprofit already uses. Stripe makes credit card processing and reconciliation simple, and our QuickBooks Online and Desktop integration keeps your accounting in sync. Send email campaigns through Constant Contact and text messages through Twilio. EventSnap and AuctionSnap also integrate directly with DonorSnap for event registration, ticketing, and auctions.

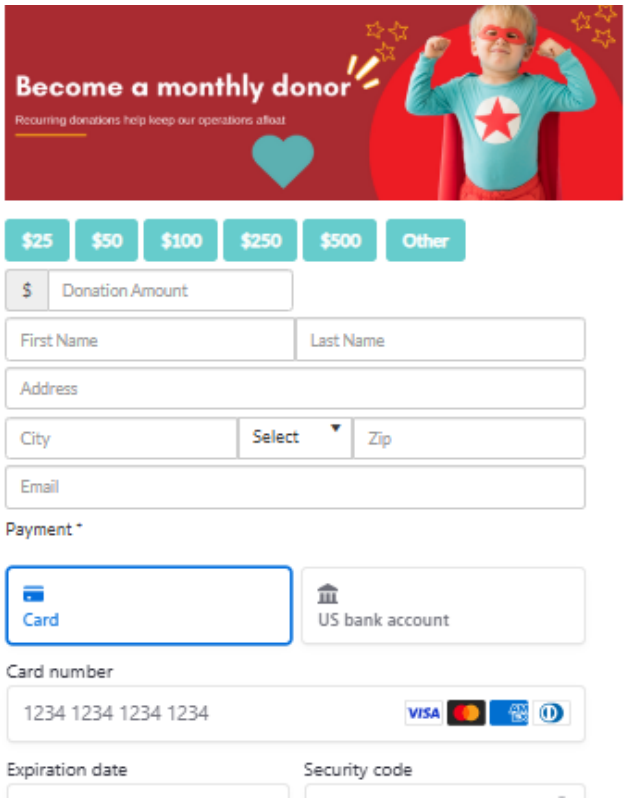
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Top Features

Online Donations & Responsive Forms

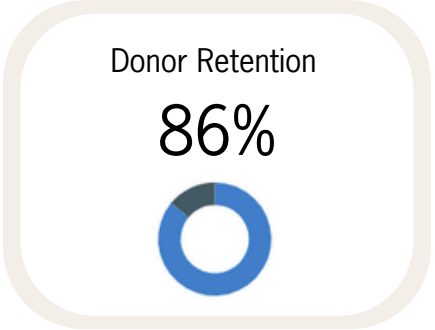
The online forms tool makes it easy to create customized forms for collecting online donations, event registrations, updated contact information, volunteer sign-ups, and other data your organization needs to gather. Each organization can create and maintain an unlimited number of live forms simultaneously.

DonorSnap has partnered with Stripe to provide integrated online donation and registration payments, allowing you to accept credit cards, debit cards, ACH payments, as well as Google Pay and Apple Pay. This integration makes it easy to create customized donation forms, whether it's a "Donate Now" button for your website or a tailored fundraiser for a specific campaign.



Each form generates a unique, permanent hyperlink that remains the same even after updates. Simply provide this link to your website administrator for easy embedding or share it directly with your supporters via email. Once a donation is submitted, the data is held in a secure "Sandbox" area where you can review and approve submissions, ensuring the accuracy and cleanliness of your database.

Donor Retention & Recurring Giving



DonorSnap provides everything you need to strengthen donor relationships and improve retention. With tools to track retention trends and personalized, customizable communication options, your supporters will feel valued and motivated to continue giving.

Our online forms also include recurring giving options, proven to increase donor retention and overall contributions.

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Top Features

DonorSnap
Donor Management Made Easy

Standard Reporting

DonorSnap offers powerful reporting features that help nonprofits analyze their data and drive increased donations. The built-in reports are user-friendly, making it easy for beginners to access the insights they need quickly.

With over 30 standard reports available, generating key insights is just a few simple steps away. Most reports can be exported to Excel for deeper analysis and scheduled for weekly or monthly email delivery, keeping your team informed and on track.

Some of our most popular reports include:

Donations Received: Quickly view all donations made within a selected time period. This report is your essential tool for tracking received payments at a glance.

Contribution Statements: Generate itemized giving summaries for each donor within a specified period. Perfect for year-end tax statements or personalized donor acknowledgments.

Top Donors Report: Identify and rank your top contributors by giving totals. Easily spot your most impactful donors, including ties for the last ranked spot.

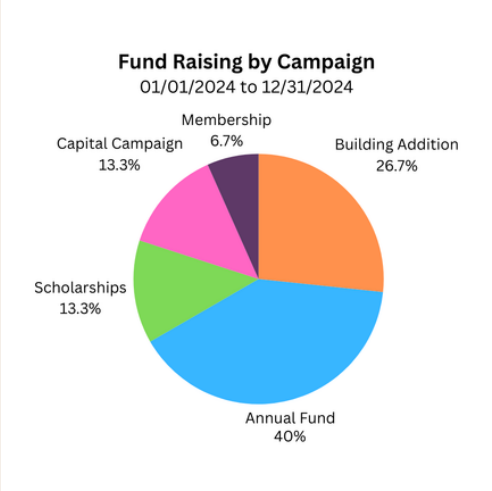
Donation Strata: Analyze giving history by donor levels (e.g., $5,000+, $1,000–$5,000, etc.). Gain a clear view of your donor base's contribution tiers.

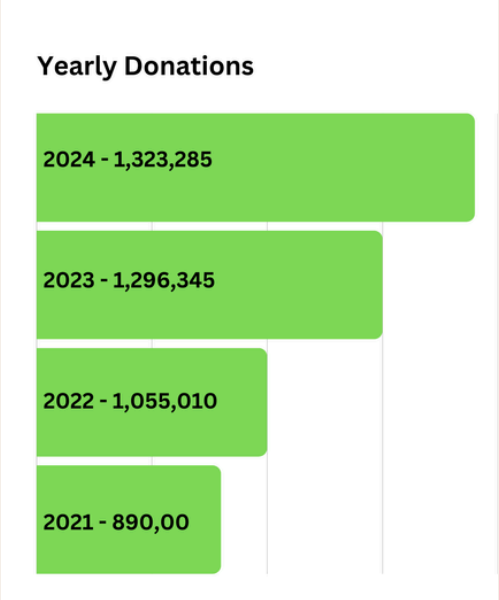
Periodic Comparison: Export detailed donation trends over multiple periods to Excel. Organize data by donor, campaign, or appeal for deeper insights.

LYBUNT Report: Spot lapsed donors with ease. This report highlights donors who gave "Last Year but Not This Year," including their last gift details, so you can re-engage them effectively.

Donor Retention: Measure donor loyalty with side-by-side comparisons of two periods, including the percentage of retained donors—critical for planning outreach strategies.

Stripe Payout Report: Simplify reconciliation with a detailed breakdown of Stripe payouts. See which donations make up each deposit, the associated fees, and consolidate all your Stripe accounts in one report.





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Top Features

DataMiner Platinum

In addition to our standard reports, we offer DataMiner Platinum, a powerful yet user-friendly query tool. It supports complex logic for advanced users while providing pre-built templates for easy use.

With DataMiner Platinum, you can:



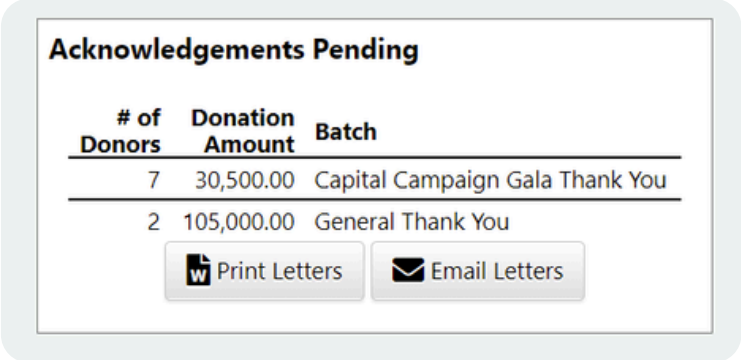
- Build targeted invitation lists based on donation history.
- Identify donors with significant giving changes.
- Generate donor recognition reports.
- Track upcoming tickler items by assignee.
- Analyze monthly volunteer activity.
- Manage membership renewals.
- Review recent interactions for a contact history overview.

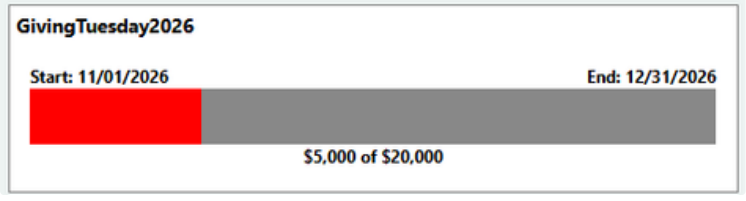
DataMiner Platinum makes advanced queries easy, helping you unlock the full potential of your fundraising data.

Custom Dashboards & Goals

Every DonorSnap user gets a personal dashboard built around the information they use most. Choose from dashboard apps that show recent donations, top donors, pledge summaries, and pending acknowledgements the moment you log in.

Set goals for fundraising campaigns, volunteer hours, and event participation, and watch your progress update as gifts come in.





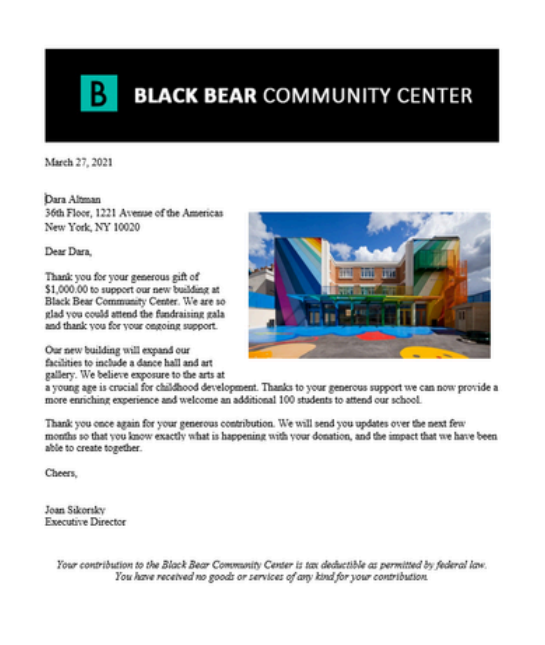
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Top Features

Acknowledgements & Tax Letters

Donor stewardship starts with a great thank-you. DonorSnap makes it easy to create and send personalized acknowledgments, ensuring every donor feels valued. Store and customize letters for any scenario—new donors, major gifts, memorial donations—and effortlessly assign them to each contribution. Print or email with ease, keeping gratitude meaningful and efficient.

For tax acknowledgements you have the option to include information in your thank you letter, or generate year-end contribution statements which provide a summary of all donations one has given for the year. This is especially helpful for recurring donors or donors who give more than once per year.



BLACK BEAR COMMUNITY CENTER

March 27, 2021

Dara Altman
36th Floor, 1221 Avenue of the Americas
New York, NY 10020

Dear Dara,

Thank you for your generous gift of $1,000.00 to support our new building at Black Bear Community Center. We are so glad you could attend the fundraising gala and thank you for your ongoing support.

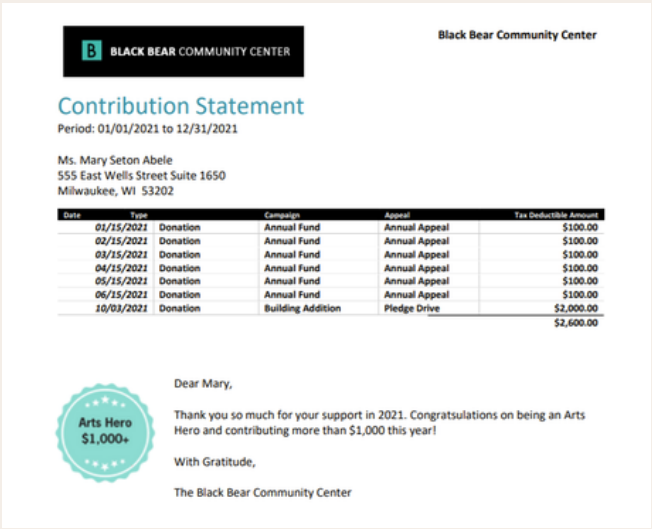
Our new building will expand our facilities to include a dance hall and art gallery. We believe exposure to the arts at a young age is crucial for childhood development. Thanks to your generous support we can now provide a more enriching experience and welcome an additional 100 students to attend our school.

Thank you once again for your generous contribution. We will send you updates over the next few months so that you know exactly what is happening with your donation, and the impact that we have been able to create together.

Cheers,

Joan Sikorsky
Executive Director

Your contribution to the Black Bear Community Center is tax deductible as permitted by federal law. You have received no goods or services of any kind for your contribution.



BLACK BEAR COMMUNITY CENTER

Black Bear Community Center

Contribution Statement
Period: 01/01/2021 to 12/31/2021

Ms. Mary Seton Abele
555 East Wells Street Suite 1650
Milwaukee, WI 53202

Date	Type	Campaign	Appeal	Tax Deductible Amount
01/15/2021	Donation	Annual Fund	Annual Appeal	$100.00
02/15/2021	Donation	Annual Fund	Annual Appeal	$100.00
03/15/2021	Donation	Annual Fund	Annual Appeal	$100.00
04/15/2021	Donation	Annual Fund	Annual Appeal	$100.00
05/15/2021	Donation	Annual Fund	Annual Appeal	$100.00
06/15/2021	Donation	Annual Fund	Annual Appeal	$100.00
10/03/2021	Donation	Building Addition	Pledge Drive	$2,000.00
				$2,600.00

Arts Hero
$1,000+

Dear Mary,

Thank you so much for your support in 2021. Congratsulations on being an Arts Hero and contributing more than $1,000 this year!

With Gratitude,

The Black Bear Community Center

Excel Import

The Excel import feature allows you to quickly and easily add new data to DonorSnap. With step-by-step guidance, the tool walks you through the process of importing an Excel spreadsheet and maps the data to the appropriate fields in DonorSnap. This feature is ideal for mass importing donations or member billings, or uploading automated sign-up information from your website.

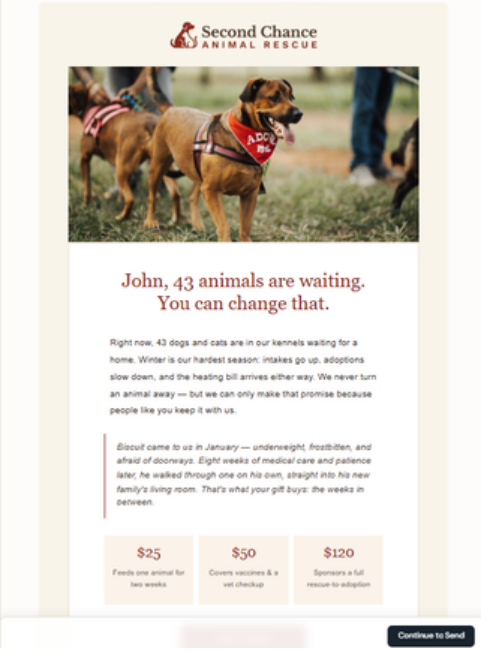
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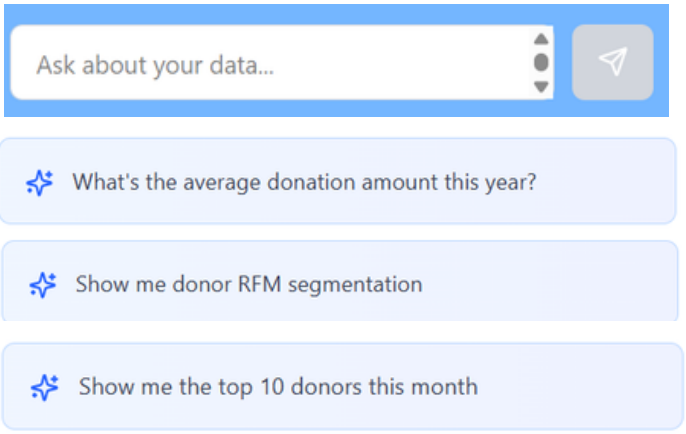
Pro Plan Features

DonorSnap
Donor Management Made Easy

Mass Email Campaign Studio

Design and send professional email campaigns without leaving DonorSnap. Campaign Studio connects directly to your donor data, letting you send to any segment of your database and personalize every message with merge fields. Templates are built to display correctly across all major email providers, including Outlook, and images are stored right inside the studio. Before you send, a built-in check flags common issues like a button without a link, so every campaign goes out with confidence.





DonorSnap Analytics

DonorSnap Analytics brings AI-powered insights to your fundraising data. Ask questions about your data, uncover trends, and build customized dashboards in minutes. RFM reporting scores donors on recency, frequency, and giving amount, helping your team spot your most engaged supporters and those who may need attention.

Automated Task Manager

The Automated Task Manager sends emails triggered by dates in your database, keeping supporters engaged while reducing your team's workload. Welcome first-time donors with a series of emails, remind members before their memberships expire, send birthday messages, follow up with lapsed donors, and send pledge payment reminders, all on autopilot.

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Event Management Suite

DonorSnap
Donor Management Made Easy

EventSnap & AuctionSnap

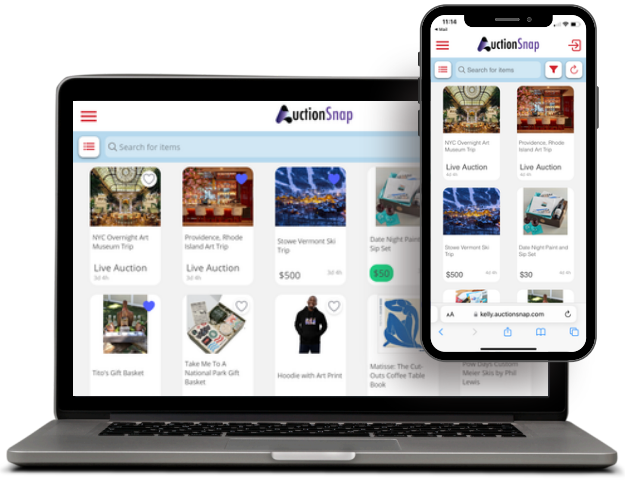
Your events deserve tools as capable as your CRM. Alongside DonorSnap, we offer EventSnap and AuctionSnap, two event products built for nonprofits that connect directly with your donor database.

EventSnap:

Event Registration & Ticketing

EventSnap handles everything from promotion to check-in. Build a branded event page, then sell single tickets, group registrations, VIP packages, and sponsorships, with checkout add-ons like raffle tickets, meal upgrades, and donations. Table management keeps galas and golf outings organized, and mobile check-in handles arrivals and walk-up sales at the door.





AuctionSnap:

Auction Management

AuctionSnap runs silent and live auctions in person, online, or hybrid. Guests bid from their phones with no app download, and real-time updates keep the competition going. Paddle raises and fund-a-need campaigns capture bigger gifts in the room, and winners check out securely from their phones when bidding closes

Better Together with DonorSnap

EventSnap and AuctionSnap integrate directly with DonorSnap. You can build guest lists from your existing supporters, then bring attendees, auction winners, and transactions back into DonorSnap after the event. That way, every ticket and winning bid becomes part of a supporter's giving history.

EventSnap and AuctionSnap are available individually or as a bundle, and both are included in the DonorSnap Complete plan.

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Comprehensive Features Breakdown

DonorSnap
Donor Management Made Easy

Contact Management

- **Detailed contact profiles, including:**
  - Comprehensive contact profile information
  - Two-household name resolution
  - Unlimited addresses and automated seasonal addresses
  - Quick membership status management
  - Classify and analyze contact types
  - Major donor monitoring tools
- **Full contact history:**
  - Notes history
  - Volunteer activity tracking
  - Affiliation and relationship tracking

Donation Management

- **Versatile donation tracking:**
  - Campaign and appeal classification
  - Soft credits and in-kind donations
  - Multi-fund analysis and recording
  - Donation recording, tracking, and analysis
- **Donation Entry**
  - Easy to access donation tab on each contact record
  - Mass entry tool for speeding up data entry
  - Excel Import/Export for mass updates or donations
- **Acknowledgment and Thank You tools:**
  - Email and printed acknowledgment letters
  - Multiple acknowledgment letter processing
  - Year-End Tax Statement reports for individual donors
- **Grant Tracking**
- **Pledge Tracking**
  - Set payment reminders
  - Pledge Aging Report
  - Pledge Forecasting Report

Online Donations & Recurring Giving

- Responsive forms tool with embed link for websites
- Customizable recurring giving options on online donation forms
- Recurring donation listing for easy review

Payment Processing

- **Stripe Integration: Accept payments directly through Stripe**
  - Simple signup process, start collecting online donations almost immediately
  - All donation information streams into DonorSnap
  - Donations deposited right to your bank account
  - Manage recurring payments in DonorSnap (cancel payments, change amount)
  - Stripe Portal offers tools like error logs
  - Competitive nonprofit rates
- **Payment Methods:**
  - Credit & Debit
  - ACH
  - Apple Pay & Google Pay
- Reconciliation Tools: Stripe Payout Report

Event and Auction Tools

- AuctionSnap Integration: Streamline auction management
- Onsite Card-Swipe Tool: Facilitate payments during live events
- Customized interaction and event tracking
- Event sign ups through responsive forms tool

Communication Tools

- Mass Email Campaign Studio*
- Constant Contact Integration
- Print campaign tools
  - Mail Merge Letters
  - Label generation
- Text Message capabilities with Twilio integration
- Automated Task Manager* to send timely emails (birthdays, upcoming expirations, etc.)
- Moves management capabilities for donor cultivation

*Pro Plan Feature

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Comprehensive Features Breakdown

DonorSnap
Donor Management Made Easy

Data & Security

- **Secure and reliable hosting:**
  - Hosted by a third-party national service with 99.95% uptime guarantee
  - 24/7 internet access
  - Data security measures, including site/password access controls, encryption, and multiple daily data backups to offsite storage
  - Two Factor Authentication and 12 character password settings
- **Unlimited User Access:**
  - Administrator and assigned user roles
  - Screen-level and field-level access controls
  - Group-specific access and permissions

Advanced Features

- **Integrated Tools:**
  - QuickBooks Desktop & QuickBooks Online
  - Constant Contact
  - Twilio for Text Message Campaigns
  - Stripe for Payment Processing
  - Online Donation Forms
  - Responsive Forms for Event Registrations/Volunteer Signup/Etc.
- **Data Management:**
  - Merge Contacts Tool to eliminate duplicates and consolidate records
  - Excel Import Tool for importing and updating contact, donation, and other data
  - Free NCOA cleaning every year
- **Automated Task Manager*, allowing automated email campaigns for:**
  - Membership renewal notifications
  - Lapsed donor campaigns
  - Happy Birthday messages
  - Pledge payment reminders
  - Welcome email series
  - Contact record updates

Reporting Tools:

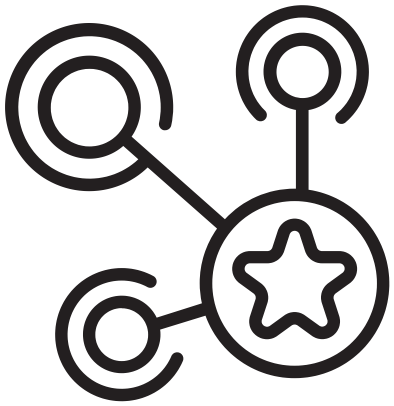
- Comprehensive set of standard reports with robust filtering options, Excel export, and screen previews
- DonorSnap Analytics* for AI powered reporting and dashboards
- DataMiner Query Tool for detailed or summarized data selection, Excel exports, and saved queries
- Customizable dashboard with goal tracking

Document Management

- Integrated document storage for easy access

Ease of Use

- **Customization Options:**
  - Fully customizable main screen
  - Create user-defined fields, including single-select dropdown lists, multi-select dropdown lists, text, date, and yes/no fields to track custom data
- **Guided Help:**
  - Online help system with screen-by-screen instructions and videos for key tasks
- **Training & Support**
  - Two free personalized training sessions to help you get started
  - Weekly live training webinars and comprehensive on-demand training videos
  - Email support included in every plan, option for paid phone support



*Pro Plan Feature

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Pricing

DonorSnap pricing is straightforward. Choose the plan that fits the way your organization works, and your price is set by the number of contacts in your database. Every plan is built on the same trusted donor management system and comes with our highly praised support and training.

Choose Your Plan

Basic

Starting at $68/month

Everythingyouneedto manage donors, take gifts, and say thank you.

- Contact, household, and membership management
- Online donations, recurring giving, and pledge tracking
- Acknowledgements and year-end tax statements
- Standard reports, dashboards, and custom query reports
- Stripe, QuickBooks, and Constant Contact integrations
- Text messaging, mail merge, and online forms
- Email support, two free trainings, and annual NCOA cleaning

Best Value

Pro

Starting at $108/month

Advanced tools plus hands-on help from our team every year.

Everything in Basic, plus:

- Mass Email Campaign Studio
- DonorSnap Analytics (AI-powered reporting)
- Advanced Dashboard
- Automated Task Manager
- NCOA cleaning 3 times a year
- Annual database audit
- One custom form built for you each year
- Year-end analysis

Complete

Starting at $1,966/year

Your donor CRMplusintegrated event and auction tools. Billed annually.

Everything in Pro, plus:

- EventSnap for event registration, ticketing, and attendee management
- AuctionSnap for in-person, online, and hybrid auctions
- Integrates directly with DonorSnap

What's Included?

Every DonorSnap plan includes unlimited users, email support, two free personalized trainings, weekly training webinars, and our full help library. Plus, your first 30 days are free!

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Pricing

DonorSnap
Donor Management Made Easy

Pricing by Number of Contacts

Number of Contacts	Basic		Pro		Complete
	Per Month	Per Year	Per Month	Per Year	Per Year
Up to 1,000	$68	$734	$108	$1,166	$1,966
Up to 2,500	$88	$950	$128	$1,382	$2,182
Up to 5,000	$108	$1,166	$148	$1,598	$2,398
Up to 10,000	$143	$1,544	$183	$1,976	$2,776
Up to 20,000	$218	$2,354	$258	$2,786	$3,586
Up to 30,000	$268	$2,894	$308	$3,326	$4,126

Site setup is $200 for all sites. This includes setup, 4 hours of data conversion, and private training. Annual pricing includes a 10% discount, and Complete is available with annual billing only. If you have over 30,000 records in your database, contact us for pricing.

Compare Plans

Feature	Basic	Pro	Complete
All core DonorSnap features	✓	✓	✓
Stripe, QuickBooks & Constant Contact integrations	✓	✓	✓
Email support & two free trainings	✓	✓	✓
NCOA address cleaning	1x per year	3x per year	3x per year
Mass Email Campaign Studio	–	✓	✓
DonorSnap Analytics (AI-powered reporting)	–	✓	✓
Advanced Dashboard	–	✓	✓
Automated Task Manager	–	✓	✓
Annual database audit	–	✓	✓
One custom form built for you each year	–	✓	✓
Year-end analysis	–	✓	✓
EventSnap & AuctionSnap	–	–	✓

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Next Steps?

DonorSnap
Donor Management Made Easy

What Happens When You Sign Up?

Whether you're converting your existing data or setting up a database for the first time, DonorSnap will support you every step of the way. From your data conversion to training and ongoing support, find out how you can count on us to make your new purchase work for you and your team.

1

Effortless Data Conversion

No matter where your data lives now, we will organize it and import it into your new database. When you sign up with us someone from our data team will reach out to you to get everything they need.

2

Personalized Training

When you sign up with DonorSnap you will receive two free one-on-one trainings. One to get you started, and then one after you have used the system and have specific questions.

3

Free Weekly Webinars

DonorSnap offers free weekly webinars to cover different topics about using our nonprofit CRM. All webinars are recorded and saved to our help library for easy access.

4

Ongoing Customer Support

Our support team is standing by to quickly answer any questions you have. In case that isn't enough for your organization, we also offer paid phone support.

Questions? Email Sales@donorsnap.com

Want to see a live demo? Visit
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