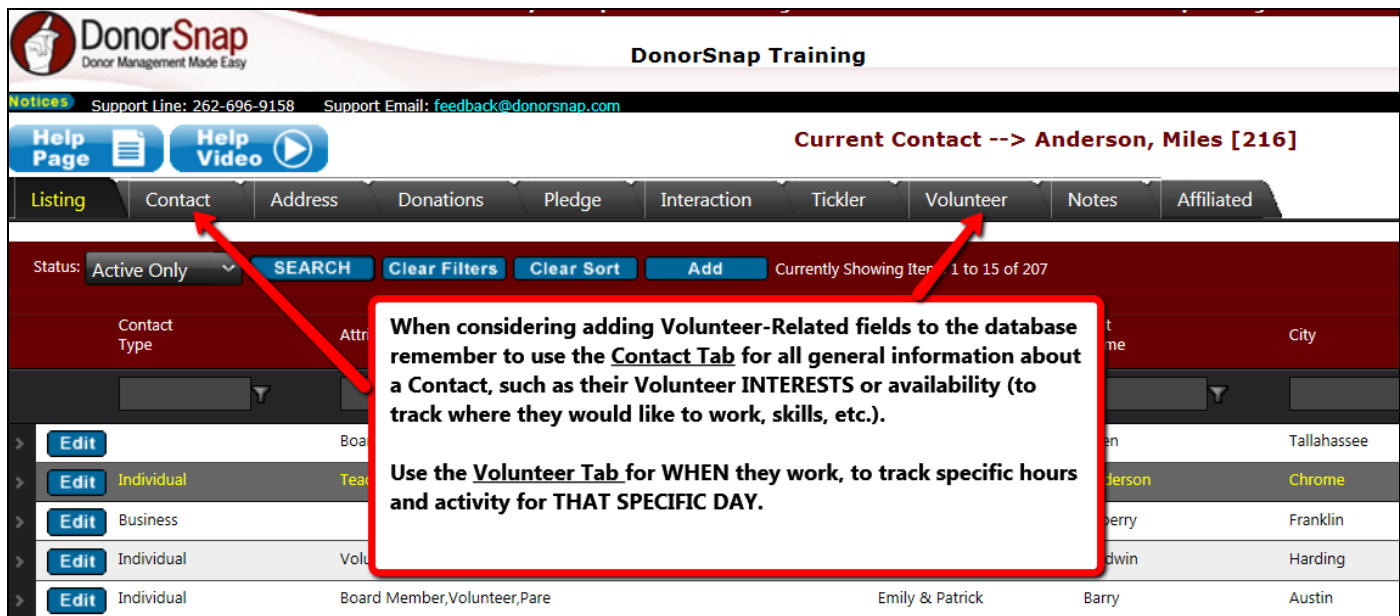


Building Volunteer Forms in DonorSnap

Online Forms is a module that comes installed with DonorSnap. You create your own forms.

Plan Your Form:

1. Write out your form ahead of time so you know what fields you require, to help you when it's time to build fields in DonorSnap. Do you already have a Volunteer Registration form printed out? Great! Use that as an example.
2. **Add any additional fields to the DonorSnap database.** All fields **MUST** be included in the database first, in order to add them to your form.



DonorSnap Training

Support Line: 262-696-9158 Support Email: feedback@donorsnap.com

Help Page Help Video

Current Contact --> Anderson, Miles [216]

Listing Contact Address Donations Pledge Interaction Tickler Volunteer Notes Affiliated

Status: Active Only SEARCH Clear Filters Clear Sort Add Currently Showing Items 1 to 15 of 207

Contact Type Attr

When considering adding Volunteer-Related fields to the database remember to use the Contact Tab for all general information about a Contact, such as their Volunteer INTERESTS or availability (to track where they would like to work, skills, etc.).

Use the Volunteer Tab for WHEN they work, to track specific hours and activity for THAT SPECIFIC DAY.

Contact Type	Attr	City
Individual	Tea	Tallahassee
Business		Chrome
Individual	Volu	Franklin
Individual	Board Member,Volunteer,Pare	Harding
	Emily & Patrick	Austin

Remember in DonorSnap, there are multiple tabs of information to track about a Contact.

Considering volunteers, use the **Contact** tab for information about that Contact, such as Volunteer Interests, Skills/Credentials, Availability. These are statements about the contact. When building online forms for Volunteer Registration (Sign up to Get involved with us!), you should create a **Contact Online Form**.

Use the **Volunteer Tab** to track location and hours worked for THAT DAY. Build **Volunteer Online Forms** for your volunteers to enter their own hours worked.



Building Volunteer Registration forms

Use this example of a form to help Volunteers register with your organization through an online form.

Volunteer

with Macon County Parks

Please complete the form below with your information.

Please read the liability and waiver and "Accept" the terms by checking the box before submitting your form.

First Name: *

Last Name: *

E-Mail: *

Cell: *

Where do you work?:

Work Phone:

Address1: *

State/Province: *

Zip/Postal Code: *

Desired Areas:: *

Availability:: *

EmergencyContact: *

VolunteerLiabilityStmnt:

AgreeToVolunteer:

* REQUIRED FIELDS

Thank you for your interest in volunteering with the Macon County Parks Foundation. You will be contacted about upcoming events and opportunities as needed. For additional information please email Jessica at Jessica@maconparks.org.

[Register to Volunteer](#)



DonorSnap

Donor Management Made Easy

Remember the first step is building all necessary fields in the database FIRST. Consider a volunteer walking in to your organization in person: how will you enter their volunteer registration manually? What fields does your organization require when tracking volunteers?

- Add fields to the **Contact** tab to indicate that the contact IS a volunteer (build an Attributes/Roles/Relationship type field)
- Add fields for **Volunteer Interests** and/or **Skills** (CPR-Certified or Licensed contractor)
- Consider fields for Emergency Contacts, Photo Releases, or other liability-related fields.

(Note that **not all users** need to see the Volunteer-Related fields on the Contact screen. Limit the screen layouts for each of your users so only the Director/Volunteer coordinator see the volunteer information, under **Maintenance > User-Setup**, choose the desired User, **Screen Layouts** tab)

Consider adding an "Attributes" field to indicate that this contact is a Volunteer (and/or any other roles within your organization).

Consider adding fields to the Contact tab to indicate VolunteerInterests or Availability. Remember all fields for your Online Form must be added to the database first.



DonorSnap

Donor Management Made Easy

Once all fields are added to the database, **Build Your Form**.

Online Forms > Standard Forms.

If you do not see Online Forms in your top-menu, your User-security has it disabled. Edit this under **Maintenance > User-Setup**, choose the desired User, **Rights** tab along the top.

Click the **Add** button.

Name your form: example, "VolunteerRegistration"

Choose the **Type** of form. Remember that most of your Registration-type information is on the **Contact** screen, and therefore you need a **Contact**-type form. **You do not need a Volunteer form** at this point, unless you are tracking volunteer hours.

Form #	Name	Type	Active
		NoFilter	NoFilter
	VolunteerRegistration	Contact	
		Donation	
		Interaction	
		Volunteer	
		Interaction with Payment	
		YogaRegistration	
	Fast Pitch Event	Interaction	Yes

Once your form is added, move through the tabs (Settings, Header/Footer, Fields, etc.) along the top to customize the look and feel of your form.

The **Settings** tab is used to customize the overall look of your form: change the fonts, color of the button, and upload your logo.

Allow Registration

Registration is for your online visitors to create an Account with the online forms (email and password). If you have multiple forms or if they will be visiting your website often, it might be nice that they do not have to enter their contact information each time.

As a DonorSnap administrator, when someone submits a form **You Decide what to do with the form**. You will be alerted that the form was submitted; now you decide.... Is the contact an existing contact in DonorSnap? If Yes, then add the form information to their existing record. If not, Add them as a new contact to the database.



DonorSnap

Donor Management Made Easy

If your guests register an account with the form, you only have to make the connection to their DonorSnap record the first time. All other form submissions will automatically link with their DonorSnap record, making your administrative process much easier.

Customize the **Header/Footer** text of your form.

Don't forget to Edit the name of your button (by default says "submit form")



DonorSnap

Donor Management Made Easy

Insert the **Fields** for your form by dragging from the list on the Left, to the box on the Right.
Drag fields up & down the list to change the order.

Required: A field is required for the guest to complete (Name, Cell phone, Address, etc.)

Read-Only: A field is visible but unchangeable (Releases, Liability, etc.)

Hidden: A field hidden from view, but will be submitted with the form. For example, all guests completing your "Volunteer Registration" form should be labeled as a Volunteer in your database. If you've added a field such as "Attributes", you can default this field to select "Volunteer" and hide the field. Now all forms submitted will have the contact labeled as a Volunteer in DonorSnap

Default Value: Insert a default value for a field or check-box (such as Attribute type)

List Options: If you created a drop-down field, choose which options are visible on the form.

Support Line: 262-696-9158 Support Email: feedback@donorsnap.com

Help Page Help Video

Create/Edit Online Forms
Current Form --> 37 - VolunteerRegistration (Contact)

Forms Listing Settings Header/Footer **Fields** Fields Tab Review Open Records Process Records User Logins

Note: Form Fields can not be changed when open records for the form exist.

Save Cancel Changes

DonorSnap Title	Req'd	Hide	Read Only	Title	Default Value	List Options
(Contact) Address Type	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Attributes	All items checked	Volunteer
(Contact) Address2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	First Name		
(Contact) Address3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Last Name		
(Contact) Anniversary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	E-Mail		
(Contact) Birthdate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cell		
(Contact) Cell 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Where do you work?		
(Contact) Child Name1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Work Phone		
(Contact) Child Name2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Address1		
(Contact) Church	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	State/Province	-- Choose --	All items checked
(Contact) City	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Zip/Postal Code		
(Contact) Company	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Desired Areas:		All items checked
(Contact) Contact Type	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Availability:		All items checked
(Contact) Country	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EmergencyContact		
(Contact) Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
(Contact) Deceased	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
(Contact) Do Not E-Mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
(Contact) Do Not Mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
(Contact) E-Mail (2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
(Contact) EmailLists	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
(Contact) Fax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
(Contact) First Name (2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			

Recreation. I certify that I am in good mental

Final step is to customize the **Confirmation** for the form.

A Confirmation page will appear when the form is submitted, showing all completed fields of the form, which can be printed from the Internet Browser.

And/or select to have an **Email Confirmation** sent.



DonorSnap

Donor Management Made Easy

Once your form is created, access the link information.

Forms Listing Tab. Select and highlight the desired form. Click the blue **Form Link** button.

DonorSnap gives a LINK to the form; build a button on your website that Links to the form. Or send your form out in an email.

Or the code to EMBED the form into a web-site. Copy/Paste the embedded forms code and send it to your web-designer.

You only need to embed the form ONCE. Changes can be made to your form after creation, and the live form on your website will automatically update. You do not need to send the Code again to your web-designer.

The screenshot shows the DonorSnap Training interface. At the top, there is a navigation bar with links: Home, Community, Reports, Processing, Online Forms, Maintenance, Help, and Logout. Below this is the DonorSnap logo and the text 'Donor Management Made Easy'. The main content area is titled 'DonorSnap Training' and features a 'Form Link' window. This window has a title bar and a close button. Inside, it displays the 'Forms Link' as a purple URL: <https://entry.donorsnap.com/forms/oForms.aspx?id=M2E5MmI4NzQtMjdIOC00OWY4LTlkN2EtNDc4ZDBlNDQ5NWJm>. Below the link is the 'Embedded Forms Code' section, which contains a code block with instructions and HTML code for embedding the form. The code block includes a comment about adjusting height and width, and the HTML code for an iframe and a badge image. The interface also shows a sidebar with 'Help Page', 'Forms Listing', and a table of forms with 'Edit' buttons.

Forms Link:
<https://entry.donorsnap.com/forms/oForms.aspx?id=M2E5MmI4NzQtMjdIOC00OWY4LTlkN2EtNDc4ZDBlNDQ5NWJm>

Embedded Forms Code:

```
<!-- For help on embedding DonorSnap forms go to http://help.donorsnap.com/DonorSnap-Help/default.aspx?pageid=embedding_forms. You may need to adjust the height and width of the form in order for it to be properly displayed. --><div style="border:1px solid;"><iframe src="https://entry.donorsnap.com/forms/oForms.aspx?id=M2E5MmI4NzQtMjdIOC00OWY4LTlkN2EtNDc4ZDBlNDQ5NWJm" height="650" width="650" frameborder="0" style="margin:5px;" ></iframe><div style="margin:5px; text-align:right;"><a href="http://www.donorsnap.com" rel="nofollow" target="_blank" title="Online Forms Powered by DonorSnap"></a></div></div><!-- End DonorSnap form -->
```




DonorSnap

Donor Management Made Easy

Building Volunteer Sign-In Forms

Use this form as an example for Volunteers to log their own hours through an Online Form.



Macon County Parks Foundation

Please record your volunteer hours. Submit one form for each day worked.

First Name: *

Last Name: *

Address1:

City:

State/Province: -- Choose --

Zip/Postal Code:

E-Mail: *

Cell: *

Date: *

Where did you work?: * -- Choose --

Hours: *

Work Performed: * -- Choose --

If other::

Additional Comments:

* REQUIRED FIELDS



DonorSnap

Donor Management Made Easy

Remember to first add any fields to the Volunteer Tab, before creating your form. Fields on the Volunteer tab are used to track work THAT DAY, such as Supervisor Name, Work performed, Languages Spoken, etc.

Add

Save & Add Another Save & Return to List

Date: 11/20/2013

Event Code: -- N/A --

Hours:

Comment:

Work Performed: 0 Selected

Customize the Event Code under Maintenance > Site-Setup > DonorSnap Site Lookups

Add fields to the Volunteer Tab under Maintenance > Site-Setup > User Defined Setup

Page size: 10

Once all fields are added, create your form.

Online Forms > Standard Forms

Click the **Add** button.

Name your form: example, "VolunteerSign-in"

Choose the **Type** of form. For logging volunteer hours, choose a **Volunteer** type form, which will give you fields from the Contact screen as well as the Volunteer screen.

Clear Filters Clear Sort Add Currently Showing Items 1 to 4 of 4

Form #	Name	Type
		NoFilter

Create a Online Form with a pre-defined template or copy form #:

Template: Select a template...

Name: Volunteer Sign-In

Type: Volunteer

Active: Contact

Insert

Edit 37

Edit 36

Edit 27

Edit 15

Donation

Interaction

Volunteer

Interaction with Payment

YogaRegistration

Fast Pitch Event

Interaction with Pay

Interaction

For Volunteers to log their own hours, create a Volunteer-Type form.



DonorSnap

Donor Management Made Easy

Move through the tabs along the top to customize the look and feel of your form.

Settings: Change the font, colors, and upload your logo.

Allow Registration for users to create an account with your online form, so they do not have to update their contact information each time they log their hours.

Header/Footer: Edit the text at the top & bottom of the form.

Fields: Select which fields are included on your form.

Fields can be **Required** or **Hidden** as needed.

Rename fields to customize the feel of your form (for example, "Event Code" can be customized to read "Where did you work?")

Note: Form Fields can not be changed when open records for the form exist.

Save Cancel Changes

DonorSnap Title	Req'd	Hide	Read Only	Title	Default Value	List Options
(Contact) MembershipBegan	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	First Name		
(Contact) MembershipExpiration	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Last Name		
(Contact) MembershipType	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Address1		
(Contact) Middle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	City		
(Contact) Middle (2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	State/Province	-- Choose --	All items checked
(Contact) Organization Contact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Zip/Postal Code		
(Contact) Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	E-Mail		
(Contact) PhotoRelease	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cell		
(Contact) ProspectType	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Date		
(Contact) QB Customer Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Where did you work?	-- Choose --	All items checked
(Contact) SchoolAttended	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hours	0.00	
(Contact) Suffix	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Work Performed		All items checked
(Contact) Suffix (2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	If other:		
(Contact) Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Comments		
(Contact) Title (2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
(Contact) Volunteer Interests						
(Contact) VolunteerAvailability						
(Contact) VolunteerLiabilityStmt						
(Contact) VolunteerYears						
(Contact) Website						
(Contact) Work Phone						

Confirmation: Edit the confirmation page which will appear when the form is submitted. And/or customize the **Email Confirmation** to be sent.



Activate the Dashboard Alert for Online Forms

DonorSnap will alert you when forms have been submitted. Process these records (choosing whether the contact is existing or New) to place the form information in to the DonorSnap database.

To turn on the Dashboard alert:

Maintenance > Site-Setup > Additional Site Options

Find the **Change** button at the bottom of the screen.

Choose "Online Forms Open Records" under **Dashboard Viewable**

Site Setup

Site Lookups | User Defined Setup | Screen Layouts | Affiliation Setup | E-Mail | **Additional Site Options** | Constant Co

Additional Site Options

Excel C **Maintenance > Site-Setup > Additional Site Options**

Preferred Address

Address Type - Home: Acknowledgement/Address, All other Address Types: Acknowledgement/Compa

Contact Grid:

Show E-Mail Address as link: No

Default Sort Order:

- Use Last Name, If blank use Company (No Last Name or Company - At Top)
- Use Company, If blank use Last Name (No Last Name or Company - At Top)
- Use Last Name, If blank use Company (No Last Name or Company - At Bottom)
- Use Company, If blank use Last Name (No Last Name or Company - At Bottom)
- Last Name, Then Company - Blank (No Last Name or Company) At Bottom
- Last Name & First Name, Then Company (No Last Name or Company - At Bottom)
- Company, Then
- Company, Then

Dashboard Viewable: Yes

Keep & Share Calendar: No

Tickler: Yes

Organization Contact E-Mails: Yes

Acknowledgement Documents: Yes

Online Forms Open Records: No

Turn On "Online Forms Open Records" on the Dashboard, to be alerted when someone submits and Online Form.

Change Options is at the bottom of the screen, to edit the page.