

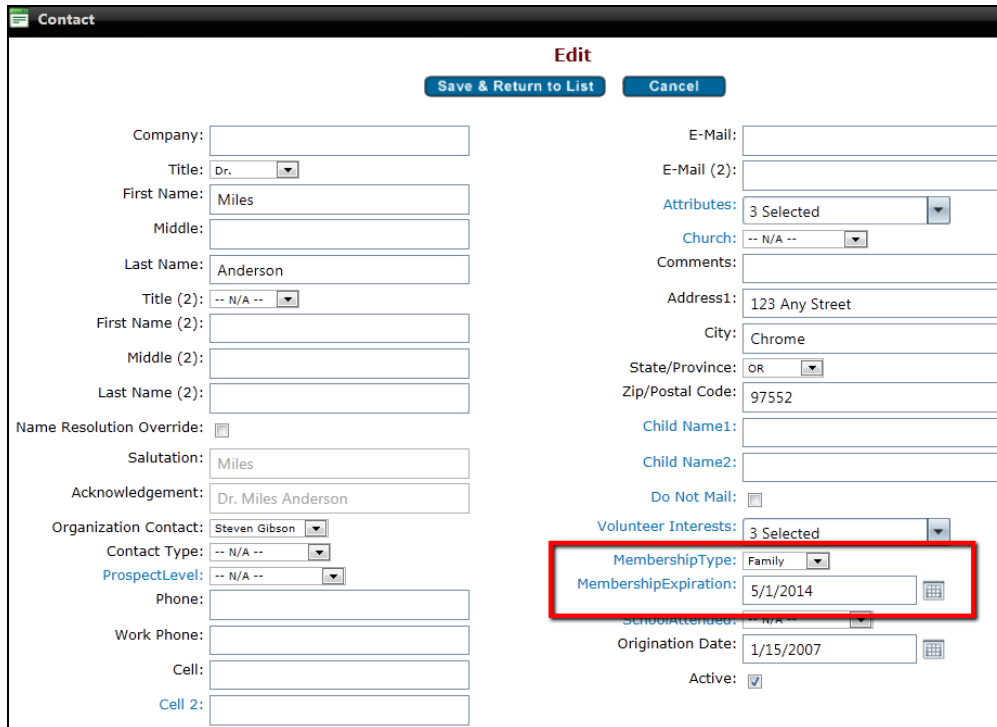
Best Practices: Membership

Tracking Membership with DonorSnap is a breeze! DonorSnap allows you to customize the database to suit the needs of your organization: add fields for MembershipType & Expiration Dates, and then run easy reports on those fields; and print membership-specific acknowledgement letters.

Customizing the program will be determined by the needs of Your Organization. This handout gives examples of some *Best Practices* of other DonorSnap users. However, you are not limited to the examples provided here.

Step 1: Tracking Membership Information

The Contact Screen:



Contact

Edit

[Save & Return to List](#) [Cancel](#)

Company:

Title: Dr.

First Name: Miles

Middle:

Last Name: Anderson

Title (2): -- N/A --

First Name (2):

Middle (2):

Last Name (2):

Name Resolution Override:

Salutation: Miles

Acknowledgement: Dr. Miles Anderson

Organization Contact: Steven Gibson

Contact Type: -- N/A --

ProspectLevel: -- N/A --

Phone:

Work Phone:

Cell:

Cell 2:

E-Mail:

E-Mail (2):

Attributes: 3 Selected

Church: -- N/A --

Comments:

Address1: 123 Any Street

City: Chrome

State/Province: OR

Zip/Postal Code: 97552

Child Name1:

Child Name2:

Do Not Mail:

Volunteer Interests: 3 Selected

MembershipType: Family

MembershipExpiration: 5/1/2014

SeniorAttended: -- N/A --

Origination Date: 1/15/2007

Active:

The first step is deciding **What Fields to Add**.

How does your organization track memberships? Do you have Types or Levels? Do you track the year that the membership first began?

How do you track the expiration? Some organizations use an Expiration date, which would be added to the Contact screen. Other organizations rely on..."a year after their last donation", a field already generated by DonorSnap, so you would not need an additional expiration date.



DonorSnap

Donor Management Made Easy

Add Fields: Maintenance > Site-Setup > User-Defined Settings

Add as many fields as you need to track membership.

1. Go to Maintenance > Site-Setup > User-Defined Settings
2. Select the table (e.g. the Contact tab) where you want to add a new field.
3. Click **Add New Record**.
4. Title the field. ****note:** For best practice, do not use spaces, hyphens, slashes, etc. when naming fields
5. Select the *Type* of field. **** note:** if a member can be TWO types simultaneously (e.g. Lifetime + Patron), you would need a “Multiple Select drop-down” field.
6. Click the **Checkbox** to SAVE the field.
7. Click the mini-tab for **Lookups for User-Defined Controls**
8. Populate the drop-down for your new field.

Step 2: Tracking Donations

To run proper reports on what membership payments have been made, the next step is to code the donations as they are entered.

Donation

Add

Save & Add Another Save & Return to List Cancel

Associated with Pledge: -- N/A --

Date Received: 2/12/2013

Amount: 100.00

Value Received:

Donation Type: Membership Dues

Campaign: Membership

Appeal: 2013 Spring Renewal letter

Accounting Code: 3800 - General Fund

Batch Code: Membership letter

Accounting Period:

Reference #:

Comments: family membership thru 2/15/2014

Acknowledged:

Anonymous:

DonationType: Membership dues.

Some organizations separate out NEW membership & Membership Renewal

Campaign: Some organizations consider “membership” a campaign

Appeal: Track your different membership appeals, whether events or renewal reminders

Batch Code: the Thank you letter.

Almost all organizations will have at least two different thank you letters, for New members, and Renewing members.

Some organizations will have additional letters for lapsed members.

Comments: could be additional information about the membership.

Some organizations will add fields to the donation page to track the membership type and new expiration date.



DonorSnap

Donor Management Made Easy

Customize Drop-downs: Maintenance > Site-Setup > DonorSnap Site Lookups

Customize the drop-downs for all the **black** fields on the Donation page (DonationType, Appeal, etc.).

****Note:** For Appeal code, it is recommended to include the Year (ex. 2012 Spring Renewal letter) which will help with your reporting.

Don't Forget about the Batch Code! The **BatchCode** field is the title of your Thank you letter, which will be very important for membership donations.

Step 3: Printing Acknowledgement Letters

Acknowledgement letters for NEW memberships and renewing members are key to maintaining the good relationship between your organization and its yearly donors.

You create the letter in Word and upload it into Donorsnap (additional help & videos located by using the blue Page Help and How to Video buttons at the top left of each screen in DonorSnap).

Customize the **BatchCode** field on the Donation page, as described above.

Enter a donation in to the program, indicating the BatchCode (the letter) you want to generate for that donation.

Go to **Processing > Documents and Labels > Donation Acknowledgment Letters**

Page Help
How to Video

Acknowledgement Word Document (Process)

Acknowledgements Pending	Batch Code	Export Batch Data to Excel	Generate Batch Donation Acknowledgements with Selected Document	Mark Batch Records as Acknowledged
2	General donation thank you letter	Excel	Generate	Flag Update
3	Membership letter	Excel	Generate	Flag Update

Select Document for Mail Merge:

- Envelopes.doc
- General Thank You - Letterhead.doc
- General Thank You.doc
- Mailing Labels.doc
- Membership Thank You.doc

Select output format:

- DOC - Microsoft Word 97-2003 Document
- DOCX - Microsoft Office 2007 / 2010
- RTF - Rich Text Format 1.9
- TXT - Plain Text
- PDF - Portable Document Format

Here all outstanding donations will be grouped together by **BatchCode** so you can see which donations need the Membership letter.



Step 4: Running Membership Reports

Membership organizations have much information to maintain on their Members: Current members, those memberships about to expire, Expired and Lapsed members.

Membership reports in DonorSnap can be built using **DataMinerPlatinum**. These reports will give you all the membership data you need, as well as build the spreadsheet of an Address list, which you can then use to send your renewal letters.

Batch Listing					Data Export Selection	Field Export Selection	Query Builder	Review Data and Export
+ Add new record								
#	Title	Description	File Name	Query Builder Error				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				
134	Expired Members	query membership date of a few months passed						
133	Expiring Memberships	query upcoming expiration dates						
132	Current Members	query of today's date and beyond						
124	Contact Information	-- N/A --						
116	Donation Listing	-- N/A --						
114	All Contacts	-- N/A --						

Reports > DataMinterPlatinum reports are dynamic, which means they are saved and always current.

It is a *Best Practice* to create a few of these reports to have as templates. Each month you'd simply change the query date range to that relevant to the month, instead of having to rebuild the report again entirely.

If your organization uses a MembershipExpiration date, all reports would have a query based on that field.

If your organization generates an Expiration date based on "the date of last donation", then "DonationDateLast" is the field used for the query.



For example, let's look at a report for Memberships about to expire. Perhaps you need to generate an address list so you can send renewal reminder letters.

Add a new record.

Data Export: both "DonationDateLast" and "MembershipExpiration" would be **Contact** reports

Field Export: Export the fields you want on your report, in this case all the address fields and all you'd need to pull out in order to send a mailing. ****you might want to pull out the date of last donation, just for fun****

Query: MembershipExpiration <between> Date1 & Date2

Review: Gives you a preview of your "spreadsheet". **Export** report to Excel.



DonorSnap

Donor Management Made Easy

Printing Renewal Letters

Now that a report is run in **DataMinerPlatinum**, Export this report to Excel. Perform a standard mail-merge between this Excel file and your renewal letter. Use this method if you change your letters each time, such as updating the bullet-points of what their membership benefits are, or what their membership support, included in the body of your letter.

Batch Letters

Do you use the same renewal letter time and time again? Then upload that letter into DonorSnap, and print letters each month directly from the program!

Export your report to Excel and save it somewhere on your computer.

Merge the Excel file with your renewal letter; SAVE the letter on your computer.

Upload that letter into DonorSnap: **Processing > Documents and Labels > Upload/Download**

Make sure to upload the letter to the **DataMiner Batch Letters selection (not the Acknowledgement letters)

Go to **Processing > Documents and Labels > DataMiner Batch Letters**

Select the DataMiner report from the list

Select the uploaded letter from the 2nd list below

Click the **Process** button to generate the merged letters.