



## Tracking Events in DonorSnap

Use DonorSnap to track your Events! Track event mailings, ticket purchases, class attendance, etc.

Remember that DonorSnap is Contact-driven, meaning Yes we can track events, but it is because Bob Smith attended an event. You have to open Bob's record, and add "activity" for him, whether it is that he received an Event mailing, or bought an Event Ticket, or signed up for a class.

The key to tracking events is understanding **where the data is stored** in the program, and depending on your needs, you may use multiple areas of the database to track your Event-related information.

### Donation Tab

- Track the **Money** given at an Event
- **DonationType** indicates what type of money: Donation, Event Registration, Raffle Ticket, Auction Purchase, Table Purchase, Sponsorship
- **Appeal** indicates what event: 2014 Golf Tournament, 2013 Christmas Gala, 2014 Summer Yoga Classes
- **Add User Defined fields** to track # of tickets, Sponsorship level, etc. that pertains to that monetary payment

### Interaction Tab

- Track **Non-Financial** information
- Free events, Mailings, RSVPs, additional information you do not want to add to the Donation tab.
- **Interaction Type** could be broad, such as "Attended an Event" and then use the comments to indicate the event; or enter your events directly to this drop-down
- **Add User Defined fields** to track Dinner Option, Who Attended, Classes registered for, Instructor's Name, etc. that pertains to that Non-financial event

Event Tracking will be the most customized area within DonorSnap and each organization tracks events differently. Remember you can add nearly unlimited fields to DonorSnap!

To customize the Black DonorSnap fields (DonationType, Appeal, InteractionType): **Maintenance > Site-Setup > DonorSnap Site Lookups**

To customize or add Blue User Defined fields: **Maintenance > Site-Setup > User Defined Setup**



# DonorSnap

Donor Management Made Easy

## Online Forms

\*\*If you do not see **Online Forms** along the menu, remember the visible menus are defined by Your Individual User Security. When you log in as “Sam” the user, you need to edit your security to have access to Online Forms. **Maintenance > User Setup > Highlight the User Name > Rights** tab.

DonorSnap’s Online Forms allows you to build forms for your website which interact with the DonorSnap database. Build forms to take RSVP and Event Registration and/or take payment for the Events.

The screenshot shows a registration form for an event titled "Celebrate MALAIKA". The word "Celebrate" is in a teal script font, and "MALAIKA" is in a bold, red, sans-serif font. To the right of the text is a colorful, multi-petaled flower icon. Below the title, there is a short paragraph of text: "Join us for our annual dinner celebrating the Malaika Child Development Center! Please complete the form below and the # of Tickets you are purchasing." The form fields include: "First Name:" with a text input field; "Last Name:" with a text input field; "#ofTickets:" with a dropdown menu showing "-- Choose --"; "E-Mail:" with a text input field; and "Amount:" with a text input field containing "0.00". At the bottom of the form, there is a thank you message: "Thank you for supporting the Malaika Child Development Center. We look forward to seeing you!" and a red button with the text "Click here to submit your registration".

If you are building forms to take payment you must have an account with Accelerated Payments, the 3<sup>rd</sup> party payment processor that DonorSnap is integrated with. You cannot build “Donation” forms without this account setup. Contact support at [feedback@donorsnap.com](mailto:feedback@donorsnap.com) for information on getting started with Accelerated Payments.

Build **Interaction** forms (to accept Non-financial aspects of your events, such as RSVP, Registration, Class Sign-ups, etc.) or **Donation** forms (to accept payment for Events).

Additionally you can build **Interaction + Payment** forms which will create an Interaction Record (they registered, want the vegetarian meal and are bringing the Jones’) as well as Payment (paying \$50 for the ticket).

You build the forms within DonorSnap. You decide what information is included in your forms: logo, text, the fields from the database you need; and customize the confirmation.

Forms directly relate to the database. If you are asking what dinner option they want, you must include that field within the database BEFORE you can add it to the form. The form is only an extension of what already exists in the database.

Watch additional webinars under **Help > Past Recorded Webinars** on how to build Event Registration forms.



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## Mass Input of Data

Often the information about your event (who attended, checks you received) is not captured until after the event is over, and you have a mass of information to load in to DonorSnap.

There are two ways of inputting mass data in to DonorSnap, with relation to Events. The **Mass Entry** tool within DonorSnap or by **Excel Import**.

## Mass Entry Tool (Community > Mass Entry)

\*\*If you do not see Mass Entry under your Community menu, remember the visible menus are defined by Your Individual User Security. When you log in as "Sam" the user, you need to edit your security to have access to the Mass Entry Tool. **Maintenance > User Setup > Highlight the User Name > Rights** tab.

#	Name	Type	Not Posted Data Entry	Posted Records	Total Records
<a href="#">Edit</a> 19	spring Fling donations	Donation	0	2	2
<a href="#">Edit</a> 17	InKind Donations	Donation	0	2	2
<a href="#">Edit</a> 16	Classes	Interaction	0	4	4
<a href="#">Edit</a> 15	Winter Renewal	Donation	0	9	9
<a href="#">Edit</a> 13	Golf Tournament	Donation	1	4	5

Mass entry allows you to create a DataEntry page for inputting data with the same criteria.

**Donations/Tickets:** a stack of checks loaded as "Donation" activity which all have DonationType = Event Registration; Appeal = Golf Tournament; Campaign = Annual Campaign; TY Letter = Golf Thanks letter. Instead of entering each check manually by looking up the contact and completing all the above fields, Create a Mass Entry batch for your Golf Tournament Tickets.

**Attendees/RSVP:** a list of non-financial information such as Attendees & Dinner option, loaded as "Interaction" activity. Instead of entering each interaction manually by looking up the contact, create a Mass Entry batch for your "Class Attendance".

Watch the webinar under **Help > Past Recorded Webinars** for the Mass Entry tool.



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## Excel Import (Maintenance > Excel Import)

Have a spreadsheet of Donations (Tickets) or Interactions (Attendance) from your Events? You can upload that spreadsheet in to DonorSnap via the Excel Import tool.

The screenshot shows the 'Excel Import Process' interface. At the top, there are tabs for 'Step 1: File Import', 'Step 2: Column Mapping', 'Step 3: Validate', 'Step 4: Review', 'Step 5: Load Data', and 'Loaded Data Listing'. The 'Step 1: File Import' tab is active. On the left, there is a 'Choose File' button and an 'Upload' button. Below that, there are sections for 'File Uploaded:', 'Select Sheet to Process:', 'Data Import Type:' (with radio buttons for Contacts, Interaction, Persona, Tickler, Address, Volunteer, Donation, Notes, Pledge, Affiliated, and Update Contact Information), and 'Duplicate Checking (Contact Import Only):' (with checkboxes for matching last name, first name, address, phone, and email). On the right, there is a 'Help' section with links to 'Notes for import Excel Import success: Notes (PDF)', 'Excel Import Overview: How to Video', and 'Excel Import File Selection: How to Video'. Below the help is a 'Messages: (Excel File Upload and Sheet Selection)' section with two segments: 'Segment A: Browse for file to import, then click upload.' and 'Segment B: Select sheet to process, Data Import Type, Error Checking.' At the bottom right, there is an 'Available Fields:' section with a list of fields: Contact, Address, Donation, Pledge, Interaction, Tickler, Volunteer, Notes, and Persona.

The key with the Excel Import is when importing data to existing records, you must include a unique identifier (their Record # in DonorSnap or Email address) to tie the “activity” to the contact, so the program knows the proper place to load the data.

Ideally, if you have a sign-up sheet at your Event, use a spreadsheet from DonorSnap that includes the ContactIPK# (their record number in DonorSnap), so when it comes time to re-import that spreadsheet, the record number already exists. If you do not have the record number, you may be able to use their Email Address, so make sure to capture that at the event.

Watch the webinar under **Help > Past Recorded Webinars** for the Excel Import tool, as well as the **Help Video** and written instructions on the tool’s page (Maintenance > Excel Import).

Remember that the Excel Import is an advanced feature. Not all users will - or should - have access to this tool. If you do not have Excel Import under your Maintenance menu, this is defined by your individual user security. Either change your User Setup (Maintenance > User Setup) or have your administrator complete the import for you.



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## Reporting on Events

Once you have entered your data on who purchased tickets, who received the mailing, etc., it's time to run Event Reports! Reports correlate directly to **where the data is stored** in the program.

### Reports > Donation Activity > Donations Received

- How much did I make at the Golf Tournament? (filtering on the Appeal Code)
- How much did I make this year in Event Tickets? (filtering on the DonationType)
- Will give you a simple report OR Excel Export of all donations within a certain time period with the criteria you choose
- **Does Not include User-Defined fields**

### Reports > Interaction Activity > Interaction by Type

- Gives you Date, InteractionType and Comment
- Best used for simple interactions such as who received my invitation mailing
- **Does Not include User-Defined fields**

The above pre-built reports in DonorSnap will give you quick answers to “How Much” or “How Many” questions you have about your reports, but do not include any User Defined fields you’ve added to the program.

### Reports > DataMinerPlatinum

- Any custom report: Mailing lists, Attendees, Donations, etc.
- You define the type of report and criteria to include, as well as what fields to query
- Includes ALL fields within the database (including User Defined fields).
- If you added User-Defined fields (# of Tickets, Dinner Option) you must build a **DataMinerPlatinum** report to extract that detail.