



**DonorSnap**  
Donor Management Made Easy

## Building Event Registration Forms in DonorSnap

**Online Forms** is a module that comes installed with DonorSnap. You create your own forms. Forms are built within DonorSnap and uploaded to your website. When someone submits a form, the information comes down to the DonorSnap database where it can be processed.

If you are accepting payment for your events, The Credit Card is processed through a 3<sup>rd</sup> party called **Accelerated Payments**, who deposits the money in your bank account.

If you need to take payment for your events, you must have an account with **Accelerated Payments** BEFORE building Donation-related forms in DonorSnap.

You can have as many forms as you need (you are not charged per form). Many organizations might have different forms for different aspects of their events: such as One form for **Sponsorship** purchases, and another form for **Individual** tickets.

**DonorSnap's forms are NOT a shopping cart:** such as ordering one adult ticket + 2 children's tickets at the same time. If you need this type of purchasing options, you will likely build multiple forms.

### Enter your Accelerated Payments Information

Once you set up your account with Accelerated Payments, you (**or them**) need to enter your account details under **Maintenance > Site-Setup > Payment Processing**. In many cases, Accelerated Payments will log in to your DonorSnap site and do this for you, as well as set up a "fake" form & test it.

### Plan Your Form & Setup the Database:

Write out your form ahead of time, so you know what fields you may need to alter in DonorSnap. Remember that your form directly correlates to what information is in the database. You must add fields to the database first, before adding them to the form.

**Donation Form:** to accept payments from your form (ticket purchase, sponsorship, table purchase)

**Interaction Form:** NON-financial events, such as RSVP's, Open Houses, Non-Paid events & classes


**Interaction + Payment:** Combines the non-financial aspects of an Event (what size t-size, what dinner option, who they're bringing, etc.) and also takes a payment for the event.



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The Point: To turn this form, into a submission in the database:



Our weekend Yoga & Pilates classes help support our Education Fund at the Macon Community Center. Each class is \$17 for residents of Macon County, \$22 for non-residents.

Please complete the form below indicating the class sessions you will be attending, and the amount to be charged to your credit card. Once you submit the registration page, you will be taken to a secure page to enter your Credit Card detail.

**First Name:** \*

**Last Name:** \*

**E-Mail:** \*

**Cell:**

**Address1:**

**City:**

**Zip/Postal Code:**

**State/Province:** -- Choose --

**ClassSessions:** -- Choose --

**Amount:** \*

\* REQUIRED FIELDS

Thank you for support the Macon Community Center and your interest in community health!

[Register for Class!](#)

**Add**

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

Associated with Pledge: -- N/A --

Date Received: 7/15/2014

Amount: 34.00

Value Received:

Donation Type: Event Registration Fee

Payment Method: Online - AP

Campaign: -- N/A --

Appeal: 2014 Yoga Classes

Accounting Code: 3800 - General Fund

Batch Code: Received online thank you

Accounting Period:

Reference #:

Comments:

Acknowledged:

Anonymous:

Organization Contact E-Mail Sent: No

**Think.... How would I type in their donation manually?** Back up and look at the database structure, to help you plan your form.

When building your form, which we'll get to in a minute..... you can HIDE fields from your website visitor.

For example, you can program the **DonationType** to indicate "Event Registration" and then HIDE that DonationType field from your online form. This way the DonationType field is populated when the form is submitted, but the visitor to your website does not see that information.

This will be very relevant with fields such as Date, Payment Method, Appeal, and Batch Code.



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## Donation (Financial) Forms:

Build a **Donation** form if you are accepting payment for your event. This form will update the **Donation** tab of the database. Below is the **Donation** tab, completed with event-related information.

**Add**

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

Associated with Pledge: -- N/A --

Date Received: 7/15/2014

Amount: 34.00

Value Received:

Donation Type: Event Registration Fee

Payment Method: Online - AP

Campaign: -- N/A --

Appeal: 2014 Yoga Classes

Accounting Code: 3800 - General Fund

Batch Code: Received online thank you

Accounting Period:

Reference #:

Comments:

Acknowledged:

Anonymous:

Organization Contact E-Mail Sent: No

Customize the drop-downs for **DonationType** (to indicate Sponsorship or Table Purchase or Event Ticket), **Payment Method** (to indicate Online), **Appeal Code** (the name of your event), etc., under **Maintenance > Site-Setup > DonorSnap Site Lookups**.

Add additional fields for “Number of Tickets” or “Sponsorship Level” under **Maintenance > Site-Setup > User Defined Setup**.

### How are you going to Thank your donors for their online registration?

The Online Form will send an email as acknowledgement, and this can be customized by you. For many organizations, this email receipt is all you need as Thanks; or some organizations will continue to print a Thank You letter in addition to the email.

Regardless of your process, **DonorSnap will want to print a letter for you**. When a Donation comes in through an online form, it is considered “UN-Acknowledged”, which triggers an alert on the Dashboard to print a Thank you letter.

Include a **Batch Code** in your form (remember the Batch Code is the Title of the Letter you want printed), to tell the program WHICH letter to print. Many organizations will create an option in their drop-down for “Do not send TY letter” or “Received Online TY”, indicating that the email receipt from the form is enough.

This way, when the Donation is processed, the program will alert you to print a letter, but you can simply “acknowledge” that batch without printing; and they will be separated from other manual donations you have entered.



# DonorSnap

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## Interaction (Non-Financial) Forms:

Build an **Interaction** form if you are NOT accepting payment for your event. This form will update the **Interaction** tab of the database. Below is the **Interaction** tab, completed with event-related information.

**Add**

Date of Interaction:

Interaction Type:

ClassSessions:

Comments:

Customize the **Interaction Type** under **Maintenance > Site-Setup > DonorSnap Site Lookups**.

Add additional fields for “ClassSessions” or “DinnerOption” under **Maintenance > Site-Setup > User Defined Setup**

The Interaction tab will be useful in tracking RSVP’s to an event, or any Non-Financial events such as Open Houses, Board Dinners, Annual Meetings, etc.

## Interaction + Payment Forms:

Build an Interaction + Payment form to include **BOTH** an Interaction Record (non-financial information) as well as a Donation record for the contact.

For example, say I wanted to track All My Classes on the **Interaction** tab. Some are paid, some are Free, but from a data-management perspective I want to track class attendance on the Interaction tab. Now when someone registers online for a PAID class, I need that form to both take their payment (Donation) PLUS add the interaction activity that they are attending class.

\*\*\* This form is all about where you are storing your Event-related data within your database. Most organizations do not need an Interaction + Payment form, but it is a third option available to you.



## Build Your Form

**Online Forms > Standard Forms** (or Recurring, if you're building a Recurring form)

-- If you do not see Online Forms along your top menu, Your User does not have the security setting to access online forms. Ask your administrator to change your User Rights under **Maintenance > User Setup**

Add your form

**There are templates for "DonateNow" (Donation) and "Event Registration" (Interaction)**

**Type the Name of your Form.**

**Choose the Type of Form you are building (which tab(s) of the database will be updated when the form is submitted)**

Form #	Name	Type	Active	
		NoFilter		
	Create a Online Form with a pre-defined template or copy form #:			
	Template: <i>Select a template...</i>			
	Name: <input type="text"/>			
	Type: <input type="text"/>			
	Active:			
<b>Insert</b>	Contact			
<b>Edit</b> 51	Donation			
<b>Edit</b> 50	Interaction			<b>Form Link</b>
<b>Edit</b> 43	Volunteer			
	Interaction with Payment			
		Donation	Yes	<b>Form Link</b>
		Contact	Yes	<b>Form Link</b>

Start Building your Form

**Move through these tabs along the top to build the sections of your form**

Forms Listing | Settings | Header/Footer | Fields | Confirmation | Preview | Open Records | Pro

Currently Showing Items 1 to 7 of 7

Form #	Name	Type	Active	
<b>Edit</b> 44	DonateNow	Donation	Yes	<b>Form Link</b>



## Customize your Settings

Forms Listing **Settings** Header/Footer Fields Confirmation Preview Open Records Process Records

Save Cancel Changes

Registration Pages and Online Form Page Settings

Page: \_\_\_\_\_

Font: Verdana

Show Registration Form:

Allow Guest Login:

Logo (image): \_\_\_\_\_ Select

Current Image: DonateSampleImage.jpg Remove

Color: [Black] Color: [White] Color: [Light Blue] Color: [Dark Blue]

SAMPLE TEXT

SAMPLE BUTTON

Upload your Logo

**Major Donors Capital Campaign**

Do not give out of obligation, but when you give, give with a grateful heart and a cheerful spirit

**Registration/Guest Login:** The “Registration” allows your contacts to create a UserName & Password. Once registration is completed, when the user comes back to fill out another form, their Name/Address/Cell, etc. will automatically be inserted to the field. This is very helpful for contacts who are completing numerous online forms, such as volunteers logging their own hours, or someone completing many Event Registration forms; and submissions by registered users are also much quicker to process by your staff.

When you all registration, you could ALSO have a Guest option, to get around that registration.

**If you wish to turn off Registration & Guest Login, simply UN-Check the boxes.** By default, they will be turned ON.



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## Customize the Header/Footer

Forms Listing Settings **Header/Footer** Fields Confirmation Preview Open Records Process Records

User Logins

Save Cancel Changes

**Customize the text at the top & bottom of your form**

Online Form:

**Header:**

Font Name Real... Verdana, tah... 13px

Please complete each of the following fields.

**Footer:**

Verdana, tah... 13px

You will need to enter your credit

Design HTML Preview

**Button:**

Next Step: Enter Payment Information

**Rename the Button, if needed**

Consider including instructions on completing the form. For example if this form is taking payment, you might remind them that this is only Step 1, and another step is coming.

Rename the text on the Button as needed, such as change to **RegisterNow!** 😊



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If you are building a Financial Event Form (Donation form) to accept payment, Add fields:

Forms Listing Settings Header/Footer **Fields** Confirmation Preview Open Records Process Records User Logins

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

Save Cancel Changes

**Fields can be Required or Hidden.**

**Set Default values for the Event Date and all drop-downs.**

DonorSnap Title	Req'd	Hide	Read Only	Title	Default Value	List Options
(Contact) Address Type	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	First Name		
(Contact) Address1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Last Name		
(Contact) Address2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	E-Mail		
(Contact) Address3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
(Contact) AgreeToVolunteer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
(Contact) Anniversary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	#ofTickets	-- Choose --	All items
(Contact) Attributes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
(Contact) Birthdate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Amount	00	
(Contact) Cell	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Date Received	7/15/2014	Hidden
(Contact) Cell 2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Donation Type	Event Registration Fee	Hidden All items
(Contact) Child Name1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Appeal	2014 Summer Dinner	Hidden All items
(Contact) Child Name2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Campaign	Capital Campaign	Hidden All items
(Contact) Church	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Accounting Code	3800 - General Fund	Hidden All items
(Contact) City	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Batch Code	Received online thank yo	Hidden All items
(Contact) Company	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
(Contact) Contact Type	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
(Contact) Country	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
(Contact) Credentials	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			

**Drag & Drop fields as needed.**

**Drag up & down the list to re-order.**

**Drag & Drop** fields as needed, to add and remove from your form. Drag fields up & down the list to re-order.

**Rename fields:** Customize your fields for a more personal feel, such as “#ofTickets” could be renamed to: How many tickets?

**Set Default Drop-downs.** Many of the donation fields are drop-downs and can be set with a default. For example, All Donations through this form will be set with a **PaymentMethod** of “Online”; All the **Appeal** will be the name of the event.

**Date Received:** Default the date of your Event, OR leave blank and the DonationDate will be submitted with Today’s Date.

**Make sure to drag over all relevant Donation fields** which will be Hidden from the form, but are necessary on the **Donation tab** within the database.



If you are building a Non-Financial event form (Interaction), add fields:

DonorSnap Title	Req'd	Hide	Read Only	Title	
(Contact) School-Multiple	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	First Name	
(Contact) SchoolAttended	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Last Name	
(Contact) State/Province	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	E-Mail	
(Contact) Suffix	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cell	
(Contact) Suffix (2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cell	
(Contact) Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cell	
(Contact) Title (2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cell	
(Contact) Volunteer Interests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Date of Interaction	8/12/2014
(Contact) VolunteerAvailability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Interaction Type	2014 Golf Outing
(Contact) VolunteerLiabilityStmnt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Interaction Type	2014 Golf Outing
(Contact) VolunteerYears	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Number of Golfers	-- Choose --
(Contact) Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Name of Captain (if different)	
(Contact) Work Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	T-Shirt Size	-- Choose --
(Contact) Work Phone (2)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	T-Shirt Size	-- Choose --
(Contact) Zip/Postal Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Comments	
(Interaction) ClassSessions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Comments	
(Interaction) DinnerOption	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Comments	
(Interaction) Event	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Comments	
(Interaction) TableCaptain	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Comments	
(Interaction) Trainer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Comments	

**Drag & Drop** fields as needed, to add and remove from your form. Drag fields up & down the list to re-order.

**Rename fields:** Customize your fields for a more personal feel, such as “Comments” to “Additional Comments”

**Set Default Drop-downs.** Many of the donation fields are drop-downs and can be set with a default. For example, All Donations through this form will be set with an **InteractionType** of “2014 Golf Outing”

**Interaction Date:** Default the date of your Event, OR leave blank and the InteractionDate will be submitted with Today’s Date.

**Make sure to drag over all relevant Interaction fields** including any User Defined fields you have added. Remember fields can be **Hidden** and/or **Required**.



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If you are building an Interaction + Payment form, add fields:

Note: Form Fields can not be changed with

Save Cancel Changes

DonorSnap Title

Req'd	Hide	Read Only	Title	Default Value	List Options
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	City		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Zip/Postal Code		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	State/Province	-- Choose --	All items checked
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ClassSessions		All items checked
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Amount	0.00	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Batch Code		Event Registration letter
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Campaign		Capital Campaign
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Accounting Code	5202 - Restrict	2014 Yoga Classes
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Appeal		Event Registration Fee
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Donation Type		7/15/2014
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Date Received	7/15/2014	Online - AD
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Payment Method		All items checked
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Date of Interaction	7/15/2014	Hidden Hidden Hidden Hidden Hidden Hidden
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Interaction Type		Classes All items checked

Remember that an Interaction + Payment form is submitting an **Interaction Record**, the Non-Financial parts of the event, as well as the **Donation Record**, the payment for the event.

**Your form must include ALL FIELDS necessary for both these tabs to be updated.**

**Drag & Drop** fields as needed, to add and remove from your form. Drag fields up & down the list to re-order.

**Rename fields:** Customize your fields for a more personal feel, such as “ClassSessions” to “What Classes Do You Want to Attend”

**Set Default Drop-downs.** Many of the donation fields are drop-downs and can be set with a default.

**Date:** Default the date of your Event, OR leave blank and the Date will be submitted with Today’s Date.



# DonorSnap

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## Build your Confirmations

Confirmation which will appear on the screen when they submit their donation

Email Confirmation

There are TWO confirmations created by the Online Form:

Left: a Confirmation webpage which will appear in their browser when they submit the form. **Thank you for your submission** - type confirmation.

Right: an **Email Confirmation**.

Many organizations will use the Email Confirmation as their Thank You letter, customizing with their Tax ID # and Legal jargon.

And/or insert links to additional information and resources about your organization.

**Set a BCC** (blind email copy) to you or your director, so they are notified when a donation is made!

DonorSnap will alert you on the Dashboard when a Donation is received – this is simply another option to stay informed.



# DonorSnap

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## Put the Form on your Website

Once you have built the form to your needs (or at least the needs for today, because you can make updates later), you need to get the form Live on your website. You will need to get your **Web Designer** involved for this process, if that is not you.

Help Page Help Video

Create/Edit Online Forms  
Current Form --> 49 - DonateNow (Donation)

Forms Listing Settings Header/Footer Fields Confirmation Preview Open Records Process Records User Logins

Clear Filters Clear Sort Add Currently Showing Items 1 to 7 of 7

Form #	Name	Type	Active	Open Records	Delete
49	DonateNow	Donation	Yes	0	
43					
40					
38					
36					
27					
15					

Click the Form Link Button

Form Link

Forms Link:  
<https://entry.donorsnap.com/forms/oForms.aspx?id=MzVhZDFjNzctZjYxMy00Nzg1LTg1YTAtYjM3YWJhMWViYjkk>

Embedded Forms Code:

```
<!-- For help on embedding DonorSnap forms go to http://help.donorsnap.com/Help/default.aspx?pageid=embedding_forms. You may need to adjust the form in order for it to be properly displayed. --><div style="border: 1px solid #ccc; padding: 5px; width: 100%; height: 100%; text-align: center; background-color: #f9f9f9;"><iframe src="https://entry.donorsnap.com/forms/oForms.aspx?id=MzVhZDFjNzctZjYxMy00Nzg1LTg1YTAtYjM3YWJhMWViYjkk" height="650" frameborder="0" style="margin: 5px;" ></iframe><div style="margin: 5px 0 0 0; text-align: center; font-size: 0.9em; color: #7f7f7f;"><a href="http://www.donorsnap.com" rel="nofollow" target="_blank" title="Online Forms by DonorSnap"></a></div></div><!-- End DonorSnap form -->
```

DonorSnap gives you the LINK to the form  
or, the code to Embed the form in to your site

On the **Forms Listing** tab, click the **Form Link** button. Copy the Code for the Embedded form, and email to your web-designer to drop in to a page on your website.

**\*\*You only need to embed the form ONCE\*\* All changes made to your form in the future will automatically update the live form on your website.**



## Adding fields with linked information

For example, let's say you need a drop-down for **Number of Tickets**. Visitors to your form can choose the number of tickets they are purchasing and the **Amount** will automatically calculate, if YOU create the linked drop-down.

1. Create the field in DonorSnap. In this example, add a "Number of Tickets" to the Donation page.
  - a. **Maintenance > Site-Setup > User-Defined Settings**
  - b. Choose the **Donation** tab from the Activity table drop-down.
  - c. Add your field: Name it, and Create a "Single-Select drop-down"
  - d. Click the **Lookups for User Defined Controls** mini-tab. Create the drop-down for the number of tickets: 1,2,3,4,table, etc.
2. Create the linked amounts.
  - a. **Online Forms > Payment Amount/Drop-down Link**
  - b. In the **Types** drop-down, choose whether it is an Existing DonorSnap field, or change the drop-down to **User-Defined Lookups** to access the new User-Defined field added.
  - c. Click the Expand arrow next to the **Tickets** field.
  - d. Edit (pencil icon) the amount next to each item in the drop-down.
3. Add the field to your form
  - a. On the **Fields** tab of the form, drag over the Tickets field to the form.
  - b. In the "All Items Checked" drop-down to the Right, select **Link to Amount**.

Now you will have an automatically populating field on your form. When they select the number of tickets, the Amount will generate in the **Amount** field of the form.

Remember that DonorSnap's online forms are NOT a shopping cart. You cannot choose 2-adults, 1-child, 1-table all on the same form and have the amount automatically generated. Only one field can be linked to an amount and forms cannot do any kind of calculations

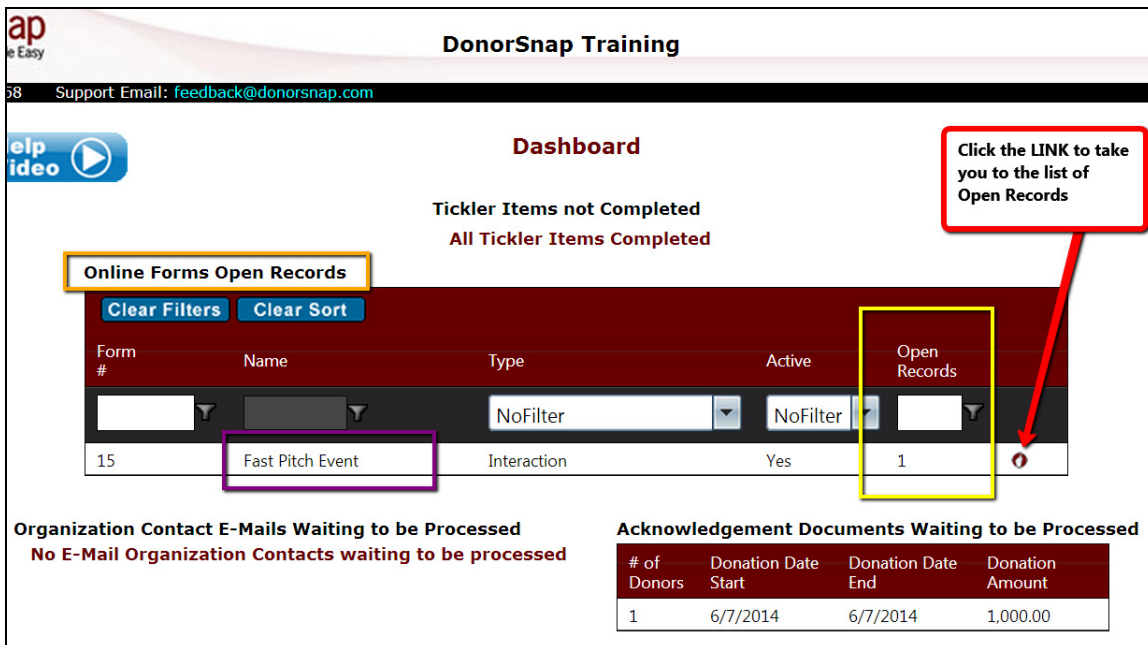
## Process Forms

Someone submitted a form..... Now What?

You need to be alerted that a form was processed; and now you need to **Process** that Open Record.

## Turn on your Dashboard Alert

When an online form is submitted, you can be alerted on your Dashboard that you have an **Open Record** to Process.



**DonorSnap Training**

Support Email: [feedback@donorsnap.com](mailto:feedback@donorsnap.com)

**Dashboard**

Tickler Items not Completed  
All Tickler Items Completed

**Online Forms Open Records**

Clear Filters Clear Sort

Form #	Name	Type	Active	Open Records
15	Fast Pitch Event	Interaction	Yes	1

Organization Contact E-Mails Waiting to be Processed  
No E-Mail Organization Contacts waiting to be processed

Acknowledgement Documents Waiting to be Processed

# of Donors	Donation Date Start	Donation Date End	Donation Amount
1	6/7/2014	6/7/2014	1,000.00

To turn on this alert:

1. Go to **Maintenance > Site-Setup > Additional Site Options**
2. Click the **Change Additional Options** button at the bottom of the screen.
3. Find the section for **Dashboard Viewable**, and make sure the box next to **Online Forms Open Records** says **YES**.
4. Click **Save**.

Now click the tiny DonorSnap logo to the **Right** of the alert (it is a link), which will list all **Open Records** from your form.



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## Credit Card Messages

Once you click on Open Records, all form submissions should be listed, with a **Credit Card Message** of whether or not the card was processed.

The screenshot shows the 'Open Records' page in DonorSnap. The page title is 'Current Form --> 49 - DonateNow (Donation)'. The navigation bar includes 'Forms Listing', 'Settings', 'Header/Footer', 'Fields', 'Confirmation', 'Preview', 'Open Records' (highlighted), 'Process Records', and 'User Logins'. Below the navigation bar, there are buttons for 'Save Load Selections', 'Clear Filters', and 'Clear Sort', along with the text 'Currently Showing Items 1 to 5 of 5'. The main table has the following columns: 'Register User', 'Form Submitted', 'Load Contact into DonorSnap', 'DonorSnap Contact #', 'Credit Card Message', '(Contact) First Name', and '(Contact) Last Name'. The 'Credit Card Message' column is highlighted with a yellow box. The table contains five rows of data:

Register User	Form Submitted	Load Contact into DonorSnap	DonorSnap Contact #	Credit Card Message	(Contact) First Name	(Contact) Last Name
<a href="#">Edit</a> GUEST	6/17/2014 11:57:45 AM	<input type="checkbox"/>		Pending	Frances	Taylor
<a href="#">Edit</a> GUEST	6/17/2014 12:01:35 PM	<input type="checkbox"/>		Approved	Jeff	Taylor
<a href="#">Edit</a> GUEST	6/17/2014 12:11:15 PM	<input type="checkbox"/>		Pending	Patricia	Morgan
<a href="#">Edit</a> GUEST	6/17/2014 12:12:16 PM	<input type="checkbox"/>		Approved	Barry	Jones
<a href="#">Edit</a> GUEST	6/17/2014 12:13:42 PM	<input type="checkbox"/>		Unable to Process	Charlie	Nevitt

**Approved:** The Credit Card was successfully processed!

**Pending:** The transaction has not yet been completed. The donor may still be entering payment information, the card may have been declined, or the page may have been closed before a credit card was submitted. You cannot delete a Pending transaction. It will take some time (up to 6 hours) for it to fully process in the system. Once this message changes to **“Unable to Process”** you can delete it.

**Unable to Process:** Means the Contact did not enter a valid credit card. They submitted the first page of the form, but the card was either declined or the page was closed before completing their payment information.

Both Pending and Unable to Process cannot be processed in to DonorSnap, since their payments were not received.

**To Delete** the “Unable to Process” transactions, click the **Process Records** tab. Click the **Delete Unable to Process** button.



# DonorSnap

Donor Management Made Easy

When someone submits a form, it does not Automatically flow in to the database. You, as the DonorSnap administrator, have to **Process** that form.

Now with your list of Open Records in front of you, you need to **EDIT** each record, to see if the contact currently exists in your DonorSnap database (otherwise the program would add the contact as a NEW contact, duplicating records, and you do not want that).

Register User	Form Submitted	Load Contact Info DonorSnap	DonorSnap Contact #	Credit Card Message	(Contact) First Name	(Contact) Last Name
<a href="#">Edit</a>	GUEST	6/17/2014 11:57:45 AM		Pending	Frances	Taylor
<a href="#">Edit</a>	GUEST	6/17/2014 12:01:35 PM		Approved	Jeff	Taylor
<a href="#">Edit</a>	GUEST	6/17/2014 12:01:35 PM		Pending	Patricia	Morgan
<a href="#">Edit</a>	GUEST	6/17/2014 12:01:35 PM		Approved	Barry	Jones

Update Existing Contact  
Add as New Contact  
Form field data is different then Current Contact data

Click the **Change Contact** button. Look up the **Last Name** under Contact, find the contact on the list and click to Select it, click the **Assign Current Contact #** button at the top of the screen.

Current Contact: [ NOT ASSIGNED ] [Assign Current Contact #](#)

Current Selected Contact --> Jones, Barry [338]

Status: Active Only [Clear Filters](#) [Clear Sort](#) Currently Showing Items 1 to 9 of 9

Contact #	Contact	E-Mail
	jones	
▶ 203	Jones, Tom [203]	
▶ 212	Jones, Frances [212]	francesjones@email.com
▶ 221	Jones, Jesse [221]	
▶ 253	Jones, Sam [253]	
▶ 332	Jones, Stephen [332]	
▶ 338	Jones, Barry [338]	bjones@email.com
▶ 45	Jones, Brian (Jones, Melvin, & Clark) [45]	
▶ 36	Jones, Richard (Making Mirrors) [36]	

In the event that the contact DOES NOT exist, simply click **Cancel**; the submission will add a NEW contact.



# DonorSnap

Donor Management Made Easy

This will bring you to a comparison page between what information was submitted on the form, and what information already exists in DonorSnap.

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

**DonorSnap Contact: Jones, Barry [338]** [Change Contact](#) [Remove Contact](#)

	User Entry	DonorSnap Value
First Name:	Barry	Barry
Last Name:	Jones	Jones
E-Mail:	bjones@email.com	bjones@email.com
Address Line 1:	1155 Simpson Blvd	
Address Line 2:		
City:	San Mateo	
State/Province:	CA	-- Choose --
Zip/Postal Code:	94402	
Phone Number:	650-450-7964	650-450-7964
Amount:	1,000.00	
To which program:	Capital Campaign	
Comments:		
Date Received:	6/17/2014	
Donation Type:	Donation	
Payment Method:	Online - AP	
Batch Code:	Received online thank you letter	
Accounting Code:		

And once that is saved, return to the list of **Open Records**. Using the key at the bottom of the page, the line is now WHITE, indicating that this form will update his Existing Record.

Register User	Form Submitted	Load Contact into DonorSnap	DonorSnap Contact #	Credit Card Message	(Contact) First Name	(Contact) Last Name
<a href="#">Edit</a>	GUEST	6/17/2014 11:57:45 AM	<input type="checkbox"/>	Pending	Frances	Taylor
<a href="#">Edit</a>	GUEST	6/17/2014 12:01:35 PM	<input type="checkbox"/>	Approved	Jeff	Taylor
<a href="#">Edit</a>	GUEST	6/17/2014 12:11:15 PM	<input type="checkbox"/>	Pending	Patricia	Morgan
<a href="#">Edit</a>	GUEST	6/17/2014 12:12:16 PM	<input checked="" type="checkbox"/>	Approved	Barry	Jones

Page size: 25

[Update Existing Contact](#)  
[Add as New Contact](#)  
[Form Field data is different then Current Contact data](#)

**Now Barry's line is in White indicating that the form will be updating his existing record.**



# DonorSnap

Donor Management Made Easy

Once you have Edited each of your form submissions to match up with their existing records (or not), click all the forms you are ready to load in to DonorSnap, click the **Save Load Selections** at the top of the screen.

Register User	Form Submitted	Load Contact into DonorSnap	DonorSnap Contact #	Creation Message	(Contact) First Name	(Contact) Last Name
<a href="#">Edit</a> GUEST	6/17/2014 11:57:45 AM	<input type="checkbox"/>		Pending	Frances	Taylor
<a href="#">Edit</a> GUEST	6/17/2014 12:01:35 PM	<input checked="" type="checkbox"/>		Approved	Jeff	Taylor
<a href="#">Edit</a> GUEST	6/17/2014 12:11:15 PM	<input type="checkbox"/>		Pending	Patricia	Morgan
<a href="#">Edit</a> GUEST	6/17/2014 12:12:16 PM	<input checked="" type="checkbox"/>	338	Approved	Barry	Jones

## Process Records

Click the **Process Records** tab.

Click the **Load Records** button.

# of Records Selected: 2  
[Contacts to Add: 1]  
[Contacts to Update: 1]

[Load Records into DonorSnap](#) [Export Records to Excel](#)

And if you have any to delete, those can be deleted from here as well.

NOW, donations have been processed and loaded in to DonorSnap.



## Acknowledgement Letters

One final step..... almost done...

Now that donations have been added to DonorSnap through the Online Forms, the program still Wants to Print Thank you letters, because those donations come through as UN-acknowledged.

If you are using the Acknowledgement system within DonorSnap, you should now have an alert on your Dashboard that there are “Acknowledgement Documents Waiting”

EVEN IF you do not want to print a Thank you letter, the program will alert you anyway. Now we need to “Acknowledge” those donations, regardless of whether you print a letter.

### Processing > Documents and Labels > Donation Acknowledgement Letters

If everything was set up correctly and you included a **Batch Code** for “Received Online TY”, you should now see those donations listed here.

In my case, I have one letter to print, and two that “Received Online TY” (the two that I just processed through my form), which I do not want to print letters for.

[Help Page](#) [Help 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
1	General donation thank you letter	Excel	Generate	Flag Update
2	Received online thank you letter	Excel	Generate	Flag Update

**Select Document for Mail Merge:**  
General Thank you.doc  
Membership Thank You Letterhead.doc

**Select output format:**  
 DOC - Microsoft Word 97-2003 Document  
 DOCX - Microsoft Office 2007 / 2010

**IF you want to print letters, you can do so from here.**

**Click the Flag Update button**

Click the **Flag Update** button for that line, Acknowledging the donations, and removing the alert to print letters.