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 3rd 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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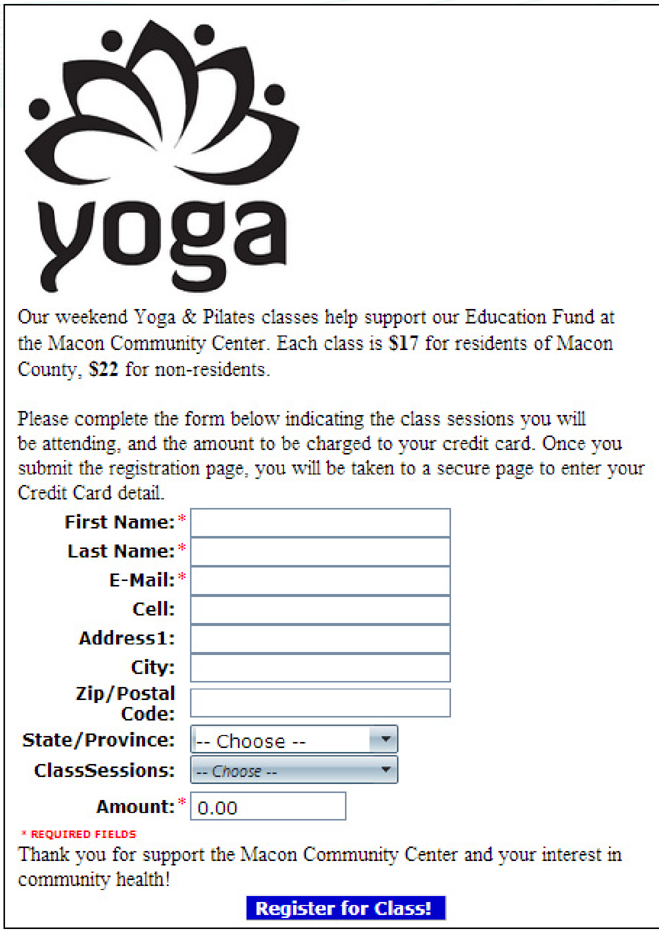
The Point: To turn this form, into a submission in the database:



yoga

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.

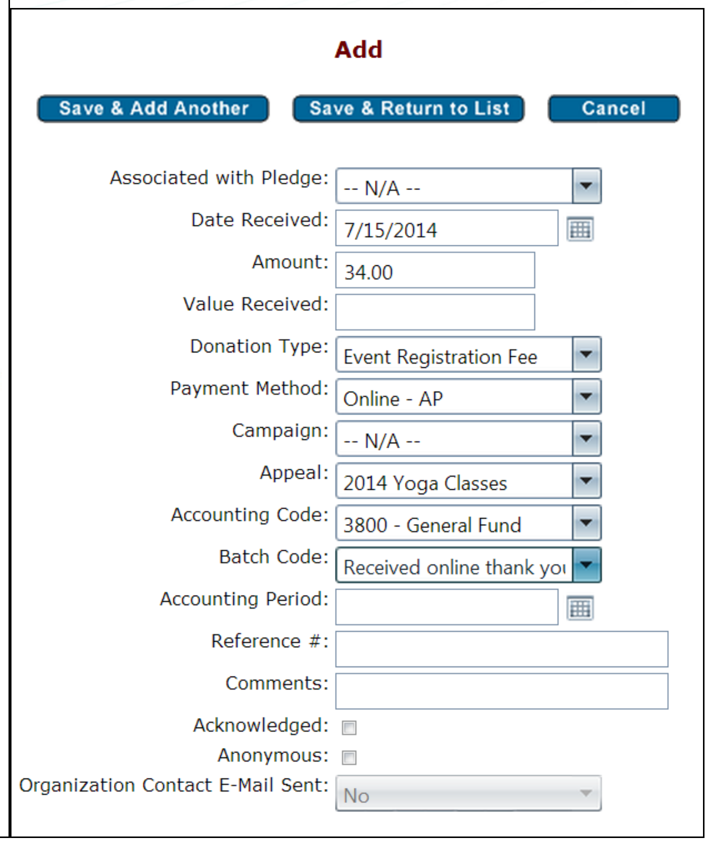
Please complete the form below indicating the class sessions you will be attending, and the amount to be charged to your credit card. Once you submit the registration page, you will be taken to a secure page to enter your Credit Card detail.

First Name:*
Last Name:*
E-Mail:*
Cell:
Address1:
City:
Zip/Postal Code:
State/Province: -- Choose --
ClassSessions: -- Choose --
Amount:* 0.00

* 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 yo
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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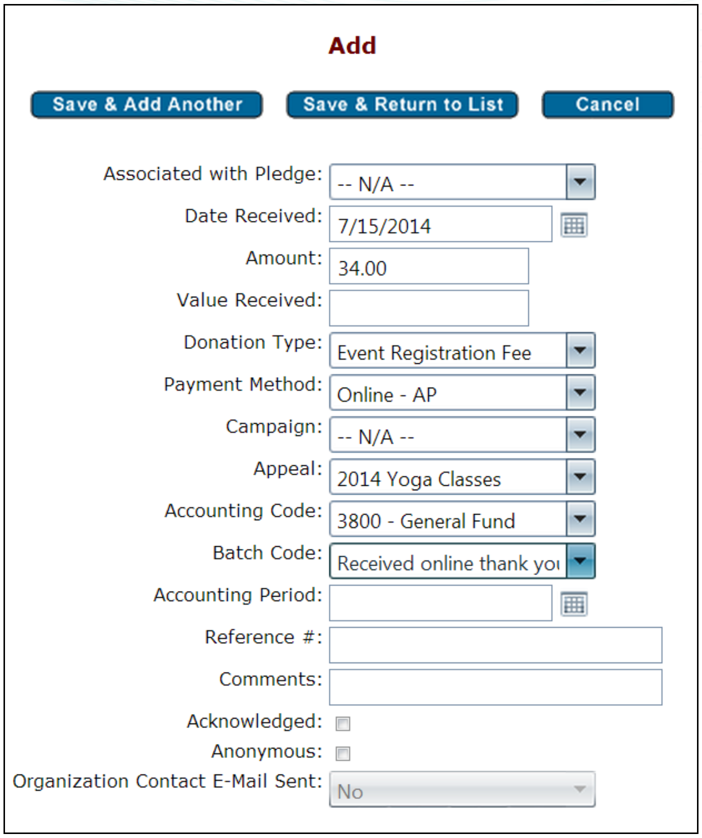
Donation (Financial) Forms:

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.

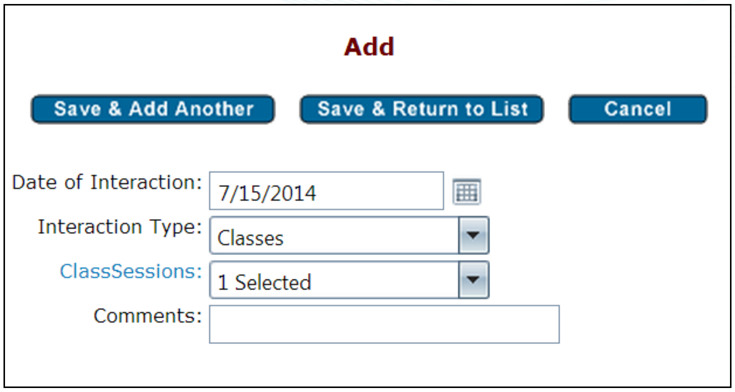
Regardless of your process, **DonorSnap will want to print a letter for you**. When a Donation comes in through an online form, it is considered “UN-Acknowledged”, which triggers an alert on the Dashboard to print a Thank you letter.

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.

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.



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 <u>All My Classes</u> 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.

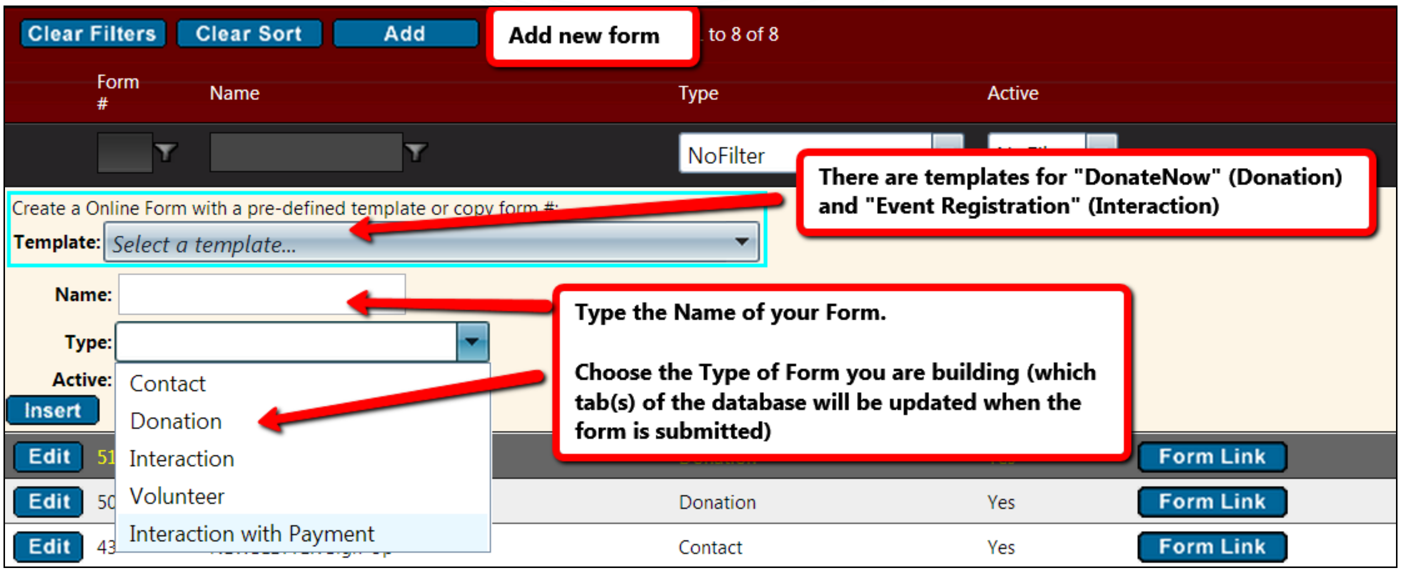
*** This form is all about where you are storing your Event-related data within your database. Most organizations do not need an Interaction + Payment form, but it is a third option available to you.

Build Your Form

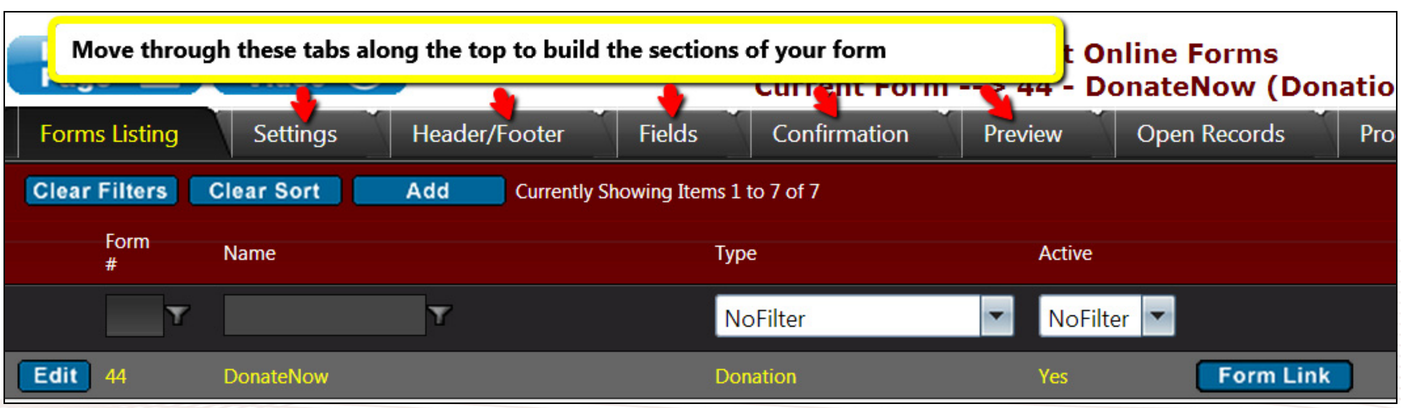
Online Forms > Standard Forms (or Recurring, if you're building a Recurring form)

-- 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



Start Building your Form



www.DonorSnap.com
Message Center: 262-696-9158
feedback@donorsnap.com

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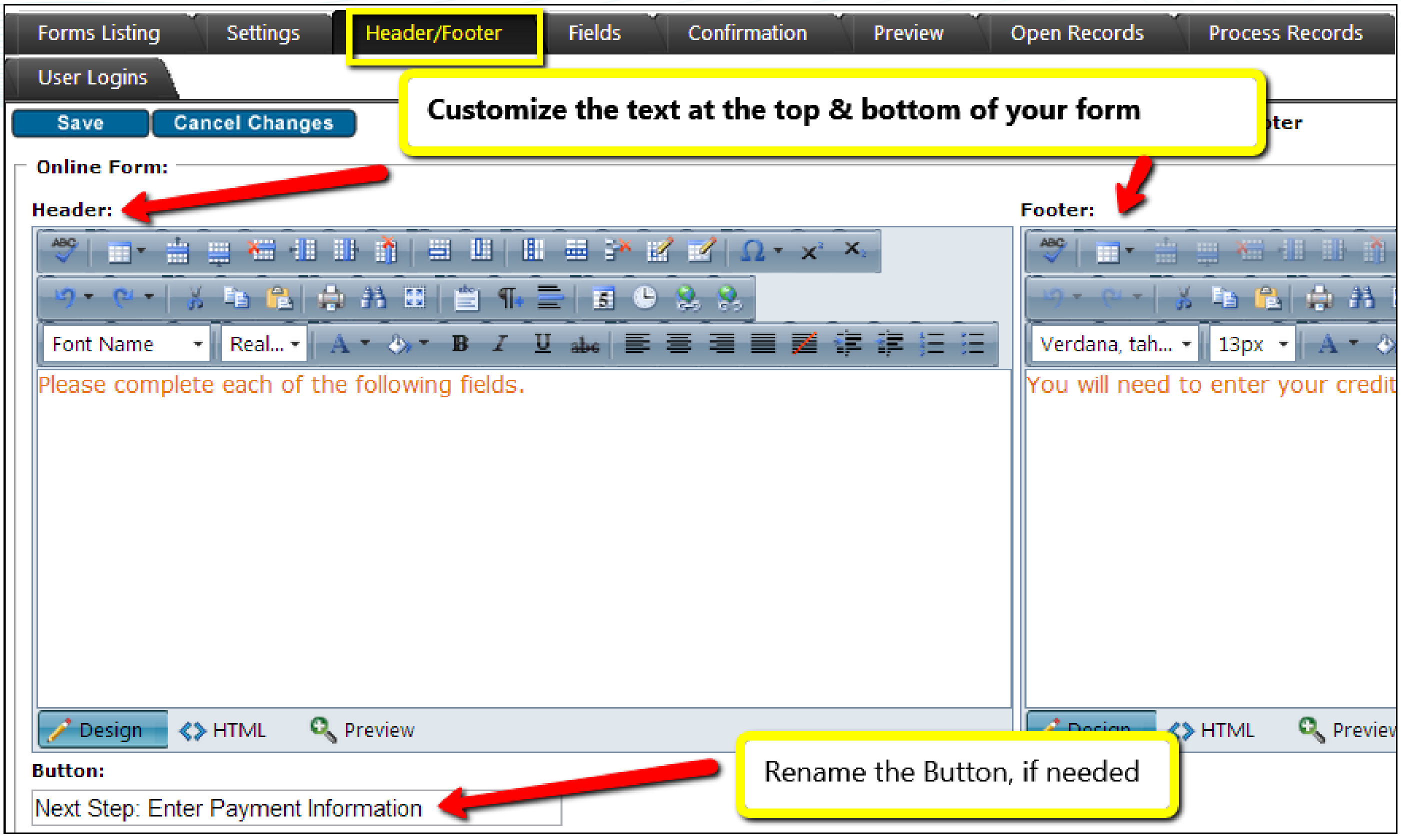
Customize your Settings

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 <u>another form</u>, 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.

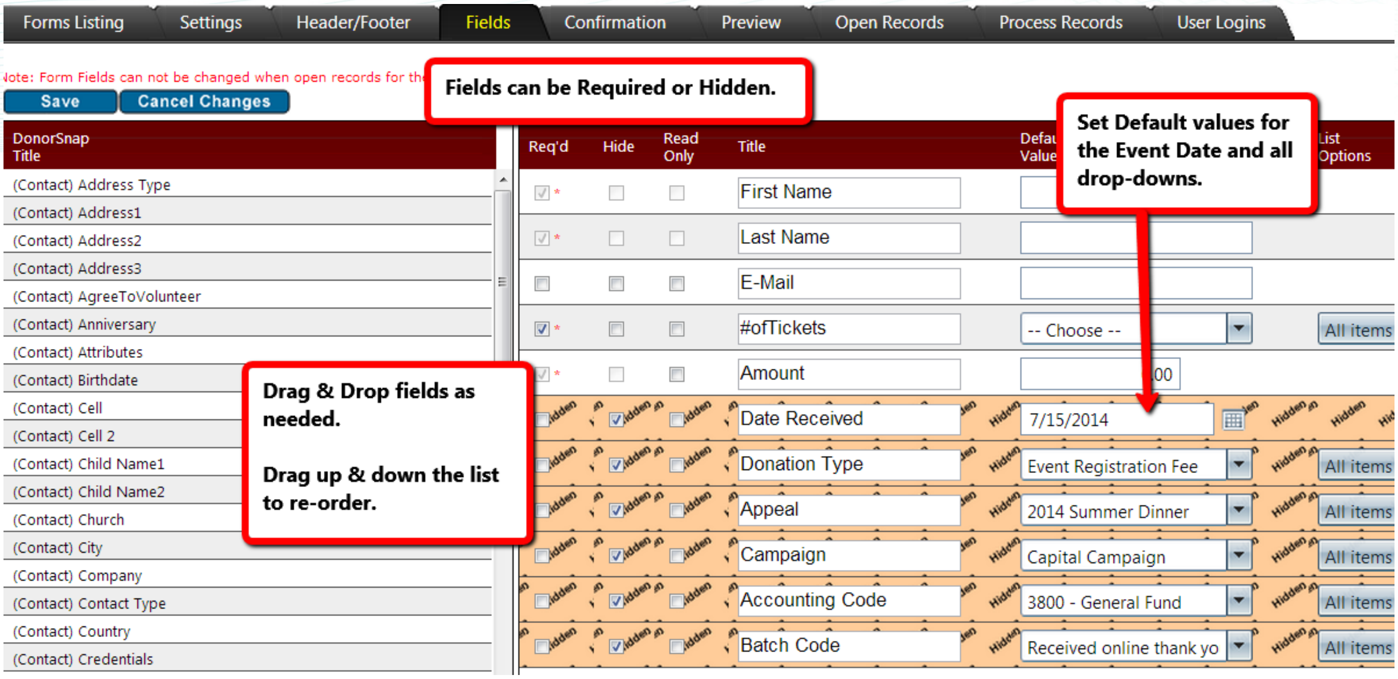
Customize the Header/Footer



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!** ☺

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



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

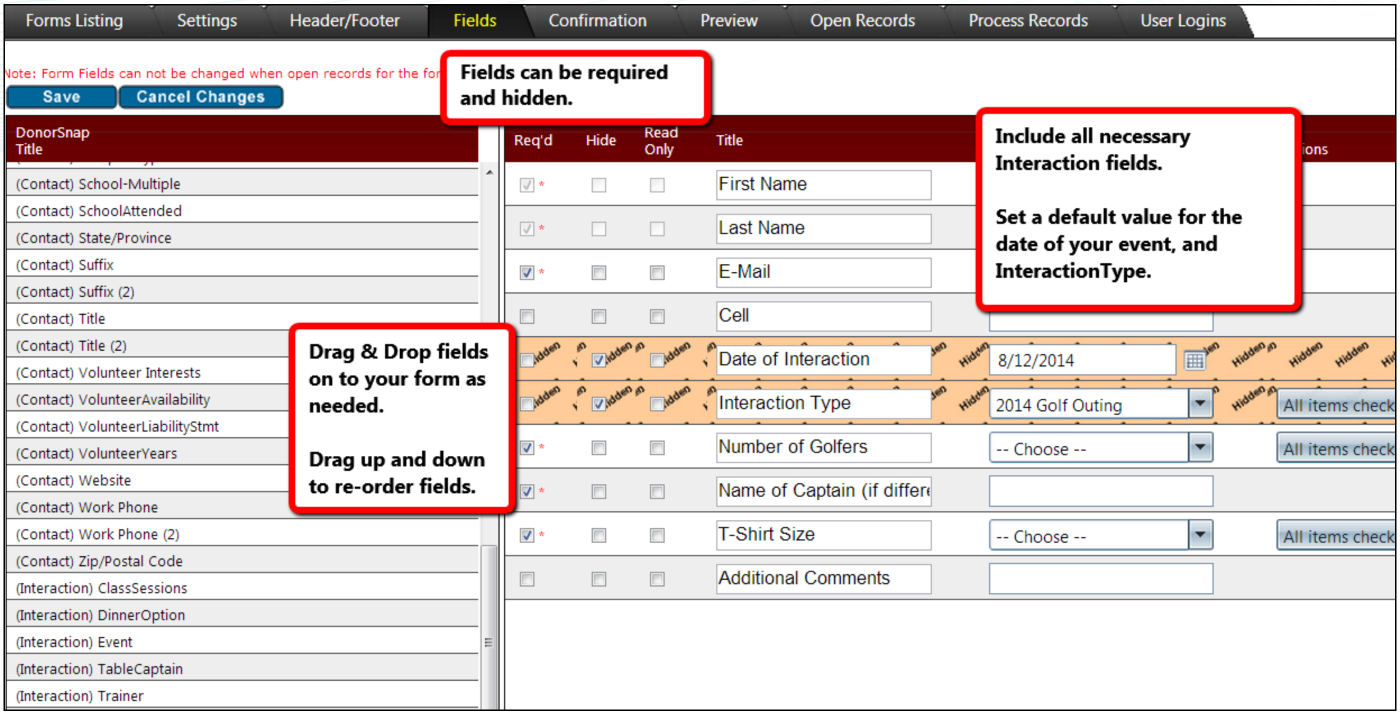
Rename fields: Customize your fields for a more personal feel, such as "#ofTickets" could be renamed to: How many tickets?

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:



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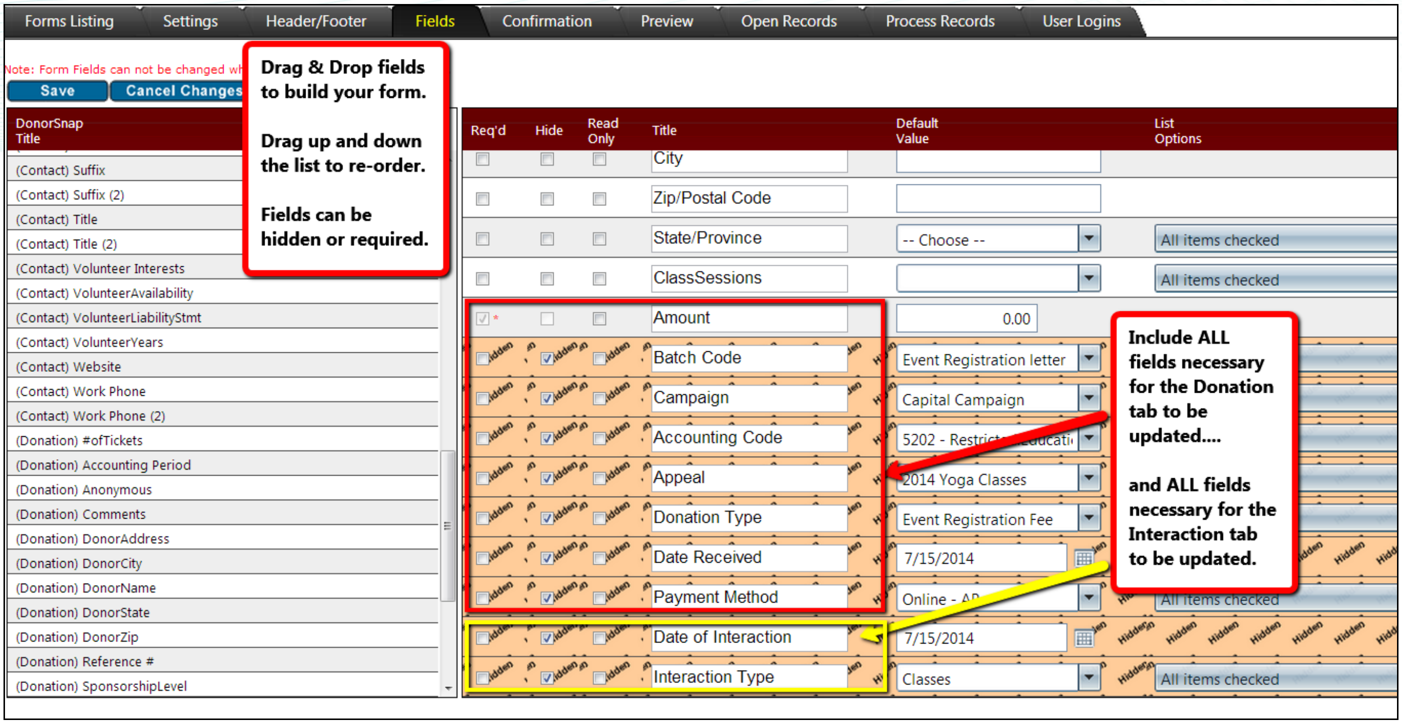
If you are building an Interaction + Payment form, add fields:



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.

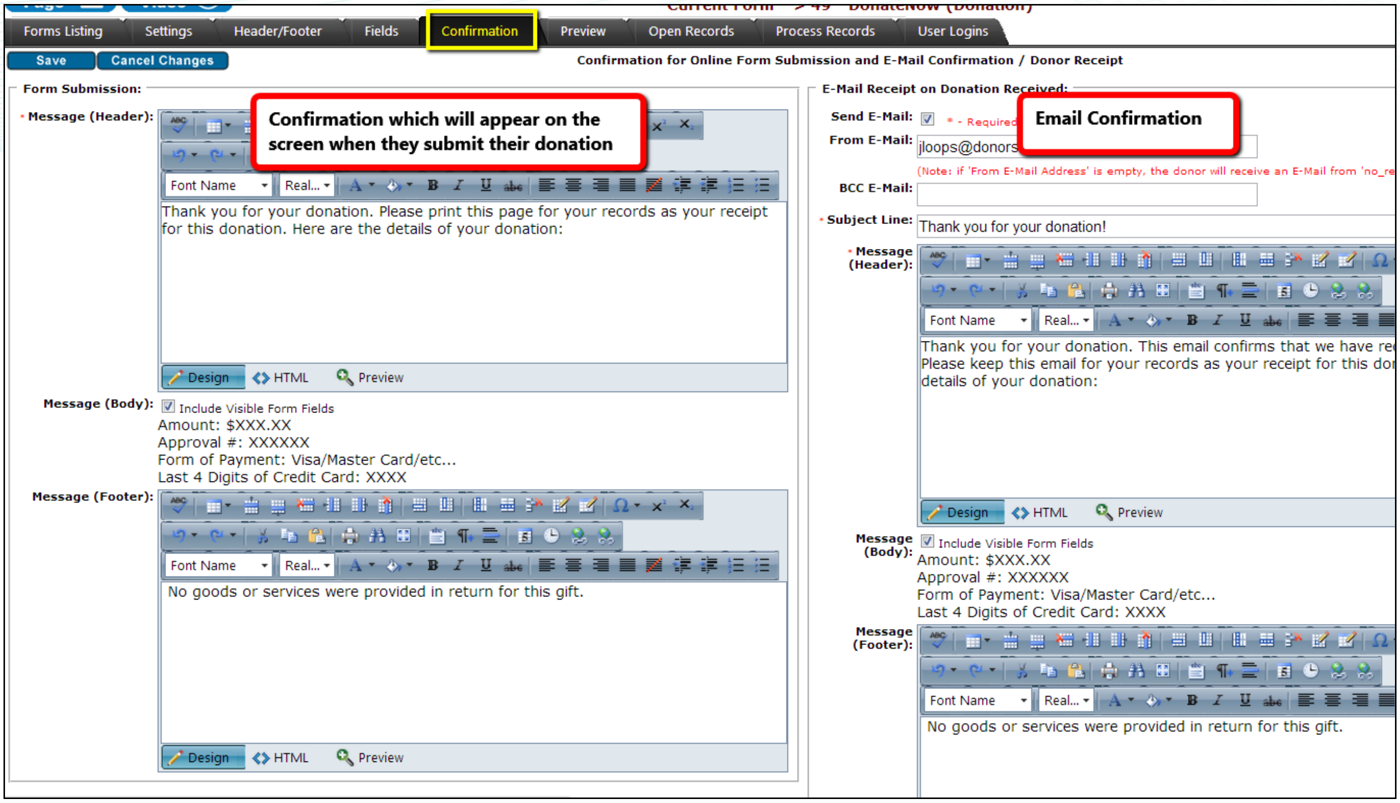
Drag & Drop fields as needed, to add and remove from your form. Drag fields up & down the list to re-order.

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.

Build your Confirmations



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.

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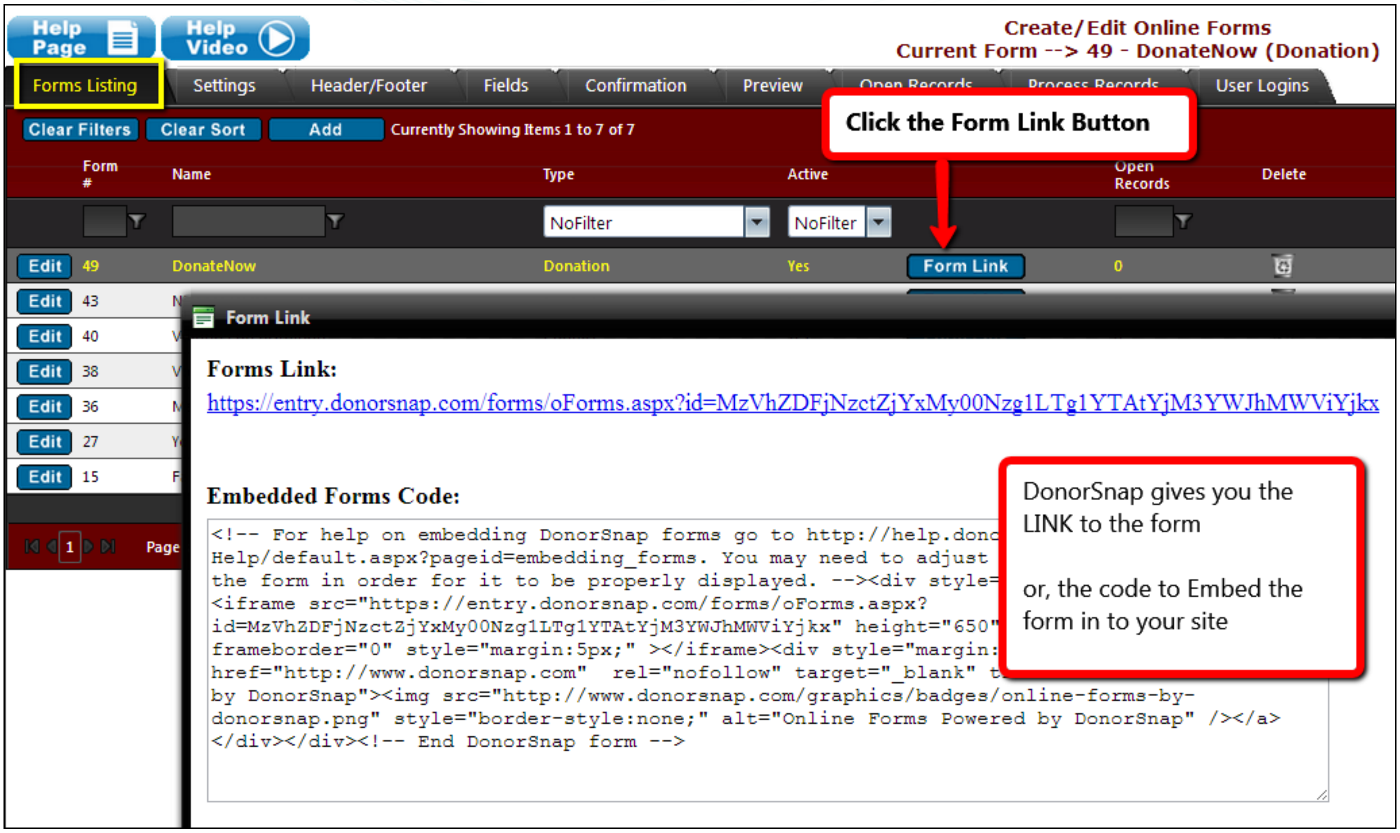
Put the Form on your Website

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.



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

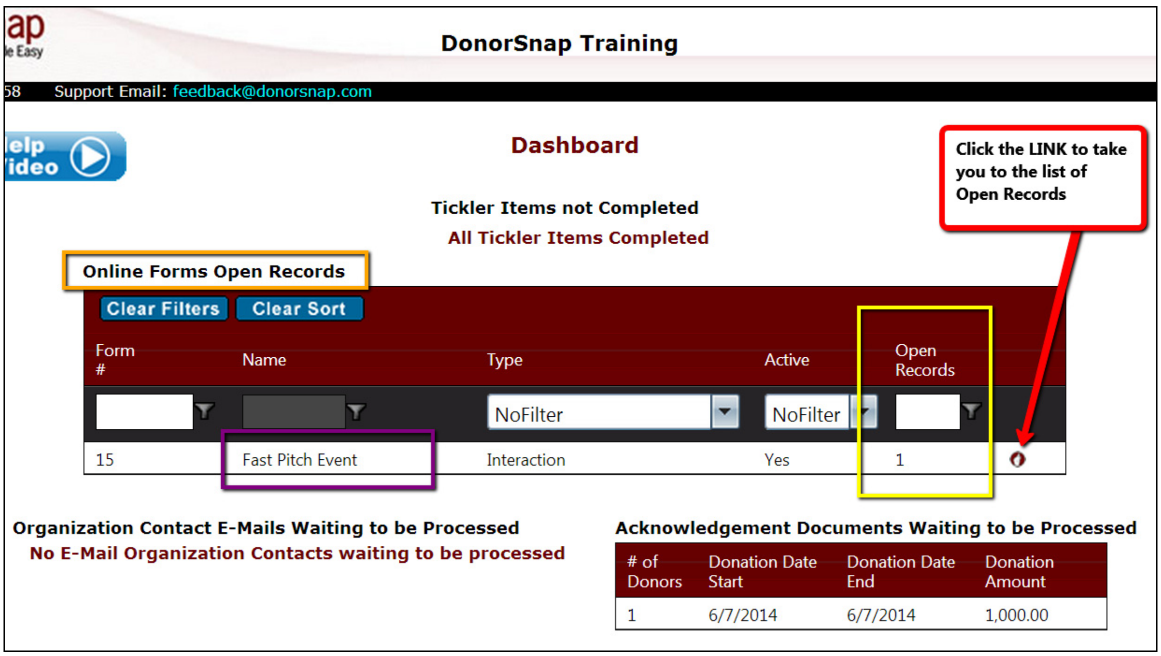
Process Forms

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.



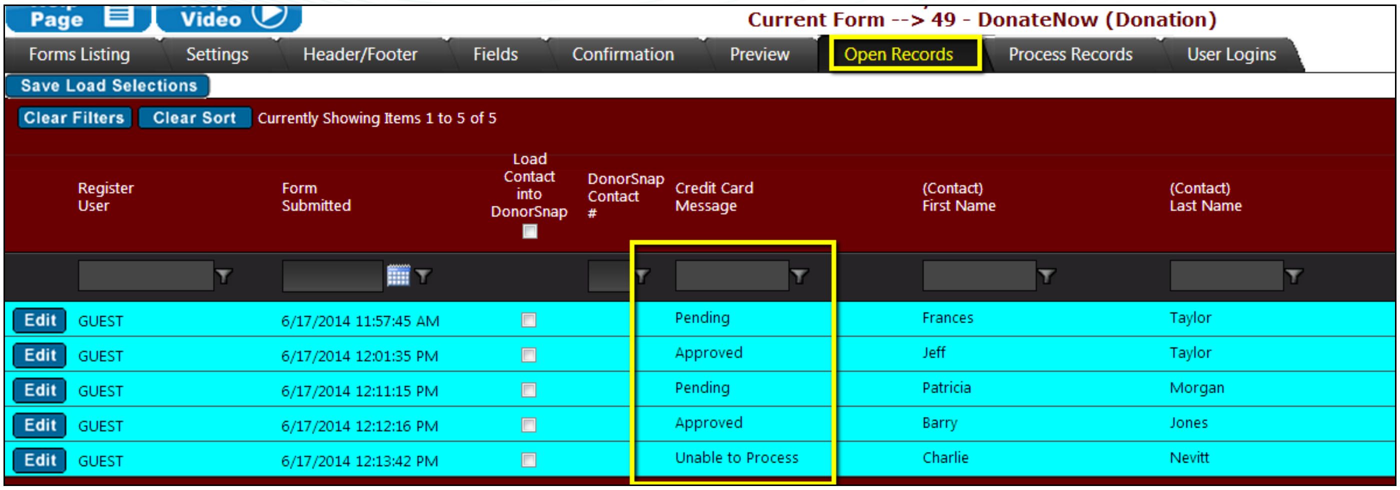
To turn on this alert:

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.

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.



	Register User	Form Submitted	Load Contact into DonorSnap	DonorSnap Contact #	Credit Card Message	(Contact) First Name	(Contact) Last Name
Edit	GUEST	6/17/2014 11:57:45 AM			Pending	Frances	Taylor
Edit	GUEST	6/17/2014 12:01:35 PM			Approved	Jeff	Taylor
Edit	GUEST	6/17/2014 12:11:15 PM			Pending	Patricia	Morgan
Edit	GUEST	6/17/2014 12:12:16 PM			Approved	Barry	Jones
Edit	GUEST	6/17/2014 12:13:42 PM			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. <u>You cannot delete a Pending transaction</u>. 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.

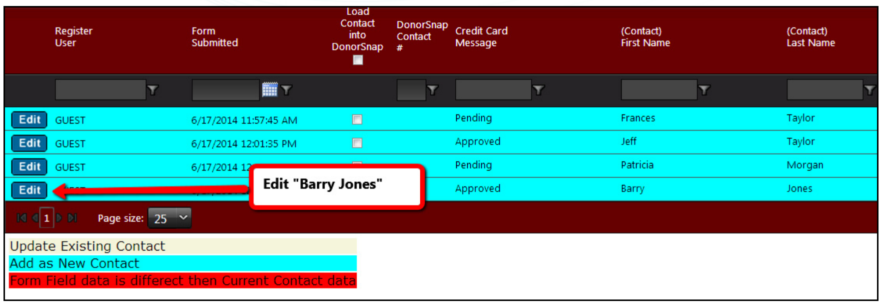
Unable to Process: Means the Contact did not enter a valid credit card. They submitted the first page of the form, but the card was either declined or the page was closed before completing their payment information.

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

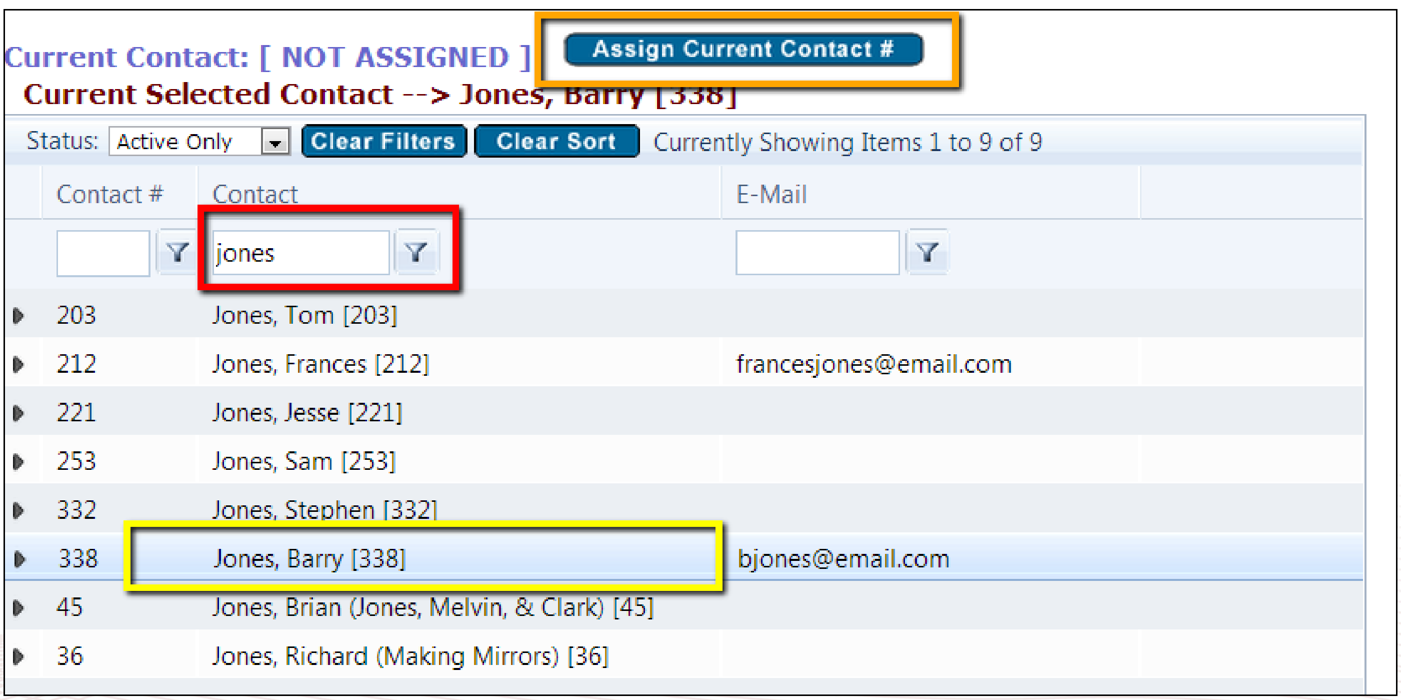
To Delete the "Unable to Process" transactions, click the **Process Records** tab.
Click the **Delete Unable to Process** button.

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).

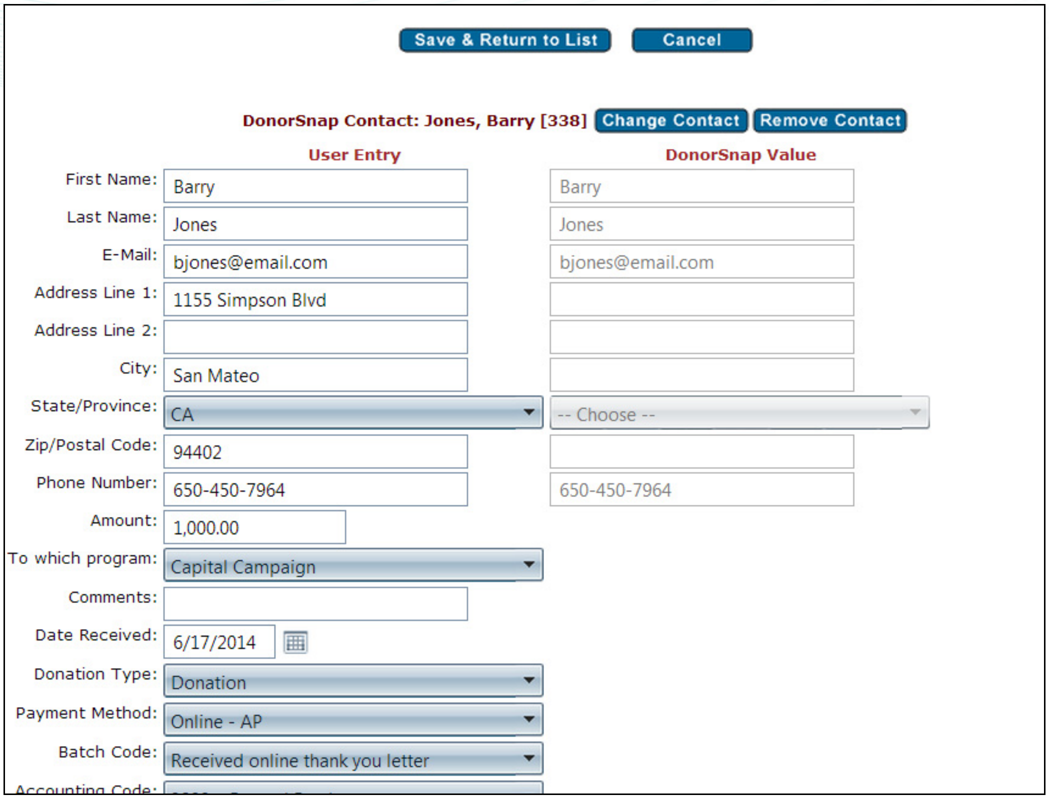


Click the **Change Contact** button. Look up the **Last Name** under Contact, find the contact on the list and click to Select it, click the **Assign Current Contact #** button at the top of the screen.

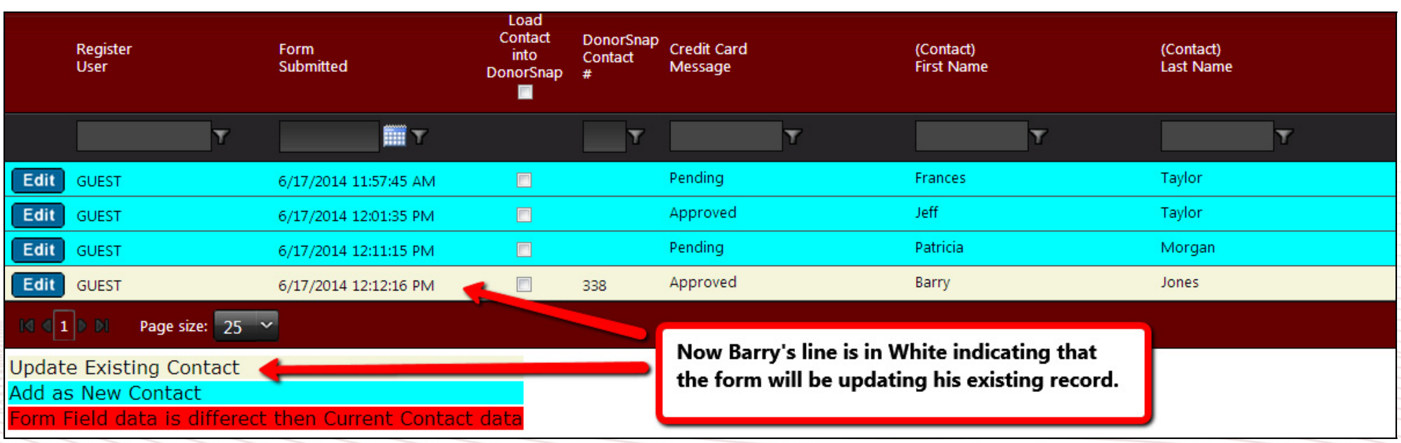


In the event that the contact DOES NOT exist, simply click **Cancel**; the submission will add a NEW contact.

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



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.



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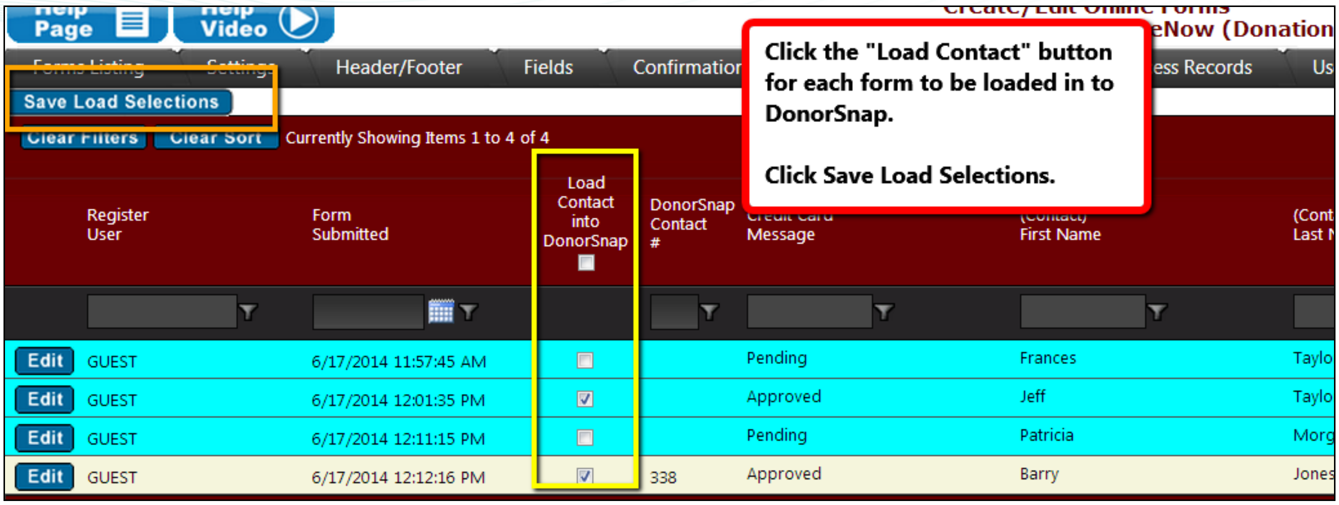
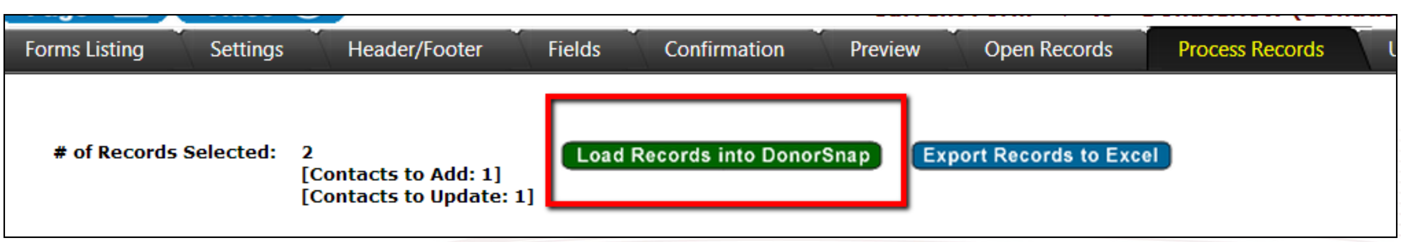
Once you have Edited each of your form submissions to match up with their existing records (or not), click all the forms you are ready to load in to DonorSnap, click the **Save Load Selections** at the top of the screen.



Process Records

Click the **Process Records** tab.

Click the **Load Records** button.



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.

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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.

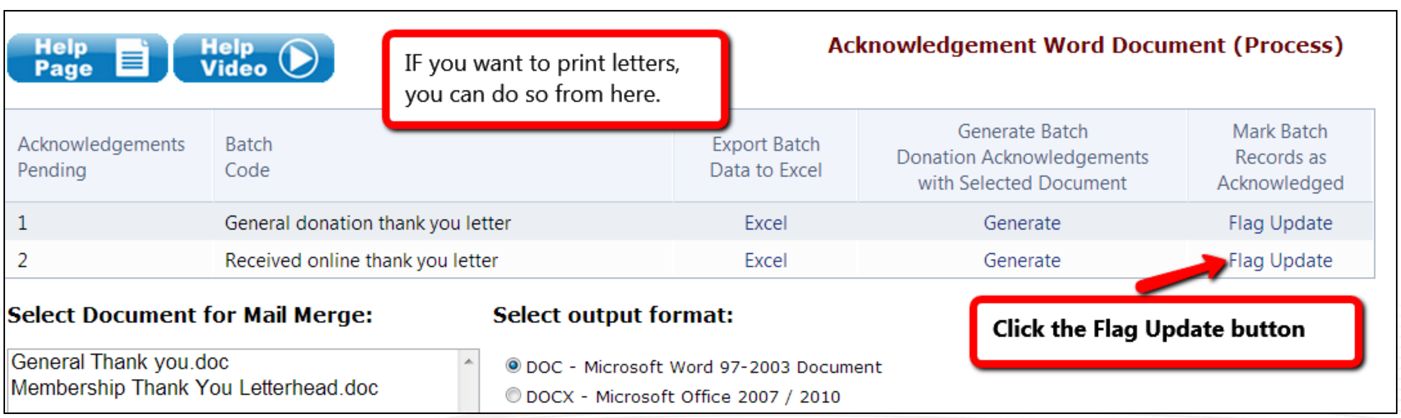
If you are using the Acknowledgement system within DonorSnap, you should now have an alert on your Dashboard that there are “Acknowledgement Documents Waiting”

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.



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