



Customizing Your Database

Each organization has their own needs for information tracked about Donors, Volunteers, and Events, and DonorSnap allows full customization of the database ([Add User Defined Fields](#)) and the information you are sorting & filtering on ([Customize Grids per User](#)). You can track what information you need, and run reports on any field within the database.

Customizing the Contact Screen

Use the Contact screen to define statements about your contacts (roles within the organization, credentials, mailing options and communication preferences, membership and sponsorship information, volunteer information, etc.)

Contact Information:	
ContactIPK: 216	Attributes: Teacher,Volunteer
Contact Type:	Credentials:
Company:	Church:
First Name: Miles	EmailLists: General Newsletter,Volunteer Requests
Last Name: Anderson	MailCode:
First Name (2):	Address1: 123 Any Street
Last Name (2):	City: Chrome
Name Resolution Override: On	State/Province: OR
Salutation: Miles	Zip/Postal Code: 97552
Acknowledgement: Dr. Miles Anderson	Organization Contact:
ProspectType:	Child Name1:
JobTitle:	Child Name2:
Employer:	MembershipType: Family
Phone:	MembershipExpiration: 5/1/2014
Work Phone:	MembershipBegan:
Work Phone (2):	Volunteer Interests: Stuffing Envelopes,Sports,Spring Fling
Cell:	VolunteerAvailability: All
Cell 2:	PhotoRelease: Yes
E-Mail: milesanderson@donorsnap.com	EmergencyContact: Shana Williams 503-803-2266
E-Mail (2):	SchoolAttended:
Website:	GraduationYear:
Active: Yes	Birthdate:
Deceased: Yes	Anniversary:
Origination Date: 1/15/2007	School-Multiple:
Comments:	



DonorSnap

Donor Management Made Easy

Each User can have their own screen layouts (what fields are visible when they log in).

For example, a Volunteer coordinator may need to see the Volunteer-related fields, where as another user may need to see fields related to prospect-management. Each user can have a customized view if needed.

Current User --> Hansel

Help Page Help Video

Listing Rights **Screen Layouts** Keep & Share Calendar Setup

Page Display/Edit Settings: Allow User to Change Grid Settings Do Not Allow User to Change Grid Settings)

Note: Groupings are color coded, all groupings will remain in that order.

Contact

Disabled Fields

- Address Type
- Address2
- Address3
- AgreeToVolunteer
- Contact Last Updated
- Contact Last Updated By
- Country
- Date Contact Added
- Default Accounting Code
- Default Acknowledged
- Default Anonymous

Enabled Fields

- ContactIPK
- Contact Type
- Company
- First Name
- Last Name
- First Name (2)
- Last Name (2)
- Name Resolution Override
- Salutation
- Acknowledgement
- ProspectType

SAVE CHANGES RESET Contact-Page Display/Edit Settings TO SITE DEFAULTS

RESET ALL SETTINGS TO SITE DEFAULTS

Maintenance > User Setup. Select the desired user. Click the **Screen Layouts** tab along the top.

Change the drop-downs on the left to read **Page Display** and **Which Tab** (Contact, Donation, etc.)

Move fields from the Disabled and Enabled boxes, and up and down the list, to customize the screen per user.

**** NOTE**** Set the default screen layouts under **Maintenance > Site-Setup > Screen Layouts**. Here you can hide fields not used, and change the order of fields on your screen, etc., for all users. However, if you set up user-specific screen layouts under the User Setup, those will override the default.



DonorSnap

Donor Management Made Easy

Customize the Interaction Tab

The interaction tab is used to track Non-Financial activity you have had with your donors - emails or mailings sent, non-paid event attendance, and many other options. Customize the **InteractionType** field (which is in black and comes installed with DonorSnap) under **Maintenance > DonorSnap Site Lookups**. Add additional fields under **Maintenance > Site-Setup > User Defined Setup**

Non-Financial Event Tracking:

The screenshot shows the 'Interaction' form in 'Add' mode. At the top, there are three buttons: 'Save & Add Another', 'Save & Return to List', and 'Cancel'. Below the buttons, the form fields are as follows:

- Date of Interaction: 8/15/2014 (with a calendar icon)
- Interaction Type: 2014 Summer Dinner (dropdown menu)
- Attendee: Miles (text input)
- TableCaptain: (checkbox)
- DinnerOption: Chicken (dropdown menu)
- Comments: probably bringing Shana (text input)

Non-Financial Class Attendance:

The screenshot shows the 'Interaction' form in 'Add' mode. At the top, there are three buttons: 'Save & Add Another', 'Save & Return to List', and 'Cancel'. Below the buttons, the form fields are as follows:

- Date of Interaction: 8/27/2014 (with a calendar icon)
- Interaction Type: Classes (dropdown menu)
- ClassSessions: 2 Selected (dropdown menu)
- Trainer: Stephanie Johnson (text input)
- Comments: (empty text input)



DonorSnap

Donor Management Made Easy

Some organizations will use the Interaction tab to track Grant pay-outs:

Interaction

Add

Save & Add Another **Save & Return to List** **Cancel**

Date of Interaction:

Interaction Type:

GrantName:

Amount:

AwardedTo:

CompletedDate:

Rules&Stipulations:

Comments:

Or even use the Interaction tab to track evaluations:

Interaction

Add

Save & Add Another **Save & Return to List** **Cancel**

Date of Interaction:

Interaction Type:

Who were you greeted by?:

Who was your instructor?:

Were the facilities clean and maintained?:

Were you given materials within a timely manner?:

How long was your class?:

Were you given two breaks as required?:

How would you rate your overall experience (1-5)?:

Were all your questions answered?:

Comments:



DonorSnap

Donor Management Made Easy

Customizing the Donation Tab

DonorSnap comes with many fields to help track your donations (Appeal, Campaign, Accounting Code, etc.), however you may need to add fields pertaining to specific donations, such as Membership Detail or Event Ticket detail. Remember that all organizations have different needs based on what reports you will need in the future. If you have questions about what is best for your organization, contact us as feedback@donorsnap.com.

Add

Save & Add Another Save & Return to List Cancel

Associated with Pledge: -- N/A --

Date Received: 8/12/2014

Amount: 100.00

Value Received:

Donation Type: Membership Dues

Payment Method: Credit Card

Campaign: Membership

Appeal: 2014 August Phone-A-Th

Accounting Code: 3800 - General Fund

Batch Code: Membership renewal lett

Accounting Period:

DonationMemberType: 1 Selected

DonationExpiration: 9/1/2015

Reference #: x5512

Comments:

Acknowledged:

Anonymous:

Add

Save & Add Another Save & Return to List Cancel

Associated with Pledge: -- N/A --

Date Received: 8/8/2014

Amount: 1,000.00

Value Received: 250.00

Donation Type: Sponsorship

Payment Method: Credit Card

Campaign: Capital Campaign

Appeal: 2014 Golf Tournament

SponsorshipLevel: Bronze

Accounting Code: 3800 - General Fund

Batch Code: General donation thank y

Accounting Period:

Reference #: x6632

Comments:

Acknowledged:

Anonymous:

Add

Save & Add Another Save & Return to List Cancel

Associated with Pledge: -- N/A --

Date Received: 8/16/2014

Amount: 300.00

Value Received: 150.00

Donation Type: Event Registration Fee

Payment Method: Check

Campaign: Capital Campaign

Appeal: 2014 Golf Tournament

Accounting Code: 3800 - General Fund

Batch Code: Golf Tournament Tix Thar

Accounting Period:

#ofTickets: 3

Reference #: #46775

Comments:

Acknowledged:

Anonymous:

Edit

Save & Return to List Cancel

Associated with Pledge: -- N/A --

Date Received: 7/16/2014

Amount: 100.00

Donation Type: Memorial Donation

Payment Method: Check

Campaign: -- N/A --

Appeal: -- N/A --

Accounting Code: 3800 - General Fund

Batch Code: Memorial donation thank

Reference #: #45512

Comments: Samuel Jones

RecipientName: Family of Samuel Jones

RecipientAddress: 244 Harrison Street

RecipientCity: New Bern

RecipientState: NC

RecipientZip: 26145

Acknowledged:



DonorSnap

Donor Management Made Easy

Notes to Consider:

You can add nearly an unlimited number of User Defined fields (technically 210 fields per screen); and 30 of each Type of field (Text box, Date field, etc.). The key is finding the most efficient way of grouping information together.

For example, instead of multiple check-boxes for “General Newsletter” or “Volunteer Newsletter”, consider adding a Multiple-Select drop-down for “Newsletter Options” which combines all those together.

Single/Multiple Select:

Use a **Single** select with questions answered once, such as Gender, what Church they attend.

Use a **Multiple** select for options where they can have multiple answers, such as Attributes (Board member and Volunteer at the same time), Volunteer Interests, Newsletter Options, etc.

Text Box vs. Drop –Down:

Consider consistency in your data-entry. If you allow a text box, your staff can enter anything, such as abbreviations. So when you are searching for “New Bern Prep” and someone has typed in NBP, that contact will not appear on results. If this is a concern, consider creating a Drop-down instead.

If you have over 200 churches, maybe this is too many for your drop-down (the drop-down is unlimited, but 200 is still a Very Long list), and a text box might be a better option.

Age/Birthdate and Grade/GradYr

Use a “Birthdate” field (which remains constant) instead of “Age”. Age will not roll over year to year, so you will need to update and maintain that.

Same with Grade & Graduation year; if you use a Grade field, this will not change year to year and you will need to maintain. Where as a Graduation year will remain consistent.

with Grade-specific information, consider using the **Interaction tab to track specific grade activity because this is based on a date. This Year Emily is in 2nd Grade and her teacher is Ms. Jones. This way you’re tracking her current class and can add another interaction for her class next year, but her Contact screen maintains the more general Graduation Year.

Once a field has been added (and saved) you cannot change the type of field (for example, changing from Text box to Drop-Down). You will need to delete the old field and add a new one. So it’s important to have a good structure in the beginning, to save you clean-up hassle down the road.



Customizing your Grid Settings

When you access **Community > Contacts**, this “listing” is what we call a **Grid**.

This grid is the “Contact Grid”; when you click the Donations tab for a contact, that is called the “Donation Grid”. Each tab has its own grid and each grid can be customized **Per User**.

Customize your user-specific grid settings under **Home > User Settings** (will pull up the grid settings for the User currently logged in):

Home Community Reports Processing Online Forms

DonorSnap Training

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

Help Page Help Video

Contact Page - Default Grid Fields Additional Site Options Password/E-Mail Change

Contact Page - Default Grid Fields

These are the Grid Fields you will see on the different tabs under *Community/Contacts*.
Note: This will override any site settings for default grid layouts.

(Note: Only the top 20 fields in the Selected Contact Listing Fields will be saved)

Contact

Available Grid Fields

- Acknowledgement
- Active
- Address Type
- Address2
- Address3
- AgreeToVolunteer
- Anniversary
- Attributes
- Birthdate
- Cell
- Cell.2

Grid Fields Selected

- Contact Type
- Company
- First Name
- Last Name
- Address1
- City
- State/Province
- YTD Donation Amount
- Last Donation Amount
- Last Donation Date

NOTE that you can also change the **Default** grid settings under **Maintenance > Site-Setup > Screen Layouts**. This will set the grid for all users of your site.

However, if they customize their User grids, those changes will override the default in the Site-Setup.

Also, you can remove the ability for users to change their own grids, under **Maintenance > User Setup**, click the desired user, **Screen Layouts** tab.

Benefits to having user-specific grids:

Front Desk staff, for example, could look up **Community > Contacts** to verify current membership level and expiration date (but not need to see other financial totals or other contact information).

Administrators may pull fields to their grid for “ContactLastUpdatedBy” and “ContactLastUpdatedDate” that other staff members do not need to see.