Getting Started with DonorSnap Checklist

1. Set up all your DonorSnap **Users** and their **Rights** to the database and feature menus. **Maintenance > Site-Setup > User Setup** (Videos)
2. Once logged in as Your User, customize your **Dashboard Apps**
    a. For the user handling Acknowledgements, add the app for Acknowledgements Pending.
    b. If you are using Online Forms, add the app for Online Forms Open Records.
    c. EDs and Administrators may want to add apps for Recent Donations/Top Donors. Build **Goals** related to your Appeals & Campaigns.
3. Once logged in as Your User, customize your individual Grids (what appears on the "listing" tab when you go to Community/Contacts). **Home > User-Settings**
4. Create your Thank You letters in Word and upload in to the program (Video)
5. Edit drop-downs for **BLACK** DonorSnap fields (DonationType, Appeal, Accounting Code, etc.) under **Maintenance > Site-Setup > DonorSnap Site Lookups** (Video)
6. Add additional **BLUE** fields to the program (Attributes, Volunteer Interests, Birthdate, etc.) under **Maintenance > Site-Setup > User-Defined Controls** (Video)
7. Add your Organization Contacts (where you assign an individual contact to a Board member or Key Staff member) under **Community > Organization Contacts**. (Video)
8. Run a Duplicates report. **Reports > Administrative Reports > Duplicates Reports** to see what duplicates you may have in the system. Run a variety of the different reports, print them out, and go research. (Video)
9. Set your System date. Go to **Maintenance > Site-Setup > Additional Site-Options**. At the bottom click the button for **Change Options** and enter your End Of Year date in the field.
10. Start watching the Webinars under **Help > Past Recorded Webinars**, and sign up for FREE trainings as part of our Wednesday Webinar series.

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

Help Videos

Remember that every page of DonorSnap has written page help and help video with the BLUE buttons in the top left; AND that all of these videos (and more) are located under the **Help** menu at the top of the page. But here are a few links to videos to help get you started:

Donation Information

Explanation of fields on the Donation tab:
http://help.donorsnap.com/donorsnap-help/default.aspx?pageid=donation_tab_video

How to use the Accounting Code & Donations Received report to coordinate with your accounting program: http://help.donorsnap.com/donorsnap-help/default.aspx?pageid=accounting_code_video

Setting up the Batch Code for your acknowledgement letters:
http://help.donorsnap.com/donorsnap-help/default.aspx?pageid=batch_code_video

In training you learned how to open a contact and add a donation to their record.
DonorSnap also has a **Mass Entry** tool, entering donations in a batch or based on a specific donation type, instead of opening a contact record. Click Here to learn more.

Are you Using Online Forms:

Online Forms is already built into DonorSnap! Start building "register to volunteer" forms now! But if you're interested in creating forms capturing a donation, you'll first have to have an account with Accelerated Payments: http://xchargepayments.com/donorsnap/

Then watch this webinar on Best Practices for building Online Forms.

Cleaning Up

You can make mass changes to information on the contact screen (fix typos or Capital letters, make changes to fields like Contact Type, Attributes, or how the Acknowledgement field is populated). Requires a process of exporting to Excel, making changes in Excel, and re-importing the spreadsheet.
http://help.donorsnap.com/donorsnap-help/default.aspx?pageid=update_contact_information_with_excel_import_video

Watch this webinar for more information on ways to Clean Up your Database

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