



DonorSnap

Donor Management Made Easy

Dashboard Apps

DonorSnap's Dashboard is the **Home Page** of the program, the first page that appears when you log in to the program, which you can return to by clicking **Home** along the top menu.

ACKNOWLEDGEMENTS PENDING

# of Donors	Donation Amount	Batch
1	500.00	General donation thank you letter
1	100.00	Membership renewal letter

[Go to Donation Acknowledgement Letters](#)
[Go to Email PDF Acknowledgements](#)

QUICK SEARCH

[Customize your search settings](#)

FAVORITE PAGES

- [Mass Entry](#)
- [Contacts](#)
- [DataMiner Platinum](#)
- [Donations Received](#)
- [Donations Strata](#)
- [Labels / Text Letters](#)

CAPITAL CAMPAIGN

Start: 01/01/2014 End: 12/31/2015

\$6,050 of \$10,000

NEW CONTACTS

Start: 01/01/2014 End: 12/31/2015

38 of 100 Contacts

RECENT DONATIONS

Donor	Amount	Date
Mr. Brett & Megan Bushnell	500.00	12/3/2014
Mr. & Mrs. James Bell	100.00	12/3/2014
Mr. Marcus Land	50.00	11/12/2014
Mr. & Mrs. Lawrence Bolick	100.00	10/22/2014
John Abbott	0.00	10/3/2014

TOP DONORS

Donor	Lifetime	Year to Date
Lauren Kelley & Jane Smith	41,775.00	0.00
Ms. Mary Yonce	15,000.00	0.00
Mr. Sydney Luchetti	14,937.50	0.00
Dr. Alexander Keith	14,190.00	0.00
Emily & Patrick Stevens	11,275.00	0.00

ONLINE FORMS OPEN RECORDS

Form #	Name	Type	Open Records
50	Donate-MaconCoParks	Donation	1
38	Volunteer Sign-In	Volunteer	1

KEEP & SHARE CALENDAR

Today

Month: no weekends December 2014 Training Schedule

Monday	Tuesday	Wednesday	Thursday	Friday
Trainings Available 1 • None	Trainings Available 2 • None	Trainings Available 3 • None	Trainings Available 4 • None	Trainings Available 5 • None
Trainings Available 8 • None	Trainings Available 9 • 9am EST (8am CT) • 1pm EST (12pm CT/10am PT)	Trainings Available 10 • 9am EST (8am CT) • 11am EST (10am CT)	Trainings Available 11 • 9am EST (8am CT) • 11am EST (10am CT)	Trainings Available 12 • 9am EST (8am CT) • 11am EST (10am CT/8am PT)
Trainings Available 15 • 9am EST (8am CT) • 11am EST (10am CT)	Trainings Available 16 • None	Trainings Available 17 • 9am EST (8am CT)	Trainings Available 18 • 9am EST (8am CT) • 11am EST (10am CT)	Trainings Available 19 • 9am EST (8am CT) • 11am EST (10am CT/8am PT)
Trainings Available 22	Trainings Available 23	Trainings Available 24 None	Trainings Available 25 HAPPY HOLIDAYS!	Trainings Available 26 None
Trainings Available 29	Trainings Available 30	Trainings Available 31 None	Trainings Available 1 HAPPY HOLIDAYS!	Trainings Available 2 None

UPCOMING FREE TRAINING

<p>Dashboard Apps</p> <p>Wednesday, December 3rd 10PT / 12CT / 1ET</p> <p>Learn all about the brand new DonorSnap Dashboard. Add and customize Apps specifically for your user account.</p> <p style="text-align: center; color: red;">1 SEATS AVAILABLE</p>	<p>Contribution Statements</p> <p>Wednesday, December 10th 10PT / 12CT / 1ET</p> <p>Learn how to print Contribution Statements for end of year reporting or send batch statements via email, right out of DonorSnap.</p> <p style="text-align: center; color: red;">0 SEATS AVAILABLE</p>	<p>DataMiner Platinum with Contribution Statements</p> <p>Wednesday, December 17th 10PT / 12CT / 1ET</p> <p>See DataMiner Platinum in action. Walk through queries to customize your end of year Contribution Statements.</p> <p style="text-align: center; color: red;">3 SEATS AVAILABLE</p>
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[View our training calendar](#)



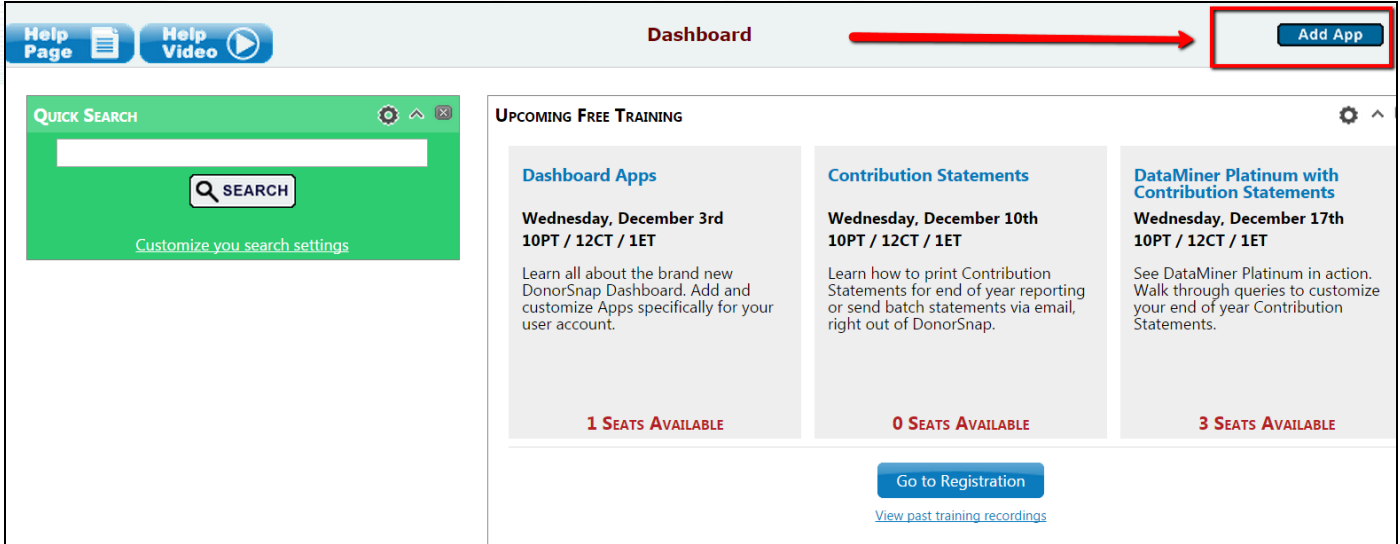
The Dashboard allows you to add and view **Apps**, alerts and goals respective to your individual user account. These “apps” include:

- **Goals:** Set up goals to track performance, such as How is my Capital Campaign going? Or How many new volunteers have signed up since August?
- **Ticklers:** Calendar reminders for your contacts, such as those to follow-up with, Grant reports and application reminders.
- **Favorite Pages:** Create your own menu of DonorSnap features and reports you use most often
- **Quick Search:** Search for a contact from the Dashboard, it will open to the Listing tab of the database for direct editing.
- **Online Forms Open Records:** Alerts you that an online form has been submitted and needs to be processed
- **Acknowledgements Pending:** Alerts you to print/email acknowledgements for donations received
- **OrgContact Emails Pending:** Alerts you to send the email notification to board members (or other solicitors) assigned to recent donations
- **Upcoming Free Training:** Calendar reminders of FREE upcoming trainings
- **Keep & Share Calendar:** Display a calendar on your home page (www.keepandshare.com)
- **Recent Donations:** Display a list of recent donations made
- **Top Donors:** Display a list of Top Donors to your organization

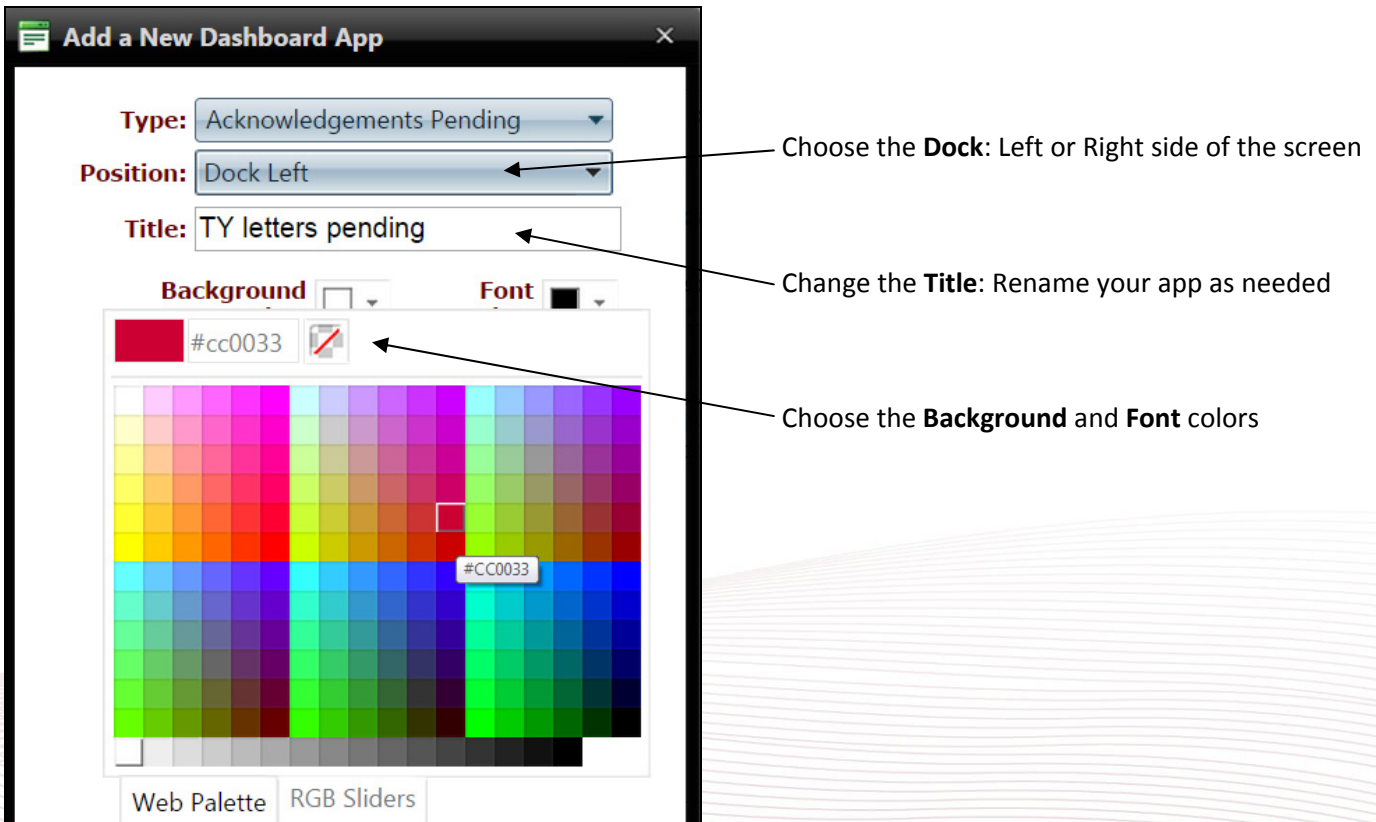
Remember that Dashboard apps are **specific to the user**. Each user at your organization can have their own apps, customize the colors and order of their apps.

Additionally, if you have customized the security of your users, that security extends to the Dashboard (for example, a user who does not have access to Online Forms, will not have the ability to add the Online forms open records app).

Two default apps are already created for you: the QuickSearch, and the Upcoming Training calendar. Start by **Adding an App**, in the top Right of the screen.



Choose an App from the list. Customize the appearance of your App.



Type: Acknowledgements Pending

Position: Dock Left

Title: TY letters pending

Background **Font**

#cc0033

#CC0033

Web Palette RGB Sliders

Choose the **Dock**: Left or Right side of the screen

Change the **Title**: Rename your app as needed

Choose the **Background** and **Font** colors



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QUICK SEARCH

SEARCH

[Customize you search settings](#)

Edit the App appearance **Collapse (takes down to Title only)** **Delete App from the screen**

- By default, the Dashboard will show the **QuickSearch** and **Upcoming Training** apps, until you customize it.
- Delete apps by clicking the X in the top right of each app, if desired.
- Edit apps by clicking the Gear Icon in the top right of the app. Customize the title, color, and Docking of your apps after they have been created.
- **Drag and Drop** apps around the dashboard to change their location on the screen



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Setting Up Goals

Create Apps for DonorSnap Goals:

When you **Add App > Goals**, customize the look & feel of the app here. You must also **Setup Goals**, to create the goal attached to the visible App.

Add a New Dashboard App

Type: Goal
Position: Dock Right
Title:
Goal: select goal...
Goal Bar Background Color: Goal Color:
[Setup Goals](#)
Background Color: Font Color:

Set up goals based on Donations, Interactions or Volunteers (such as how is my Capital Campaign doing or how many volunteer hours have been put in at the Front desk). You can have multiple Goals visible on your Dashboard.

Goal Title	Goal Type	Field Type	Field Value
<input type="text" value="Capital Campaign"/>	<input type="text" value="\$ Amount"/>	<input type="text" value="Campaign"/>	<input type="text" value="Capital Campaign"/>
Goal #:	<input type="text" value="5,000"/>		
Start Date:	<input type="text" value="8/1/2014"/>		
End Date:	<input type="text" value="12/31/2014"/>		
Goal Shared:	<input checked="" type="checkbox"/>		



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Ticklers

DonorSnap's Tickler system allows you to track reminders about your contacts (contacts to follow-up with, grant applications and reports due, meetings and presentations coming up).

Use the Tickler tab within a Contact's record to create the ticklers:

The screenshot shows the 'Edit Tickler' form within a contact's record. The form has a dark header with tabs for 'Address', 'Donations', 'Pledge', 'Interaction', and 'Tickler'. Below the header, there are two buttons: 'Save & Return to List' and 'Cancel'. The form fields are as follows:

- Heading: call about Gala sponsorship
- Date Follow Up: 4/26/2015
- Task: talk to Stephanie
- Person Responsible: Erin Donovan
- Person E-Mail for Follow Up: erin@donorsnap.com
- Send Tickler E-Mail: Once when past due
- Comments: (empty text area)
- Completed:

Add the Tickler App to the Dashboard to view Ticklers when you log in to DonorSnap. Customize the tickler app to include only those assigned to a specific person, or containing specific words. Have multiple tickler groupings on your dashboard! For example, one grouping for Nancy's phone calls, one group for Grant reminders, etc.

The screenshot shows the 'Add a New Dashboard App' form. The form has a dark header with the title 'Add a New Dashboard App' and a close button. The form fields are as follows:

- Type: Tickler
- Position: Dock Right
- Title: Gala Sponsors
- Filter:
 - Follow Up Date: (empty date range)
 - Person Responsible: Erin Donovan
 - Heading: Contains sponsorship
 - Task: Contains (empty)
 - Completed: No
- Background Color: (orange)
- Font Color: (black)
- Buttons: Add App