Building Donation Forms in DonorSnap

Online Forms is a module that comes installed with DonorSnap. You create your own forms.
Forms are built within DonorSnap, and the donation is recorded in the database (same as if you manually added a $50 check as a donation from one of your contacts). The Credit Card is processed through a 3rd party called **Accelerated Payments**, who deposits the money in your bank account.

You must have an account with **Accelerated Payments** BEFORE building Donation-related forms in DonorSnap.

You can build TWO types of Donation forms:
Standard: One-Time payments
Recurring: For recurring payments. This creates a payment schedule that Accelerated Payments will use to charge the credit card depending on the Frequency created on the form

*While you can create One-Time payments through a Recurring form, most organizations will create TWO different forms: One for one-time payments, and a different form for recurring.

Additionally you can have as many forms as you need (you are not charged per form). Many organizations will create many different forms for specific appeals or campaigns; or you could have one general "Donate Now" form, where the visitor to your website can choose that information themselves.

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:

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.

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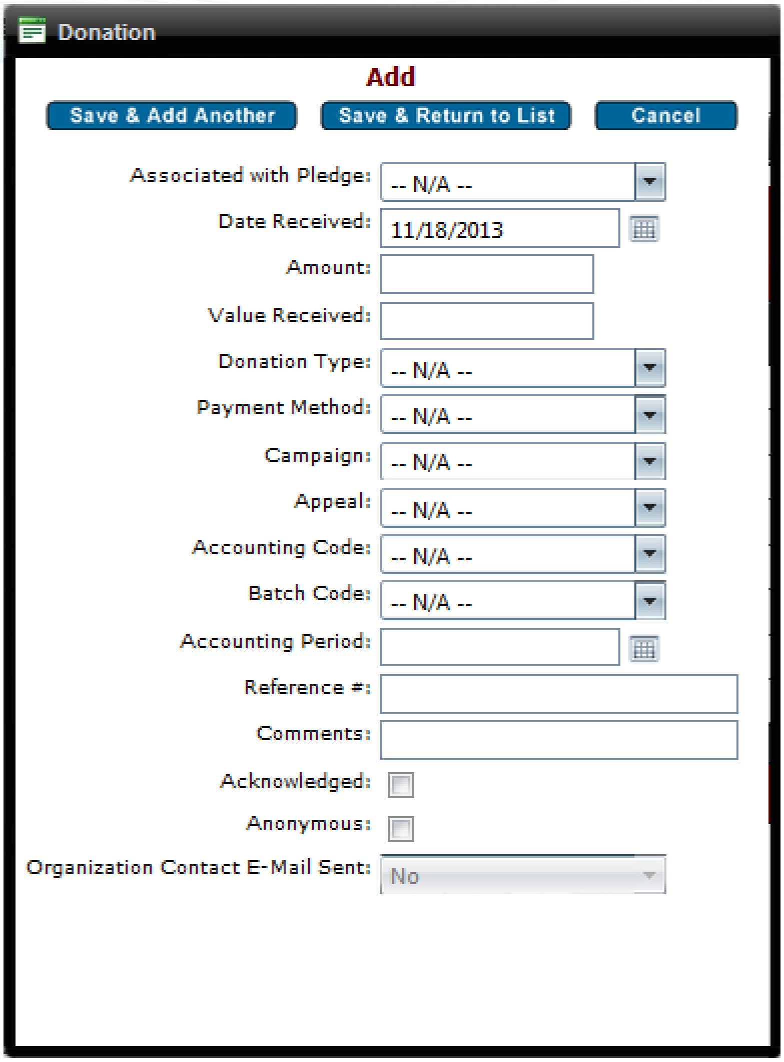
Think…. How would I type in their donation manually? Back up and look at the database structure, to help you plan your form.



Here are the standard fields on the Donation Tab of the database (remember your site can be customized to add/remove fields as needed, so it may not look the same).

When an Online Donation is submitted, THIS is still the tab of the database that is updated. So you want your form to resemble THIS page of information as closely as possible.

Customize the options under these drop-downs (Appeal, Campaign, Batch Code, etc.) under:
Maintenance > Site-Setup > DonorSnap Site Lookups

Build the options in the database first….. then you can build your form based on those fields (for example, what you build in your Appeal code HERE, can be pulled to an Appeal Code on your Online Form).

When building your form, which we'll get to in a minute….. you can also HIDE these fields from your website visitor.
For example, you can program the **DonationType** to indicate "Donation" 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, and Batch Code.

Things to consider with Online Donations:

1 – What Types of Donations are your visitors making? Are ALL these donations simply… "Donations" because they are inspired by your mission? Or are you going to allow "Memorial" or "Honorary" donations at the same time? -- How are you going to capture that on your form?
Most organizations would use the **DonationType** field to indicate "Donation" vs. "Memorial Donation".

You need to populate the options in the DonationType field before building your form.

2 – Are you allowing your visitors to indicate what program or project they're supporting? -- how do you capture programs in DonorSnap now?
Most organizations will use the **Campaign** field for different programs or projects happening; some will use the **AccountingCode** for the FUND that they are donating to.

Either option, you need to populate the drop-down options in these fields before building the form.

3 – How are you going to Thank your donors for their donation?
The Online Form <u>will send an email</u> 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.

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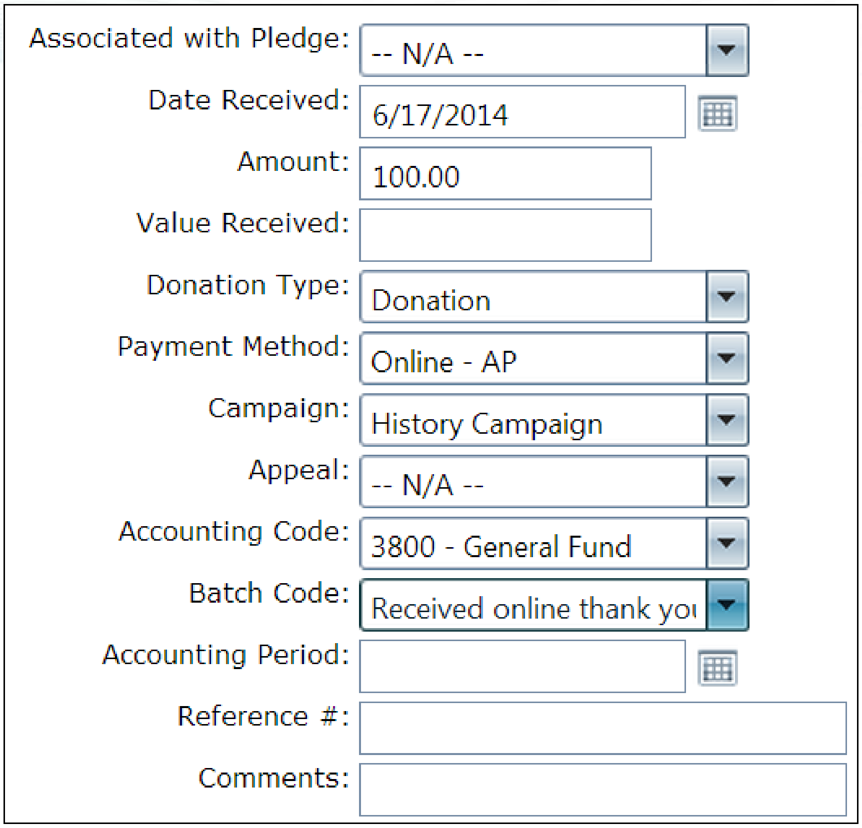
When a donation is received through my Online Form and processed in to DonorSnap, I want it to appear something like this:



All fields for my future reports are filled out, DonationType, PaymentMethod, Campaign, and Accounting Code…

AND the Batch Code for the Thank you letter receipt.

Customize the Black drop-downs under:
Maintenance > Site-Setup > DonorSnap Site Lookups

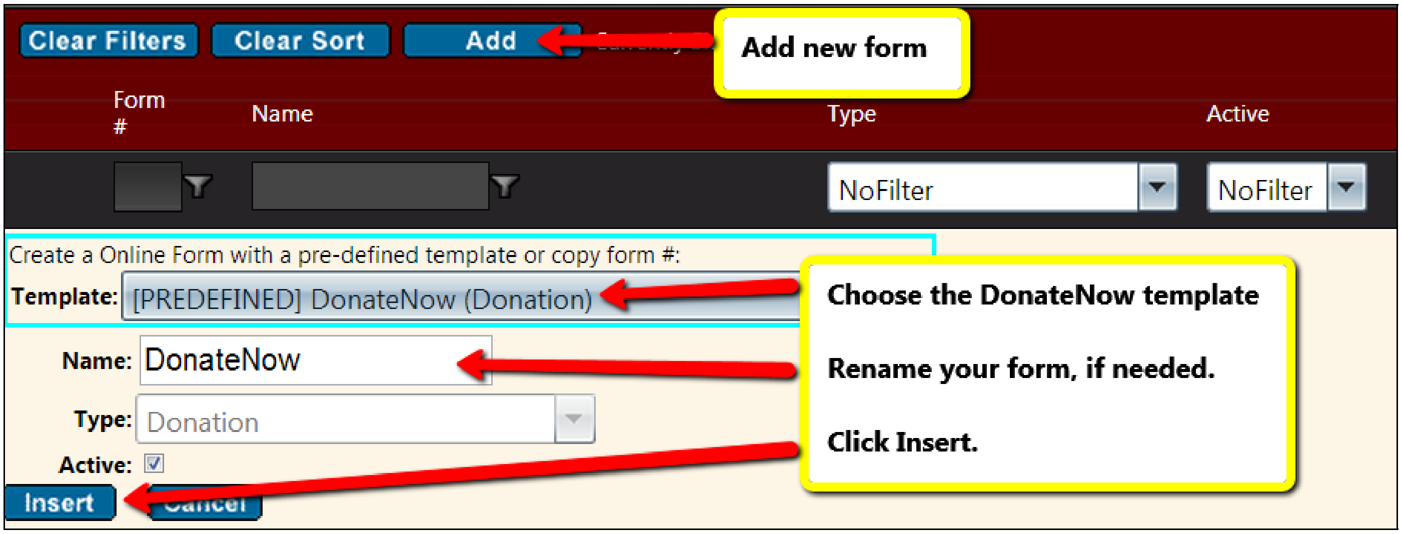
You can also add additional fields to the database that you might need on your form (such as MembershipLevel). These are called “User Defined Fields” and are added under:
Maintenance > Site-Setup > User Defined Setup

Build Your Form

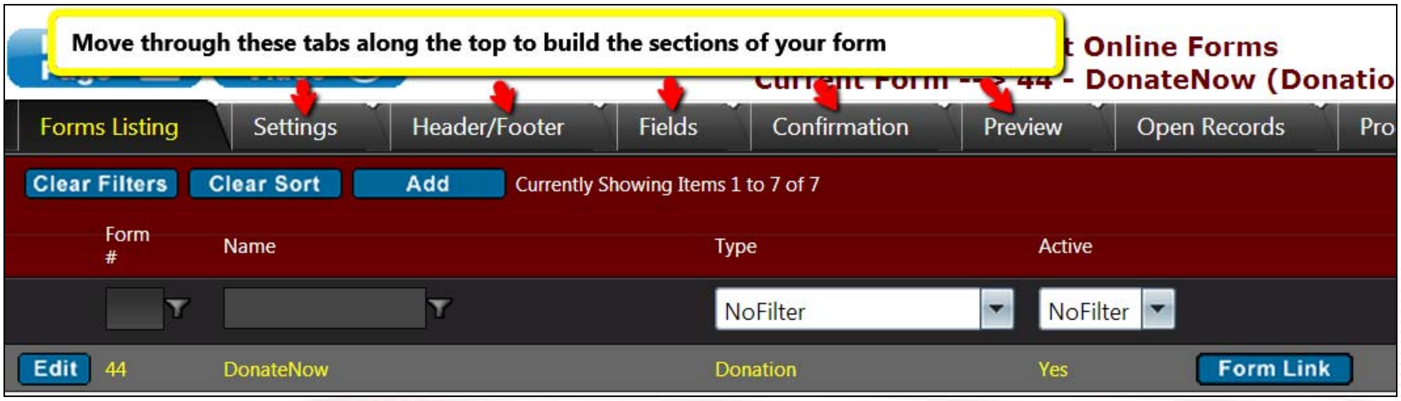
Online Forms > Standard Forms (or Recurring, if you're building a Recurring form)

-- 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



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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.

Most organizations find these unnecessary for Donation forms, especially because you are trying to make the Donation process as easy as possible! But of course this is up to you.

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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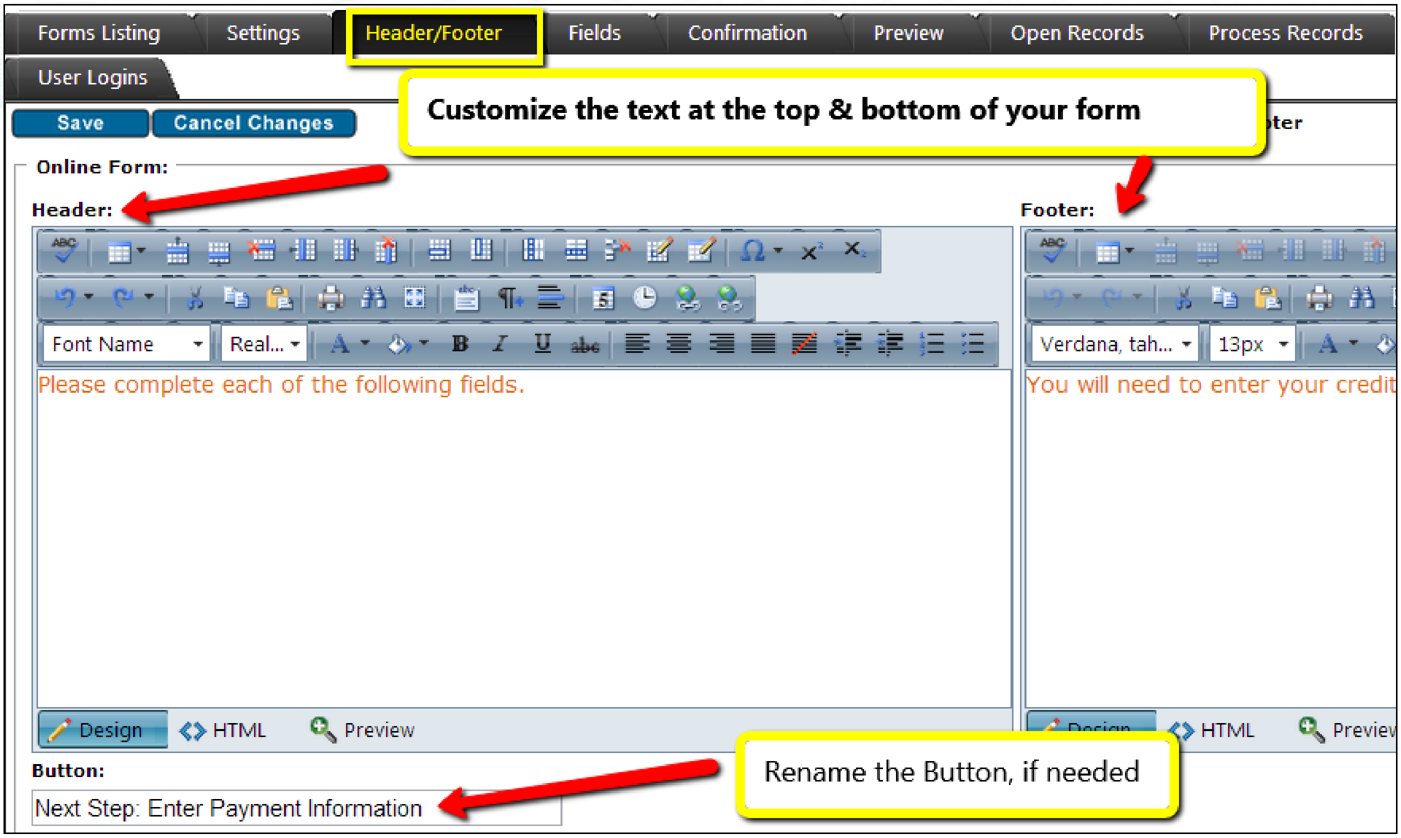
Customize the Header/Footer



If you used the DonateNow template, the footer text will include information that the Next Step is to enter your credit card information. This is helpful to explain to your website visitor that this is only Step 1, and another step is coming.

Rename the text on the Button as needed, such as change to **Donate Now!** ☺

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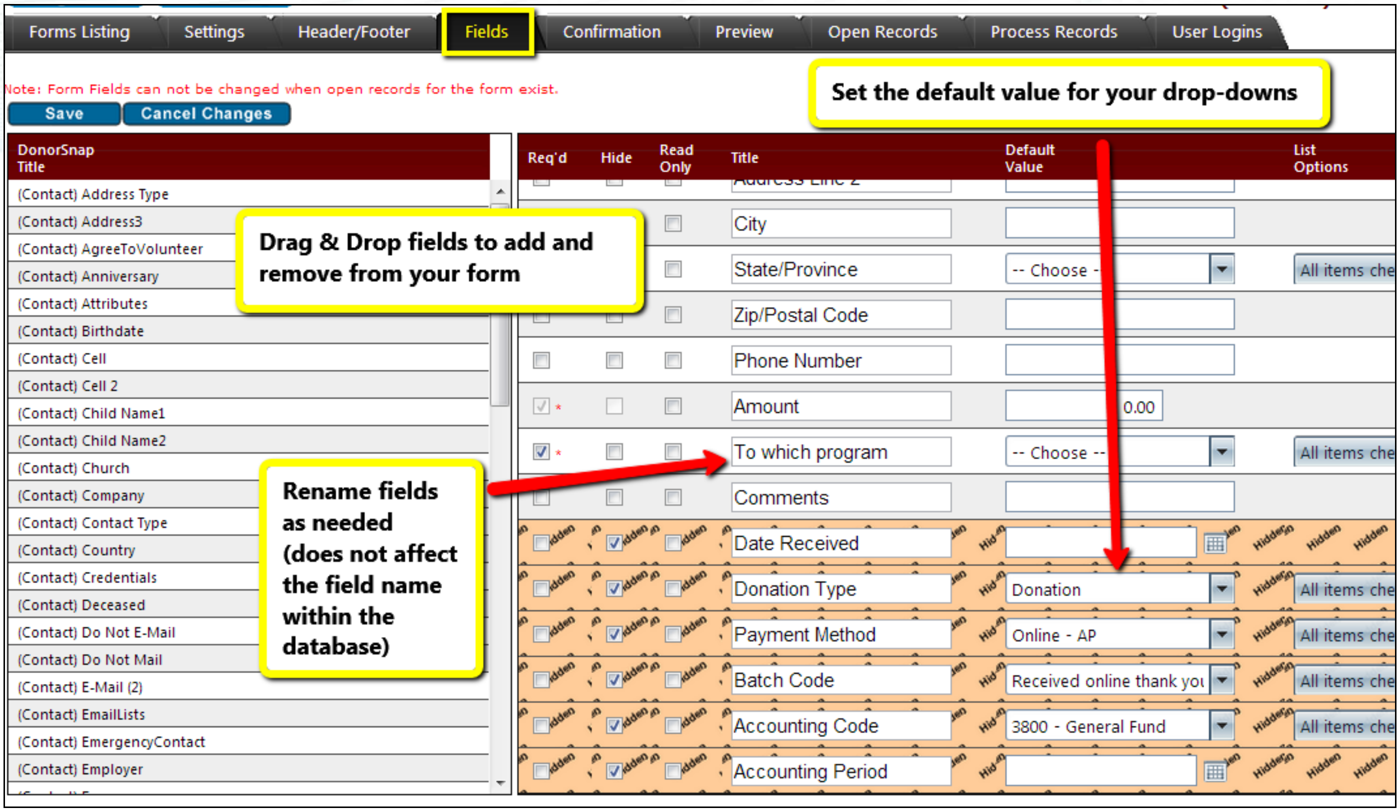
Build the Fields of your Form



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

Rename fields: For example, I added the **Campaign** code to indicate the program they are donating towards, but renamed the field to "To which program". The Field names help make your form appear more warm & fuzzy, "Where would you like the money to go?" instead of "AccountingCode", etc.

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 Donations will be going to the **AccountingCode** of "General Fund".

Date Received: Leave the Date received field BLANK and it will automatically insert **Today's Date** of when the form is submitted.

If you did not use the DonateNow template, make sure to drag over all relevant Donation fields.

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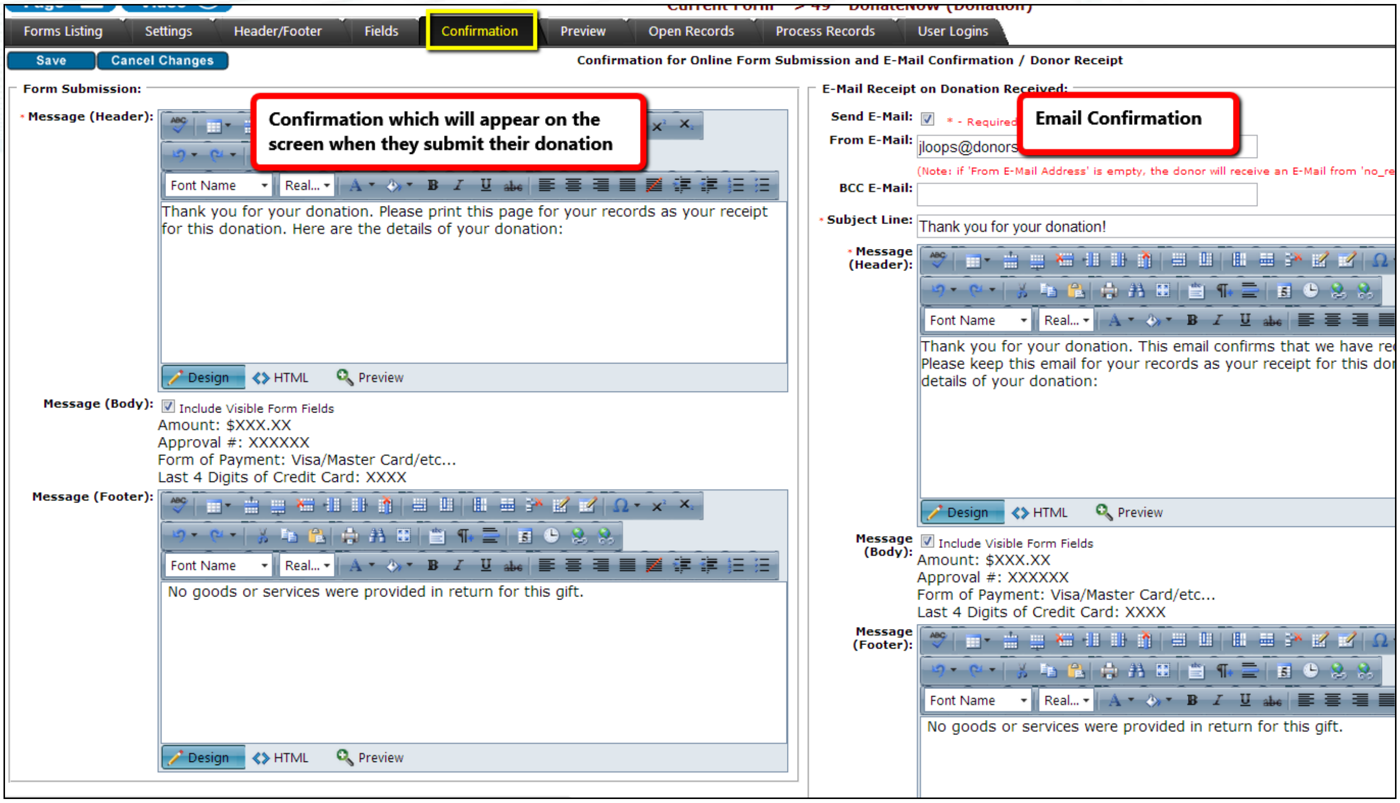
Build your Confirmations



There are TWO confirmations created by the Online Form:

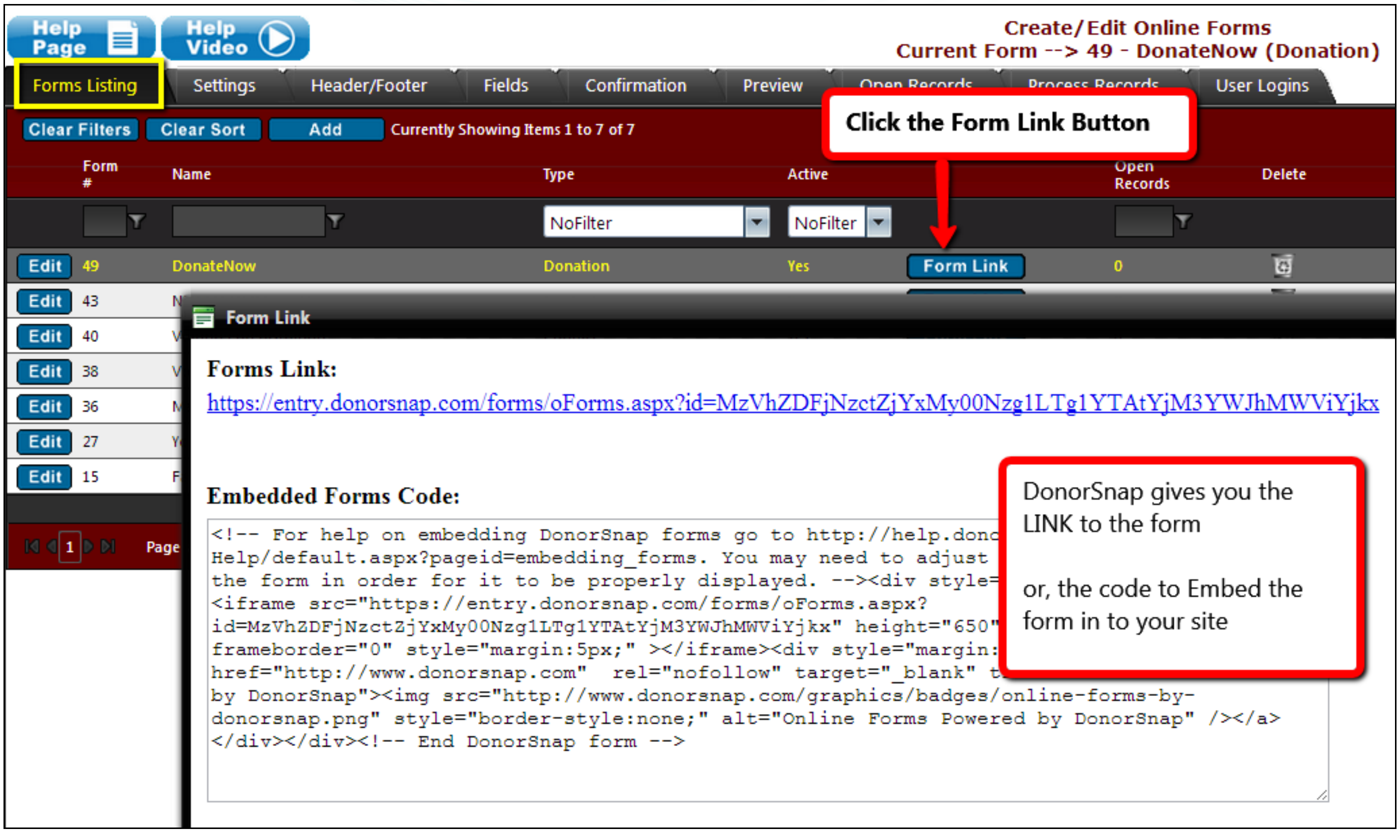
Left: a Confirmation webpage which will appear in their browser when they submit the form. **Thank you for your submission -** type confirmation.

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.

Put the Form on your Website

Once you have built the form to your needs (or at least the needs for today, because <u>you can make updates later</u>), 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 <u>will automatically</u> update the live form on your website.**

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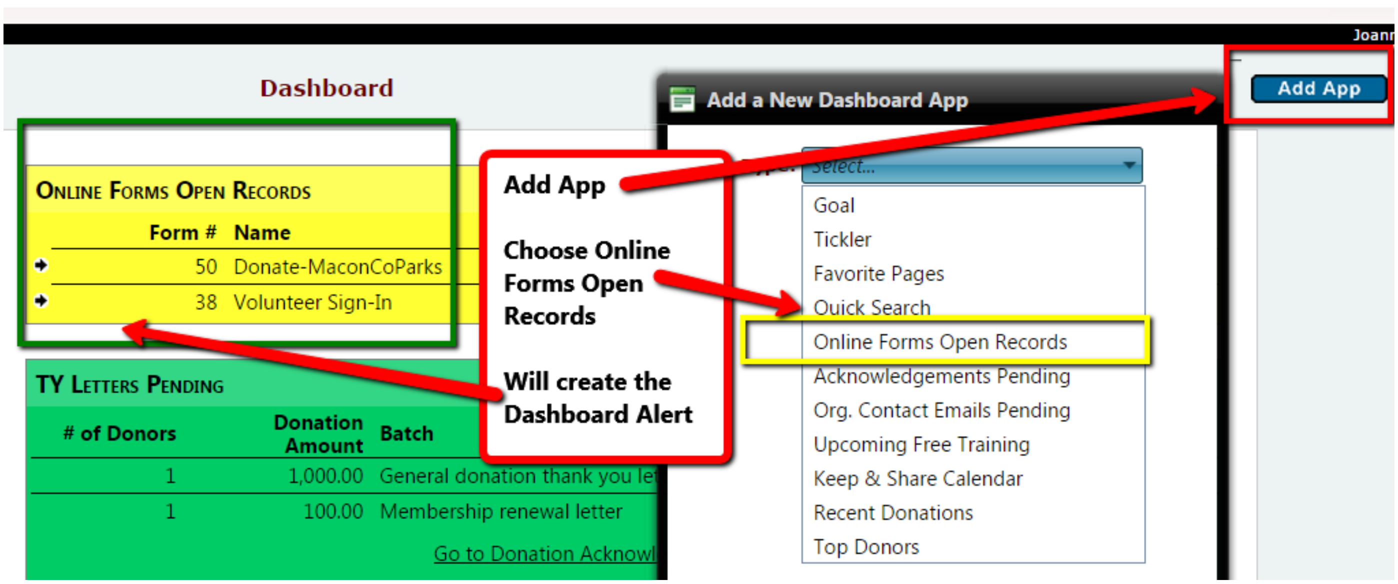
Process Forms

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.

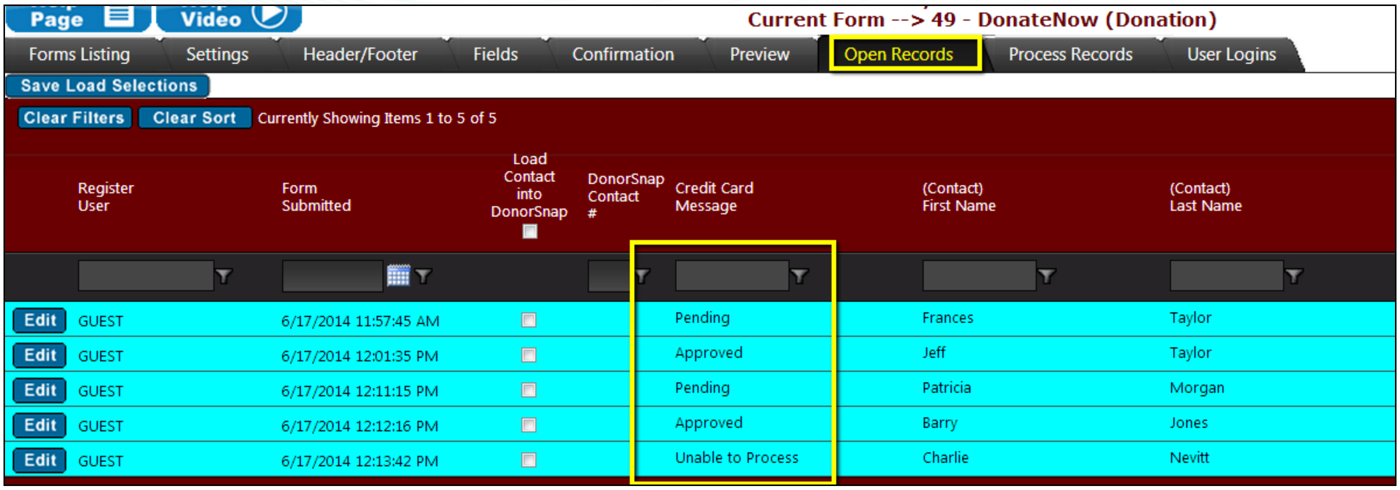


To turn on this alert:

1. One you **Dashboard**, Click the "Add App" button in the top right.
2. Choose "Online Forms Open Records" from the list.
3. Rename the App if you want; choose the Color display of your App. Save it.
4. Online Forms alert will now be your dashboard.
5. Click the Teeny arrow which will take you to the **Open Records** tab of your form, so you can work on processing your records.

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.



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.

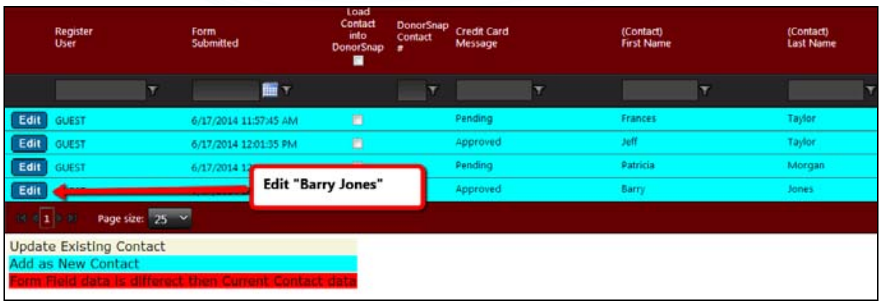
Unable to Process: Means the Contact did not enter a valid credit card. They submitted the first page of the form, but the card was either declined or the page was closed before completing their payment information.

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

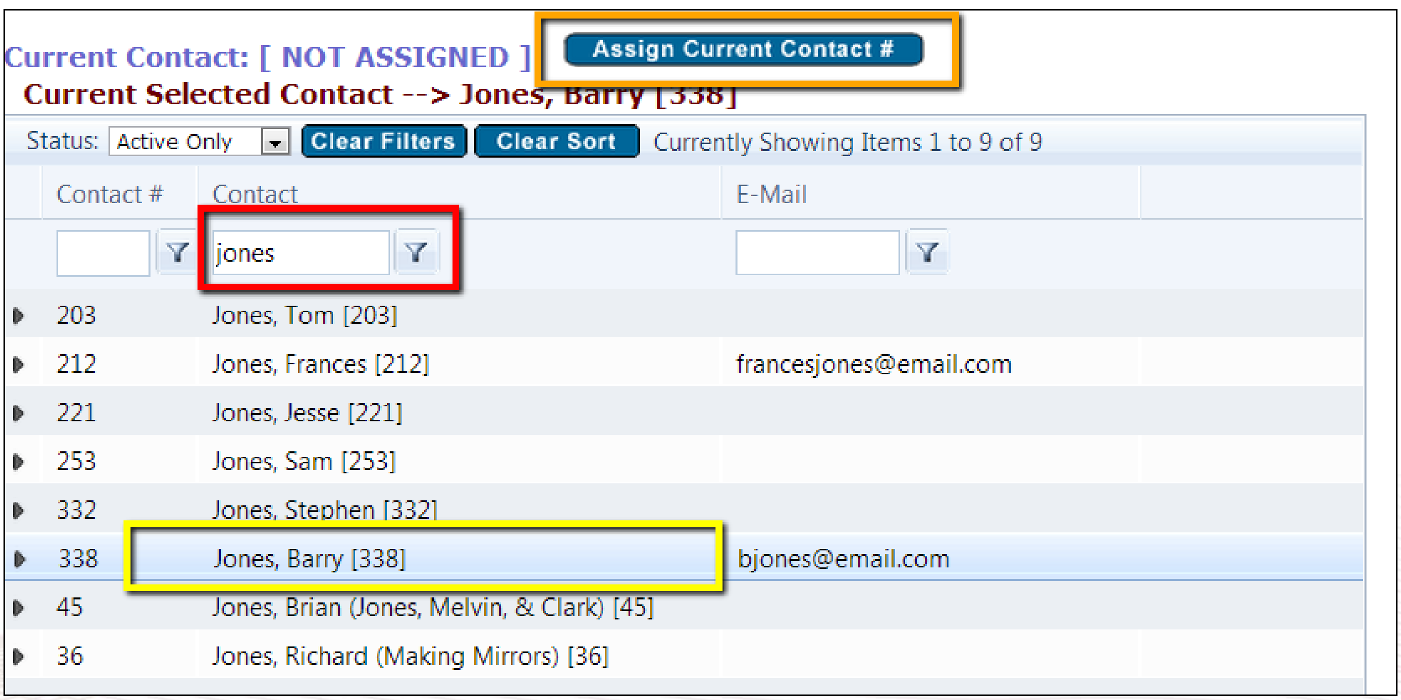
To Delete the "Unable to Process" transactions, click the **Process Records** tab.
Click the **Delete Unable to Process** button.

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).

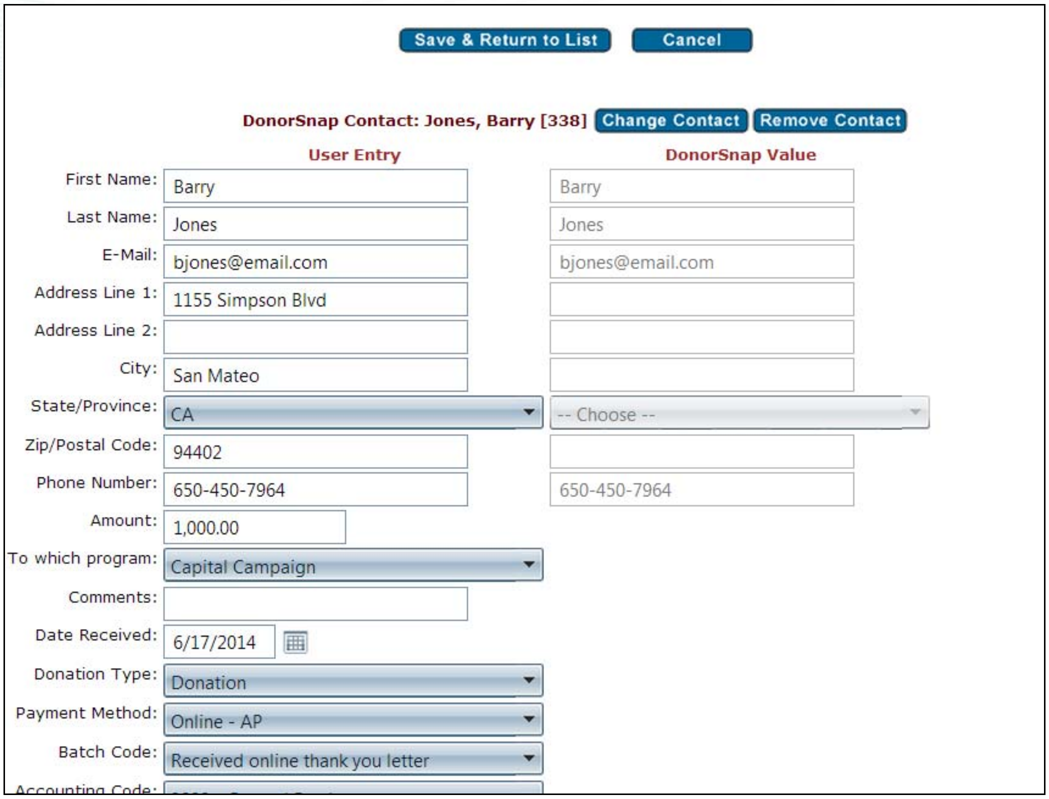


Click the **Change Contact** button. Look up the **Last Name** under Contact, find the contact on the list and click to Select it, click the **Assign Current Contact #** button at the top of the screen.

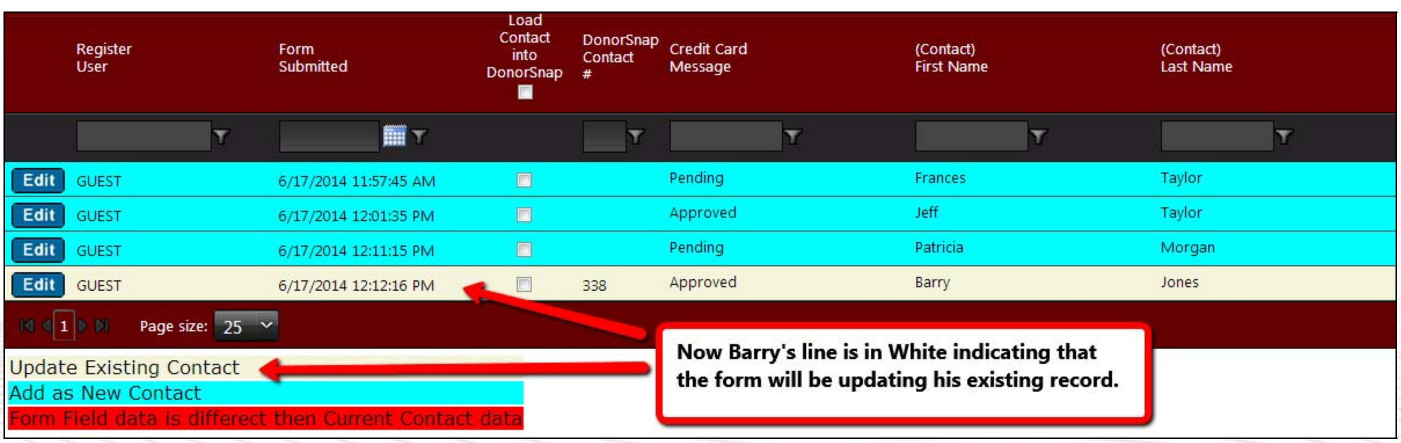


In the event that the contact DOES NOT exist, simply click **Cancel**; the submission will add a NEW contact.

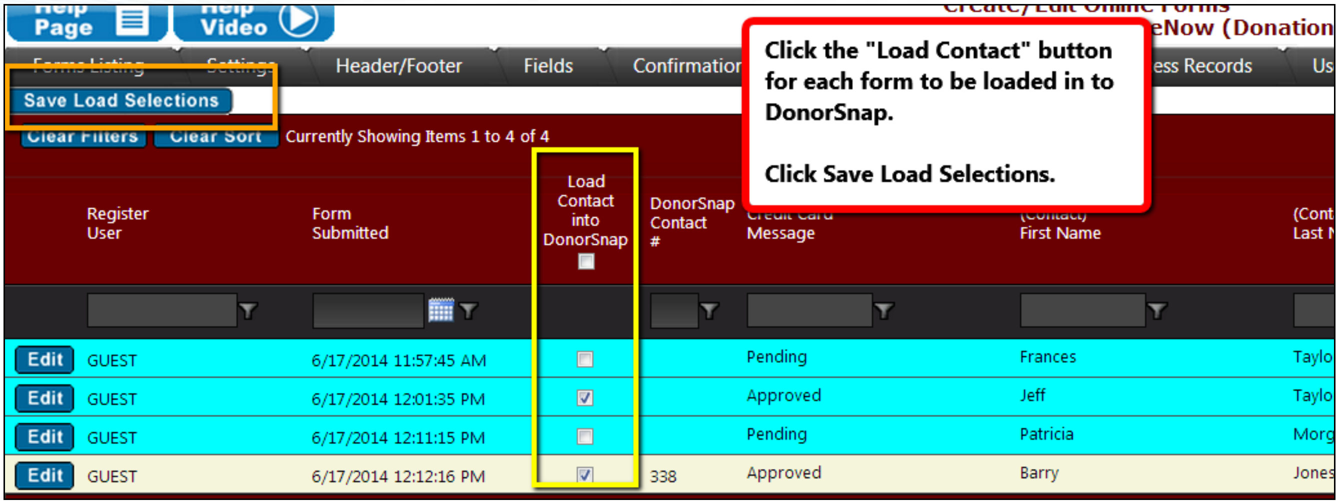
This will bring you to a comparison page between what information was submitted on the form, and what information already exists in DonorSnap.



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.



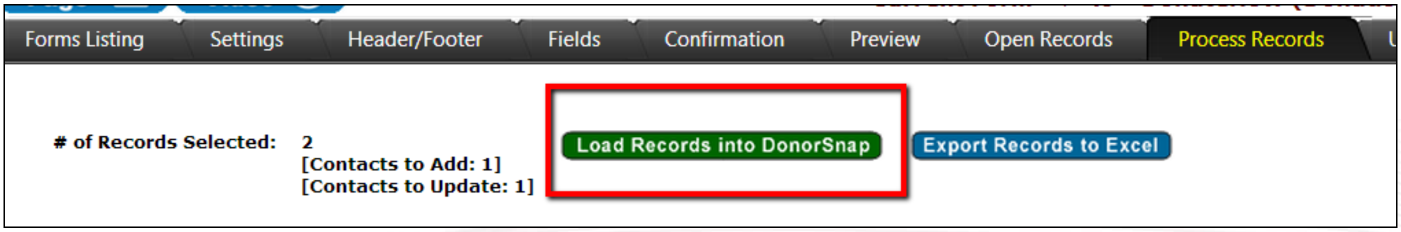
Once you have Edited each of your form submissions to match up with their existing records (or not), click all the forms you are ready to load in to DonorSnap, click the **Save Load Selections** at the top of the screen.



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.

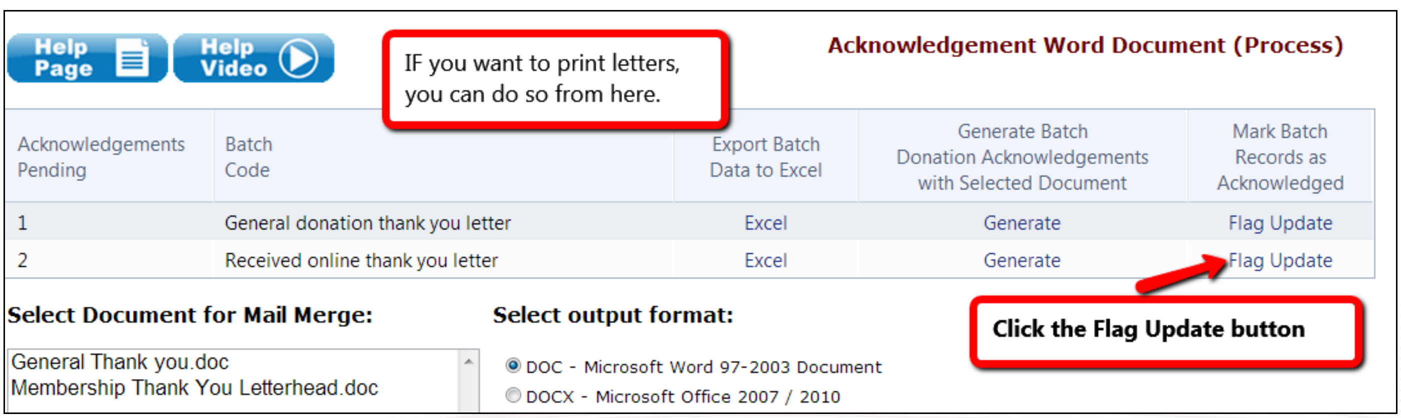
If you are using the Acknowledgement system within DonorSnap, you should now have an alert on your Dashboard that there are "Acknowledgement Documents Waiting"

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.