



## 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 3<sup>rd</sup> 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

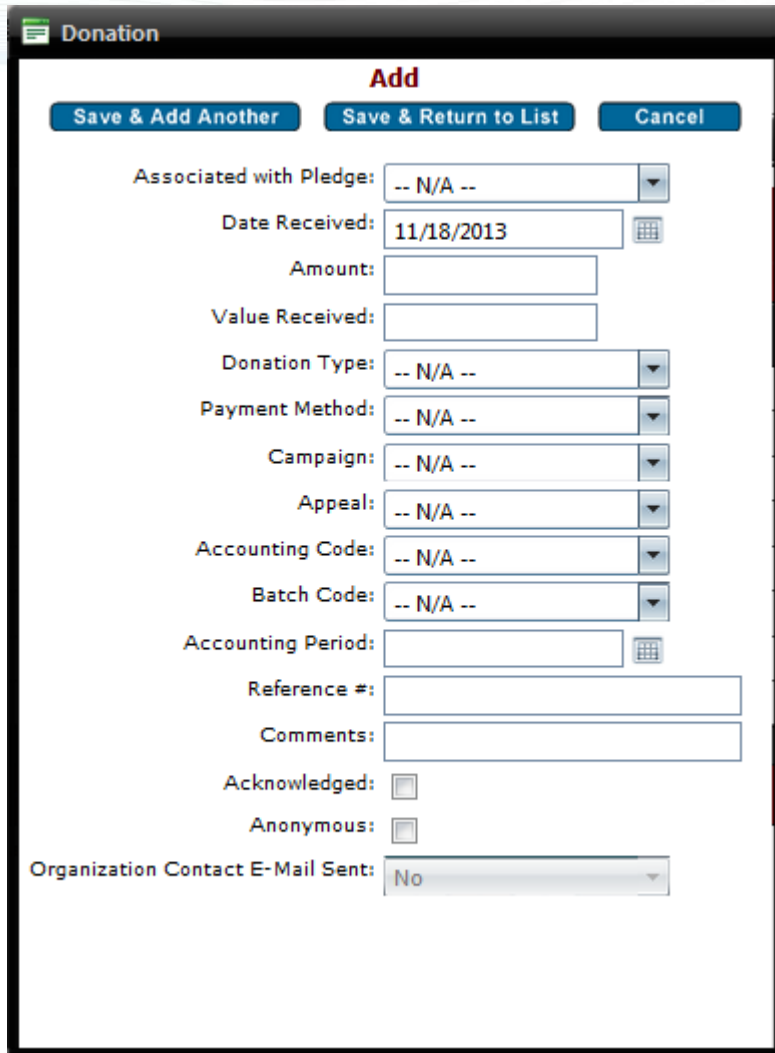
Once you set up your account with Accelerated Payments, you (**or them**) need to enter your account details under **Maintenance > Site-Setup > Payment Processing**. In many cases, Accelerated Payments will log in to your DonorSnap site and do this for you, as well as set up a “fake” form & test it.

### 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.

**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 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.



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

Associated with Pledge:	-- N/A --
Date Received:	6/17/2014
Amount:	100.00
Value Received:	
Donation Type:	Donation
Payment Method:	Online - AP
Campaign:	History Campaign
Appeal:	-- N/A --
Accounting Code:	3800 - General Fund
Batch Code:	Received online thank you
Accounting Period:	
Reference #:	
Comments:	

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

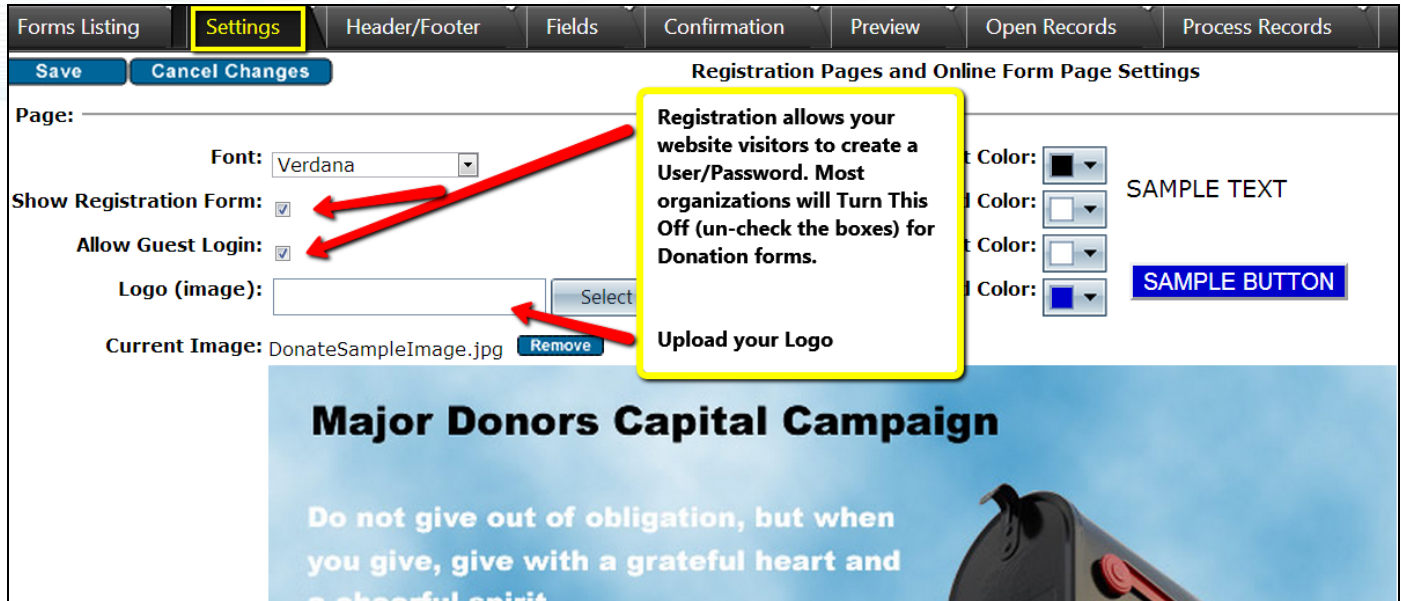
**Online Forms > Standard Forms** (or Recurring, if you're building a Recurring form)

-- 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

## 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 another form, 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 allow 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.



## Customize the Header/Footer

Forms Listing Settings **Header/Footer** Fields Confirmation Preview Open Records Process Records

User Logins

Save Cancel Changes

**Customize the text at the top & bottom of your form**

Online Form:

**Header:**

Font Name Real... A B I U abc

Please complete each of the following fields.

**Footer:**

Verdana, tah... 13px A

You will need to enter your credit

Design HTML Preview

**Button:**

Next Step: Enter Payment Information

**Rename the Button, if needed**

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!** 😊



## Build the Fields of your Form

DonorSnap Title	Req'd	Hide	Read Only	Title	Default Value	List Options
(Contact) Address Type				Address Line 2		
(Contact) Address3				City		
(Contact) AgreeToVolunteer				State/Province	-- Choose --	All items che
(Contact) Anniversary				Zip/Postal Code		
(Contact) Attributes				Phone Number		
(Contact) Birthdate				Amount	0.00	
(Contact) Cell				To which program	-- Choose --	All items che
(Contact) Cell 2				Comments		
(Contact) Child Name1	<input checked="" type="checkbox"/>			Date Received		Hidden Hidden Hidden
(Contact) Child Name2	<input checked="" type="checkbox"/>			Donation Type	Donation	All items che
(Contact) Church	<input checked="" type="checkbox"/>			Payment Method	Online - AP	All items che
(Contact) Company	<input checked="" type="checkbox"/>			Batch Code	Received online thank you	All items che
(Contact) Contact Type	<input checked="" type="checkbox"/>			Accounting Code	3800 - General Fund	All items che
(Contact) Country	<input checked="" type="checkbox"/>			Accounting Period		Hidden Hidden Hidden
(Contact) Credentials						
(Contact) Deceased						
(Contact) Do Not E-Mail						
(Contact) Do Not Mail						
(Contact) E-Mail (2)						
(Contact) EmailLists						
(Contact) EmergencyContact						
(Contact) Employer						

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

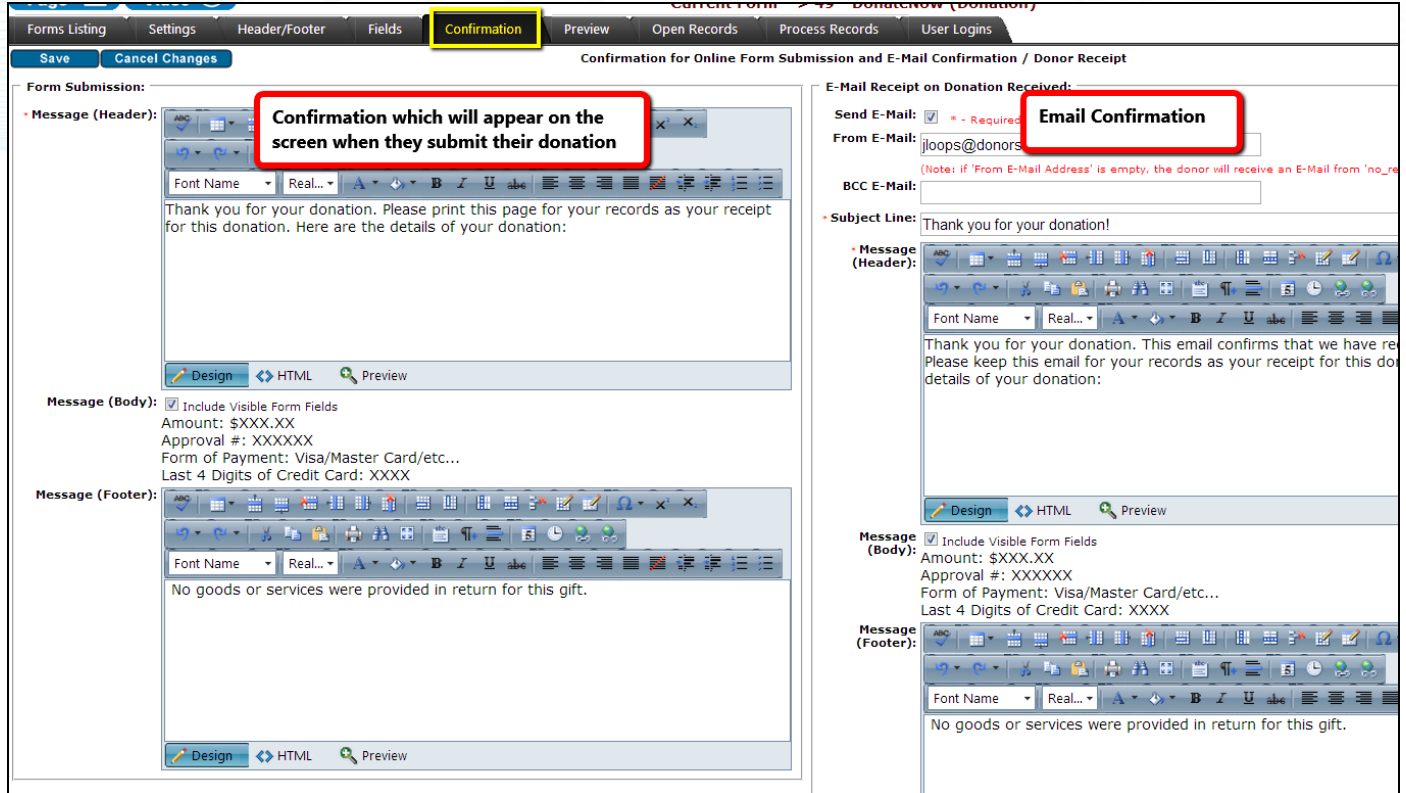
**Rename fields:** For example, I added the **Campaign** code to indicate the program they are donating towards, but renamed the field to “To which program”. The Field names help make your form appear more warm & fuzzy, “Where would you like the money to go?” instead of “AccountingCode”, etc.

**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.

## 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.





## 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.

**Dashboard**

**ONLINE FORMS OPEN RECORDS**

Form #	Name
50	Donate-MaconCoParks
38	Volunteer Sign-In

**TY LETTERS PENDING**

# of Donors	Donation Amount	Batch
1	1,000.00	General donation thank you let
1	100.00	Membership renewal letter

**Add a New Dashboard App**

**Add App**

**Add App**

**Choose Online Forms Open Records**

**Will create the Dashboard Alert**

**Online Forms Open Records**

Goal  
Tickler  
Favorite Pages  
Quick Search  
Online Forms Open Records  
Acknowledgements Pending  
Org. Contact Emails Pending  
Upcoming Free Training  
Keep & Share Calendar  
Recent Donations  
Top Donors

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.

Page		Video		Current Form --> 49 - DonateNow (Donation)						
Forms Listing	Settings	Header/Footer	Fields	Confirmation	Preview	<b>Open Records</b>	Process Records	User Logins		
Save Load Selections										
Clear Filters Clear Sort Currently Showing Items 1 to 5 of 5										
Register User	Form Submitted	Load Contact into DonorSnap	DonorSnap Contact #	Credit Card Message	(Contact) First Name	(Contact) Last Name				
<a href="#">Edit</a>	GUEST	6/17/2014 11:57:45 AM	<input type="checkbox"/>	Pending	Frances	Taylor				
<a href="#">Edit</a>	GUEST	6/17/2014 12:01:35 PM	<input type="checkbox"/>	Approved	Jeff	Taylor				
<a href="#">Edit</a>	GUEST	6/17/2014 12:11:15 PM	<input type="checkbox"/>	Pending	Patricia	Morgan				
<a href="#">Edit</a>	GUEST	6/17/2014 12:12:16 PM	<input type="checkbox"/>	Approved	Barry	Jones				
<a href="#">Edit</a>	GUEST	6/17/2014 12:13:42 PM	<input type="checkbox"/>	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. You cannot delete a Pending transaction. 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 cannot 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.



# DonorSnap

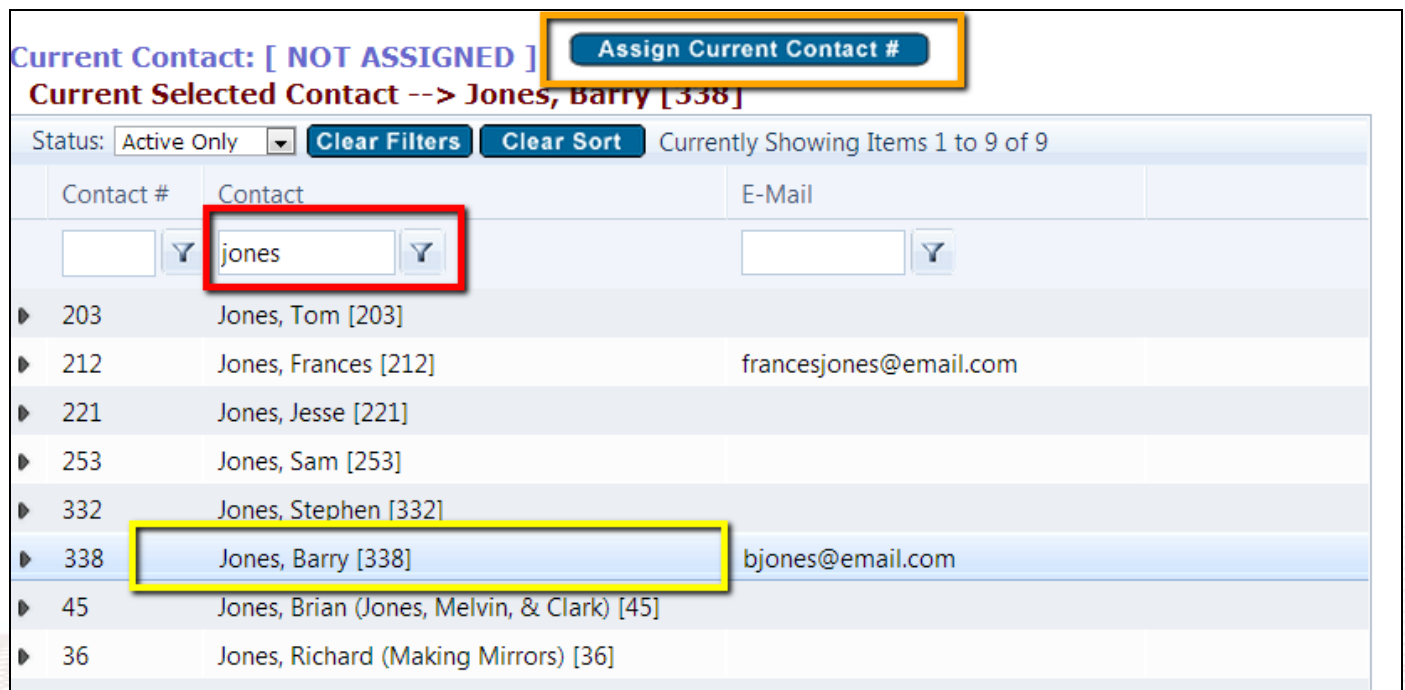
Donor Management Made Easy

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.



# DonorSnap

Donor Management Made Easy

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

[Save & Return to List](#) [Cancel](#)

**DonorSnap Contact: Jones, Barry [338]** [Change Contact](#) [Remove Contact](#)

	User Entry	DonorSnap Value
First Name:	Barry	Barry
Last Name:	Jones	Jones
E-Mail:	bjones@email.com	bjones@email.com
Address Line 1:	1155 Simpson Blvd	
Address Line 2:		
City:	San Mateo	
State/Province:	CA	-- Choose --
Zip/Postal Code:	94402	
Phone Number:	650-450-7964	650-450-7964
Amount:	1,000.00	
To which program:	Capital Campaign	
Comments:		
Date Received:	6/17/2014	
Donation Type:	Donation	
Payment Method:	Online - AP	
Batch Code:	Received online thank you letter	
Accounting Code:		

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.

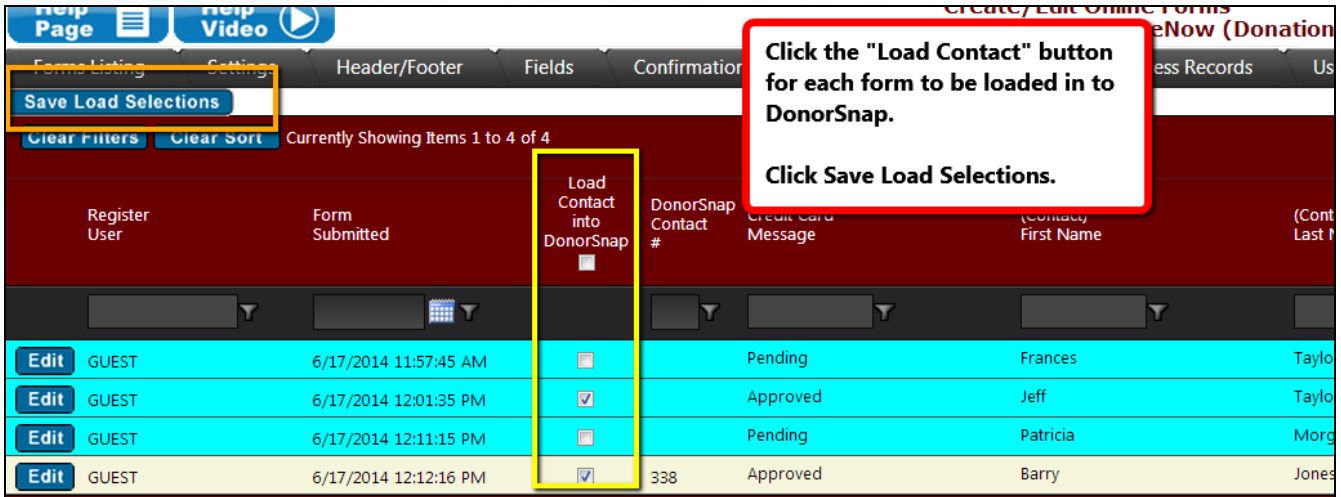
	Register User	Form Submitted	Load Contact into DonorSnap	DonorSnap Contact #	Credit Card Message	(Contact) First Name	(Contact) Last Name
<a href="#">Edit</a>	GUEST	6/17/2014 11:57:45 AM	<input type="checkbox"/>		Pending	Frances	Taylor
<a href="#">Edit</a>	GUEST	6/17/2014 12:01:35 PM	<input type="checkbox"/>		Approved	Jeff	Taylor
<a href="#">Edit</a>	GUEST	6/17/2014 12:11:15 PM	<input type="checkbox"/>		Pending	Patricia	Morgan
<a href="#">Edit</a>	GUEST	6/17/2014 12:12:16 PM	<input type="checkbox"/>	338	Approved	Barry	Jones

Page size: 25

Update Existing Contact  
Add as New Contact  
Form Field data is different then Current Contact data

**Now Barry's line is in White indicating that the form will be updating 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.



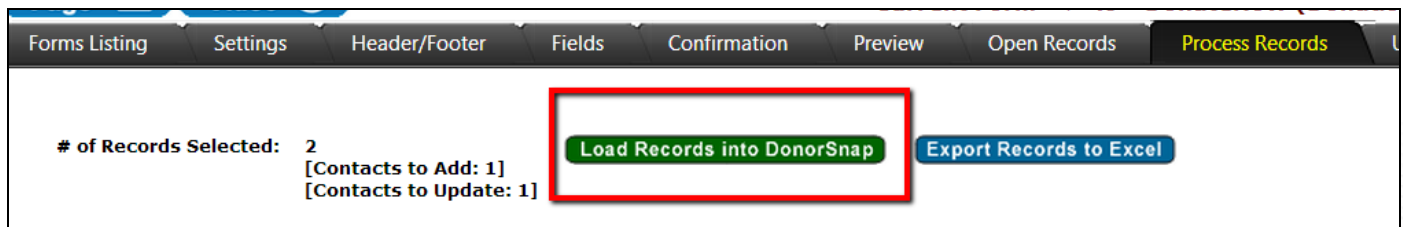
Click the "Load Contact" button for each form to be loaded in to DonorSnap.  
Click Save Load Selections.

Register User	Form Submitted	Load Contact into DonorSnap	DonorSnap Contact #	Creation Message	(Contact) First Name	(Contact) Last Name
<a href="#">Edit</a> GUEST	6/17/2014 11:57:45 AM	<input type="checkbox"/>		Pending	Frances	Taylor
<a href="#">Edit</a> GUEST	6/17/2014 12:01:35 PM	<input checked="" type="checkbox"/>		Approved	Jeff	Taylor
<a href="#">Edit</a> GUEST	6/17/2014 12:11:15 PM	<input type="checkbox"/>		Pending	Patricia	Morgan
<a href="#">Edit</a> GUEST	6/17/2014 12:12:16 PM	<input checked="" type="checkbox"/>	338	Approved	Barry	Jones

## Process Records

Click the **Process Records** tab.

Click the **Load Records** button.



# of Records Selected: 2  
[Contacts to Add: 1]  
[Contacts to Update: 1]

[Load Records into DonorSnap](#) [Export Records to Excel](#)

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.

## 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.

[Help Page](#)
[Help Video](#)

IF you want to print letters, you can do so from here.

Acknowledgement Word Document (Process)

Acknowledgements Pending	Batch Code	Export Batch Data to Excel	Generate Batch Donation Acknowledgements with Selected Document	Mark Batch Records as Acknowledged
1	General donation thank you letter	Excel	Generate	Flag Update
2	Received online thank you letter	Excel	Generate	Flag Update

**Select Document for Mail Merge:**

General Thank you.doc  
 Membership Thank You Letterhead.doc

**Select output format:**

DOC - Microsoft Word 97-2003 Document  
 DOCX - Microsoft Office 2007 / 2010

Click the Flag Update button

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

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

Donation Forms