New User Success Guide, FAQs, and Training Checklist

When you are ready to start using DonorView, whether that is before or after your data has been converted, we suggest the following steps to set yourself up for success. These 10 steps can be performed out of order and concurrently if desired.

☐ **Step 1 – Understand the software structure and terminology**

DonorView is arranged in modules, grids, and pages. It also may use different terminology than you have used in the past. It is important to review the Module Guides and Glossary of Terms to get more familiar with the functions of the software and the terminology used. This will help as you prepare your data for conversion.

☐ **Step 2 – Engage your team in the process**

Engaging your team in the process will ease everyone's transition so we recommend including the team members who will be using the database in the implementation process. We recommend identifying one person as the primary contact who will act as the database manager. This person will be responsible for coordinating all the customization requests from the team, setting up your users and procedures, and being the main point of contact for scheduling with the DonorView team. All new users should watch the Welcome Video for a good overview of the entire software.

☐ **Step 3 – Define your workflows**

A workflow is a list of steps that typically do to accomplish a task, like entering a new membership or sending renewal reminders. List your workflows and identify those daily, weekly, monthly, quarterly and annual tasks that need to be completed using the software. This helps you to prioritize what needs to be learned first and helps with your conversations with your implementation manager so that your memberships, events, and other activities are set up according to your needs.

☐ **Step 4 – Complete your questionnaires**

Your implementation manager will provide you forms to complete for things like connecting your bank account and setting up users who will have access to the database. You can also establish the security settings for each user. You will also receive fill-in questionnaires for your membership and event pages. Please review and complete these promptly. The membership and event questionnaires help the implementation team efficiently set up your pages and allow you to specify things like wording, ticket prices, attendee questions, membership levels, expiration dates, and branding on your pages. Membership pages are required to import membership data, so this information is especially critical in the data conversion process.

☐ **Step 5 – Prepare your data for conversion**

You will want to review this article Tips for Data Conversion to help you prepare your data for conversion. We also have articles Constituent Grid Data Fields and Gifts Grid Data Fields which explain what each field means and what type of data is contained in that field. If you need custom fields for special data that is not standard, let your implementation manager know and those fields can be added to your profile records. Be sure to spend time cleaning your data by merging duplicates and removing any records that you do not wish to have imported into the new database. Examples of data you may not wish to import include old data, data from deceased constituents, or data without contact information like a name and address or email.

☐ **Step 6 – Review your converted data and pages**

Once your implementation manager completes mapping your data and creating your pages it will be sent back to you for review and approval. Spend time reviewing your data and pages ensuring all the data is in its proper place and it is what you expected to see – be sure to contact your implementation manager with any issues so they can be corrected as needed. Ask another team member to review with fresh eyes to ensure everything is ready to be imported. Once the data is approved and imported you will have the opportunity for a data reviews session with your implementation manager so that you can see exactly how it looks in the software and where to access different information.

☐ **Step 7 – Complete verification of DNS**

When sending emails from DonorView, you must use emails associated with your organization's domain name, like "membership@myassociation.com." You will need to update your domain's Domain Name System (DNS) settings so that recipient email servers know it is your organization. This article explains how. DonorView will then be "authorized" to send emails on behalf of your organization. Public email address like Gmail, Hotmail, Yahoo, and Outlook cannot be verified. Sending emails from these addresses will result in poor email deliverability. You will receive instructions via email from the support team on performing this update and the team is available to assist as needed.

☐ **Step 8 – Prioritize training**

Training can start anytime; You do not have to wait until your data is converted. It's best to start training as soon as you are ready to start using the software. You have several options to learn how to use the software and we will be sending a video soon about all these options. All users have access to the Support Videos and Articles Libraries. You can find the link under your user initials in the top right corner when you log into the software. It is especially important to set aside time for training. Like any complex tool or activity, it takes time to learn all the features and become proficient. Think of it like learning to drive a car, you learned the rules of the road and how to operate the vehicle, but it took time to become a good driver.

☐ **Step 9 – Configure and customize thoughtfully**

Throughout the software there are many user-defined fields and dropdown lists. You can customize these to help with tracking information, segmenting your lists, and reporting. However, it is important to use these fields consistently. For example, the For-Fund-Event-Appeal fields on a transaction are used to categorize revenue sources and link to QuickBooks. Ensuring all entries are assigned to the correct options and adding new options with forethought will prevent issues down the road. This is where it helps to have a designated database manager to coordinate the updates for these fields so that you can use them consistently to have the best results.

☐ **Step 10 – Create simple SOPs**

SOPS are standard operating procedures. DonorView is used by thousands of organizations, and each one does things just a bit differently. We provide guidance on the proper ways to set up a form and what the purpose of each field is to get the desired results, but you will want to ensure you document the steps you expect your users to take when performing routine tasks. This can be a simple as a checklist indicating, for example, whenever a new company record is entered, you expect your team to also provide a company description, company contact, select the industry, and include the company's website. You can even request that certain fields be made "required" so that needed steps are not skipped. Taking the time to create a few simple SOPs will help current and future team members enter data as you intended and will ensure your reports correctly reflect the information you need.

Frequently Asked Questions

Briefly, how does DonorView work?

DonorView is a cloud-based Constituent Relationship Management (CRM) software, also known as a database platform. You must use an internet browser, like Google Chrome, to access the software. It is used to maintain a database of all your constituents in one place, whether they are donors, volunteers, event attendees, granting agencies, email newsletter subscribers, or other contacts. The platform is organized into modules, and each module lets you perform specific tasks, like building donation pages or registering guests for an event. Everything that you send from the database and any transactions that come into the database, like donations, are saved in each constituent's record. This allows you to see a complete history of their giving, attendance, volunteer time, survey responses, communications, memberships, and even things like whether they opened an email or not. You can see the details for one constituent or see grids to view all responses and transactions for donations, events, surveys, memberships, or other data.

What is the difference between a constituent and a donor or a member?

A constituent is any entity that you want to communicate with or record transactions for. A constituent can be a person, a family, or an organization. Members are constituents that have purchased or been gifted a membership transaction. Donors are individuals or organizations that have made a contribution to your organization. All members and donors are constituents, but not all constituents are members or donors.

What is the difference between a dashboard and a grid?

DonorView uses the term "grid" to describe the way the data is displayed – it looks similar to a spreadsheet. A Dashboard is a built-in graphical display for each module that shows charts depicting things like the number of transactions added this week, month, and year, or percentage of emails marked as "unsubscribe." Click the links to learn more about grids and dashboards.

Who can see the data in my database?

You will establish who is a DonorView user and what user rights they have. User rights allow you to restrict which modules they can view and have editing capabilities. The software allows you to create unlimited users. Click the links to learn more about managing users and user rights.

How can I communicate with my constituents using DonorView?

DonorView allows you to send direct emails, email marketing newsletters, text messages, and letters from the software using the Actions menu from most grids. You can learn more about all the features of the Actions menu here.

Why do I need to verify my domain name with DonorView?

Your organization should have a website domain name and have email addresses that utilize that domain name, like donations@helpingthekidsnow.org. The verification process will give DonorView permission to send emails through our servers using your domain name. This will help with deliverability of your emails and reduce the chances it will go into a spam or junk mail folder. It is not possible to verify a personal email address like those from Gmail, Yahoo, Outlook, or Hotmail. Sending emails in the software using a non-verified domain name will increase the likelihood of it being identified as spam.

Why do I need to have an email address with my organization's domain name?

Generic emails like those from gmail.com, @yahoo.com, or @outlook.com cannot be verified. Only email addresses, like "yourname@yournonprofit.org" can be verified and identified as a legitimate sender, not a bot or spammer. This will improve the deliverability of your emails and reduce the chances the emails you send from the platform end up in their spam or junk folder.

Why do you use the word "pages" for forms created with DonorView?

Each donation form, membership sign-up form, auction bid site, or event registration page has a unique URL generated by the software that is a stand-alone webpage, or "page." If you want someone to be able to buy tickets to your event, it is necessary to have an online form that identifies the time, location, ticket levels, etc. as well as collect information about the person or organization that is making the purchase. That transaction is processed by DonorView and the information about the purchaser and all their guests is automatically added to the database. You can then use that information to communicate with your attendees, check them in for the event, and track their participation.

How do I start collecting donations with DonorView?

First, you will set up a sub-merchant account to be able to accept credit cards on your pages. Once you have set this up, you or your implementation manager can create a Donation Page to share on your website or via social media. A Donation Page is built using a step-by-step wizard in the Fundraising module. You can create unlimited pages, and each page has a unique URL, QR code, and html code that can be embedded into your existing website. You can learn more about creating donation pages in this video.

Can I customize the way my pages look?

There are some options to change the fonts and color theme on Event, Membership, Auction and Survey Pages. However, at this time, the layout of these pages is built-in and cannot be changed. The Donation Pages do offer a simple page builder where the software builds the page for you, but you also have an option for an advanced page designer which allows you to organize the page any way you desire.

How will I know if someone makes a donation on one of my Donation Pages?

You can set up notifications to alert you when a donation is made, and you can see every transaction that has been recorded in the Fundraising Gifts grid.

How will I be able to produce financial reports?

You will be able to create a variety of "views" on the Fundraising Gifts grid to show specific types of transactions, date ranges, and apply other filters as desired. You can learn more about fundraising reports in this article.

How can I see what credit card deposits went into my bank account?

If you have the appropriate user rights, you can see a weekly statement for all deposits in the Billing area. Most credit card deposits are made within 24 to 48 hours of the transaction, but for holidays adjacent to weekends, it could take longer due to banking schedules. Deposits will be posted from "Connected View," which is DonorView's parent company.

How will I know if a credit card charge failed?

Anyone who is listed as a notification recipient for a page will receive a notice of a failed credit card transaction. You can also see the information in the Pending status on the transaction record.

Can I enter donations of checks, cash, and in-kind items?

Absolutely. There are a number of options for manually entering donations, pledges, pledge payments, and in-kind contributions. The contribution can be entered from the constituent's record, or you can enter multiple donations from the Gifts grid.

Can people make a donation as a tribute or in honor of someone?

Yes, you can include these fields as well as other optional information to collect on your donation pages and the information can be manually recorded as well.

How does DonorView manage events?

Like Donation Pages, an event begins by creating an Event Page. The Event Page allows you to establish the types of ticket levels that are available, the prices, and lets you collect information about the purchaser and their guests. There are many types of events that can be created with the software, and each event has its own unique URL, QR code, and embed code to allow you to share your event registration page on your website, via social media, and in links in emails. Everyone who purchases tickets for your event is tracked in the Events grid. You can also see details about the event attendees on the Event Attendance grid. DonorView even lets you create table seating maps, has an event calendar, and can send auto-reminders to your guests. This guide helps you manage an event in the software.

Can I update event guest information after they register?

You can update guest information anytime using the Event Attendance grid. If you have the Advanced Donor Portal, guests can also update their own guest information.

Can I sell sponsorships for events?

Yes, sponsorships can include multiple attendees, like a table of 8 for a gala or a foursome for a golf tournament. You can also track the deliverable for sponsorships via the Fundraising module in the Sponsorships grid.

How can I sell things like t-shirts, programs ads, or raffle tickets?

You can either include these as add-ons to your ticket sales event, or you can create separate event pages to sell items.

Can I manage an auction using the software?

The software has an auctions module to allow you to host silent, live, and online auctions. If this is an in-person auction event, you can also record paddle raise (fund-a-need, call-to-heart) donations and sell add-on items like raffle, game, and pull tickets. The text marketing feature must be activated to use the online auction feature. We have an entire FAQ document and guidelines for hosting auction events.

How are memberships different than donations?

A membership is a specific kind of transaction and usually involves some kind of benefits associated with the purchase. For example, a museum may offer free admission, discounts in the gift shop, a digital magazine, and early notification of events to members. Donations are typically contributed without receiving anything in return for the gift.

How do I start collecting membership dues?

If your organization has a membership program, building a membership program all starts with the Membership Page. The step-by-step wizard will allow you to establish your membership types, levels, expiration date, and pricing.

Can I sell family or group memberships?

Yes, the software allows you to set up a variety of types of memberships, including setting up family memberships and a la carte options to pay for additional family members.

How do I send membership renewals with DonorView?

DonorView allows you to send auto-renewal reminders to your members. You can also create renewal letters using the Mail Merge GM Templates feature and send them using the Actions menu on the Memberships grid. The software also has an option to offer your members the opportunity to sign up for auto-renewals on the membership page.

What if someone wants to pay for their membership with cash or a check?

You can record payments internally for memberships that are made with a payment method other than credit card. You can also offer your members an option to select "Pay Later" on the Membership Page, so that they can mail you a check for their payment. From the member's profile, you can record the payment when it is received.

Why are duplicate records created when someone signs up for an event or creates a portal account?

The software looks for existing matches by email address as well as the exact same name. This means the constituent must use the same primary email address you have on file for them, and they must spell their first and last name the exact same way. For donation, membership and event pages, you can turn off the matches for first and last name, but the software will always use email address as the primary match. You can learn more about managing duplicates in this article.

What is the Constituent Portal used for?

The Constituent Portal has two options, a Basic option and an Advanced option. The Basic option allows you to host Peer-to-Peer Campaigns and Auctions using the portal and allows your constituents to create an account and update their personal information. With the Advanced option, you can allow your constituents to see their donation history, update their pledges, add volunteer time, renew their memberships, and update their guest information for events. There is an additional subscription fee for the Advanced option, and it is based on the number of constituent portal accounts.

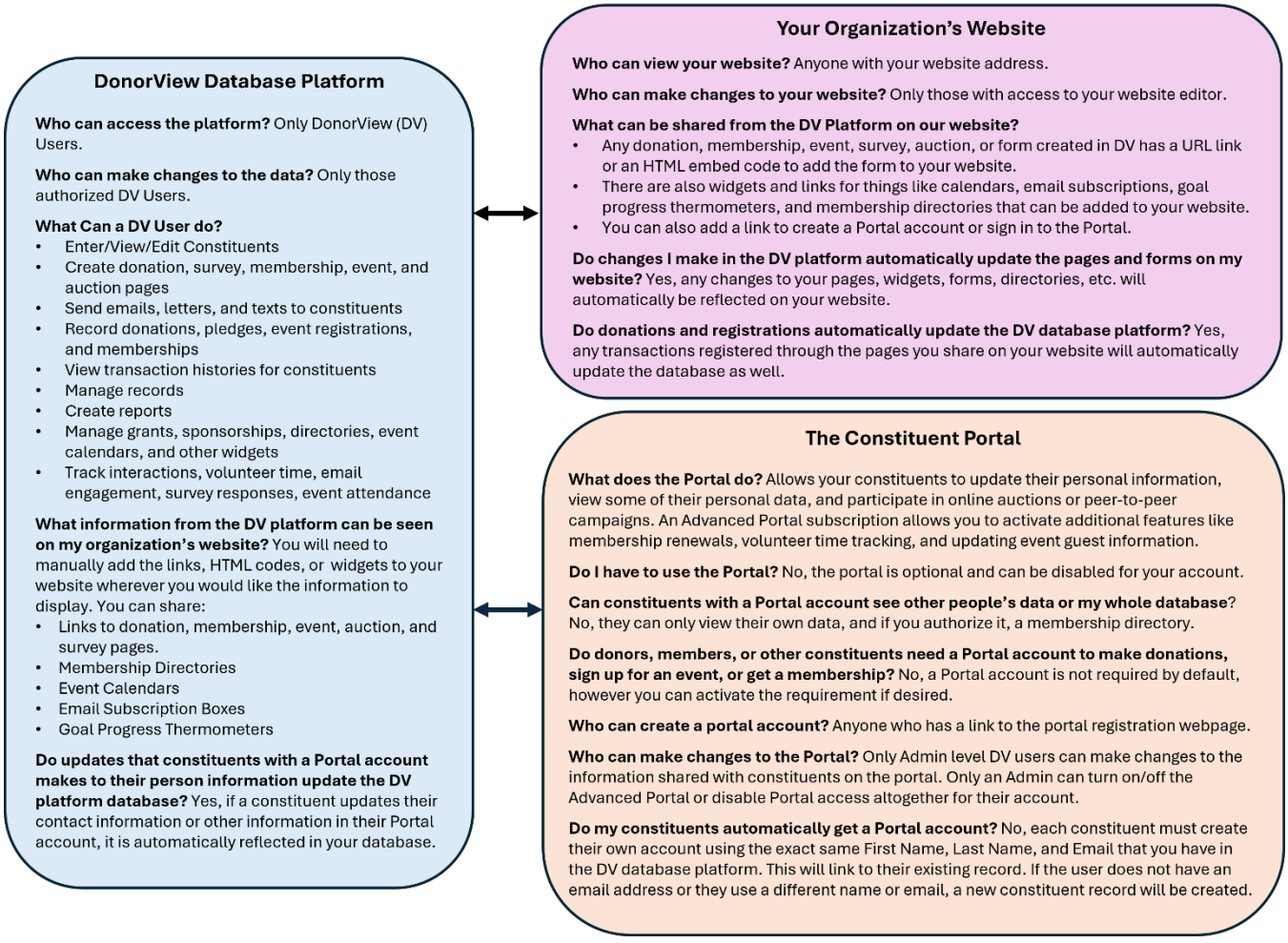
Are portal accounts automatically created?

No, a constituent must create a portal account by signing up. They must use the exact same First Name, Last Name, and Email address to link to their existing record in the database. See this article for information about inviting your constituents to create a portal account.

How do DonorView, the Portal, and my website work together?

- DonorView, also known as a CRM database platform, is where all you constituent data records are stored. This is also where you create the pages and widgets to add to your website.
- You can add links, embed your pages, and insert widgets that you created in the platform on your website. This is manually done by whomever manages the design of your website.
- The Constituent Portal is a website for your constituents to access their own personal information. You can add the link to register or login to the Portal to your website if desired. The constituents who create a Portal account can view and update their own personal information but cannot see anyone else's data.
- The graphic below outlines some more of the interfaces.

DonorView Database Platform-Website-Portal Interfaces



Can I use DonorView on my phone?

Because of the grid details and complexity of the views, the DonorView database platform is best viewed on a larger screen like a laptop or a desktop monitor. You will not be able to effectively manage the database from a phone. However, the pages you create, like your membership, event or donation pages, are all mobile optimized to look great on any mobile device. So, you can share your page links and QR Codes on your website, social media, or email, and they are accessible on any device with internet access.

Is there a mobile app for DonorView?

Yes, however it is a simpler version of DonorView that links back to the cloud-based version. The mobile app, DV Connect, is only available from iTunes for Apple devices and is not compatible with Android. It allows you to do things like sell events tickets at the door, check in guests for events, look up constituent records, allow volunteers to check in using Kiosk mode, and swipe credit cards using special swipers only available from DonorView. You can learn more about the mobile app's features and the swipers in their respective videos.

Self-Directed Training Checklist

Use this checklist to keep track of your training progress. Prioritize the activities you need to learn in the Priority column and record the date you have completed watching the video or reading the articles. Some items have already been marked as Priority "1", which should be reviewed by all users.

Priority	Date Complete	Workspace > Module	Sub Page, Grid, or Activity	Video/Article Links
N/A	N/A	All	Support Academy	Utilize the Support Academy to guide you through your learning journey. The Support Academy can be accessed in the link under your user initials. For more about the support academy, see this article: https://support.donorview.com/en/support/solutions/articles/9000273403-what-is-the-support-academy-
N/A	N/A	All	Support Article Library	https://support.donorview.com/support/solutions
N/A	N/A	All	Complete Video Library	https://vimeo.com/showcase/donorview Video Library Password: DVOnDemand
		Initial Training Videos	Three Video Series	Three video series sent to your team to help you with the transition, mastering the basics and learning about your training and support options. These videos are also available as the first three videos in the library.
1		General Information & Overview	Welcome	https://vimeo.com/912569881/1872bc1643
1		General Information & Overview	Glossary of Terms	https://support.donorview.com/support/solutions/articles/9000233603-glossary-of-terms-used-in-donorview
1		General Information & Overview	Module Overviews	https://support.donorview.com/support/solutions/folders/9000199537
1		General Information & Overview	Page Models	https://support.donorview.com/support/solutions/folders/9000199539
1		Grids, Dashboards & Software Functionality	Grid Features	https://support.donorview.com/en/support/solutions/folders/9000199004
1		Grids, Dashboards & Software Functionality	Views	https://support.donorview.com/en/support/solutions/folders/9000199002
1		Grids, Dashboards & Software Functionality	Actions	https://support.donorview.com/en/support/solutions/folders/9000192973
1		Grids, Dashboards & Software Functionality	Dashboards	https://support.donorview.com/en/support/solutions/folders/9000194638

Priority	Date Complete	Workspace > Module	Sub Page, Grid, or Activity	Video/Article Links
1		Grids, Dashboards & Software Functionality	Other Software Functions	https://support.donorview.com/en/support/solutions/folders/9000200493
		Grids, Dashboards & Software Functionality	Internal vs. External Page Views	https://vimeo.com/1103258578/f6050ece79
		Accounts Settings & Users	User Settings	https://vimeo.com/854737161/1e9ce73d90
		Accounts Settings & Users	Account User Management	https://vimeo.com/855057481/b5e75d53ea
		Accounts Settings & Users	Account Settings	https://vimeo.com/854765011/77847859fa
		Accounts Settings & Users	Bank Information	https://vimeo.com/995943291/d505c6cada
		Accounts Settings & Users	Saved Credit Cards & Expiration Notices	https://vimeo.com/995815593/48b4096f6c
		Accounts Settings & Users	Social Media Account Settings	https://vimeo.com/995810167/99aa87f100
		Accounts Settings & Users	Additional Payment Methods	https://vimeo.com/740724997/012dc30bd7
		Accounts Settings & Users	Account Billing	https://vimeo.com/855118617/2b7992c1cc
		Accounts Settings & Users	QuickBooks Integration	https://vimeo.com/813187042/0d93403940
		CRM	Constituent Grid	https://vimeo.com/736601453/2d4b19ceeb
		CRM	Individual Constituent Profiles	https://vimeo.com/731825511/8b3d78c045
		CRM	Company Constituent Profiles	https://vimeo.com/731485979/a09d752f6e
		CRM	Interactions & Follow-ups	https://vimeo.com/728927722/f2cda06fe1

Priority	Date Complete	Workspace > Module	Sub Page, Grid, or Activity	Video/Article Links
		CRM	Documents	https://vimeo.com/729692565/f8fbff7a6f
		CRM	Relationships	https://vimeo.com/730086196/27c9f732d5
		CRM	Time Tracking	https://vimeo.com/730375181/b0edf1d14d
		CRM	Mail Merge CRM Templates	https://vimeo.com/736515688/f61212d5c5
		CRM	Wealth Profiles	https://support.donorview.com/en/support/solutions/folders/9000200432
		CRM	Automated Actions	https://vimeo.com/736188833/a97f1fcc63
		CRM	Constituents Gifts Tab	https://vimeo.com/769454324/be33f26d51
		CRM	Constituents Events Tab	https://vimeo.com/showcase/9571518/video/725267365
		CRM	Constituents Memberships Tab	https://vimeo.com/722678541/a1db88bf91
		CRM	Constituents Engagement Tab	https://vimeo.com/851350132/20e742cdee
		CRM	Constituents Email Campaigns Tab	https://vimeo.com/727863993/642af25251
		CRM	Constituents Survey/Forms Tab	https://vimeo.com/738704389/a6fdc3cbfe
		CRM	Constituents Payment Options Tab	https://vimeo.com/851307936/4d92bc8822
		CRM	Direct Emails	https://vimeo.com/751690128/8d842c60da
		CRM	Background Checks	https://vimeo.com/1057860944/6a26d39d5b

Priority	Date Complete	Workspace > Module	Sub Page, Grid, or Activity	Video/Article Links
		CRM	Gmail Integration	https://vimeo.com/985869753/8560c5532e
		CRM	Outlook Email Integration	https://vimeo.com/988351233/d437a5590a
		CRM	End of Year Donor Tax Letters	https://vimeo.com/307701005/7684e6f732
		CRM	Moves Management	https://vimeo.com/646911269/6d6d16d41b
		Fundraising	Gifts Grid	https://vimeo.com/845697140/e698423966
		Fundraising	Entering & Managing Pledges	https://vimeo.com/846378072/4eeb670bcc
		Fundraising	Pledges Grid	https://vimeo.com/852989122/f04fb2870c
		Fundraising	Entering a Donation	https://vimeo.com/770830070/0d7aafea6b
		Fundraising	Entering an In-Kind Donation	https://vimeo.com/770827992/663f8edbfb
		Fundraising	Entering a Stock Donation	https://vimeo.com/846352580/a6abc36218
		Fundraising	Entering a donation via a Donation Page	https://vimeo.com/846388257/609ad251b6
		Fundraising	Donation Acknowledgment Letters	https://vimeo.com/852445511/fcc0bd6c06
		Fundraising	Pledge Acknowledgement Letters	https://vimeo.com/853415392/a38c609d49
		Fundraising	Tribute Notifications	https://vimeo.com/616897160/d7c5f1ef36
		Fundraising	Processing a Refund	https://vimeo.com/609725387/5127a760a7

Priority	Date Complete	Workspace > Module	Sub Page, Grid, or Activity	Video/Article Links
		Fundraising	Simple Donation Page Designer	https://vimeo.com/768146562/15a2b74a0b
		Fundraising	Advanced Donation Page Designer	https://vimeo.com/987235154/078317077f
		Fundraising	Advanced Donation Pages - Stacked Widget	https://vimeo.com/988349933/eb980d5a56
		Fundraising	Advanced Donation Pages - Progressive Widget	https://vimeo.com/985862324/cebb45ffbe
		Fundraising	Double the Donation	https://vimeo.com/1069632280/24923f3eb2
		Fundraising	Goal Progress Widgets	https://vimeo.com/764158934/034650bc79
		Fundraising	Sponsorships - Managing Deliverables	https://vimeo.com/850688116/fdfeda0782
		Fundraising	Grants Tracking	https://vimeo.com/851009955/06f8d73d05
		Fundraising	Advanced Analytics	https://vimeo.com/527763609/333b47f1cb
		Fundraising	Reports	https://support.donorview.com/en/support/solutions/articles/9000258780-fundraising-reports
		Events	Event Management & Guidelines	https://support.donorview.com/en/support/solutions/articles/9000236150-event-management-outline-checklist
		Events	Live Event FAQs	https://support.donorview.com/en/support/solutions/articles/9000236917-live-event-frequently-asked-questions
		Events	Single Occurrence Event Pages	https://vimeo.com/736154790/28f017a613
		Events	Recurring Event Pages	https://vimeo.com/753837782/c18226349a
		Events	Advanced option - Level Search	https://vimeo.com/985864542/24557a806d

Priority	Date Complete	Workspace > Module	Sub Page, Grid, or Activity	Video/Article Links
		Events	Event Attendee Info Custom Questions	https://vimeo.com/732471168/ab2a288419
		Events	Event Registration Auto Thank You Email	https://vimeo.com/747309989/73088ace2d
		Events	Summary Grid	https://vimeo.com/735773292/a2775b4c3a
		Events	Details Grid	https://vimeo.com/736213633/4644b47beb
		Events	Event Attendance Grid	https://vimeo.com/728826049/8dfe9b27d3
		Events	Event Registration Cancellations	https://vimeo.com/1070347752/ddc4a71f59
		Events	Group Assignments	https://vimeo.com/735850438/5b93b0c7a7
		Events	Table Assignments	https://vimeo.com/741142781/7d79d8b591
		Events	Calendar	https://vimeo.com/741949248/7a422a3201
		Events	Mail Merge Event Templates	https://vimeo.com/728823692/72dad4ab6a
		Events	Event Auto Reminders	https://vimeo.com/722260141/aa62e84e84
		Events	Theater Seating	https://support.donorview.com/en/support/solutions/folders/9000186917
		Events	Theater Seating Subscriptions	https://support.donorview.com/en/support/solutions/folders/9000194649
		Events	Gift Cards & Subscriptions	https://vimeo.com/527277194/616a7f663f
		Events	Event Expenses	https://vimeo.com/727422904/e9381cf185

Priority	Date Complete	Workspace > Module	Sub Page, Grid, or Activity	Video/Article Links
		Peer to Peer	P2P Event Guide & Checklist	https://support.donorview.com/en/support/solutions/articles/9000236877-p2p-guide-and-checklist
		Peer to Peer	P2P Event FAQs	https://support.donorview.com/en/support/solutions/articles/9000236878-faqs-for-peer-to-peer-campaigns
		Peer to Peer	P2P Fundraising	https://vimeo.com/197190005/45f2587426
		Peer to Peer	P2P Event Link	https://vimeo.com/763864527/4ab179c72a
		Volunteer	Volunteer Program Management	https://vimeo.com/463910317/9c2cfa3258
		Volunteer	Volunteer Events	https://vimeo.com/752550538/62b75b2ba5
		General Memberships	Creating Membership Pages	https://vimeo.com/856454132/e6deac3d49
		General Memberships	Pro-Rated Memberships	https://vimeo.com/743495749/30f7d26ea8
		General Memberships	Memberships Summary Grid	https://vimeo.com/845699139/15b464ecef
		General Memberships	Membership Internal Entry Feature	https://vimeo.com/752130340/5703774a41
		General Memberships	Memberships Details Grid	https://vimeo.com/845699674/9ef6643021
		General Memberships	Member Attendance Tracking	https://vimeo.com/720372559/8d4f928b05
		General Memberships	GM Mail Merge Templates	https://vimeo.com/720711830/fc96d5a156
		General Memberships	Membership Renewal Auto Reminders	https://vimeo.com/719969875/662f1b3439
		General Memberships	Members Only Documents	https://vimeo.com/720385437/4d16f4aac4

Priority	Date Complete	Workspace > Module	Sub Page, Grid, or Activity	Video/Article Links
		General Memberships	Member Directory	https://vimeo.com/722708194/ae52208589
		General Memberships	Membership Profile Widgets	https://vimeo.com/1070377425/cefc11061d
		General Memberships	Member Profile Pages	https://vimeo.com/1070454908/abee3b51f7
		Auctions	Auction Event Guide & Checklist	https://support.donorview.com/en/support/solutions/articles/9000236081-auction-event-guide-and-checklist
		Auctions	Auction Event FAQs	https://support.donorview.com/en/support/solutions/articles/9000236625-faqs-for-an-auction-event
		Auctions	Auction Page Creation & Management	https://vimeo.com/439042880/7b9664929d
		Auctions	Auction Event Links	https://vimeo.com/758810143/81a48565e8
		Email Marketing	Best Practices	https://support.donorview.com/support/solutions/articles/9000230441-email-marketing-best-practices
		Email Marketing	Contacts	https://vimeo.com/725352439/e4a815c92e
		Email Marketing	Template Editor	https://vimeo.com/359513863/4944fa1c4a
		Email Marketing	Campaigns	https://vimeo.com/728170284/a5b3ef2353
		Email Marketing	Auto Responder	https://vimeo.com/727829547/fd1ad3af64
		Email Marketing	Overview	https://vimeo.com/725750677/b542793a4a
		Text2Give and Text Marketing	Overview of Text Marketing	https://vimeo.com/200014866/3ebe518ed9
		Surveys/Forms	Single Page Survey/Form Creation	https://vimeo.com/742781980/46f69b49be

Priority	Date Complete	Workspace > Module	Sub Page, Grid, or Activity	Video/Article Links
		Surveys/Forms	Internal Survey/Forms	https://vimeo.com/738394627/a817d6de65
		Surveys/Forms	Survey/Forms Question Logic	https://vimeo.com/739715229/a20b8518a0
		Surveys/Forms	Survey/Forms Distribution Through Email	https://vimeo.com/739698117/e9bc03db9c
		Surveys/Forms	Survey/Forms Polls	https://vimeo.com/740854831/8a437e4934
		Surveys/Forms	Survey/Forms Results	https://vimeo.com/1069994071/d83dde0a0b
		Mobile App	DV Connect Features	https://vimeo.com/738265241/450ca22c8a
		Mobile App	Stripe Credit Card Swiper	https://vimeo.com/1024079232/ec89adabb3
		Donor Portal	Advanced Portal Features	https://vimeo.com/859019983/d5b2c798cb
		Donor Portal	Advanced Portal Constituent Usage	https://vimeo.com/197283655/e26186c271
		Donor Portal	Invite Constituents to Create A Portal Account	https://support.donorview.com/en/support/solutions/articles/9000218756-how-do-i-invite-constituents-to-sign-up-for-the-portal-
		Donor Portal	Troubleshooting Portal Logins for your Constituents	https://support.donorview.com/en/support/solutions/articles/9000218757-how-can-i-help-a-donor-or-constituent-who-has-trouble-logging-in-to-the-portal-
		Youth Memberships	Overview of Process	https://vimeo.com/527928541/7de54623e2