

DONORVIEW

Start Strong:

10 Steps to DonorView Transition Success

10 Steps to Success

Step 1 – Understand the software structure and terminology

Step 2 – Engage your team in the process

Step 3 – Define your workflows

Step 4 – Complete your questionnaires

Step 5 – Prepare your data for conversion

Step 6 – Review your converted data and pages

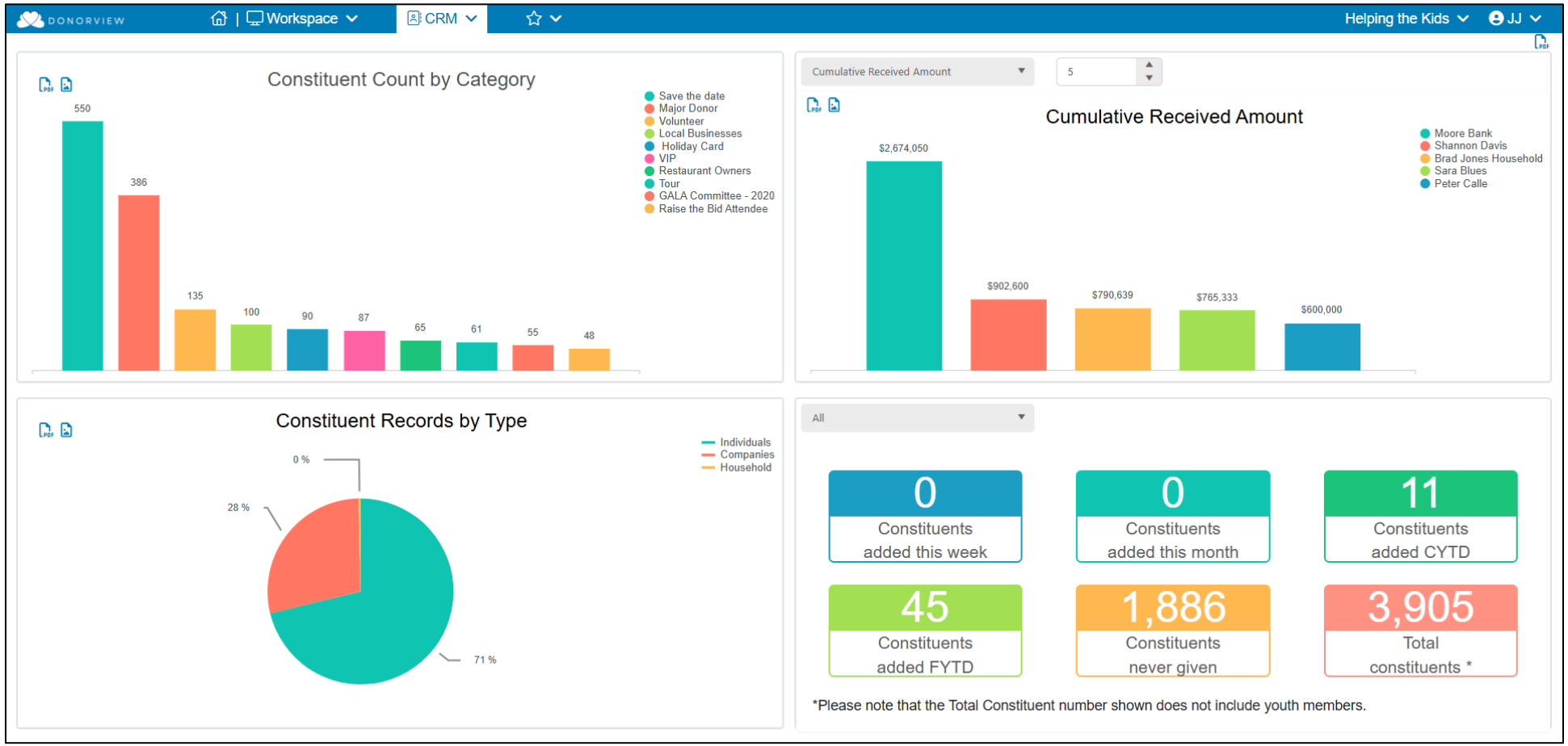
Step 7 – Complete verification of DNS

Step 8 – Prioritize training

Step 9 – Configure and customize thoughtfully

Step 10 – Create simple SOPs

Step 1 – Understand the software structure and terminology



Knowing how the data will be displayed in the software and the terminology used will help you complete your questionnaires and prepare your data.

Key Terms

Grid
The way the data is displayed in the software – appears similar to a spreadsheet

Page
Refers to the membership, event, and donation forms created in the software which are like mini-webpages that you can share, link, or embed into your website. These pages are required to collect payments and register constituents into your memberships and events.

Constituent
A constituent is any contact in your database. It can be a person, called an “Individual” profile type. Or, it can be an organization, business, or group, which is called a “Company” profile type. Each type of record counts as one constituent.

Member
A member is a specific sub-set of your constituents. All members are constituents, but not all constituents have to be members.

Last Name/Constituent Field
This field will show either the last name of an individual or the name of a company.

Company Field
On the grids, you will see a column labeled “Company” this indicates the name of the company record related to an individual. You can think of it like “employer.”



Step 2 – Engage Your Team in the Process

- Designate a database manager
- Include team members in the planning process
- Share the “Welcome” video with everyone

Step 3 - Define your workflows

Identify your routine tasks

This helps to identify all the activities you need to accomplish with the software

Prioritize

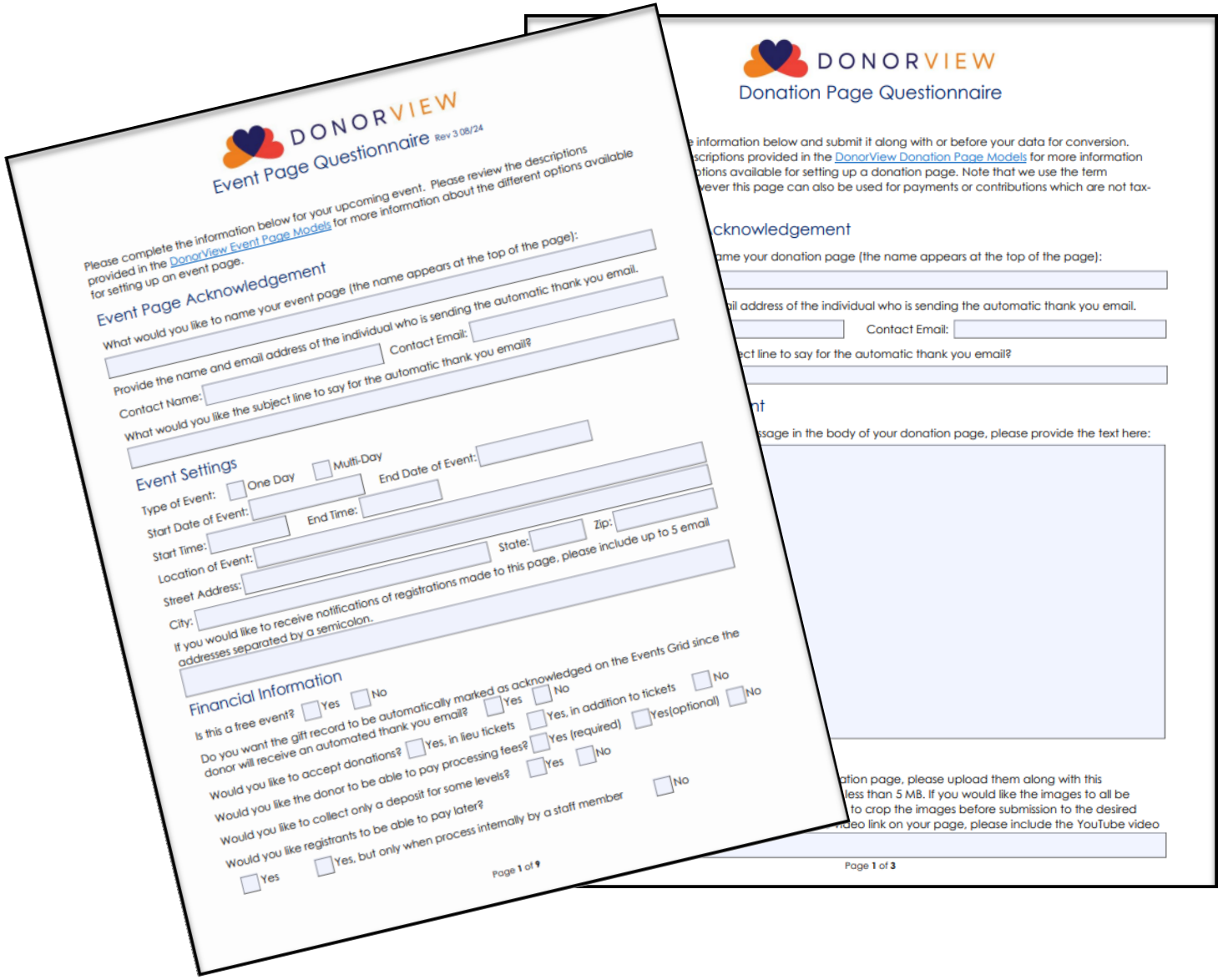
Select the daily and weekly tasks as your priority, then move on to the monthly, quarterly and annual.

Improves the implementation process

Understanding your organization's needs allows the implementation manager to guide you to the best set up options for your team

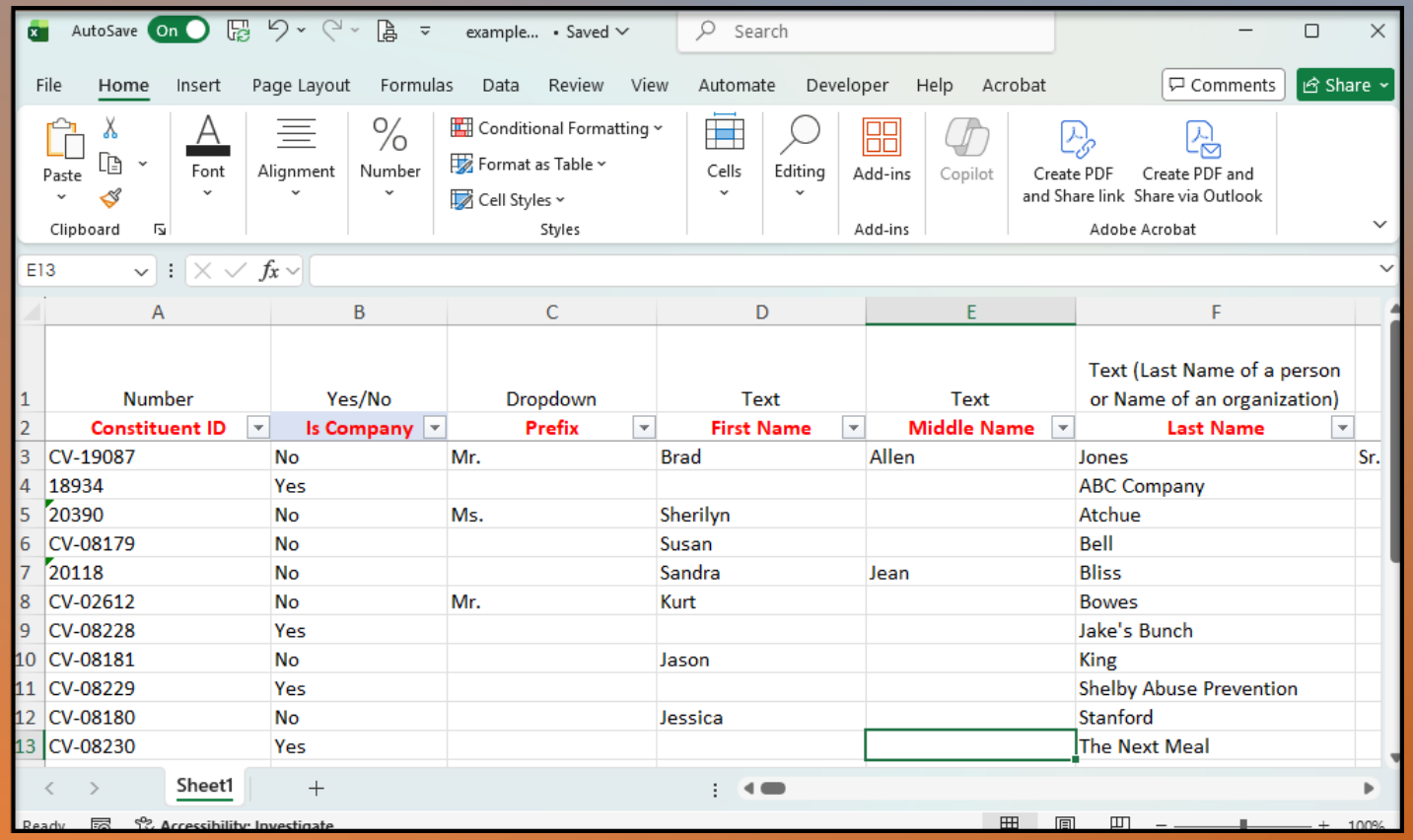


Step 4 – Complete your forms and questionnaires promptly



- Pages are required to set up donation pages, events pages, and import memberships
- Allows you to specify pricing, branding, and communication defaults
- Prompt completion ensures your implementation stays on track

Step 5 – Prepare your data for conversion

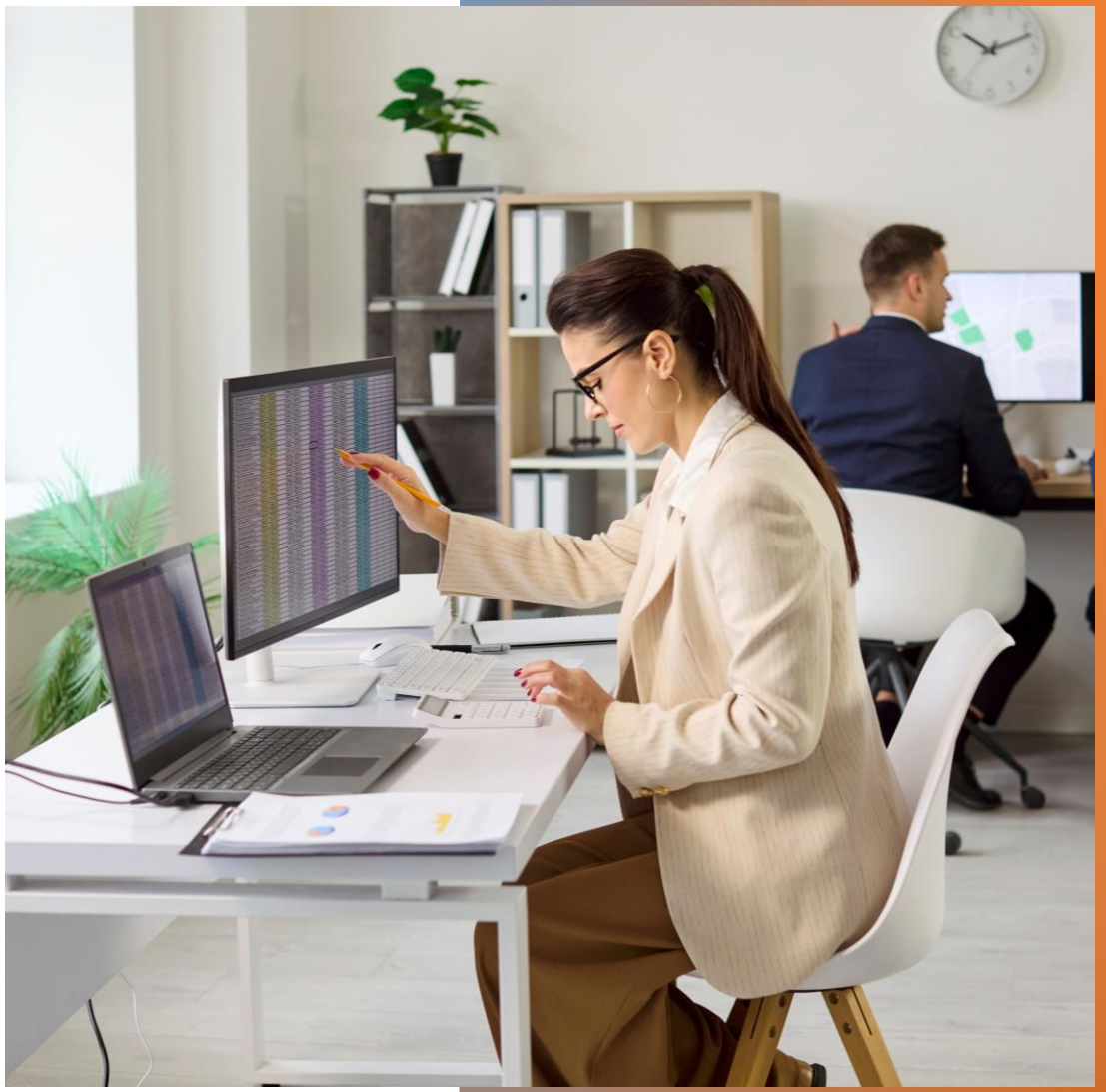


	A	B	C	D	E	F	
1	Number	Yes/No	Dropdown	Text	Text	Text (Last Name of a person or Name of an organization)	
2	Constituent ID	Is Company	Prefix	First Name	Middle Name	Last Name	
3	CV-19087	No	Mr.	Brad	Allen	Jones	Sr.
4	18934	Yes				ABC Company	
5	20390	No	Ms.	Sherilyn		Atchue	
6	CV-08179	No		Susan		Bell	
7	20118	No		Sandra	Jean	Bliss	
8	CV-02612	No	Mr.	Kurt		Bowes	
9	CV-08228	Yes				Jake's Bunch	
10	CV-08181	No		Jason		King	
11	CV-08229	Yes				Shelby Abuse Prevention	
12	CV-08180	No		Jessica		Stanford	
13	CV-08230	Yes				The Next Meal	

- Review the data prep tips and data fields guide
- Determine if custom fields will be needed
- Ensure individuals and companies are separate records
- Clean your data to remove duplicates and obsolete records

Step 6 – Rigorously review your converted data and pages

- Prior to importing the data into the software, the implementation manager will send it back to you for final review
- Spend time reviewing the data, ask other team members to review, too
- Make sure the pages look the way you would like and that all pricing and options are as expected

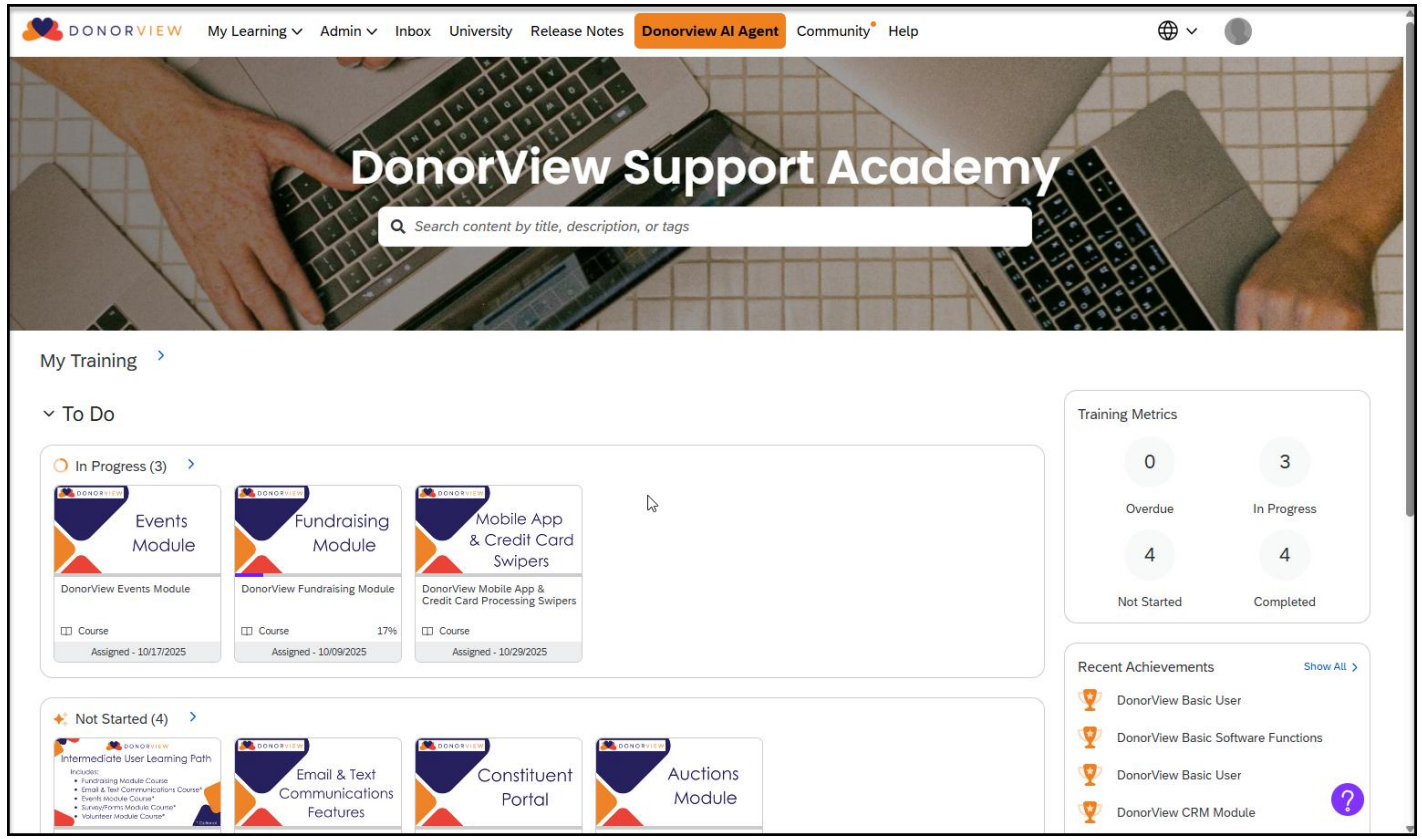


Step 7 – Complete Verification of DNS



- When sending emails from DonorView, you must use emails associated with your organization's domain name, like "yourname@yournonprofit.com"
- You will need to update your domain's Domain Name System (DNS) settings so that recipient email servers know it is your organization.
- 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 from the support team on performing this update and is available to assist as needed.
- The step is extremely important! Skipping this step will drastically increase the likelihood of your emails going to spam.
- Notify the support team when complete so they can update your account.

Step 8 – Prioritize training



Start anytime

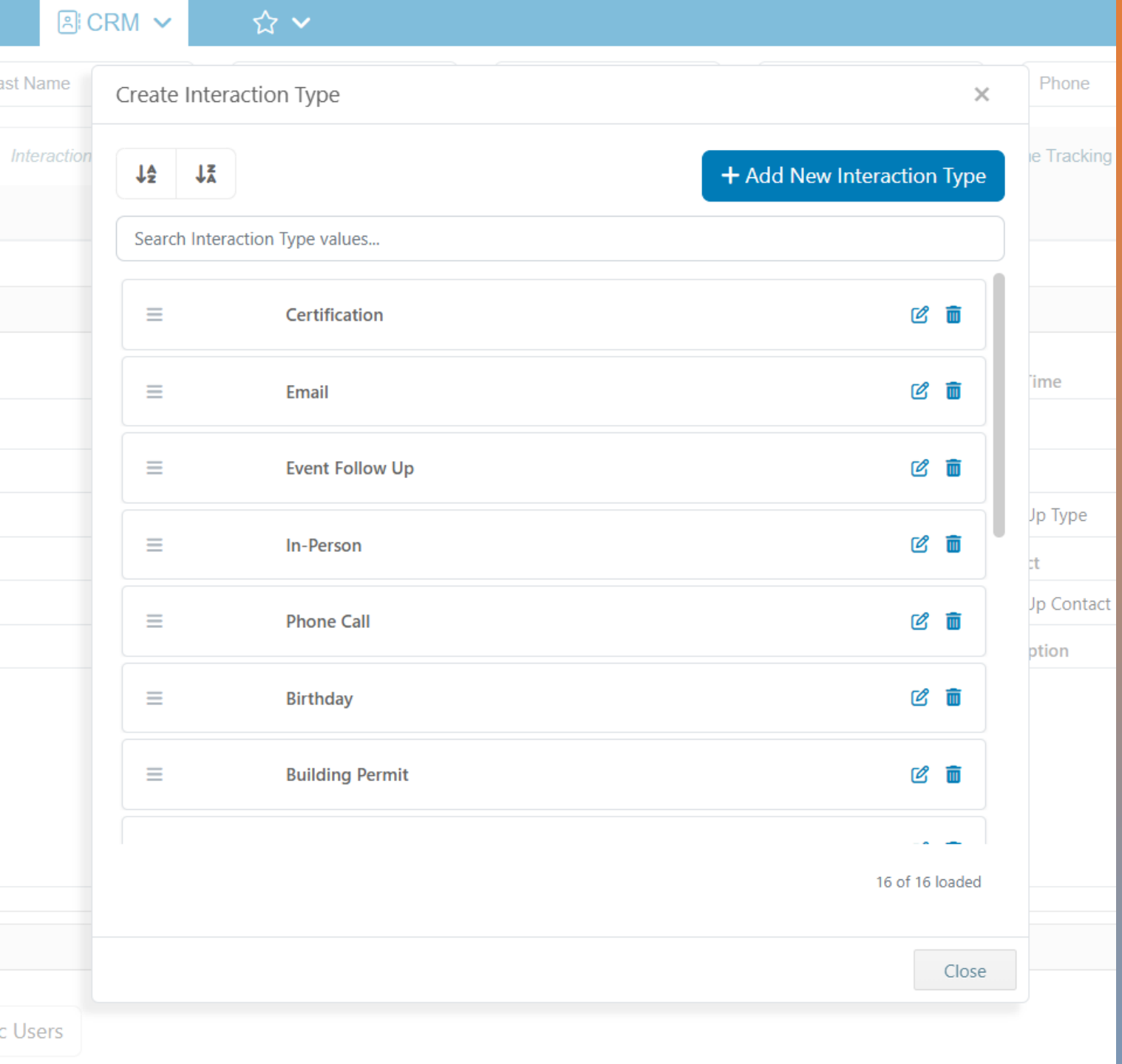
You can begin your training journey anytime, as soon as you would like to start using the software

Prioritize

From your workflow outline, prioritize learning your daily and weekly tasks first before moving on to the more advanced features

Progress is key

Learning a robust software takes time, so learn the basics and build your skills gradually



Step 9 – Configure and customize thoughtfully

- User-defined fields help with tracking and reporting specific information
- Be consistent with usage for best results
- Helps to have a database manager to coordinate requests

Step 10 – Create simple SOPs



Build from support articles

The support articles and videos provide lots of information, but every organization is unique and has their own preferences for how things are done

Applicable for your organization only

These can be a simple checklist used as an internal guide for how you prefer to do routine activities, like entering a membership

Helps current team members

Having a quick guide, like a short checklist, helps your team members feel confident that they are entering data correctly and keeps everyone consistent

Helps future team members

Having written instructions makes training new people easier



Support is Available

- The DonorView support team is here to answer questions, provide guidance, and resolve issues
- Get support by creating a support ticket or sending an email to support@donorview.com.

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Stay tuned for upcoming videos:

DonorView QuickStart: Mastering the Basics Build a strong foundation with this core training, covering the essential features and workflows you'll need to confidently navigate and use the CRM in your day-to-day work.

Next Steps: DonorView Training & Support Options Explore the full range of training and support options available to you, so you can choose the right resources for your role and learning journey.



Good luck on your journey and thank you for watching!