DONORVIEW

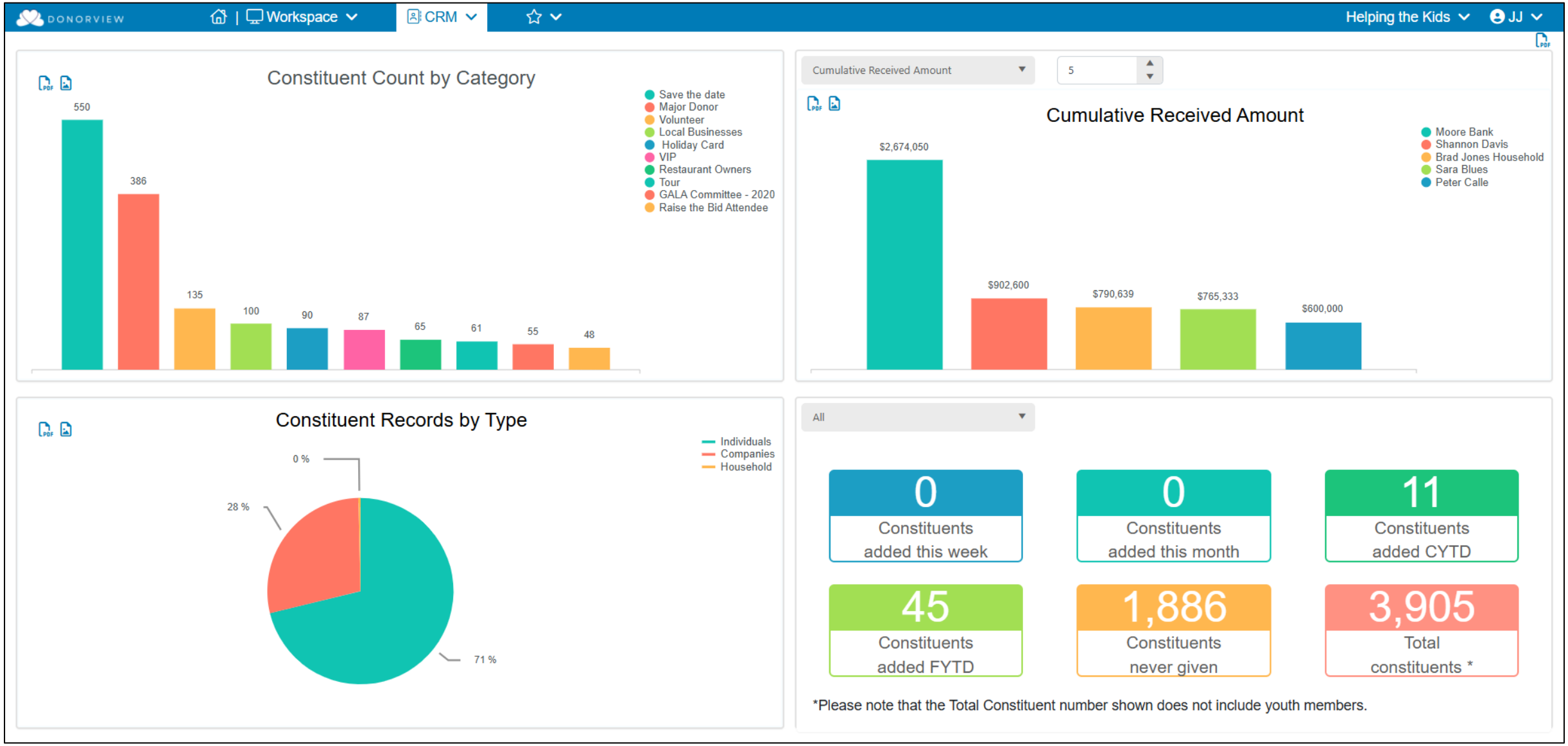
DonorView Quick Start: Mastering the Basics

Mastering the Basics

- Workspace Tour
- Key Terms
- CRM Module
- Fundraising Module
- Account Settings
- User Settings
- Next Steps



Workspace Tour



Key Terms

Grid - The way the software displays your data, it looks like a spreadsheet.

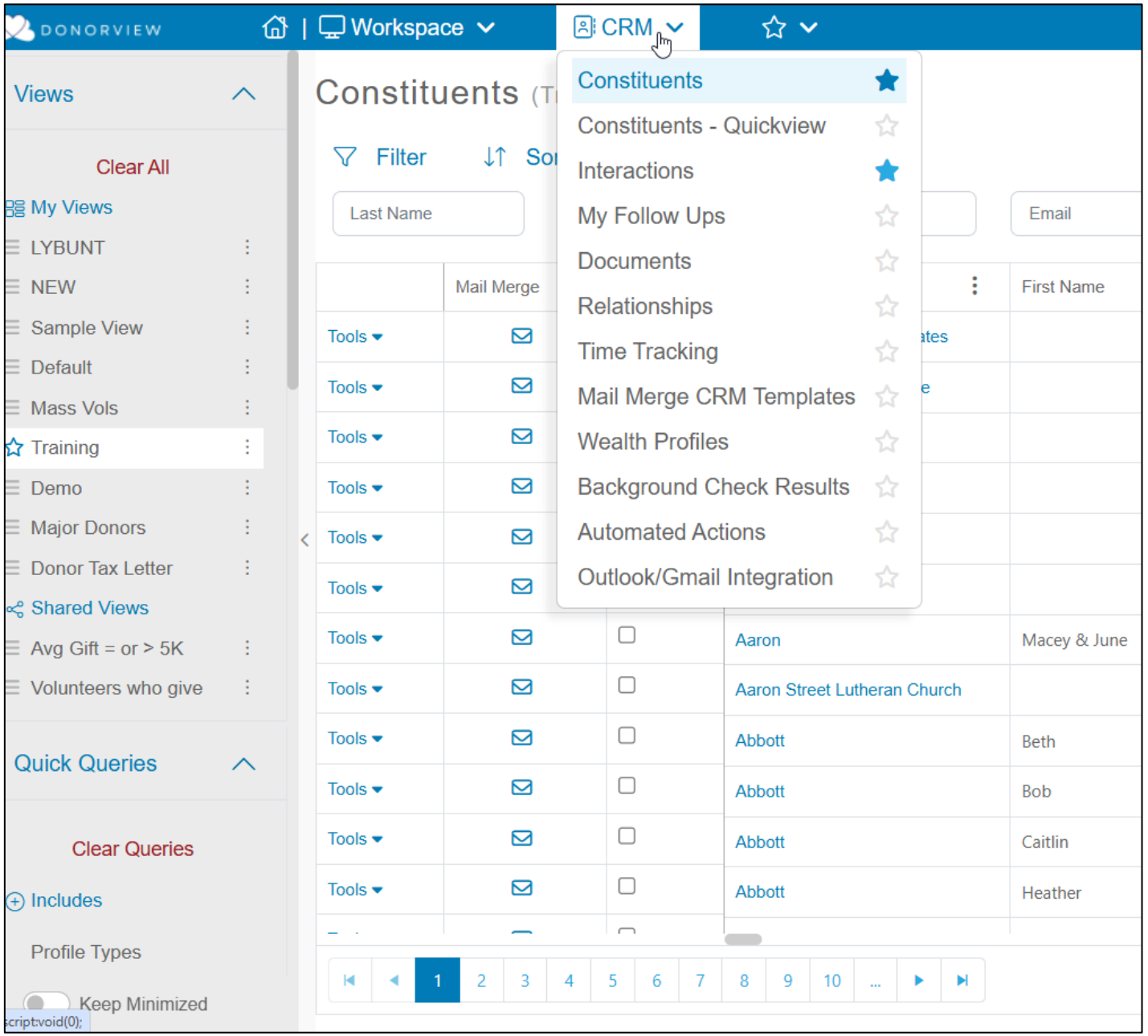
Page - Refers to the membership, event, and donation forms created in the software which are like mini-webpages that you can share, link, or embed into your website. These pages are required to collect payments and register individuals and companies into your memberships and events. Donations can be recorded directly into the software and do not require a donation page.

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. There is an optional "Household" profile which groups together individuals for financial reporting purposes. Each type of record counts as one constituent.

Member - A member is a constituent with a membership transactions associated with their record. All members are constituents, but not all constituents need to be members.

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

"Company" Field - On the grids indicates the name of the company record related to an individual. You can think of it like "employer."



CRM Module

- Constituent Relationship Management
- Shows all constituents (contacts) in database
- Includes summary and historical information
- Tracks all transactions, relationships, documents, interactions, and time tracking
- Provides access to details for each constituent
- Advanced features like wealth profiles, background checks, automated actions, and Gmail/Outlook email integration

Key Activities in the CRM Module

Search and View Constituent Profile Information

Search for specific constituents and see their entire history including donations, pledges, events, interactions, memberships, email clicks and more.

Link Constituents Together with Relationships

Create relationships between constituents showing business, community, and personal connections.

Track and Plan Interactions

Record contact with constituents and plan future tasks - great for tracking prospective donors and sponsors.

Enter New Constituents

Add new individual or companies to your database who are not yet members, but you would like to track interactions or communicate with them via text, email or letters.

Create Custom Reports

Generate reports to show specific segments of your lists like top-level donors and volunteers or lapsed donor lists.

Fundraising Module

Gifts Grid

Provides a spreadsheet view of all transactions recorded in the software

Pledges Grid

Track recurring gifts and pledges

Donation Pages

Create online donation pages

Goal Progress

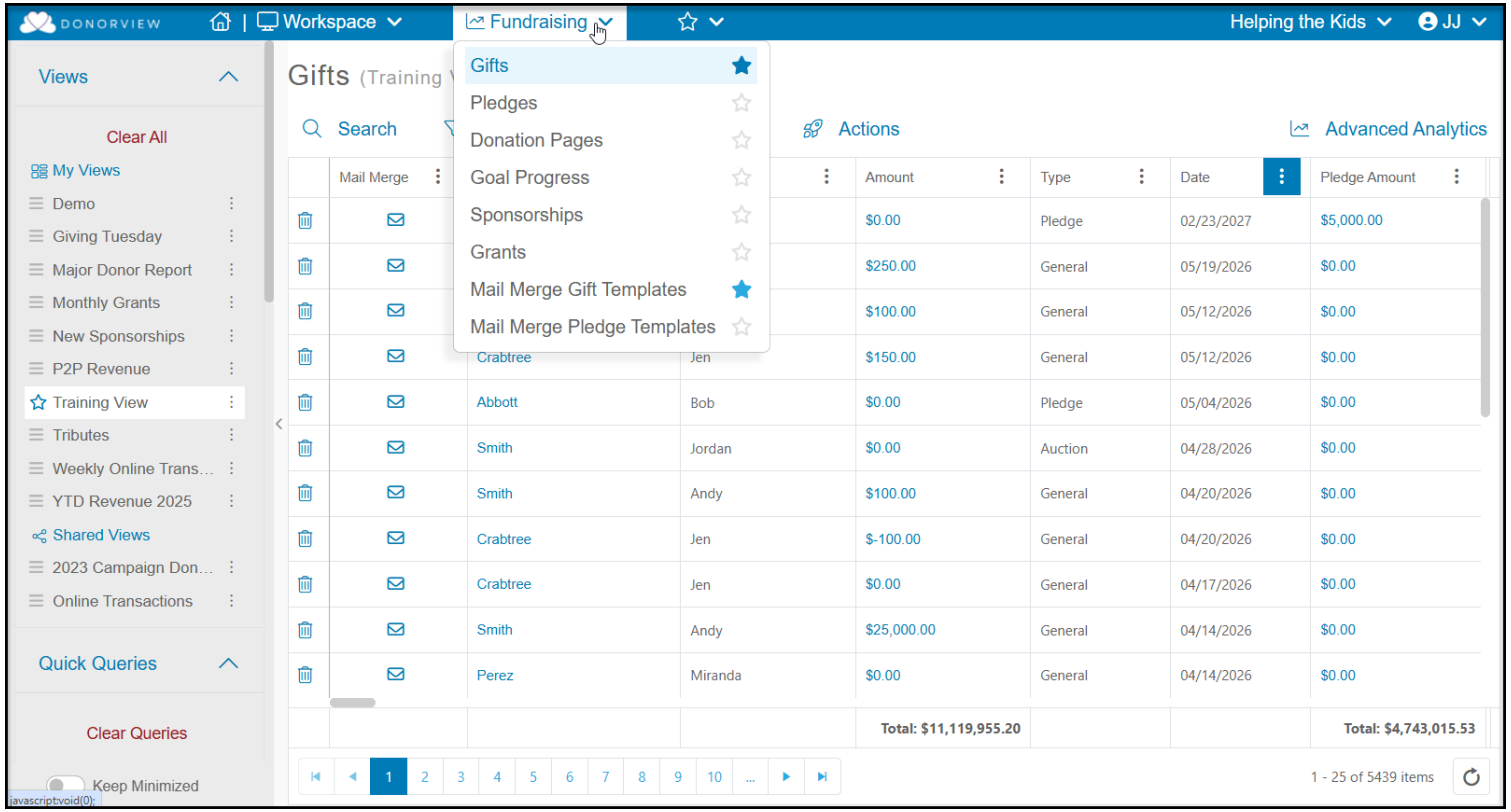
Create widgets for your website to track progress

Sponsorships & Grants

Track sponsorship and grant deliverables

Mail Merge Gift & Pledge Templates

Use the Mail Merge Gift or Pledge Templates pages to create manual thank you letters



Key Activities in the Fundraising Module

Enter Contributions and Pledges

Enter individual and batch gifts and record pledges and pledge payments

Send Acknowledgement Letters

Customize your acknowledgement letters to send personal thank you messages

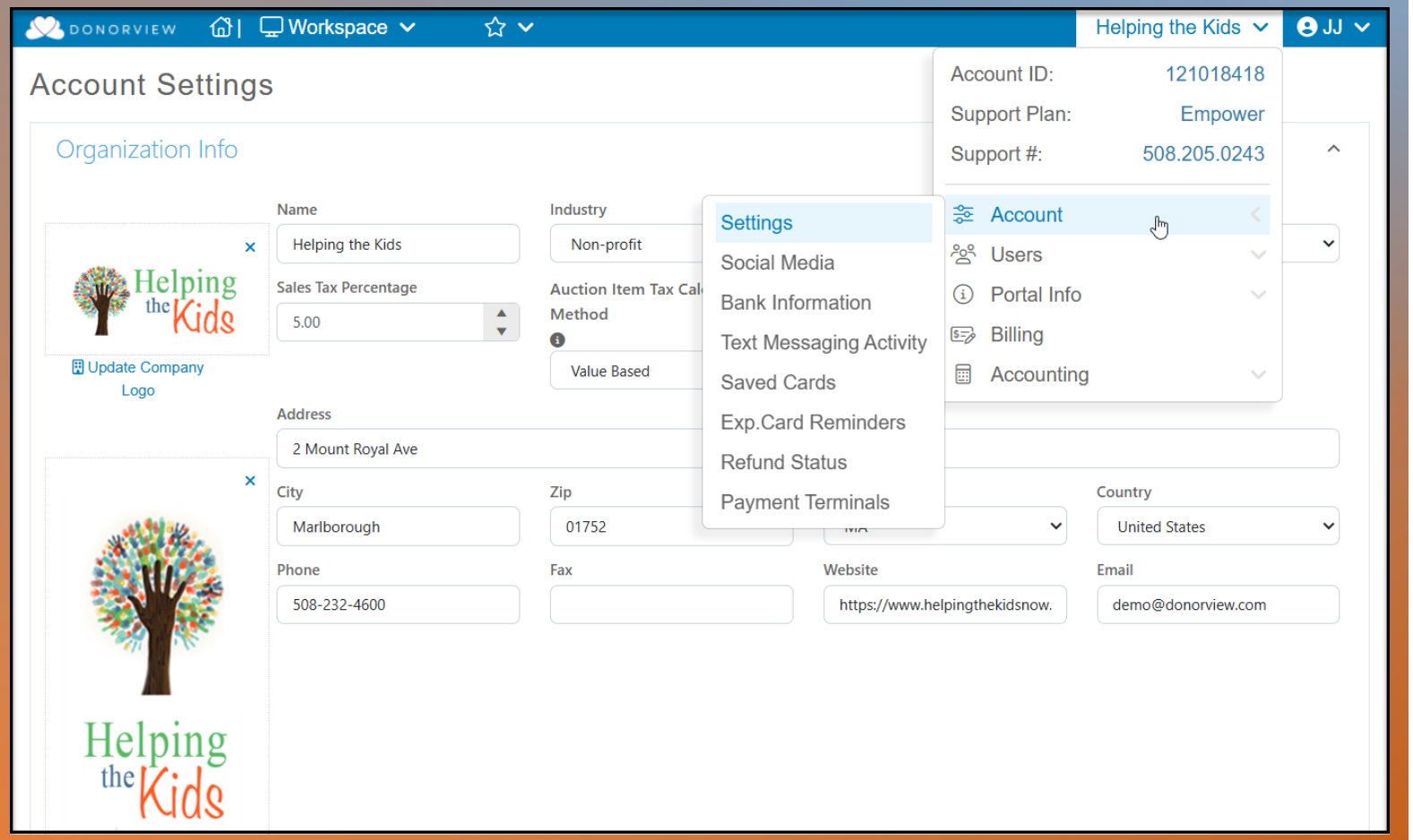
Create Online Donation Pages

Create unlimited donation pages that you can customize and share

Create Reports with Gifts Grid

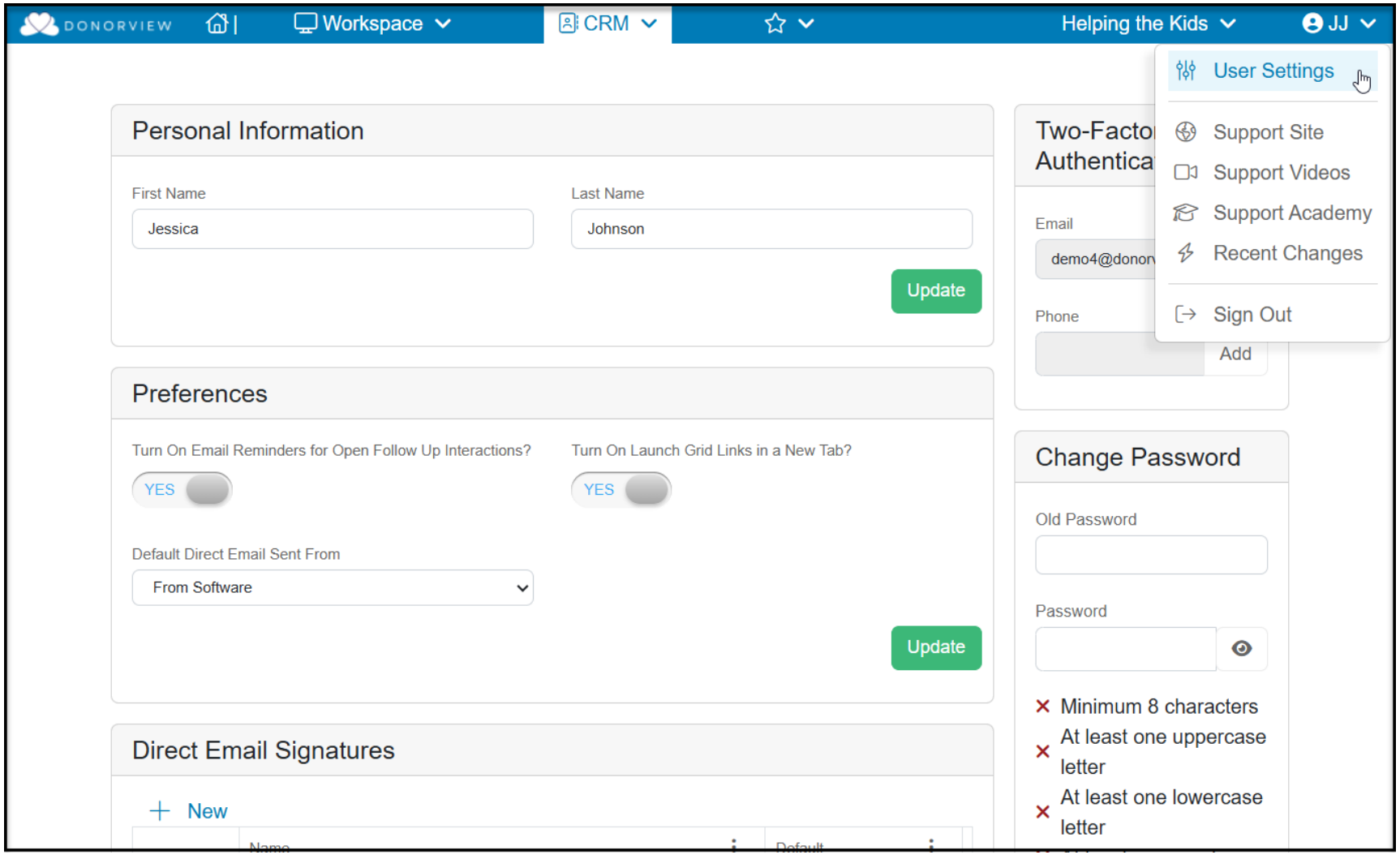
Filter the Gifts grid to revenue during specific date ranges or assigned to special revenue categories

Account Settings



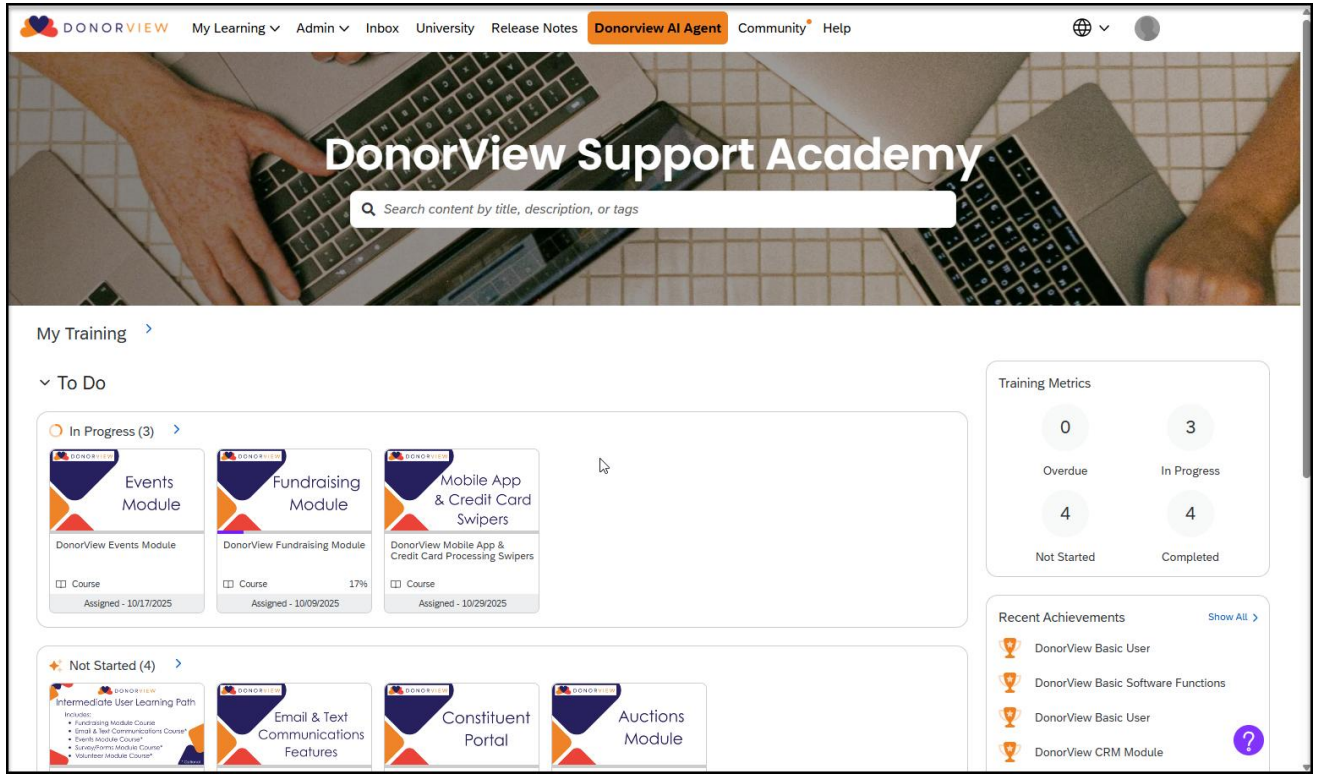
- Organization Account Settings
- Add/Edit Users
- Manager your Constituent Portal
- Review Billing and Credit Card Statements
- Interface with QuickBooks for Accounting

User Settings



- Manage Name and Two-Factor Authentication
- Set Preferences
- Update Password
- Establish Direct Mail Signatures and Templates
- Access Support and Training Resources

Next Steps



Complete Your Data Conversion

Once your data is converted, you are ready to fully integrate all your operations into DonorView

Customize Your Training Plan

Continue training using a variety of resources including videos, articles, and the Support Academy

Other Priority Modules & Features to Explore

- **Events** – to set up and manage any type of event where you want to collect registrations and track attendance.
- **Surveys/Forms** – to create volunteer applications, online forms, or event and membership satisfaction surveys.
- **Email Marketing** – to send newsletters, event invitations, and other communications to targeted email lists.
- **Volunteer** – to manage volunteer registration, time tracking, and scheduling.





Contact Support for Help

- 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:

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.

Review previous video:

Start Strong: 10 Steps to Transition Success
Kick off your CRM journey with this quick guide to 10 essential steps that help you prepare your data, define workflows, and set the foundation for a smooth and successful transition.

Good luck on your journey and thank you for watching!