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DONORDRIVE - How To



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I. Reports

Donation Report

1. Login to the DonorDrive **Admin**.
2. Click on the **Reports** tab from the top menu.
3. Find the **General Exports** section under **Data Exports**.
4. Click on the **Donations** link under **General Exports**.
5. To create a profile, select the **Create a Profile** button.
6. Type in a name for your report in the **Custom View Name** section.
7. In the **Available Fields** section, select the columns you would like to view in your report and move them over to the **Selected Fields** section. To move multiple fields at once, highlight one field, hold *Shift* or *Ctrl* to select multiple fields and then use the arrow buttons to move fields over.
8. Once the **Available Fields** are transferred over to the **Selected Fields** section, use the **Move to Top**, **Move Up**, **Move Down**, or **Move to Bottom** buttons to sort the fields in the order you would like the columns to appear in your report.
9. Click the **Advanced Features** button and then click **Add Filter**. Filters are important in order to ensure you are pulling a report specific to your event.
10. From the **Field** dropdown box select **Event Name**. From the second dropdown box select **Is Exactly**. In the third box type your event name. It is important you enter in the event name exactly as it is referred to in the DonorDrive system. If you accidentally enter in the event name incorrectly you could pull data for another campaign or from last year's campaign.
11. Create a second filter by clicking the **Add Filter** button.
12. From the **Field** dropdown box select **Event Fiscal Year**. From the second dropdown box select the current fundraising year of your campaign. By selecting the current fiscal year the system will recognize to pull data for the current year and not contain data from previous years.
13. Click the **Save Changes** button.
14. Once your custom view has been created and saved you should see it listed under the **profiles** tab. Highlight the custom view and click **Request a Download**.
15. Select your preferred format and then hit **Request Download**. The download will then begin downloading in the background.
16. Once it is ready for you to download DonorDrive will send you an email. You can then download the report by going back to the **Donations** export and then the **Your Downloads** tab. Then just hit **Download**.
17. If you would like to edit your custom view, go back to the previous page where the custom views are listed and click **Edit** instead of **Export**. You can create and edit as many custom views as needed. Custom views are saved for the next time you login to the backend of DonorDrive.



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Registration Report

1. Login to the DonorDrive **Admin**.
2. Click on the **Reports** tab from the top menu.
3. Find the **General Exports** section under **Data Exports**.
4. Click on the **Participant Registrations** link under **General Exports**.
5. To create a profile, select the **Create a Profile** button.
6. Type in a name for your report in the **Custom View Name** section.
7. In the **Available Fields** section, select the columns you would like to view in your report and move them over to the **Selected Fields** section. To move multiple fields at once, highlight one field, hold Shift or Ctrl to select multiple fields and then use the arrow buttons to move fields over.
8. Once the **Available Fields** are transferred over to the **Selected Fields** section, use the **Move to Top**, **Move Up**, **Move Down**, or **Move to Bottom** buttons to sort the fields in the order you would like the columns to appear in your report.
9. Click the **Advanced Features** button and then click **Add Filter**. Filters are important in order to ensure you are pulling a report specific to your event.
10. From the **Field** dropdown box select **Event Name**. From the second dropdown box select **Is Exactly**. In the third box type your event name. It is important you enter in the event name exactly as it is referred to in the DonorDrive system. If you accidentally enter in the event name incorrectly you could pull data for another campaign or from last year's campaign.
11. Create a second filter by clicking the **Add Filter** button.
12. From the **Field** dropdown box select **Event Fiscal Year**. From the second dropdown box select the current fundraising year of your campaign. By selecting the current fiscal year the system will recognize to pull data for the current year and not contain data from previous years.
13. Click the **Save Changes** button.
14. Once your custom view has been created and saved you should see it listed under the **profiles** tab. Highlight the custom view and click **Request a Download**.
15. Select your preferred format and then hit **Request Download**. The download will then begin downloading in the background.
16. Once it is ready for you to download DonorDrive will send you an email. You can then download the report by going back to the **Participant Registration** export and then the **Your Downloads** tab. Then just hit **Download**.
17. If you would like to edit your custom view, go back to the previous page where the custom views are listed and click **Edit** instead of **Export**. You can create and edit as many custom views as needed. Custom views are saved for the next time you login to the backend of DonorDrive.



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Custom Registration Questions Report

1. Login to the DonorDrive **Admin**.
2. Click on the **Reports** tab from the top menu.
3. Select the **Fiscal Year** and your **event name** in the dropdowns.
4. A list of reports will appear, click on the **Registration Questions Report** link.
5. Your data could appear on this page in the form of a graph or multiple graphs. To pull the actual data, click on the **Run Export Button**. Note: If there are multiple registration types for your campaign you'll need to run multiple reports.
6. You will then have the option to export it in to an **Excel Spreadsheet**.

Custom Donor Questions Report

1. Login to the DonorDrive **Admin**.
2. Click on the **Reports** tab from the top menu.
3. Select the **Fiscal Year** and your **event name** in the dropdowns.
4. A list of reports will appear, click on the **Participant Donations Questions Report** link.
5. Your data could appear on this page in the form of a graph or multiple graphs. To pull the actual data, click on the **Run Export Button**. Note: If there are multiple registration types for your campaign you'll need to run multiple reports.
6. You will then have the option to export it in to an **Excel Spreadsheet**.

Event Snapshot

1. Login to the DonorDrive **Admin**.
2. Click on the **Reports** tab from the top menu.
3. Select the **Fiscal Year** and your **event name** in the dropdowns.
4. A list of reports will appear, click on the **Event Snapshot** link.
5. This will show you graphs and a breakdown of all money raised.

II. Edit a Participant or Donation

Add or Remove Participant

1. Login to the DonorDrive **Admin**.
2. Click on the **Events** tab from the top menu.
3. Highlight your event and click **Edit**.
4. Click on the **Participants** tab from the left hand menu.



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5. Find the name of the participant you would like to add.
6. Once you have found the participant, highlight their name and click the **Move** tab on the right hand menu.
7. Make sure the appropriate event name is selected from the **Choose Event** dropdown box. Click the **Next Step** button.
8. Select the appropriate **Participant Type** if you have multiple registration types.
9. Under the **Participate as Individual or Join Team?** section, select **Individual** or **Join team**.
10. Hit the **Save Changes** button.
11. Re-enter any **Registration Questions** for the participant if necessary.
12. Verify that all the **Registration Questions** are filled out and then hit the **Next Step** button.
13. The participant has successfully been added or removed to and from a team.

Move Donation from General Fund

1. Login to the DonorDrive **Admin**.
2. Click on the **Events** tab from the top menu.
3. Highlight your event and click **Edit**.
4. Click on the **Event Revenue** tab from the left hand menu.
5. Find the name of the donor you would like to move.
6. Highlight the donor's name and click the **Move** tab on the right hand menu.
7. Under the **Move Donation To** section, select the **Event Participant** button.
8. Select the name of your event from the **Select event** dropdown box and the name of the participant you would like to credit the donation to under the **Select Participant** dropdown box.
9. Hit the **Save Changes** button.
10. The donation has successfully been credited to the participant's fundraising page.

Move Donation from Participant

1. Login to the DonorDrive **Admin**.
2. Click on the **Events** tab from the top menu.
3. Highlight your event and click **Edit**.
4. Click on the **Participants** tab from the left hand menu.
5. Find the name of the participant that the donation was given to.
6. Once you have found the participant, highlight their name and click the **Donations** tab on the right hand menu.
7. You should find the donor's name listed under the **Participant Donations** section.
8. Highlight the name of the donor and click the **Move** tab on the right hand menu.



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9. Under the **Move Donation** section, select the **Event Participant** button.
10. Select the name of your event from the **Select event** dropdown box and the name of the participant you would like to credit the donation to under the **Select Participant** dropdown box.
11. Hit the **Save Changes** button.
12. The donation has successfully been removed from the incorrect participant's fundraising page and credited to the correct participant's fundraising page.

Add Offline Donation to Participant

1. Login to the DonorDrive **Admin**.
2. Click on the **Events** tab from the top menu.
3. Highlight your event and click **Edit**.
4. Click on the **Participants** tab from the left hand menu.
5. Find the name of the participant in the **Viewing 'All Participants'** list or by typing the participant's name in the Search box.
6. Once you have found the participant, highlight their name and click the **Donations** tab on the right hand menu.
7. Click on the **Add Donation** button.
8. The donation you are adding must be attached to an existing constituent record in the DonorDrive system or you must add a new constituent record to tie the donation to. Although the participant you are crediting the donation to already has a constituent record, the donor who gave the cash/check donation to the participant must have a constituent record as well. You can **Search for a Constituent** to find an existing constituent record, but more than likely you will need to click the **Add Constituent** button to put them into the system. Most donors who give cash/check donations have never registered or donated through the DonorDrive system so they would not have an existing constituent record.
9. After clicking the **Add Constituent** button, you will need to fill out the **Name & Address**, **Phone** and **User Details** section for the donor. Fill out the information to the best of your ability. If you don't have all of the donor information, you can make up any required fields. Cash/check donations are not tracked by Children's Miracle Network Hospitals' national office and it is not mandatory for you to enter in cash/check donations. The purpose of entering in cash/check donations is to adjust thermometers to include these fundraising amounts.
10. If you don't have an e-mail address for the donor, check the **Offline Constituent** box under **User Details**.
11. Click the **Save Change** button.
12. Underneath the **Donations Details** section, fill out the **Donation Questions** (if applicable for your campaign), the **Donation Amount**, **Revenue Type**, **Payment Type**, and **Deposit Date**.



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Review and make changes to the **Donation Display Info**, **Special Instructions** and **Internal Notes** sections if desired.

13. Select **No** to **Send Confirmation E-mail**. Because all cash/check donations are given directly to your children's hospital and not to Children's Miracle Network Hospitals' national office, a tax receipt should not be sent to cash/check donors. Your children's hospital should take care of sending tax receipts for these donors.
14. Click on the **Complete Donation** button.
15. The cash/check donation has successfully been credited to the participant's fundraising. This amount will reflect on both the participant's thermometer and the event landing page thermometer.

Add Offline Donation to General Fund

1. Login to the DonorDrive **Admin**.
2. Click on the **Events** tab from the top menu.
3. Highlight your event and click **Edit**.
4. Click on the **Event Revenue** tab from the left hand menu.
5. Click on the **Add Donation** button.
6. The donation you are adding must be attached to an existing constituent record in the DonorDrive system or you must add a new constituent record to tie the donation to. You can **Search for a Constituent** to find an existing constituent record, but more than likely you will need to click the **Add Constituent** button to put them into the system. Most donors who give cash/check donations have never registered or donated through the DonorDrive system so they would not have an existing constituent record.
7. After clicking the **Add Constituent** button, you will need to fill out the **Name & Address**, **Phone** and **User Details** section for the donor. Fill out the information to the best of your ability. If you don't have all of the donor information, you can make up any required fields.
Cash/check donations are not tracked by Children's Miracle Network Hospitals' national office and it is not mandatory for you to enter in cash/check donations. The purpose of entering in cash/check donations is to adjust thermometers to include these fundraising amounts.
8. If you don't have an e-mail address for the donor, check the **Offline Constituent** box under **User Details**.
9. Click the **Save Change** button.
10. Underneath the **Donations Details** section, fill out the **Donation Questions** (if applicable for your campaign), the **Donation Amount**, **Revenue Type**, **Payment Type**, and **Deposit Date**. Review and make changes to the **Donation Display Info**, **Special Instructions** and **Internal Notes** sections if desired.
11. Select **No** to **Send Confirmation E-mail**. Because all cash/check donations are given directly



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to your children's hospital and not to Children's Miracle Network Hospitals' national office, a tax receipt should not be sent to cash/check donors. Your children's hospital should take care of sending tax receipts for these donors.

12. Click on the **Complete Donation** button.
13. The cash/check donation has successfully been credited to the general fund. This amount will be reflected on the event landing page thermometer.

Approve Pledges

1. Login to the DonorDrive **Admin**.
2. Click on the **Events** tab from the top menu.
3. Highlight your event and click **Edit**.
4. Click on the **Participants** tab from the left hand menu.
5. Find the name of the participant in the **Viewing 'All Participants'** list or by typing the participant's name in the Search box.
6. Once you have found the participant, highlight their name and click the **Donations** tab on the right hand menu.
7. Click on the **Pledges** tab found underneath the **Participant Donations** section. The system is set to display **Donations** by default. Note: You should be able to switch back and forth from **Donations** to **Pledges** on this page. A **Pledge** is an unverified donation entered in by a participant on their personal fundraising page. A **Donation** is a verified credit card/debit card transaction or a donation approved by an administrator. **Pledges** will show up on a participant's fundraising page, but a pledge will not affect the amount raised for the entire event. Once a pledge has been approved, it will transfer from being a **Pledge** to a **Donation** and will then impact the overall campaign.
8. Highlight the pledge you would like to approve and click on the **Approve** tab from the left hand menu.
9. The pledge you are about to approve must be attached to an existing constituent record in the DonorDrive system or you must add a new constituent record to tie the pledge to. You can **Search for a Constituent** to find an existing constituent record, but more than likely you will need to click the **Add Constituent** button to put them into the system. Most donors who give cash/check donations have never registered or donated through the DonorDrive system so they would not have an existing constituent record.
10. After clicking the **Add Constituent** button, you will need to fill out the **Name & Address, Phone** and **User Details** section for the pledge. Fill out the information to the best of your ability. If you don't have all of the information for the pledge donor, you can make up any required fields. Pledges are not tracked by Children's Miracle Network Hospitals' national office and it is not mandatory for you to approve pledges. The purpose of approving pledges is to adjust the event landing page thermometer.



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11. If you don't have an e-mail address for the pledge donor, check the **Offline Constituent** box under **User Details**.
12. Click the **Save Change** button.
13. Underneath the **Approve Pledge** section, review and make changes to the **Pledge Details** and **Internal Notes** sections if desired.
14. Click on the **Save Changes** button.
15. The pledge has successfully been approved. This amount will reflect on the event landing page thermometer.

III. Edit Event Information

Change Event Details

1. Login to the DonorDrive **Admin**.
2. Click on the **Events** tab from the top menu.
3. Highlight your event and click **Edit**.
4. Underneath the **Event Details** section you can update the venue, start and end date, check-in time, registration cut-off, donation cut-off and contact information for your event.
5. Hit the **Save Changes** button to update your campaign.

Change Event Settings

1. Login to the DonorDrive **Admin**.
2. Click on the **Events** tab from the top menu.
3. Highlight your event and click **Edit**.
4. Click on the **Settings** tab from the left hand menu.
5. Underneath the **Event Settings** section you can disable or enable the top fundraisers and teams' scoreboard, event details, thermometers and fundraising statistics for your event.
6. Hit the **Save Changes** button to update your campaign.

Edit Page Content

1. Login to the DonorDrive **Admin**.
2. Click on the **Events** tab from the top menu.
3. Highlight your event and click **Edit**.
4. Click on the **Event Content** tab from the left hand menu.
5. Highlight the name of the page you would like to edit. Select the group of pages you would like to



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change. Then select the specific page you would like to change.

6. Within the **Content Editor** you can directly type content into the **Page** box or copy and paste text directly from Notepad. Note: Do not copy and paste content directly from Word. Copying and pasting text into Notepad before pasting into the **Content Editor** will remove any html code associated with the text in Word.
7. Utilize the content editor icons in the toolbar to make additional modifications to your text.
8. Hit the **Save Changes** button to update your page.

Edit Emails

1. Login to the DonorDrive **Admin**.
2. Click on the **Events** tab from the top menu.
3. Highlight your event and click **Edit**.
4. Click on the **Event Notifications** tab from the left hand menu.
5. Select the group of emails you would like to edit from the tabs at the top. Then select the email you would like to edit.
6. Within the **Content Editor** you can directly type content into the email box or copy and paste text directly from Notepad. Note: Do not copy and paste content directly from Word. Copying and pasting text into Notepad before pasting into the **Content Editor** will remove any html code associated with the text in Word.
7. Utilize the content editor icons in the toolbar to make additional modifications to your text.
8. Hit the **Save Changes** button to update your email.

Update Registration Fees

1. Login to the DonorDrive **Admin**.
2. Click on the **Events** tab from the top menu.
3. Highlight your event and click **Edit**.
4. Click on the **Participant Types** tab from the left hand menu.
5. Highlight the participant type you would like to update and click the **Edit** tab from the right hand menu.
6. Make sure to have the **No Registration Fee** box checked if you would like to remove your registration fee. Uncheck the **No Registration Fee** box and enter in a fee amount if you would like to charge participants to register.
7. If you would like to allow participants to register early at a discounted price, make sure you have the regular (or late) registration fee price entered in as the **Registration Fee**. Once your **Registration Fee** has been entered into the system, select the **Enable Early Registration Fee**



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box. Enter in the **Early Registration Discount Fee** box the discounted registration fee and the date and time the discount will be available in the **Discount Available Until** box.

8. To change your **Minimum Fundraising Goal**, make sure the **No Minimum Goal** box is unchecked. Enter in your minimum fundraising goal. To remove the minimum fundraising goal, check the **No Minimum Goal** box.
9. Once you've updated your registration fee, early registration discount fee and minimum fundraising goal hit the **Save Changes** button.

Update Ticket Prices

1. Login to the DonorDrive **Admin**.
2. Click on the **Events** tab from the top menu.
3. Highlight your event and click **Edit**.
4. Click on the **Ticket Types** tab from the left hand menu.
5. Highlight the ticket type you would like to update and click the **Edit** tab from the right hand menu.
6. If you would like to edit your ticket price and the tax deductible amount, enter the amounts in the **Ticket Price** and **Tax Deductible Amount (of Ticket Price)** boxes.
7. Uncheck the **Unlimited** box if you would like to put in an amount for the **Max Tickets per order**. Check the **Unlimited** box if there is no limit to the amount of tickets that can be purchased per order.
8. Once you've updated your ticket price, tax deductible amount (of ticket price), max tickets per order and total tickets per order hit the **Save Changes** button.

Create Promo Code

1. Login to the DonorDrive **Admin**.
2. Click on the **Events** tab from the top menu.
3. Highlight your event and click **Edit**.
4. Click on the **Promotional Codes** tab from the left hand menu.
5. Click on the **Add Promotional Code** button.
6. Enter the **Code** you would like registrants to use to receive a discounted registration price.
7. Enter the percentage (%) or dollar amount for the **Discount**.
8. Uncheck the **Unlimited** box if there is a limit to the amount of uses. Enter the amount of participants who can use the promotional code in the Max Uses box.
9. Check the **Eligible Participant Type(s)** for those who can utilize the promotional code.
10. Hit the **Save Changes** button.
11. The promotional code has successfully been setup for your campaign.