FINAL CHECKLIST TO SELECT & SETUP ONLINE DONATION SOFTWARE SYSTEMS

Use this checklist as you compare various online donation software platforms, and as you get started implementing your new system.

* Does your org have a merchant account (bank account for accepting payments by debit/credit)?
* Does the online donation software offer the following features?
	+ Mobile giving
	+ Scheduled giving
	+ Recurring giving
	+ Billing profiles
	+ Customization
	+ Admin dashboard
	+ Track donations by method or fund
	+ At a glance giving reports
	+ Export to accounting software
	+ Enterprise-level framework & security
* Have you compared pricing for each of the following fees?
	+ Start-up fee \_\_\_\_
	+ Batch fee \_\_\_\_
	+ ACH/e-check transaction fee \_\_\_\_
	+ Credit card processing fee \_\_\_\_
	+ Monthly fee \_\_\_\_
	+ Customer service or misc. Fees \_\_\_\_
* Have you examined the security features?
	+ What are your encryption standards?
	+ Do you have an SSL?
	+ Who processes the payments?
	+ Who has access to user data and information?
* Have you setup your new system and planned promotional campaign?
	+ Add a button to your website (in the header or sidebar so every page include the button)
	+ Include button/link in your email marketing templates
	+ Check button/link functionality on mobile devices
	+ Add a Donate button to your Facebook page
* Plan your Kickoff Campaign
* Set up auto-response emails, thank you's, and follow-up communications