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