Ministry Brands
AMPLIFY™

End of Year Checklist

Giving & People

In Giving

- [ ] Make Sure Your Giving & People Modules Are Integrated
    - The Integration of Giving and People modules means that the two modules talk to each other seamlessly. Your digital gifts will automatically post to the appropriate Individual's record in the People module.
    - Enable the Integration.
    - Match your Giving funds to your People funds.

- [ ] Clear Out Your Sync Report
    - Make sure all digital donations have synced over to your ChMS so that your giving statements and reporting will contain accurate giving history for all donors.

In People

- [ ] Database Cleanup
    - Find duplicate records
    - Export and remove records
    - How to handle deceased individuals
    - How to handle divorced or separated families

- [ ] Consolidate Family Giving History

- [ ] Check the Tax-Deductible Status of Your Funds
    - Make sure each of your contribution funds is listed correctly as tax-deductible or not.
    - Select the top menu gear icon, then select Settings → Giving → Giving Options and Categories to review each fund. You will see a column noting the Tax-Deductible status to the right of the Active Categories for each Category (Fund).
    - Simply click on the gear for any Category to change this status.

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- [ ] Customize Your Giving Statements

- [ ] Do a Practice Run of Your Giving Statements

Try a practice run before sending the real statement. Pick a sample group and run statements for that group to check for issues.

- [ ] Send Giving Statements
  - How to print statements for mailing
  - How to email statements

New Update: You can now leave the page while your statements download in the background. You will get notified by the bell alert and email once they are ready. A small change that saves you time! CLICK HERE to learn more.

- [ ] Express Gratitude
  - Send personalized emails to donors, expressing gratitude for their contributions
  - Consider using various channels such as email, mail, or even a public acknowledgment during a service.

Pro-Tip: You can send mass email, text, and voice messages using your People module. CLICK HERE to learn more!

- [ ] Request Feedback
  - Request feedback from donors about their experience with the giving process.

Pro-Tip: You can use the form builder within your Giving or People modules to create a survey for donors to complete.