ParishSOFT Giving Moving Donors: Directions

If you have a pre-existing online giving vendor, please use the following guidelines to insure retention of donors and scheduled gifts as you move from your Legacy system to online giving.

**To get the ParishSOFT Giving link:**

After your ParishSOFT Giving account has gone live you will be given access to the ParishSOFT Giving Administration portal. It is here that you will obtain your new donor portal link.

**To obtain this link:**

* Log in to ParishSOFT Giving
* Click Organization, Settings
* Scroll to the right hand side of the page and click view integration code.
* You will have two options to choose from when deciding how to display the donor page:
	+ There is the link to the portal: Which can be copied and pasted to your website. This link will direct your donor to the new donor landing page where they can log in, make a donation and set up a recurring gift.
	+ Inline Widget: This option allows you to post a widget to your website. The widget allows your parishioner to make a donation or set up a recurring gift without leaving your parish website. The donor is prompted to enter in a donation amount and a pop up window will allow them to complete their donation.
* After obtaining your integration code, you will want to replace the link of your previous online giving System. This way all new donors will be directed to donate using ParishSOFT Giving.

**To notifying donors:**

You will now have a predetermined amount of time to get the donors using your Legacy system to sign up for ParishSOFT Giving. There are several options your parish has in order to make sure you get parishioners moved over before ending your use of your Legacy system.

* You will first want to make an announcement to the parish letting them know a new system is in place. We highly recommend utilizing the resources available in the ParishSOFT Giving System. You can have Fr. make an announcement, or use a letter template or email template to directly contact parishioners. Please be sure to include a link to the new system.
* Announce to the parish that there will be an end date for the Legacy system and that the automatic gifts that they have set up in the previous system will not carry over. They will have to log in and create a new recurring gift.
* After parishioners have created a new donor profile they can be encouraged to end their pre-existing gift themselves or contact the parish to ensure their gift no longer processes.

**IF YOU HAVE ACCESS TO DONOR PAYMENT INFORMATION AND WOULD LIKE TO MANUALLY MOVE DONORS TO THE NEW SYSTEM:**

If you have access to your donor’s payment information it may be possible for you to manually move your parishioners from your legacy system to the new ParishSOFT Giving system. Note that you will need to notify your parishioners of the change and that certain gift dates may not be available depending on how your legacy system was set up. To do this:

* Create a donor profile for the parishioner as if they were doing it themselves (email is required)
* Create recurring gift by selecting the Scheduled Giving tab.
* Use the payment information you have available or contact the parishioner in order to obtain.

If you do not have their information you may have to contact each parishioner using the Legacy system to obtain their new payment information. I have attached a form that your parishioners can fill out if they would like the parish to create their giving schedule for them.

We recommend reminding parishioners every month of the change in venders. One month before you plan on discontinuing your legacy system you should make an announcement letting those who have not switched know that their gifts will no longer process.