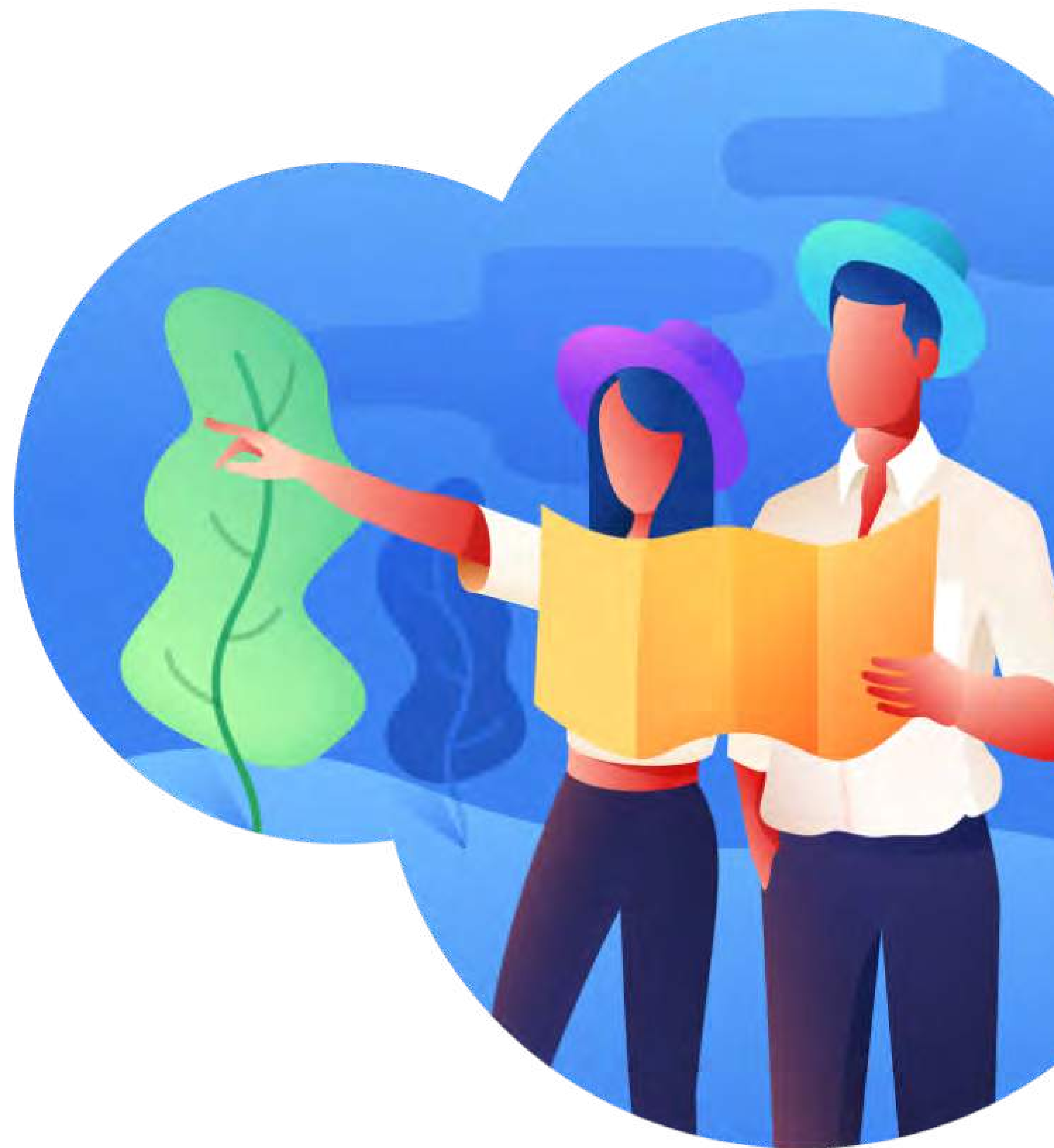


Simple Donation

Switching online giving providers can be complex.

We aim to make it simple.



Concerned about your recurring donors?

One of the reasons churches hesitate to switch online giving providers is that they don't want the hassle of migrating their recurring donations from one system to another. It usually means a lot of work for both the donor and the church staff. Let Simple Donation help. We've helped lots of other churches through this and would love to help you too.



The process for migrating over the recurring giving transactions was very smooth. We had approximately 2200 ongoing recurring transactions. They all came over very smoothly. It was seamless. We're loving it.

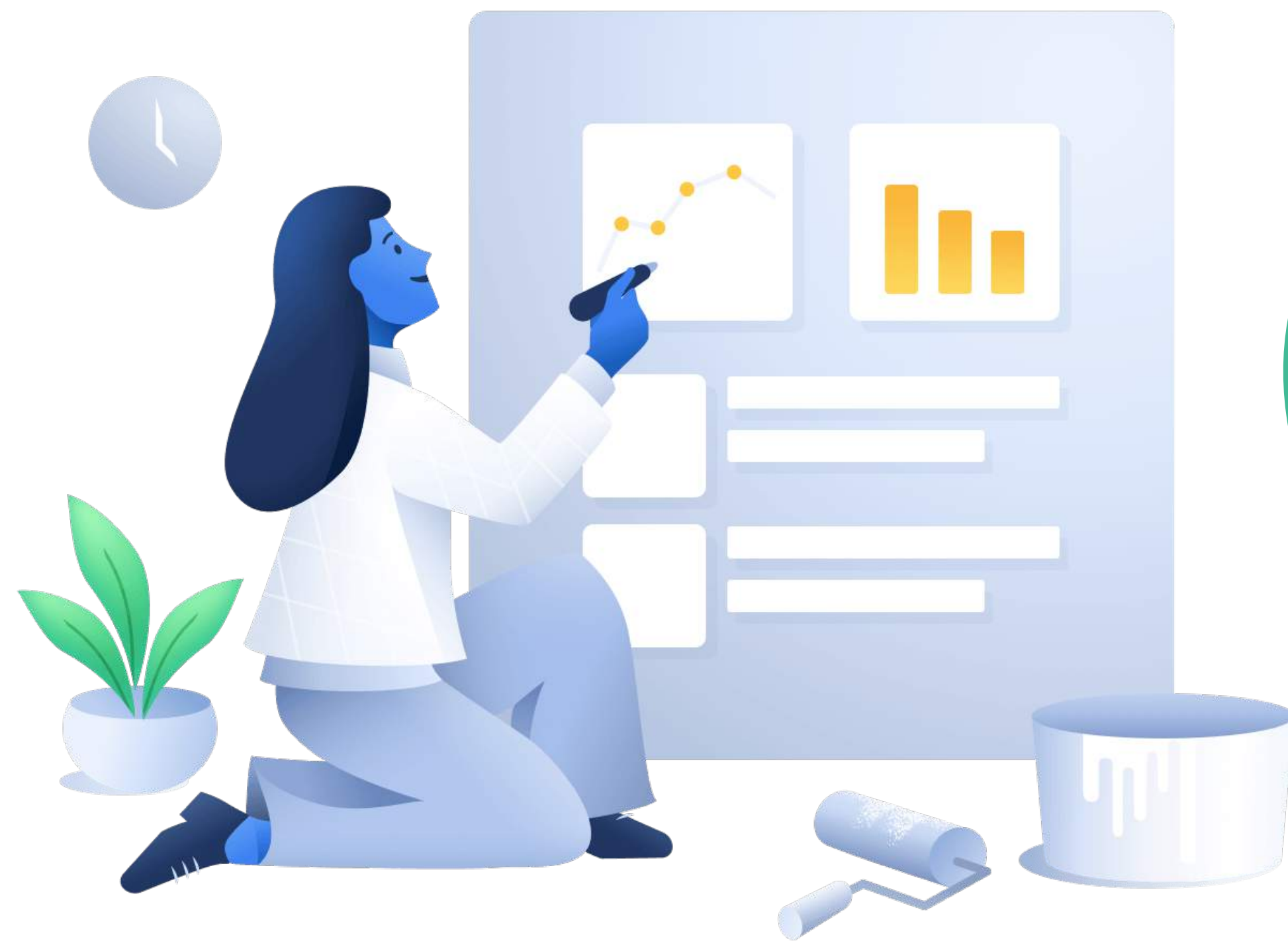
Traci Fougrousse | Application Systems Analyst |
Fellowship Northwest Arkansas



You're in **good** company.

Simple Donation is trusted by many churches in the Rock community





Who you switch from
makes **all** the difference

Some companies make it easy to switch, others don't.

Cooperative Companies



These companies tend to view card holder data as portable and will migrate it in a secure and PCI compliant way so that recurring gifts can continue with your new company automatically.

Uncooperative Companies

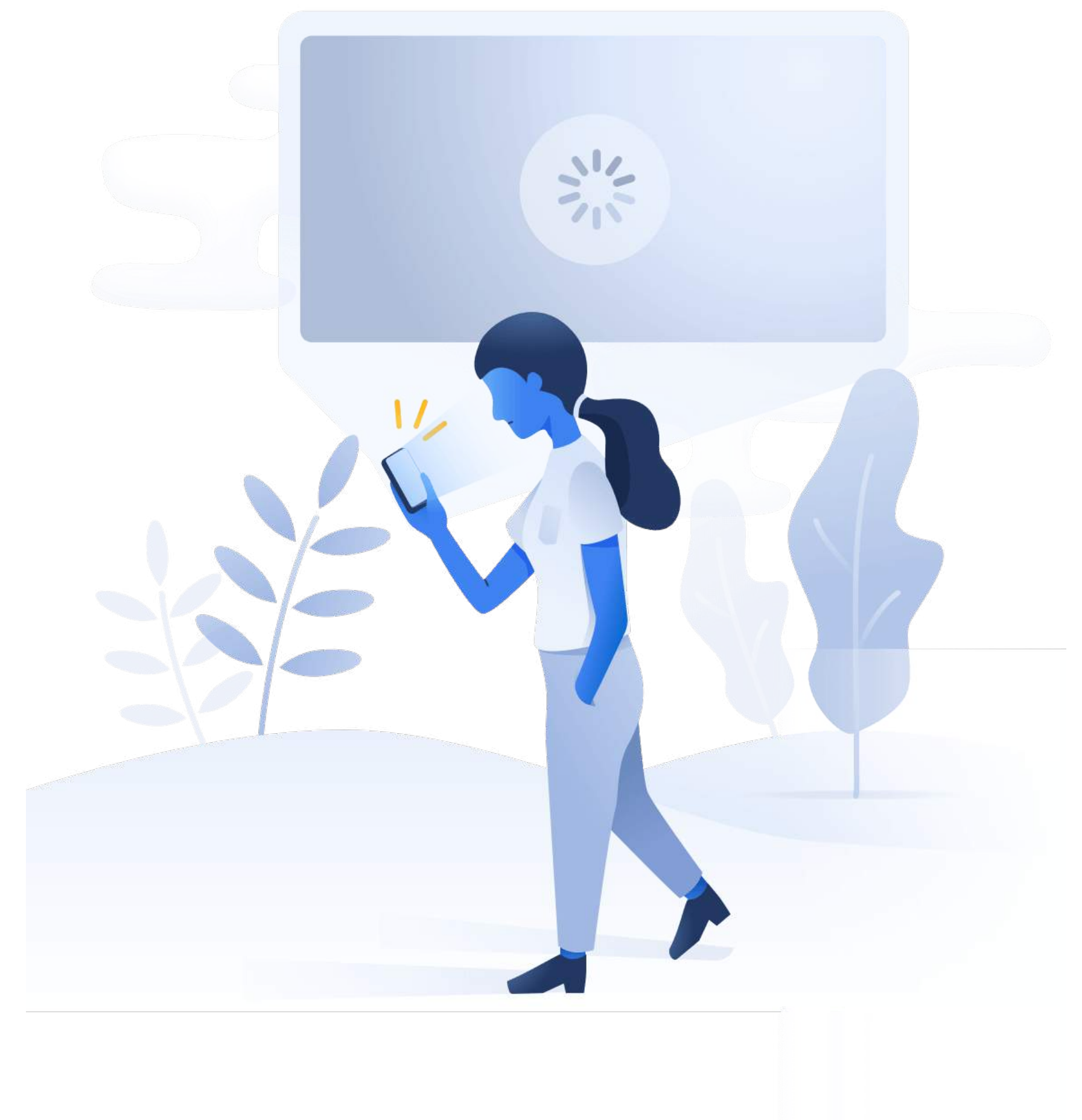


These companies tend to refuse to cooperate with migrating cardholder data making the migration process more manual, often requiring work by some if not all recurring givers.

How Do You Know?

Just ask.

Often companies will answer, **“we can’t.”** This really means either, **“we won’t,”** or **“we might, but only if you’re really insistent.”** Technically it is possible to migrate payment methods in a secure and PCI compliant way using encryption and secure transmission of data. To make it easier for you, we’ve prepared an email template you can send them to ask them if they’ll cooperate.





Life is beautiful when you can flip a switch.

In a short amount of time you can have
a new giving provider and **not loose
your recurring givers.**

Trust us we've done this a time or two.

Here's a quick look into this process



Put Simple Donation in Contact with Current Provider



Download recurring giving schedule

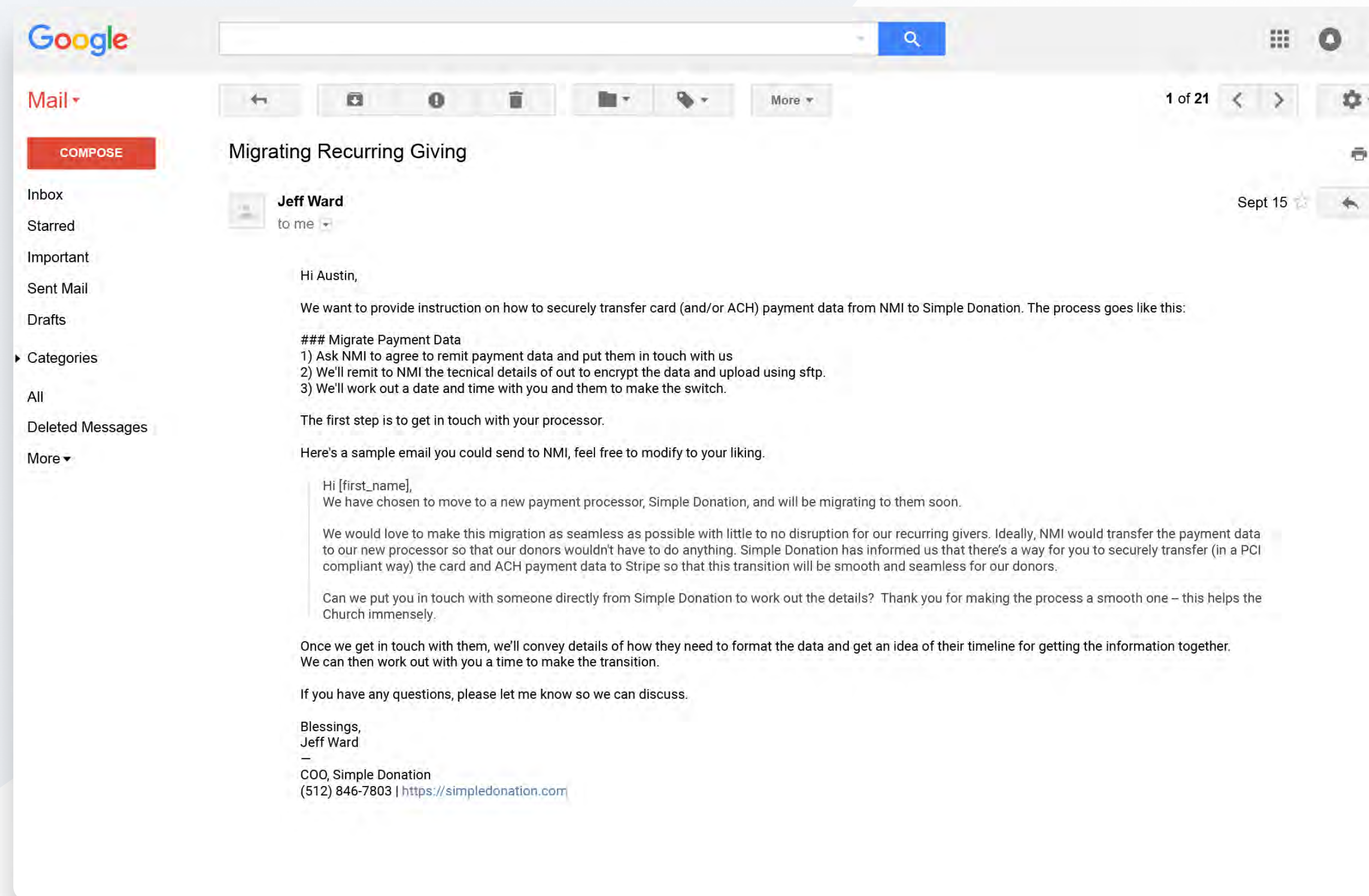


Pick a date to switch

Step 1

Put us in contact with your current provider so we can coordinate migration of card data in a secure PCI compliant way.

We've got an email for that.



Step 2

Download the recurring giving schedule from your current provider or ChMS

Simple Donation

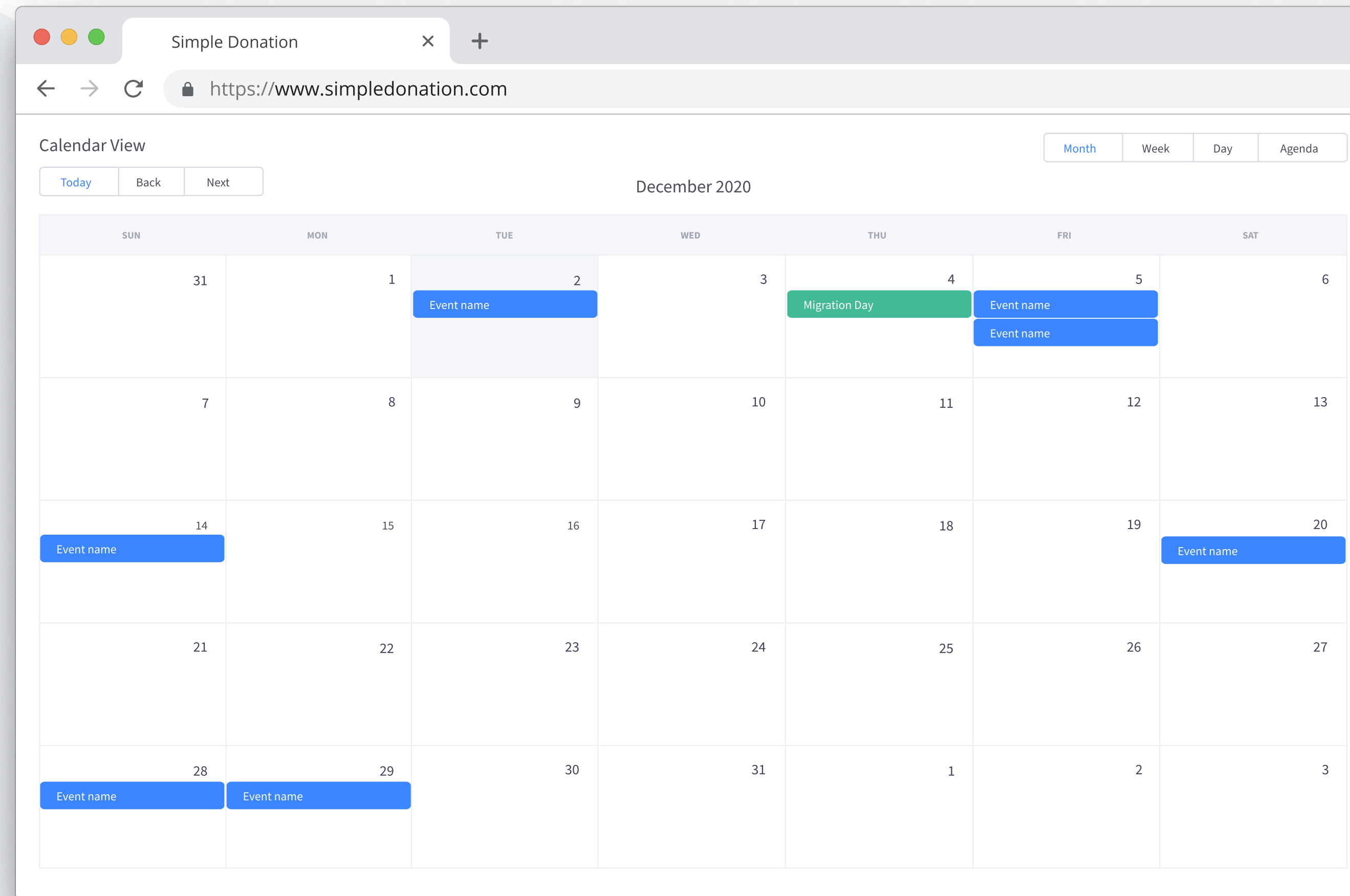
https://www.simpledonation.com

| | A | B | C | D | E | F | G | H |
|----|-----------------------|------------|-------------|-----------------------|-------------------|----------|------------|--------------|
| 1 | Id | First Name | Last Name | Email | Fund | Schedule | Created At | Next Renewal |
| 2 | recur_0685521a8b2db6 | Valentin | Thornsberry | munson@outlook.com | Where Needed Most | Monthly | 9/20/18 | 7/15/19 |
| 3 | recur_da10b7bf103965 | Aja | Byford | arandal@optonline.net | Where Needed Most | Monthly | 9/20/18 | 7/5/19 |
| 4 | recur_a57fe1a345fa76f | Andria | Harari | grady@aol.com | Where Needed Most | Monthly | 9/20/18 | 7/17/19 |
| 5 | recur_6358b13c41b0c8 | Debra | Gough | valdez@hotmail.com | Where Needed Most | Monthly | 9/20/18 | 7/3/19 |
| 6 | recur_49e4c59f67bd4c | Lavinia | Lard | stewwy@aol.com | Where Needed Most | Monthly | 9/20/18 | 7/3/19 |
| 7 | recur_45ea92fa03d31b | Isabelle | Novotny | yfreund@aol.com | Where Needed Most | Monthly | 9/20/18 | 7/5/19 |
| 8 | recur_f0985e4ca3f3149 | Kaleigh | Yardley | curly@me.com | Where Needed Most | Monthly | 9/20/18 | 7/11/19 |
| 9 | recur_647dc052e126c2 | Phil | Andry | peoplesr@mac.com | Where Needed Most | Monthly | 9/20/18 | 7/11/19 |
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| 12 | recur_6ab8218c8bddb0 | Candelaria | Mccarthy | mbalazin@hotmail.com | Where Needed Most | Monthly | 9/20/18 | 6/27/19 |
| 13 | recur_378f230d7b1f49 | Cindie | Kestler | josephw@verizon.net | Where Needed Most | Monthly | 9/20/18 | 7/2/19 |
| 14 | recur_a54a0e51c4769d | Oleta | Larosa | munson@outlook.com | Where Needed Most | Monthly | 9/20/18 | 7/2/19 |
| 15 | recur_9fce77bb268c15 | Sherita | Mckelvey | arandal@optonline.net | Where Needed Most | Monthly | 9/20/18 | 7/1/19 |
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| 19 | recur_8d34f8ceab6921 | Dorthea | Blakney | yfreund@aol.com | Where Needed Most | Monthly | 9/20/18 | 7/2/19 |
| 20 | recur_b4e4db98816867 | Gia | Iddings | curly@me.com | Where Needed Most | Monthly | 9/20/18 | 7/10/19 |
| 21 | recur_c2690299fccbbf6 | Stephane | Ropp | peoplesr@mac.com | Where Needed Most | Monthly | 9/20/18 | 7/12/19 |

sozo-export-2

Step 3

We'll work with you and your current provider to pick a date to flip the switch



We had nearly **3000** recurring gifts set up. One of our biggest concerns was making sure it was a smooth transition for the donors - that we could move to Simple Donation without all those donors having to go in and re-set-up the recurring giving. For the donors who already had recurring gifts, it was seamless. They didn't have to do anything.

Cathy Yanez | Director of Accounting | Bayside Church










So you have a provider unwilling to help?

Don't worry, **We've Got You!** Take a deep breath and we'll walk you through the entire process.

Here's a quick look into this process

-  Download recurring transactions from current provider
-  Send download to Simple Donation
-  Pages created in Rock for transaction status
-  Recurring Givers will be given a link to Rock for Setup
-  Staff swaps activations as donors add payment info



We really appreciated Simple Donation's help in making it easy for people to transition from our old giving platform to Simple Donation. They set up a system that allowed us to email links to each individual so they could quickly add payment info & be all set up. They also helped us track the process so we knew how we were doing in the transition. It was smooth, easy & simple for our folks!

Dave Clarke | Executive Pastor | Hope Evangelical Free Church

Communication is key

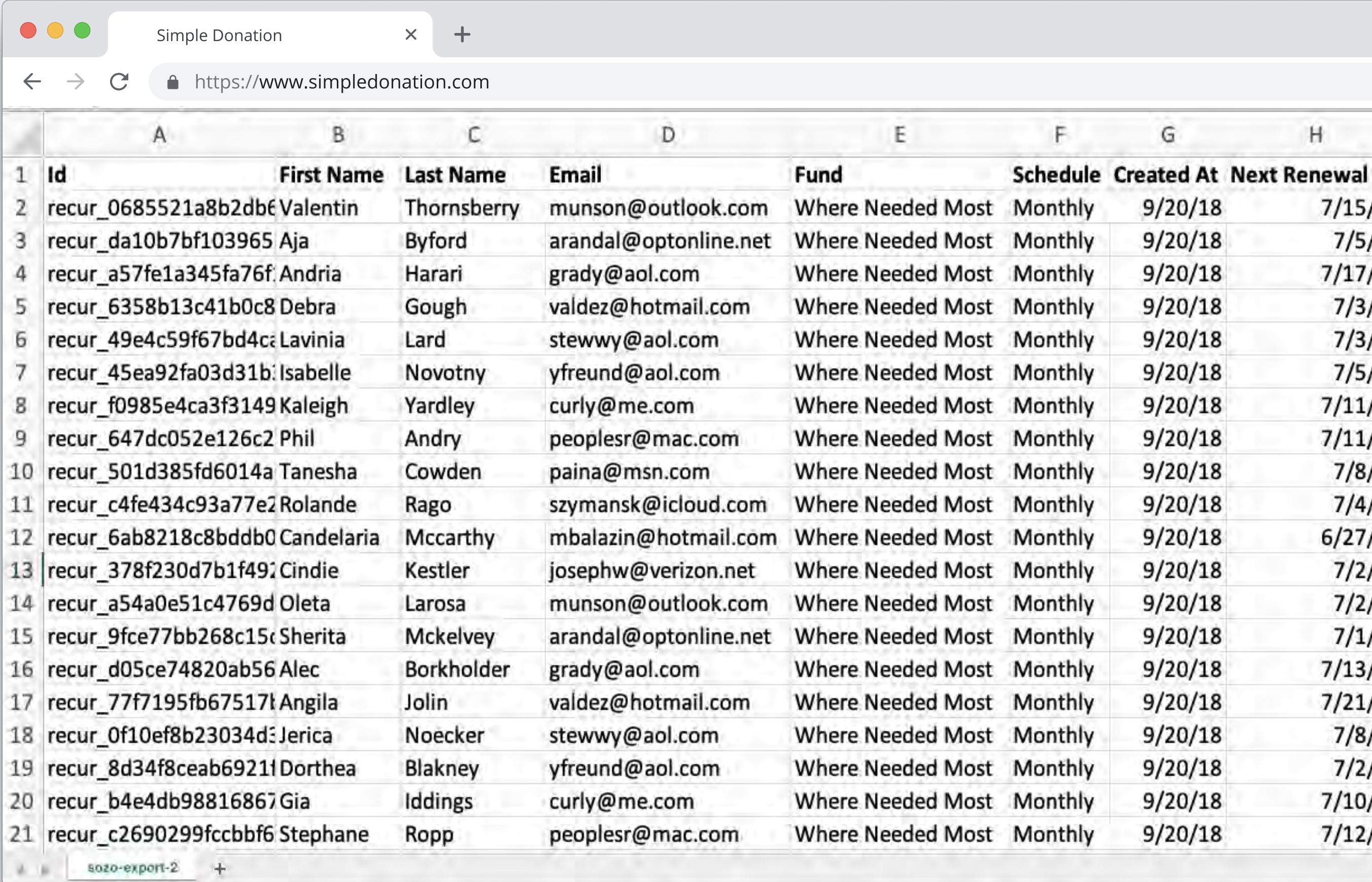
It's good to be transparent with you congregation, and since this process is a bit more involved we recommend getting in front of the situation by beginning to communicate to your congregation early and often.

Don't worry, we're here and we'll help you along the way.



Step 1

Download recurring transactions from current provider

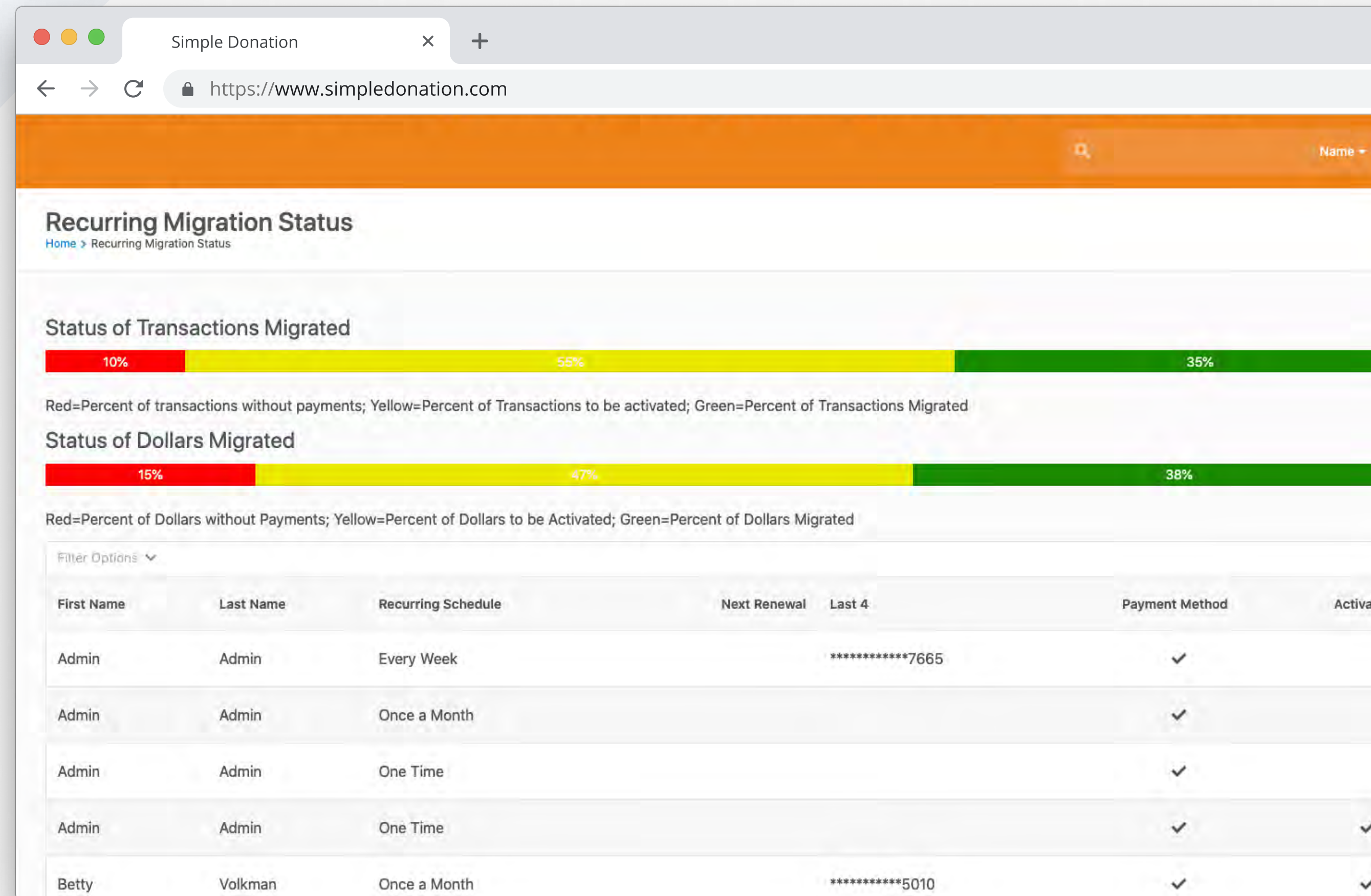


The screenshot shows a web browser window with the title 'Simple Donation' and the URL 'https://www.simpledonation.com'. Below the browser window, a CSV file named 'sozo-export-2' is open, displaying a table of recurring transactions. The table has 8 columns: Id, First Name, Last Name, Email, Fund, Schedule, Created At, and Next Renewal. The data is organized into 21 rows, each representing a recurring transaction. The 'Fund' column for all transactions is 'Where Needed Most', and the 'Schedule' is 'Monthly'. The 'Created At' date for all transactions is '9/20/18'. The 'Next Renewal' dates vary, ranging from '7/15/19' to '7/12/20'.

| | A | B | C | D | E | F | G | H |
|----|-----------------------|------------|-------------|-----------------------|-------------------|----------|------------|--------------|
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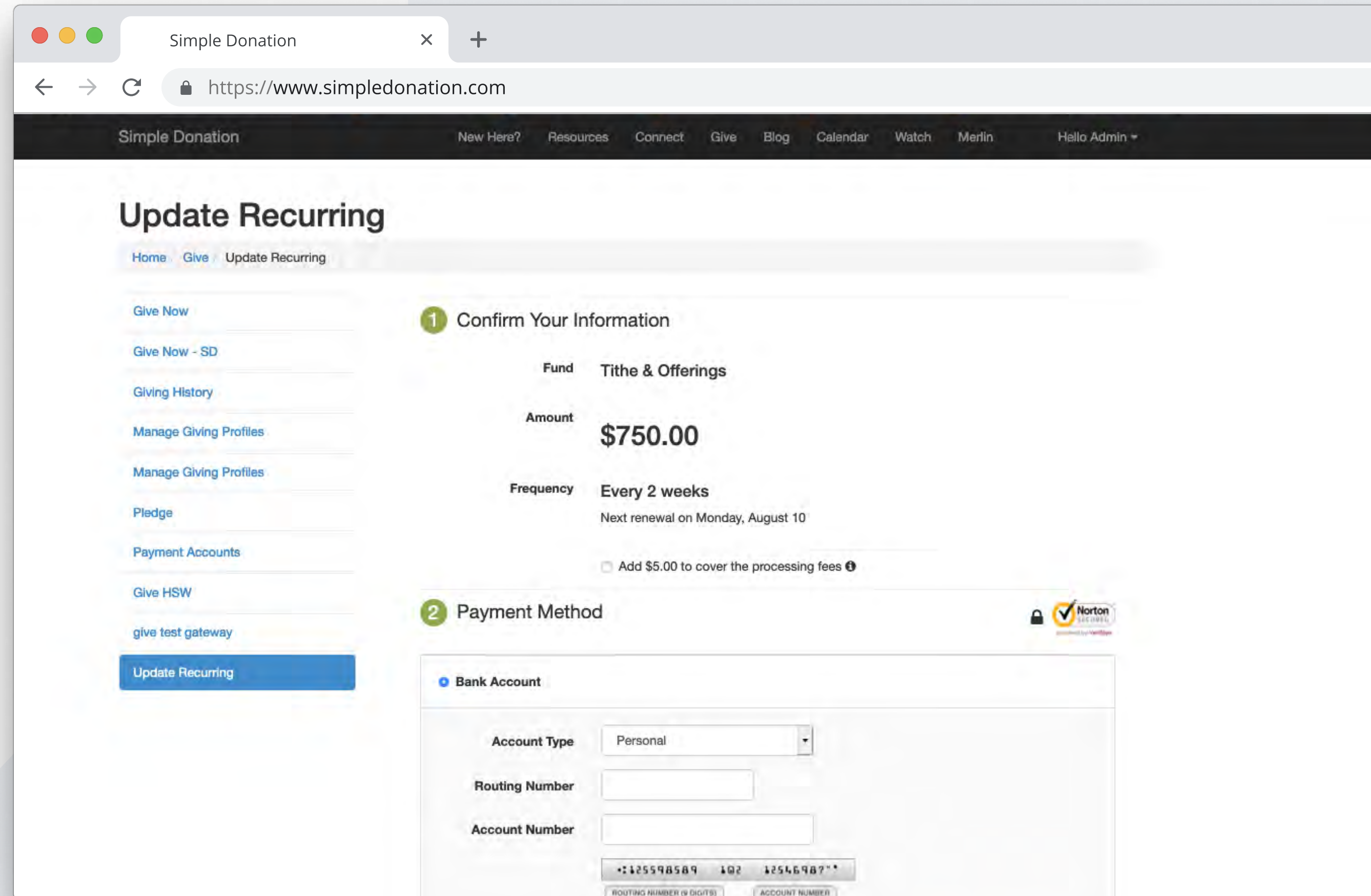
Step 2

Simple Donation will import those into Rock - marked inactive and without payment methods



Step 3

Simple Donation will create 2 pages in Rock - one that lists status of imported scheduled transactions (progress bar and a list showing whether they're active or not and whether payment info has been added) & one that has a place for people to view their scheduled transaction and add their payment info.



The screenshot shows a web browser window with the URL <https://www.simpledonation.com>. The page title is "Simple Donation". The navigation bar includes links for "New Here?", "Resources", "Connect", "Give", "Blog", "Calendar", "Watch", "Merlin", and "Hello Admin".

Update Recurring

Home Give Update Recurring

- Give Now
- Give Now - SD
- Giving History
- Manage Giving Profiles
- Manage Giving Profiles
- Pledge
- Payment Accounts
- Give HSW
- give test gateway
- Update Recurring

1 Confirm Your Information

Fund Tithe & Offerings

Amount **\$750.00**

Frequency **Every 2 weeks**
Next renewal on Monday, August 10

☐ Add \$5.00 to cover the processing fees ⓘ

2 Payment Method

Bank Account

Account Type Personal

Routing Number

Account Number

•125598589 102 12546987•

ROUTING NUMBER (9 DIGITS) ACCOUNT NUMBER

Step 4

Simple Donation will put a system communication in Rock that will have a tokenized link which will take donor to a page that has their scheduled transaction and a place to add their payment info. (communication is editable and church can set up workflows for follow up)

The screenshot shows a web browser window with the address bar displaying 'Simple Donation' and the URL 'https://www.simpledonation.com'. The page title is 'Migration Email'. Below the title, there is a breadcrumb trail: 'Home > Communications > System Emails (Legacy) > Migration Email'. A yellow warning banner states: 'All of Rock's core 'system emails' should now be managed using the System Communications page. This page is still available for you to manage any plugin created system emails. Once plugin developers have updated their code to use System Communications (and after you update the plugin) you will also manage any of those system emails using the System Communications page.' The main section is titled 'Edit System Email'. It contains several form fields: 'Title' (Migration Email), 'Category' (Finance), 'From Name', 'From Address', 'To', 'Cc', and 'Bcc'. The 'Subject' field is populated with 'Updating Your Recurring Gift to {{ 'Global' | Attribute:'OrganizationName' }}'. The 'Message Body' field contains HTML code for an email template, including a header, a paragraph about the new giving platform, a disclaimer about credit card information, and a button to update the recurring gift.

Simple Donation

https://www.simpledonation.com

Migration Email

Home > Communications > System Emails (Legacy) > Migration Email

All of Rock's core 'system emails' should now be managed using the System Communications page. This page is still available for you to manage any plugin created system emails. Once plugin developers have updated their code to use System Communications (and after you update the plugin) you will also manage any of those system emails using the System Communications page.

Edit System Email

Title *
Migration Email

Category *
Finance

From Name

From Address

To

Cc

Bcc

Subject *
Updating Your Recurring Gift to {{ 'Global' | Attribute:'OrganizationName' }}

Message Body *

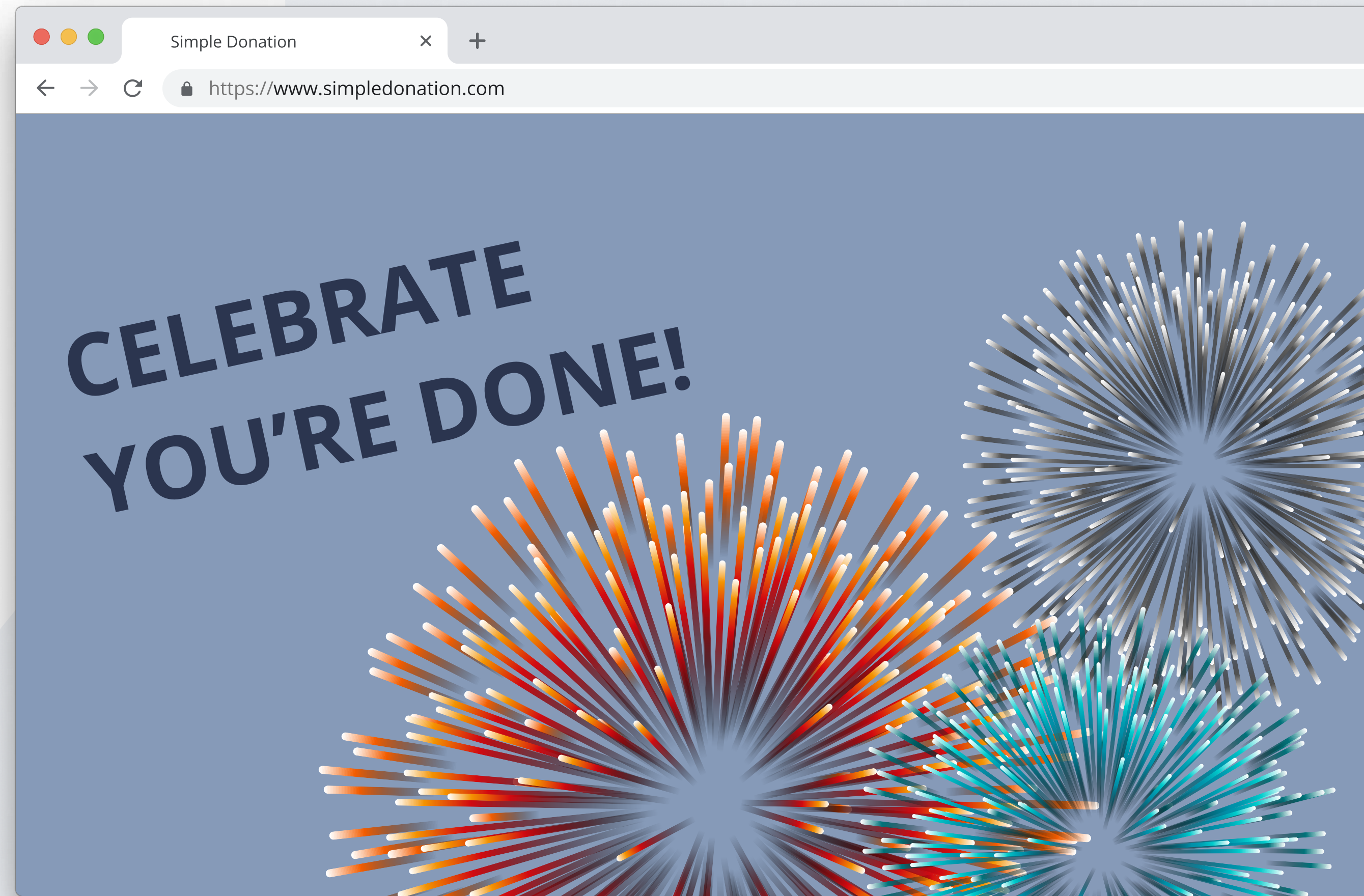
```

{{ 'Global' | Attribute:'EmailHeader' }}
<p>
  {{ 'Global' | Attribute:'OrganizationName' }} has partnered with a new online giving platform. This new platform will be simple, secure and will fully integrate with our new system. Since you already
  have an active recurring gift set up with Pushpay, we wanted to send you this email to ask you to update your gift in this new system. By clicking the link below and adding your payment information your existing recurring gift amount and schedule will be retained and it
  will now be processed by our new giving platform.
</p>
<p>
  As before, we do not store any credit card information on our servers. Your payment information is encrypted with the same technology most use. If you have any questions, please email us or call us.
</p>
<table border="0" cellpadding="0" cellspacing="0" class="btn btn-primary" style="border-collapse: separate; mso-table-lspace: 0pt; mso-table-rspace: 0pt; width: 100%; box-sizing: border-box; min-width: 100%; width: 100%;>
  <tbody>
    <tr>
      <td align="center" style="font-family: sans-serif; font-size: 14px; vertical-align: top; padding-bottom: 15px;" valign="top">
        <table border="0" cellpadding="0" cellspacing="0" style="border-collapse: separate; mso-table-lspace: 0pt; mso-table-rspace: 0pt; width: auto;>
          <tbody>
            <tr>
              <td style="font-family: sans-serif; font-size: 14px; vertical-align: top; background-color: #862633; border-radius: 5px; text-align: center;" valign="top" bgcolor="#862633" align="center"><a href="{{ 'Global' | Attribute:'PublicApplicationRoot' }}" update
                recurring?token={{ token }}" target="_blank" style="display: inline-block; color: #ffffff; background-color: #862633; border: solid 2px #862633; border-radius: 5px; box-sizing: border-box; cursor: pointer; text-decoration: none; font-size: 14px; font
                -weight: bold; margin: 0; padding: 12px 25px; text-transform: capitalize; border-color: #862633;">Update Recurring Gift</a></td>
            </tr>
          </tbody>
        </table>
      </td>
    </tr>
  </tbody>
</table>

```

Step 5

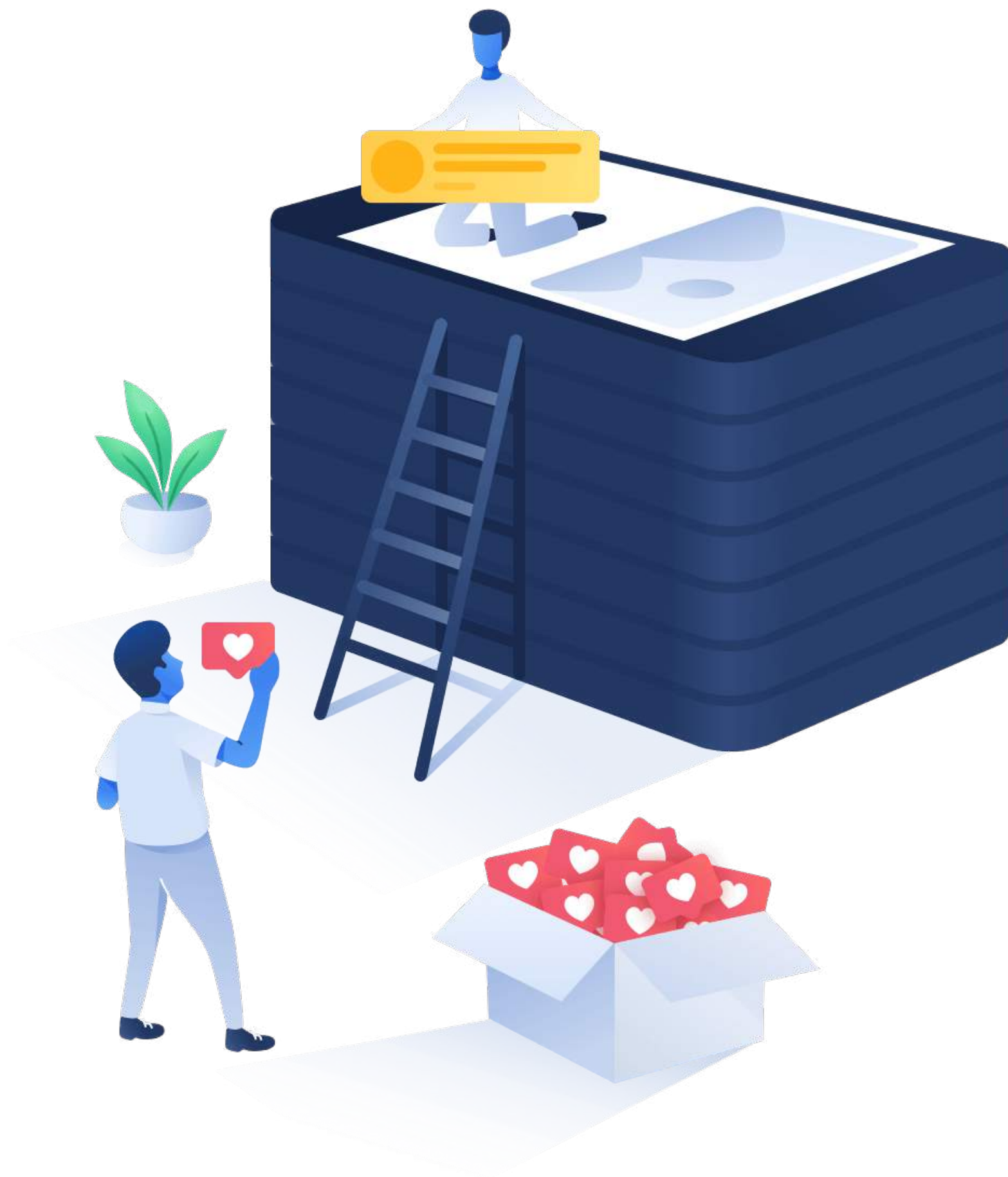
Church staff will receive notice when payment methods are added and will then deactivate the recurring gift in current provider and activate in Rock. Upon activation in Rock, Simple Donation will begin processing those transactions.





I did not want to transition giving providers, there is just so much risk that you will lose recurring gifts. And to make matters worse, we were doing this in the middle of a pandemic. However, we implemented Rock this year and Simple Donation's integration with Rock is incredible and their process for migrating is well designed. The process has the analytics and reports built right into Rock and allowed me to very simply communicate with a lot of donors in very personal terms. Through this process, we've also been able to significantly reduce our cost. On top of that the relationship we have with Simple Donation is unlike with any other vendor we use. The care and concern they serve us with makes us feel as if they're on our staff. If you use Rock, I don't see how you can find a better provider than Simple Donation.

Blake Bastin | Director of Finance and Administration |
Crossings Community Church



We're Here Make Things Simpler For You

We know that managing finances has plenty of complexity. We're ready to partner with you to make things simple. Email info@simplifiedonation.com for more information.