Text-to-Donate Checklist

Setting up a new text-to-donate campaign with Qgiv? Use this checklist to help make your campaign a success!

Add New Text Campaign: Be sure to configure these settings for your new campaign.

- Choose your **Keyword** based on event, campaign, or acronym
  - ❑ Look for **something unique** to your organization that's easy for donors to use.
  - ❑ When choosing keywords, **autocorrect is not your friend**! Avoid using spaces, combining a series of words, or adding special characters.
- Start & End Dates?
  - ❑ **Not recommended** if you have the Text Fundraising package **indefinitely**.
  - ❑ If you're using text for a **limited time**, be sure to **add an end date**.
- Require an amount?
  - ❑ If you want to capture **pledges** using a thermometer, you'll want to require an amount.
  - ❑ If you prefer donors to **choose from amounts** on your donation form, toggle off.
- Inactive Campaign Message
  - ❑ **Update the default wording**.
  - ❑ If using text for limited time, be sure to update this message to **direct to your website.**
- Complete Your Gift Message
  - ❑ Be sure to **update the default wording**! This is the message donors receive when texting your keyword.
- After Donation Message
  - ❑ Be sure to **update the default wording**! This is your thank-you message.
  - ❑ Maybe **direct to your website** or remind them **what their donation is helping you accomplish**.
- Reminder Messages
  - ❑ Three by default – You can **add or remove**, but three is a good number.
  - ❑ **Update the wording** so it's not a canned message.
  - ❑ **Stagger** reminders based on your event date.
  - ❑ Include **"Final Reminder"** on the last one so donors don't assume you'll remind them again and ignore it.

System Fields: Make sure you display the fields you need and hide the ones you don't.

- ❑ Remove any **unnecessary fields** to make the donation quick and simple.
- ❑ Remember, if it's an event, you have their info! **Only capture what you need** (keep integration matching logic in mind).

Mobile Reports: Get the data that matters!

- ❑ The **Text-To-Donate Report** includes all pledged and received text-to-donate gifts.
- ❑ Use this report to **follow pledges** and reach out if you need to.
- ❑ You can **turn off individual reminders** from this report, if requested.