



# Cash/Check Donor Communications

Version 1.0



# Communicating to Cash and Check Donors

## Overview

The goal of this configuration guide is to help churches connect with those in your congregation who traditionally give by cash or check. This tool uses a few of Rock's features to reach out to those donors and provide ways they can give while your church is not having traditional services or office hours. Although in person services may not be scheduled right now, ministry work still avoiding interruption in your regular donors' contributions is critical.

## Solution

Before diving into the details, let's take a look at our goals for this communication point with our cash and check donors. We want to provide our non-digital donors with an email featuring two options:

1. Request a self-addressed, stamped envelope so they can mail a check donation back to you.
2. Request a phone call from someone who can walk them through the process to set up online giving for the first time.

Alternatively, if you have cash or check donors who do not have an email address, we'll also show you how to identify them so a staff member can give them a call and walk them through their giving choices.

This sounds pretty simple, and it allows for options that should meet the needs of all your cash/check donors. Now that you understand the strategy, let's dig into the details.

# Configuration Steps

## Set Up Connector Group

Before you set up your new connection type, you need to create your connector group. Remember, the individuals in this group will be helping your attendees with online giving.

Under 'Groups > Global Connector Group', create the Connection Group for this connection type.

The screenshot shows the 'Group Viewer' interface. On the left is a navigation sidebar with a search bar and a list of groups: 'Global Connector Group', 'Giving: Online or Mail' (highlighted), 'Section A', 'Section B', 'Serving Teams', 'Ushers', and 'General Groups'. The main area displays the configuration for the 'Giving: Online or Mail' group. At the top, there are tabs for 'Private', 'General Group', and 'Main Campus'. The 'Name' field contains 'Giving: Online or Mail' and is marked as 'Active'. The 'Description' field contains 'Connection group for the Giving: Online or Mail connection type.'. Below this is a 'General' section with fields for 'Group Type' (General Group), 'Security Role' (Yes), 'Campus' (Main Campus), 'Parent Group' (Global Connector Gr...), and 'Require Signed Document'. At the bottom, there is a 'Meeting Details' section and 'Save' and 'Cancel' buttons.

## Create New Connection Type and Opportunities

Configuring Your New Connection Type

If you are new to creating connection types, or need some extra assistance, check out our [Engagement](#) guide.

Start by creating a connection type for those who are either needing assistance setting up online giving, or who are requesting a self-addressed stamped envelope. The following is the basic setup:



Search



## Connection Type Detail

Home > Connections > Connection Types > Giving: Online or Mail

### Giving: Online or Mail

Name **1**

Giving: Online or Mail

Active

Yes

Description **2**

Persons who have traditionally given on-site by cash or check who are requesting assistance to set up online giving or receive a self-addressed stamped envelope to mail in contributions.

Icon Css Class

fa fa-money

Enable Future Follow-up **4**

Days Until Request Considered Idle **3**

14

Enable Full Activity List **5**

Requires Placement Group To Connect **6**

Activities **7**

Activities

Called left voice message



Called no answer



Called requested future follow up



Mailed Self-Addressed Stamped Envelope



Statuses **8**

Name

Description

In progress

These are persons who have been called an a voice mail was left or there was no answer.



No contact

These persons have not been called yet.



Workflows **9**

Save

Cancel

1. **Name:** Giving: Online or Mail
2. **Description:** People who have traditionally given on-site by cash or check who are requesting assistance to set up online giving or receive a self-addressed stamped envelope to mail in contributions.
3. **Days Until Request Considered Idle:** You can set this for your own internal preference.
4. **Enable Future Follow-up:** You may want to enable this feature for this request. This would be used for those who don't have all the necessary information available when first contacted, or those who are being sent a self-addressed stamped envelope. Your team could then call them at a future point in time when the giver is ready for online giving setup or send another envelope when needed.
5. **Enable Full Activity List:** For this connection type, this is not necessary.
6. **Requires Placement Group to Connect:** Since the goal of this connection type is to simply set up an online giving account or send an envelope, subsequent placement in a specific group is not necessary.
7. **Activities:** This connection opportunity requires a conversation to assist those needing to set up online giving or the mailing of a self-addressed stamped envelope. Use activities:
  - Mailed giving envelope
  - Called left voice message
  - Called no answer
  - Called requested future follow up

Since a successful phone conversation would result in a completed connection, the activity of "called" would not fit with this connection type.

8. **Statuses:** Create two statuses: "In progress" and "No contact"
9. **Workflows:** Workflows are optional, but not a necessary component of this connection type.

#### Setting Up Your Connection Opportunities

Now that you have your connection type set up, you'll need to configure three connection opportunities for your cash and check donors.

#### Set Up Online Giving

The first connection opportunity will be for those who need to be connected to someone from your team for assistance setting up their online giving.

Home > Connections > Connection Types > Giving: Online or Mail > Set Up Online Giving

## Connection Opportunity Detail

Set Up Online Giving
Active

---

**1** Name \*

Active

**Summary** ⓘ

This will connect you to persons on our team who can help you set up online giving.

**Details** ⓘ

With churches temporarily closed, this opportunity gives your staff a way to help those who give by cash and check to set up online giving.

**2** Public Name \*

Icon CSS Class

**3** Campuses

Main Campus
  Active Campus
  Inactive Campus

Photo

Upload

Placement Groups

**4** Connector Groups

Group	Campus	Main Campus Default Connector
Giving: Online or Mail	Main Campus	Alisha Marble
+		

Workflows

Save
Cancel

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1. **Name and Details:** Name the opportunity and provide a description in the Summary.
2. **Public Name:** It is good to provide a name, even if your opportunity is not public.

3. **Icon and Campuses:** You can also choose an icon, and select which campuses this opportunity is for.
4. **Connector Groups:** Choose the connector group you created earlier here. When setting up your Connection Opportunities, don't forget to choose a default connector. This will ensure that all persons filling out the connection opportunity begin by being assigned to one person. This person can then reassign to others in the group, if necessary.

### **Self-Addressed Stamped Envelope**

The second connection opportunity will be for those who need a self-addressed stamped envelope sent to them for giving. You can see the setup below:



Home > Connections > Connection Types > Giving: Online or Mail > Self-Addressed Stamped Envelope

## Connection Opportunity Detail

Self-Addressed Stamped Envelope Active

Name \*  Active

Summary ?

*This will request a self-addressed stamped envelope to be sent so you can mail your contribution directly to the church.*

Details ?

*Persons who select this opportunity type will be sent a self-addressed stamped envelope to their mailing address on file to be able to mail contributions to the church when unable to attend.*

Public Name \*  Icon CSS Class

Photo  Campuses  Main Campus  Active Campus  Inactive Campus

Placement Groups ▼

Connector Groups ▲

Group	Campus	Main Campus Default Connector
Giving: Online or Mail	Main Campus	Ted Decker

Workflows ▼

Save Cancel

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### No Email Address

The third opportunity will be for those who you could not connect with by email. Individuals in this connection opportunity will need to be contacted by someone on your team who can explain to them the different giving options for those who traditionally give by cash or check. They can then assist them with setting up online giving or place them in the opportunity to receive a self-addressed stamped envelope. This can also be set for future follow up if no connection is made on the first attempt.

Connection Opportunity Detail

Home > Connections > Connection Types > Giving: Online or Mail > Givers without Email

### Givers without Email Active

Name \*  Active

Summary i

**Summary**

This connection opportunity is for those who give by cash or check and do not have a valid email on file.

**Details**

If you are someone who gives by cash or check did not receive the instructional email because your email is not listed or invalid, this connection will alert our team to contact you by phone number.

Public Name \*

Icon CSS Class

Photo

Campuses  Main Campus  Active Campus  Inactive Campus

Placement Groups ▼

Connector Groups ▲


Group	Campus	
Giving: Online or Mail	Main Campus	<input type="text"/> <input type="text"/>

Main Campus Default Connector

Workflows ▼

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At this point, your connection type and opportunities are set up and should look similar to the example pictured below. Now you're ready to engage your analog givers.



Search 

## Connection Type Detail




[Home](#) > [Connections](#) > [Connection Types](#) > [Giving: Online or Mail](#)







**Giving: Online or Mail**




Persons who have traditionally given on-site by cash or check who are requesting assistance to set up online giving or receive a self-addressed stamped envelope to mail in contributions.

[Edit](#) [Delete](#)  


**Connection Opportunities**






Filter Options   

Name	Summary	Status
Givers without Email	This connection opportunity is for those who give by cash or check and do not have a valid email on file.	<a href="#">Active</a>  
Self-Addressed Stamped Envelope	This will request a self-addressed stamped envelope to be sent so you can mail your contribution directly to the church.	<a href="#">Active</a>  
Set Up Online Giving	This will connect you to persons on our team who can help you set up online giving.	<a href="#">Active</a>  


50 500 5,000 3 Connection Opportunities   

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Campus All 




**My Connection Requests**     [All Types](#) [Active Types](#) [All Requests](#) [My Requests](#) [Total Requests: 5](#) 


**Involvement**



Children's




1


  



Greeter




2




Usher

2


  

**Giving: Online or Mail**




Givers without Email

0



Self-Addressed Stamped Envelope

0




Set Up Online Giving

0

## Create a Workflow to Place Givers/Donors in the Connection Type

Next, it's time to create a workflow called "Give: Online or Mail." The workflow will have up to nine attributes and two activities, each with several actions.

 Giving: Online or Mail Id: 30

This is a form entry workflow for those who normally give by cash and check to be able to sign up for alternate ways to give and be placed in the Giving: Online or Mail connection request.

**Activities (2)** ▾

**1. Start**

Actions:






1. Entry Form (Form)
2. Match/Add to Database (Person Attribute From Fields)
3. Update Mailing Address (Person Address Update)
4. Update Mobile Number (Person Phone Update)
5. Activate Activity (Activate Activity)

**2. Add to Connection Opportunity**

Actions:

1. Add to Online Giving (Connection Request Create)
2. Envelope Request (Connection Request Create)
3. Save (Workflow Persist)

[Edit](#) [Delete](#)

## Workflow Attributes

Since this will be a form for persons to fill out, we will need to have person fields in addition to your connections type filer. This form can be filled out by current persons in your database, or it will create a database record for new givers.

Attributes Count: 9				
Attribute	Description	Key	Field Type	Required
☰ First Name	1	FirstName	Text	
☰ Last Name	2	LastName	Text	
☰ Mobile Phone Number	3	MobilePhoneNumber	Phone Number	
☰ Address	4	Address	Address	
☰ Email	5	Email	Email	
☰ Requestor	6	Requestor	Person	
☰ How can we help you?	7	Howcanwehelpyou	Single-Select	
☰ Online Giving	8	OnlineGiving	Connection Opportunity	
☰ Envelope	9	Envelope	Connection Opportunity	

1. **First Name:** Allows for entry of the person's first name (field type: Text).
2. **Last Name:** Allows for entry of the last name (field type: Text).
3. **Mobile Phone Number:** Used to collect the person's phone number (field type: Phone Number).
4. **Address:** This attribute contains all of the areas needed to provide a full address (field type: Address).
5. **Email:** Only email addresses can be entered into this field (field type: Email).
6. **Requestor:** The person filling out the form will be converted to this attribute for the remainder of the workflow (field type: Person).
7. **How can we help you?:** This is where you'll ask what kind of help is needed (field type: Single Select). This will determine which connection opportunity the requestor should be placed in. Here is how to set this up:

## Workflow Attributes Id: 7664



Edit attribute for workflows of workflow type Giving: Online or Mail

Name \*

Active ⓘ

 Yes

Abbreviated Name

Public ⓘ

 Yes

Description

Categories

Field Type

Single-Select

Key \*

Values ⓘ

Required

 Require a value

Show in Grid ⓘ

 Yes

Control Type ⓘ

Show on Bulk ⓘ

 Yes

Columns ⓘ

Default Value

 None I would like to set up online giving I would like to be sent a self-addressed stamped envelope so I can mail my gift

Advanced Settings

Save

Save Then Add

Cancel

### Tip

As you create selections in Rock, whether for single selects or multi selects, it's always a good idea to use the key/value pair (1^, 2^, etc). Doing so will let you change the text in the value, without losing information stored on previous entries.

- 8. Online Giving:** See #9 below.
- 9. Envelope:** The "Online Giving" and "Envelope" attributes are where you'll ask what kind of help is needed. These two attributes (field type: Connection Opportunity) will determine which connection opportunity the requestor should be placed in. Pictured below are examples of how these are set up:

**Workflow Attributes** id: 7669 ✕

Edit attribute for workflows of workflow type Giving: Online or Mail

<p><b>Name</b> *</p> <input style="width: 90%;" type="text" value="Online Giving"/>	<p><b>Active</b> ⓘ</p> <input checked="" type="checkbox"/> Yes
<p><b>Abbreviated Name</b></p> <input style="width: 90%;" type="text" value="Online Giving"/>	<p><b>Public</b> ⓘ</p> <input type="checkbox"/> Yes
<p><b>Description</b></p> <div style="border: 1px solid #ccc; height: 40px;"></div>	
<p><b>Categories</b></p> <div style="border: 1px solid #ccc; padding: 2px;"> <span style="font-size: 0.8em;">📁</span> </div>	<p><b>Field Type</b></p> <p>Connection Opportunity</p>
<p><b>Key</b> *</p> <input style="width: 90%;" type="text" value="OnlineGiving"/>	<p><b>Include Inactive</b> ⓘ</p> <input type="checkbox"/> Yes
<p><b>Required</b></p> <input type="checkbox"/> Require a value	<p><b>Connection Type</b> ⓘ</p> <div style="border: 1px solid #ccc; padding: 2px;">             Giving: Online or Mail           </div>
<p><b>Show on Bulk</b> ⓘ</p> <input type="checkbox"/> Yes	<p><b>Default Value</b></p> <div style="border: 1px solid #ccc; padding: 2px;">             Set Up Online Giving           </div>
<p><b>Advanced Settings</b> <span style="float: right;">▼</span></p>	

Save
Save Then Add
Cancel

**Workflow Attributes** id: 7680 ✕

Edit attribute for workflows of workflow type Giving: Online or Mail

<p><b>Name</b> *</p> <input style="width: 90%;" type="text" value="Envelope"/>	<p><b>Active</b> ⓘ</p> <input checked="" type="checkbox"/> Yes
<p><b>Abbreviated Name</b></p> <input style="width: 90%;" type="text" value="Envelope"/>	<p><b>Public</b> ⓘ</p> <input type="checkbox"/> Yes
<p><b>Description</b></p> <div style="border: 1px solid #ccc; height: 40px;"></div>	
<p><b>Categories</b></p> <div style="border: 1px solid #ccc; padding: 2px;"> <span style="font-size: 0.8em;">📁</span> </div>	<p><b>Field Type</b></p> <p>Connection Opportunity</p>
<p><b>Key</b> *</p> <input style="width: 90%;" type="text" value="Envelope"/>	<p><b>Include Inactive</b> ⓘ</p> <input type="checkbox"/> Yes
<p><b>Required</b></p> <input type="checkbox"/> Require a value	<p><b>Connection Type</b> ⓘ</p> <div style="border: 1px solid #ccc; padding: 2px;">             Giving: Online or Mail           </div>
<p><b>Show on Bulk</b> ⓘ</p> <input type="checkbox"/> Yes	<p><b>Default Value</b></p> <div style="border: 1px solid #ccc; padding: 2px;">             Self-Addressed Stamped Envelope           </div>
<p><b>Advanced Settings</b> <span style="float: right;">▼</span></p>	

Save
Save Then Add
Cancel

## **Workflow Actions**

There are two workflow actions you will need to create: "Start" and "Add to Connection Opportunity".

### **Start Activity**

This is simply the starting point where we collect the information from our entry form. In this activity, the person is either matched to an existing person in Rock, or a new record is created. This can be completed with five actions:

1. Entry Form
2. Match/Add to Database
3. Update Mailing Address
4. Update Mobile Phone Number
5. Activate Activity



Start Id: 82

Name  Active  Activated with Workflow

Description

Attributes ▼

Actions [+ Add Action](#)

- Entry Form ⌵ ≡ ▼
- Match/Add to Database ⌵ ≡ ▼
- Update Mailing Address ⌵ ≡ ▼
- Update Mobile Number ⌵ ≡ ▼
- Activate Activity ⌵ ≡ ▼

Here are the details of those actions:

Actions

+ Add Action

Entry Form Filter Menu Close

Name   Action is Completed on Success  Activity is Completed on Success

Action Type: Form 'User Entry Form' Overview  
Prompts user for attribute values

Notification Email: Workflow Form Notification  Include Actions in Email: Yes

Enable Note Entry:  Yes

Form Header

Field	Visible	Editable	Required	Hide Label	Pre-HTML	Post-HTML
First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mobile Phone Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How can we help you?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Requestor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Online Giving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Envelope	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Form Footer

Command Label:  Button Type: Primary Activate Activity:  Response Text:

Command Selected Attribute:

This is the form that will be filled out by the person requesting assistance. Records match by First Name, Last Name, and Mobile Number or Email. Make sure that either the mobile phone number or email is required.

**Match/Add to Database**

Name •  
Match/Add to Database  Action is Completed on Success  
 Activity is Completed on Success

Action Type: Person Attribute Fro...  
'Get Person From Fields' Overview  
Sets an attribute to a person that matches based on any given name, email, mobile number, and birth date. If match is not found a new person will be created. Note: If a match is found, it does NOT update the person record with any of the supplied values except the email address if enabled by the action setting (the others are only used to find a match).

First Name <span style="color:blue">i</span>	or	Attribute Value
<input type="text"/>		<input type="text"/>
Last Name <span style="color:blue">i</span>	or	Attribute Value
<input type="text"/>		<input type="text"/>
Email Address <span style="color:blue">i</span>	or	Attribute Value
<input type="text"/>		<input type="text"/>
Mobile Number <span style="color:blue">i</span>	or	Attribute Value
<input type="text"/>		<input type="text"/>
Birth Day <span style="color:blue">i</span>	or	Attribute Value
<input type="text"/>		<input type="text"/>
Birth Month <span style="color:blue">i</span>	or	Attribute Value
<input type="text"/>		<input type="text"/>
Birth Year <span style="color:blue">i</span>	or	Attribute Value
<input type="text"/>		<input type="text"/>

Person Attribute i •  
Requestor

Default Record Status i  
Pending

Default Connection Status i  
Web Prospect

Default Campus i

Update Email? i  
Yes

This step will match the request to an existing database record or add a new one if it cannot be matched. This action can update the email of the requestor but does not update any other information. Since you are having to contact the requestor, or send an envelope, you may want to add the following actions which will update their database record.

Update Mailing Address

Name <sup>•</sup>  
Update Mailing Address  Action is Completed on Success  
 Activity is Completed on Success

Action Type  
Person Address Upd... 'Person Address Update' Overview  
Updates an address for a person's family.

Person <sup>i</sup> <sup>•</sup>  
Requestor

Location Type (From Attribute) <sup>i</sup>

Location Type <sup>i</sup> <sup>•</sup>  
Home

Location  
📍

Location (From Attribute) <sup>i</sup>  
Address

Is Mailing Location <sup>i</sup> or Attribute Value  
Address

Is Mapped Location <sup>i</sup> or Attribute Value

Save Current Address as Previous Address <sup>i</sup>  
Yes

This will update the mailing address of the requestor on their database record.

**Update Mobile Number**

Name •  
  Action is Completed on Success  
 Activity is Completed on Success

Action Type 'Person Phone Update' Overview  
Updates the phone number of a person.

Person i •

Phone Type (From Attribute) i

Phone Type i •

Phone Number i or Attribute Value

Unlisted i or Attribute Value

Messaging Enabled i or Attribute Value

Ignore Blank Values i

This will update the mobile phone number of the requestor's database record.

**Activate Activity**

Name •  
  Action is Completed on Success  
 Activity is Completed on Success

Action Type 'Activate Activity' Overview  
Activates a new activity instance and all of its actions.

Activity i •





Now that this activity is complete, add the Activate Activity workflow control action.


### **Add to Connection Opportunity Activity**

In this activity, the requestor will be placed in the appropriate connection opportunity. This activity has two actions:


1. Add to Online Giving


## 2. Envelope Request
















 Add to Connection Opportunity Id: 86   

**Name** \*  Active  Activated with Workflow 

**Description**

Attributes 

**Actions** 

 Add to Online Giving	   
 Envelope Request	   
 Save	   

Pictured below are the details of those actions:

Add to Online Giving

Run If ? How can we help you? Regular Expression Text Value 1 or Attribute Value

Name \*  
  Action is Completed on Success  
 Activity is Completed on Success

Action Type 'Create Connection Request' Overview  
Creates a new connection request.

Person Attribute ? Requestor

Connection Opportunity Attribute ? Online Giving

Connection Status Attribute ?

Connection Status ? No contact

Campus Attribute ?

Connection Comment Attribute ?

Connection Request Attribute ?

Here, we are using the “Connection Request Create” action. You will need to select the filter to only place those who are requesting online giving help into this connection opportunity. You’ll do the same with the next filter to place those requesting an envelope in the correct connection opportunity.

Envelope Request

⏏
☰
^
✖

Run If ?
Text Value
Attribute Value

How can we help you? ▾

Regular Expression ▾

2

or

▾

**Name** \*

Envelope Request

Action is Completed on Success  
 Activity is Completed on Success

**Action Type**

■ Connection Request... ▾

'Create Connection Request' Overview

Creates a new connection request.

**Person Attribute** ? \*

Requestor ▾

**Connection Opportunity Attribute** ? \*

Envelope ▾

**Connection Status Attribute** ?

▾

**Connection Status** ?

No Contact ▾

**Campus Attribute** ?

▾

**Connection Comment Attribute** ?

▾

**Connection Request Attribute** ?

▾

Once you have created this part of the workflow, the workflow is complete.

### Tip

After you build the workflow, you will want to test and confirm it's functioning properly. You'll need to save the workflow using the "Workflow Persist" action to view the details and see which activities completed. Once you know the workflow is functioning properly, you can delete the "Save" action.



Save

**Name** \*

Action is Completed on Success
 

Activity is Completed on Success

**Action Type**

Workflow Persist

'Persist Workflow' Overview

Changes an unpersisted workflow be persisted

**Persist Immediately** i

No

## Create an External Page for Form Entry

Now that the workflow is complete, you'll want to create a page on your external website for people to access the workflow's entry form.

### Learn More

If you haven't added a page or blocks before, you can find more information in our [Designing and Building Websites Using Rock](#) guide or check with your website developer.

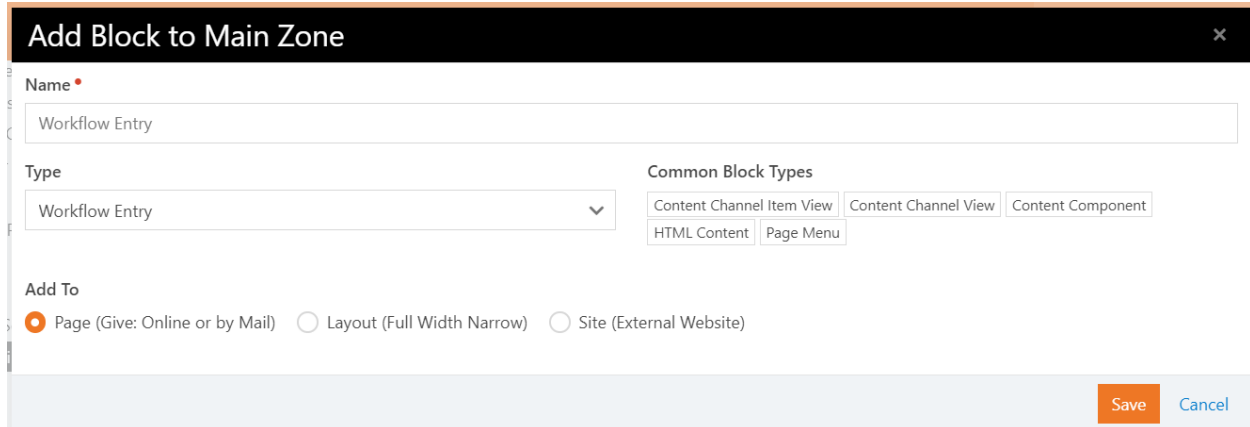
First, create the page. Below is a sample configuration:

Give: Online or by Mail
Site: External Website

<b>Internal Name</b>	<b>Layout</b>
Give: Online or by Mail	Full Width Narrow
<b>Page Title</b>	<b>Url</b>
Give: Online or by Mail	<a href="/page/2615">/page/2615</a>
<b>Browser Title</b>	
Give: Online or by Mail	
<b>Description</b>	
This is a workflow entry for the connection type Give: Online or Mail	

Edit
Delete

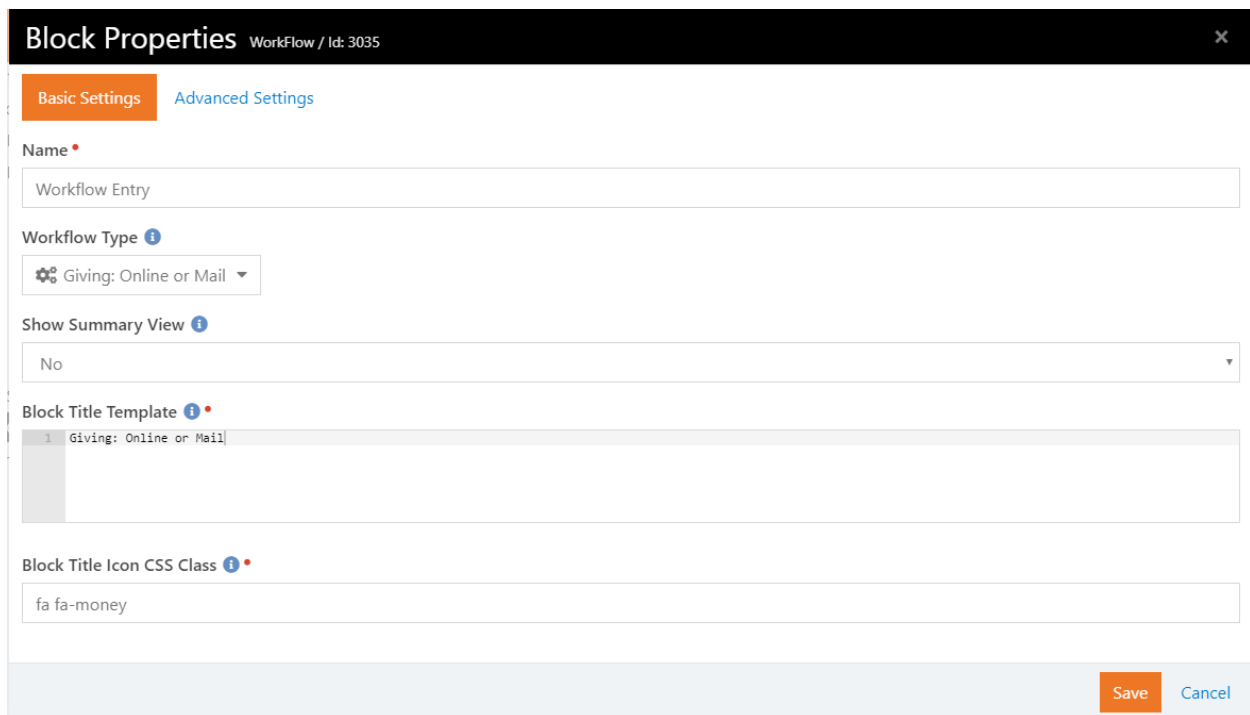
Then, add a block (Type: Workflow Entry) to the Main Zone.



The screenshot shows a dialog box titled "Add Block to Main Zone" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Name:** A text input field containing "Workflow Entry".
- Type:** A dropdown menu with "Workflow Entry" selected.
- Common Block Types:** A grid of buttons including "Content Channel Item View", "Content Channel View", "Content Component", "HTML Content", and "Page Menu".
- Add To:** Three radio button options: "Page (Give: Online or by Mail)" (selected), "Layout (Full Width Narrow)", and "Site (External Website)".
- Buttons:** "Save" (orange) and "Cancel" (blue) buttons at the bottom right.

After you save the block, you will be able to add configuration. Since this is a workflow entry block, open the block settings and choose the Workflow Entry of "Giving: Online or Mail."



The screenshot shows a dialog box titled "Block Properties" with a close button (X) in the top right corner. The dialog has two tabs: "Basic Settings" (selected, orange) and "Advanced Settings" (blue). The "Basic Settings" tab contains the following fields and options:

- Name:** A text input field containing "Workflow Entry".
- Workflow Type:** A dropdown menu with a gear icon and "Giving: Online or Mail" selected.
- Show Summary View:** A dropdown menu with "No" selected.
- Block Title Template:** A list with one item: "1 Giving: Online or Mail".
- Block Title Icon CSS Class:** A text input field containing "fa fa-money".
- Buttons:** "Save" (orange) and "Cancel" (blue) buttons at the bottom right.

After you complete this setup, you'll have an external entry page for the connection type. You can go to the page route and see the form:

# Give: Online or by Mail

[Home](#) / Give: Online or by Mail

**First Name \***

**Last Name \***

**Mobile Phone Number \***

**Email**

**Address \***  
United States

Address

City  AZ  Zip

**How can we help you? \***

I would like to set up online giving

I would like to be sent a self-addressed stamped envelope so I can mail my gift

## Identify Cash and Check Givers and Send Email

To identify those who give by cash and check, use the Giving Analytics tool.

Here is a sample configuration:

Giving Analytics ? 🗑️ 🔄

**Date Range**  
1/1/2016 12:00 AM to 3/30/2020 11:59 PM  
Last   
Years

**Currency Types**  
 Check  Android Pay  
 Cash  Non-Cash  
 Credit Card  Asset  
 ACH  Unknown  
 Apple Pay  Other

**Transaction Source**  
 Website  On-Site  
 Kiosk  Collection  
 Mobile  Bank Checks  
Application  SMS Gift

**Accounts**  
 General Fund  Mission Fund  
 Building Fund

**Filter**  
 All Givers  
 First Time Givers  
 Pattern

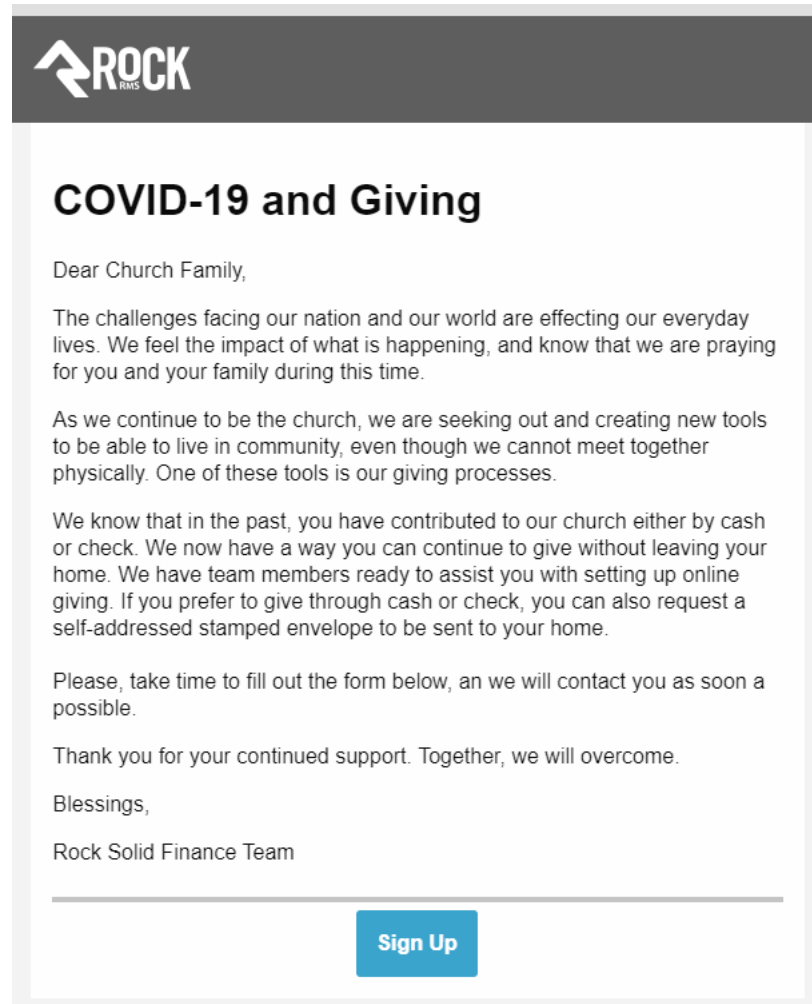
<input type="checkbox"/>	Person	Total	Number of Gifts	Is First Gift	First Gift in Period	First Gift Ever	Last Gift in Period	Last Gift Ever
<input type="checkbox"/>	Decker, Ted	\$9,039.00	29		1/6/2016	1/6/2013	10/6/2018	10/6/2018
<input type="checkbox"/>	Dexter, Frank	\$1,080.00	18		1/6/2016	2/6/2013	9/6/2018	9/6/2018
<input type="checkbox"/>	Lowe, Craig	\$3,465.00	77		1/10/2016	1/5/2014	10/14/2018	10/14/2018
<input type="checkbox"/>	Marble, Bill	\$17,593.00	115		1/3/2016	1/5/2014	10/14/2018	10/14/2018

## Tip

If you want to be more specific with the givers you reach out to, use the Giving Analytics tool along with other components of Rock such as groups and data views to target certain categories of givers.

Once you have identified your cash and check givers, simply choose the communicate button to send them an email about their cash and check giving options.

Here is an example:



The image shows a screenshot of an email template. At the top left is the Rock logo, which consists of a stylized 'R' with an upward-pointing arrow and the word 'ROCK' in a bold, sans-serif font. Below the logo is the title 'COVID-19 and Giving' in a large, bold, black font. The body of the email is written in a clean, sans-serif font and contains several paragraphs of text. At the bottom of the email content is a blue button with the text 'Sign Up' in white. The entire email content is enclosed in a light gray border.

**ROCK**

## COVID-19 and Giving

Dear Church Family,

The challenges facing our nation and our world are effecting our everyday lives. We feel the impact of what is happening, and know that we are praying for you and your family during this time.

As we continue to be the church, we are seeking out and creating new tools to be able to live in community, even though we cannot meet together physically. One of these tools is our giving processes.

We know that in the past, you have contributed to our church either by cash or check. We now have a way you can continue to give without leaving your home. We have team members ready to assist you with setting up online giving. If you prefer to give through cash or check, you can also request a self-addressed stamped envelope to be sent to your home.

Please, take time to fill out the form below, an we will contact you as soon a possible.

Thank you for your continued support. Together, we will overcome.

Blessings,

Rock Solid Finance Team

[Sign Up](#)

Be sure to add a button or link to the workflow entry page you created earlier. When you add this component to your email, the setup will look similar to this:

Button

---

**Button Text**

**Url**

**Background Color**

**Font Color**

**Width**

**Align**

**Font**

**Font Weight**

**Font Size**

**Button Padding**

## Place all with no valid email into connection opportunity

Inevitably, you will have givers who do not have an email listed in the database, or the one listed is invalid. You can see which email messages failed to send, and add these givers directly to the connection opportunity “Givers Without Email.”

## Get Help with Implementation

If this tool sounds like just what your organization is looking for, but you need help with the implementation, don't worry. Sparkability Group is fully trained and ready to help you set up this new service. Connect with our team at [sparkabilitygroup.com](https://sparkabilitygroup.com) to get started.