

Create a Focused Plan



Forms Prioritization

Pull list of active forms from Donations by Forms Report
Unpublish/delete inactive forms

Set-up “Day 1 Form”

Create a form(s) or leverage template to adapt by March 1, 2025

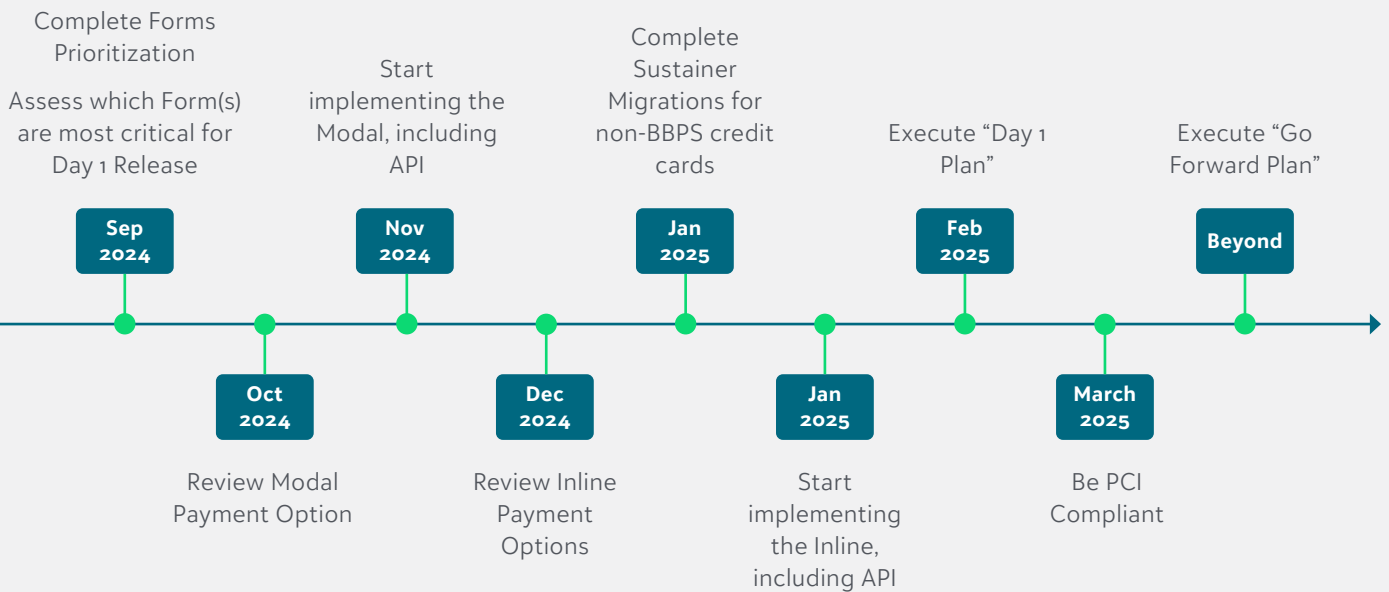
Build “Go Forward Plan”

Map upcoming campaigns to necessary form(s)
Build Priority Schedule to move forms to new Payment Options

****No Changes Required** through Giving Tuesday and End of Year

What to do when A Project Guide

Good news!
Not all forms need to be ready to go on day one!



Existing Payment Options Work

New Payment Options Work