

Week 2 Data Check

Donors, Pledges, Programs & Batches

Work through this worksheet in MinistryPlatform at your own pace, then return to your Week 2 page and enter your answers in the online form. You can type directly into this PDF and save it, or print it and write by hand.

This worksheet is for your preparation only — nothing here is submitted to us. Your answers count once they are entered in the online Week 2 form. Fields marked * are required there.

STEP 1 · YOUR DETAILS

Contact Information

First Name *

Last Name *

Email Address *

Mobile Phone *

Which parish are you with? *

STEP 2 · DONORS

Envelope Numbers

Pull up a few families you know well and check their envelope number and whether the "Cancel Envelopes" toggle is correct.

- **Tip:** you can use the view "Env File Will be Included".

Which donor records did you check? *

#	Donor / family name	Envelope #	Env # correct	Cancel toggle correct
1			☐	☐
2			☐	☐
3			☐	☐
4			☐	☐
5			☐	☐

Are there any issues with the donors you checked? *
☐ Yes ☐ No

If Yes — describe the issues:

Tip: save screenshots of any issues — the online form lets you upload up to 3 files (.pdf, .png, .jpg, .gif).

STEP 3 · DONORS

Separate Statements

Check a few families who prefer separate statements. Did those donations come over separated, with the donors marked as "Individual"?

#	Donor / family name	Donations separated	Marked Individual
1		☐	☐
2		☐	☐
3		☐	☐

Were there any issues with the donors you checked? *
☐ Yes ☐ No ☐ N/A

If Yes — describe the issues, including links to the contacts in MinistryPlatform:

Tip: save screenshots of any issues — the online form lets you upload up to 3 files (.pdf, .png, .jpg, .gif).

STEP 4 · PLEDGES

Pledge Campaigns

Confirm your Pledge Campaigns migrated. Compare a few donors' Pledges tab to your legacy system.

Donors you compared (optional, for your reference)**Were there any issues with the pledge campaigns? ***
☐ Yes ☐ No ☐ N/A

If Yes — describe the issues you encountered:

Tip: save screenshots of any issues — the online form lets you upload up to 3 files (.pdf, .png, .jpg, .gif).

STEP 5 • PROGRAMS

Programs, Giving Funds & Activities

Review the Programs that migrated — check Past Programs too. Are you missing any Giving Funds or Activities?

- **Views:** Current Programs and Past Programs on the Programs page.

Were there any issues with Programs? *

☐ Yes ☐ No

If Yes — describe the issues you encountered:

Tip: save screenshots of any issues — the online form lets you upload up to 3 files (.pdf, .png, .jpg, .gif).

STEP 6 • PRACTICE

Enter Batches

Add at least 2 new batches with 5 donations each using Batch Manager.

Names & dates of the batches you created *

#	Batch name	Batch date	# of donations
1			
2			
3			

Did you encounter any issues entering batches? *

☐ Yes ☐ No ☐ N/A

If Yes — describe the issues you encountered:

STEP 7 • ANYTHING ELSE

Additional Notes

Any other notes about your data check this week that you'd like to share?

Next step: return to your Week 2 page and enter these answers in the online form, attaching any screenshots of issues.