



The Giving Unit Summary Page

- What is it?
- Why did we make it?
- What does it look like?
- How can I learn more?



What Is The Giving Unit Summary?

- A read-only page (watch that webinar!)
- One row per household (could be a company)
- Summarizes giving for all individuals in the household
 - For Last Year
 - For This Year
 - For Online
 - For a Comparison Period you can set (say pre/after onsite activities cancelled)
- Might run slow on some systems as it is real-time.



Why'd We Make The Giving Unit Summary?

- MAINLY, So you can communicate with donors
 - Whose giving has changed dramatically
 - Who are not yet giving online
 - Who are involved at a level in your church that makes this communication appropriate
- ALSO, so you can see how giving YTD compares to last year and pre/post COVID19



Aren't there reports and views that do this?

- Yes, but some of the nuances are hard to get at like when one person in the household gives online and the other does not. OR when the one who changed the giving to online after Covid19 is different from the one who was writing the checks.
- Yes, but we wanted a HOUSEHOLD (Giving Unit) level summary AND the ability to use the new message tool to ONE specific contact in the Household.



It could still be better...

- The first HH Family Member is not necessarily the donor.
- There is a lot of information in the database we didn't "shove" into this page.
- Some facts that would seem very relevant have been left off pending some learning on our part.
Ex. Donation Frequency and Level which are new and describe a donor's habits not a giving units.



Random Thoughts From Kevin

- People who used to give cash, if they continue giving, may look like new donors.
- People new to online giving may result in duplicate records.
- This page is your clearest, simplest link to “recent donors” where you are communicating with one person in the giving unit.



Let's stop talking and go [take a look](#) at this...

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