Donor Management Software System

Result oriented activity for increasing presence in the world ...

- Manage donors, enquiries
- Regular followup with Donors with all details
- Maintain all info @ 1 place
- Provide Donation receipt
- Custom reports, downloads
- Any team can refer details securely

"**Donor management**" is simply the **process** of tracking the details of your **donors**and your interactions with them, and then using that information appropriately. ... Appropriate **donor management** can improve your fundraising.

Benefits:

Online registration	Maintain student records	Eligibility criteria	Online payment
			

Generate receipts 	Time Scheduling 	Report generation 	Online Admissions 
Central, secured Data 	Easy for Parents 	Futuristic 	Dependable 
Auto Reports 	Save Time, Costs 		

Facts:

- ✓ Google will search based on your website presence in multiple areas.
- ✓ Submit your website in multiple accounts to get more leads.

Deliverables:

1) SMS Auto System integration & working
2) Donation details > New team > View options
3) Quick pay > All types > From - To Option
   Update in Donor validity option
4) Graph summary > Through collection list
   Show Reference-wise column (with changed text)
5) Advanced search
   Search by different check-box fields
   Reference, Collection-from drop-down or text search
6) Report > Areawise or collection list
7) Collection person > New field
   According to Donor & similar to reference
8) Custom Report > Export > Check Marathi text
9) Reports > Donor info form details > Column > Donor remarks
10) Control sheet > Table-wise summary > Show @ last only
    Refer attachments, rename > “Manager / CEO”
11) Label settings > Excel or Access system
12) All list > All donor info > Similar to advanced version of ‘Donor info form details’
13) Daily register report > Sort by date & donor
    Show ‘PAN’ field
14) Report > Palyabhet > Show ‘PAN’
15) Receipt > Category = Corpus > View > single only
    Branch > Sometimes only code (Show label)
16) Donor Counts with different selections like Donor, Sponsorship, FCRA, Sponsorship Corpus.
17) Donor Dates according to different types.
18) Summary of all reports.
19) Donor Form redesign.
    Add education list, modify many donor fields.
20) Donor Data - Excel download.
    Option to import → Maintain ID & all other data.
21) Donation details
    [Send Email] → On click Send email with all Donation details. Option to change contents & send as Email.
    Also save in Email as reference.
22) Control Sheet - Daily
    Select date & get all donation details according to all types.
23) Control Sheet Summary
    Select from & to date. Get all summary according to all types.
24) New Donor data → Option to enter new donor data through link.
    Admin or Team will approve to get into Donor database.
    Customized view.
25) Understanding requirements
26) Consulting better options for results

Scope of Supply:
Manage Module:

Search:
Search Donor, Teacher, Team member etc in a single click.
Get Name, Mobile number, Email etc.

Enquiry:
Add new Donors information and confirm to reflect the data in Donors list .
Collect all Donors data like Name, Mobile, Email, Birthday, address, category, subjects, college, branch etc.
Keep enquiry data separate till they confirm admission.

Donor / Donor:
Edit or update Donor’s all information.
Search according to the keyword of Donors.
Search Donors of specific category, subcategory, subjects, status etc fields.

Donor Follow-up:
Keep in touch with specific Donors according to different conditions.
Very easy & no need to remember Donor’s follow-up.
Similar follow-up system for enquiry.

Teacher Enquiry:

Add new teacher information & click on confirm to reflect the data in teachers list
Edit or delete the Teacher's entries if necessary
Search the Teachers according to keyword like branch, education, experience etc.

Teacher:
Update or edit teacher's info like mobile number, address, subject, admin details,education details
Edit or delete the entries if necessary
Search the Teachers according to keywords

Accounts Modules:
Fees:
Add total fees to be paid and no. of installments
Add details about fees paid with date and receipt numbers
Search the data according to Donor's fees (fees / paid / balance).
Automatically send Fees info to Donors, 1 day before schedule.

Fees Follow-up:
Get Donors info who will be paying fees as per commitments.
Very easy to keep track of Donors who are not yet paid or going to pay in this week!
Accountant's activity drastically gets reduced.

Fees Details:
Get all info about payment done or yet to pay.
This module also gives info about installment details, receipts etc.

Quick Pay:
This module will be used to receive fees quickly.
Example: Miscellaneous, Form fee, Late fees, Cheque bounce, LC, TC, Bonafide etc.
This module reduces a lot of time in receiving fees.

Expense:
Add new expense details inclusive of date of expense, type, amount and other details
Edit or delete the entries if necessary
Search the data for mentioned keyword or field on the page.
Very easy to record all expenses in one location.
Also easy to analyse expenses in organization.

Summary Accounts:
This gives summary details according to different accounts like Bank 1, Bank 2, Cash, Others.
Can be used to check relation with passbooks or account details.

Summary Subject Paid:
This module gives info about subjectwise fees collection.
We can also get info according to specific date also.

Task Module:
Search :
1. Donor : Search mobile no or user ID or email or parents mobile no etc according to criteria.
2. Teacher: Search mobile no or user ID or email etc according to criteria
3. Fees: Search mobile no or user ID or email or parents mobile no according to criteria
Search Donors who are paid partially / fully, according to due date.

Task:
Assign a task or reply for the assigned task for user ID's
Helps to understand everybody's role clearly.
What are my activities to do on specific date?
Communicate with effectiveness to others on paper.

Info Module:
Notice:
Add all notices with details like Date, title, subject, category, subcategory
Mark the entities who can see the notice like Donors, manager, teacher, all

Message:
Send message, for the registered user ids, with details like subject of message n other details.
Reply or delete the entries if necessary
Search the data for mentioned keyword or field on the page.

SMS:
Send SMS for the registered user IDs
Use available templates to speed up your work
Mark the entities to whom you want to send the SMS

Email:
Send email for the registered user IDs and email ids
Use available templates to speed up your work

Mark the entities to whom you want to send the email.

Links:
Add desired Calendar link to share information with all users
Add desired Photos link to share photos with all users

Website:
Menu & SubMenu:
Internal website Menu. Helps in grouping different webpages.
These pages can be viewed by all organizational members like Donors, Teachers, Managers etc.
Saves a lot of paper work.
Ready with technology.

Pages:
Create different pages similar to website.
Very easy to create web-pages.
Little knowledge of MS Office is sufficient.

Reports Module:
Reports with fields:
All admin and Manager can see the reports.
All reports refer to specific centers only for the analysis.

Donor:
Get report in excel sheet with fields Username, First, Last, Mobile, Subjects, Fees, Paid, Balance, College, Branch, Year, Reference, Remarks, Parents_Mobile, Status, JoinDate
Subject:
Get report in excel sheet with fields Username, First, Last, Mobile, Subjects, Fees, Paid, Balance, Due date, Teacher, Remarks

Teacher:
Get report in excel sheet with fields Username, First, Last, Mobile, Subjects, Fees, Paid, Balance, Due date, Teacher, Remarks

Birth day:
Get report in excel sheet with fields birthdate, ID, first name, last name, Mobile numbers and email ids.

Expense:
Get report in excel sheet with fields Date, Expenses
Fees:
Get report in excel sheet with fields fees amount, date

Attendance:
Get report in excel sheet with fields Username, First, Last, Date, %Attendance

Task:
Get report in excel sheet with fields Responsible, Date, Task, details

Login Module:
Profile:
Check your profile details like user ID, mobile no, email id.
Change the details if necessary
Change Password:
Change the password any time for any number of times as per the requirement.

Logout:
Log out from your profile before you leave your systems for the privacy and security purpose.

Strategies:

1. Communicate effectively.
In other words, if a major donor specifically requests that you send her all communications by mail — and never call or send e-mails — make sure you do just that.
2. Send a survey.
I know, I know — you're thinking, "Oh no, not another survey!" But they work. And they give you the information you need to understand each major donor's individual needs and desires. Not to mention what surveys do to engage your donor with the organization.

Remember: Everyone's favorite subject is themselves.

3. Invite them to events.
Not just those old-school galas and house parties. Also ask them to attend VIP phone briefings, site visits and/or virtual (online) gatherings. Those who attend will feel bonded with the organization, and those who don't will feel like they're part of the in-crowd for being asked.

4. Provide individualized programmatic updates.
One of the questions you'll ask on the survey is, "Which of our programs is of most interest to you?" When you send a press release, program report or other update to a donor, make sure to highlight the program that means the most to that specific person.

5. Say thank you over and over again.
There is still nothing more effective than a warm, personal and handwritten thank-you note. But keep in mind that some of today's tech-savvy donors prefer e-mail acknowledgements and accommodate them accordingly.

6. Give appropriate recognition.
When your donors receive their personal copy of your annual report, what do you think they read first? Believe it or not, they turn to the donor recognition page(s) and look for their name. So it better be there — and spelled correctly. And depending on their gift level, each donor also should be recognized with certificates, plaques, room/building naming opportunities, etc.

7. Listen, listen, listen.
When you effectively communicate, read each survey response carefully, promote engaging events, provide targeted programmatic updates, say thank you sincerely, and bestow appropriate recognition, what you are really doing is listening — and responding in a meaningful way — to what your donor is saying. When it comes to raising essential funds to fulfill your critical mission, what's more important than that?

FAQ :

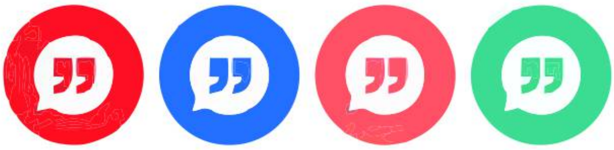
1.What is Donor Management ?
Donation is a fundraising platform for nonprofits. It significantly enhances the fundraising capabilities of the nonprofits by providing them the tools that are intuitive yet very effective.

2.What can we do with the Clicksin?
With Clicksin, you can collect donations, organize events, sell tickets, run peer to peer fundraising campaigns, manage memberships, manage and communicate with donors and a lot more.

3.Does Clicksin use social media for promoting campaigns?
Clicksin is fully integrated with social media that include Facebook and Twitter in multiple levels including campaign promotion, peer to peer fundraising and donation response pages.

4.How does Clicksin work with our website?
It is very simple. We will provide you custom donation and/or event page and all you have to do is link that page to the appropriate button on your website.

Quotes :



1. " There are two 'i's' in Fundraising – they should stand for inspiration and innovation, not imitation and irritation."
2. " If you need to raise funds from donors, you need to study them, respect them, and build everything you do around them."
3. " Nobody made a greater mistake than he who did nothing because he could only do a little."
4. " Fundraising is the gentle art of teaching the joy of giving."

5."Alone we can do so little; together we can do so much."
6." Only by giving are you able to receive more than you already have."

💰 Investment:

First time for System, design & Development = Only Rs. 50,000.
⭕ AMC = 20,000 Rs/year for hosting, online support, training.

The Best Donor Management Software Features

Rich Donor Profiles
Track contact data, relationships, interests, demographics, social media accounts, and more.
Control access as needed with role-based restrictions and security.
Deduplication features help you to keep your constituent data clean.

Donation Tracking

- Keep track of unique data with custom fields.
- Inspire smarter fundraising with relationships and householding features.
- Keep detailed notes to manage your donors better.
- Track donation history in our intuitive donor management system.

Direct Mail Fundraising

- Create professional letters with our built-in word processor.
- Capitalize on powerful mail merge tools for organized email managment.
- Exercise the best in breed label printing.
- Use bar code scanning for large scale direct mail solicitations.

NEW! Donor Management and Fundraising Performance Dashboard

- Customize dashboards for real-time visualization.
- Measure key metrics to track your donor management and fundraising goals.
- Get actionable information that helps you actually focus on retaining donors!
- Save and schedule reports to be delivered on a recurring basis.

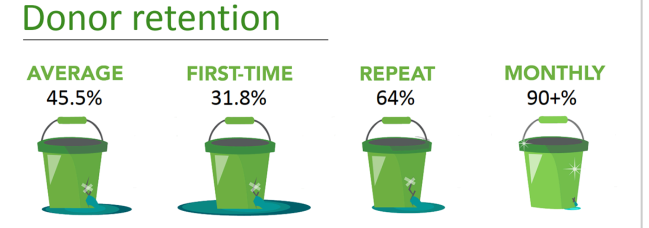
What is a Donor Management System or Nonprofit CRM?

A Donor Management System or Nonprofit CRM is a means of organizing, analyzing, and strategically implementing communication strategies with nonprofit supporters to maintain and grow those relationships.

It's common for companies to utilize a CRM, which refers to a means of Customer Relationship Management, to help build and strengthen their network of customers. With more research continually being done in the nonprofit space, it's clear that their business model can also benefit greatly from a relationship management system with their supporters. Some have called this Constituent Relationship Management, Nonprofit CRM, or a Donor Management System.

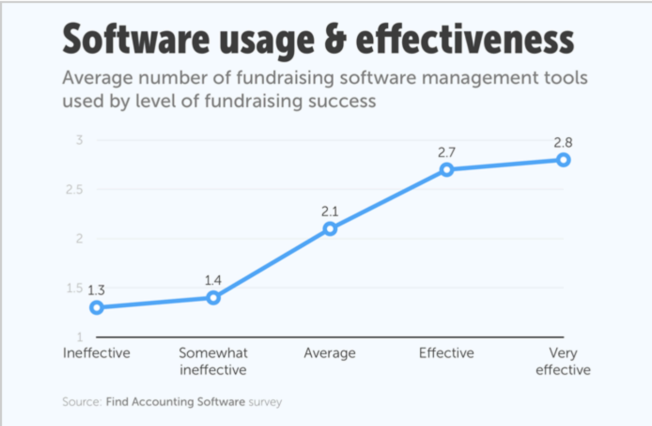
Managing fundraising efforts is not quite a scope of action to be executed manually, particularly within a larger nonprofit where donations arrive in all shapes and sizes. Sooner or later, all nonprofits and charities arrive at the same conclusion: organizing and reporting their data the old-fashioned way has little to no impact on their cause. Rings true, doesn't it?

Non-profit organizations (NPOs) have to deal with their own challenges, among them the retention of donors. With an average donor retention rate of just 45.5%, NPOs are going to be kept on their feet looking for ways to keep or expand their funds to meet their objectives. There's also the matter of NPOs sitting on old databases using manual technologies, with the bleak prospect of losing much data in the short and long-term, unless they find a way to migrate to digital solutions. So how does a modern nonprofit deal with the issue?

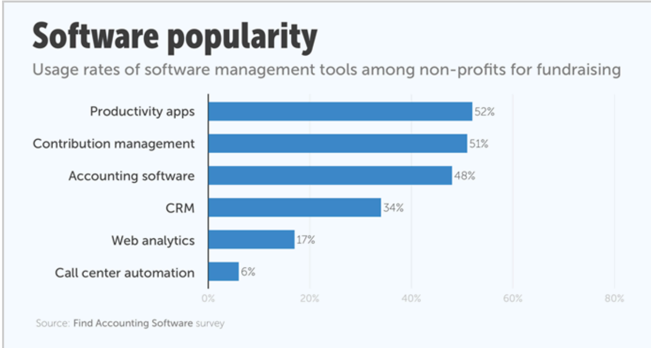


Source: Fundraising Effectiveness Project http://afpfep.org

Prevention is, of course, a much safer option for all organizations, materialized by purchasing automate and reliable donor management software. Many technology providers specialize in governing fundraising, which is why systems like these are easy to find, and even easier to afford. As discussed by Dr. Gloria Horsley, founder and manager of the Open to Hope Foundation, the full potential of donor management software has yet to be revealed, and will become nonprofits' main tools to humanize marketing, enable 24/7 fundraising, and discover valuable opportunities.



It is important to approach the process of choosing donor management systems with a wish list of fundraising features. Most systems are tailored to the needs of a specific funding branch, or will at least allow you to customize their functions until the system adapts to your requirements. The role models of the industry are, in fact, compact suites that combine customer relationships functions with accurate financial management tools, ideally equipped for collaboration and supportive to the organizations' marketing goals. According to TechImpact, these systems help assign a role to everyone involved in the fundraising process; automate cumbersome tasks in the service of efficiency, and make important information accessible everywhere, and by everyone.



What are the 20 best donor management software solutions of 2019?

1. Raiser's Edge NXT
2. DonorPerfect
3. Bloomerang
4. Planning Center
5. eTapestry
6. NetSuite for Nonprofits
7. MemberClicks
8. Salsa CRM
9. Qgiv
10. WizeHive
1. easyTithe

2. Network for Good
3. Wild Apricot
4. NeonCRM
5. Kindful
6. Donor Tools
7. Abila
8. DonorView
9. Virtuous CRM
10. Keela