



# The App Guide

## - Donor Management

Give donors a unified platform to access when they contribute. Use this application to identify donors by their interests, view how often they donate, and track the overall progress of your fundraisers.



[zoho.com/creator](https://zoho.com/creator)

# How the app works:

## Create a new campaign:

To get started, just fill out the *New Campaign* form in the *Campaigns* module. Enter the organization and campaign name, goal amount, and a brief description.

The screenshot shows the 'New Campaign' form within the Zoho Creator interface. On the left is a dark sidebar menu with the following items: Donor Management, Campaigns (highlighted in green), All Campaigns, Campaigns Report, Active Campaigns, Archived Campaigns, Pending Request, New Campaign (with a plus icon), Volunteers, Fund History, and Contacts. The main content area is titled 'New Campaign' and contains the following fields and controls:

- Organizer \***: A dropdown menu.
- Title \***: A text input field.
- Category \***: A dropdown menu with '-Select-' selected.
- Goal Amount \***: A text input field with a '\$' symbol on the right.
- Add a Deadline (optional)**: A checkbox.
- Location \***: A text input field.
- Related Image**: A text input field with a person icon and a link icon.
- Description \***: A rich text editor with a toolbar containing icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, image, and code. Below the toolbar is a large text area.
- Beneficiary Name \***: A text input field.
- Beneficiary Email**: A text input field with an envelope icon on the right.
- Beneficiary Address \***: A large text area.

## Notify the donors:

Whenever an organizer creates a new campaign, donors in your database will receive a notification email, along with a link that takes them to the *Active Campaigns* report.

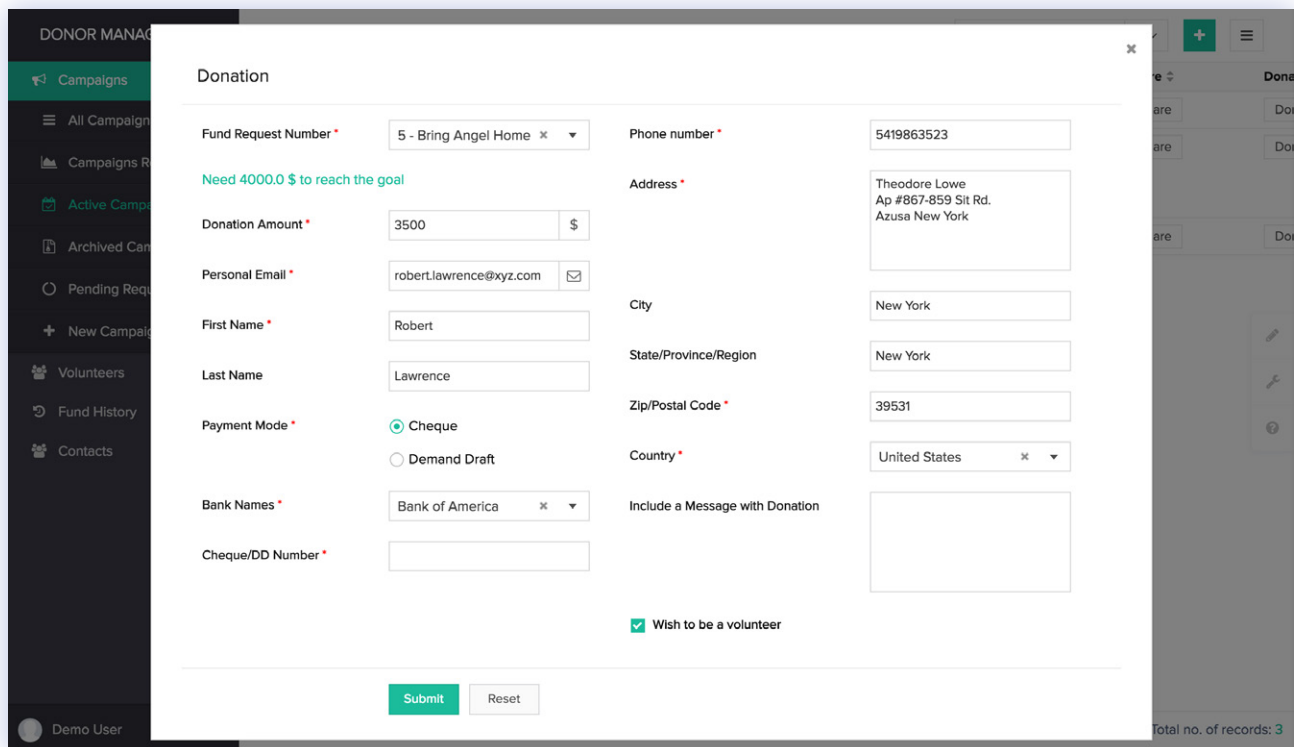
This report lists details about ongoing campaigns.

<input type="checkbox"/>	Title	Category	Goal Amount	Donated Amo...	Deadline	Beneficiary Name	Share	Donate
<input type="checkbox"/>	Send Kathy Back to School	EDUCATION AND SCHOOLS	\$ 8,500.00	\$ 10,000.00	13-Oct-2016	Kathy Grace	<a href="#">Share</a>	<a href="#">Donate</a>
<input type="checkbox"/>	Bring Angel Home	ADOPTION	\$ 20,000.00	\$ 16,000.00	14-Oct-2016	Raymond Levy	<a href="#">Share</a>	<a href="#">Donate</a>
<input checked="" type="checkbox"/>	Support Baby Aaron's Heart Surgery	MEDICAL EXPENSES	\$ 110,000.00	\$ 110,500.00	01-Sep-2016	Aaron Lopez	<a href="#">Share</a>	<a href="#">Donate</a>
<input type="checkbox"/>	Help Stephen Fight Cancer	MEDICAL EXPENSES	\$ 250,000.00	\$ 0.00	20-Aug-2016	Stephen Carpenter	<a href="#">Share</a>	<a href="#">Donate</a>
<input type="checkbox"/>	Help Victoria recover her home destroyed by fire	EMERGENCIES AND DISASTERS	\$ 75,000.00	\$ 0.00	25-Aug-2016	Victoria Garza	<a href="#">Share</a>	<a href="#">Donate</a>
<input type="checkbox"/>	Support Judy Family	KIDS AND FAMILY	\$ 50,000.00	\$ 32,500.00	31-Oct-2016	Judy McDonald	<a href="#">Share</a>	<a href="#">Donate</a>

Total: 6

## Make it easier for people to donate:

Your contacts can support the causes of their choice by clicking **Donate** and filling out the form shown below.



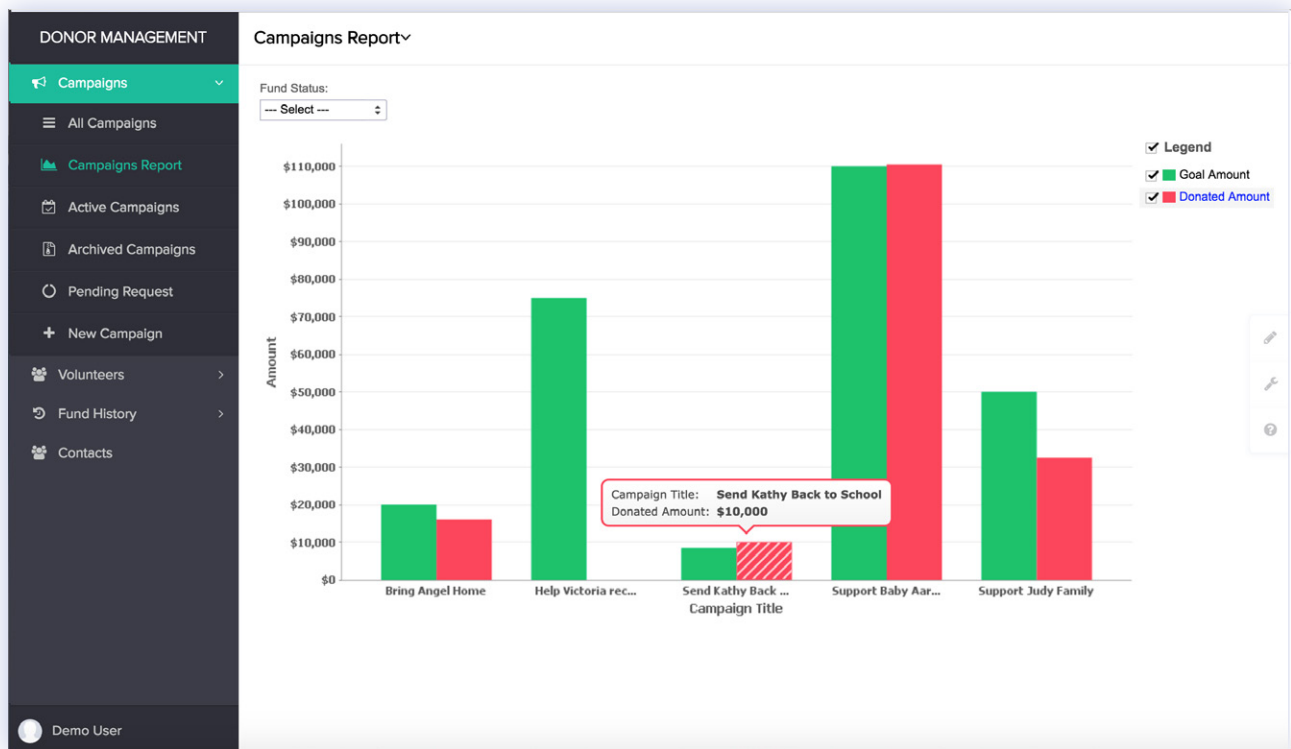
The image shows a screenshot of a web application interface for managing donors. A modal window titled "Donation" is open, displaying a form for entering donation details. The form includes fields for Fund Request Number, Donation Amount, Personal Email, First Name, Last Name, Payment Mode (Cheque or Demand Draft), Bank Names, Cheque/DD Number, Phone number, Address, City, State/Province/Region, Zip/Postal Code, and Country. There is also a checkbox for "Wish to be a volunteer" and a "Submit" button. The background shows a sidebar with navigation options like Campaigns, Volunteers, Fund History, and Contacts.

Field	Value
Fund Request Number	5 - Bring Angel Home
Phone number	5419863523
Need	Need 4000.0 \$ to reach the goal
Donation Amount	3500 \$
Personal Email	robert.lawrence@xyz.com
Address	Theodore Lowe Ap #867-859 Sit Rd. Azusa New York
City	New York
State/Province/Region	New York
Zip/Postal Code	39531
Country	United States
Payment Mode	<input checked="" type="radio"/> Cheque <input type="radio"/> Demand Draft
Bank Names	Bank of America
Cheque/DD Number	
Include a Message with Donation	
Wish to be a volunteer	<input checked="" type="checkbox"/>

(Donation form)

## Track your campaign progress:

How close are you to the finish line? Compare the campaign goal amount and the donations received so far with the *Campaigns* report.



(Campaigns report)

The *All Campaigns* report classifies campaigns by their progress status: active, completed, and pending.

The *All Campaigns* report classifies campaigns by their progress status: active, completed, and pending.

<input type="checkbox"/>	Title	Category	Goal Amount	Donated Amount	Deadline	Beneficiary Name
<b>Active</b>						
<input type="checkbox"/>	Bring Angel Home	ADOPTION	20000.00	16000.00	14-Oct-2016	Raymond Levy
<input type="checkbox"/>	Support Judy Family	KIDS AND FAMILY	50000.00	32500.00	31-Oct-2016	Judy McDonald
<input type="checkbox"/>	Help Victoria recover her home destroyed by fire	EMERGENCIES AND DISASTERS	75000.00	0.00	25-Aug-2016	Victoria Garza
<b>Goal Reached</b>						
<input type="checkbox"/>	Support Baby Aaron's Heart Surgery	MEDICAL EXPENSES	110000.00	110500.00	01-Sep-2016	Aaron Lopez
<input type="checkbox"/>	Send Kathy Back to School	EDUCATION AND SCHOOLS	8500.00	10000.00	13-Oct-2016	Kathy Grace
<b>Pending</b>						
<input type="checkbox"/>	Help Stephen Fight Cancer	MEDICAL EXPENSES	250000.00	0.00	20-Aug-2016	Stephen Carpenter
<input type="checkbox"/>	Help our warrior, Jack Flores, get to Olympics	SPORTS AND TEAMS	50000.00	0.00	15-Sep-2016	Jack Flores

(All Campaigns report)

## Refer a friend.

Donors can use the *My Referrals* module to invite their friends to support a cause.

Those who accept the invite will be added to the volunteer database.

<input type="checkbox"/>	First Name	Personal Email	Phone number	Address	Zip/Postal Code	Country
<input type="checkbox"/> Approved						
<input type="checkbox"/>	Wayne	wayne.peterson@xyz.com	4049778867	191-103 Integer Rd. Corona New Mexico	8219	United States
<input type="checkbox"/> Pending						
<input type="checkbox"/>	John	john@xyz.com	5641873492	300 BOYLSTON AVE E SEATTLE WA	98102	United States
<input type="checkbox"/>	Lea	lea@xyz.com	5419867635	200 E MAIN ST PHOENIX AZ	85123	United States

Total: 3

# We hope we can help your cause!

Don't forget to check out the other non-profit applications from our App Gallery. Just install and customize them to suit your needs.



## Event Management

Whether you're fundraising or building awareness, manage your event from start to finish. Promote events with personalized invitations, sell tickets online, and check attendees in with the mobile app.



## Volunteer Portal

Make it easier for your volunteers to help. Invite them to register online and take charge of organizing events. Collaborate with them and keep track of their plans, even while you're focusing on other matters.



## About Zoho Creator:

Running an organization is no mean feat, and we believe we can help. Rapidly build custom applications that are a perfect fit for your needs, or choose from our extensive range of pre-built apps and modify them. The best part? You don't have to be a programmer. Just sign up, pick a plan, and start building!

## Great brands that trust us:



PayPal

Honeywell

BBC

PIXAR



## We'd love to talk! Reach out to us:

[sales@zohocorp.com](mailto:sales@zohocorp.com)

US : +1 877 834 4428

UK : +44 (20) 35647890

Australia : +61 2 80662898

Spain : +34 918368598

India : +91 (44) 71817070