



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

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:

- Organizer ***: A dropdown menu.
- Title ***: A text input field.
- Category ***: A dropdown menu with '-Select-' selected.
- Goal Amount ***: A text input field with a dollar sign (\$) 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	Share	Donate
<input type="checkbox"/>	Bring Angel Home	ADOPTION	\$ 20,000.00	\$ 16,000.00	14-Oct-2016	Raymond Levy	Share	Donate
<input checked="" type="checkbox"/>	Support Baby Aaron's Heart Surgery	MEDICAL EXPENSES	\$ 110,000.00	\$ 110,500.00	01-Sep-2016	Aaron Lopez	Share	Donate
<input type="checkbox"/>	Help Stephen Fight Cancer	MEDICAL EXPENSES	\$ 250,000.00	\$ 0.00	20-Aug-2016	Stephen Carpenter	Share	Donate
<input type="checkbox"/>	Help Victoria recover her home destroyed by fire	EMERGENCIES AND DISASTERS	\$ 75,000.00	\$ 0.00	25-Aug-2016	Victoria Garza	Share	Donate
<input type="checkbox"/>	Support Judy Family	KIDS AND FAMILY	\$ 50,000.00	\$ 32,500.00	31-Oct-2016	Judy McDonald	Share	Donate

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 screenshot shows a 'DONOR MANAGEMENT' interface with a 'Donation' form. The form is titled 'Donation' and is part of a 'DONOR MANAGEMENT' interface. The form includes the following fields and options:

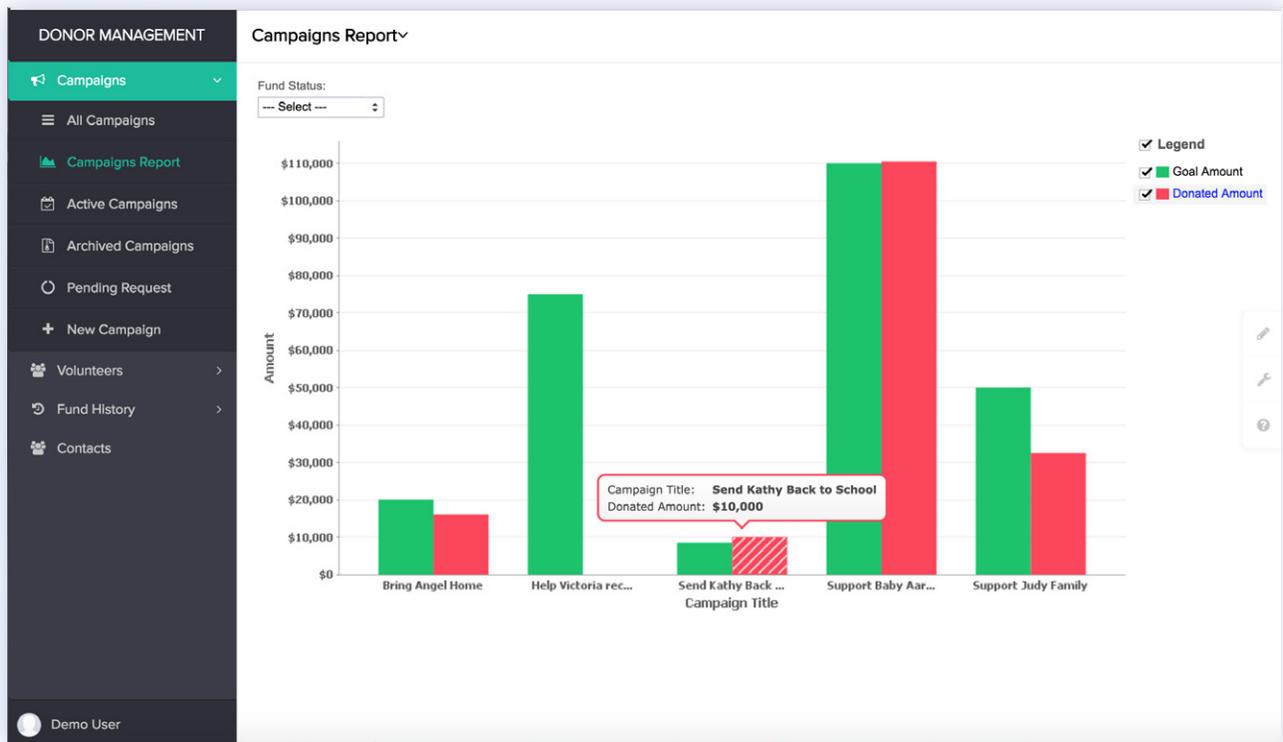
- Fund Request Number ***: 5 - Bring Angel Home
- Phone number ***: 5419863523
- Need 4000.0 \$ to reach the goal**
- Donation Amount ***: 3500 \$
- Personal Email ***: robert.lawrence@xyz.com
- Address ***: Theodore Lowe, Ap #867-859 Sit Rd., Azusa New York
- City**: New York
- State/Province/Region**: New York
- Zip/Postal Code ***: 39531
- Country ***: United States
- Payment Mode ***: Cheque, Demand Draft
- Bank Names ***: Bank of America
- Cheque/DD Number ***: (empty field)
- Include a Message with Donation**: (empty text area)
- Wish to be a volunteer**

Buttons: **Submit**, **Reset**

(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.

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<input type="checkbox"/>	Title	Category	Goal Amount	Donated Amount	Deadline	Beneficiary Name
<input type="checkbox"/> Active						
<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
<input type="checkbox"/> Goal Reached						
<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
<input type="checkbox"/> Pending						
<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

Total no. of records: 7

(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:

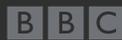
Running an organization is no mean feat, and we believe we can help. Rapidly build custom applications that are a perfect fit for your needs, or choose from our extensive range of pre-built apps and modify them. The best part? You don't have to be a programmer. Just sign up, pick a plan, and start building!

Great brands that trust us:



PayPal

Honeywell



P I X A R



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

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