Scenario

{Organisation} is a charitable organisation that {does their thing}. {Business} loves the work that {Organisation} does and wants to host a {type of event} to raise money for them.

{Organisation} used to manage this process outside of Salesforce, in spreadsheets, emails and in people's heads. They need a more robust solution to manage the whole process, from engaging with the {organisation}, to approving the fundraising activity, to collecting the funds, to ensuring all those are thanked for their generosity.

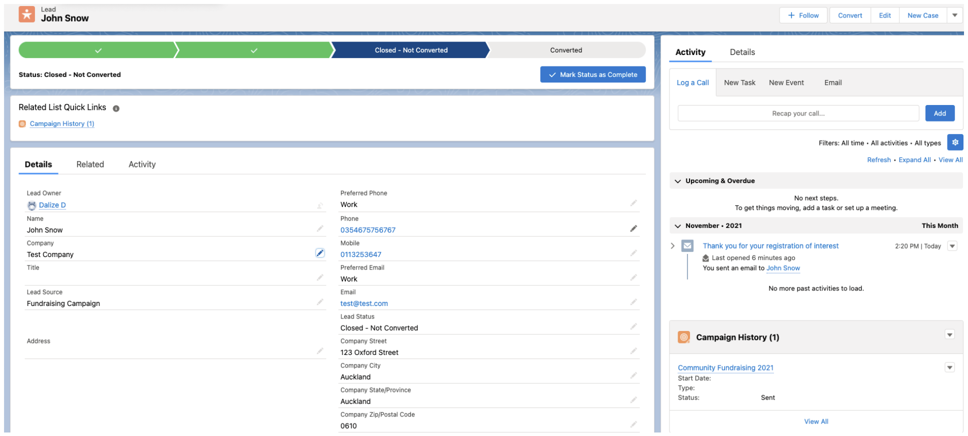
Personas:

- *{Business owner} that wants to fundraise*
- *Fundraising manager wants to raise funds*
- *{Organisation}'s Salesforce Administrator*

Story	**To Build**
{Organisation}'s fundraising manager needs a way to capture and manage the enquiry process, and has asked their Salesforce Admin to create a web to lead form. A web to lead form is an easy to set up web form that you can place on a website that will instantly create the enquiry as a lead inside Salesforce. *Note: Some organisations have strict policies on who they allow to fundraise for them on their behalf so that they can manage their reputational risk. Others want to make it easy for them to fundraise on their behalf, and produce fundraising packs, complete with printable PDFs with their organisation's logo and guides. Regulatory requirements vary by area, so make sure you're not breaking any laws. In the end, it's always a good idea to be pragmatic (you don't want to require kids with a lemonade stand to*	How should this lead be identified as a community fundraising lead? (website looking good, info etc)

have to go through a formal application process). You can learn more about Salesforce's web to lead functionality here. You want to make sure that you set up the relevant assignment rules and assignment notifications to make sure they go to the right user (or queue) inside Salesforce, and they're notified when a new lead comes in so they can action it quickly. You'll also probably want to setup an autoresponse rule to send the enquirer an email to thank them for registering their interest.	
The web to lead form can be as short or as long as you'd like it to be. Some organisations decide to keep them short enquiry forms to prevent 'form friction' (to help ensure they receive as many applications as they can. Others may choose to create custom fields on their lead, such as specific event details they're hosting. Tip: if you create fields on the lead level, make sure you map them to the opportunity. You can learn about field mapping here.	
{Business User} completes the web form and is created as a lead inside Salesforce. The fundraising manager now wants to learn more about {Organisation} and make sure they're a good fit, so their fundraising manager gives them a call, and logs their call in Salesforce. Create a lead process Match the lead process to the record type (record type) = community fundraising Lead source	Lead source: (as is) {Organisation} Status Open - Not Contacted Working - Contacted Closed - Converted Closed - Not Converted

Mention campaign



type

- statuses in salesforce

Ensuring when the lead is converted, they're converted to a community fundraising record type

Based off lead source

- Risk management
- Letter (lightning email)

- create 'Community Fundraising' record type
    - Create an email template stating 'Rejected'
    - 'Create Community Fundraising 2021' as a campaign
    - Take screenshots of

Subject: Thank you for your registration of interest

Hi {first name},

Thank you for your interest in fundraising for {organisation}. Unfortunately {Company} has not met {organisation}'s community fundraising guidelines and we are unable to support this application.

	Thank you again for your registration of interest and we wish you all the best moving forward. Kind regards, {user firstname} {user lastname} {organisation}
{Organisation} decides that they're a great fit	
>>> Select the 'fundraising' record type upon conversion - 'Make sure it's clear to the user that it's a community fundraising lead' (record type? Type field indicator)	
Opportunity	Enquiry / Contacted / Approved / Event Confirmed / To Follow Up (auto stage) / Funds Followed Up / Funds Received (Closed/Won) / Cancelled (Lost) Path at top with prompted fields at each stage.
As an NGO, I need a scalable way to accept requests and grant permissions to fundraise so community groups can comply.	Web forms integrated with Salesforce, validated information, List views, autoresponses.
As a fundraiser I need a letter that allows me to fundraise on behalf of a charity so that I can ask the community to contribute to the event/fundraising.	**Custom Fields required to track activity** - Name of Event / Type of Event / Purpose of Event / Expected Amount / No. of Attendees /

	Location of Event / Start Date / End Date The information in bold needs to be printed onto the Permission to Fundraise Letter so that the Fundraiser can solicit support for the event. This must be printed on the Charities Letterhead.
As a Finance Manager for an NGA I need to see my fundraising forecast of so that i can populate my cashflow forecast	Kanban view allows me to sun expected revenue by stage.
I'm a fundraising coordinator and I want people holding community fundraisers able to take donations online - cashless society and individual receipting	Set up a unique campaign on my donation landing page. Automates the creation of records and receipting, saving time for the fundraising team.

Reporting and Dashboards

>>> As a CEO I want to be able to TRACK the MONEY RAISED from COMMUNITY FUNDRAISING and REPORT on the success to my DASHBOARD.	Use NPSP Standard reporting for to generate the report and dashboard. → Objects used: Campaigns + Opportunity Record Type + NPSP Reports & Dashboards

Story	To Build
I am a fundraising coordinator and I want to be able to track the progress of community fundraising so that I never miss contacting the organisers and so I thank them properly for their efforts.	A Task is assigned to the Fundraising Coordinator to follow up three days after the Event Date. Create Email Templates to follow up after the event and ask the Community Fundraiser to remit funds into Charity bank account. Hi {first name}, Thank you for your fundraising on behalf of {organisation}. We hope that your event was a huge success. Please remit the funds raised into our Bank Account BSB 123455 Acc 123456789 and use your email address as a reference. As soon as the funds clear we will send you a receipt, thank you letter and certificate of appreciation. Can you please confirm what name you wish to appear on the certificate? Kind regards, {user firstname} {user lastname} {title} {organisation}

	The Finance Manager advises that the funds have hit the bank account so the Fundraising Coordinator closes as won, sends a thank you letter/receipt and Hard credit to account (school) soft credit depending on your rules.
I'm a fundraising coordinator and I want people holding community fundraisers able to take donations online - cashless society and individual receipting.	Create a donation landing page for the community fundraiser and integrate with Salesforce via Zapier etc
As a Finance Manager Fundraising I need to know what percentage of revenue came through this channel so that I can write my budget for next year.	Use NPSP Standard reporting as above
I am a new fundraising coordinator for a NGO and I want to know who has done community fundraising before so I can contact them to ask them to do it again	Use levels to allow us to categorise Accounts. Use affiliations to link people to community groups or businesses
As a Campaign Manager, I need to link multiple Campaigns so that I can have a clear view of the Child Campaigns related to larger Campaigns.	Use Campaign Hierarchy to show relationships between Events, Teams, Fundraiser and Donors. User Levels to categorise Donors (Contacts) Use NPSP Campaign Roll Ups Summaries

First, you may want to create the ability to apply online. Fo

Risk manager: to protect our reputation

Interested

Typical Process

- Usually approached by a business to fundraise on their behalf
  - Should cater for the scenario of approaching businesses also
  - Cater for source/channel
- Have a chat, complete a form (web to lead form for community fundraising)
- Lead reviewed by community fundraiser, make sure they have what they need / happy to get behind
- Provide them with an authority to fundraise letter
  - Approval processes
- Gather details (e.g. how many attendees, receiving mechanisms, how to handle big donors etc)
- Converted to an opportunity, marked as to follow up with after the event date
- Provide logo and style guide on their request, provide brochures etc
- After the event, follow up process, get event feedback, how much they raised
- Fundraising policy, letter to agree to fundraising guideline
  - Can use the letter to fundraise letter to get (for eg) discounts of florists
- Return the funds or bank the funds directly

- Receipts issued
- Thank yous made
- Reporting and visibility

Things to keep note of

- Provide permission to fundraise - sometimes it's required by law to have a permission to fundraise
- Peer to peer fundraising - build or buy, lots of platforms like Raisely and Grassrootz

User stories:

- {Business} need to

Non salesforce

- Create a fundraising pack, PDF
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Salesforce

What problems are we trying to solve?