

Donation Tracking System for NGOs

The Donation Tracking System is a Salesforce-based solution designed to automate and streamline the process of managing donations and donors for non-governmental organizations (NGOs). This project helps NGOs handle donor information, record donations, track campaigns, issue receipts, and manage donor communications. It ensures transparency, accountability, and efficiency in the fundraising process.

Problem Understanding & Industry Analysis

Many NGOs still rely on manual processes like spreadsheets or paper files to track donations and donors. This leads to challenges such as data entry errors, missed follow-ups with donors, delays in issuing receipts, and a lack of visibility into fundraising performance. Manual processes also make it difficult to comply with reporting requirements and maintain donor trust.

NGOs need a centralized, automated system to manage the entire donation lifecycle — from donor onboarding to campaign tracking, payment recording, and generating impact reports. A Salesforce-based Donation Tracking System provides a scalable, secure, and transparent way to manage donations and improve donor relationships.

Requirement Gathering

- Create donor records with basic details.
 - Record donations with amount, mode, and campaign.
 - Automate donation receipts/acknowledgment emails.
 - Link donations automatically to campaigns/projects.
 - Assign follow-up tasks to staff automatically.
 - Track donations and campaign performance via reports/dashboards.
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Stakeholder Analysis

- **NGO Managers:** Oversee donations, approve campaigns, track progress.
 - **Donors:** Make donations, update details, receive receipts.
 - **Fundraising Team:** Manage campaigns, follow up with donors, send thank-you notes.
 - **Finance/Accounts Team:** Verify payments, handle compliance and reporting.
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Business Process Mapping

1. NGO staff creates donor record.
2. Donor makes a donation (online/offline).

3. System records donation and links it to a campaign.
 4. Automatic receipt sent to donor.
 5. Tasks created for staff (follow-up, thank-you, reporting).
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Possible Exceptions

- Donation payment failure or reversal.
- Duplicate donor records requiring merge.
- Wrong campaign mapping needing reassignment.
- Donor requests refund or cancellation.

Industry-Specific Use Case Analysis

- **Charities & NGOs:** Manage large volumes of donors and campaigns.
 - **Educational Foundations:** Track alumni donations and scholarships.
 - **Healthcare Nonprofits:** Handle recurring donations for patient care programs.
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AppExchange Exploration

- **Reviewed donation and fundraising apps** on Salesforce AppExchange.
- **Examples:** Fundraising apps, donor management tools, payment processing packages.
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- **Key features observed:** Automated donation tracking, dashboards, donor engagement workflows, receipt automation.
 - **Insight:** These features help design a Salesforce-native, customized donation tracking system.
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