CRM for Non-Profits

Functional Requirements Document

User Roles

- Super Admin Users: Super admin users would be able to create Non-Profits.
- Admin Users: Admin users manage individual Non-Profits.
  - Admin Users
    - They would be able to access the entire organisation
  - Employees
    - Should be able to access set of modules
  - Members
    - Should be able to access a set of modules

Menu

Home
- Dashboard
- Contacts
- Donations
- Events
- Campaigns
- Calender

Contacts
- All Contacts
- Donors
- Organisations (An organisation can have many contacts under it).
- Add a Contact

Donations
- All Donations
- All Pledges
- Add a Donation
- Add a Pledge

Events
- All Events
- Calender
- Upcoming Events

- Past Events
- Add a New Event

Campaigns

- All Campaigns
- Upcoming Campaigns
- Past Campaigns
- Add a New Campaign

Reports & Analytics

- Donations Report
- Contacts Report
- Pledge Report
- Event Report
- Campaigns Report

Contacts

Admin users would be able to add contacts in the following way:

- Manually add individual contacts
- Upload an excel sheet
- Load contacts via Gmail and Hotmail

Show all the contacts in the following format:
Reference: https://mannatthemes.com/metrica/light/projects/projects-users.html

Our Reguler Users

Users	Rols	Email	Contact No	Status	Action
Aaron Poulin	Agent	AaronPoulin@example.com	+21 123456789	Active	
Richard Ali	Administrator	RichardAli@example.com	+41 123456789	Active	
Juan Clark	Contributor	JuanClark@example.com	+65 123456789	Active	
Albert Hull	Agent	AlbertHull@example.com	+88 123456789	Active	
Crystal Darling	Contributor	CrystalDarling@example.com	+56 123456789	Deactivated	
Thomas Milligan	Administrator	homasMilligan@example.com	+35 123456789	Deactivated	

Contacts would have the following fields:

Tab 1: Overview
1. Gender (Mr./Mrs/Miss/Other)
2. Contact Name
3. Contact Phone number with ISD number
4. Contact Alternate phone number
5. Contact Email
6. Contact Address
7. Contact Organisation (Drop down from the Organisation)
8. Designation
9. Contact Photo
10. Contact Social Media Details
    a. Facebook
    b. Twitter
    c. LinkedIn
11. Contact tags

Tab 2: Donations: List view of all donations done by the contact
1. Donation Date
2. Frequency of Donation: One-Time/Recurring
3. Donation Amount
4. Type of Donation
5. Donation at an Event:
6. Donation for a Campaign:

Tab 3: Reports
1. Email Verification (Yes or No)
2. Phone Verification (Yes or No)
3. Total Donations so far
4. Chart showing monthly donations since the user was created in the system.
5. Donor Rank (I will discuss this later)

Donations

The following information should be tracked for each donation

Add Donation Functionality:
1. Add the contact via searching either name, phone number or email ID.

2. If the donor is a new user, whose contact details are not mentioned in the Contact table, then within the same donation page, open the fields for adding the contact. Do not redirect to the add contact page.
3. Donation Amount
4. Payment type: This would be a drop down. Seperate page to create different donation types.
5. Donation Mode: This would be a drop down. Seperate page to create different donation modes.
6. Date

Donation List View:
The look of the donations list view should be following:
https://mannatthemes.com/metrica/light/crm/crm-customers.html
Instead of Email & Phone number, show the Donation Amount & Payment Type (Cheque, Cash, Bank Transfer, etc.)

Upon clicking the item, it expands, showing full details of the donation:

Pledges

The following information should be tracked for each pledge

Add Pledge Functionality:

7. Add the contact via searching either name, phone number or email ID.
8. If the Pledger is a new user, whose contact details are not mentioned in the Contact table, then within the same Pledge page, open the fields for adding the contact. Do not redirect to the add contact page.
9. Pledge Amount
10. Date of Pledge
11. Anticipated Date of fulfilling the Pledge
12. If the Pledged amount is already donated or not:
    a. If yes, then link it with the donation ID.

Pledge List View:
The look of the pledge list view should be following:
https://mannatthemes.com/metrica/light/crm/crm-customers.html
Instead of Email & Phone number, show the Pledge Amount & whether its Donated or not (Fulfilled or Due)

Upon clicking the item, it expands, showing full details of the pledge.

Projects

This will be the UI for the Project List View page:
https://mannatthemes.com/metrica/light/crm/crm-leads.html

The table should show the following:
1. Project Name
2. Project Lead (Picture & Name)
3. Estimated Cost
4. Total Spent so far
5. Status
6. View/Delete

Following functionality should be there on the Project Details page

Tabs design is available at: https://mannatthemes.com/metrica/light/others/ui-bootstrap.html

Following tabs should be there in the Project Details page:
1. Project Overview
    a. Project Name
    b. Project Short Description
    c. Project Long Description
    d. Project Start Date
    e. Project End Date
    f. Estimated Budget:
    g. Project currency:
    h. Project Lead: You should pick the project lead from the contact list.
    i. Project Members: User should be able to pick the members from the contact list.
    j. Project Status: (Drop-down with the project status, separate page where you can add project status)
    k. Project tags: Upto 10 project tags can be added.

2. Expenses: List view of all the expenses. Each expense should have the below data.
    a. Expense name
    b. Expense date
    c. Expense submitted by
    d. Expense amount
    e. Expense type: This is a drop down. A seperate page is needed to define different type of expenses.

f. Expense currency (It's a dropdown. By default, this should be the currency of the project. But user can modify the currency. If different currency is selected, user should provide the how much is value of the currency. For example, if Project currency is INR and expense is done in Dollars. The user specifies 1 $ = 70 INR.
g. Total amount in Project's Local currency:

3. Project Attachments: List view of al the project attachments (Check this UI for attachments: https://mannatthemes.com/metrica/light/others/ui-files.html) This UI should come within the tab layout.
    a. Name of the attachment
    b. Upload attachment (upto 3 attachments per attachment name)
    c. Attachment tags

Events

Ability to add Events. Events should have following meta data:

1. Event Name
2. Event Start Date/Time & Event End Date/Time
3. Event Venue
4. Event Header Photo
5. Event Short Description
6. Event Long Description
7. Event Attachments (PDF, JPEG, PNG < 2MB per file)
    a. Upto 3 attachments.
8. Paid Event (YES/NO)
    a. If YES, cost per ticket.
9. Enable Event Registrations (YES/NO)
10. Generate Public Facing link (YES/NO)
    a. If yes, you need to generate a public facing link of the Event.

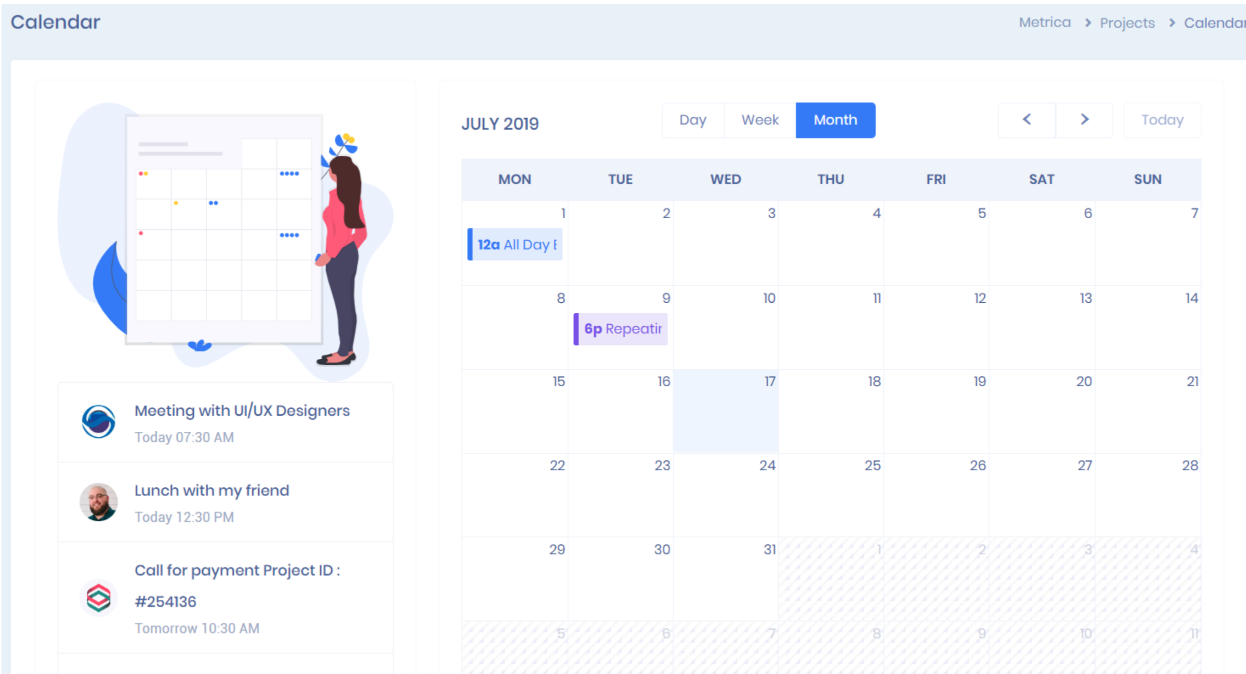
From a functional standpoint, event details page would have following tabs

(1) Details
    (a) All the meta data of the event.
(2) Registered Users
    (a) All the users who registered for the event.
(3) Analytics
    (a) Number of registered users.
    (b) Number of New Contacts registered to Event.
    (c) Number of Existing contacts registered to Event.

Calender

Calender should show with dates marked for events.

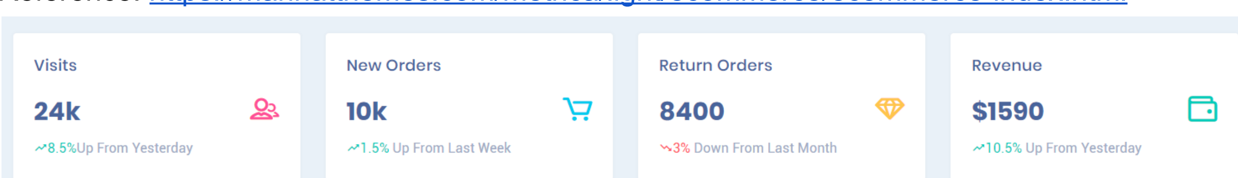
https://mannatthemes.com/metrica/light/projects/projects-calendar.html



Dashboard

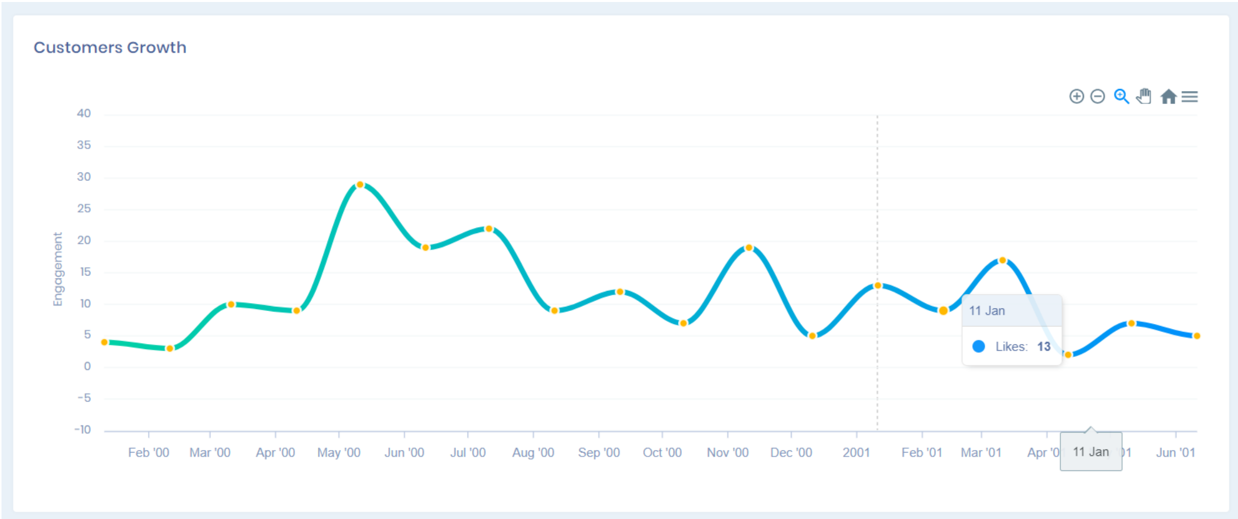
Following items would be present in the dashboard

Reference: https://mannatthemes.com/metrica/light/ecommerce/ecommerce-index.html



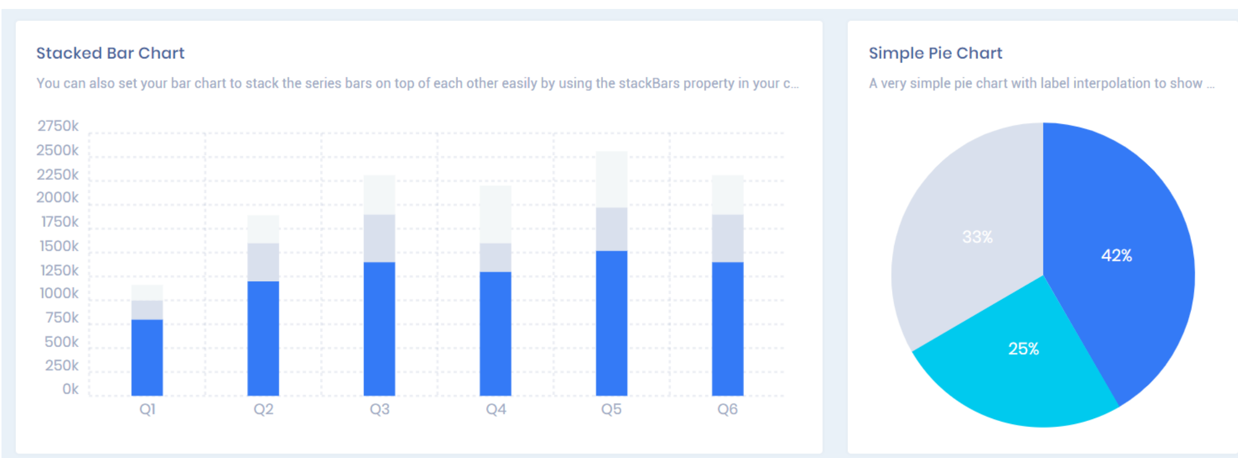
New Contacts:<Current Month>
Total Donors: <Current Month>
Total Donations: <Current Month>
Total Expenditure: <Current Month>

Donations Progress - Each Day - Last 30 days



Contacts Progress - Last 12 months report

Type of Donations - Last 12 months - The pie chart shows the aggregate values for last 12 months.
https://mannatthemes.com/metrica/light/others/charts-chartist.html



Reports

Following reports would be supported

- Donations Report
    - Total Donations per month
    - Donations from First time Donors per month

    - Donations from previous Donors per month
- Contacts Report
    - Contact Growth - Last 12 Months - Line Graph
    - New Contacts - Last 12 Months - Bar Graph
- Pledges Report
    - Total Pledges per month - Last 12 months
    - Total Pledge Amount per Month - Last 12 Months
    - Pending Pledges Amount - Last 12 months
    - Pending pledge amount - Over Due (Pledges committed to a date but missed the deadline)

Campaigns

A Campaign should support following fields
- Campaign Name
- Campaign Target Amount
- Campaign

Asset Management

Asset management module deals with managing all the assets within the non-profit. There are two types of assets
1. Physical Assets (Hardware)
2. Virtual Assets (Software Licenses)

Physical Assets
Following functionality would be there in the List View of the Physical Assets

Settings

Following settings, fields should be there.

1. Display Settings
2. Language
3. Time Zone & Date Format
4. Currencies
5. Tax
6. Mail Server

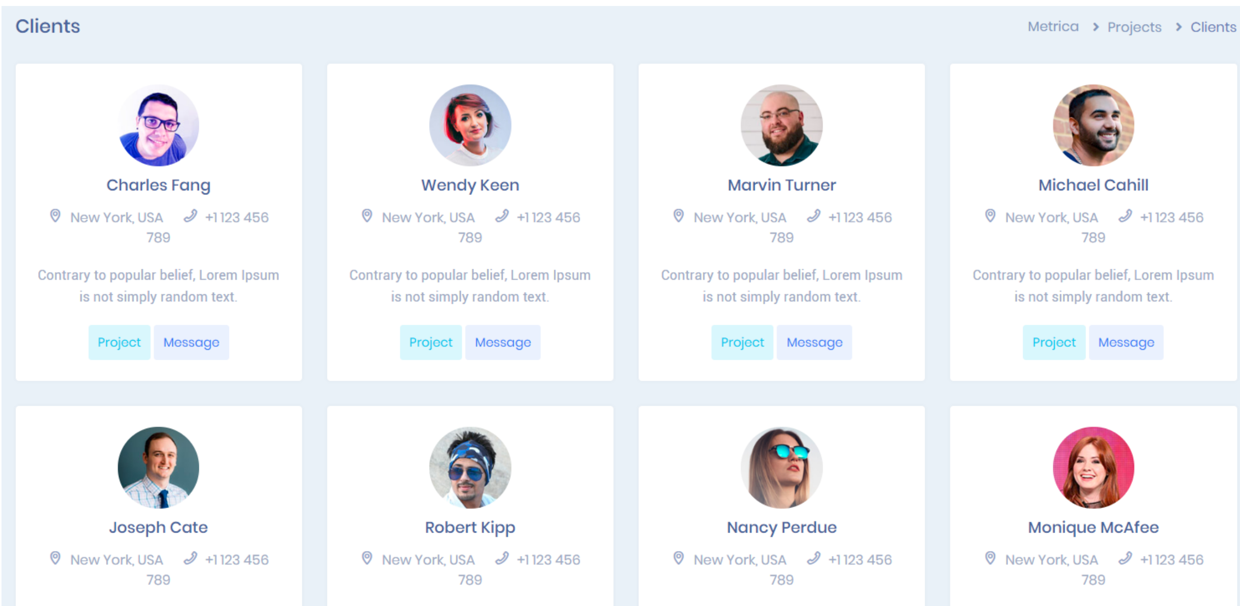
Reference: https://demo.laravel-bap.com/settings/timezone

My Organisation

Following functionality would be there under My Account Page

Profile of the Non-Profit

Board of Directors

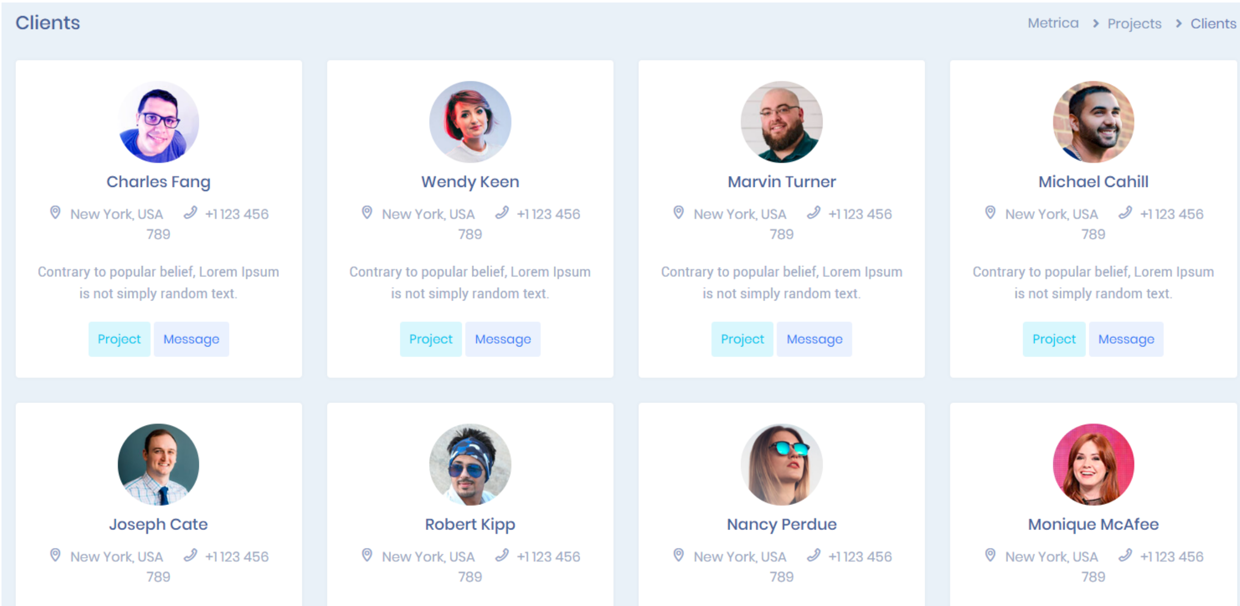


Ability to add the following about the Board of Directors:

1. Select the Board of Directors from the Contacts.
2. Brief Description about the Board of Directors
3. Term: Start Date and End Date

Employees

(Functionality same as Board of Directors)



https://mannatthemes.com/metrica/light/projects/projects-clients.html

Members / Volunteers

Same functionality as Employees.

Marketplace

In the marketplace funcitonality, admins of the non-profits would be able to add subscription to various add-ons.

Asset Management