Software Requirements Specification for

Fundraising management web application

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**1. Introduction**

The Fundraising Management Web Application is a comprehensive online platform designed to streamline and enhance the management of fundraising campaigns and donor relationships. This application aims to provide nonprofit organizations and fundraising professionals with a user-friendly solution to effectively plan, execute, and track their fundraising efforts, ultimately maximizing donor engagement and contribution.

1.1 Purpose

The purpose of this Software Requirements Specification (SRS) is to outline the functional and non-functional requirements of the Fundraising Management Web Application. This document serves as a reference for stakeholders, developers, and testers to ensure a clear understanding of the system's capabilities and constraints.

1.2 Project Scope

The Fundraising Management Web Application encompasses features for donor relationship management, campaign planning and execution, donation tracking and reporting, communication and engagement, volunteer management, grant management, data security and privacy, as well as integration and customization.

**2. Overview**

**2.1 Product Editions**

There will be only one version of the product:

1. Cloud Edition

The instance of the software will be hosted on reputed Cloud hosting. For Bangladeshi clients, it will be hosted on servers located in Bangladesh to comply with Fundraising management web application . All instances will get a dedicated Fundraising management web application subdomain for them; if necessary with a custom domain name.

**2.2 Product Features / Key Modules**

The major features this program contains are the following:

1. Registration/Login

a. Registration with email

b. Registration Step - Basic info, Entity related info, Mentoring info

c. Email verification

d. Forget & reset password

2. User profiles

a. Profile view

b. User badges

c. Profile edit

d. Privacy settings

e. Email newsletter preference

f. Update password

g. Download CV

h. Profile Sections - About, Experience, Education, Skills, Publication, Social, Basic Info, Entity related info

3. Directory

a. Pending Users Approval

b. Manage Users

c. User groups

d. Directory - List View/Map View

e. Filter Users

f. Sort Users

4. Job Board

a. Job Board

b. Single Job Details

c. Post Job

d. Manage Job

5. Event

a. All Event

b. Single Event Details

c. Create Event

d. Manage Event

e. Attendee Registration

f. On Spot Registration

g. Non-member Event Registration

h. Event Online Payment

i. Event Registration Custom Fields

j. Free/Paid Event Ticket

k. Guest Ticket

l. Event Attendee Export

m. Event Financial Overview

n. Upcoming & Past Event

o. Event Category

p. Invite to Event

6. Fundraising

a. All Fundraising

b. Single Fundraising Details

c. Create Fundraising

d. Manage Fundraising

e. Fundraising Online Payment

f. Amount suggestion

g. Non-member Fundraising Collection

h. Donors Export

i. Fundraising Financial Overview

j. Ongoing & Past Fundraising

k. Fundraising Category

l. Invite to Fundraising

7. Mentoring

a. Mentoring Topics

b. Willing to mentor

c. Mentoring Settings for Mentors

d. Send Mentoring Request

e. Accept/Decline Mentoring Request

f. Find Mentors

g. List of Mentors

h. Pending Mentoring Request

i. Mentoring Dashboard

8. Statistics & Dashboard

a. People by Country

b. People by Company

c. People by Job Title

d. People by Blood Group

e. People by Educational Institution

f. People by Degree

9. Emails & Broadcasting

a. Email Newsletters

b. Email Notifications

c. Email to All, to Group, to Individuals/Few

d. Email Newsletter Compose

e. Email Newsletter Manage

f. Email Newsletter Archive

10. Membership

a. Manage Membership Category, Fees, & Expiration

b. Pay Membership Fees - Online & Bank

c. Due Membership Fees

d. Financial Overview

e. Search Members by Membership Category

f. Export Members

11. Entity Settings

a. Entity Related Information

b. Membership Category & Fees

c. Mentoring Category

d. Event Category

e. Fundraising Category

f. Entity Privacy Settings

g. Add/Manage Moderators

13. Mobile App

There will be a mobile app for both iOS and Android where end-users can login and perform the basic functionalities.

a. Feed

b. Directory Browsing & Search

c. Mentoring

d. Job Board

e. Event Registration & Online Payment

f. Fundraising & Online Payment

g. Profile Management & Contact

h. Membership Enrollment

**3. Functional Requirements**

All major functional features for release v1.0 are covered below.

**3.1 User management**

1. **Registration**: New users can register themselves with Email, Facebook, & Linkedin. Admin can set up the custom field for the registration form second step. Recognizable profile picture, Full Name, Verified email ID, Mobile Number and Password is a must.

a. There will be settings for approval required or not.

b. After registration email verification is required.

c. When approval is required, the members will wait in the Pending Approvals. The

moderators and admin can approve, reject and block users based on their information.

d. The blocked member can not register to the site with the same email address.

e. A member can join another entity by signing to it with the same username and

password.

f. Settings -

i. Privacy - Make myself Publicly visible, Make myself Privately visible, Hide Me (only admin can see)

ii. Email Preference - Get email notification

1. Event Invitation

2. Donation Invitation

3. Job Board Notification

4. Mentoring Request

5. Weekly/Monthly Digest

2. **Login**: Users can log in to & logout from the system. Users can log in to the system with email-password or with Google, Linkedin, Facebook. Logged in via google will create a new account for new users or merge if the user already has an account associated with the email. The user can recover their forgotten password.

3. **Profile & Settings**:

a. Privacy

b. Update email preference

c. Change password

d. Change email

e. Update settings

3.2 **Entity Admin, Moderators**

An entity admin is a wrapper for features like entity moderator, the user (admin , donor). For example, the user can post a link, or articles (max 2000 words); entity authority can approve, update, and delete them.

**3.3 Directory**

A directory with verified members will be available for all the registered users. User will have a single profile; each profile will be verified rigorously so that no one can make a fake profile.

1. Directory List - All the users who will register in the platform will belong to the directory. A profile card with profile picture, name, current status and a link to the profile will be shown in the directory list. The member will have badges - Doners, Mentors, Paid Member & so on.

2. Filter Criteria

a. All - My Location - Mentors

b. Alphabetically - Recently Joined

4. Filter Criteria - There will be filter criteria by - First name, Last name, Location, Offering Help, Seeking Help, Offering Mentoring, Seeking Mentoring, Education (Degree, Field of Study, Graduation year, Session)

5. Reports - Editors/admins can generate and download the list of directory. They can also generate the report based on the filter criteria and download them.

**3.4 Membership Fees**

There will be fees if they are set up by the entity editor.

1. Time bound membership fee - settings to pay while registering. Also, the editor can set up a due date, when the user doesn’t pay the yearly membership fee he will get notified by email, banner ad and so on.

2. Joining fee/registration fee - any entity can setup a joining fee. A user must pay the registration fee when he registers.

3. Settings - in the settings area, editor/admin can turn on/off the joining fee and membership fee. They can also set up the amount if the fees are turned on.

4. User will be notified to pay their membership fee time to time.

**3.5 Mentoring**

The user can find mentors and offer to mentor other users.

1. Suggested mentors - an algorithm will show the users suggested mentors. It will be based on the mentees profile settings, current status, past experience, open questions etc.

2. Mentors in your area - With Google map, you can browse your nearest mentors.

4. List of mentors - show all available mentors.

5. Mentoring settings - a user can set up his mentoring settings when he registers. Also, he can do it later and customize his mentoring offer. He can set up how people will communicate – via Facebook Messenger, Skype, Google hangout, Email, Phone and In Person.

**3.6 Events**

1. Create an event - Admin and moderator can create an event. It will have an event title, description, venue, date, time, last date of registration, special notes, images etc.

2. Custom Fields - Events will have custom fields for the registration form. It will have the label of the field, form field type - dropdown, text, number, link etc. Also it will have clone option and required or not settings.

3. Event Moderation - Events created by an admin or moderator can be managed by the admin. They can edit or make changes but can not delete. They can archive an event.

4. Event Category - Also admin can update this list

a. poverty

b. Education

c. natural disaster

g. Custom Event

4. Attendance - User and organiser can see the attendance list. The organizer can export the attendance list as Docs, CSV, and PDF format. Organiser can send emails to the attendees.

5. Payment - Organizer can set up a ticket price with custom pricing. They can set up a payment option like the cash method and describe where to submit. The organizer can collect payment and add them manually. The total payment can be made public.

6. Event Dashboard:

Event List - Upcoming - Archived

i. Event Details

ii. Settings - Can join without registration or becoming a member of the platform

iii. Payment Details - Total Overview, List

iv. Attendance List

v. Event Photo Gallery

vi. Share & Invitation

**3.7 Fundraising**

Fundraising is another type of event. It will have the following functions.

1. Create - Only admin/editor can create a fundraising events. They will add an image, title description, end date for the fundraising event.

2. Notify - Based on the email & SMS preference, users will get an email & SMS of the fundraising event.

3. Fundraising Amount - There won’t be any fixed amount. The user can input the amount. A chunk of an amount like 500, 1000, 2000, 3000, 4000, 5000 and 10000 will be suggested as pill button.

4. Fund Donors List - can hide their names and amount; and anyone of it. They can also pay without login if they want.

5. Share & Invitation - there will be a user-friendly option for sharing.

6. Fundraising Dashboard:

Fundraising List - Upcoming - Archived

vii. Fundraising Details

viii. Settings - Can pay without registration or becoming a member of the platform

ix. Payment Details - Total Overview, List

x. Donor List

xi. Photo Gallery

**3.8 Settings**

1. Account - Update email, password, sync- Google, LinkedIn, Facebook. Also, there will be a delete profile option.

2. Privacy - Who can see your

a. Phone, email, location, send you a message.

b. Skype, Facebook Messenger, Google Hangouts, Google Calendar Invitations.

3. Notifications

a. Personal Activity - Message (Mobile, Email), Comment (Email, Mobile), Tag a photo, tag a post, Pending Group Members

b. General - Job Post, Event Invites & Reminders, Activity Digest, Platform Announcement, Invitation to groups.

4. Opt-in - University Updates, Donation & Fundraising emails, Invitation to events.

**3.9 Emails & SMS**

1. Emails - Organizer and Superior users can send emails to the users

a. Event

b. Donate

c. Fundraising

d. Meeting

g. Newsletters

2. SMS - All verified mobile number will get SMS based on their privacy settings for the above

happenings.

**3.10 Profile**

1. General information

a. Image

b. First Name, Last name

c. Company, Job Title

d. Industry, Job Function

e. Summary

2. Contact Information

a. Email

b. Location

c. Phone

d. Website

3. Social Media

a. Instagram URL

b. Twitter

c. Skype

d. LinkedIn

e. Messenger

f. Google URL

g. YouTube

4. Offer Help

a. Answer industry-specific questions

b. Engage/introduce contacts

c. Provide Services/expertise

10. Delete Profile

11. Update Password

**3.12 Statistics, Dashboard & Reports**

a. Dashboard with the overview

b. Statistics - More options for downloading the data will be added eventually. Here are the basics fields -

i. By Country

ii. By Degree

iii. By Company

iv. By Educational Institution

v. By Designation

vi. By Blood Group

c. Custom Reports

**3.14 Feed**

a. Feed will consist with all the current happenings

i. Recent Link Post

ii. Recent Article Post

iv. Recent Events

v. Recent Fundraising

vi. Recent Members

**4. Non-functional Requirements**

**4.1 Pricing**

Pricing will be agreed after discussion of the clients and the Fundraising management web application Executives.

**4.2 Cloud Version**

The software will be hosted on the secured Amazon cloud server. The team will continuously upgrade the features and provide technical support.

The software will be updated regularly to serve the members. More features and functionalities will be added based on the customers requirements and researches done by the Fundraising management web application team.

**5. Support**

The software will provide online support via emails and phone during the Fundraising management web application office

hours. The email, phone number and support hours are displayed on the contact page of the Fundraising management web application website

**6. Non Disclosure Agreement**

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