Donation and Donor Records System

Preview: sample pages

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Sample pages:

1. 00-START-HERE.pdf, page 1
2. 00-START-HERE.pdf, page 2
3. 00-START-HERE.pdf, page 3
4. 01 module (DOCX), page 1 (top part only)
5. 02 module (DOCX), page 1 (top part only)
6. 04 module (DOCX), page 1 (top part only)
7. 06 module (DOCX), page 1 (top part only)

Word (DOCX) pages are shown as rendered to A4 in LibreOffice; layout may vary in other editors.

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Start here Donation and donor records system

Purpose and intended users

A recurring domestic-donation office system for NGO accounts teams, treasurers, donor coordinators and authorised reviewers. It connects donor intake, ordinary receipts, reconciliation, corrections and evidence handover. It is not an FCRA ledger, a statutory filing service or a determination of donor tax eligibility.

Contents and page count

Six editable DOCX collections contain 60 distinct substantive resource pages. One macro-free XLSX workbook contains seven sheets. This guide, the licence, source notes and technical metadata are additional and are excluded from the 60-page count.

Recommended order

1. Read the source notes. Use D01-D10 to agree channels, authority, receipt wording, restrictions and privacy controls.

2. Use I01-I10 to open donor records and review actual offers or received payments. Keep pledges, uncleared cheques and unidentified credits separate from accepted donations.

3. Adapt R01-R10 for genuine receipts and donor communications. Remove internal instructions and unused alternatives before issue.

4. Use C01-C10 for reconciliation, corrections, period close and handover. Read T01-T10 with the authorised filer when preparing statutory evidence.

5. Rehearse E01-E10 in a separate workbook copy, then start with clean records.

Customisation

Replace every bracketed input with a genuine fact, verified rule or approved organisational decision. Insert your own heading and authorised signatory details. Verify actual approval wording before mentioning a tax approval. Retain original evidence, even when a local document is corrected.

File list

DOCX/01-Donation-System-Setup.docx - D01-D10; 10 pages.

DOCX/02-Donor-Intake-and-Acceptance.docx - I01-I10; 10 pages.

DOCX/03-Receipts-and-Donor-Communications.docx - R01-R10; 10 pages.

DOCX/04-Reconciliation-and-Corrections.docx - C01-C10; 10 pages.

DOCX/05-Reporting-Preparation-and-Handover.docx - T01-T10; 10 pages.

DOCX/06-Illustrative-Donation-Case.docx - E01-E10; 10 pages.

XLSX/Donation-Control-Workbook-v1.0.0.xlsx - Donors, Donations, Settlements, ReceiptIssues, FollowUp, Dashboard and Instructions.

REFERENCE/Source-and-Applicability-Notes.pdf; LICENSE.pdf; README.txt; VERSION.json; resource-index.json; validation-report.json; product-manifest.json.

Workbook setup

Enter Donors first, then accepted monetary Donations. Link each donation row to one settlement batch and compare the expected net with independent bank evidence in Settlements. ReceiptIssues records document issue events, not income. FollowUp tracks exceptions; set its B4 review date. Dashboard covers all prepared rows, including filtered-out records.

Workbook boundaries

Each register has 200 prepared rows, 9-208. Archive and start another file before exceeding capacity. Pale yellow cells are inputs and grey cells calculate. Amounts are INR. The simple settlement model assumes each row's fee and refund relate to its one batch; split settlements or later separate refunds need a reviewed allocation schedule. It is not the official upload schema.

Current forms and professional review

Use the actual reporting period and current official forms. An ordinary receipt is not an official donation certificate. Have the responsible professional review reporting, approval wording, cash acceptance, source classification, corpus/restricted treatment and unusual refunds. Use the organisation's genuine approvals and source documents; never invent identity or approval numbers.

Important statement

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Licence and compatibility

Use and adapt this version for one organisation under LICENSE.pdf; genuine completed outputs may be submitted to legitimate recipients. Source-pack resale or public distribution is not permitted. DOCX files use Arial for broad office compatibility and can reflow after editing. Keep an untouched master. The store mockup is illustrative and is not a screenshot of the workbook.

Support and version

NGG-DOC-002 | v1.0.0 | Last updated 05 October 2026. Support: contact@ngogrant.in. Publisher: LendLink Tech Private Limited (CIN U74999NL2017PTC013422, GSTIN 13AAFCV8178A1ZE), C-31, Medikhru Complex, Razhu Point, Kohima, Nagaland - 797001. Quote SKU, version and filename with a description of the issue. Do not send unnecessary confidential donor records.

Update triggers

Recheck this pack when tax law, rules, portal forms, approval conditions, source-classification guidance, privacy requirements or payment-provider settlement arrangements change. VERSION.json lists the dependencies. Future updates are included only if expressly offered at purchase.

Set up the donation desk

Editable office resource | D01

Agree this operating brief before collecting money. It assigns accountability for receiving, recording and reviewing donations so that fundraising messages, banking records and issued receipts remain consistent.

Control / record	Complete from genuine evidence
Organisation and scope	[Legal name; office; domestic donation channels covered]
Process owner	[Role; deputy; escalation contact]
Receiving authority	[Approved bank or platform; authorised collectors]

SAMPLE EXCERPT: the rest of this page is in the paid download.

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Open a donor record

Editable office resource | I01

Create one donor master record per verified donor, then connect multiple donations to that ID. A household, employer and individual should not be merged merely because contact details overlap.

Control / record	Complete from genuine evidence
Donor ID	[Stable internal ID; creation date]
Name and type	[Verified name; individual/entity]
Contact	[Necessary address/contact; preferred acknowledgement route]

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Match a bank transfer

Editable office resource | C01

Perform this check against independent bank evidence. A donor screenshot helps locate a payment but is not by itself proof of a completed credit to the organisation.

Control / record	Complete from genuine evidence
Donation reference	[ID; donor; expected amount]
Bank entry	[Account reference; value date; amount; transaction ID]
Source comparison	[Donor evidence; payer name; match basis]
Restrictions	[Accepted instruction; fund code]

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Example intake and classification

Illustrative Example | E01

Illustrative Example. All IDs, names, transactions and amounts on this page are fictional training data. They are not evidence of real donors, receipts, expenditure, approvals or filings.

[Illustrative Organisation] uses a domestic-donation training ledger. Three accepted monetary transactions will be recorded; a pending cheque and an unidentified credit remain outside that accepted-donation total until reviewed.

Reference	Fictional facts	Training treatment
D101	Donor A; bank transfer INR 10000	Accepted unrestricted contribution
D102	Donor B; platform gift INR 5000	Accepted restricted programme

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