

Donor communication and receipts

Automates donor communication and receipt generation from donation intake through follow-up messaging to strengthen donor relationships and ensure tax compliance. Streamlines the entire donor experience while maintaining detailed records for operational and tax purposes.

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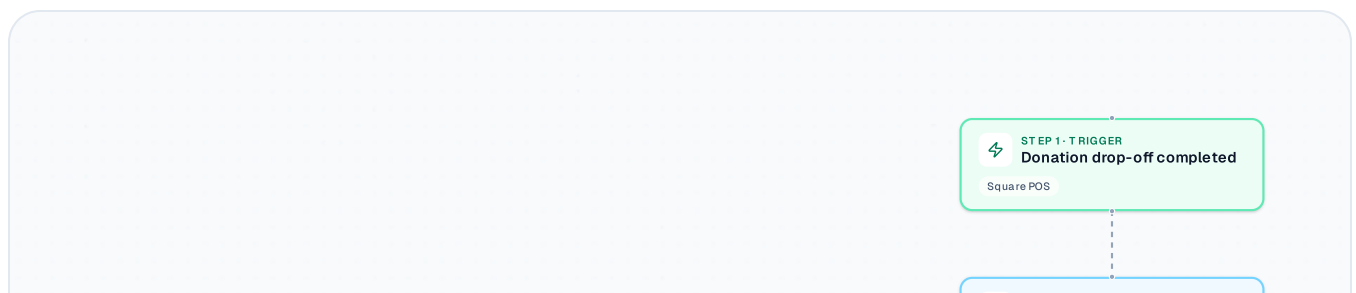


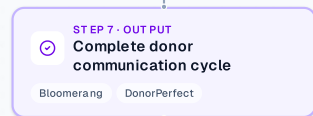
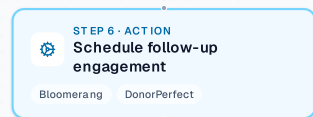
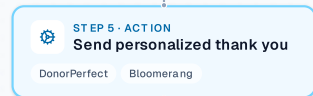
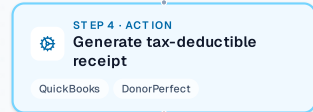
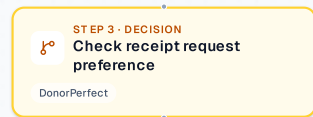
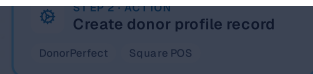
WORKFLOW TRIGGER

Donor completes donation drop-off at thrift store location

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Donation drop-off completed

Donor information and donation details are captured at the intake desk using the POS system. Basic donation inventory and donor contact information is recorded.

2

 ACTION

Create donor profile record

Donor information is automatically synced to the donor management system and a new profile is created or existing profile is updated. Donation history and preferences are maintained.

DonorPerfect

Square POS

3

 DECISION

Check receipt request preference

System determines if donor requested a tax-deductible receipt and their preferred delivery method (email, print, or mail). Routes to appropriate receipt generation process.

DonorPerfect

4

 ACTION

Generate tax-deductible receipt

Automated receipt is created with donation details, fair market value estimates, and IRS compliance language. Receipt is formatted according to donor's preferred delivery method.

QuickBooks

DonorPerfect

5

 ACTION

Send personalized thank you

Customized thank you message is sent to donor via their preferred communication channel. Message includes receipt attachment if requested and information about donation impact.

DonorPerfect

Bloomerang

6

 ACTION

Schedule follow-up engagement

Automated follow-up sequence is triggered to maintain donor relationship through newsletters, donation reminders, and special event invitations. Timeline is based on donation frequency and value.

Bloomerang

DonorPerfect

7

 OUTPUT

Complete donor communication cycle

All donor communications are logged and receipt delivery is confirmed. Donor satisfaction survey is optionally sent and next engagement touchpoint is scheduled.

Bloomerang

DonorPerfect



Outputs

- Tax-compliant donation receipt delivered

AI Business OS

- Donor profile updated with latest interaction
- Follow-up engagement sequence activated
- Donation transaction recorded in accounting system



Key Metrics

- Donor retention rate
- Receipt delivery success rate
- Average time from donation to receipt delivery
- Donor satisfaction score



Tools & Integrations

- Square POS
- DonorPerfect
- QuickBooks
- Bloomerang

AI Business OS

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