



**ZOHO** Creator

# A Non-profit's Guide

The definitive beginner's guide to custom apps for the non-profit sector.

As a person who runs a non-profit, or works for one, you would be proud to say that everything's running just fine, thank you very much. You manage to attract enough talent to volunteer, raise enough funds to fulfil your mission, and reach out to enough people to keep your organization relevant.

But wait.

What if we told you that  
there was an easier way to  
get it done?

A way to eliminate those pesky spreadsheets and printed registration forms. To give donors a common platform to make donations on. To constantly engage volunteers and make them belong. To minimize the time you spend on data entry and channel it toward interaction with your associates and stakeholders.

**Yes, we're talking about  
Zoho Creator.**

# It's everything you've been looking for, and more.

Zoho Creator specializes in creating software that gives you the power to do more with less. We describe it as a platform for powerful apps that combine simplicity and functionality into incredibly user-friendly solutions. You can choose to build your own personalized application, or pick from a range of pre-built ones from our App Deck—one way or another, it's bound to be a perfect fit for your non-profit. The best part? We're mobile-ready right from the get-go.

Let's get down to the nitty-gritty of how we can help.

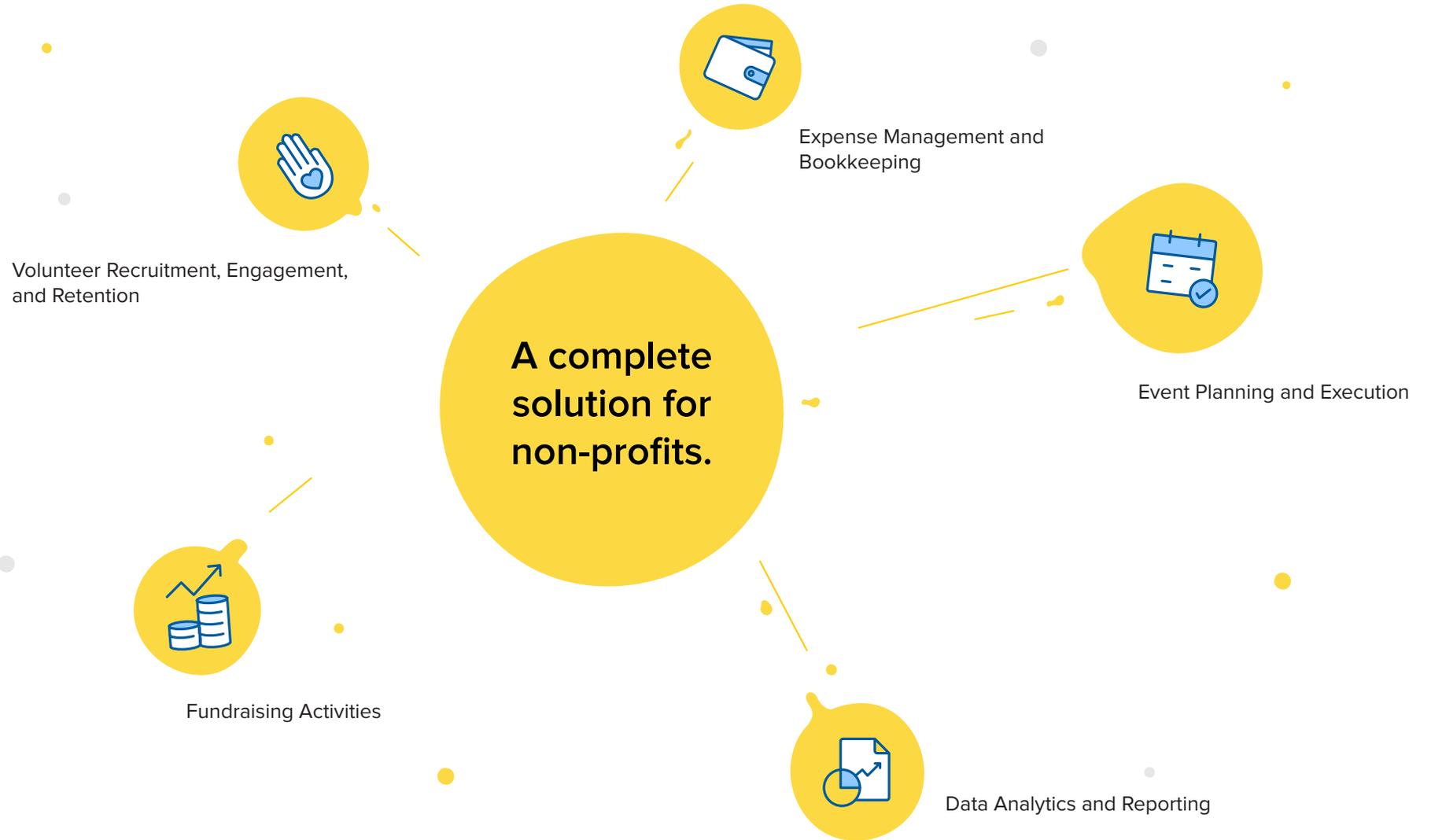




Being a low-code platform, Zoho Creator is centered around giving you the power to express-launch entire app ecosystems that can carry out your day-to-day operations. **From organizing, running, and tracking fundraisers, to recruiting new volunteers, everything's possible.**

Below, we've listed several functions common to non-profits across a range of verticals. We've also elaborated on how Zoho Creator's apps can be used to handle said functions, albeit in a simpler, and faster way.

**Take a look.**





## **Volunteer Recruitment, Engagement, and Retention.**

People are an invaluable resource. This is especially true for non-profit ventures: the more people you have, the more efficient your activities become. **Every potential volunteer has to be carefully screened, vetted, and recruited.** And that's not all. They are only as attached to the organization as the organization is attached to them. Which creates a need for another vital task – engagement.

Zoho Creator lends campaign managers a hand in this respect through advanced workflow automation.

Schedule emails to send based on flexible triggers—ranging from a person signing up to volunteer, to when a new event is scheduled to take place. Automated follow-up and newsletter emails can also be arranged, ensuring that a volunteer is always on board with what you are up to.



## **Fundraising Activities.**

The crux of any non-profit's operations. No matter how noble your goals are, fulfilling them will be an unsustainable exercise without sufficient funds. And to raise those funds, you'll have to get the word out.

Our apps have the functionality to run and manage entire campaigns, all through a single interface.

**Got a fundraiser coming up?** Automatically notify all your stakeholders via email the moment you register it within an app.

After that, give willing donors a convenient portal for them to contribute. **To make things easier, Zoho Creator integrates seamlessly with PayPal.**

You can then monitor the monetary progress of your fundraiser through real-time reports, and restrict people from donating once targets are met.





## Data Analytics and Reporting.

Analyzing past trends of metrics, such as event turnout, donation patterns, and volunteer demographics, can help you maximize your reach and impact for every campaign. Of course, you'll need easily decipherable reports to save you the trouble of perusing row after row of data on a spreadsheet.

**Reporting in Zoho Creator is completely straightforward.** If you've got data, all you need to do to is specify display preferences and click a button.

**Voila! Instant report.** Choose from a diverse collection of visual charts, and view exhaustive drill downs in the same window by clicking on different regions of the report. With Zoho Creator, you won't have to rely on IT for another annual ROI compilation ever again.



## Event Planning and Execution.

Whether it's a charity auction or gala, **proper planning can really put the fun in fundraising.** There are a ton of factors to consider. However, juggling a myriad of administrative tasks, while also keeping tabs on the numbers, could get a little out of hand.

Zoho Creator hosts a handful of features which make planning and executing events a breeze. Incorporate web forms into your registration setup to allow attendees to sign up, so you can gauge the expected turnout for the event. You can restrict sign-ups to a defined geographical location, too—setting up geo-fences takes mere seconds.

After that, **automatically send email or SMS notifications to potential attendees to ensure they don't forget to show up.** What's more, you can tweak registration forms to include referral links to get the word out.

Finally, customizable calendar-style reports ensure that planning and scheduling events never has you reaching for a diary again.



### **Expense Management and Bookkeeping.**

**Spreadsheets work. We get it. But for how long?**

Your revenue is likely to come from a number of disparate sources, in varying amounts, and at random points in time. As you keep track of your earnings, you also need to assign them to the tasks you're trying to raise funds for. And in the middle of all this, you have to account for your operational expenses. Now that's a lot of work for your average spreadsheet.



With Zoho Creator, keeping tabs on expenses is a cinch. Easily automate tasks such as revenue calculation and expense extrapolation over a set period. Issuing valid receipts to every donor doesn't have to be manual anymore, either. Simply pull up individual donors' reports, and print them out. Furthermore, integrating with a host of popular accounting software applications, like Xero, Zoho Books, and Quickbooks only takes a matter of minutes, and can be configured to work in fluid cohesion with the rest of your application.

## But that's not all.

When you pick Zoho Creator, you don't just get a platform. You gain access to an entire community of like-minded customers and developers around the world.

The **Zoho Creator Marketplace** is a repository of applications built by our customers. If a user wishes to share an app, all they need to do is get it approved by one of our experts. It can then be published and made available to the entire user base.

[EXPLORE THE MARKETPLACE](#)

The **Partner Ecosystem** is a network of Zoho-certified developers whom you can enlist to build personalized apps that perfectly synchronize with your business needs. If you're after an enterprise-grade turnkey solution, look no further.

[HIRE A CERTIFIED DEVELOPER](#)

The **App Deck** is a collection of ready-to-install applications built and tested by our in-house development team. Just browse, install, customize, and you're all set! We've built three apps in particular that cater exclusively to non-profits:



### Event Management

Plan, organize, and execute events end-to-end.



### Donor Management

Manage donations, donors, campaigns, and more.



### Volunteer Portal

Keep volunteers in the know with a comprehensive knowledge base.

[EXPLORE APP DECK](#)

# Hundreds of non-profits trust Zoho Creator.

Here's what some of our happy customers have to say...

## Center for Victims and Human Rights

📍 Indianapolis, USA

CVHR is a legal firm that handles litigations for underprivileged victims of domestic violence. Administrative staff use apps built on Zoho Creator to manage expenses and keep tabs on case proceedings.

Zoho Creator has impacted our success in a very positive way, specifically in reducing the time it takes to collect and record data, as well as making relevant data more easily accessible.



**Raio Krishnayya**

Founder and Executive Director

## Team Everest

📍 Chennai, India

Team Everest is a not-for-profit organization whose primary focus is the education of destitute children. Management handles fund tracking, HR, and student attendance, among other things, using apps built on Zoho Creator.

We were able to automate about 80% of our manual work. We've managed to build a mini NGO-specific CRM on Zoho Creator.



**Karthee Vidya**  
Founder

## About Us

At Zoho, we believe that no good deed should go unrewarded. Your objective is undeniably arduous – we'd like to lend you a hand! Zoho Creator provides you with tools that will enable you to make running the show an exceedingly elementary task. See for yourself!

[zoho.com/creator](https://zoho.com/creator)

**We'd love to talk! Reach out to us:**

[ask@zohocreator.com](mailto:ask@zohocreator.com)

