NGO & CHARITABLE TRUST SUITE

Sankalp CRM 2.0

Online Donations, Instant 80G Receipts, Compliance Vault & Donor CRM in One App.

✓ Custom Trust Branding • 12A / 80G / Form 10BD

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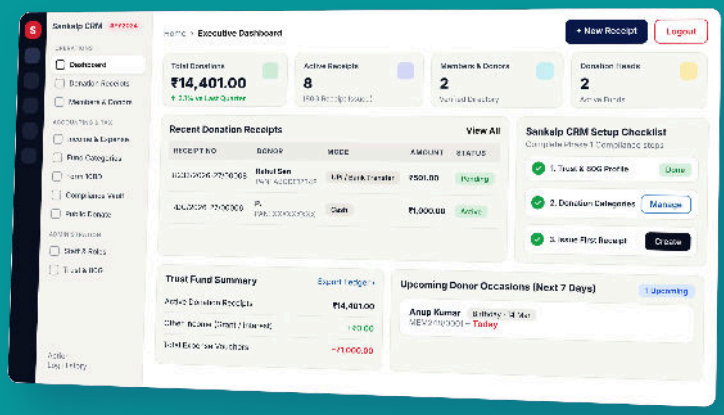

8 Modules	30 Sec	1-Click	80% Less
Unified NGO Platform	Instant 80G PDF	Form 10BD & Vault	Manual Paperwork

01. CORE APPLICATION FEATURES

Online Donate Portal (/donate)
UPI QR, Bank transfer & Razorpay / Cashfree checkout with instant PDF.

2-Track Verification NEW
Gateway payments verify instantly; UPI & Bank stay Pending until Admin approves.

Auto 80G Receipt & Email
FY auto-numbered PDFs with logo, signature, auto-email & ₹2,000 cash rule.

Compliance Doc Vault
Store & download 12A, 80G, PAN, Deed, Cheque & QR with expiry alerts.

1-Click Form 10BD Export
CA-ready CSV export with PAN checks, cash limit & verified-only filtering.

Donor & Member CRM
Auto-linked donor profiles, CSV import, Member IDs, certificates & donation history.

Occasion Alerts & WhatsApp
7-day Birthday, Anniversary & Tithi alerts with pre-filled WhatsApp wishes.

Income & Expense Ledger
Category-wise tracking, verified Net Balance & Admin/Staff permissions.

02. HOW IT WORKS (ZERO MANUAL RE-ENTRY)

01 — Setup & Vault
Add Trust info, logo & 12A/80G docs.

02 — Collect Funds
Online via /donate or at office desk.

03 — Auto 80G PDF
Instant receipt, email & live ledger.

04 — Retain & File
WhatsApp wishes & Form 10BD export.

03. MANUAL WORK VS. SANKALP CRM

Task	Paper / Excel	With Sankalp CRM
80G Receipts	Handwritten books & delays	✓ **Instant auto-numbered PDF + Email**
UPI & Bank Proof	Chasing screenshots	✓ **Auto-linked UTR & 1-click Admin approval**
Online Checkout	Separate links & manual entry	✓ **Razorpay & Cashfree auto-receipts**
12A / 80G / QR Docs	Searching old emails & folders	✓ **1-click Vault download + expiry alerts**
Donor Greetings	Missed birthdays & anniversaries	✓ **7-day dashboard alerts + 1-click WhatsApp**
Form 10BD Filing	Days of manual PAN tallying	✓ **1-click validated CSV export**
Fund & Staff Control	Unprotected shared spreadsheets	✓ **Verified Net Balance & Admin/ Staff roles**

04. BUILT FOR YOUR ENTIRE TEAM

★ Trustees & Founders

24/7 live fund visibility, zero receipt tampering & active 12A/ 80G compliance tracking.

★ Office Coordinators

80% less paperwork with automated emails, 1-click approvals, Vault downloads & WhatsApp tools.

★ Chartered Accountants

Clean FY numbering, structured PAN records, cash-limit checks & 1-click Form 10BD export.

★ Donors & CSR Partners

30-second online giving, instant 80G tax PDFs & quick certificate verification.

Launch Your Trust's Digital Workspace Today

Cloud-Hosted • Mobile & Desktop Ready • Setup with Your Trust Logo, Signature & Payment Gateway

SANKALP CRM 2.0 – PRICE QUOTATION

NGO & Charitable Trust Management Suite

An all-in-one digital workspace designed to help NGOs and charitable trusts manage donations, donor records, 80G receipts, compliance documents and financial tracking.

PACKAGE INCLUDES

01	**Online Donation Portal** UPI, bank transfer, Razorpay and Cashfree checkout.
02	**Automatic 80G Receipt & Email** FY auto-numbered PDF receipts with logo, signature and email delivery.
03	**Two-Track Payment Verification** Gateway payments verified instantly; UPI and bank payments remain pending until admin approval.
04	**Compliance Document Vault** Store and download 12A, 80G, PAN, deed, cheque and QR documents with expiry alerts.
05	**One-Click Form 10BD Export** CA-ready CSV export with PAN checks, cash-limit and verified-only filtering.
06	**Donor & Member CRM** Donor profiles, CSV import, Member IDs, member certificates and donation history.
07	**Occasion Alerts & WhatsApp** Birthday, anniversary and Tithi alerts with pre-filled WhatsApp wishes.
08	**Income & Expense Ledger** Category-wise tracking, verified net balance and admin/staff permissions.

PRICE SUMMARY

Description	Amount
Sankalp CRM – Complete Package	₹ 18,000
GST (18%)	₹ 3,240
GRAND TOTAL (INCLUDING GST)	**₹ 21,240**

PROJECT TIMELINE
7–10 Days
From confirmation and receipt of required information and materials.

PAYMENT TERMS
2 Instalments
First instalment: ₹ 10,620 (50%)
Second instalment: ₹ 10,620 (50%)

IMPORTANT NOTE

Any additional customised design, special features, modifications or other work outside the scope of the Sankalp CRM package described above will be chargeable separately.