

Turn every community signal into the next best action.

One ordinary day at a disease or research foundation, followed across peer-to-peer events, tribute giving, families and community, stewardship, major gifts, and finance on one constituent record.

Support for a cause arrives as signals.

A team captain who raises more every year. A memorial gift with a name attached. A sponsor who also rides. Today those signals reach the fundraising team late, or never reach the record at all. This map follows one day with every signal landing on one record, so the next step is chosen with the whole story in view. It uses roles, not people: no participant, family, or health detail belongs in a workflow map, and none appears here.

How to read this map. Eight stations follow one working day. Each shows what happens, where context gets lost in a stitched-together stack, and what changes when every signal lands on one constituent record. Colored markers say which part of Ignite is doing the work, when an AI teammate has drafted something, and when a person decides.

MARKERS

- RECORD** Ignite CRM: the constituent record
- FUNDRAISING** Ignite Fundraising: gifts, drives, appeals
- ENGAGEMENT** Ignite Engagement: volunteers and events
- FINANCE** Ignite Finance: batches, funds, ledger extract
- AI TEAMMATE** An agent researched or drafted this. It waits for review.
- YOUR CALL** A person approves before anything sends or posts.

THE CAST (ROLES, NOT PEOPLE)

- Development Director
- Events and Peer-to-Peer Manager
- Donor Relations Manager
- Major Gifts Officer
- Finance Director
- Executive Director

Morning to midday

The day, station by station. Each card shows what happens, where context gets lost today, and what changes when every signal lands on one record.

7:15 a.m.

Weekend registrations and team pages are already on the record.

Saturday's community ride opened registration last week. Overnight, participants registered, joined teams, and their first gifts arrived through team pages.

WHERE CONTEXT GETS LOST TODAY

The peer-to-peer platform knows the participant. The CRM knows last year's donor. They are often the same person, connected months later by a CSV.

ON ONE RECORD

- Registration and team fundraising land on the participant's record with live team totals.
- A returning participant is matched on the details already on file. Duplicates merge with an audit trail and a 30-day reversal.
- The Events Manager sees team totals at 7:15, not after the export.

● FUNDRAISING ● RECORD
● ENGAGEMENT

8:30 a.m.

A memorial gift arrives with a name attached.

A gift arrives in memory of a loved one, with the honoree named and a family to notify.

WHERE CONTEXT GETS LOST TODAY

The tribute detail sits in a payment note. The family hears nothing, or hears late, and the giver's record never explains why they gave.

ON ONE RECORD

- Honor and memorial gifts are real gift types. The honoree and the reason stay on the giver's record.
- Once the gift posts, the acknowledgement is ready in the receipting run. The Donor Relations Manager previews it before it goes out.
- Sending the receipt completes the matching stewardship milestone.

● FUNDRAISING ● FINANCE

10:00 a.m.

A signal becomes a next step.

A team captain has raised more in each of the last three rides, gives monthly, and sponsored a table at the gala. Major Gift surfaces a reviewed next step and drafts the note. Prospect Research prepares a sourced brief from the live record.

WHERE CONTEXT GETS LOST TODAY

The captain is a strong event fundraiser in one system and a mid-level donor in another. Nobody sees the whole pattern until a board member mentions them.

ON ONE RECORD

- Rides, gifts, sponsorship, and years of history read as one relationship.
- Major Gift proposes the next step. The Major Gifts Officer accepts, edits, or declines it.
- The opportunity moves only when the Officer moves it. Posting a gift never changes its stage.

● RECORD ● AI TEAMMATE
● FUNDRAISING

12:30 p.m.

A staff question, answered from the record.

The Development Director asks Constituent Support which of this year's ride teams include donors who also made tribute gifts.

WHERE CONTEXT GETS LOST TODAY

The question goes to the one person who knows the database, and the answer arrives Thursday.

ON ONE RECORD

- Constituent Support answers from live records, with the records behind the answer.
- It is a staff tool that reads your live data, not a public chatbot.
- The Director turns the answer into a segment for the fall appeal.

● AI TEAMMATE ● RECORD
● YOUR CALL

Afternoon to board night

The day continues. Every draft waits for a person; every posted gift reaches finance without re-entry.

2:00 p.m.

A restricted research gift is recorded correctly the first time.

A family foundation gives to a named research fund through its donor-advised fund sponsor.

WHERE CONTEXT GETS LOST TODAY

The restriction is in the cover letter. Finance learns about it at close, and the record credits the DAF sponsor instead of the family.

ON ONE RECORD

- Campaign is required on every gift. The fund designation and restriction are recorded at entry.
- The DAF sponsor is the third-party payor. The family keeps full giving credit; the sponsor carries the tax credit.
- Fund and restriction views in Finance follow the FASB ASU 2016-14 categories.

● FUNDRAISING ● FINANCE

4:30 p.m.

Stewardship runs on the record, not on memory.

Retention flags event donors whose giving pattern points to lapse risk. The Donor Relations Manager reviews the drafted outreach and checks the stewardship milestones for last quarter's major gifts.

WHERE CONTEXT GETS LOST TODAY

Stewardship lives in a spreadsheet of promises. The lapsing event donor is discovered in next year's attrition report.

ON ONE RECORD

- Retention watches event and monthly donors at risk of lapsing and drafts the outreach.
- Drafts wait for review. The Manager edits, approves, or declines, and nothing goes out until a person sends it.
- Milestones complete as receipts send; the open ones stay visible on the record.

● AI TEAMMATE ● YOUR CALL
● FINANCE

5:30 p.m.

The batch posts, balanced.

Finance posts the day's batch: ride gifts, the memorial gift, and the research gift. Posting creates the journal entries.

WHERE CONTEXT GETS LOST TODAY

Gifts are re-keyed from the peer-to-peer export and the payment tool into accounting, and the fund totals never quite match.

ON ONE RECORD

- Journals are created at batch post and are double-entry balanced by rule. An unbalanced batch is rejected.
- Posting a linked gift raises a payment-received alert for the fundraiser and updates the amount received on the opportunity.
- The GL extract exports as a QuickBooks Online or Business Central file, formatted for import. Your accounting system stays the ledger of record.

● FINANCE ● FUNDRAISING

Board night

Progress toward the goal, not a year-end recap.

The Executive Director opens the dashboard: campaign progress, event totals, fund balances, and retention, all from the same record the team worked in today.

WHERE CONTEXT GETS LOST TODAY

Progress is assembled from three exports the week before the meeting.

ON ONE RECORD

- KPI dashboards read live data, so the board's number is the number finance posted.
- Trial balance with a server-side debits-equal-credits check.
- Agent drafts and the decisions made on them land in the audit trail beside the day's work.

● RECORD ● FINANCE
● YOUR CALL

— WHERE THE STACK BREAKS

Five handoffs where context gets lost

HANDOFF	TODAY, ACROSS SYSTEMS	ON ONE RECORD
Participant to donor	Connected months later by a peer-to-peer export.	● Registration, team pages, and gifts on one record from day one.
Tribute gift to family	A name in a payment note; the family hears late.	● Honoree on the record; acknowledgement reviewed and sent.
Event signal to major gift	Seen by chance, if a board member mentions the name.	● Major Gift surfaces a reviewed next step from the whole history.
Restricted gift to fund	The restriction lives in a cover letter until close.	● Recorded at entry and carried into Finance with FASB views.
Batch to ledger	Re-keyed from two exports into accounting.	● Balanced journals at post; GL extract formatted for import.

Development

- A live picture of every supporter, from tribute donors to major gifts
- Major Gift surfaces the next step with each prospect and drafts it
- A sourced brief before every major-gift and funder meeting
- Campaign and appeal results in real time, not at year end

Events and Community

- Peer-to-peer walks, rides, and runs with team pages and live totals
- Participants, sponsors, and volunteers on the same record as giving
- Constituent Support answers staff questions from live records, with the records behind the answer

Finance and Leadership

- Gifts traced from tribute or event to the GL extract
- Restricted research funds recorded at entry with FASB views
- Progress dashboards ready for the board and for funders
- Role-based access and agent controls administered in one platform

What this map claims, and what it does not

Agents research and draft. Writes follow the approval gates your team configures, and every action lands in the audit trail.

Ignite Finance is the fundraising subledger. The GL extract produces QuickBooks Online and Business Central files formatted for import. It is not a live accounting connector, and your accounting system remains the general ledger of record.

Receipts and acknowledgements generate for posted transactions. Staff start the run.

Roles, not people. This map names no participant, family, or health detail, and your working session uses realistic sample data, never your constituents.

AI teammates are included in every Ignite subscription.

Bring the workflow your team cannot afford to break.

Pick one path. In 30 minutes we map the starting information, the team handoffs, the approval points, and the finished result, then show the same path in Ignite with realistic data.

Participant to prospect

A ride captain whose pattern becomes a reviewed major-gift next step.

Memorial gift to acknowledgement

A tribute gift, the honoree on the record, and a reviewed note to the family.

Restricted research gift to ledger

A foundation gift with a restriction, from entry to the GL extract.

[Book a working session →](#)

Larger or multi-entity organizations are routed to the appropriate Enterprise review.