

From community action to a clean ledger.

One ordinary day at a food bank or human-services organization, followed across donors, volunteers, drives, events, restricted funds, and finance on one constituent record.

The person sorting cans on Saturday is also a donor.

Food banks rarely have a donor-only relationship. The same person is a monthly sustainer, a drive captain, a shift volunteer, and a dinner guest. Today those signals live in three or four systems, and staff rebuild the relationship by hand before they can act. This map follows one day with every signal landing on one record, so the work starts with context instead of reconciliation.

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

Volunteer and Programs Manager

Drives and Events Coordinator

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.

7:30 a.m.

Overnight gifts and drive results are already on the record.

Online gifts from the fall appeal and last night's peer-to-peer drive pages arrived overnight through Stripe or PayPal. Each gift landed on the giver's record with its campaign attached.

WHERE CONTEXT GETS LOST TODAY

Gifts sit in the payment tool until someone exports them. Drive totals are stitched together in a spreadsheet, and the people behind them are keyed in later, if at all.

ON ONE RECORD

- Every gift carries a campaign, so appeal and drive results are live at 7:30, not at month end.
- Retention has flagged two monthly sustainers whose giving pattern points to lapse risk, with outreach drafted for review.
- The Development Director edits one draft, declines the other, and both decisions are logged.

● FUNDRAISING

● AI TEAMMATE

● YOUR CALL

9:00 a.m.

A corporate partner meeting, prepared before the coffee.

The Development Director meets a regional grocery chain about renewing its food-drive sponsorship. Prospect Research has prepared a sourced brief from the live record: giving history, last year's corporate volunteer day, and the drive its stores ran.

WHERE CONTEXT GETS LOST TODAY

The partner's gifts, the volunteer day, and the drive live in three systems. Someone spends an evening assembling the story, or walks in without it.

ON ONE RECORD

- One brief, built from one record, with the records behind it.
- Giving, volunteering, and sponsorship read as one relationship.
- The Director cuts a paragraph and adds a question of their own before the meeting.

● AI TEAMMATE

● RECORD

● YOUR CALL

10:30 a.m.

The Saturday sort shift fills.

The Community Volunteer Center posts Saturday's warehouse shift. A company books a volunteer day and individuals sign up. One signup arrives from someone whose email is already on a donor record; it lands on that record, and the hours will too.

WHERE CONTEXT GETS LOST TODAY

Volunteer software knows the shift. The CRM knows the gift. Nobody knows they are the same person, so the thank-you never mentions the shift and the ask never mentions the gift.

ON ONE RECORD

- Shifts, signups, and hours on the same record as giving.
- Duplicates are found and merged with an audit trail and a 30-day reversal.
- The Volunteer Manager asks Constituent Support which of the company's employees volunteered this year and gets the answer with the records behind it.

● ENGAGEMENT

● RECORD

● AI TEAMMATE

12:15 p.m.

A food drive and a fund drive, one view of results.

A local employer runs a canned-food drive while its employees run a fund drive on peer-to-peer pages. The sponsor, the volunteers who staffed the collection, and the givers all belong to the same campaign.

WHERE CONTEXT GETS LOST TODAY

The food drive is a note in the warehouse system. The fund drive is a page in the peer-to-peer tool. The sponsor gets two thank-yous from two people, or none.

ON ONE RECORD

- The drive is a campaign with a sponsor, volunteers, and gifts attached. Pounds stay in your inventory system; the people land here.
- Peer-to-peer pages land gifts on each giver's record with live totals.
- The Coordinator sees both drives in one view, without an export.

● FUNDRAISING

● RECORD

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 grant gift arrives.

A family foundation sends a gift restricted to the mobile pantry program, paid through its donor-advised fund sponsor.

WHERE CONTEXT GETS LOST TODAY

The restriction lives in an email. Finance learns about it at month end, the fund is corrected after the fact, and the record shows a gift from 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 recorded as the third-party payor. The foundation keeps full giving credit; the sponsor carries the tax credit.
- Receipt eligibility and the acknowledgement track follow from the payor type.

● FUNDRAISING ● FINANCE

4:00 p.m.

The harvest dinner sells its last table.

Registration for the fall fundraising dinner closes. Table sponsors, guests, and the in-kind donors behind the evening all register onto their constituent records.

WHERE CONTEXT GETS LOST TODAY

The event tool has the guest list. The CRM has the donors. After the event, someone matches names by hand and the follow-up goes out weeks late.

ON ONE RECORD

- Registration lands on the constituent record; attendees are matched on the details already on file.
- Sponsorship, attendance, and giving read as one relationship.
- Major Gift surfaces a reviewed next step for the sponsor whose giving has grown three years running.

● ENGAGEMENT ● RECORD
● AI TEAMMATE

5:30 p.m.

The batch posts, balanced.

Finance posts the day's gift batch: online gifts, the foundation gift, and the dinner sponsorships. Posting creates the journal entries.

WHERE CONTEXT GETS LOST TODAY

Gifts are re-keyed from three exports into the accounting system. Fundraising and finance disagree on the total, and the disagreement is settled in a meeting.

ON ONE RECORD

- Journals are created at batch post and are double-entry balanced by rule. An unbalanced batch is rejected.
- Fund and restriction views follow the FASB ASU 2016-14 categories.
- The GL extract exports as a QuickBooks Online or Business Central file, formatted for import. Your accounting system stays the ledger of record.

● FINANCE

Month end

One answer to "what did we raise?"

The Finance Director runs the trial balance. The Executive Director opens the KPI dashboard for the board packet.

WHERE CONTEXT GETS LOST TODAY

The board number comes from a re-exported spreadsheet that finance has not seen. Two numbers, one awkward question.

ON ONE RECORD

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

● FINANCE ● RECORD
● YOUR CALL

— WHERE THE STACK BREAKS

Five handoffs where context gets lost

HANDOFF	TODAY, ACROSS SYSTEMS	ON ONE RECORD
Gift to record	Exported from the payment tool and keyed in later.	● Posts to the giver's record with the campaign attached.
Volunteer to donor	Two systems, two people, one relationship nobody sees whole.	● One record. Hours beside gifts, shifts beside appeals.
Drive to sponsor	Totals in a spreadsheet; the sponsor thanked twice or never.	● A campaign with the sponsor, volunteers, and gifts attached.
Restricted gift to fund	The restriction lives in an email until month end.	● Recorded at entry and carried into Finance with FASB views.
Batch to ledger	Re-keyed from three exports into accounting.	● Balanced journals at post; GL extract formatted for import.

Development

- A live picture of every donor, from monthly gifts to volunteer shifts
- Retention flags at-risk sustainers and drafts the outreach
- A sourced brief before every corporate partner meeting
- Drive and appeal results in real time, not at month end

Volunteers and Programs

- Shifts, events, and signups on the same record as giving
- Corporate volunteer days and individual signups through the Community Volunteer Center
- Constituent Support answers staff questions from live records, with the records behind the answer

Finance and Leadership

- Every gift traceable from batch to GL extract
- Fund and restriction views that fundraising and finance both read
- Board dashboards built from live records
- 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.

Food inventory, pounds, and distribution reporting stay in your inventory system. This map covers the people and the money.

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Volunteer to record

A drive volunteer who becomes a sustainer, on one record from the first shift.

Restricted gift to ledger

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

Partner across the relationship

A corporate partner's giving, volunteering, and sponsorship as one story.

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