Klarstig

# Customer Service Donation Tracking

**FICTIONAL EXAMPLE FOR ILLUSTRATION. NAMES, ADDRESSES AND NUMBERS ARE INVENTED.**

Record a progress update for the specified activity or record. Use a consistent reference so later updates can be compared.

## Contact and reference

**Organization using this document**
Maple Street Community Center

**Your name or contact reference ***
Alex Rivera

**Email for a reply if needed**
alex.rivera@example.com

## Information for this document

**Record or activity reference ***
REF-2026-0143

**Update date ***
November 14, 2026

**Responsible person or team ***
Operations

**Current status ***
Not started

**Progress since the last update ***
(Free-text answer - not filled in for this example)

**Blockers or outstanding items**
Two boxes of children's winter coats (sizes 4-10) and three unopened packs of socks.

**Next action and target date**
Replaced the faulty door latch on 14 November; next review of the entrance checklist is due 1 December.

## Specific details

**Gift campaign or donor reference**
Complete when relevant to this request.
REF-2026-0150

### Gift status restrictions and acknowledgment already provided

(Free-text answer - not filled in for this example)

## Operating context

### Organization branch or team concerned

Complete when relevant to this request.

Maple Street Community Center

### Local requirements and constraints relevant to this document

(Free-text answer - not filled in for this example)

## Team specific details

### Customer service team queue or case reference

Complete when relevant to this request.

Operations

### Response expectations escalation route and customer handover needs

(Free-text answer - not filled in for this example)

## Limitations and what needs setup

- Submitting the form records the answers in your workspace. It does not approve, schedule, charge or reply on its own unless you add that step to the workflow.
- Email notifications, approval routing, document generation and connections to other systems are available but not switched on until you configure them.

### Want help tailoring this form? Free, Starter and Pro include five personal setup sessions, up to 30 minutes each, per new organization.

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