

# CharityConnect CRM – Donor Transparency & Engagement Platform

## Phase 1: Problem Understanding & Industry Analysis

**Industry:** Non-Profit / Charity (Crowdfunding & Donations)

**Project Type:** Salesforce CRM Implementation (Admin + Developer)

**Target Users:** Donors, NGO Staff/Admins, Beneficiaries

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## Problem Statement

Non-profits struggle to build trust and engage donors due to:

- Scattered donation records in Excel/Sheets.
- Limited visibility into how donations are utilized.
- No reward system for recurring or loyal donors.
- Manual effort in sending updates, receipts, and impact reports.

This leads to **low donor retention, inefficiency, and declining trust.**

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## Goal

Develop a Salesforce-based platform that:

- Centralizes donors, donations, campaigns, and beneficiaries.
- Provides **real-time donation tracking and impact reports.**
- Introduces **innovative engagement features** (Smart Cart, Loyalty Points, Badges, Forecasting).
- Automates thank-you emails, festive donation drives, and reminders.

- Enhances transparency through dashboards and donor profiles.
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## Requirement Gathering

### Business Needs

- Centralized platform for NGO staff and donors.
- Automated donation tracking + communication.
- Gamification features to retain donor interest.
- Impact-driven dashboards for staff and donors.

### Functional Requirements

- **Donor Object** → details, donation history, loyalty points.
  - **Campaign Object** → fundraising goals, progress.
  - **Beneficiary Object** → supported communities/individuals.
  - **Donation Object** → links Donor → Campaign → Beneficiary.
  - **Smart Donor Cart** → select multiple campaigns, auto-total.
  - **Donor Loyalty Points & Badges** → points for each donation, auto-badges via automation.
  - **Impact Forecasting** → formulas & dashboard to show future impact.
  - **Festive Campaign Triggers** → seasonal auto-reminders.
- 

### Non-Functional Requirements

- Mobile-friendly via Salesforce app.
  - Role-based access (Donor, NGO Staff, Admin).
  - Scalable for thousands of donors.
  - Easy UI using Lightning App Builder + LWCs.
-

# Stakeholder Analysis

Stakeholder	Needs / Responsibilities
Donors	Donate easily, see real-time impact, earn rewards (points & badges), forecast future impact.
NGO Staff	Create/manage campaigns, track donations, run festive drives, update beneficiaries.
Beneficiaries	Receive support, provide updates, connect transparently with donors.
Admin	Manage setup, security, permissions, and ensure compliance.

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## Business Process Mapping

### Current Manual Process

- Donations recorded in Excel.
- Donors informed via manual email/WhatsApp.
- Reports created monthly with delays.
- No systematic loyalty/reward tracking.

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### Proposed Salesforce Process

1. Donor selects multiple campaigns → added to **Impact Cart**.
2. Total donation auto-calculates → stored as Donation record(s).
3. **Thank-you email** sent automatically.
4. Recurring reminders + festive campaign appeals triggered by Flow.
5. Donor earns **Loyalty Points** → when thresholds met, **Badges auto-assigned**.
6. **Impact Forecasting** shows how future pledges translate into meals/benefits.

7. Dashboards auto-refresh to show real-time donor & campaign performance.
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## Industry-Specific Use Cases

- **Smart Donor Cart** → e-commerce-like donation experience.
  - **Donation Transparency Dashboard** → live usage of funds.
  - **Gamification with Loyalty Points & Badges** → motivates donors.
  - **Impact Forecasting** → future impact visualization.
  - **Festive Campaign Triggers** → seasonal drives like “This Diwali, sponsor a meal.”
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## AppExchange Exploration

- **Nonprofit Success Pack (NPSP)**: Base framework for NGO donation tracking.
  - **Conga Composer**: Auto-generate donation receipts.
  - **FormAssembly**: Custom donor registration forms.
  - **SurveyMonkey**: Collect donor feedback post-campaign.
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# Phase 2: Org Setup & Configuration

## Salesforce Edition

- Sign up for a **Developer Edition Org.**
  - Log in with your login credentials.
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## Company Profile Setup

- Company Name: CharityConnect NGO
  - Currency: INR
  - Time Zone: Asia/Kolkata (IST)
  - Address and contact details configured.
- 

## Business Hours & Holidays

- Standard business hours: Monday–Friday, 9 AM – 6 PM IST;  
Saturday–Sunday, 10 AM – 3 PM IST.
  - Holidays configured: Diwali, Christmas, Independence Day.
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## Fiscal Year Settings

- Standard Fiscal Year: April – March.
- 

## User Setup & Licenses

- System Administrator (Admin User)
  - NGO Staff User
  - Donor User
- 

## Profiles

- System Administrator (default)
  - NGO Staff Profile (customized from Standard User)
  - Donor Profile (customized with limited access)
-

## Roles

- Admin
  - NGO Manager
  - NGO Staff
  - Donor
- 

## Permission Sets

- Donor Dashboard Access
  - NGO Advanced Reporting
- 

## Organization-Wide Defaults (OWD)

- Donations: Private
  - Donors: Private
  - Campaigns: Public Read Only
  - Beneficiaries: Public Read Only
- 

## Sharing Rules

- NGO Staff access to team donations
  - Donors restricted to their own donations only
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## Login Access Policies

- Enabled for troubleshooting and admin support
-

## Dev Org Setup

- Developer Org created and configured for the project
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## Sandbox Usage

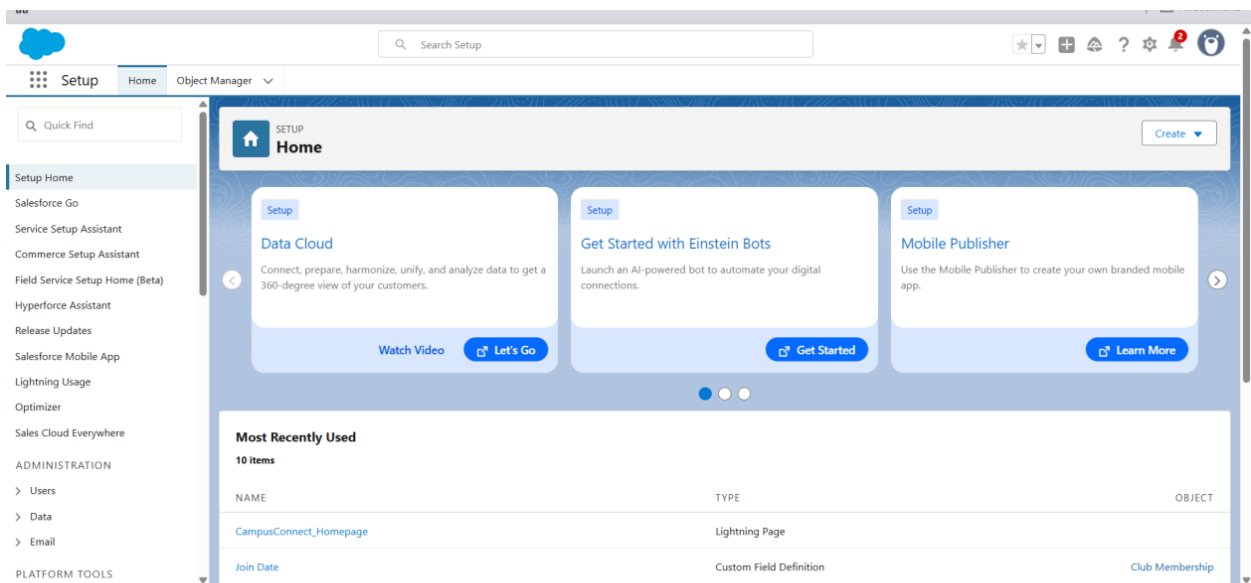
- Not applicable (Developer Edition)
  - Simulated via secondary Developer Org if required
- 

## Deployment Basics

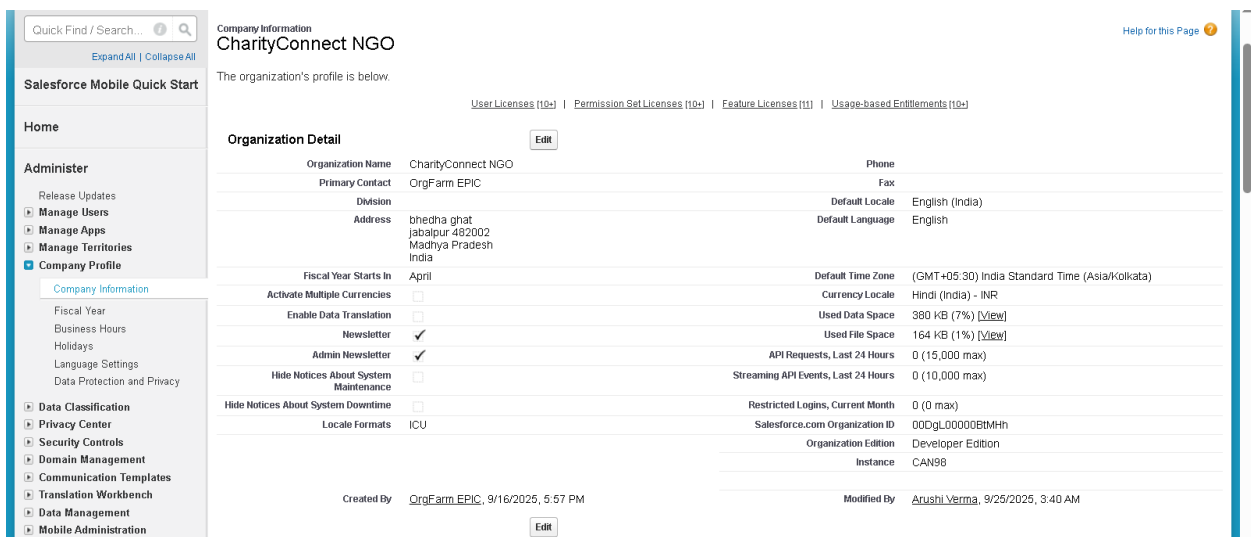
- Change Sets identified as the primary deployment method
- Awareness of ANT Migration Tool and SFDX for advanced deployments

# Screenshots:

## Developer Org Setup



## Company Profile Setup



## Business Hours & Holidays



# Organization Business Hours

Help for this Page

« Back to List: Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

Holidays (0)

## Business Hours Detail

Edit

Business Hours Name	Standard Business Hours	Time Zone
Business Hours	<div><div>Sunday</div><div>Monday</div><div>Tuesday</div><div>Wednesday</div><div>Thursday</div><div>Friday</div><div>Saturday</div></div> <div><div>10:00 AM to 3:00 PM</div><div>9:00 AM to 6:00 PM</div><div>9:00 AM to 6:00 PM</div><div>9:00 AM to 6:00 PM</div><div>9:00 AM to 6:00 PM</div><div>9:00 AM to 6:00 PM</div><div>10:00 AM to 3:00 PM</div></div>	(GMT+05:30) India Standard Time (Asia/Kolkata)
	Default Business Hours	✓

Active



Created By Arushi Verma 9/21/2025, 11:37 PM

Last Modified By Arushi Verma 9/21/2025, 11:37 PM

Edit

Quick Find / Search...

Expand All | Collapse All

Salesforce Mobile Quick Start

Home

Administer

Release Updates

Manage Users

Manage Apps

Manage Territories

Company Profile

Company Information

Fiscal Year

Business Hours

Holidays

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.

New

Action	Holiday Name	Description	Date and Time
Edit   Del	Christmas	day Jesus was born	12/25/2025 All Day

Elapsed Holidays

Action	Holiday Name	Description	Date and Time
Clone	Diwali	a festival of light	9/21/2025 All Day
Clone	Independence Day	day when India was independent.	9/21/2025 All Day

# Fiscal Year Settings

Quick Find / Search...

Expand All | Collapse All

Salesforce Mobile Quick Start

Home

Administer

Release Updates

Manage Users

Manage Apps

Manage Territories

Company Profile

Company Information

Fiscal Year

Business Hours

Holidays

Language Settings

Data Protection and Privacy

Setup

Organization Fiscal Year Edit: CharityConnect NGO

To specify the fiscal year type for your organization, choose one of the options below.

Standard Fiscal Year

Custom Fiscal Year

Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

Change Fiscal Year Period

Name

CharityConnect NGO

Fiscal Year Start Month

April

Fiscal Year is Based On

The ending month

The starting month

Save

Cancel

# Profiles

Quick Find / Search...

Expand All | Collapse All

Salesforce Mobile Quick Start

Home

Administrator

Release UpdatesManage UsersUsersMass Email UsersRolesPermission SetsPermission Set GroupsUser Management SettingsProfilesPublic GroupsQueuesLogin HistoryIdentity Provider Event LogIdentity Verification History

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Del...	B2B Reordering Portal Buyer Profile	External Apps Login	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del...	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del...	Read Only	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del...	Custom Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del...	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del...	Custom Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del...	NGO Staff Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del...	Donor Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	System Administrator	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	External Appointments User	External Appointments User	<input type="checkbox"/>

Page 1 of 2

## Roles

Quick Find / Search...

Expand All | Collapse All

Salesforce Mobile Quick Start

Home

Administrator

Release UpdatesManage UsersUsersMass Email UsersRolesPermission SetsPermission Set GroupsUser Management SettingsProfilesPublic Groups

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Show in tree view

Collapse All | Expand All

CharityConnect NGO

Add Role

CEO

Edit | Del | Assign

Add Role

System Administrator

Edit | Del | Assign

Add Role

NGO Manager

Edit | Del | Assign

Add Role

NGO Staff

Edit | Del | Assign

Add Role

Donor

Edit | Del | Assign

Add Role

## Permission Sets

Quick Find / Search...

Expand All | Collapse All

Salesforce Mobile Quick Start

Home

Administrator

Release UpdatesManage UsersUsersMass Email UsersRolesPermission SetsPermission Set GroupsUser Management SettingsProfilesPublic Groups

Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets | Edit | Delete | Create New View

New

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Permission Set Name	Description	License
<input type="checkbox"/> Del   Clone	NGO Advanced Reporting	NGO Advanced Reporting	Salesforce

Quick Find / Search...

Expand All | Collapse All

Salesforce Mobile Quick Start

Home

Administrator

Release UpdatesManage UsersUsersMass Email UsersRolesPermission SetsPermission Set GroupsUser Management SettingsProfilesPublic Groups

Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets | Edit | Delete | Create New View

New

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Permission Set Name	Description	License
<input type="checkbox"/> Clone	DCToDCSharingSetupC2CPermSet		Cloud Integration User
<input type="checkbox"/> Clone	Data Cloud Admin	Allows access to Data Cloud Setup if the user is...	Customer Data Platform
<input type="checkbox"/> Clone	Data Cloud Architect	Allows access to Data Cloud Setup if the user is...	Data Cloud
<input type="checkbox"/> Clone	Data Cloud Home Org Integration User	Allows integration user to access entities specifi...	Cloud Integration User
<input type="checkbox"/> Clone	DeliveryEstimationServicePermSet		Cloud Integration User
<input type="checkbox"/> Clone	Developer Edition	Permission to view the Developer Edition app.	Salesforce
<input type="checkbox"/> Del   Clone	Donor Dashboard Access		Salesforce

# Phase 3: Data Modeling & Relationships

## Standard Objects Used

- **User** → Represents NGO staff, donors (if given portal access), and admins.
  - **Campaign** → Used to manage fundraising initiatives (e.g., Education Drive, Healthcare Relief).
  - **Contact (extended for Donors)** → Acts as the base for donor information, extended with custom fields.
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## Custom Objects Created

1. **Donor**
    - Stores additional donor details beyond Contact.
    - Key Fields: Donor ID (Auto-Number), Loyalty Points, Preferred Cause, Total Contributions, Badge Status.
  2. **Donation**
    - Tracks all individual donations.
    - Key Fields: Donation ID, Amount, Date, Mode of Payment, Status (Pending/Completed/Failed).
    - Relationships: Linked to Donor, Campaign, and Beneficiary.
  3. **Beneficiary**
    - Represents individuals or communities supported.
    - Key Fields: Beneficiary ID, Name, Type (Individual/Community), Support Details, Success Story.
  4. **Donor Badge**
    - Tracks gamification & recognition.
    - Key Fields: Badge ID, Badge Type (Bronze/Silver/Gold), Earned Date.
  5. **Impact Cart**
    - Mimics a shopping cart for multi-campaign donations.
    - Key Fields: Cart ID, Selected Campaigns, Total Donation Value, Forecasted Impact.
- 

## Fields Breakdown (Detailed)

### Donor

- Donor ID (Auto-Number)
- First Name (Text)
- Last Name (Text)
- Email (Email)
- Phone (Phone)
- Address (Text Area)
- Loyalty Points (Number)
- Total Contributions (Currency, Roll-up from Donations)
- Preferred Cause (Picklist: Education, Health, Disaster Relief, Other)
- Badge Status (Formula/Lookup from Donor Badge)

## **Donation**

- Donation ID (Auto-Number)
- Donation Amount (Currency)
- Date (Date/Time)
- Mode of Payment (Picklist: UPI, Card, Bank Transfer, Cash, Others)
- Status (Picklist: Pending, Completed, Failed, Refunded)
- Donor (Lookup to Donor)
- Campaign (Master-Detail to Campaign)
- Beneficiary (Lookup to Beneficiary)

## **Beneficiary**

- Beneficiary ID (Auto-Number)
- Name (Text)
- Type (Picklist: Individual, Community)
- Age (Number, optional if Individual)
- Location (Text)
- Support Details (Long Text Area)
- Success Story (Rich Text Area)

## **Campaign (Extended)**

- Campaign Goal (Currency)
- Amount Raised (Currency, Roll-up from Donations)
- Start Date (Date)
- End Date (Date)
- Status (Picklist: Active, Completed, Cancelled)

## **Donor Badge**

- Badge ID (Auto-Number)

- Badge Type (Picklist: Bronze, Silver, Gold, Platinum)
- Earned Date (Date)
- Donor (Master-Detail to Donor)

## Impact Cart

- Cart ID (Auto-Number)
  - Donor (Lookup to Donor)
  - Selected Campaigns (Multi-Select Picklist or Junction Relationship)
  - Total Donation Value (Currency, Calculated)
  - Forecasted Impact (Formula/Rich Text Area)
- 

## Record Types

- **Donation** → One-Time vs Recurring
  - **Campaign** → Education, Healthcare, Disaster Relief, CSR
  - **Beneficiary** → Individual vs Community
- 

## Page Layouts

- **Donor Layout** → Personal info, donation history (related list), loyalty points, earned badges.
  - **Donation Layout** → Donor, Campaign, Beneficiary, Amount, Status.
  - **Campaign Layout** → Goal, Raised, Progress bar, Associated Donations.
  - **Beneficiary Layout** → Details, Linked Donations, Linked Campaigns, Success Stories.
  - **Donor Badge Layout** → Badge Type, Earned Date, Linked Donor.
  - **Impact Cart Layout** → Selected Campaigns, Total Value, Forecasted Impact.
- 

## Compact Layouts

- **Donor** → Name, Loyalty Points, Total Contributions, Badge Status.
  - **Donation** → Amount, Status, Date.
  - **Campaign** → Name, Goal, Raised, End Date.
  - **Beneficiary** → Name, Type, Location, Support Status.
-

## Relationships (Detailed)

- **Donor** → **Donation** → Lookup (One donor can have many donations).
  - **Campaign** → **Donation** → Master-Detail (Each donation must belong to a campaign).
  - **Beneficiary** → **Donation** → Lookup (Donation linked to one beneficiary).
  - **Donor** → **Donor Badge** → Master-Detail (Badges tied to donor lifecycle).
  - **Donor** → **Impact Cart** → Lookup (Cart is linked to donor, can have multiple campaigns).
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## Junction Objects

- **Donation** → Junction between Donor and Campaign.
  - **Impact Cart** → Junction between Donor and multiple Campaigns.
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## Schema Builder

- Used to visually design & verify relationships.
  - Highlights:
    - Central object → **Donation**.
    - Donor ↔ Donation ↔ Campaign → core fundraising flow.
    - Beneficiary connected via lookup to Donation.
    - Gamification objects (Donor Badge, Impact Cart) extend donor engagement model.
- 

## External Objects (Future Scope)

- **Payment Gateway Integration** → Stripe/PayPal/UPI external objects to pull transaction details.
  - **Corporate CSR Systems** → Sync corporate donations to Salesforce campaigns.
  - **Impact Story Repository** → External content (images, videos, testimonials) stored outside Salesforce but linked via External Objects.
-

# Screenshots:

## Donor Object

SETUP > OBJECT MANAGER

Donor

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Details

Description

API Name  
Donor\_\_c

Custom  
✓

Singular Label  
Donor

Plural Label  
Donors

Enable Reports

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

EditDelete

SETUP > OBJECT MANAGER

Donor

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Fields & Relationships

12 Items. Sorted by Field Label

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Donor Address	Donor_Address__c	Text(80)		
Donor Email	Donor_Email__c	Email		
Donor ID	Donor_ID__c	Auto Number		
Donor Name	Name	Text(80)		✓
Donor Phone number	Donor_Phone_number__c	Phone		
First Name	First_Name_del__c	Text(80)		
Last Modified By	LastModifiedById	Lookup(User)		
Last Name	Last_Name__c	Text(80)		
Loyalty Points	Loyalty_Points__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Preferred Cause	Preferred_Cause__c	Picklist		

## Campaign Object

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Campaign

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Details

Description

API Name  
Campaign\_\_c

Custom  
✓

Singular Label  
Campaign

Plural Label  
Campaigns

Enable Reports  
✓

Track Activities  
✓

Track Field History  
✓

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

EditDelete

SETUP > OBJECT MANAGER

Campaign

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Hierarchy Columns

Object Access

Triggers

Flow Triggers

Fields & Relationships

41 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Active	IsActive	Checkbox		✓
Actual Cost in Campaign	ActualCost	Currency(18, 0)		
Actual Cost in Hierarchy	HierarchyActualCost	Currency(18, 0)		
Amount Raised	Amount_Raised__c	Roll-Up Summary (SUM Donation)		
Budgeted Cost in Campaign	BudgetedCost	Currency(18, 0)		
Budgeted Cost in Hierarchy	HierarchyBudgetedCost	Currency(18, 0)		
Campaign Approval Status	Campaign_Approval_Status__c	Picklist		
Campaign Goal	Campaign_Goal__c	Currency(18, 0)		
Campaign Member Type	CampaignMemberRecordTypeId	Lookup(Record Type)		
Campaign Name	Name	Text(80)		✓
Campaign Owner	OwnerId	Lookup(User)		✓
Campaign Record Type	RecordTypeId	Record Type		✓
Contacts in Campaign	NumberOfContacts	Number(9, 0)		
Contacts in Hierarchy	HierarchyNumberOfContacts	Number(9, 0)		

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Campaign Goal	Campaign_Goal__c	Currency(18, 0)		
Campaign Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date/Time		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
Start Date	Start_Date__c	Date/Time		
Status	Status__c	Picklist		

# Beneficiary Object

SETUP > OBJECT MANAGER

Beneficiary

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Details

Description

API Name

Beneficiary\_\_c

Custom

✓

Singular Label

Beneficiary

Plural Label

Beneficiaries

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete



SETUP > OBJECT MANAGER

Beneficiary

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Fields & Relationships

11 Items, Sorted by Field Label

Age

Age\_\_c

Number(2, 0)

Beneficiary ID

Beneficiary\_ID\_\_c

Auto Number

Beneficiary Name

Beneficiary\_Name\_\_c

Text(80)

Beneficiary Name

Name

Text(80)

✓

Created By

CreatedById

Lookup(User)

Last Modified By

LastModifiedById

Lookup(User)

Location

Location\_\_c

Text(40)

Owner

OwnerId

Lookup(User,Group)

✓

Record Type

RecordTypeId

Record Type

✓

Story/Impact Notes

Story\_Impact\_Notes\_\_c

Long Text Area(32768)

Type

Type\_\_c

Picklist

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

# Donation Object

SETUP > OBJECT MANAGER

Donation

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Details

Description

it stores the record of how much donation is received by which donor

API Name

Donation\_\_c

Custom

✓

Singular Label

Donation

Plural Label

Donations

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

SETUP > OBJECT MANAGER

Donation

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Fields & Relationships

13 Items, Sorted by Field Label

Beneficiary

Beneficiary\_\_c

Lookup(Beneficiary)

✓

Campaign

Campaign\_\_c

Master-Detail(Campaign)

✓

Created By

CreatedById

Lookup(User)

Donation Amount

Donation\_Amount\_\_c

Currency(7, 2)

Donation Date

Donation\_Date\_\_c

Date/Time

Donation ID

Donation\_ID\_\_c

Auto Number

Donation Name

Name

Text(80)

✓

Donation Status

Donation\_Status\_\_c

Picklist

Donor

Donor\_\_c

Lookup(Donor)

✓

Last Modified By

LastModifiedById

Lookup(User)

Mode of Payment

Mode\_of\_Payment\_\_c

Picklist

Record Type

RecordTypeId

Record Type

✓

Status of transaction

Status of transaction\_\_c

Picklist

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

# Impact Cart Object

SETUP > OBJECT MANAGER

Impact Cart

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Description

Details

API Name

Impact\_Cart\_\_c

Custom

✓

Singular Label

Impact Cart

Plural Label

Impact Cart

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

SETUP > OBJECT MANAGER

Impact Cart

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find

New

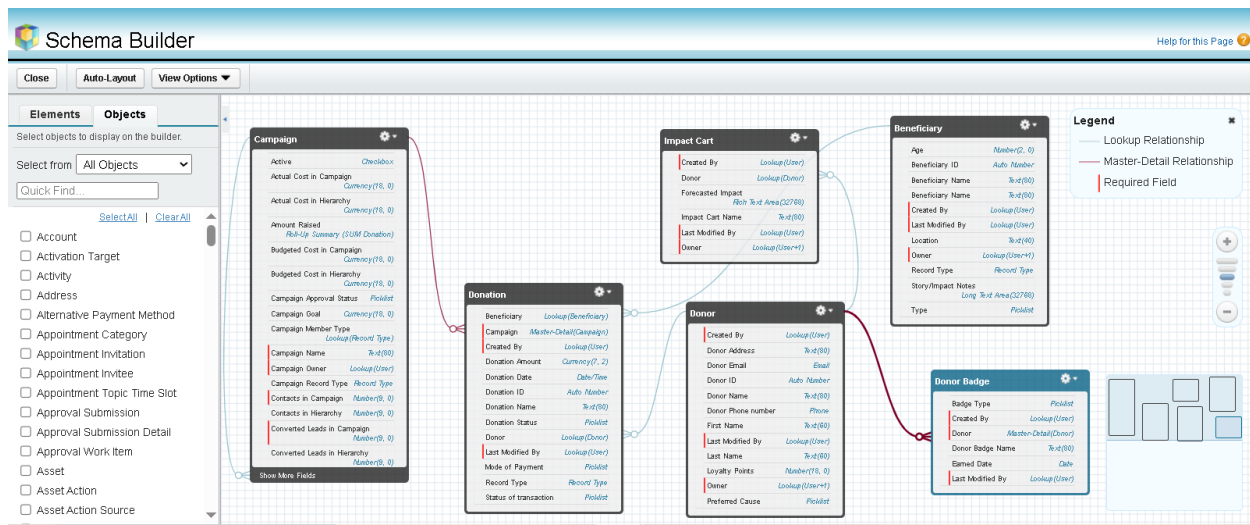
Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Donor	Donor__c	Lookup(Donor)		✓
Forecasted Impact	Forecasted_Impact__c	Rich Text Area(32768)		
Impact Cart Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

# Schema Builder



# Phase 4: Process Automation (Admin)

## Validation Rules

Ensure data accuracy and prevent bad entries.

- **Donation Amount > 0** → Block negative or zero donations.
  - **Email Required for Donor** → Donor record must have a valid email.
  - **Campaign End Date > Start Date** → Prevent invalid campaign setup.
  - **Beneficiary Age > 0** (if Type = Individual).
- 

## Workflow Rules

Automated simple field updates & alerts.

- **Donation Status = Completed** → Send **email alert** to donor with thank-you note.
  - **Campaign Goal Reached** → Update Campaign Status to “Completed”.
  - **Badge Earned** → Notify NGO staff when a donor reaches a new badge level.
- 

## Process Builder

Complex, conditional automation (but keep light since Flow is future-proof).

- **Recurring Donations** → Auto-generate next month’s donation record if donor opted for recurring.
  - **Donor Loyalty Points** → Add points automatically based on donation amount (e.g., ₹1000 = 10 points).
  - **High Value Donation (₹50,000+)** → Notify NGO Manager + create follow-up task for personal acknowledgment.
-

# Approval Process

Formal approvals are used where human decision is required.

- **Refund Requests** → Donor requests refund → goes to NGO Manager for approval.
  - **Large Campaign Proposals (> ₹5,00,000 goal)** → Requires Admin approval before going live.
- 

## Flow Builder

Most powerful automation tool (replacing Workflow/Process Builder gradually).

Types of flows used:

1. **Record-Triggered Flow**
    - When **Donation is created with Status = Completed** →
      - Update Donor's Total Contributions.
      - Update Campaign's Amount Raised.
      - Check if Donor qualifies for a new Badge → Assign automatically.
  2. **Screen Flow**
    - **Donor Portal Flow** → Donors can select campaigns, beneficiaries, and add to their **Impact Cart** before confirming donation.
    - **NGO Staff Flow** → Simplified UI for quickly adding new Beneficiaries.
  3. **Scheduled Flow**
    - Weekly → Send donors a **consolidated donation summary**.
    - Monthly → Send NGO staff a report of campaigns nearing deadlines.
  4. **Auto-Launched Flow**
    - Triggered by other processes (e.g., badge assignment).
- 

## Email Alerts

- **Donation Receipt** → Sent when Donation = Completed.
  - **Campaign Update** → Sent to all campaign donors when milestone reached (e.g., 50% funded).
  - **Badge Earned** → Congratulatory email with digital badge.
- 

## Field Updates

- Update **Donor Loyalty Points** on donation save.
- Update **Campaign Status** automatically when goals are reached.
- Set **Refund Status** to “Pending Manager Approval” when donor initiates request.

## Tasks

- Assign follow-up task to NGO Staff when a new Beneficiary is added (verify details).
- Assign donor relationship manager task when a **major donor (>₹50k)** contributes.

## Custom Notifications

- **Push Notification to NGO Staff** when a new large donation is made.
- **Push Notification to Donor** (via Experience Cloud app) when their donation is successfully received.
- **Internal Alert** for Admin when suspicious donation patterns (multiple failed attempts) occur.

## Screenshots:

### Validation rules

SETUP > OBJECT MANAGER

Donation

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Validation Rules

1 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Donation_Amount_Positive	Donation Amount	"Donation amount must be greater than 0"	✓	Arushi Verma, 9/24/2025, 9:34 AM

New

SETUP > OBJECT MANAGER

Beneficiary

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Validation Rules

1 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Age_validation_for_individuals	Top of Page	"Age must be greater than 0"	✓	Arushi Verma, 9/24/2025, 7:38 AM

New

SETUP > OBJECT MANAGER														
Donor														
Details	<b>Validation Rules</b> 1 Items, Sorted by Rule Name <span>New</span>													
Fields & Relationships														
Page Layouts														
Lightning Record Pages														
Buttons, Links, and Actions														
	<table> <tr> <th>RULE NAME</th><th>ERROR LOCATION</th><th>ERROR MESSAGE</th><th>ACTIVE</th><th>MODIFIED BY</th></tr> <tr> <td>Email_required</td><td>Top of Page</td><td>"Email is required"</td><td>✓</td><td>Arushi Verma, 9/24/2025, 5:52 AM</td></tr> </table>	RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	Email_required	Top of Page	"Email is required"	✓	Arushi Verma, 9/24/2025, 5:52 AM			
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY										
Email_required	Top of Page	"Email is required"	✓	Arushi Verma, 9/24/2025, 5:52 AM										

Work Flows

<div> <div>Quick Find / Search...</div> <div>Expand All   Collapse All</div> </div> <div> <div>Salesforce Mobile Quick Start</div> <div>Home</div> <div> <div>Administer</div> <div> <div>Release Updates</div> <div>Manage Users</div> <div>Manage Apps</div> <div>Manage Territories</div> <div>Company Profile</div> <div>Data Classification</div> <div>Privacy Center</div> <div>Security Controls</div> <div>Domain Management</div> <div>Communication Templates</div> <div>Translation Workbench</div> <div>Data Management</div> <div>Mobile Administration</div> <div>Desktop Administration</div> </div> </div> </div>																								
<div> <div>All Workflow Rules</div> <div> <div> <div>Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. <a href="#">Tell Me More</a>   <a href="#">Migrate your workflow rules to flows</a></div> <div>Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:</div> <ul style="list-style-type: none"> <li>Criteria that cause the workflow rule to run.</li> <li>Immediate actions that execute when a record matches the criteria. For example, Salesforce can automatically send an email that notifies the account team when a new high-value opportunity is created.</li> <li>Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers. For example, Salesforce can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.</li> </ul> </div> <div> <div>Quick Tips</div> <ul style="list-style-type: none"> <li>Useful Sample Workflow Rule</li> <li>Video Tutorial (English Only)</li> <li>Troubleshooting Workflow</li> </ul> </div> </div> <div> <div>View: All Workflow Rules</div> <div>Create New View</div> </div> <div> <div>A   B   C   D   E   F   G   H   I   J   K   L   M   N   O   P   Q   R   S   T   U   V   W   X   Y   Z   Other   All</div> <table> <tr> <th>Action</th><th>Rule Name</th><th>Description</th><th>Object</th><th>Active</th></tr> <tr> <td><a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a></td><td>badge update</td><td></td><td>Donor Badge</td><td>✓</td></tr> <tr> <td><a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a></td><td>Campaign Goal Met</td><td>when the campaign's amount raising goal is completed, then status change.</td><td>Campaign</td><td>✓</td></tr> <tr> <td><a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a></td><td>Completed Donation Confirmation</td><td>it sends an email alert when donation is completed.</td><td>Donation</td><td>✓</td></tr> </table> <div>A   B   C   D   E   F   G   H   I   J   K   L   M   N   O   P   Q   R   S   T   U   V   W   X   Y   Z   Other   All</div> </div> </div>					Action	Rule Name	Description	Object	Active	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	badge update		Donor Badge	✓	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Campaign Goal Met	when the campaign's amount raising goal is completed, then status change.	Campaign	✓	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Completed Donation Confirmation	it sends an email alert when donation is completed.	Donation	✓
Action	Rule Name	Description	Object	Active																				
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	badge update		Donor Badge	✓																				
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Campaign Goal Met	when the campaign's amount raising goal is completed, then status change.	Campaign	✓																				
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Completed Donation Confirmation	it sends an email alert when donation is completed.	Donation	✓																				

Quick Find / Search...

Expand All

Collapse All

Salesforce Mobile Quick Start

Home

Administer

Release Updates

Manage Users

Manage Apps

Manage Territories

Company Profile

Data Classification

Privacy Center

Security Controls

Domain Management

Communication Templates

Translation Workbench

Data Management

Workflow Rule

Campaign Goal Met

« Back to List: Workflow Rules

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder.

Tell Me More

Migrate your workflow rules to flows

Workflow Rule Detail

Edit

Clone

Deactivate

Rule Name	Campaign Goal Met	Object	Campaign
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	when the campaign's amount raising goal is completed, then status change.		
Rule Criteria	Amount_Raised__c >= Campaign_Goal__c		
Created By	Arushi Verma, 9/24/2025, 7:29 AM	Modified By	Arushi Verma, 9/25/2025, 3:15 AM

Workflow Actions

Edit

Immediate Workflow Actions

Approval Process

Quick Find / Search...

Expand All | Collapse All

Salesforce Mobile Quick Start

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Mobile Administration

Desktop Administration

Outlook Integration and Sync

Approval Processes

Campaign: Campaign Proposal Approval (Goal > ₹500,

« Back to Approval Process List

Process Definition Detail

Edit

Clone

Delete

Process Name

Campaign Proposal Approval (Goal > ₹500,

Active

☐

Unique Name

Campaign\_Proposal\_Approval\_Goal\_500

Next Automated Approver Determined By

Description

Campaign Proposal Approval (Goal > ₹500,000)

Entry Criteria

Campaign: Campaign Goal GREATER THAN 50000

Record Editability

Administrator ONLY

Allow Submitters to Recall Approval Requests

☐

Approval Assignment Email Template

Campaign\_Approved

Initial Submitters

Campaign Owner

Created By

Arushi Verma, 9/24/2025, 12:40 PM

Modified By

Arushi Verma, 9/24/2025, 12:40 PM

Initial Submission Actions

Add Existing

Add New

Action Type

Description

Record Lock

Lock the record from being edited

Approval Steps

New Approval Step

# Flow

Quick Find / Search...

Expand All | Collapse All

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Manage Territories

Company Profile

Data Classification

Privacy Center

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Translation Workbench

Data Management

Mobile Administration

Desktop Administration

Flows

Use clicks—not code—to build flows that provide guided visual experiences or behind-the-scenes automation. Flows can display and collect information from users, process sets of Salesforce records, and use powerful branching logic. You can also add flow actions that provide access to Apex code, JavaScript, and external web services. [Learn more about building flows.](#)

View:

All Flows

Edit | Create New View

New Flow

Action

Flow Label +

Description

Last Modified By

Last Modified Date

Is Active

Open | Edit | Security

Donation\_Process

Arushi Verma

9/24/2025, 10:45 AM

☒

Open | Edit | Security

High-Value Donation Notification

Arushi Verma

9/24/2025, 9:29 PM

☒

Open | Edit | Security

Loyalty points Thresholds

Arushi Verma

9/24/2025, 9:04 PM

☒

Paused and Failed Flow Interviews

View:

All Paused Flow Interviews

Clone | Create New View

Name +

Flow API Name

Flow Version

Type

Interview Label

Pause Reason

Paused or Failed Date

Current Element

Current Flow API Name

Current Flow Version

Flow Interview Guid

No records to display.

# Email Alerts

Quick Find / Search...

Expand All | Collapse All

Salesforce Mobile Quick Start

Home

Administer

Release Updates

Manage Users

Manage Apps

Manage Territories

Company Profile

Data Classification

Privacy Center

Security Controls

All Email Alerts

Email alerts are used to send emails from a flow or other automation.

View:

All Email Alerts

Create New View

New Email Alert

Action

Description +

Email Template Name

Object

Last Modified Date

Edit | Del

email confirmation when donation id completed

Thank you for Donation

Donation

9/25/2025

Edit | Del

new badge gained

Notify NGO Staff

Donor Badge

9/24/2025

Edit | Del

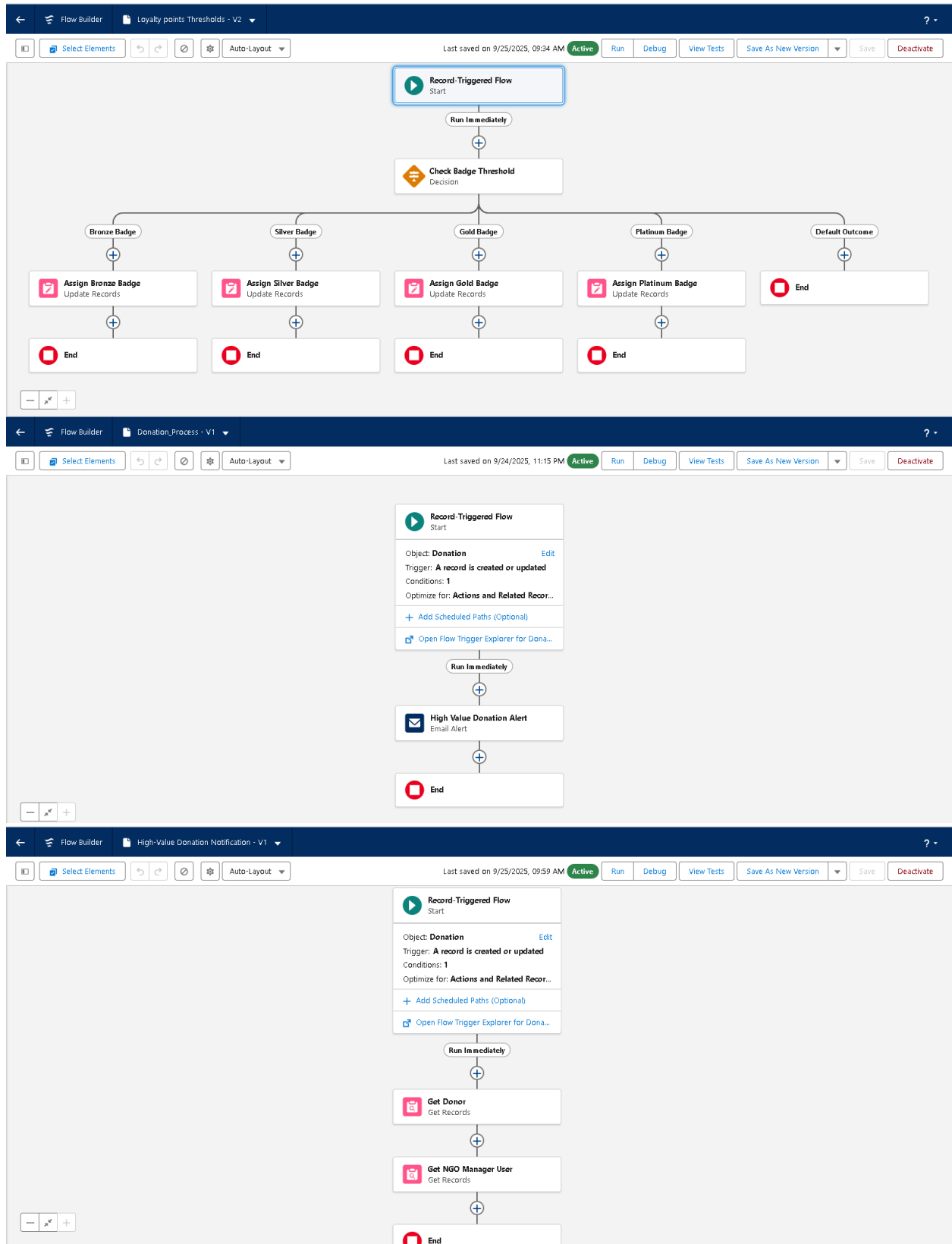
New donor added

Thank you for Donation

Donor

9/25/2025

# Flow builder





# Phase 5: Apex Programming (Developer)

## Classes & Objects

We created custom **Apex Classes** to encapsulate business logic.

**Example:**

- **DonationHandler.cls** → Handles logic for donation insert/update.
- **BadgeService.cls** → Calculates and assigns badges based on loyalty points.

**Benefit:** Separating logic into classes ensures **reusability and clean architecture**.

---

## Apex Triggers (Before/After Insert/Update/Delete)

**Key Triggers Implemented:**

1. **DonationTrigger**
  - *After Insert:* Update Donor's total contributions and loyalty points.
  - *After Update:* If donation status changes to *Completed*, recalculate totals.
2. **CampaignTrigger**
  - *After Insert/Update:* Check if Amount Raised  $\geq$  Goal → update status to *Completed*.

**Benefit:** Maintains **real-time accuracy** of donation totals and campaign progress.

---

## Trigger Design Pattern

To avoid bulky triggers, we followed the **Trigger Handler Pattern**:

- One trigger per object → delegates logic to a handler class.
- **Example:** `DonationTrigger` → calls `DonationHandler.onAfterInsert()`.

**Benefit:** Improves **readability, scalability, and testability**.

---

## SOQL & SOSL

- **SOQL (Salesforce Object Query Language):**  
Used in `DonationHandler` to fetch donor's existing contributions.
- `Donor d = [SELECT Id, Total_Contributions__c FROM Donor__c WHERE Id = :donorId];`
- **SOSL (Salesforce Object Search Language):**  
Used for donor search by email/phone.
- `List<List<sObject>> results = [FIND 'john@example.com' IN ALL FIELDS RETURNING Contact(Id, Name)];`

**Benefit:** Efficiently fetches records, supporting **donor and campaign management**.

---

## Collections (List, Set, Map)

- **List:** Store multiple donations for bulk updates.
- **Set:** Store unique donor IDs to avoid duplicate queries.
- **Map:** Map Donor ID → Total Contributions for quick lookups.

**Benefit:** Optimizes performance by handling bulk records gracefully.

---

## Control Statements

Applied **if-else, loops, and switch cases** in handler classes.

**Example:**

```
if(donation.Status__c == 'Completed') {  
    updateLoyaltyPoints(donation.Donor__c, donation.Amount__c);  
}
```

**Benefit:** Provides **flexible decision-making logic** for real scenarios.

---

## Batch Apex

Used for **large-scale data recalculations**.

**Example:**

- Batch job to **recalculate loyalty points** for all donors at the end of the fiscal year.

**Benefit:** Ensures **data consistency** even with thousands of records.

---

## Queueable Apex

Used for **background operations that need chaining**.

**Example:**

- When a donation is completed, queueable job sends donor details to an external CSR portal.

**Benefit:** Handles **asynchronous tasks** without blocking user actions.

---

## Scheduled Apex

**Use Case:** Monthly scheduled job to generate **Campaign Summary Reports** for staff.

**Benefit:** Automates recurring tasks without manual intervention.

---

## Future Methods

**Use Case:**

- On donation completion, send an **email acknowledgment** using a future method (non-blocking).

**Benefit:** Improves **performance and user experience**.

---

## Exception Handling

Wrapped logic in **try-catch blocks** to handle errors gracefully.

**Example:**

```
try {
    update donor;
} catch (DmlException e) {
    System.debug('Error updating donor: ' + e.getMessage());
}
```

**Benefit:** Prevents failures from breaking entire transactions.

---

## Test Classes

Created test classes for **all Apex code**:

- **DonationHandlerTest** → validates loyalty point updates.
- **CampaignHandlerTest** → validates campaign status updates.

**Best Practices Followed:**

- Test coverage > 75% (mandatory).
- Positive and negative test cases.
- Bulk data testing.

**Benefit:** Guarantees **quality and deployability** of code.

---

## Asynchronous Processing

We leveraged **Batch Apex, Queueable, Scheduled, and Future methods** to handle:

- Bulk updates (Batch Apex).
- External system integration (Queueable).
- Periodic reports (Scheduled).
- Quick email sending (Future).

**Benefit:** Keeps the system **scalable, fast, and user-friendly**.

---

## Screenshots:

```
1 trigger DonationTrigger on Donation__c (before insert, after insert, after update) {
2     DonationHandler handler = new DonationHandler();
3
4     if (Trigger.isBefore && Trigger.isInsert) {
5         handler.beforeInsert(Trigger.new);
6     }
7     if (Trigger.isAfter && Trigger.isInsert) {
8         handler.afterInsert(Trigger.new);
9     }
10    if (Trigger.isAfter && Trigger.isUpdate) {
11        handler.afterUpdate(Trigger.new, Trigger.oldMap);
12    }
13 }
14
15
```

## Phase 6: User Interface Development

### Lightning App Builder

**Purpose:** Create customized pages and apps for different user profiles without coding.

**Implementation:**

- **CharityConnect App:** A unified app containing all objects: Donors, Donations, Campaigns, Beneficiaries, Donor Badges, and Impact Cart.
- **Donor Home Page:** Highlights total contributions, loyalty points, and badges earned. Quick access to available campaigns.
- **NGO Staff Home Page:** Provides dashboards with campaign progress, donation totals, and tasks.

**Benefits:** Tailors the experience to user roles, allowing donors and staff to access relevant information quickly. It simplifies navigation and enhances user engagement.

---

## Record Pages

**Purpose:** Customize how individual object records are displayed for clarity and usability.

**Implementation:**

- **Donor Record Page:** Displays personal details, donation history, loyalty points, and badges earned.
- **Campaign Record Page:** Shows campaign goal, amount raised, and associated donations.
- **Donation Record Page:** Contains donor, campaign, beneficiary, and amount details.

**Benefits:** Users can view all relevant information at a glance, reducing manual effort and errors.

---

## Tabs

**Purpose:** Organize access to objects and functionality in the app.

**Implementation:**

- Tabs for **Donors, Donations, Campaigns, Beneficiaries, and Donor Badges.**
- Optional **Impact Cart tab** for donors to select multiple campaigns.

**Benefits:** Makes navigation intuitive and allows quick access to the most frequently used features.

---

## Home Page Layouts

**Purpose:** Provide role-based dashboards and quick action areas.

**Implementation:**

- **Donor Dashboard:** Highlights loyalty points, badges, and recent donations.
- **Staff Dashboard:** Displays campaign goals, donations received, and beneficiary tracking.

**Benefits:** Ensures that both donors and staff can see **key information immediately** without searching through records.

---

## Utility Bar

**Purpose:** Offer quick access tools visible across pages.

**Implementation:**

- Added tools for **Create Donation, Add Beneficiary, and View Campaign Performance**.

**Benefits:** Reduces clicks and improves productivity, allowing staff to perform frequent actions from any page.

---

## Lightning Web Components (LWC)

**Purpose:** Create dynamic, interactive components that improve engagement.

**Implementation:**

- **Smart Donor Cart LWC:** Donors can select campaigns and see the total donation instantly.
- **Donor Badge Display LWC:** Shows earned badges and loyalty points.

**Benefits:** Provides a **modern, interactive user experience** for donors and staff. Components update dynamically without page reloads.

---

## Apex with LWC

**Purpose:** Handle server-side logic and calculations for dynamic UI components.

**Implementation:**

- Apex Controllers fetch donor history for LWC display and calculate badge eligibility.

**Benefits:** Enables **real-time updates** and ensures complex calculations (like badges or loyalty points) are handled efficiently.

---

## Events in LWC

**Purpose:** Allow communication between LWC components for interactive updates.

**Implementation:**

- When a donor adds campaigns to the Impact Cart, the **Badge Display component updates automatically** to reflect potential points earned.

**Benefits:** Provides a seamless, interactive experience and ensures the UI reflects changes immediately.

---

## Wire Adapters & Imperative Apex Calls

**Purpose:** Retrieve Salesforce data either reactively (wire) or on-demand (imperative).

**Implementation:**

- **Wire Adapter:** Fetches donor's past donations and displays in dashboard.
- **Imperative Apex Call:** Calculates total donation value when multiple campaigns are selected in the Impact Cart.

**Benefits:** Optimizes performance and provides accurate, real-time data to the user.

---

## Navigation Service

**Purpose:** Programmatically control navigation between Salesforce pages.

**Implementation:**

- Donor completes Impact Cart → auto-navigate to **Confirmation Page**.
- Staff clicks "Top Donors" widget → navigate directly to Donor Record Page.

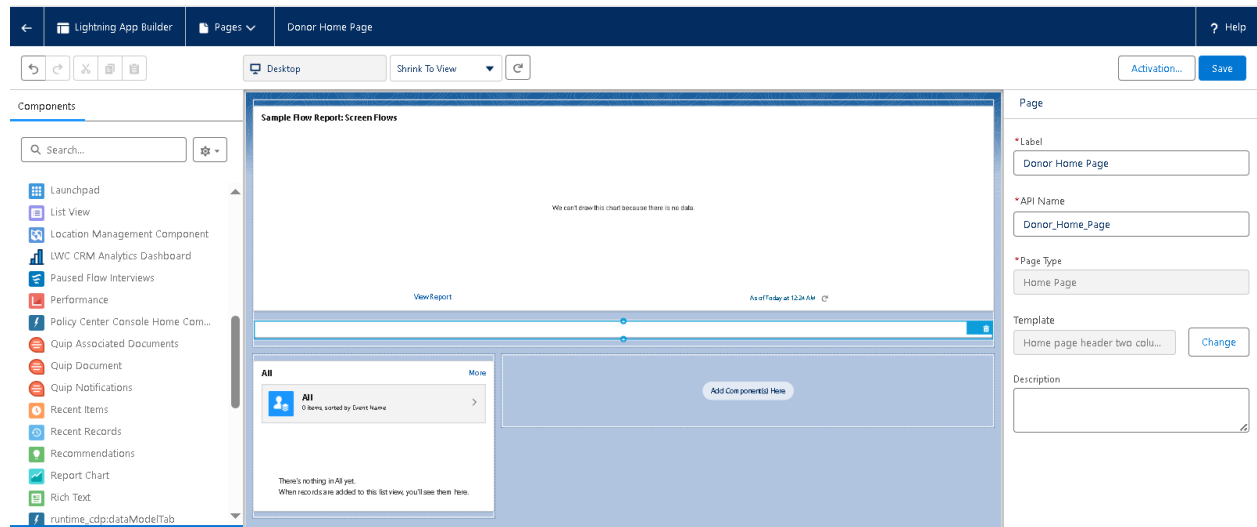
**Benefits:** Reduces unnecessary clicks, improves workflow efficiency, and enhances user experience.

---

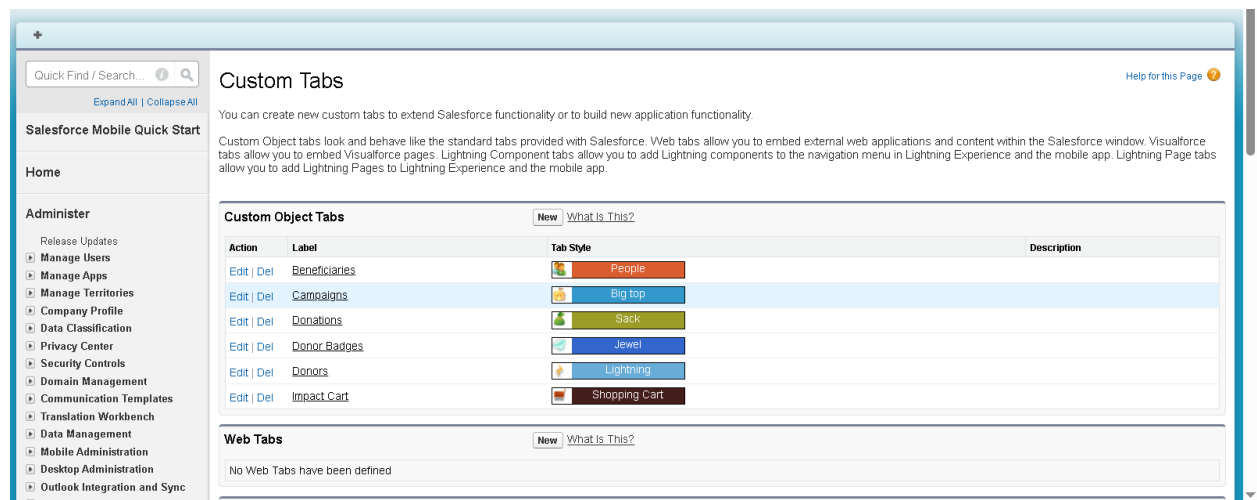
## Screenshots:



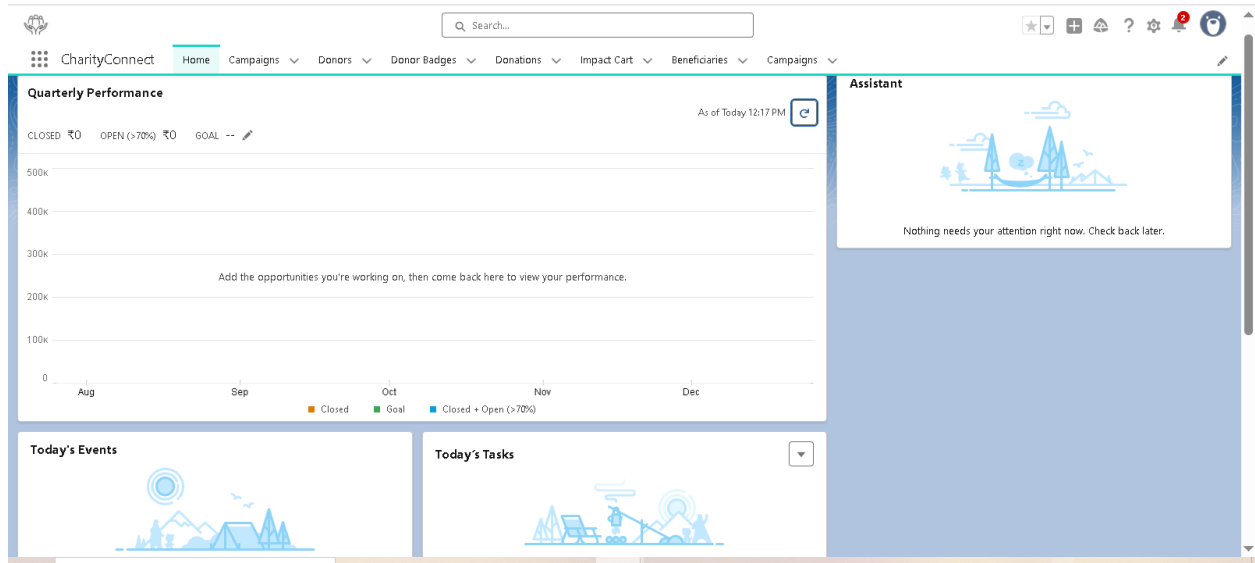
# Lightning app



# Tabs



# App layout

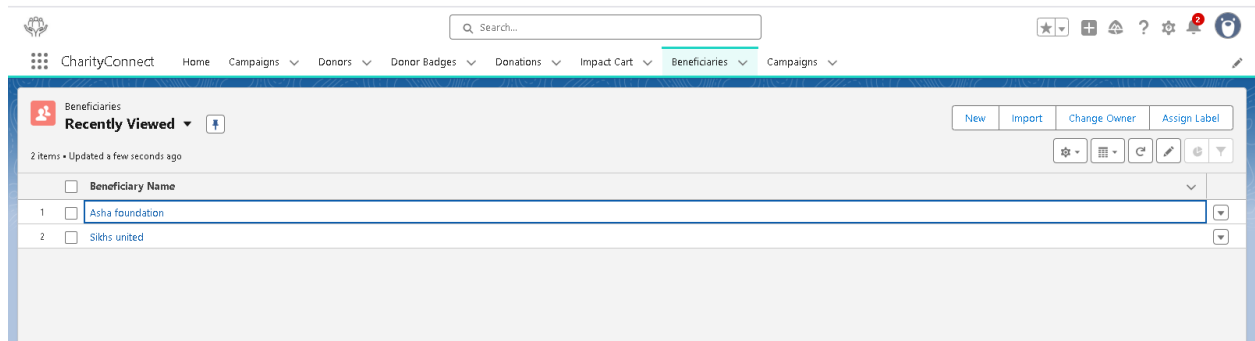


The 'Recently Viewed' table for Campaigns displays 2 items. The table has columns for 'Campaign Name' and a checkbox. The items are:

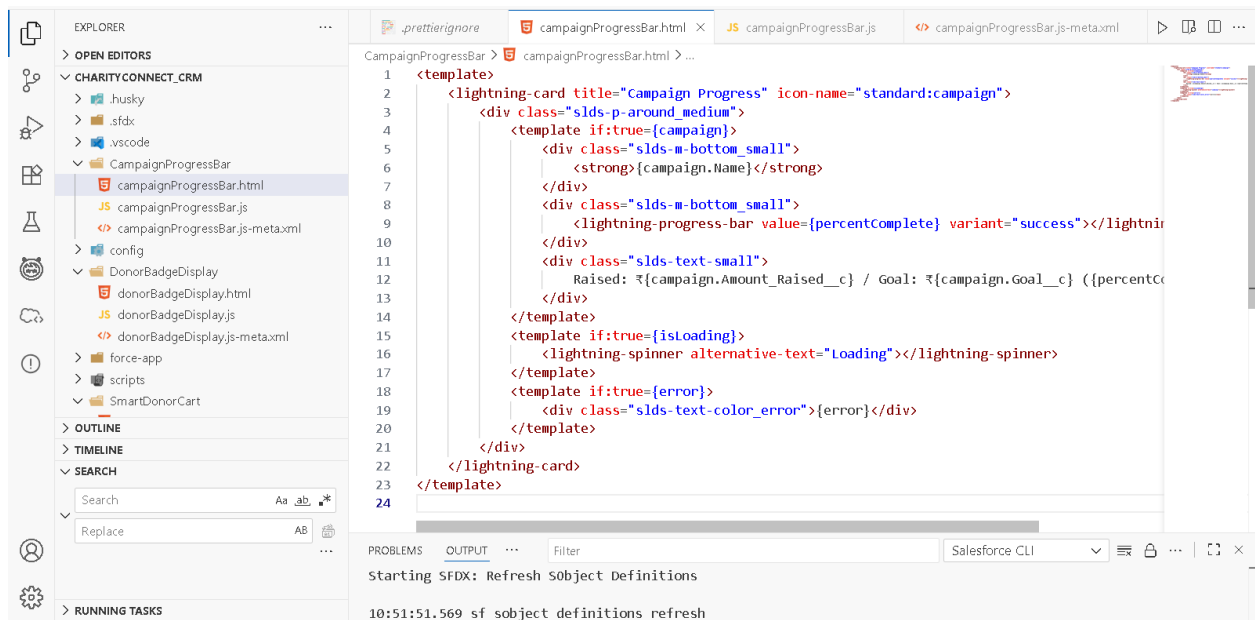
	<input type="checkbox"/> Campaign Name	
1	<input type="checkbox"/> Modi Punjab relief	
2	<input type="checkbox"/> Gandhi education	

The 'Recently Viewed' table for Donors displays 6 items. The table has columns for 'Donor Name' and a checkbox. The items are:

	<input type="checkbox"/> Donor Name	
1	<input type="checkbox"/> Azad	
2	<input type="checkbox"/> Donor	
3	<input type="checkbox"/> Donor	
4	<input type="checkbox"/> Arushi Verma	
5	<input type="checkbox"/> Pramod Kashita	
6	<input type="checkbox"/> Rakesh Jhaah	



## LWC component



## Rest uploaded in git

# Phase 7: Integration & External Access

## Named Credentials

- Store authentication details for external APIs (URL, token, key).
  - Removes need for hardcoding credentials in Apex.
  - **Example:** Store credentials for Razorpay/Stripe API → fetch donation payment status securely.
- 

## External Services

- Connect declaratively with APIs using OpenAPI/Swagger schema.
  - Generates invocable Apex actions usable in Flows.
  - **Example:** Connect to Payment Gateway API → donation verification action inside Flow.
- 

## Web Services (REST/SOAP)

- **REST API:** Lightweight, JSON-based, most common.
  - **SOAP API:** XML-based, less common for NGOs.
  - **Example:** Create REST endpoint in Salesforce → external NGO partner can fetch campaign donation summary.
  - **Example:** Donor portal calls Salesforce REST API to retrieve donor profile + loyalty points.
- 

## Callouts

- Outbound calls from Salesforce to external APIs.
  - Requires **Remote Site Settings** to whitelist endpoints.
  - **Example:** Call currency conversion API → convert foreign donations (USD/EUR) to INR before saving record.
- 

## Platform Events

- Event-driven communication inside Salesforce.
  - **Example:** Large donation received (> ₹1,00,000) → publish event → NGO Manager notified instantly.
- 

## Change Data Capture (CDC)

- Real-time tracking of changes to Salesforce records.
- **Example:** Whenever a Donation record is updated → event fired → CSR Partner Dashboard auto-refreshes.

---

## Salesforce Connect

- Access external system data without importing it.
- Creates External Objects linked to outside databases/APIs.
- **Example:** CSR corporate donation pledges stored in external DB → visible live in Salesforce campaigns.

---

## API Limits

- Salesforce restricts daily API calls (e.g., 15,000/day in Developer Org).
- Important for donation-heavy campaigns.
- **Example:** Use batch callouts to payment gateway instead of one call per donation → saves API calls.

---

## OAuth & Authentication

- Secure way for external apps to access Salesforce.
- Uses **OAuth 2.0 token exchange**.
- **Example:** Donor Portal authenticates via OAuth → ensures only registered donors see their dashboards.

---

## Remote Site Settings

- Required before making Apex callouts.
- Whitelists domains for security.
- **Example:** Add `https://api.razorpay.com` before calling payment API.

---

## Screenshots:

# Remote Site Details

The screenshot shows the 'Remote Site Details' page in Salesforce. The left sidebar contains navigation links: 'Salesforce Mobile Quick Start', 'Home', and 'Administer' (with sub-links like 'Release Updates', 'Manage Users', 'Manage Apps', etc.). The main content area is titled 'Remote Site Details' and includes a 'Back to List: Remote Site Settings' link. Below the title, there are 'Edit', 'Delete', and 'Clone' buttons. The form displays the following information: Remote Site Name: PaymentAPI; Remote Site URL: https://api.razorpay.com; Disable Protocol Security: ☐; Description: Active; Created By: Arushi Verma, 9/25/2025, 12:50 PM. At the bottom, there are 'Edit', 'Delete', and 'Clone' buttons.

# Named credential: crs

The screenshot shows the 'Named Credential: CSR\_Portal' page in Salesforce. The left sidebar contains navigation links: 'Salesforce Mobile Quick Start', 'Home', and 'Administer' (with sub-links like 'Release Updates', 'Manage Users', 'Manage Apps', etc.). The main content area is titled 'Named Credential: CSR\_Portal' and includes a 'Back to Named Credentials' link. Below the title, there are 'Edit' and 'Delete' buttons. The form displays the following information: Label: CSR\_Portal; Name: CSR\_Portal; URL: https://sonplaceholder.typicode.com. Under the 'Authentication' section, there is a 'Certificate' section with 'Identity Type' set to 'Anonymous' and 'Authentication Protocol' set to 'No Authentication'. Under the 'Callout Options' section, there are three options: 'Generate Authorization Header' (checked), 'Allow Merge Fields in HTTP Header' (unchecked), and 'Allow Merge Fields in HTTP Body' (unchecked).

## Phase 8: Data Management & Deployment

### Data Import Wizard

- A **user-friendly, declarative tool** in Salesforce to import small to medium data volumes (up to 50,000 records) via CSV files.
- **Alignment with CharityConnect:**
  - Initial import of donor base with details such as name, email, contact, preferred causes, and historical loyalty points.

- Import of pre-existing campaigns (Education Drive, Healthcare Relief, Disaster Relief) to set up the org quickly.
  - **Benefit:** No coding required; ideal for NGO staff/admins to quickly populate the system without developer intervention.
- 

## Data Loader

- A **client-based tool** for bulk operations (insert, update, delete, export) capable of handling **millions of records**.
  - **Use Case in CharityConnect:**
    - Import historical donation data spanning multiple years.
    - Update existing donation statuses in bulk after payment gateway reconciliation.
    - Export large datasets for audits or reporting.
  - **Alignment:** Ensures that large-scale donor and donation information is migrated efficiently and accurately.
- 

## Duplicate Rules

- Prevents **duplicate records** for Donors, Donations, and Beneficiaries.
  - **Mechanism:** Matching criteria like email, phone number, and donor ID ensures data integrity.
  - **Use Case:** If multiple NGO staff attempt to import donor data, duplicates are automatically flagged or blocked.
  - **Benefit:** Maintains a **clean, trustworthy donor database**, crucial for transparency.
- 

## Data Export & Backup

- Salesforce provides options for **manual and scheduled data exports** for compliance, auditing, and disaster recovery.
  - **Use Case in CharityConnect:**
    - Weekly or monthly export of Donation and Campaign records for **CSR audit and regulatory reporting**.
    - Backup of donor loyalty points and badges to prevent accidental data loss.
  - **Benefit:** Provides NGOs with **secure historical records** and peace of mind about data safety.
- 

## Change Sets

- Declarative method to deploy metadata between Salesforce orgs (Sandbox → Production).
  - **Use Case in CharityConnect:**
    - Deploy newly configured Flows for **Badge Assignment** and **Campaign Reporting** from UAT sandbox to live org.
    - Deploy updates to Custom Objects (Donor, Donation, Donor Badge) and Page Layouts without manual recreation.
  - **Benefit:** Ensures **consistent configuration and automation** across environments.
- 

## Unmanaged vs Managed Packages

- **Unmanaged Packages:** Internal deployments; metadata editable after installation.
  - **Managed Packages:** For distribution via AppExchange; metadata mostly locked.
  - **Use Case in CharityConnect:**
    - Unmanaged Package to deploy custom objects, Flows, and LWC components to another NGO org if needed.
  - **Benefit:** Facilitates **reuse and modular deployment** while maintaining flexibility.
- 

## ANT Migration Tool

- A **command-line tool** for deploying metadata in a scripted manner, ideal for **advanced deployments or CI/CD pipelines**.
  - **Use Case in CharityConnect:**
    - Automate migration of complex metadata like **Donation Flows, Badge Assignment logic, and Apex triggers** from Sandbox to Production.
  - **Benefit:** Reduces human errors and speeds up deployment of large-scale projects.
- 

## VS Code & Salesforce DX (SFDX)

- Provides a **developer-centric environment** for building, version controlling, and deploying Salesforce components.
  - **Use Case in CharityConnect:**
    - Developers create Apex triggers for Donation and Badge logic in **scratch orgs**, test locally, then deploy using SFDX.
    - Version control via GitHub ensures changes are tracked, collaborative, and reversible.
  - **Benefit:** Supports **agile development**, safe testing, and continuous deployment for NGO projects.
-



# Screenshots:

## Data wizard

Choose data

Almost done

Edit mapping

Start import

Edit Field Mapping: Donors

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	First Name	FirstName	Aarav	Diya	Rohan
Change	Last Name	LastName	Sharma	Verma	Gupta
Change	Donor Email	Email	aarav.sharma@e	diya.verma@exa	rohan.gupta@example.com
Change	Donor Phone number	ContactNumber	9876543210	9876543211	9876543212
Change	Preferred Cause	PreferredCause	Education	Healthcare	Disaster Relief
Change	Loyalty Points	LoyaltyPoints	120	80	50

## duplicate rule

Quick Find / Search...

Expand All | Collapse All

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Translation Workbench

Data Management

Matching Rule

Prevent Duplicate Donors matching rule

« Back to List: Duplicate Rules

Delete Clone Deactivate

Object

Donor

Rule Name

Prevent Duplicate Donors matching rule

Unique Name

Prevent\_Duplicate\_Donors\_matching\_rule

Description

Matching Criteria

(Donor : Donor\_email EXACT MatchBlank = FALSE) AND (Donor : Donor\_phone\_number EXACT MatchBlank = FALSE)

Status

Active

Created By

Arushi Verma, 9/25/2025, 2:07 PM

Modified By

Arushi Verma, 9/25/2025, 2:08 PM

Quick Find / Search...

Expand All | Collapse All

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All Duplicate Rules

What Are Duplicate Rules?

[ Expand ]

View: All Duplicate Rules

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New Rule

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Prevent Duplicate Donors	Prevent Duplicate Donors.	Donor	Prevent Duplicate Donors matching rule	✓	aru	9/25/2025
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Account	Standard Account Matching Rule	✓	QEPIG	9/16/2025
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Contact	Standard Lead Matching Rule Standard Contact Matching Rule	✓	QEPIG	9/16/2025
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Lead	Standard Lead Matching Rule Standard Contact Matching Rule	✓	QEPIG	9/16/2025

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

# Phase 9: Reporting, Dashboards & Security Review

## 1. Reports (Tabular, Summary, Matrix, Joined)

- Salesforce reports allow **analyzing and visualizing data** across objects.
  - **Types & Use Cases:**
    - **Tabular:** Simple list of donations → used for donor mailing lists or campaign audits.
    - **Summary:** Group donations by Campaign → shows total amount raised per campaign.
    - **Matrix:** Donations by Donor vs Campaign → visualizes contribution patterns.
    - **Joined:** Combines multiple objects → e.g., Donor + Donation + Beneficiary for transparency reports.
  - **Benefit:** Helps NGOs **track donation trends, monitor campaign performance, and ensure transparency to donors.**
- 

## 2. Report Types

- Define **relationships between objects** for reporting purposes.
  - **Use Case in CharityConnect:**
    - Custom Report Type: Donation → Campaign → Beneficiary → Donor.
    - Enables staff to generate **impact reports** showing exactly how donor contributions are allocated.
  - **Benefit:** Provides **flexible reporting options** for internal audits and donor updates.
- 

## 3. Dashboards

- Visual representation of key metrics using **charts, tables, and gauges.**
  - **Use Case:**
    - Campaign Progress Dashboard: Total amount raised vs goal, active campaigns, top donors.
    - Donor Engagement Dashboard: Loyalty points, badges earned, recurring donations.
  - **Benefit:** Allows NGO staff to **monitor real-time performance** and make informed decisions.
-

## 4. Dynamic Dashboards

- Dashboards display **data personalized to the logged-in user**.
  - **Use Case:**
    - Donor Portal: Donors see **only their own contributions and badges**.
    - NGO Manager: Sees **all campaigns, donations, and beneficiary details**.
  - **Benefit:** Ensures **data privacy** while providing tailored insights.
- 

## 5. Sharing Settings

- Control **who can see or edit records** in Salesforce.
  - **Use Case:**
    - Donations: Private by default → only donor & NGO Staff can view.
    - Campaigns: Public Read-Only for all NGO staff → allows transparency without risk of modification.
  - **Benefit:** Protects sensitive donor data while enabling collaboration among staff.
- 

## 6. Field Level Security (FLS)

- Controls visibility and edit access to specific fields for different profiles.
  - **Use Case:**
    - Donor email & payment information → visible to NGO Staff, hidden from Donor Users.
    - Loyalty Points & Badge Status → visible to both staff and donor portal.
  - **Benefit:** Ensures **data confidentiality and regulatory compliance**.
- 

## 7. Session Settings

- Configure **session timeouts, login history, and security policies**.
  - **Use Case:**
    - Donor portal session timeout set to 30 minutes of inactivity.
    - Staff portal session timeout: 1 hour with automatic logout.
  - **Benefit:** Enhances **data security**, reduces risk of unauthorized access.
- 

## 8. Login IP Ranges

Restricts access to Salesforce org to **specific IP addresses**.

- **Use Case:**
    - NGO staff can log in only from office or verified home IP addresses.
  - **Benefit:** Adds **network-level security** to prevent unauthorized logins.
- 

## 9. Audit Trail

- Tracks all **configuration changes and system modifications** in Salesforce.
  - **Use Case:**
    - Track updates to Campaigns, Donations, or Beneficiary records.
    - Identify who modified a donor record and when.
  - **Benefit:** Provides **accountability, transparency, and compliance** for NGO reporting.
- 

## Screenshots:

### Custom report types

Quick Find / Search...

[Expand All](#) | [Collapse All](#)

**Salesforce Mobile Quick Start**

**Home**

**Administer**

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management
- Communication Templates

### Custom Report Types

[Help for this Page](#)

#### What is a Custom Report Type?

Custom report types allow you to build a framework in the report wizard, from which users can create and customize reports. You build custom report types off of the relationships (master-detail and lookup) between objects so that you can:

- Choose which objects to display to users creating and customizing reports
- Define the relationships between objects displayed to users creating and customizing reports
- Select which objects' fields can be used as columns in reports

Note that the visibility of custom report types in the report wizard is controlled by users' access to the objects in the report type.

☐ Don't show me this page again

Quick Find / Search...

Expand All | Collapse All

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Data Management

Mobile Administration

Desktop Administration

Outlook Integration and Sync

Custom Report Type

Campaigns with Donations with Campaigns

« Back to List: Custom Report Types

Help for this Page

Below is the information for this custom report type. You can click the buttons on this page to preview or update information for the custom report type.

Custom Report Type Definition

EditDeleteClone

Report Type Label	Campaigns with Donations with Campaigns	Report Type Category	Campaigns
Report Type Name	Campaigns_with_Donations_with_Campaigns	Deployment Status	Deployed
Description	Campaigns with Donations with Campaigns		
Created By	Arushi Verma, 9/25/2025, 2:21 AM	Modified By	Arushi Verma, 9/25/2025, 2:21 AM

Object Relationships

Edit

Object Relationships Help

Campaigns (A)

with at least one related record from Donations (B)

A B

A B

# Sharing settings

Quick Find / Search...

Expand All | Collapse All

Salesforce Mobile Quick Start

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Health Check

Sharing Settings

Field Accessibility

Password Policies

Session Settings

Login Flows

Network Access

Activations

Session Management

Login Access Policies

Certificate and Key Management

Sharing Settings

Help for this Page

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects

Disable External Sharing Model

Default Sharing Settings

Organization-Wide Defaults

Edit

Organization-Wide Defaults Help

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Read/Write	Public Read/Write	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓

# Login history

**Login History**

Download the last six months of login history. Or, filter and show up to 20,000 records of login history for the last six months.

Location shows the approximate location of the IP address from where the user logged in. To show more geographic information, such as approximate city and postal code, create a custom view to include those fields. The accuracy of geolocation fields (for example, country, city, postal code) may vary.

**Download Options**

**File Type**  
☒ CSV File  
☐ GZIP File

**File Contents**  
All Logins

**Download Now**

**View:** All Create New View

Username	Login Time	Source IP	Location	Login Type	Status	Browser	Platform	Application	Client Version	API Type	API Version	Login URL
arushi.verma.cs22930@agentforce.com	9/25/2025, 2:53:48 AM PDT	52.205.41.207	United States	Remote Access 2.0	Success	Unknown	Unknown	Trailhead Connected App	N/A	N/A	N/A	login.salesforce.com
arushi.verma.cs22930@agentforce.com	9/25/2025, 1:37:59 AM PDT	52.205.41.207	United States	Remote Access 2.0	Success	Unknown	Unknown	Trailhead Connected App	N/A	N/A	N/A	login.salesforce.com
arushi.verma.cs22930@agentforce.com	9/24/2025, 10:34:05 PM PDT	18.236.5.25	United States	Remote Access 2.0	Success	Unknown	Unknown	Lightning Object Creator	N/A	N/A	N/A	login.salesforce.com
arushi.verma.cs22930@agentforce.com	9/24/2025, 8:40:52 PM PDT	171.49.140.228	India	Application	Success	Chrome 140	Windows 10	Browser	N/A	N/A	N/A	org/iframe-9ab3f8df67-de ed.develop.my.salesfor
arushi.verma.cs22930@agentforce.com	9/23/2025, 9:05:36 PM	106.205.94.16	India	Application	Success	Chrome 140	Windows 10	Browser	N/A	N/A	N/A	login.salesforce.com

## Phase 10: Final Presentation & Demo Day

### 1. Pitch Presentation

- **Slide Content:**
  - **Problem:** Low donor trust, scattered donation records, no reward system.
  - **Solution:** CharityConnect CRM
    - **Smart Donor Cart:** Select multiple campaigns; total auto-calculated.
    - **Loyalty Points & Badges:** Rewards gamify donations.
    - **Transparency Dashboards:** Donors see how contributions are utilized.
    - **Email Alerts:** Automated thank-you & large donation notifications.
  - **Implementation Phases:** Phase 1–9 summary, showing Admin + Developer tasks.
  - **Impact:** Improved donor engagement, efficiency in campaign management.
- **Visuals:**
  - Screenshot of donor portal showing cart and badges.
  - Dashboard showing campaign progress.
  - Flow diagram of donation → donor → campaign → beneficiary process.

### 2. Demo Walkthrough

- The demo video link is as follows:  
<https://youtu.be/x3Ka60TnkY4>

### 3. Feedback Collection

- **Methods:** Google Form + verbal interview.
  - **Questions:**
    - Did donor portal provide clear transparency on fund usage?
    - Was the Smart Cart experience intuitive?
    - Are loyalty points and badges motivating?
    - Are reports and dashboards easy to interpret?
  - **Outcome:** Feedback used to refine Flows, dashboard layout, and UI.
- 

### 4. Handoff Documentation

- All the documentation of all the phases is shared on the github link
- 

### 5. LinkedIn / Portfolio Project Showcase

[https://github.com/Aarushi2772/TCS\\_Salesforce\\_CharityConnect\\_CRM\\_project/tree/main](https://github.com/Aarushi2772/TCS_Salesforce_CharityConnect_CRM_project/tree/main)