

Salesforce NGO Management System

Phase 2 – Org Setup & Configuration

2.1 Company Profile Setup

Description: Configure NGO details like name, currency, locale, and time zone.

Steps:

1. Go to Setup → Company Settings → Company Information.
2. Update details:
 - Company Name: Helping Hands NGO
 - Default Currency: INR (■)
 - Locale: English (India)
 - Time Zone: Asia/Kolkata (IST)
3. Save changes.

2.2 Business Hours & Holidays

Description: Define working hours and holidays for service-level tracking.

Steps:

1. Navigate to Setup → Company Settings → Business Hours.
2. Create: Mon–Sat, 9:00 AM – 6:00 PM.
3. Go to Holidays → Add: Diwali, Dussehra, New Year.

2.3 Fiscal Year Settings

Description: Align fiscal year with NGO reporting cycles.

Steps:

1. Go to Setup → Fiscal Year.
2. Select Standard Fiscal Year.
3. Set to April – March.

2.4 User Setup & Licenses

Description: Create users and assign licenses for each role.

Steps:

1. Go to Setup → Users → Users.
2. Add:
 - Admin (System Administrator License)
 - 2 Fundraising Officers (Platform User License)
 - Finance Manager (Platform User License)
 - Program Manager (Platform User License)

2.5 Profiles

Description: Define baseline access levels for users.

Steps:

1. Go to Setup → Profiles.
2. Clone Standard Platform User.
3. Create:
 - Fundraising_Officer_Profile: Donors, Donations, Campaigns
 - Finance_Manager_Profile: Payments, Grants, Reports
 - Program_Manager_Profile: Volunteers, Events, Reports
4. Assign profiles to users.

2.6 Roles

Description: Define hierarchy for data visibility.

Steps:

1. Go to Setup → Roles → Set Up Roles.
2. Create hierarchy:

Admin

- ■ ■ Fundraising Manager
- ■ ■ ■ Fundraising Officer
- ■ ■ Finance Manager
- ■ ■ Program Manager

3. Assign users to roles.

2.7 Permission Sets

Description: Extend access beyond profiles.

Steps:

1. Go to Setup → Permission Sets → New.
2. Create:
 - Donor_Data_Access (for Fundraising Officers)
 - Reports_Access (for Managers)
3. Assign permission sets to users.

2.8 Organization-Wide Defaults (OWD)

Description: Set baseline record access across the org.

Steps:

1. Go to Setup → Sharing Settings.
2. Configure OWD:
 - Donors → Private
 - Donations → Controlled by Parent (Donor)
 - Payments → Private
 - Campaigns → Public Read Only

2.9 Sharing Rules

Description: Open up access where required.

Steps:

1. Go to Setup → Sharing Settings → New Sharing Rule.
2. Add rules:
 - Share Donors among fundraising officers in the same region
 - Share Donations with Finance Manager

2.10 Login Access Policies

Description: Enable secure access for admins and managers.

Steps:

Allow Managers/Admins 24/7 access.

2.11 Dev Org Setup

Description: Configure developer org for building and testing.

Steps:

- Use Developer Org created earlier.
- Install Salesforce CLI (SFDX) for metadata management.

2.12 Sandbox Usage

Description: Test changes before production (not in Dev Edition).

Steps:

- Developer Edition doesn't support sandboxes.
- In Enterprise Edition, use Full Sandbox for UAT.

2.13 Deployment Basics

Description: Move customizations between environments.

Steps:

1. Use Change Sets for simple deployments.
2. For advanced projects, use Salesforce CLI (SFDX).
3. Path: Dev Org → Sandbox (UAT) → Production

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orgfarm-9675b4ff9d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page/address=%2F005pK000008DX8%3Fnoredirect%3DT%26isUserEntityOverride%3DT1

Setup Home Object Manager

Users

Users

Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users

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SETUP Users

User Madhura Ughade

Permission Set Assignments (0) | Permission Set Assignments Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Apps (0) | Third Party Account Links (0) | Built-in Authenticators (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0) | User Profile Settings Accounts (0)

User Detail

Name: Madhura Ughade
Alias: mughade
Email: madhura@ngo.com [Verify]
Username: madhuraughade@ngo.com
Nickname: MADHURA
Title: Volunteer
Company: NGO Management
Department: Donation
Division:
Address:
Time Zone: (GMT-05:00) Central Daylight Time (America/Resolute)
Locale: English (India)
Language: English
Delegated Approver:
Manager:
Receive Approval Request Emails: Only if I am an approver
Federation ID:

Role: CEO
User License: Force.com - Free
Profile: Force.com - Free User
Active: ☒
Marketing User: ☐
Offline User: ☐
Knowledge User: ☐
Flow User: ☐
Service Cloud User: ☐
Site.com Contributor User: ☐
Site.com Publisher User: ☐
WDC User: ☐
Mobile Push Registrations: ☐
Data.com User Type: ☐
Accessibility Mode (Classic Only): ☐
Debug Mode: ☐
High Contrast Palette on Charts: ☐

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Setup Home Object Manager

business

Company Settings
Business Hours

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SETUP Business Hours

Organization Business Hours

Help for this Page

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	Business Hours Name	Active	Time Zone	Default
Edit	Default	<input checked="" type="checkbox"/>	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	<input type="checkbox"/>
Edit	NGO Operating Hours	<input checked="" type="checkbox"/>	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	<input checked="" type="checkbox"/>

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

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orgfarm-9675b4ff9d-dev-ed.develop.lightning.force.com/lightning/setup/Roles/page/address=%2Fu%2Fsetup%2Fuser%2FroleViewPage%3Fsetupid%3DRoles%26isDeleteRedirect%3Dtrue

Setup Home Object Manager

roles

Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases

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SETUP Roles

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

Collapsible All Expand All

Prof Ram Meghe Institute Technology & Research

- CEO Edit | Del | Assign
 - CEQ Edit | Del | Assign
 - COO Edit | Del | Assign
 - Director Edit | Del | Assign
 - NGO Manager Edit | Del | Assign
 - Fundraising Team Edit | Del | Assign
 - Volunteer Edit | Del | Assign
- SVP, Customer Service & Support Edit | Del | Assign
 - Customer Support, International Edit | Del | Assign

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Setup

company

Company Settings

Business Hours

Calendar Settings

Public Calendars and Resources

Company Information

Data Protection and Privacy

Fiscal Year

Holidays

Language Settings

My Domain

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SETUP

Company Information

Company Information

Prof Ram Meghe Institute Technology &Research

The organization's profile is below:

User Licenses (102) | Permission Set Licenses (102) | Feature Licenses (10) | Usage-based Endorsements (102)

Organization Detail

Organization Name

Prof Ram Meghe Institute Technology &Research

Phone

Primary Contact

Madhura Ughade

Fax

N/A

Division

Default Locale

English (India)

Address

Amravati
Amravati 444601
Maharashtra
India

Default Language

English

Fiscal Year Starts In

January

Default Time Zone

(GMT-05:00) Central Daylight Time (America/Resolute)

Activate Multiple Currencies

☐

Currency Locale

English (India) - INR

Enable Data Translation

☐

Used Data Space

378 KB (7%) [View](#)

Newsletter

☒

Used File Space

17 KB (0%) [View](#)

Admin Newsletter

☒

API Requests, Last 24 Hours

0 (15,000 max)

Hide Notices About System Maintenance

☐

Streaming API Events, Last 24 Hours

0 (10,000 max)

Hide Notices About System Downtime

☐

Restricted Logins, Current Month

0 (0 max)

Locale Formats

ICU

Salesforce.com Organization ID

000gK000007a3b0

Organization Edition

Developer Edition

Instance

CAN95

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Setup

profil

Users

Profiles

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SETUP

Profiles

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

A

B

C

D

E

F

G

H

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J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

☐ Action

Profile Name

User License

Custom

☐ Edit | Clone

Force.com - App Subscription User

Force.com - App Subscription

☐

☐ Edit | Clone

Force.com - Free User

Force.com - Free

☐

☐ Edit | Del | ...

Fundraising Staff

Salesforce

☒

☐ Edit | Del | ...

Fundraising Staff Profile

Salesforce

☒

1-4 of 4 0 Selected

Page 1 of 1