

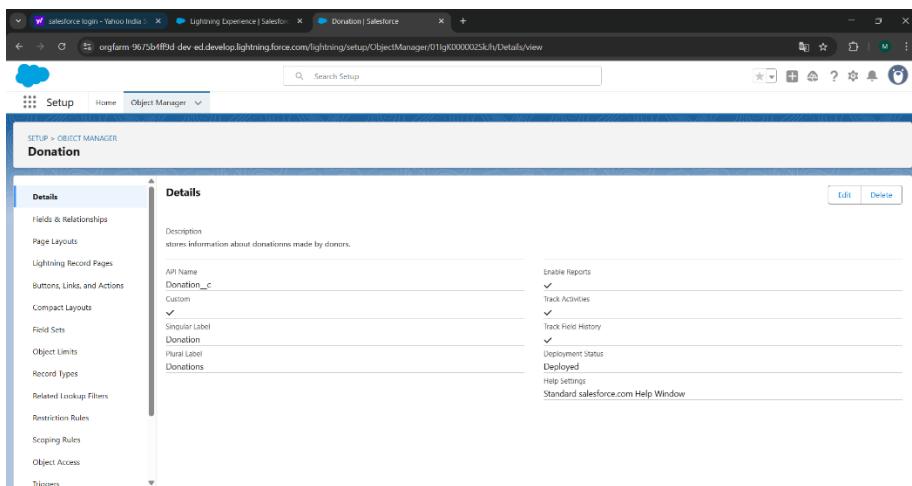
Phase 3 — Data Modeling & Relationships

Objective

To design the data structure of **The Salesforce Donation NGO Management System** by creating custom objects, fields, and relationships that capture the core processes: Donation, Donor Contribution History, Fundraising Event, Volunteer Participation objects.

Step 1: Create the Donation Object

1. Go to **Setup** → **Object Manager** → **Create** → **Custom Object**.
2. Enter details:
 - Label: Donation
 - Plural Label: Donations
 - Record Name: Donation Number
 - Check **Allow Reports** and **Allow Activities**.
 - Save.



3. Add fields:
 - Donor ID → Lookup,Contact
 - Donation Amount→ Currency

- o Donation Date → Date
- o Campaign Name → Lookup, Campaign
- o Payment Status → Picklist.Pending,Completed,Failed

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Destination	Destination__c	Text(100) (External ID) (Unique Case Insensitive)		
Donation date	Donation_date__c	Date		
Donation Number	Donation_Number__c	Auto Number		
Donation Number	Name	Auto Number		
Fund Allocation	Fund_Allocation__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)		
Payment status	Payment_Status__c	Picklist		

4. Configure Compact Layout to display: Full Name, Email, Phone.

Step 2: Create the Donor Contribution History Object

1. Setup → Object Manager → Create → Custom Object.
2. Enter details:
 - o Label: Donor Contribution History
 - o Plural: Donor Contribution Histories
 - o Record Name: Donor Contribution Name (Text).
 - o Save.

Details

Description
Tracks total contributions and last donation dates for each donor.

API Name: Donor_Contribution_History_c
Custom: ✓
Singular Label: Donor Contribution History
Plural Label: Donor Contribution Histories

Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

3. Add fields:

- o Donor ID → Text(100)
- o Total Contribution → Currency
- o Last Donation Date → Date

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		✓
Donor Contribution History Name	Name	Text(80)		✓
Donor ID	Donor_ID__c	Lookup(Contact)		✓
Last Donation Date	Last_Donation_Date__c	Date		✓
Last Modified By	LastModifiedById	Lookup(User)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Total Contribution	Total_Contribution__c	Currency(16, 2)		

Step 3: Create the Fundraising Event Object

1. Create object:

- o Label: Fundraising Event
- o Plural: Fundraising Events
- o Record Name: Event Number (Auto Number format BK-{0000}).

Details	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Description	Stores details of fundraising events,including date,organizer,and target amount.
API Name	Fundraising_Event_Object__c
Custom	✓
Singular Label	Fundraising Event
Plural Label	Fundraising Events
Enable Reports	
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

2. Add fields:

- Event Name → Text(80)
- Event Date → Date (Required)
- Organizer → Lookup(User)
- Rarget Amount → Currency

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Event Date	Event_Date__c	Date		
Event Name	Event_Name__c	Text(100)		
Fundraising Event Object Name	Name	Text(80)		
Last Modified By	LastModifiedById	Lookup(User)		
Organizer	Organizer__c	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Target Amount	Target_Amount__c	Currency(16, 2)		

Step 4: Create the Volunteer Participation Object

1. Create object:

- Label: Volunteer Participation
- Plural: Volunteer Participations

2. Add fields:

- Volunteer Name → Lookup(Contact)
- Event → Lookup
- Hours Contributed → Number

3. Create Roll-Up Summary on Donars:

- Field Name: Total Paid
- Type: SUM of Donors.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Volunteer Participation'. On the left, there's a sidebar with various setup categories like 'Page Layouts', 'Lightning Record Pages', etc. The main content area is titled 'Fields & Relationships' and displays a table of fields. The table has columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The fields listed are: Created By (CreatedBy), Event (Event__c), Hours Contributed (Hours_Contributed__c), Last Modified By (LastModifiedBy), Owner (OwnerId), Volunteer Name (Volunteer_Name__c), and Volunteer Participation Name (Name). The 'DATA TYPE' column shows types like 'Lookup(User)', 'Lookup(Fundraising Event)', 'Number(5, 2)', 'Lookup(User)', 'Lookup(Contact)', and 'Text(80)'. The 'CONTROLLING FIELD' column contains dropdown arrows, and the 'INDEXED' column has checkboxes.

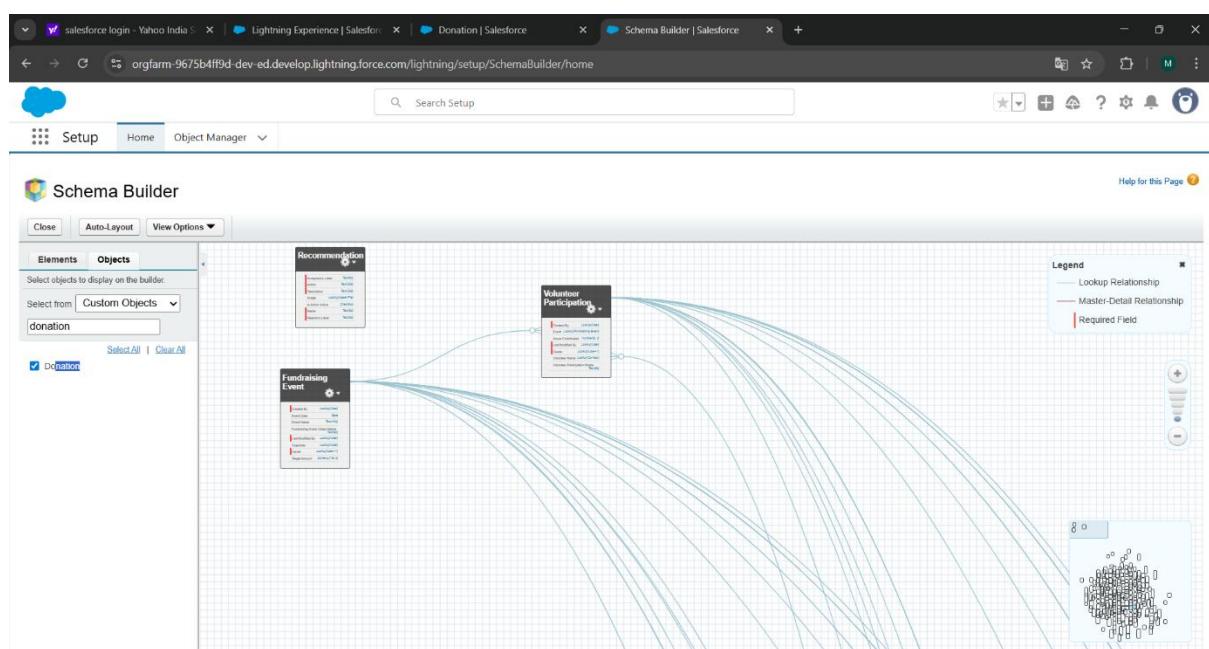
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Event	Event__c	Lookup(Fundraising Event)	▼	▼
Hours Contributed	Hours_Contributed__c	Number(5, 2)		▼
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)	▼	
Volunteer Name	Volunteer_Name__c	Lookup(Contact)	▼	▼
Volunteer Participation Name	Name	Text(80)	▼	▼

Step 6: Define Relationships

- **Donation → Donor:** One-to-Many (one donor can create many Donations).
 - **Donor contribution history → contacts:** One-to-Many (Links the contribution summary back to the specific donor).
 - **Fundraising Event ↔ Volunteer Participation:** Many-to-Many (using a junction object *volunteer participation* if needed).
 - **Volunteer Participation → Customers:** Link the volunteer participation record back to the specific contact who volunteered.
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Step 7: Verify with Schema Builder

1. Go to **Setup → Schema Builder**.
2. Drag all created objects (Donation, Donor contribution History, Fundraising event, volunteer participation).
3. Visually confirm the relationships:
 - o Donar → Donation (Lookup).
 - o Fundraising Event → Volunteer Participation (Master-Detail).
4. Save schema diagram.



✓ Outcome of Phase 3:

The data model for the Salesforce Donation NGO Management system is successfully created and verified with properly linked objects, fields, and relationships to manage donors, donations, campaigns, events, and volunteer data.