

Salesforce NGO Management System

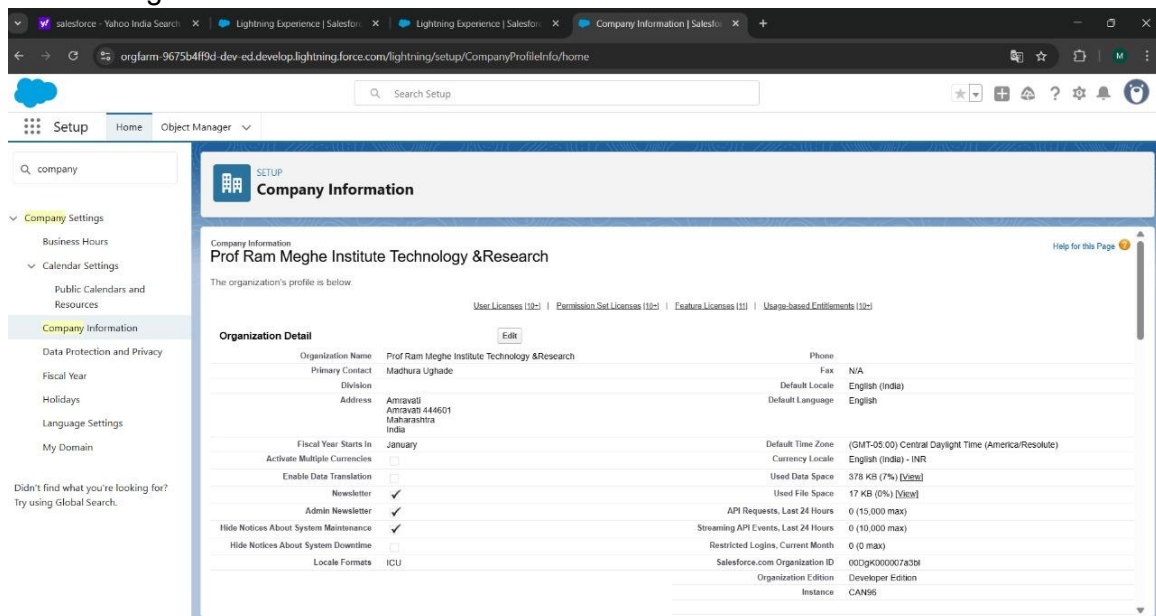
Phase 2 – Org Setup & Configuration

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.

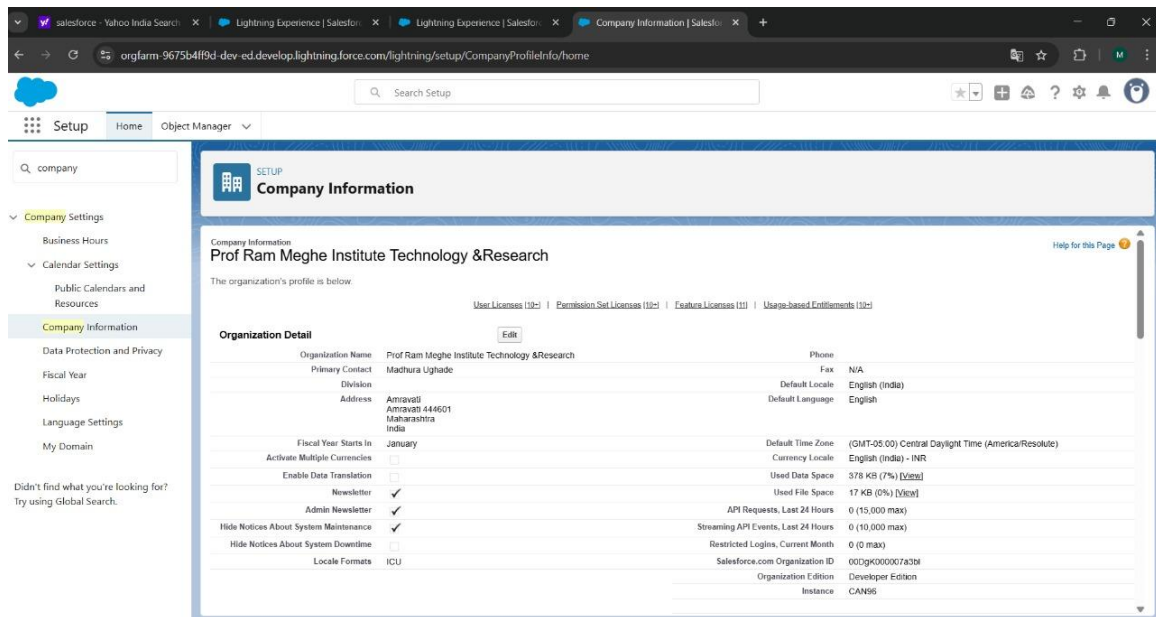


2.2 Business Hours & Holidays

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:

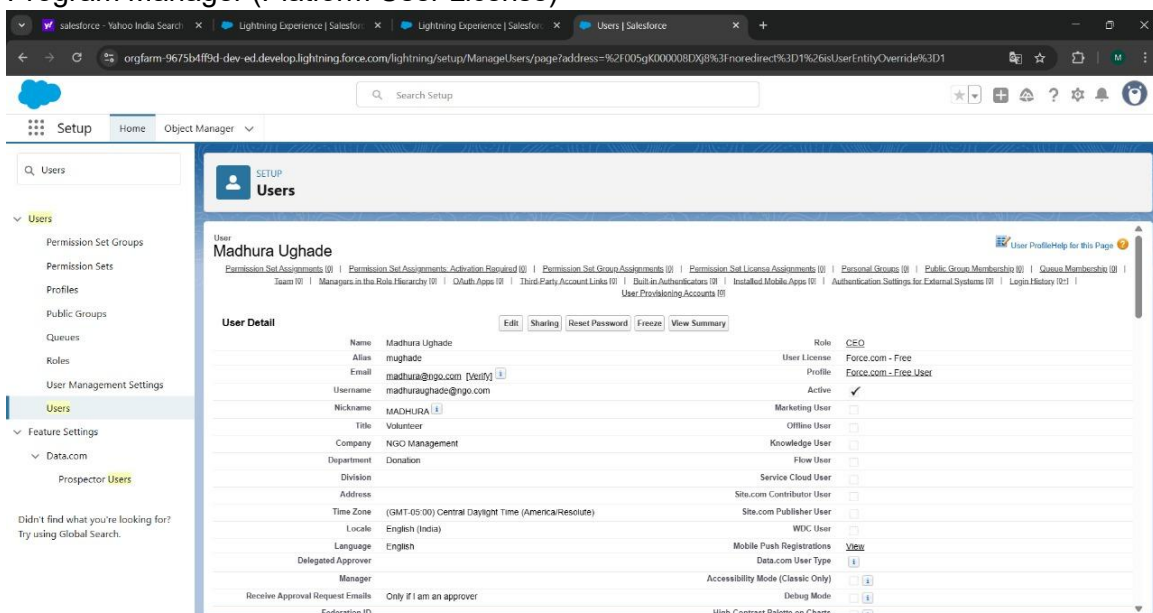
1. Go to Setup → Fiscal Year.
2. Select Standard Fiscal Year.
3. Set to April – March.

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)

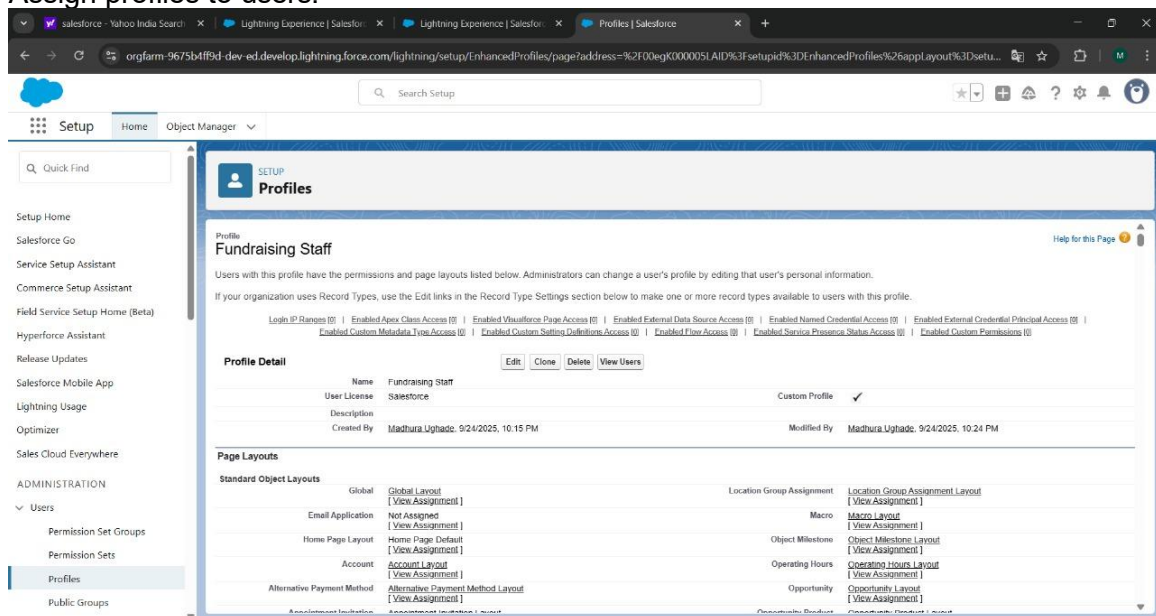


2.5 Profiles

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.

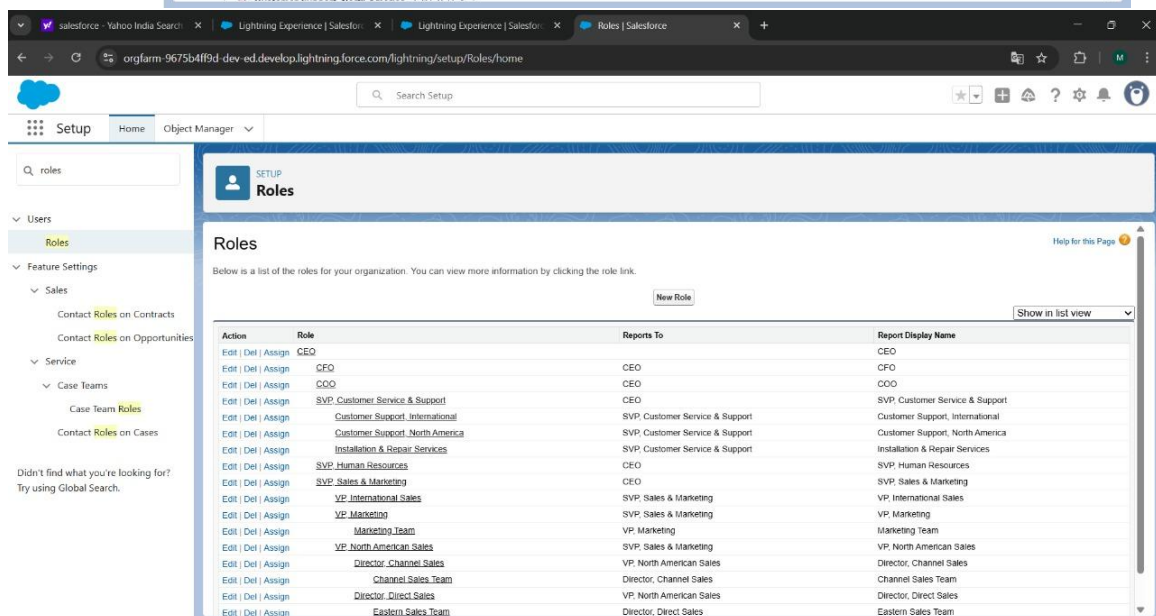
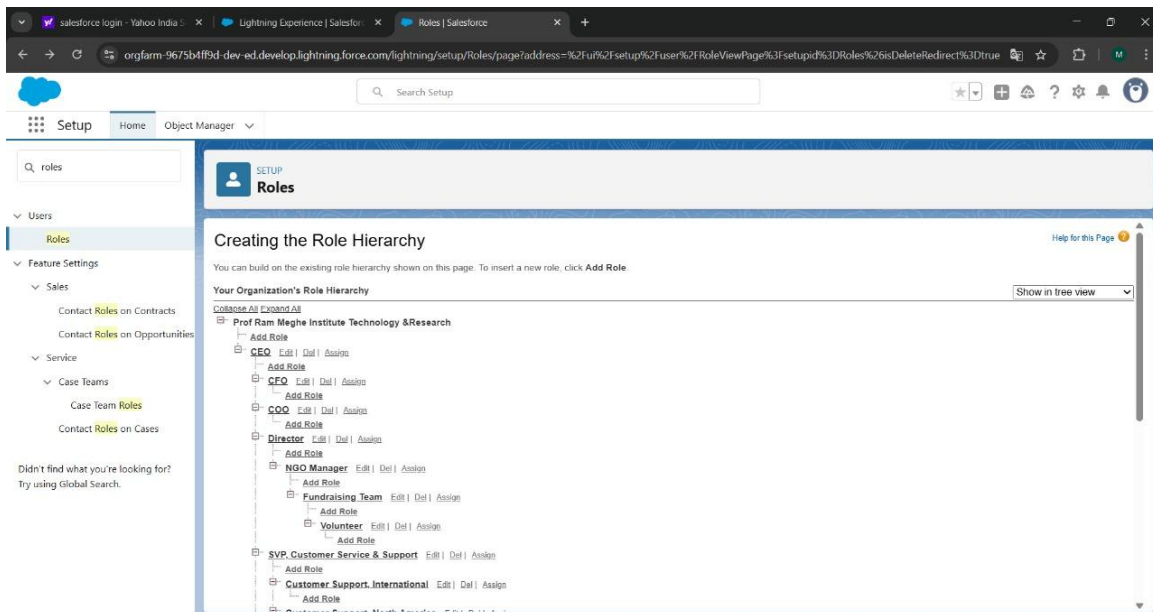
Steps:

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.

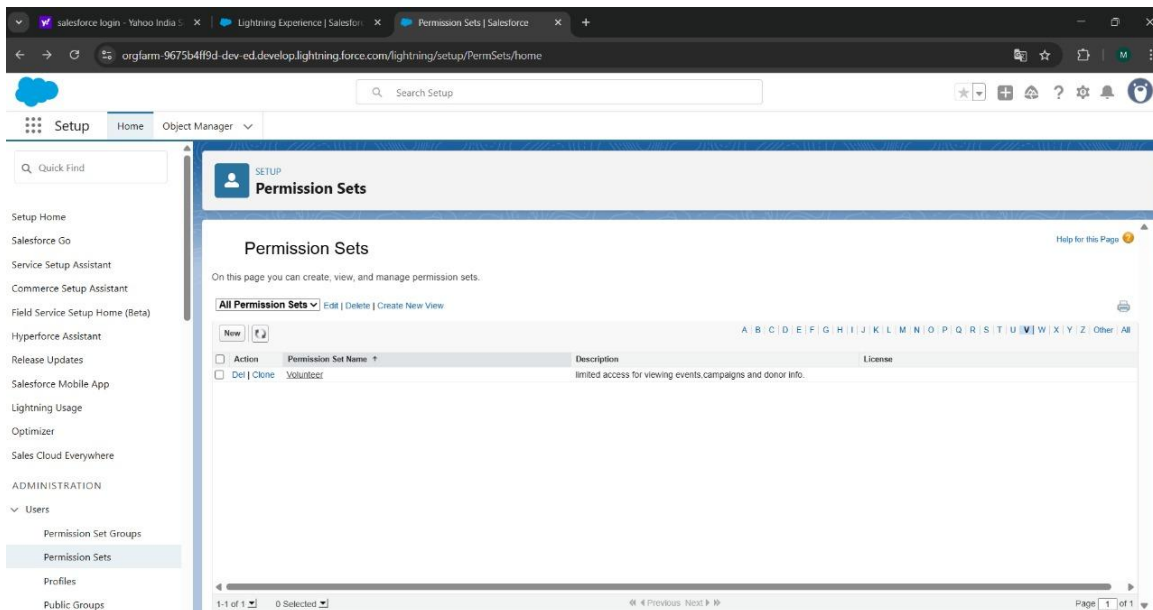


2.7 Permission Sets

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:

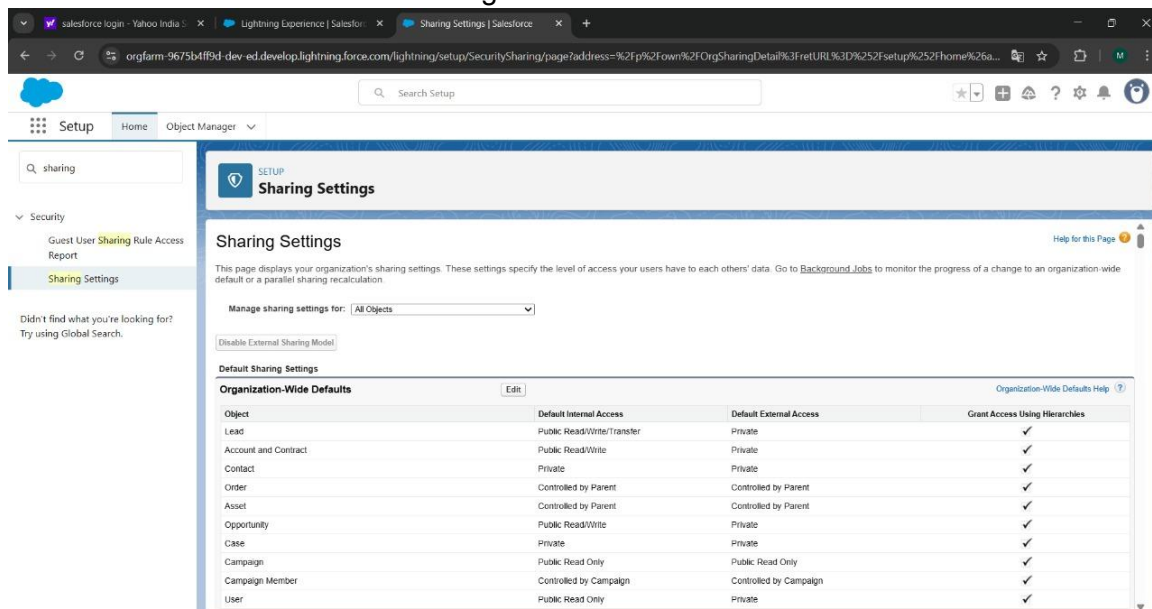
1. Go to Setup → Sharing Settings.
2. Configure OWD:
 - Donors → Private
 - Donations → Controlled by Parent (Donor)
 - Payments → Private
 - Campaigns → Public Read Only

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 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

