

NGO Donation & Volunteer Management Platform

1. Introduction

This document outlines the architecture and step-by-step plan for building an NGO Donation & Volunteer Management system using Salesforce Admin capabilities like Custom Objects, Flows, Record Types, Email Alerts, Validation Rules, Reports, Dashboards, Profiles, and Security settings.

2. Custom Objects and Relationships

Object Name	Description	Relationships
Donor	Stores donor details	Lookup to Donation
Volunteer	Stores volunteer details	Lookup to Participation
Event	Stores details of NGO events	Lookup from Donation & Participation
Donation	Records donations made by donors	Lookup to Donor & Event
Volunteer Participation	Tracks volunteer-event links	Lookup to Volunteer & Event

3. App Structure

App Name: NGO_Management

App Type: Custom App (Created in Classic)

Tabs Included: Donor, Volunteer, Event, Donation, Participation

4. Automation Using Flows

Flow Name	Trigger	Purpose
Flow 1	On Donation record creation	Send Thank-You Email to Donor
Flow 2	On Volunteer registration to an event	Auto-create Participation Record

5. Email Alerts

Alert Name	Trigger Condition	Recipient	Purpose
Donor_ThankYou	Donation Created	Donor	Acknowledge and thank donor
Volunteer_Confirmation	Volunteer registers for event	Volunteer	Confirm participation
Admin_HighDonation	Donation Amount > ₹10K	Admin	Notify large donation received

6. Record Types & Page Layouts

Object	Record Type	Layout Description
Donation	One-time	Fields: Amount, Date, Donor, Event
Donation	Monthly	Fields: Amount, Start Date, Frequency

7. Validation Rules

Rule Name	Applies To	Logic
Valid_Donation_Amount	Donation	Amount must be > 0
Future_Event_Date	Event	Event date must be in the future
Valid_Email_Format	Donor/Volunteer	Email must match correct pattern

8. Reports & Dashboards

Reports:

- Top Donors
- Donations per Event
- Volunteer Hours
- Monthly Donation Summary

Dashboard Components:

- Pie Chart: Donations by Type
- Bar Graph: Volunteer Participation per Event

- Metric: Total Donations This Month
- Table: Upcoming Events & Volunteer Count

9. Profiles and Access Control

Profile Name	Access Level
NGO Admin	Full Access to all Objects and Setup
Donor Manager	Access to Donor, Donation, and Reports
Volunteer Coordinator	Access to Volunteer, Event, and Participation
Read-Only User	View-only access for all objects

10. Field-Level Security

Applied after initial setup. Adjusted based on profile visibility. Sensitive fields like donation amount hidden from non-admin roles.

11. Testing Plan

Use Import Wizard to load sample data. Test Flows, Alerts, Validation Rules, and Reports. Role-based access testing with different profiles.

12. Final Outcome

A no-code Salesforce Admin solution for NGOs to manage donations, volunteers, events, communications, and reporting effectively.