

# NGO Donation & Volunteer Management Platform

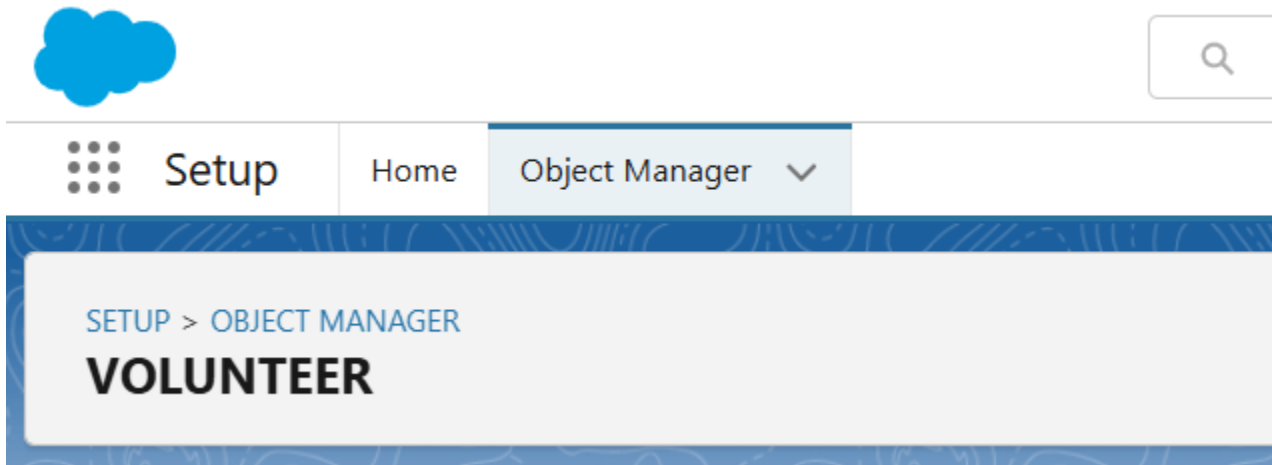
## Create Custom Objects (in Lightning Experience)

Steps to follow for each custom object:

1. Switch to Lightning
2. Go to Setup ► Object Manager ► Create ► Custom Object
3. Fill the form (Label, Plural Label, Record Name, etc.)
4. Save

Create these 5 custom objects:

Object Name	Purpose
Donor	Store donor info like name, email, phone
Volunteer	Store volunteer data – skills, availability
Event	Store event details – name, location, date
Donation	Tracks each donation linked to Donor & Event
Volunteer Participation	Junction object between Volunteer and Event

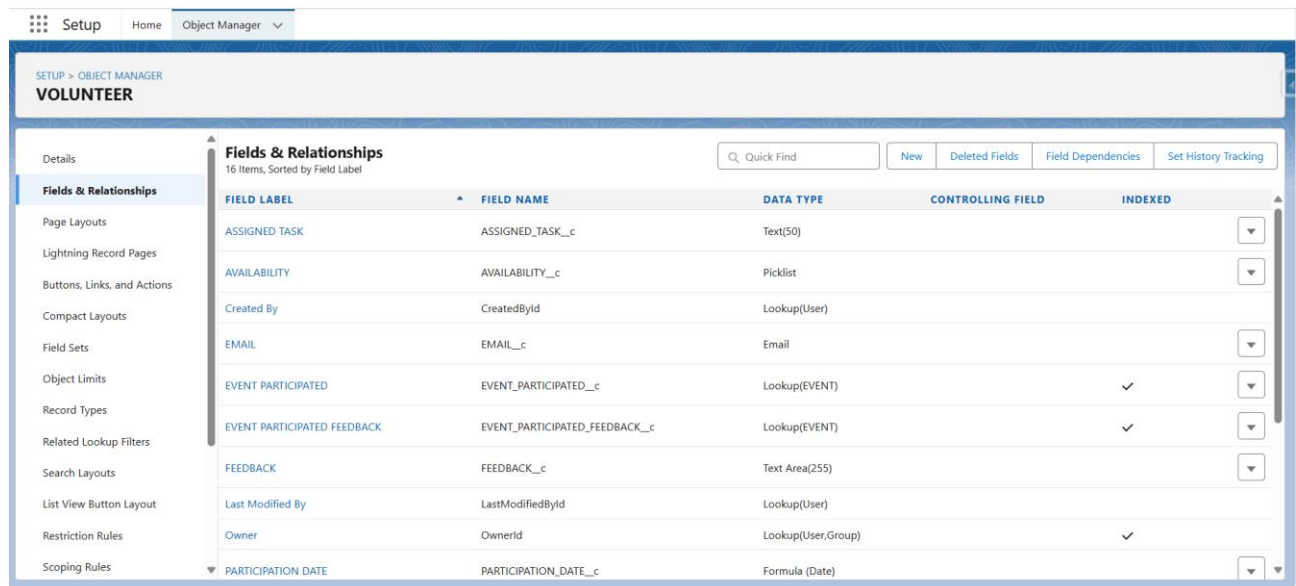


## Add Fields & Relationships

Go to each object ► Fields & Relationships ► New

Add fields like:

- Donor: Email, Phone, Total Donations
- Volunteer: Skills, Availability
- Event: Event Date, Location
- Donation: Amount, Donation Date, Lookup to Donor & Event
- Volunteer Participation: Lookup to Volunteer & Event



Setup > OBJECT MANAGER  
**VOLUNTEER**

Details

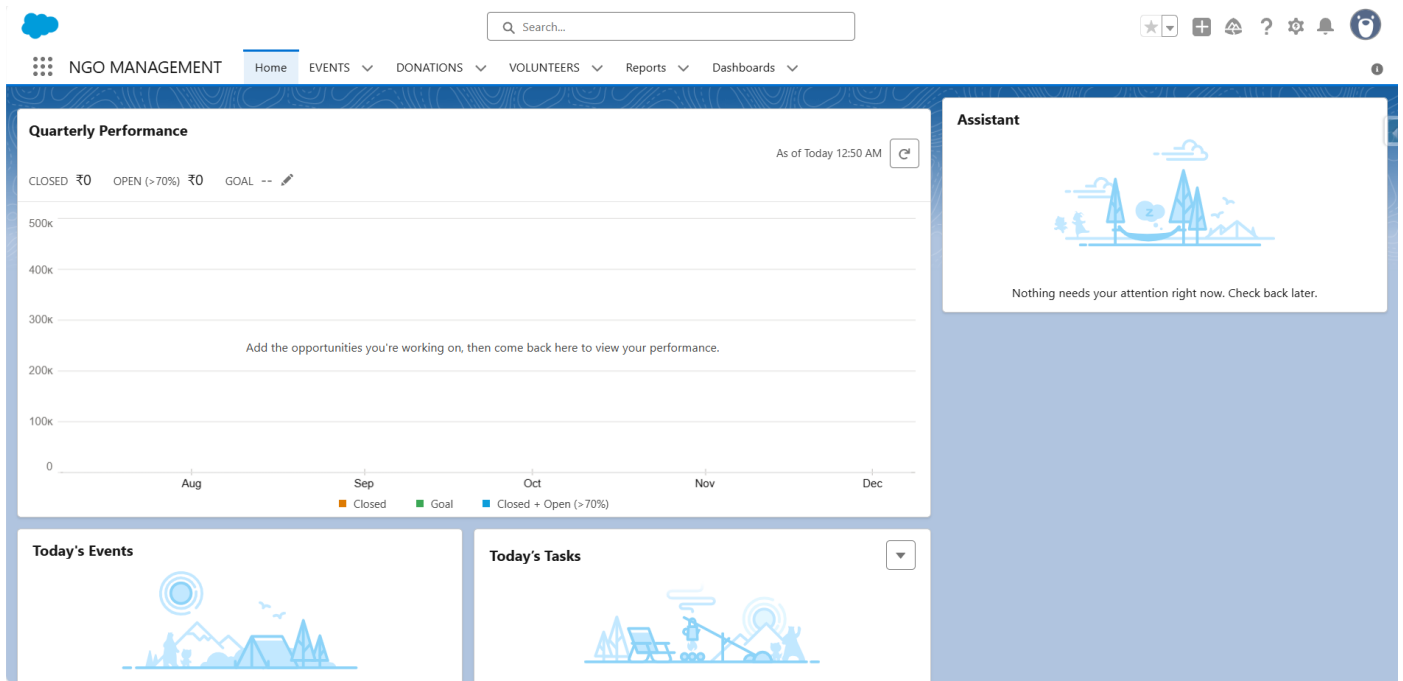
**Fields & Relationships**  
16 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
ASSIGNED TASK	ASSIGNED_TASK__c	Text(50)		
AVAILABILITY	AVAILABILITY__c	Picklist		
Created By	CreatedById	Lookup(User)		
EMAIL	EMAIL__c	Email		
EVENT PARTICIPATED	EVENT_PARTICIPATED__c	Lookup(EVENT)		✓
EVENT PARTICIPATED FEEDBACK	EVENT_PARTICIPATED_FEEDBACK__c	Lookup(EVENT)		✓
FEEDBACK	FEEDBACK__c	Text Area(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
PARTICIPATION DATE	PARTICIPATION_DATE__c	Formula (Date)		

## Create Custom App (in Salesforce Classic)

1. Switch to Salesforce Classic
2. Setup ► Create ► Apps ► New
3. App Label: NGO Management, App Name: NGO\_Management
4. Add tabs for custom objects
5. Choose visible profiles
6. Save



## Record Types & Page Layouts

For Donation object:

- Create Record Types: One-time Donation, Monthly Donation
- Create Page Layouts for each Record Type
- Assign to appropriate profiles

The screenshot shows a web browser window displaying the 'New DONATION: ONE TIME DONATION' form. The form is titled 'New DONATION: ONE TIME DONATION' and includes a search bar at the top. The form is divided into two main sections: 'Information' and 'DONATION TYPE'. The 'Information' section contains fields for 'Donation Name' (set to 'money'), 'Owner' (set to 'NISHITHA DAKSIA'), 'DONOR NAME' (set to 'ashika'), 'EMAIL' (set to 'deshidh@gmail.com'), 'PHONE' (set to '1111111111'), and 'DONATION TYPE' (set to 'FOOD'). The 'DONATION TYPE' section has a dropdown menu with options: 'FOOD', 'CLOTHES', 'GROCERIES', and 'MONEY'. The 'FOOD' option is selected. The form also includes buttons for 'Cancel', 'Save & New', and 'Save'.

The screenshot shows the 'New VOLUNTEER' form in the NGO Management system. The form is titled 'New VOLUNTEER' and includes a search bar at the top. The form is divided into two main sections: 'Select a record type' and 'VOLUNTEER LAYOUT'. The 'Select a record type' section has two radio buttons: 'VOLUNTEER LAYOUT' (selected) and 'FEEDBACK'. The 'VOLUNTEER LAYOUT' section has a dropdown menu with options: 'VOLUNTEER LAYOUT' and 'FEEDBACK'. The 'VOLUNTEER LAYOUT' option is selected. The form also includes buttons for 'Cancel' and 'Next'.

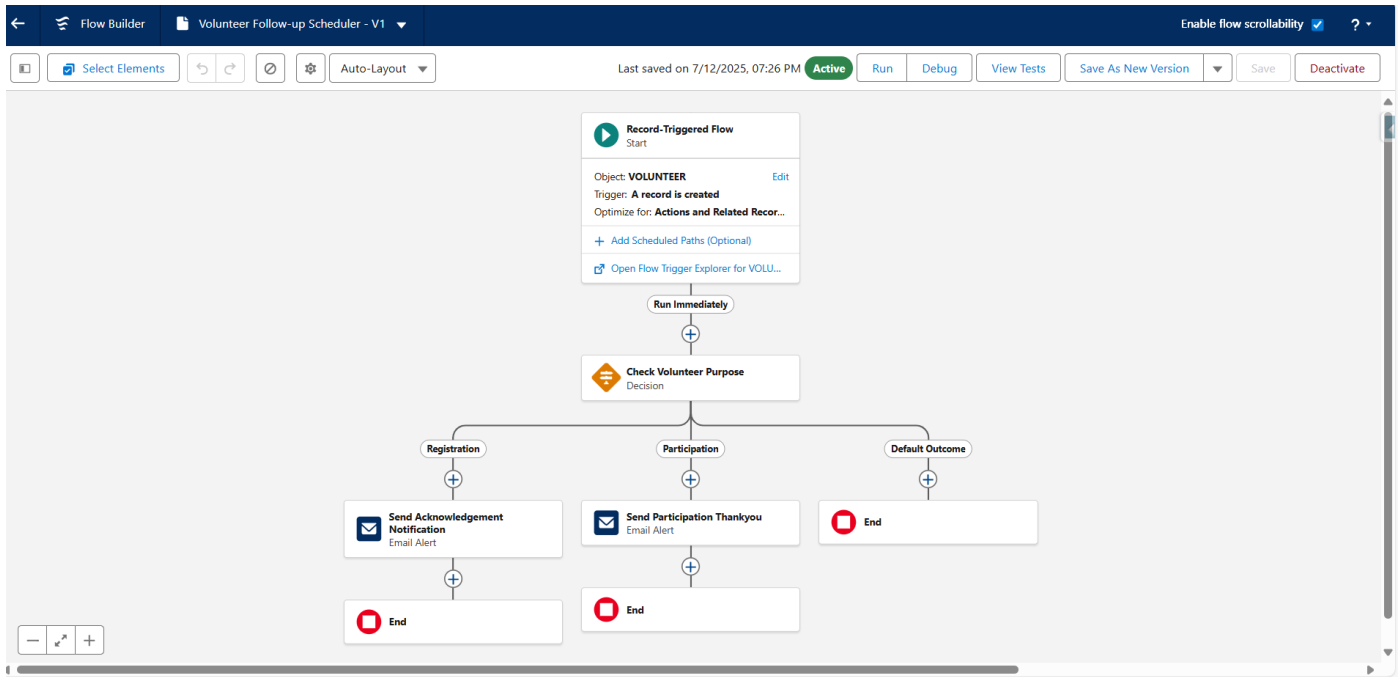
# Automation – Flows

## Flow 1: Thank-you Email to Donor

- Record-Triggered Flow on Donation
- Action: Send Email
- Save & Activate

## Flow 2: Create Participation Record

- Trigger: Volunteer registration
- Create Participation Record linked to Volunteer & Event
- Save & Activate



# Email Alerts

1. Setup ► Email Alerts ► New
2. Choose Object (Donation or Volunteer)
3. Define Recipients (Donor, Volunteer, Admin)
4. Use Predefined Email Templates

The screenshot shows the Salesforce Classic Email Templates interface. The left sidebar contains a search bar with 'email temp' and a navigation menu with 'Email' expanded, showing 'Classic Email Templates' and 'Lightning Email Templates'. The main content area is titled 'Classic Email Templates' and shows details for a 'Text Email Template' named 'New\_Event\_Notification'. The template is available for use and was created by NIKSHITHA DAMERA on 7/11/2025 at 3:12 AM. The 'Email Template Detail' section includes fields for Email Template Name, Template Unique Name, Encoding, Author, Description, and Created By. The 'Email Template' section shows the subject 'Upcoming Event – We'd Love Your Participation!' and a preview of the email body text, which includes a personalized greeting and event information.

**Classic Email Templates**

Text Email Template  
**New\_Event\_Notification**

Preview your email template below.

**Email Template Detail** [Edit] [Delete] [Clone]

Email Templates from Salesforce	Unfiled Public Classic Email Templates
Email Template Name	New_Event_Notification
Template Unique Name	New_Event_Notification
Encoding	Unicode (UTF-8)
Author	NIKSHITHA DAMERA [Change]
Description	
Created By	NIKSHITHA DAMERA, 7/11/2025, 3:12 AM

Available For Use ☒  
Last Used Date  
Times Used

Modified By NIKSHITHA DAMERA, 7/11/2025, 3:12 AM

[Edit] [Delete] [Clone]

**Email Template** [Send Test and Verify Merge Fields]

**Subject** Upcoming Event – We'd Love Your Participation!

**Plain Text Preview**

Dear (VOLUNTEER\_\_c.VOLUNTEER\_NAME\_\_c),

We have an exciting upcoming event:

(Volunteer\_\_c.Event\_Participated\_\_r.Name) on (Volunteer\_\_c.Event\_Participated\_\_r.Event\_Date\_\_c).

We'd be thrilled to have your support and participation!

Please let us know your availability.

## Validation Rules

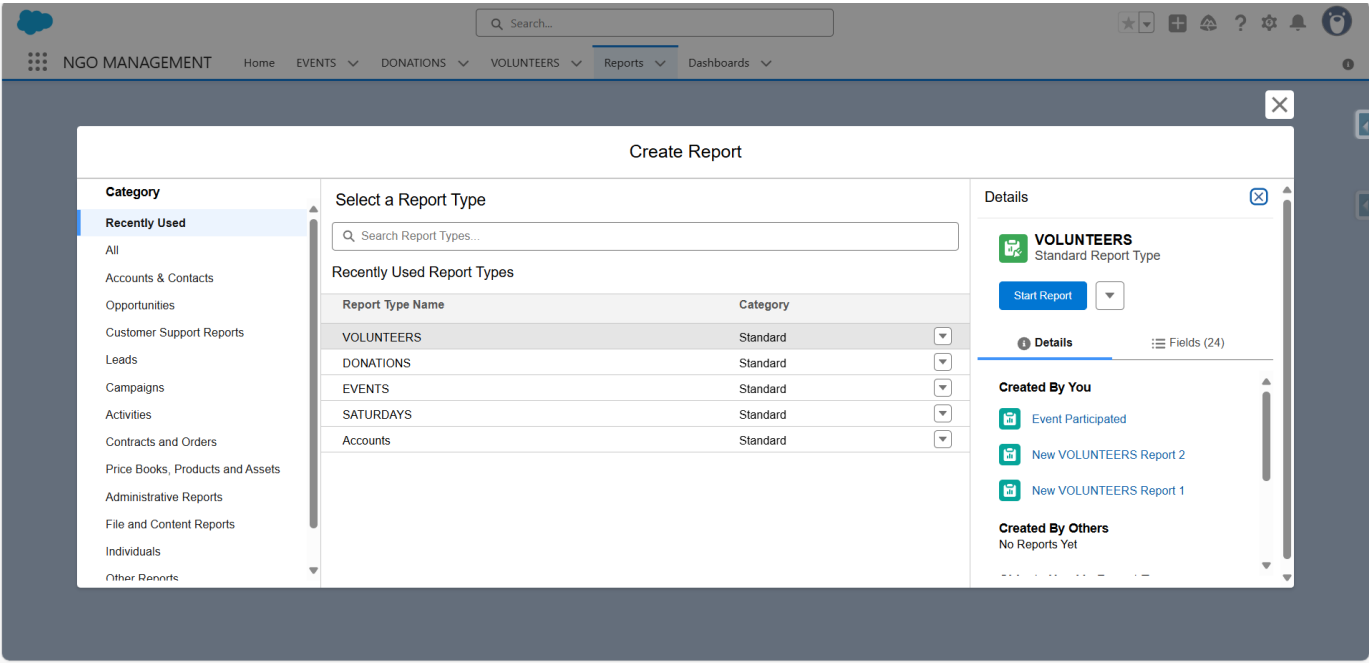
Setup ► Object Manager ► [Object] ► Validation Rules ► New  
Examples:

- Donation Amount > 0
- Donor Email must contain '@'
- Event Date > TODAY()
- Phone number must be 10 digits or null
- Event date must be in future
- If occasion is chosen date must be chosen

# Reports & Dashboards

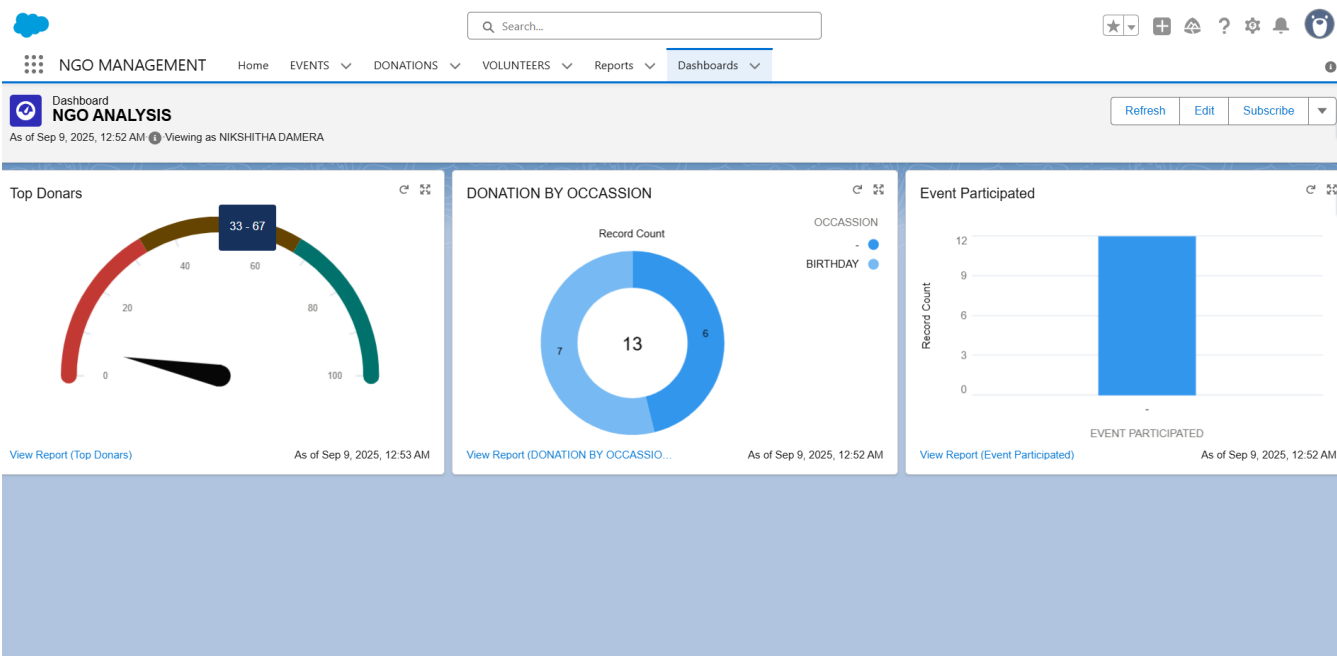
## Reports:

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



## Dashboards:

- Pie Chart: Donations by Type
- Bar Chart: Volunteers per Event
- Metric: Total Donations this Month
- Table: Upcoming Events & Volunteer Count





# Profiles, Roles & Security

1. Setup ► Profiles ► Clone ► Create:

- NGO Admin
- Donor Manager
- Volunteer Coordinator

2. Assign Tab Visibility, Object Permissions

3. Test with different users

The screenshot displays the Salesforce Setup interface for the 'NGO Admin' profile. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Profiles' and shows the 'NGO Admin' profile details.

**Profile Detail**

Name	User License	Description	Created By	Modified By
NGO Admin	Salesforce		NIKSHITHA DAMERA	NIKSHITHA DAMERA

**Page Layouts**

Standard Object Layouts	Global	Location Group
Global Layout	[View Assignment]	Location Group Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Location Group Assignment [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Macro [View Assignment]
Account	Account Layout [View Assignment]	Object Milestone [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Operating Hours [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Opportunity [View Assignment]

**Custom Object Permissions**

	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
DONATIONS	✓	✓	✓	✓	✓	✓	✓
EVENTS	✓	✓	✓	✓	✓	✓	✓
NIKKI	✓	✓	✓	✓	✓	✓	✓
SALES	✓	✓	✓	✓	✓	✓	✓

**Session Settings**

Session Times Out After	Session Security Level Required at Login
2 hours of inactivity	

**Password Policies**

User passwords expire in
90 days