

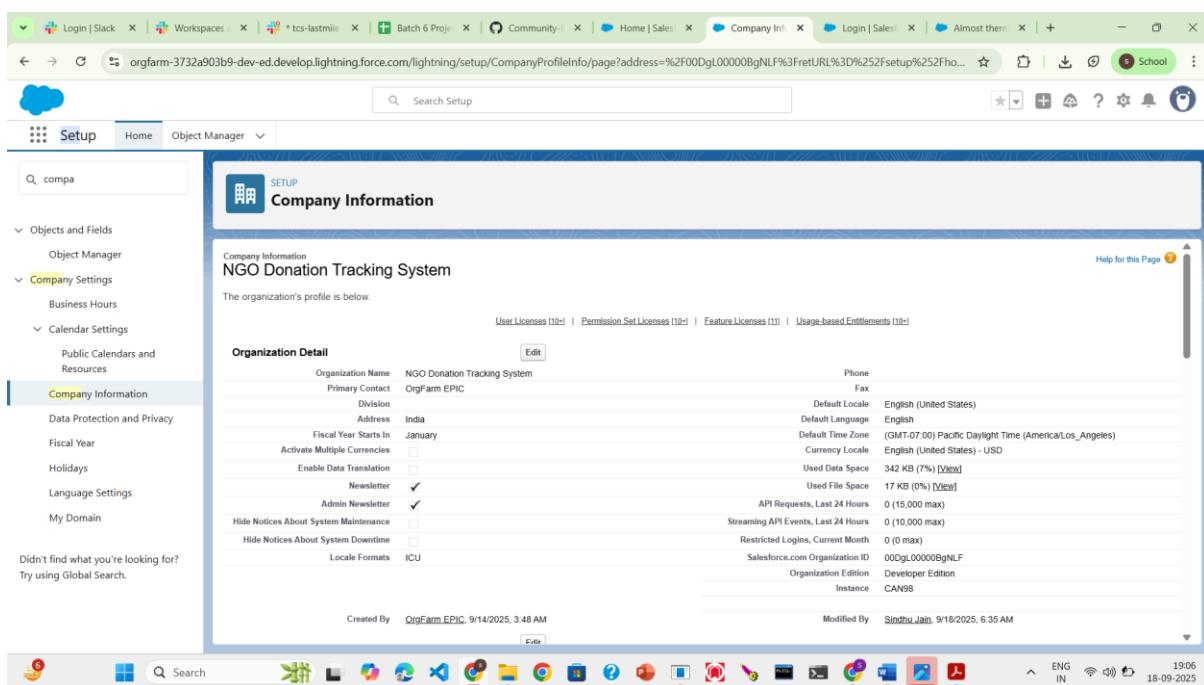
◆ Phase 2: Org Setup & Configuration

Salesforce Editions

- Use **Salesforce Developer Edition** for project.

Company Profile Setup

- **Company Name:** NGO Donation Tracking System
- **Default Currency:** INR (₹)
- **Locale & Language:** India (English, DD/MM/YYYY format)
- **Time Zone:** Asia/Kolkata (GMT+5:30)



Business Hours & Holidays

- **Business Hours:** 9:00 AM – 6:00 PM (Monday – Saturday).
- **Holidays:** National holidays (dummy setup).

Business Hours Detail

Business Hours Name	NGO Working Hours														
Business Hours	<table border="1"> <tr><td>Sunday</td><td>9:00 AM to 6:00 PM</td></tr> <tr><td>Monday</td><td>9:00 AM to 6:00 PM</td></tr> <tr><td>Tuesday</td><td>9:00 AM to 6:00 PM</td></tr> <tr><td>Wednesday</td><td>9:00 AM to 6:00 PM</td></tr> <tr><td>Thursday</td><td>9:00 AM to 6:00 PM</td></tr> <tr><td>Friday</td><td>9:00 AM to 6:00 PM</td></tr> <tr><td>Saturday</td><td>9:00 AM to 6:00 PM</td></tr> </table>	Sunday	9:00 AM to 6:00 PM	Monday	9:00 AM to 6:00 PM	Tuesday	9:00 AM to 6:00 PM	Wednesday	9:00 AM to 6:00 PM	Thursday	9:00 AM to 6:00 PM	Friday	9:00 AM to 6:00 PM	Saturday	9:00 AM to 6:00 PM
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Saturday	9:00 AM to 6:00 PM														

Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)

Default Business Hours:

Active:

Created By: Sindhu Jain 9/18/2025, 10:14 AM

Last Modified By: Sindhu Jain 9/18/2025, 10:19 AM

Holidays (0)

No records to display

Fiscal Year Settings

- Using the **Standard Fiscal Year (Jan–Dec)** for simplicity.
- Ensures all **donations, donor activities, and fundraising campaigns** can be tracked on a yearly basis.
- Allows **yearly donation reports** to be generated easily.

Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

Change Fiscal Year Period

Name: NGO Donation Tracking System
Fiscal Year Start Month: January
Fiscal Year is Based On: The ending month

Warning: Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

User Setup & Licenses

Defines the main user roles for NGO system

- **Admin User** – Full system access to manage configurations, permissions, profiles and reports.
- **NGO Staff / Volunteer User** – Access to manage donor records, enter donation details, and schedule donation drives/campaigns.
- **Auditors / Reviewer User** – Ensures accountability by monitoring donor contributions and fund utilization.

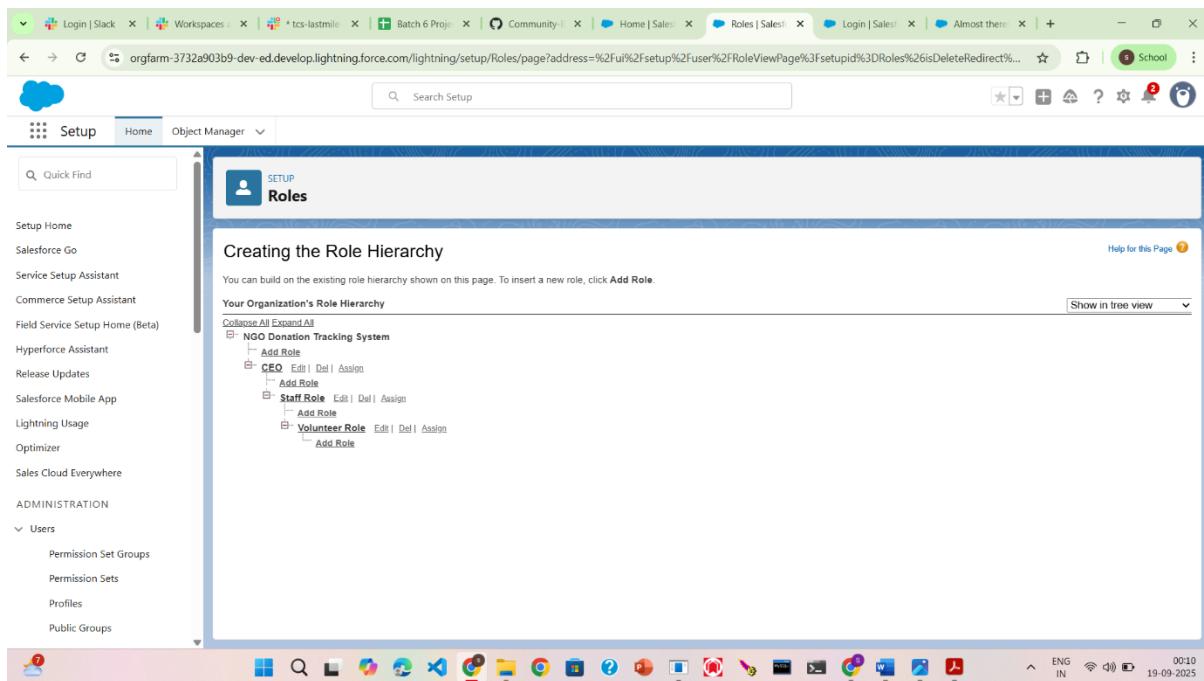
The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The left sidebar includes sections like 'User Management Settings', 'Feature Settings', 'Service', and 'User Interface'. The main content area displays a list of users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The list includes users such as Chatter Expert, Chatter, OEPIC, Jain_Sindhu, Test_Donor, User_Integration, User_Security, and User_Staff. The interface has a standard top navigation bar with tabs like Home, Object Manager, and a search bar.

Profiles

- **Admin / System Administrator Profile** – Full system access with CRUD (Create, Read, Update, Delete) on all custom objects (Donor, Donation, Campaign, Beneficiary).
- **NGO Manager (Custom Profile)** –
 - Full CRUD on Donor, Donation, Campaign objects.
 - View/edit reports & dashboards.
 - No access to modify system settings or users.
- **Volunteer Profile** – Read-only access to Donor, Donation, Campaign and Reports/Dashboards.

Roles

- **Admin Role (CEO)** – Top-level, can see all records below in role hierarchy.
- **Staff Role** –manages volunteers, sees records owned by volunteers.
- **Volunteer Role** –normal user role for field staff who enter donations.



Permission Sets

- **Donation Notification Manager** → Grants permission to send donor reminders and alerts.
- **Donation Report Viewer** → Grants access to view reports/dashboards without editing data.
- **Campaign Editor** → Edit Campaign description, goals, and timelines.

OWD (Org-Wide Defaults)

- **Donor (Custom Object)** → Private.
- **Donation** → Private.
- **Campaign** → Public Read Only.

The screenshot shows the Salesforce Sharing Settings page. The left sidebar includes links for Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, Administration (Users, Data, Email), Platform Tools, and Subscription Management. The main content area is titled "Sharing Settings" and lists sharing rules for various objects:

Object	Sharing Rule	Access Level	Status
Streaming Channel	Public Read/Write	Private	✓
Tableau Host Mapping	Public Read Only	Private	✓
User Presence	Public Read Only	Private	✓
User Provisioning Request	Private	Private	✓
Waitlist	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Campaign	Public Read Only	Private	✓
Donation	Private	Private	✓
Donor	Private	Private	✓

Below the table, there is a section titled "Other Settings" with checkboxes for "Manager Groups", "Secure guest user record access" (checked), and "Require permission to view record names in lookup fields".

Sharing Rules

- **Donation Sharing Rule:** Records owned by volunteers shared with **NGO Manager**.
- **Donor Sharing Rule:** Records owned by Volunteers shared with NGO Manager

Login Access Policies

- Allowed the CEO /Admin to log in as NGO Staff or Volunteers to troubleshoot donation and campaign issues.

Dev Org Setup

- Salesforce **Developer Org** will be the primary workspace for configuration and implementation.
- All testing, validation, and demo preparation will be performed within this environment.

Deployment Basics

- Not applicable for this project, as all configurations and development will be done directly in the Salesforce Developer Org.