

Phase 3: Data Modeling & Relationships

Standard & Custom Objects

- Standard Objects Used: Reports, Dashboard.
- Custom Objects Created:
 1. Donation – Stores donor details and donation information.
 2. Volunteer – Stores volunteer registration, skills, and participation.
 3. Event – Stores NGO events where volunteers participate and donations are linked.

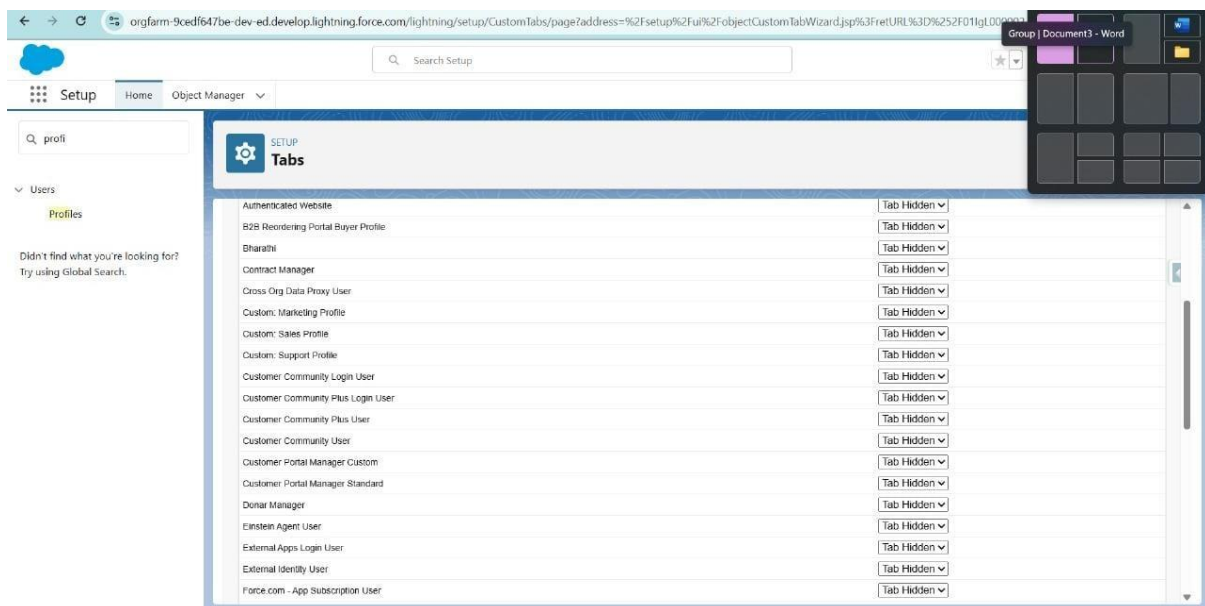
Go to **Setup** → **Object Manager** → **Create** → **Custom Object**

For each object, check:

- All Optional Features
- Deployment Status -> Deployed
- Allow Search
- Object Creation Options (Available only when custom object is first created): (Check both)

It will open the custom object tab page

- Choose any tab style -> next
- In the Apply one tab visibility to all profiles select **Tab Hidden** & click **Apply a different tab visibility for each profile** option, so that we can add only our required profiles (System Administrator, Donor Manager, NGO Admin, Volunteer Coordinator) for the object. So, select default on for only those 4 profiles



- Click Next -> In step 3 uncheck Include tab & save.

Custom Fields

1. Donation Object

Field Label	Data Type
Donor Name	Text
Email	Email
Phone	Phone
Donation Type	Picklist Multiselect (Money, Food, Clothes, Groceries, Other)
Donation Amount	Currency
Donation Date	Date
Reason	Text Area
Occasion	Picklist (Birthday, Marriage, Health, Death, Other)
Occasion Date	Date
Related Event	Lookup Relationship (Event)
IT Certificate Sent	Checkbox
Notes	Long Text Area
Payment Method	Picklist (UPI, Card, Bank Transfer, Cash, Not Applicable)
Monthly Start Date	Date
Monthly End Date	Date
Frequency	Picklist (Monthly, Bi-monthly, Quarterly)
Auto Renewal	Checkbox

2. Volunteer Object

Field Label	Data Type
Volunteer Name	Text
Email	Email

Field Label	Data Type
Phone	Phone
Skills	Text Area
Availability	Picklist (Weekdays, Weekends, Anytime)
Participation Date	Date
Assigned Task	Text
Event Participated	Lookup Relationship (Event)
Feedback	Text area
Wants Notification	Checkbox

3. Event Object

Field Label Data Type

Event Name	Text
Event Date	Date
Location	Text
Description	Long Text Area

Record Types

Create a record type for Donation object

One Time Donation

- Set up->object Manager-> Donation ->Record Type ->New
- Record Type label --> One Time Donation
- Set Make Available for Donor Manager, NGO admin, System Administrator, Volunteer Coordinator
- Click Next, Select Apply page layout as One Time Donation
- Click Save

Monthly Donation

- Set up->object Manager->Donation ->Record Type ->New
- Record Type label-->Monthly Donation
- Set Make Available for Donor Manager, NGO admin, System Administrator, Volunteer Coordinator
- Click Next, Select Apply page layout as Monthly Donation
- Click Save

Create a record type for Volunteer object

Volunteer Registration

- Set up->object Manager->Volunteer ->Record Type ->New
- Record Type label-->Volunteer Registration
- Set Make Available for Donor Manager, NGO admin, System Administrator, Volunteer Coordinator
- Click Next, Select Apply page layout as Volunteer Pagelayout
- Click Save

Volunteer Feedback

- Set up->object Manager->Volunteer ->Record Type ->New
- Record Type label-->Volunteer Feedback
- Set Make Available for Donor Manager, NGO admin, System Administrator, Volunteer Coordinator
- Click Next, Select Apply page layout as Feedback
- Click Save

Page Layouts

- **Donation Layouts:**
 - One-Time Donation Layout (basic donation info).
 - Monthly Donation Layout (includes monthly start, end dates, frequency, auto-renewal).
- **Volunteer Layouts:**
 - Registration Layout (basic contact + skills + availability).

- Feedback Layout (event participated, tasks, feedback fields).