

# Phase 2: Org Setup & Configuration

## a. Salesforce Editions

- Used Salesforce Developer Edition (free org) for implementation.
- Chosen because it provides all features (Admin + Developer) required for building and testing NGO use case.

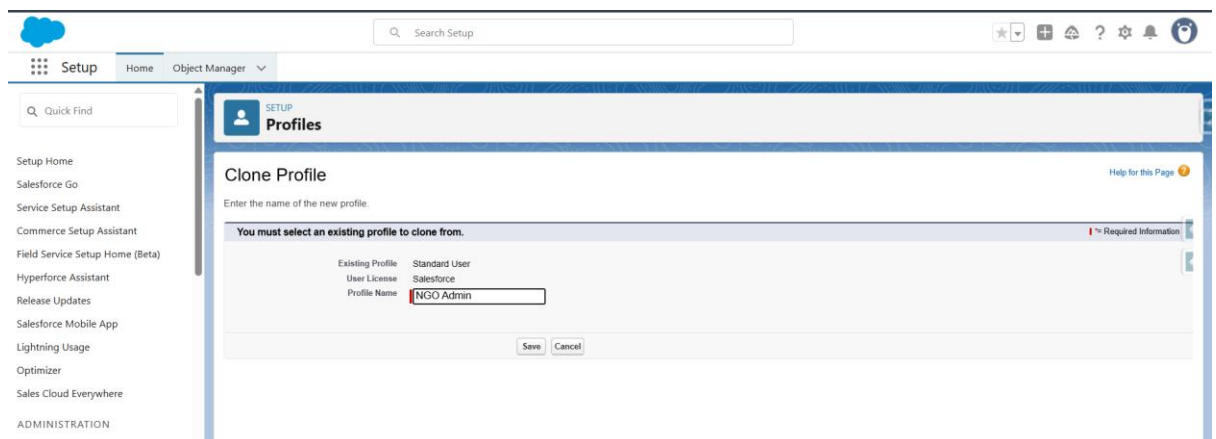
## b. Profiles

In our Project we need 3 main profiles –

1. NGO Admin (who had full access on the app)
2. Donor Manager (who had access for donor object and event object)
3. Volunteer Coordinator (who had access for volunteer and event objects)

Home -> Quick Find (Search Profiles)

- Clone “Standard User” & create those 3 profiles one by one & save.
- NGO Admin, Volunteer Coordinator, Donor Manager



## c. OWD (Organization-Wide Defaults)

1. **Donation Object:** Private (only owners and higher roles can see).
2. **Volunteer Object:** Private (for confidentiality).
3. **Event Object:** Public Read-Only (everyone can see events but only assigned users can edit).

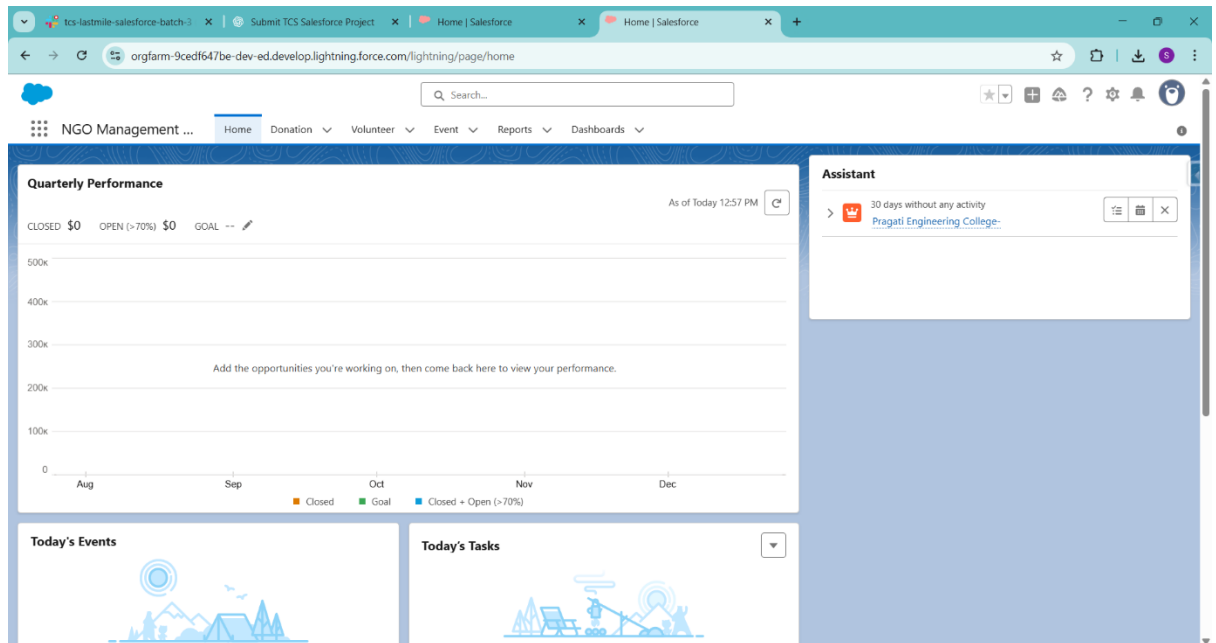
## d. Dev Org Setup Phase

Created **Custom App NGO Management** with tabs for Donation, Volunteer, Event, Reports, Dashboard.

In our profile click Switch to Salesforce Classic

- Go to Setup (Classic) → Create → Apps → New
- Name: NGO Management
- Add the tabs: **Donation, Volunteer, Event, Reports, Dashboards**

Assign to: **System Administrator, NGO Admin, Donor Manager, Volunteer Coordinator** profiles



## e. Sandbox Usage

In this Developer Org project, main testing was done directly in dev environment.