Phase 10: Final Presentation & Demo Day

Objective

To present and demonstrate the end-to-end Salesforce solution built for NGOs to:

- Track **donations** (one-time & monthly)

- Manage **volunteers** (registration, participation, scheduling)

- Organize **events**

- Automate **communications** (emails, reminders, acknowledgements)

- Provide **real-time dashboards** for NGO decision-making

Solution Overview

Core Modules Implemented

- **Donation Management** → Capture donor details, donation types, and occasions.

- **Volunteer Management** → Registration, task assignment, participation tracking.

- **Event Management** → Admins can create/manage events, link donors & volunteers.

- **Automated Emails** → Thank-you notes, birthday/anniversary wishes, monthly reminders.

- **Reports & Dashboards** → Top donors, donation trends, volunteer participation.

User Roles & Profiles

- **NGO Admin** → Full access

- **Donor Manager** → Donations & Events

- **Volunteer Coordinator** → Volunteers & Events

Demo Walkthrough

1. **Donation Creation**

   o   Enter donor info & donation type

   o   Auto-trigger thank-you email

   o   Monthly donation → auto reminder setup

2. **Volunteer Registration**

- Capture skills, availability, assigned event

- Trigger welcome & participation emails
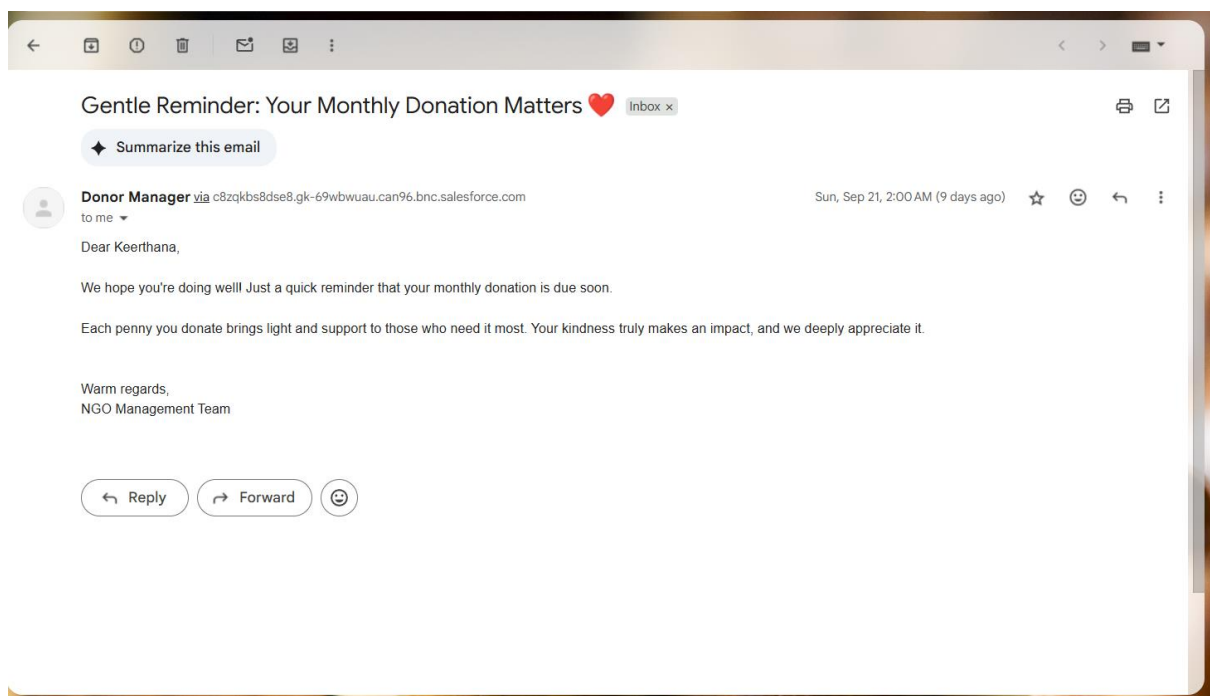
3. **Event Management**

- Create event (name, date, location, description)
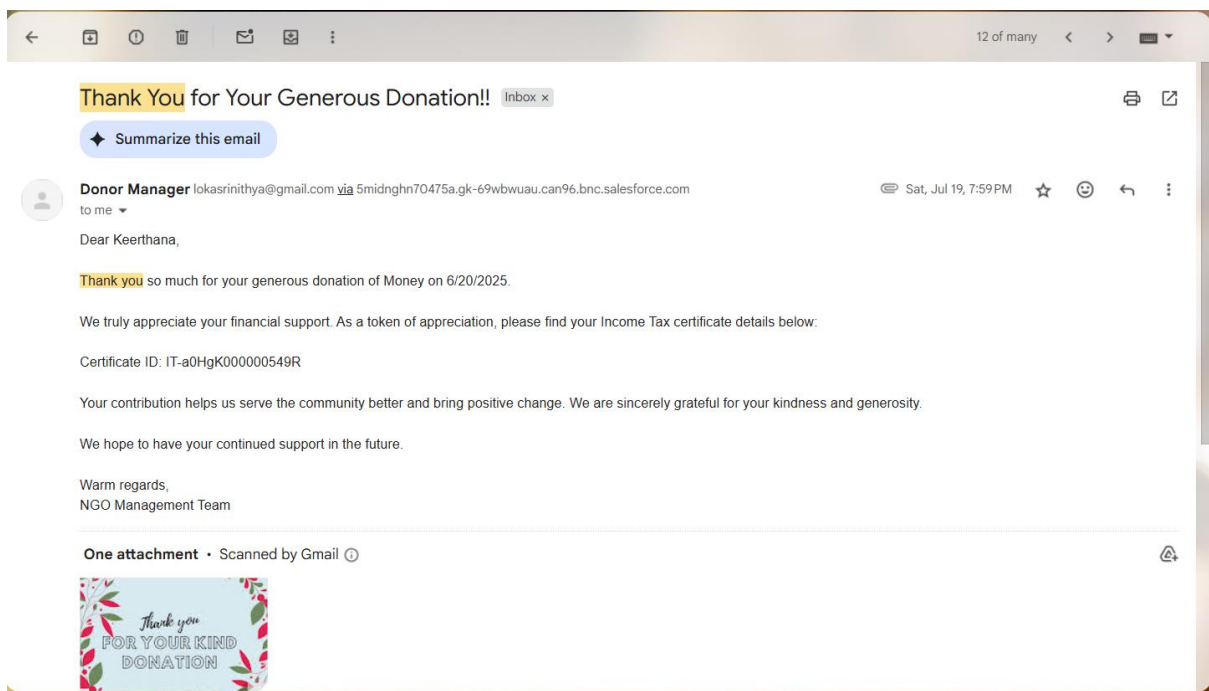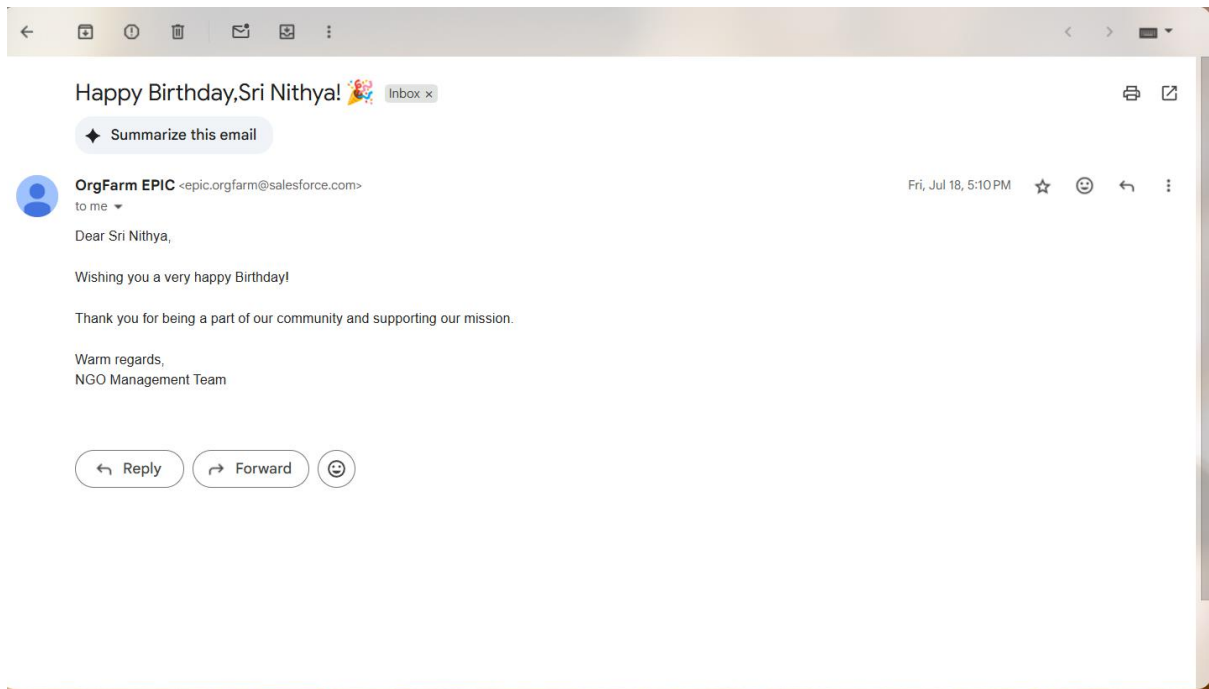
- Link donors & volunteers

4. **Automation in Action**

- Flows sending occasion emails & monthly reminders

- Volunteer acknowledgement mails

5. **Dashboards & Reports**

- Donations by Occasion (Bar Chart)

- Volunteers by Event (Donut Chart)

- Top Donors (Lightning Table)

Gentle Reminder: Your Monthly Donation Matters ❤️ Inbox ×

✦ Summarize this email

Donor Manager via c8zqkbs8dse8.gk-69wbwuau.can96.bnc.salesforce.com   Sun, Sep 21, 2:00 AM (9 days ago)

to me ▾

Dear Keerthana,

We hope you're doing well! Just a quick reminder that your monthly donation is due soon.

Each penny you donate brings light and support to those who need it most. Your kindness truly makes an impact, and we deeply appreciate it.

Warm regards,
NGO Management Team

↩ Reply   ↪ Forward   ☺

Achievements

- Fully functional **end-to-end NGO management system**

- **Automation-first design** using Flows & Email Alerts

- **Clean UI** with record types and page layouts

- **Secure access control** with profiles & FLS

- **Data accuracy** with validation rules

Release Notes Highlights (v1.0)

- Implemented **custom objects**: Donation, Volunteer, Event

- Configured **record types** for Donation & Volunteer

- Built **flows** for all major automation

- Designed **reports & dashboards** for NGO insights

- Tested with sample data (10 Donations, 10 Volunteers, 7 Events)

Future Enhancements

- Online payment integration (Razorpay/Stripe API)

- Mobile responsiveness via Salesforce Mobile App / LWCs

- Donor insights using Einstein AI

- Smart volunteer-event matching based on skills & availability

Final Notes

This Salesforce solution will help NGOs:

- Save time by automating communications

- Improve donor & volunteer engagement

- Get real-time insights into impact & contributions

- Scale operations with a **centralized CRM system**