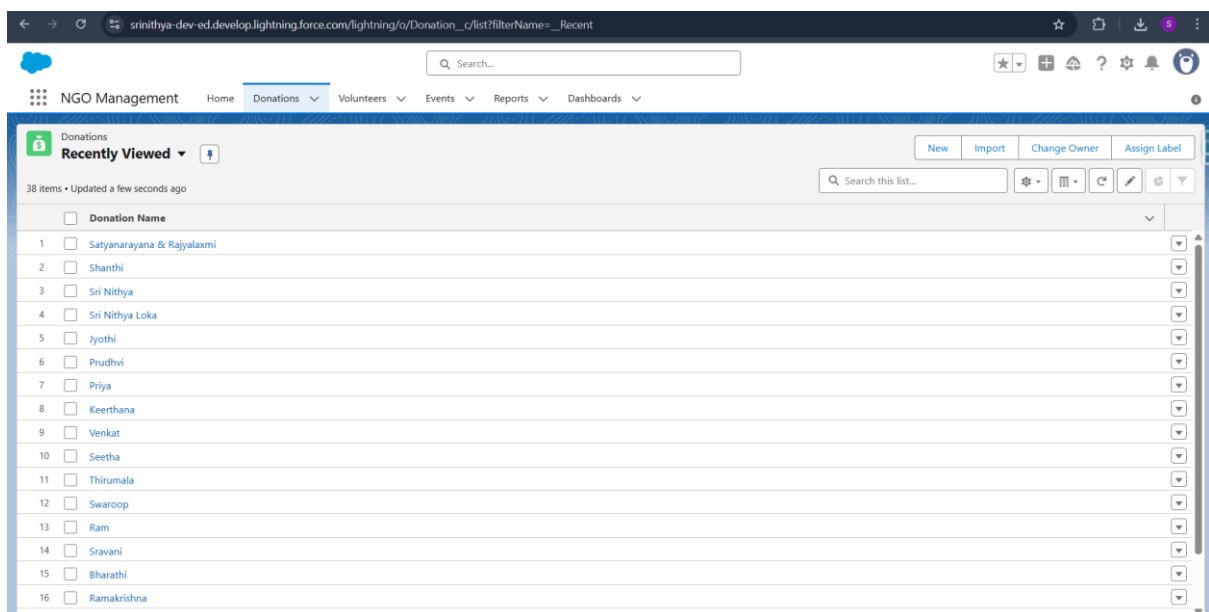# Phase 2: Org Setup & Configuration

1. Salesforce Org Setup

- Created a **Salesforce Developer Edition Org** for project development.

- Set up a **custom App: NGO Donations & Volunteer Management** with navigation tabs for:

    o Donations

    o Volunteers

    o Events

    o Reports & Dashboards

2. User Roles & Profiles

Defined **three custom roles** with controlled access:

- **NGO Admin**

    o Full access to all objects and tabs.

    o Responsible for system setup, data management, and reporting.

- **Donor Manager**

    o Access to Donations & Events.

    o Can create, read, edit, and report on donation records.

    o Restricted from volunteer data.

- **Volunteer Coordinator**
  - Access to Volunteers & Events.
  - Can manage volunteer registrations, skills, and event assignments.
  - Restricted from donation data.

3. Tabs & Navigation

- Added **Custom Tabs** for Donation, Volunteer, and Event objects.
- Grouped navigation items into **App Launcher** for easy access.
- Set **Default Landing Page** to Dashboard for NGO Admin profile.

4. Page Layouts & Record Types

Configured record types and layouts for usability:

- **Donation Object**
  - Record Types: One-Time, Monthly
  - Layouts:
    - One-Time Donation Layout (simple fields: donor info, amount, occasion).
    - Monthly Donation Layout (recurrence fields included).
- **Volunteer Object**
  - Record Types: Registration, Feedback
  - Layouts:
    - Volunteer Registration Layout (skills, availability, assigned tasks).
    - Volunteer Feedback Layout (event participation, comments).
- **Event Object**
  - Single layout including event details (name, date, location, description).

5. Security & Access Control

- **Profiles & Field-Level Security (FLS)** applied:
  - Sensitive donor fields (e.g., phone, email) restricted to NGO Admin & Donor Manager.

- Volunteer-specific data restricted to NGO Admin & Volunteer Coordinator.
- **Tab Visibility** customized:
    - Donor Manager sees Donations + Events.
    - Volunteer Coordinator sees Volunteers + Events.

6. Branding & Customization

- Customized the app name and icon to **NGO Manager**.
- Set **Lightning App Theme** with NGO branding color scheme.
- Assigned **Default Home Page** with a Dashboard component.

7. Outcome of Phase 2

At the end of this phase, the Salesforce Org was ready with:

- A working app structure (objects, tabs, record types, layouts).
- Clearly defined roles and permissions.
- Secure access and navigation for different user types.
- Branded and user-friendly interface for NGO operations.