

Phase 7: Integration & External Access

Objective

To enable the system to connect with **external platforms and users outside Salesforce** for future scalability — such as online payments, donor portals, or volunteer mobile apps — while maintaining security and reliability.

Current Implementation

- **No third-party integrations** in Version 1.0.
- System runs **fully within Salesforce native tools** (Objects, Flows, Email Alerts, Dashboards).
- External access is limited to **email communication** with donors and volunteers.

Planned Integrations (Future Scope)

1. Online Payment Gateway Integration

- **Need:** Collect online donations directly into Salesforce.
- **Tools:**
 - REST API integration with Stripe or Razorpay.
 - Apex HttpRequest & HttpResponse classes to handle API calls.
- **Expected Benefit:** Auto-create donation records once payment is confirmed.

2. Donor & Volunteer Portal

- **Need:** Allow donors and volunteers to self-register, donate, and track participation.
- **Tools:**
 - Salesforce **Experience Cloud** (Community Portal).
 - Role-based access → Donor Portal, Volunteer Portal.
- **Expected Benefit:** Improves engagement, reduces manual data entry.

3. Mobile Accessibility

- **Need:** Volunteers need mobile access during events.
- **Tools:**
 - Salesforce Mobile App (Lightning Experience).
 - Option to build **LWC (Lightning Web Components)** for mobile responsive UI.
- **Expected Benefit:** Real-time updates on event participation and donation confirmations.

4. External Email/Calendar Sync (Optional)

- **Need:** Sync events with Gmail/Outlook for volunteers.
- **Tools:** Salesforce **Calendar Integration & Einstein Activity Capture**.
- **Expected Benefit:** Automatic calendar reminders for upcoming events.

Security & Access Considerations

- Use **Profiles, Permission Sets, and FLS** to secure external data access.
- Enforce **OAuth 2.0 authentication** for APIs.
- Apply **IP restrictions & session settings** for Experience Cloud portals.
- Store sensitive data (like donor payment info) securely and comply with **PCI-DSS**.

Tabular Summary

Integration Area	Tool/Method	Purpose	Status
Payment Gateway	REST API (Stripe/Razorpay)	Capture online donations and auto-create Donation records.	Planned (Future)
Donor & Volunteer Portal	Salesforce Experience Cloud	Self-service for donors and volunteers.	Planned (Future)
Mobile Access	Salesforce Mobile App / LWC	Allow volunteers/admins to access data on the go.	Partially Ready
Calendar Sync	Einstein Activity Capture	Sync event details with Gmail/Outlook calendars.	Optional/Future

Integration Area Tool/Method		Purpose	Status
Current	Email Alerts via Flows	Acknowledgement & reminders to donors/volunteers.	Implemented (v1.0)
External Access			

Benefits

- Streamlines donation collection and volunteer onboarding.
- Increases transparency & trust by providing self-service portals.
- Reduces manual effort for NGO admins.
- Ensures system scalability for larger NGO operations.