

# Salesforce NGO Donation & Volunteer Management System

## Daily Development Log

This document records the day-wise development progress of the Salesforce Capstone Project – NGO Donation & Volunteer Management System. Each day corresponds to a project phase and includes tasks completed, deliverables, and status updates.

### Day 1 – Phase 1: Problem Understanding & Industry Analysis

#### Tasks Completed:

- Requirement Gathering: Identified main features – donor registration & donation tracking, volunteer registration & event assignment, event management, automated emails, reporting.
- Stakeholder Analysis: Defined key stakeholders – NGO Admin, Donor Manager, Volunteer Manager, Donors, Volunteers.
- Business Process Mapping: Outlined donor cycle, volunteer cycle, and event cycle; created process flow diagram.
- Industry-specific Use Case Analysis: Researched NGO practices with Salesforce (Nonprofit Success Pack).
- AppExchange Exploration: Reviewed existing solutions like NPSP, Volunteer Management apps.

#### Deliverables:

- Requirements\_Day1.docx uploaded to GitHub.
- ProcessFlow\_Day1.png (business process diagram) uploaded to GitHub.

#### Status

- Completed requirement gathering, stakeholder analysis, business process mapping, industry-specific use case analysis, and AppExchange exploration for the NGO Donation & Volunteer Management System. Uploaded requirements document and process flow diagram to GitHub.

# Day 2 – Daily Progress Report

## What I worked on today

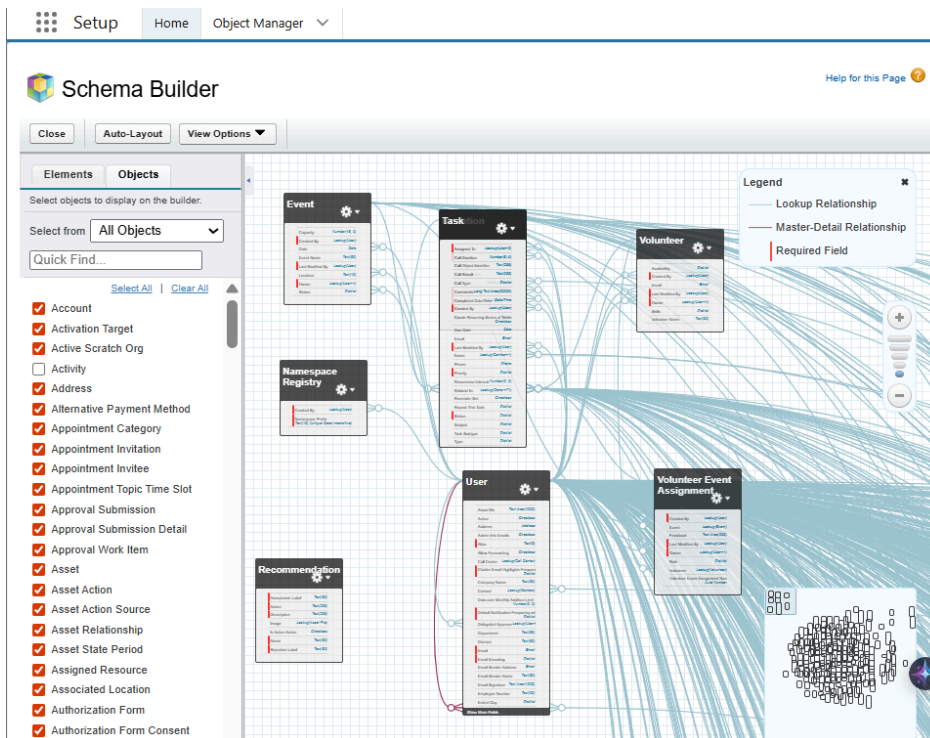
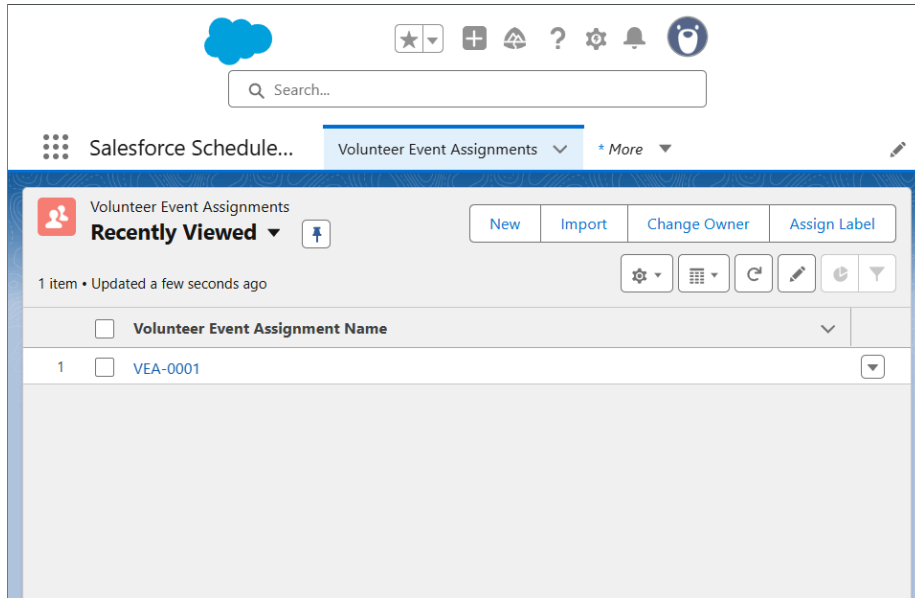
Today, I focused on building the **core data model** for our Salesforce NGO Donation & Volunteer Management System.

- I created **four main custom objects**: Donor, Donation, Volunteer, and Event.
- I added the important fields for each object, such as email, phone, donation amount, date, event capacity, skills, etc.
- To connect donations with donors, I set up a **lookup relationship** so that every donation record is linked to the correct donor.
- For volunteers and events, I designed a **many-to-many relationship** using a junction object called **Volunteer Event Assignment**. This allows multiple volunteers to join the same event and the same volunteer to participate in many events.
- I also set up **tabs** for all custom objects and added them to our **NGO Manager app**, so now they are easily accessible from the App Launcher.
- Finally, I tested the junction object by assigning volunteers to events — it worked as expected, confirming the model is functional.

## What I achieved today

- A **complete data model** with all objects, fields, and relationships.
- A **junction object** that enables flexible volunteer-event assignments.
- A **custom app (NGO Manager)** where all objects are visible and easy to use.

## Screenshots:



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Donation

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Fields & Relationships

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		
Created By	CreatedById	Lookup(User)		
Date	Date__c	Date		
Donation Name	Name	Text(80)		
Donor	Donor__c	Lookup(Donor)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Status	Status__c	Picklist		
Type	Type__c	Picklist		

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Volunteer Event Assignment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

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Scoping Rules

Object Access

Triggers

Flow Triggers

Fields & Relationships

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIE...	INDEXED
Created By	CreatedById	Lookup(User)		
Event	Event__c	Lookup(Event)		
Feedback	Feedback__c	Text Area(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Role	Role__c	Picklist		
Volunteer	Volunteer__c	Lookup(Volunteer)		
Volunteer Event Assignment Name	Name	Auto Number		

# Day 3 – Daily Progress Report

## What I worked on today

Today, I focused on building **automation and workflows** for our Salesforce NGO Donation & Volunteer Management System.

- I created **validation rules** to improve data quality: one to ensure donation amounts are always greater than zero, and another to stop volunteers from being assigned to events that have no available slots.
- I built two **record-triggered flows**:
  - The first flow sends a **thank-you email** automatically whenever a new donation is created.
  - The second flow updates the **available slots on an event** whenever a volunteer assignment is made, ensuring event capacity stays accurate.
- I set up an **approval process** for high-value donations (above 50,000). When such donations are entered, they are marked as pending and an email notification is sent to the approver for review.
- Finally, I created two **email templates**: one for thanking donors and another for notifying managers about high-value donations. These templates ensure consistent communication.

## What I achieved today

- Data validation to prevent wrong entries.
- Smart automation with flows to reduce manual work.
- Approval process for handling big donations in a professional way.
- Reusable email templates for donor and manager communication.

Donation

Akanksha

Related

Details

\* = Required Information

\* Donation Name

Akanksha

Owner

Vaibhav Sakharwade

Amount

⊘ \$0

Donation amount must be greater than 0.

Date

Type

--None--

Status

--None--

Donor

Search Donors...

⊘ We hit a snag.

Review the following fields

- Amount

Cancel

Save

Search Setup

Setup

Home

Object Manager

Quick Find

Setup Home

Salesforce Go

Service Setup Assistant

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

> Users

> Data

> Email

- Apex Exception Email
- Authorized Email Domains
- Classic Email Templates
- Classic Letterheads
- Compliance BCC Email
- DKIM Keys
- Delete Attachments Sent as Links

SETUP

Classic Email Templates

Text Email Template

High-Value Donation Approval

Help for this Page

Preview your email template below.

Email Template Detail

Edit

Delete

Clone

Email Templates from Salesforce	Unfiled Public Classic Email Templates	Available For Use	<input type="checkbox"/>
Email Template Name	High-Value Donation Approval	Last Used Date	
Template Unique Name	High_Value_Donation_Approval	Times Used	
Encoding	Unicode (UTF-8)		
Author	Vaibhav Sakharwade [Change]		
Description			
Created By	Vaibhav Sakharwade, 9/14/2025, 4:18 AM	Modified By	Vaibhav Sakharwade, 9/14/2025, 4:18 AM

Edit

Delete

Clone

Email Template

Send Test and Verify Merge Fields

Subject

Donation Approval Required

Plain Text Preview

A new donation record requires your approval.  
Donor: {!Donation\_\_c.Donor\_\_r.Name}  
Amount: {!Donation\_\_c.Amount\_\_c}  
Status: {!Donation\_\_c.Status\_\_c}  
Please log in to Salesforce to review and approve/reject this donation.

# Day 4 – Daily Progress Report

## What I worked on today

Today, I focused on the **Apex programming phase** of our Salesforce NGO Donation & Volunteer Management project.

- I created an **Apex Trigger** on the Donation object. This trigger automatically updates the status of donations:
  - Donations above 50,000 are marked as **Pending Approval**.
  - All others are set to **Approved**.
- I developed a reusable **Apex Utility Class (DonationUtils)**. This class calculates the **total amount donated by a specific donor**, which will be useful for reporting and analytics.
- I wrote an **Apex Test Class** to validate the utility method and ensure that the code meets Salesforce's requirement of at least 75% coverage. The test created sample donors and donations, verified the calculation, and passed successfully.
- I executed the test in Developer Console, checked the **debug logs**, and confirmed correct results and 100% coverage for the utility class.

## What I achieved today

- Automated status assignment for donations using Apex Trigger.
- Created a utility method to calculate total donations per donor.
- Verified correctness with Apex test class and achieved full code coverage.
- Successfully tested the functionality with sample data.

Developer Console - Google Chrome

orgfarm-326d0a4888-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help

DonationTrigger.apex

Code Coverage: None API Version: 64

```
1 trigger DonationTrigger on Donation_c (before insert) {
2   for (Donation_c d : Trigger.new) {
3     // ensure Amount API name matches your org
4     if (d.Amount__c != null && d.Amount__c > 50000) {
5       d.Status__c = 'Pending Approval';
6     } else {
7       d.Status__c = 'Approved';
8     }
9   }
10 }
11
```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size
Vaibhav Sakharwade	Unknown	common.apisSoapDirectSoap	9/15/2025, 5:40:08 PM	Success	Unread	532 bytes
Vaibhav Sakharwade	Browser	/aura	9/15/2025, 5:40:08 PM	Success	Unread	4.46 KB
Vaibhav Sakharwade	Browser	/aura	9/15/2025, 5:39:17 PM	Success	Unread	1.43 KB
Vaibhav Sakharwade	Browser	/flow/Donation_ThankYou_Email/301g...	9/15/2025, 5:39:14 PM	Success	Unread	321 bytes
Vaibhav Sakharwade	Browser	/aura	9/15/2025, 5:39:12 PM	Success	Unread	321 bytes
Vaibhav Sakharwade	Browser	/aura	9/15/2025, 5:38:33 PM	Success	Unread	1.43 KB
Vaibhav Sakharwade	Browser	/flow/Donation_ThankYou_Email/301g...	9/15/2025, 5:38:29 PM	Success	Unread	321 bytes
Vaibhav Sakharwade	Browser	/aura	9/15/2025, 5:38:17 PM	Success	Unread	1.43 KB
Vaibhav Sakharwade	Browser	/flow/Donation_ThankYou_Email/301g...	9/15/2025, 5:38:14 PM	Success	Unread	320 bytes
Vaibhav Sakharwade	Browser	/aura	9/15/2025, 5:36:55 PM	Success	Unread	320 bytes
Vaibhav Sakharwade	Browser	/aura	9/15/2025, 5:35:44 PM	Success	Unread	1.43 KB
Vaibhav Sakharwade	Browser	/flow/Donation_ThankYou_Email/301g...	9/15/2025, 5:35:42 PM	Success	Unread	320 bytes
Vaibhav Sakharwade	Browser	/aura	9/15/2025, 5:35:38 PM	Success	Unread	1.44 KB
Vaibhav Sakharwade	Browser	/flow/Donation_ThankYou_Email/301g...	9/15/2025, 5:35:34 PM	Success	Unread	320 bytes
Vaibhav Sakharwade	Browser	/aura	9/15/2025, 5:34:20 PM	Success	Unread	321 bytes

Filter Click here to filter the log list

orgfarm-326d0a4888-dev-ed.develop.lightning.force.com/lightning/r/Donation\_c/a01gK00000...

OCI PS BAGGAGE RESEARCH AI

Search...

NGO Manager Volunteer Event Assignments Donors Donations Events Volunteers

Donation om

Donation "om" was created.

New Contact Edit New Opportunity

Related Details

Donation Name	om	Owner	Vaibhav Sakharwade
Amount	\$5,000		
Date	9/12/2025		
Type	One-time		
Status	Approved		
Donor	Om Urkude		
Created By	Vaibhav Sakharwade	Last Modified By	Vaibhav Sakharwade
	9/15/2025, 5:20 AM		9/15/2025, 5:20 AM

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.



# Day 5 – Daily Progress Report

## What I worked on today

Today, I worked on improving the **user interface (UI)** of our Salesforce NGO Donation & Volunteer Management project using **Lightning App Builder**.

- I customised the **record pages** for Donor, Donation, Volunteer, and Event objects. Each record page now highlights the most important details at the top, includes related lists for quick navigation, and displays charts where relevant.
- I created a **custom Home Page** for the NGO Manager app. The Home Page now includes:
  - A **Report Chart** showing donation insights (e.g., donations by donor type).
  - **Recent Records** components for quick access to Donations and Events.
  - A **List View** for Pending Approvals to help managers review high-value donations faster.
  - The **Assistant Component** for reminders and tasks.
- I updated the **NGO Manager app navigation bar** by adding the **Home tab**, ensuring users have a central dashboard when they open the app.

## What I achieved today

- Improved user experience with intuitive, clean record pages.
- Set up a **central Home dashboard** with charts, lists, and tasks.
- Made the NGO Manager app more **professional and user-friendly**.

NGO Manager

Volunteer Event Assignments

Donors

Donations

Events

Volunteers

Event

Indipendence Day

New Contact

Edit

New Opportunity

Related

Details

Event Name

Indipendence Day

Owner

Vaibhav Sakharwade

Date

8/15/2025

Location

Nagpur

Capacity

12

Status

Completed

Available Slots

10

Created By

Vaibhav Sakharwade

9/16/2025, 5:35 AM

Events

All

New

Import

Change Owner

Printable View

Assign Labels

2 items • Sorted by Event Name • Filtered by All events • Updated a few seconds ago

Event Name ↑

1

Indipendence Day

2

Technology

Activity

Filters: All time • All activities • All types

Refresh

Expand All

View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Lightning App Builder

Pages

Donation Record Page

Help

Desktop

Shrink To View

Analyze

Activation...

Save

Components

Fields

q

Standard (4)

Quip Associated Documents

Quip Document

Quip Notifications

Related List Quick Links

Custom (0)

Custom - Managed (0)

Page > Path

Format

Linear

Hide path update button

Path content is configured in Setup.

See How It Works

Configure the Path

Set Up Path

Set Component Visibility

Filters

1

Record > Amount Greater Than 1000

Add Filter

Get more on the AppExchange

NGO Manager

Home Page

Donations

Donors

Events

Volunteer Event Assignments

Home

More



# Day 6 – Daily Progress Report

## What I worked on today

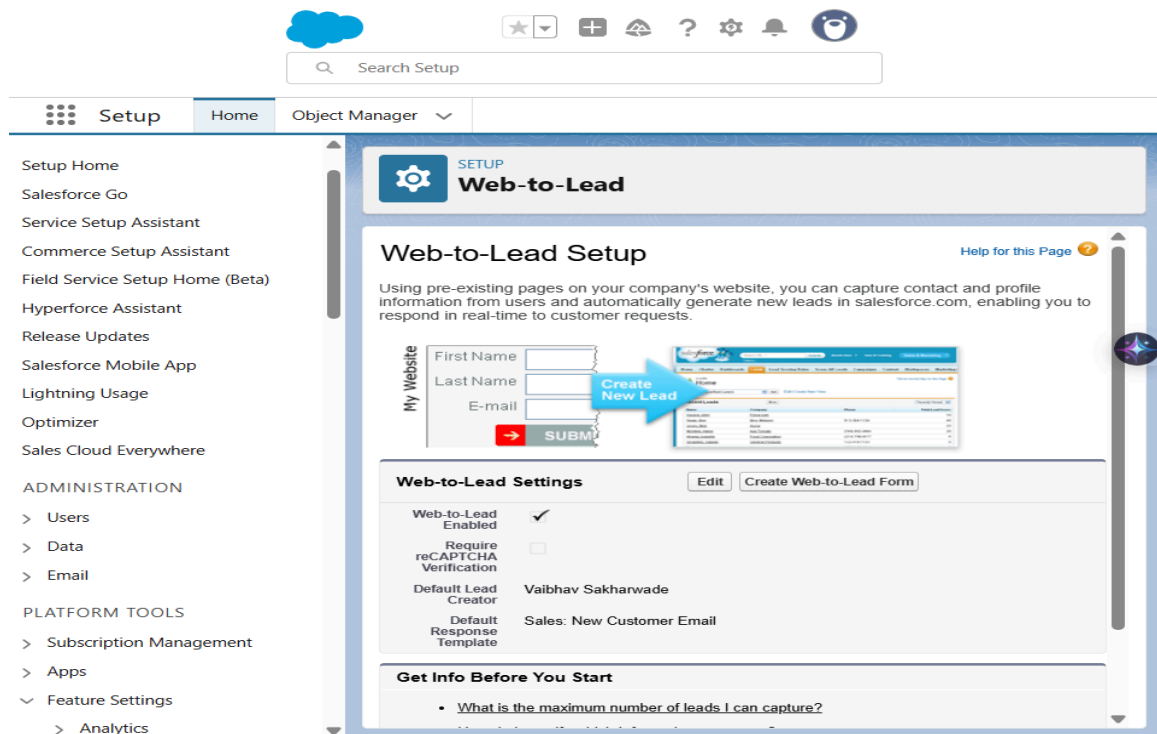
Today was all about building the **integration and external access** part of our Salesforce NGO project. I enabled **Web-to-Lead** and created an external HTML form where donors can enter their details and donation information. When the form is submitted, Salesforce automatically creates a Lead.

To make this meaningful for our NGO use case, I built a **Record-Triggered Flow** that converts these Leads into proper **Donor and Donation records** inside the NGO Manager app. I also updated the Lead layout to include our custom donation fields, which allowed us to test the flow successfully.

## What I achieved today

- Enabled **Web-to-Lead** and generated a working HTML donation form.
- Added **Donation Amount** and **Donation Type** fields to the Lead page layout.
- Built a **Record-Triggered Flow** that auto-creates Donor + Donation records from new Leads.
- Successfully tested the full flow: HTML form → Lead → Donor + Donation.

## Screenshots



Flow Builder

Lead\_to\_Donation\_AutoCreate - V2

Debug Run: Lead\_to\_Donation\_AutoCreate 9/17/2025, 6:04 PM

Not Triggered

↩️ ↻️ ⌛

Edit Flow

Convert to Test

Debug Again

Save As New Version

Save

Deactivate

Record-Triggered Flow

Start

Run Immediately

Find\_Donor\_By\_Email

Get Records

DonorExists?

Decision

Found

Default Outcome

Create\_Donor

Create Records

Create Dummy Donation

Create Records

End

Debug Details

Expand All

Basic Debug Log

Search this list...

How the Interview Started

This flow was triggered as if the **lead** record was **updated**.

Details

Start Condition Requirements

The triggering record didn't meet the start conditions.

Details

How the Interview Finished

Details

The flow interview ran for 0.80 seconds and finished on September 17, 2025 at 6:04 PM.

NGO Manager

Home Page

Donations

Donors

Events

Volunteer Event Assignments

OM Urkude | Lead

More

Lead

OM Urkude

+ Follow

New Case

New Note

Submit for Approval

Title

Company

Phone (2)

Email

vaibhavsakharwade75@gamil.com

Open - Not Contacted

Working - Contacted

Closed - Not Converted

Converted

Mark Status as Complete

Activity

Details

Chatter

New Task

Log a Call

New Event

Email

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

September • 2025

This Month

Email: Welcome to the GenWatt Community

You sent an email

Today

No more past activities to load.

Related

We found no potential duplicates of this Lead.

Campaign History (0)

Flow Builder | Lead\_to\_Donation\_AutoCreate - V5 | Debug Run: Lead\_to\_Donation\_AutoCreate 9/17/2025, 6:34 PM | Completed

Buttons: Edit Flow, Convert to Test, Debug Again, Save As New Version, Save, Activate

**Flow Diagram:**

```

graph TD
    Start([Record-Triggered Flow Start]) --> RunImmediately[Run Immediately]
    RunImmediately --> FindDonor[Find_Donor_By_Email Get Records]
    FindDonor --> DonorExists{DonorExists? Decision}
    DonorExists -- Found --> CreateDonor[Create_Donor Create Records]
    DonorExists -- Default Outcome --> CreateDonor
    CreateDonor --> CreateDonation[Create_Donation Create Records]
    CreateDonation --> End([End])
  
```

**Debug Details**

Collapse All | Basic Debug Log

Search this list...

**Create Records: Create\_Donation**

One or more **Donation\_\_c** records are ready to be created.

**Details**

Create one Donation\_\_c record where  
 Amount\_\_c = ({Record.Donation\_Amount\_\_c} (4,500)  
 Date\_\_c = ({Flow.CurrentDate} (September 17, 2025)  
 Donor\_\_c = ({varDonorId} (a00gK00000KkUE5QAN)  
 Status\_\_c = Pending  
 Type\_\_c = ({Record.Donation\_Type\_\_c} (One-time)  
 Result  
 A record is ready to be created when the next screen, pause, or local action is executed or when the interview finishes.  
 a01gK00000KmU14QAF

**Rollback**

**Details**

Because the flow ran in rollback mode, any changes to add, delete, or modify records were rolled back.

**How the Interview Finished**

**Details**

The flow interview ran for 0.93 seconds and finished on September 17, 2025 at 6:34 PM.

NGO Manager | Home Page | Donations | Donors | Events | Volunteer Event Assignments | Lead\_to\_Donation\_AutoCr... | More

Search...

**Donations**

All | New | Import | Change Owner | Printable View | Assign Label

6 items • Sorted by Donation Name • Updated a few seconds ago

	Donation Name ↑	
1	<input type="checkbox"/> a01gK00000Km6EC	
2	<input type="checkbox"/> a01gK00000Kmdq1	
3	<input type="checkbox"/> a01gK00000KmE6t	
4	<input type="checkbox"/> Akanksha	
5	<input type="checkbox"/> om	
6	<input type="checkbox"/> Vaibhav	

NGO Manager | Home Page | Donations | Donors | Events | Volunteer Event Assignments | Lead\_to\_Donation\_AutoCr... | More

Search...

**Donors**

All | New | Import | Change Owner | Printable View | Assign Label

5 items • Sorted by Donor Name • Updated a few seconds ago

	Donor Name ↑	
1	<input type="checkbox"/> Dautpure	
2	<input type="checkbox"/> Dautpure	
3	<input type="checkbox"/> Dautpure	
4	<input type="checkbox"/> Om Urkude	
5	<input type="checkbox"/> Vaibhav Sakharwade	

