

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

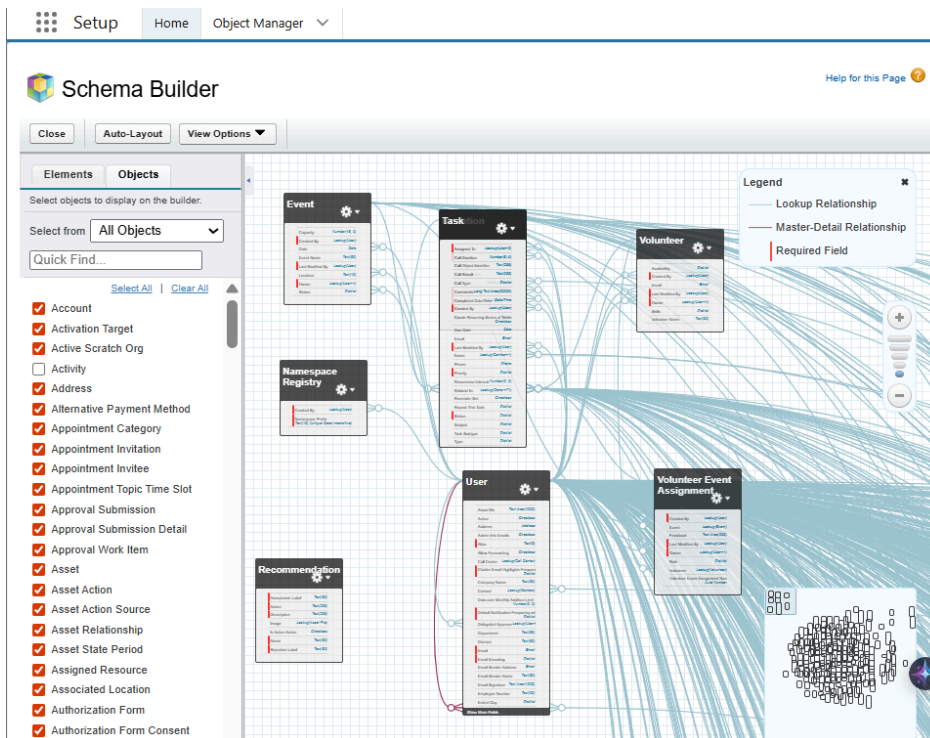
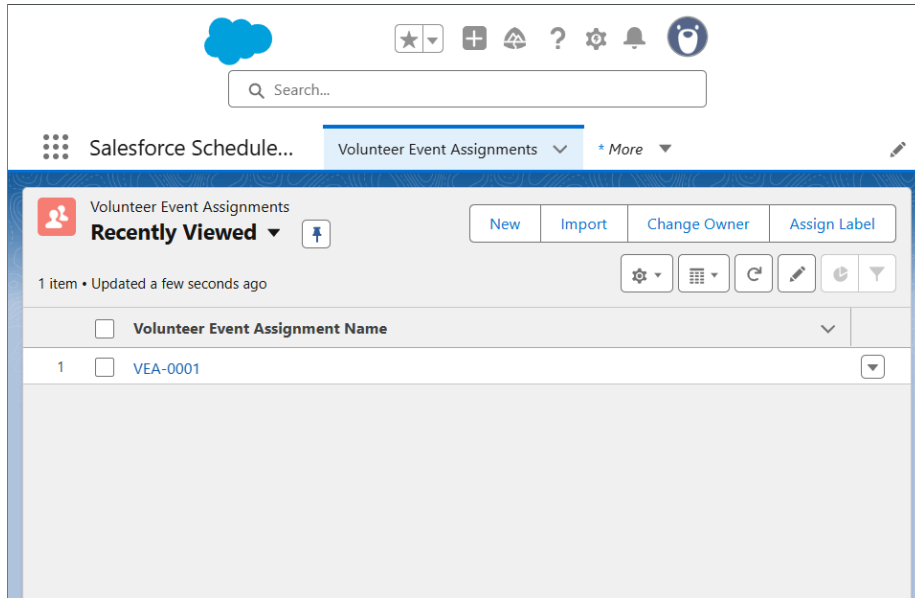
Today, I focused on building the **core data model** for our Salesforce NGO Donation & Volunteer Management System.

- 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

9 Items, Sorted by Field Label

NewDeleted FieldsField DependenciesSet History Tracking

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

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Fields & Relationships

8 Items, Sorted by Field Label

NewDeleted FieldsField DependenciesSet History Tracking

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

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.

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

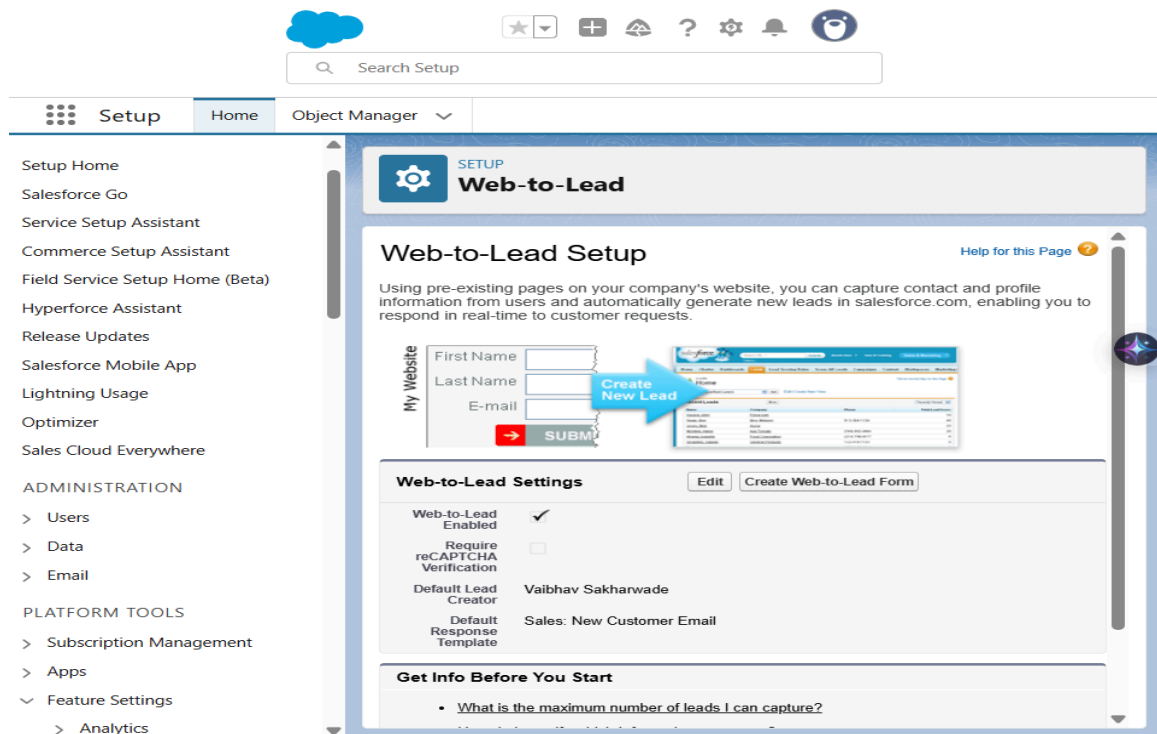
Today was all about building the **integration and external access** part of our Salesforce NGO project. I enabled **Web-to-Lead** and created an external HTML form where donors can enter their details and donation information. When the form is submitted, Salesforce automatically creates a Lead.

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

↩

↺

⌂

✎ Edit Flow

↔ Convert to Test

🐞 Debug Again

💾 Save As New Version

💾 Save

⚡ Activate

Record-Triggered Flow

Start

Run Immediately

Find_Donor_By_Email

Get Records

DonorExists?

Decision

Found

Default Outcome

Create_Donor

Create Records

Create_Donation

Create Records

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.

a01gK00000KmU4QAF

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.

👤

🔍 Search...

★

+

🔄

?

⚙

🔔

👤

NGO Manager

Home Page

Donations

Donors

Events

Volunteer Event Assignments

Lead_to_Donation_AutoCr...

×

More

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	⌵

👤

🔍 Search...

★

+

🔄

?

⚙

🔔

👤

NGO Manager

Home Page

Donations

Donors

Events

Volunteer Event Assignments

Lead_to_Donation_AutoCr...

×

More

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	⌵

Day 7 — Daily Progress Report

Goal of the Day

To populate the Salesforce NGO App with **sample data** (Donors, Volunteers, Events, Donations, and Volunteer-Event Assignments) so the system can demonstrate full end-to-end workflows in later phases.

Tasks Completed

1. Donors

- Created **25 Donor records** (mix of *Individual* and *Corporate* types).
- Fields filled: *Name, Email, Phone, Donor Type*.
- Verified: Donor records visible under **All Donors** list view.

2. Volunteers

- Created **25 Volunteer records**.
- Fields filled: *Name, Email, Skills, Availability*.
- Skills/Availability values aligned with picklist definitions.
- Verified: Volunteer records visible under **All Volunteers** list view.

3. Events

- Created multiple **Event records** with details:
 - *Name, Date, Location, Capacity, Available Slots, Status*.
- Verified: Events visible under **All Events** list view.

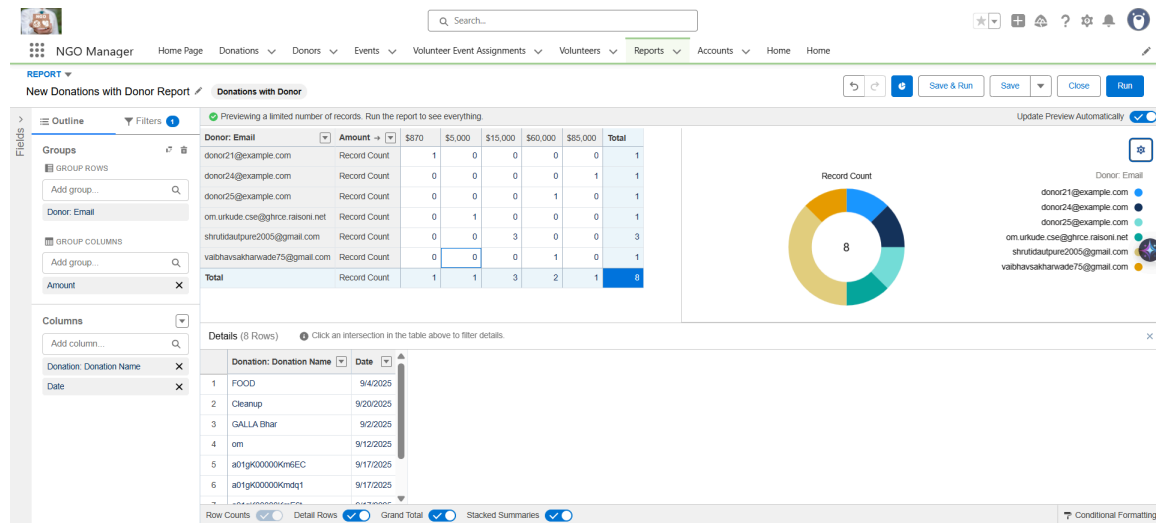
4. Donations

- Created sample **Donations linked to Donors**.
- Fields filled: *Amount, Date, Type (One-time/Recurring), Status (Pending/Approved)*.
- Verified: Donations appear in **Donations tab** and under **Donor related list**.

5. Volunteer Event Assignments (Junction Object)

- Configured **Volunteer** ⇌ **Event** assignments.
- Edited **Event record page** to show “Volunteer Event Assignments” related list.
- Added roles (Helper, Coordinator, Photographer).
- Verified: Events show linked Volunteers, Volunteers show linked Events.

Screenshots



Challenges Faced

- Errors with picklist values (Skills__c, Availability__c) — resolved by ensuring exact picklist values in Salesforce.
- Field name mismatches (e.g., Event_Name__c vs Name) — resolved by using correct API names.
- Initial Import Wizard issues → switched to **manual entry** for clean dataset creation.

Outcome

By the end of Day 7, the NGO Salesforce system has a **connected dataset of 25 Donors, 25 Volunteers, multiple Events, Donations, and Volunteer Assignments**. This data is now ready for **Day 8: Reports & Dashboards**

Day 8 - Daily Progress Report

Goal of the Day

Build **Reports & Dashboards** to provide NGO managers with real-time insights into **donors, donations, volunteers, and events**.

Tasks Completed

1. Created Report & Dashboard Folders

- Report folder: **NGO Reports**
- Dashboard folder: **NGO Dashboards**
Keeps all analytics resources organized.

2. Reports Built

- **Donations by Donor** → Groups donations by Donor, shows total amount.
- **High-Value Donations** → Filters approved donations ≥ 5000 , grouped by Donor Type.
- **Volunteers by Event** → Shows volunteers assigned per event with their roles.
- **Event Capacity Utilization** → Displays event capacity vs available slots with formula field for “Filled Slots”.

3. Dashboard Created

NGO Overview Dashboard with 4 components:

- Bar Chart → Top Donors (from Donations by Donor report).
- Donut Chart → High-Value Donations split by Donor Type.
- Stacked Bar → Volunteers by Event and Role.
- Gauge Chart → Event Capacity Utilization (slots filled).

Screenshots

NGO Manager Home Page Donations Donors Events Reports More

REPORT New Donations Report Donations

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Status	Donation: Donation Name	Type
Approved (4)	om	One-time
	a01gK00000Km6EC	One-time
	a01gK00000KmE6t	One-time
	a01gK00000Kmdq1	One-time
Subtotal		
Pending Approval (3)	Vaibhav	One-time
	Cleanup	One-time
	GALLA Bhar	One-time
Subtotal		
Total (7)		

NGO Manager Home Page Donations Donors Events Reports More

REPORT New Donations Report Donations

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Status	Amount	Donation: Donation Name	Type
Approved (4)	\$5,000 (1)	om	One-time
Subtotal			
	\$15,000 (3)	a01gK00000Km6EC	One-time
		a01gK00000KmE6t	One-time
		a01gK00000Kmdq1	One-time
Subtotal			
Pending Approval (3)	\$60,000 (2)	Vaibhav	One-time
		GALLA Bhar	One-time
Subtotal			
	\$85,000 (1)	Cleanup	One-time
Subtotal			
Total (7)			

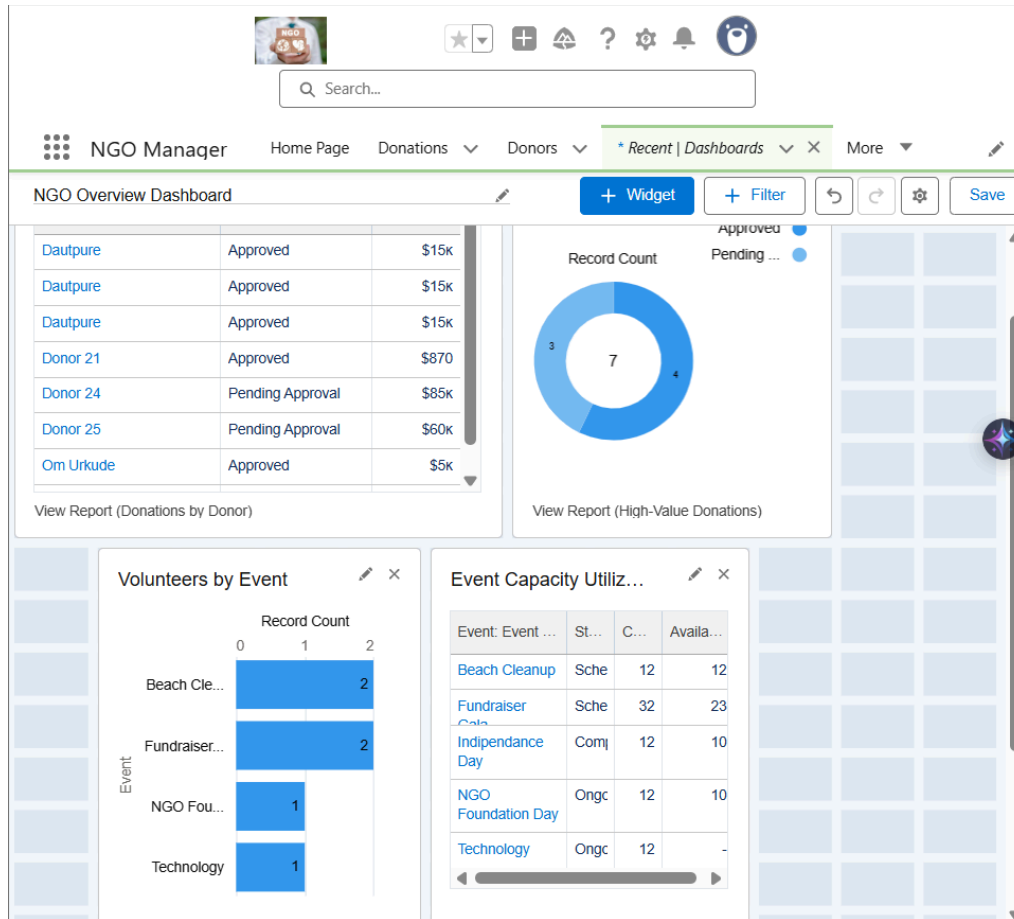
Row Counts Detail Rows Subtotals Grand Total

NGO Manager Home Page Donations Donors Events Reports More

REPORT New Events Report Events

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Event: Event Name	Status	Capacity	Available Slots
1 Technology	Ongoing	12	-
2 Indipendence Day	Completed	12	10
3 Fundraiser Gala	Scheduled	32	23
4 NGO Foundation Day	Ongoing	12	10
5 Beach Cleanup	Scheduled	12	12
6		80	55



Challenges Faced

- Needed to adjust **picklist values and formulas** while building reports.
- Ensured correct report types (e.g., “Donations with Donors”, “Volunteer Event Assignments with Volunteers”).

Day 9 — Security Review & Testing

Activities Completed

1. Profiles & Permission Sets

- Created 3 Profiles: **NGO Admin**, **Donor Manager**, **Volunteer Manager**.
- Created test users and logged in as each:
 - **Donor Manager** → could create/view Donors & Donations.
 - **Volunteer Manager** → could create/view Volunteers & Volunteer Assignments.
 - **NGO Admin** → full access.
- Fixed missing field access (Donation Amount, Volunteer Skills) by assigning extra **Permission Sets**.

2. Data Visibility (OWD & Sharing Rules)

- Set **Organization-Wide Defaults**:
 - Donor, Volunteer, Donation, Event, Assignment → **Private**.
- Configured **Sharing Rules**:
 - Donors & Donations shared with **Donor Manager role**.
 - Volunteers & Assignments shared with **Volunteer Manager role**.

3. Validation & Automation Testing

- Verified validation rules:
 - Donations cannot have negative amounts.

- Event slots cannot exceed capacity.
- Tested Flows & Approvals:
 - High-value donation (> ₹50,000) routed for approval.
 - On approval → Thank-You email sent.
 - Event Signup Flow → successfully created Volunteer Assignment.

4. Reports & Dashboards Validation

- Ran **Donations by Donor** → totals matched imported data.
- Refreshed **NGO Overview Dashboard** → updated charts reflected new test donations.

5. Cleanup & Polish

- Removed test/junk donor records.
- Updated tab & field labels for better readability.
- Checked app branding & logo in App Manager.
- Admin, Donor Manager, Volunteer Manager).

Outcome

The **NGO App** is now **secure, tested, and demo-ready**.

All major flows, automation, and approval processes are validated.

We can confidently move to **Day 10 (Final Presentation & Demo)**.

Setup

Home

Object Manager

Search Setup

★

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⚙

🔔

Sales Cloud Everywhere

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management

> Apps

> Feature Settings

> Slack

> Data Cloud

> Heroku

> MuleSoft

> Einstein

SETUP

Users

All Users

Help for this Page

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users

Edit

Create New View

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

New User

Reset Password(s)

Add Multiple Users

<input type="checkbox"/>	Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty.00d9k000007aitduae-iv0fm2conjn@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	Edit	EPIC_OrgFarm	QEPIC	epic.d8bf315b4e3@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/>	Edit	Sakharwade, Vaibhav	vai	vaibhav1.sakharwade102@agentforce.com		✓	System Administrator
<input type="checkbox"/>	Edit	Sakharwade, Vaibhav	vaibhav+	vaibhavsakharwade75@gmail.com	Donor Manager	✓	Standard User
<input type="checkbox"/>	Edit	User_Integration	integ	integration@00d9k000007aitduae.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User_Security	sec	insightssecurity@00d9k000007aitduae.com		✓	Analytics Cloud Security User
<input type="checkbox"/>	Edit	user_Test	testuser	testuser7771@vrs.com		✓	Donor Manager Profile

New User

Reset Password(s)

Add Multiple Users

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All