**Problem Statement Document**

## **Project Title:**

**Salesforce NGO Donation & Volunteer Management System**

## **1. Problem Statement:**

Non-Governmental Organisations (NGOs) often face challenges in managing donations, volunteers, and campaign impact tracking. Many NGOs rely on manual spreadsheets or basic tools, which results in:

- Difficulty maintaining donor history and recurring donations.  
 - Inefficient volunteer assignment and progress tracking.  
 - Lack of real-time reports on donation drives or events.  
 - Poor transparency in financial and volunteer records.  
  
 This project proposes to build a Salesforce-based Donation & Volunteer Management System that provides a centralized platform for handling donations, managing volunteers, automating processes, and generating actionable insights. The system will enhance efficiency, transparency, and engagement between NGOs, donors, and volunteers.

## **2. Objectives:**

· 1. Centralize donor and volunteer records in Salesforce.

· 2. Automate donation acknowledgments and volunteer assignments.

· 3. Provide real-time dashboards for campaign performance.

· 4. Enable integrations with external services (email, forms).

· 5. Improve NGO transparency through secure reporting.

### **Requirement Gathering**

For the NGO Donation & Volunteer Management System, the requirements include:

* Recording donor details and tracking donation history.
* Managing volunteer registrations, skills, and event assignments.
* Automating donation acknowledgments and reminders.
* Providing real-time dashboards for campaign progress and donations.
* Enabling secure access for NGO staff and integration with external communication tools.

**Stakeholder Analysis**

The main stakeholders for this project are:

* **NGO Administrators:** Manage donations, volunteers, and campaigns.
* **Donors:** Provide financial contributions and expect transparency on fund utilization.
* **Volunteers:** Participate in NGO activities and require proper event/task assignments.
* **Technical Team (Developers/Admins):** Build and maintain the Salesforce solution.
* **Reviewers/Examiners (Academic Context):** Evaluate the project design, implementation, and impact.

### **Business Process Mapping**

Typical NGO workflows include:

1. **Donor Cycle:** Donor registers → Makes donation → Receives acknowledgment → Donation record updated.
2. **Volunteer Cycle:** Volunteer registers → Skills matched → Assigned to event → Completion tracked.
3. **Event/Campaign Cycle:** NGO launches campaign → Donors & volunteers engaged → Impact reports generated.

Mapping these processes highlights inefficiencies in manual systems and shows how Salesforce automation can streamline them.

**Industry-specific Use Case Analysis**

Similar solutions in the nonprofit sector reveal common patterns:

* Use of **donation tracking systems** to improve transparency.
* Volunteer management modules integrated with events and campaigns.
* Reporting dashboards to measure **impact and performance**.
* Automated emails and workflows for donor engagement.  
   This analysis confirms the relevance of building a Salesforce-based solution tailored for NGOs.

### **AppExchange Exploration**

Salesforce **AppExchange** has nonprofit-related apps like **Nonprofit Success Pack (NPSP)** and **Volunteer Management solutions**. By studying these, we:

* Identify best practices used by professional NGO systems.
* Understand existing limitations and areas for improvement.
* Ensure our project aligns with real-world standards while remaining unique.

## **3. Scope of the Project:**

· Custom Objects: Donors, Donations, Volunteers, Events.

· Automation: Flows, Validation Rules, and Approval Processes to reduce manual work.

· Apex Development: Triggers & Classes for advanced logic (e.g., updating donor totals).

· User Interface: Lightning Pages and Quick Actions for intuitive use.

· Integration: Email-to-Case or form integration for donor/volunteer engagement.

· Data Management: Secure storage of donor/volunteer/event data.

· Reporting & Dashboards: Visual insights into donations and volunteer activities.

## **4. Expected Outcomes:**

· A centralized Salesforce application for NGO operations.

· Automated workflows reducing manual errors and delays.

· Real-time reports and dashboards for NGO administrators.

· Improved donor and volunteer engagement through structured processes.

· A scalable and extendable solution adaptable for future NGO needs.

## **5. Conclusion:**

The Salesforce NGO Donation & Volunteer Management System will provide a modern, scalable, and practical solution to one of the most common challenges faced by NGOs today. By combining Salesforce’s low-code capabilities with automation, reporting, and integration features, this project ensures both academic completeness and real-world applicability.