

Donation Tracking System in Salesforce

Phase 1 – Requirement Gathering & Topic Collection

Project Title

Donation Tracking System in Salesforce

Objective

To design and implement a Salesforce-based portal that enables donors to contribute to various causes (orphanages, old age homes, poor people, blood donation, clothes/items) while providing NGO staff with tools to manage, track, and report on donations.

Stakeholders (Who will use the system)

- a) Donors (External Users via Portal) – Individuals who want to contribute. They need ability to donate money securely, pledge clothes/items, register as blood donor, and track donation progress.
- b) NGO Staff (Internal Users in Salesforce) – Organization employees/volunteers. They need to manage causes, update donation statuses, manage donor info, and generate reports.
- c) System Admin – Salesforce admin who sets up objects, fields, and automations, ensuring data quality and security.

Scope of the System

- a) Monetary Donations (Funds) – For causes like Orphanages, Old Age Homes, Helping Poor. Secure payment via online gateway. Status updates: Pledged → Processing → Received → Receipt Sent.
- b) Blood Donations – Donors register in portal (name, blood group, city, availability). NGO contacts them when needed. Status updates: Registered → Contacted → Donated.
- c) In-Kind Donations (Clothes, Items, Essentials) – Donors pledge items via portal. NGO arranges pickup or donor drops at center. Status updates: Pledged → Collected → Distributed.

Functional Requirements

Donor Side (Portal): Register/Login, donate money, pledge items, register for blood donation, make payments, view & track donations, download receipts.

NGO Staff Side (Salesforce): Manage campaigns, donors, donations, notifications, generate reports, dashboards, update statuses.

Non-Functional Requirements

- Usability: Portal must be simple for public users.
- Security: Donor details & payments must be safe.
- Scalability: Handle multiple causes & donors.
- Automation: Minimize manual work with flows & emails.

- Transparency: Donors see how donations are used.

Assumptions & Constraints

- Payment gateway integration for money donations.
- Blood & clothes donations tracked in Salesforce but happen offline.
- Donors require only portal login.
- NGO staff will update statuses for physical donations.

Deliverables of Phase 1

- Final list of donation types supported (Money, Blood, Clothes).
- Clear user roles (Donors, NGO Staff, Admin).
- Defined features & scope.
- Documented requirements for Phase 2 setup.