Salesforce Implementation – Donation Tracking System for Non-Profit Organizations

# 1. Main Moto of the Project

To implement a powerful Donation Tracking System in Salesforce CRM that helps Non-Profit Organizations manage donations, track donors, run campaigns, automate donation processing, and generate insightful reports—while maintaining full transparency and improving operational efficiency.

# 2. Introduction

Non-Profit Organizations (NPOs) handle a large number of donations and interact with multiple donors every day. Managing these activities manually is error-prone and inefficient. By leveraging Salesforce CRM, this project provides a scalable solution where donation records, donor profiles, campaign data, and reports are managed in a centralized platform. Salesforce’s automation tools (Flow, Process Builder), Standard and Custom Objects, Reports, and Dashboards will greatly enhance NPOs' donation management capabilities.

# 3. Abstract

This project implements a Donation Tracking System in Salesforce CRM by creating Custom Objects such as Donor, Donation, Campaign, and integrating them into the Salesforce ecosystem. The system automates donor communication (via Email Templates and Automation), tracks donations in real time, generates actionable reports and dashboards, and provides a 360-degree view of all donor interactions. It helps NPOs manage donation campaigns, maintain donor relationships, and generate receipts automatically while ensuring data security and compliance.

# 4. Objectives

* ✔ Create Custom Objects: Donor, Donation, Campaign
* ✔ Track donation amounts, purpose, dates, and status
* ✔ Automate email acknowledgments and tax receipts using Salesforce Email Templates & Process Builder
* ✔ Provide real-time dashboards for donation performance and trends
* ✔ Enable reports for campaign performance, donor activity, and pending donations
* ✔ Manage donor lifecycle from first contact to repeat donations
* ✔ Support integrations with Payment Gateways (via APIs)
* ✔ Improve data accuracy and reduce manual errors
* ✔ Enable permission sets for secure access control

# 5. Phases of the Project (1 to 10)

## Phase 1 – Requirement Gathering

Meet with NPO stakeholders to collect business requirements and define key entities: Donors, Donations, Campaigns.

## Phase 2 – Salesforce Org Setup

Set up a Salesforce Developer Org or Sandbox, configure standard objects and security settings, Profiles, Roles, and Permission Sets.

## Phase 3 – Custom Object & Field Creation

Create Donor, Donation, and Campaign custom objects with relevant fields.

## Phase 4 – Automation (Flows & Process Builder)

Automate donor acknowledgments, tax receipt generation, campaign alerts, and validation rules.

## Phase 5 – Integration Setup

Integrate with Payment Gateways using APIs for automated online donations.

## Phase 6 – Reports & Dashboards

Create custom reports and dashboards for donation trends and campaign performance.

## Phase 7 – Security & Data Access Control

Implement Role Hierarchy, Permission Sets, and Field-Level Security.

## Phase 8 – User Training & Documentation

Prepare User Guides and train admins and volunteers on system usage.

## Phase 9 – Testing & UAT (User Acceptance Testing)

Test automations, integrations, tax receipt generation, and report accuracy.

## Phase 10 – Deployment & Maintenance

Deploy to Production Org, monitor logs, backups, and provide ongoing support.

# 6. Real-Time Use Cases

* ✔ An NGO tracks flood relief donations in real time, sending automated receipts and showing progress dashboards.
* ✔ Corporate donors tracked for relationship management and segmented reporting.
* ✔ Campaigns monitored in real time to adjust strategies based on dashboard insights.

# 7. Future Scope (Feedback & Enhancement)

* ✔ Add Pardot Integration for Donor Engagement Campaigns
* ✔ Create a Mobile App for easy field donation tracking
* ✔ Build Einstein Analytics for advanced predictive donation trends
* ✔ Automate recurring donation management
* ✔ Integrate SMS alerts using Salesforce Messaging APIs

# 8. Conclusion

Using Salesforce CRM for a Donation Tracking System empowers Non-Profit Organizations to manage their donors and campaigns effectively. It automates key processes, enables real-time insights, and enhances donor relationships—ultimately increasing the efficiency of social impact work.