**Phase-2: Org Setup & Configuration**

This phase focuses on setting up the Salesforce environment to support NGO operations, donation tracking, and impact management. It ensures proper configurations, security, and user access to align with organizational processes.

**1. Salesforce Editions**

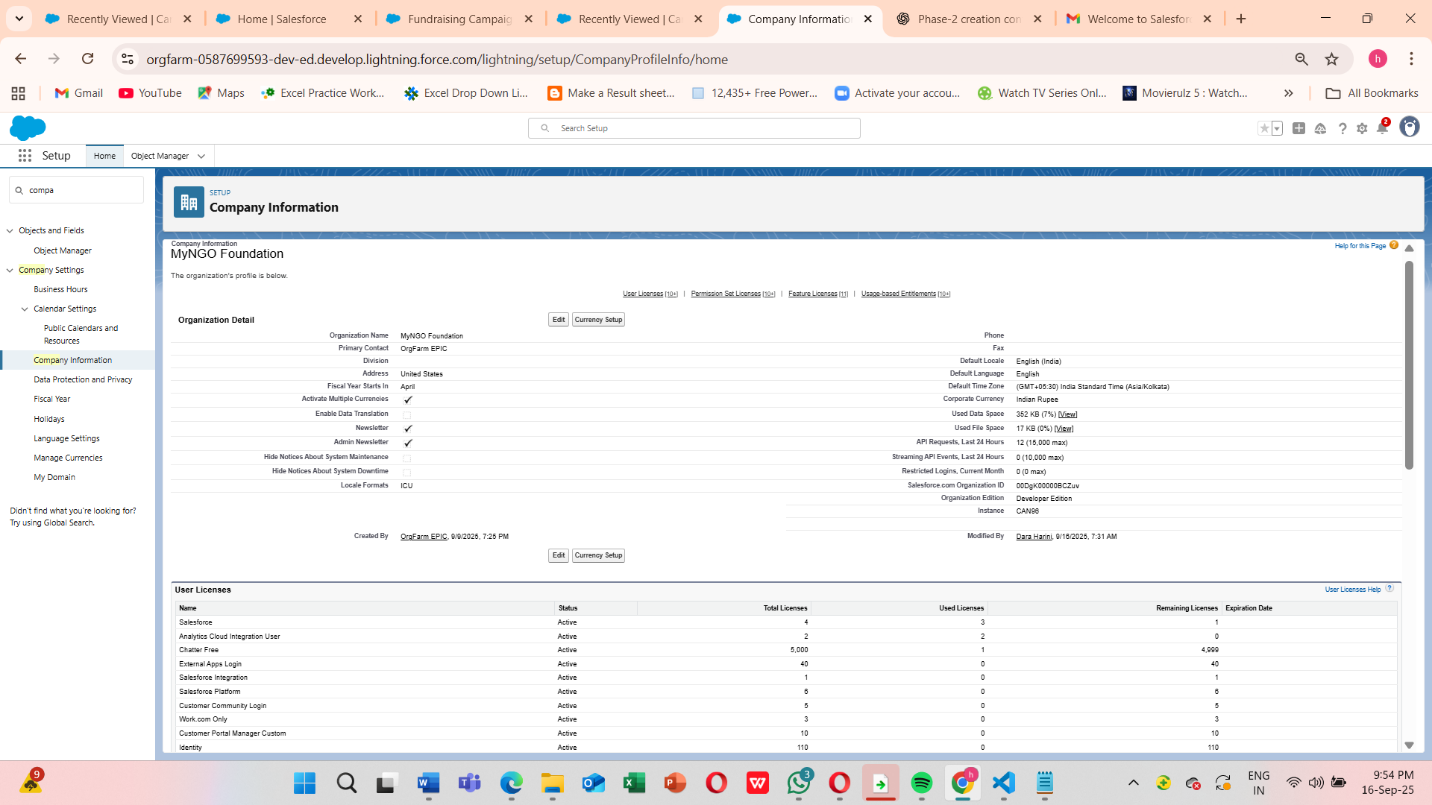
Salesforce offers multiple editions, each with varying features. Choosing the right edition is crucial for NGO operations.

**Step:**

1. Navigate to **Setup → Company Settings → Company Information**.
2. Check the **Salesforce Edition** field.

**Recommendation for NGO Project:**

* **Enterprise edition** provides custom objects, workflows, API access, and automation rules, which are crucial for an AI-powered system that tracks donations and impact metrics.
* **Nonprofit Success Pack (NPSP)** which Built on Enterprise Edition; ideal for NGOs.

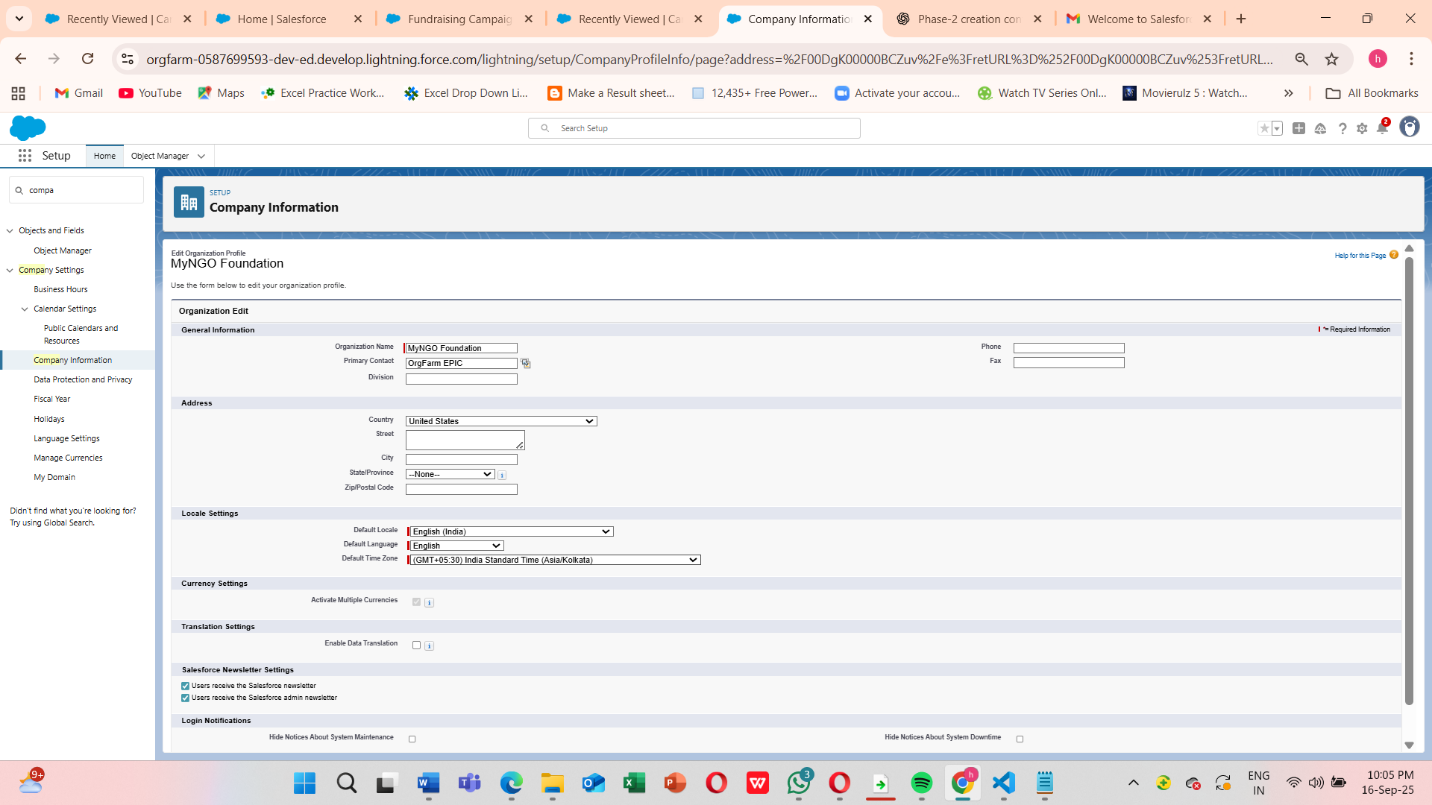


**2. Company Profile Setup**

Set up your company information to ensure correct branding and reporting.

**Steps:**

1. **Setup → Company Settings → Company Information**.
2. Fill in:
   * **Company Name**: “AI-Powered NGO Donation System”
   * **Primary Contact**
   * **Default Locale, Time Zone**
   * **Default Currency** (important if your NGO accepts multiple currencies)
3. Save changes.



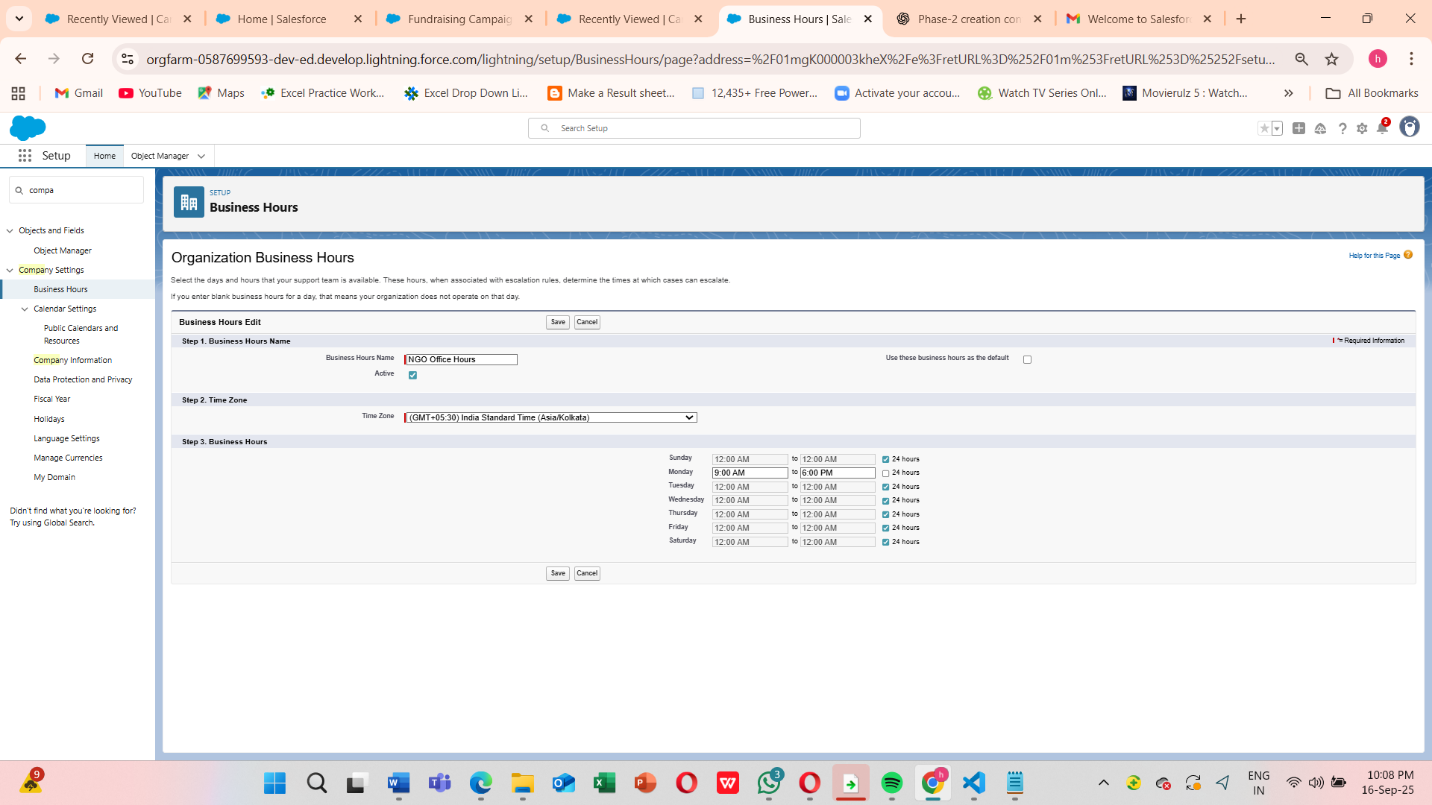
Ensures that reports, dashboards, and automated processes show accurate and localized data and Accurate company info ensures correct reporting, date/time handling, and currency calculations.

**3. Business Hours & Holidays**

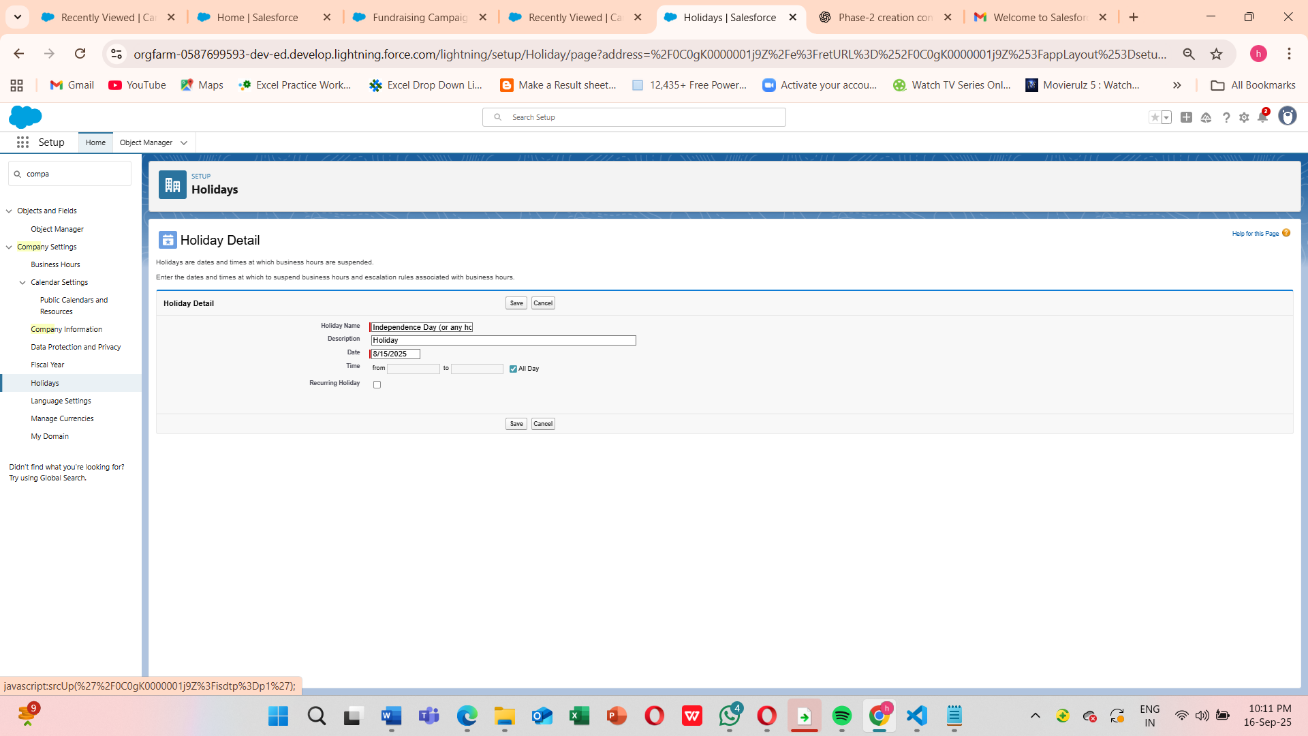
NGOs often have operations that need accurate service availability settings (for donor support, case management, etc.).

**Steps:**

1. Go to **Setup → Company Settings → Business Hours**.
2. Click **New** → Define standard hours for donor support (e.g., Mon-Fri, 9 AM–6 PM).



1. Setup → Holidays
2. Click New Holiday -> Add NGO-specific holidays (e.g., Foundation Day, Public Holidays)



Business Hours page with list view showing “NGO Operating Hours”. Holidays page listing multiple entries.

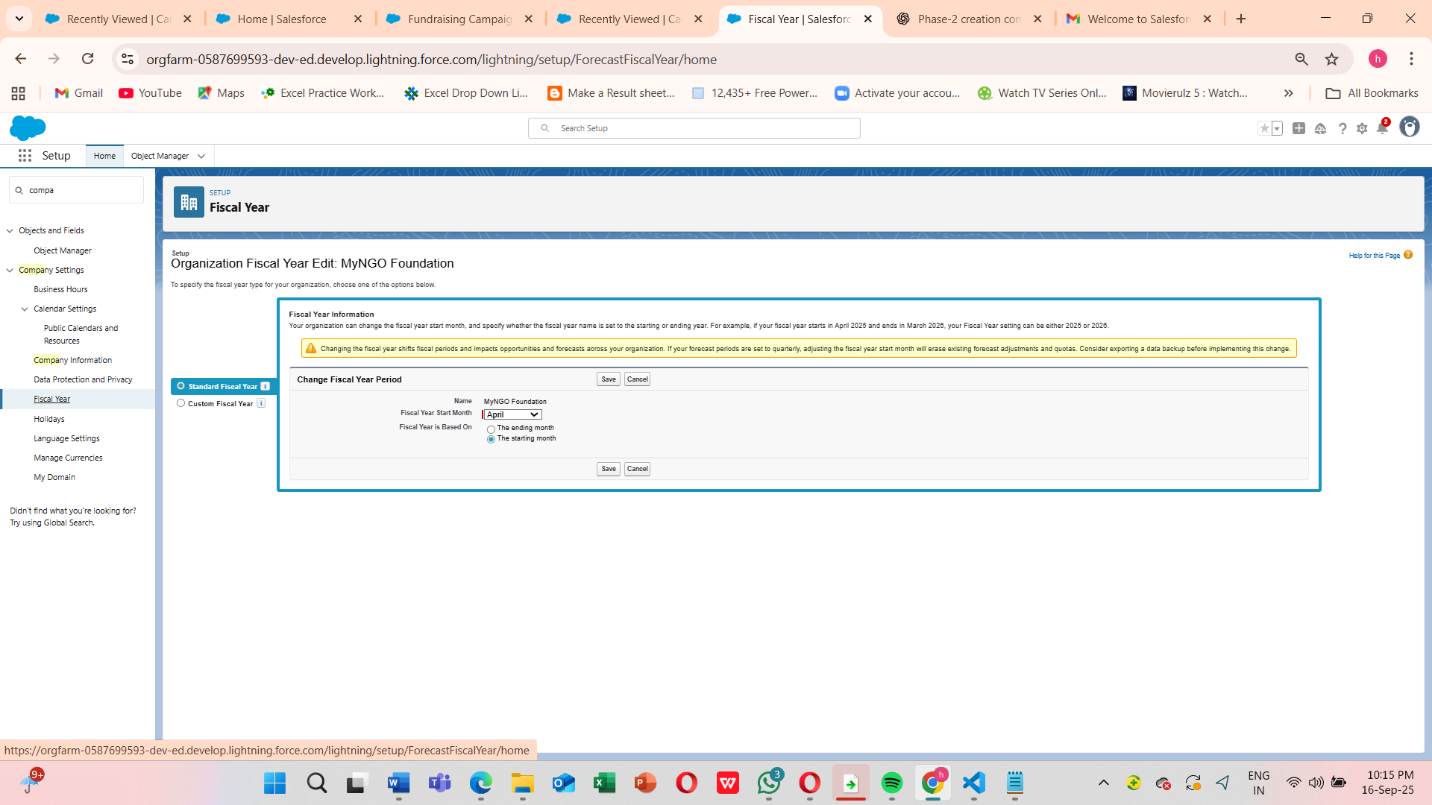
* Ensures that **case escalation rules, automated workflows, and AI notifications** respect business hours.

**4. Fiscal Year Settings**

This controls reporting and financial tracking for donations.

**Steps:**

1. **Setup → Company Settings → Fiscal Year**
2. Choose either **Standard Fiscal Year** (Jan–Dec) or **Custom Fiscal Year** (e.g., NGO operates Apr–Mar).
3. Save changes.



Fiscal Year page showing the selected start month and period.

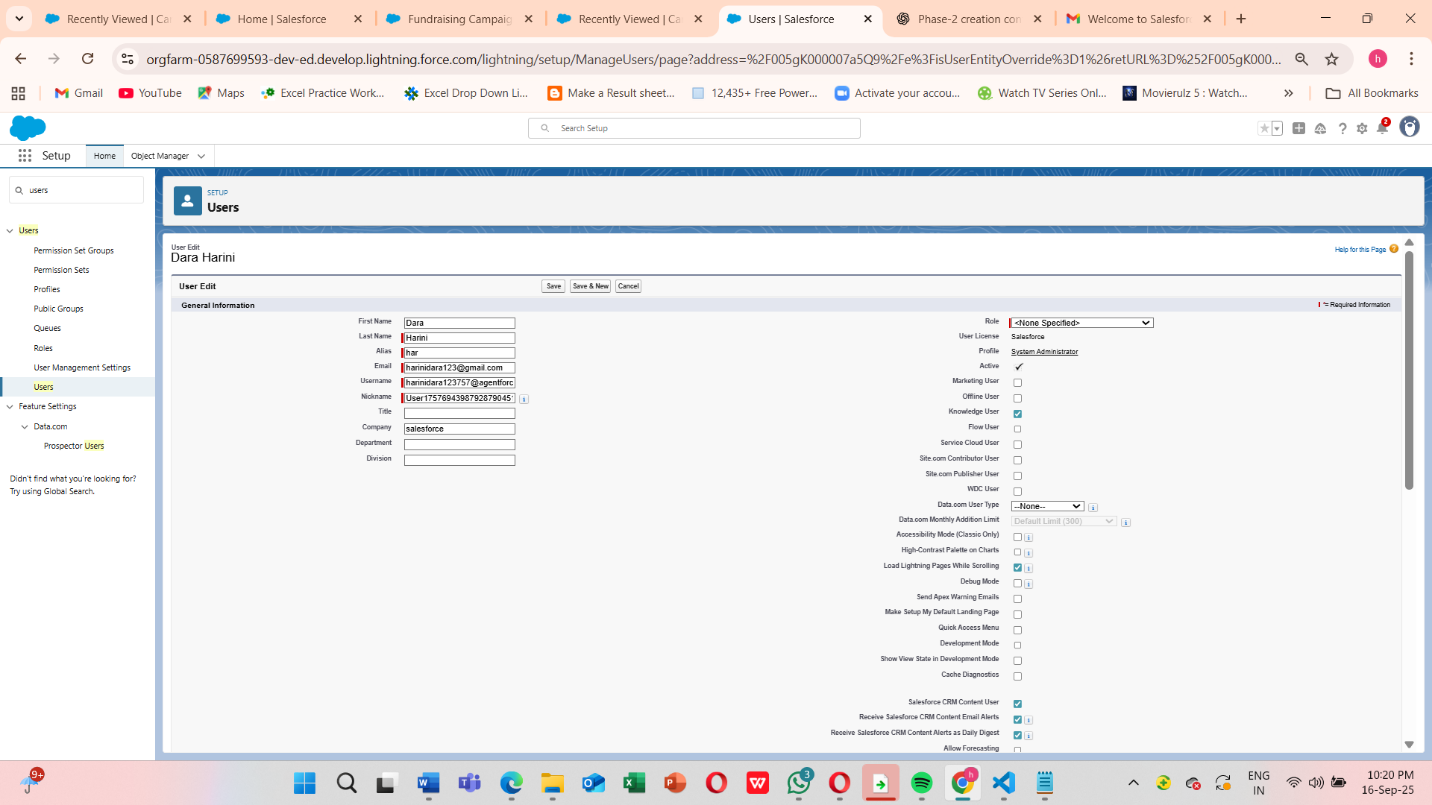
Accurate **donation reports, grant tracking, and AI predictions** rely on correct fiscal periods.

**5. User Setup & Licenses -> Creating Role Hierarchy**

Users must have proper licenses to access Salesforce features.

**Steps:**

1. **Setup → Users → Users → New User**
2. Assign:
   * **Full Name**
   * **Email**
   * **Role**
   * **Profile**
   * **License Type** (Salesforce Platform / Salesforce / Chatter Only)
3. Save and send **login credentials**.



Licenses define **permissions, access to objects, and AI features**. For example, a fundraiser may need full Salesforce license, while a volunteer coordinator may need only platform license.

New User” form with fields for Name, Email, Profile, Role, and License.

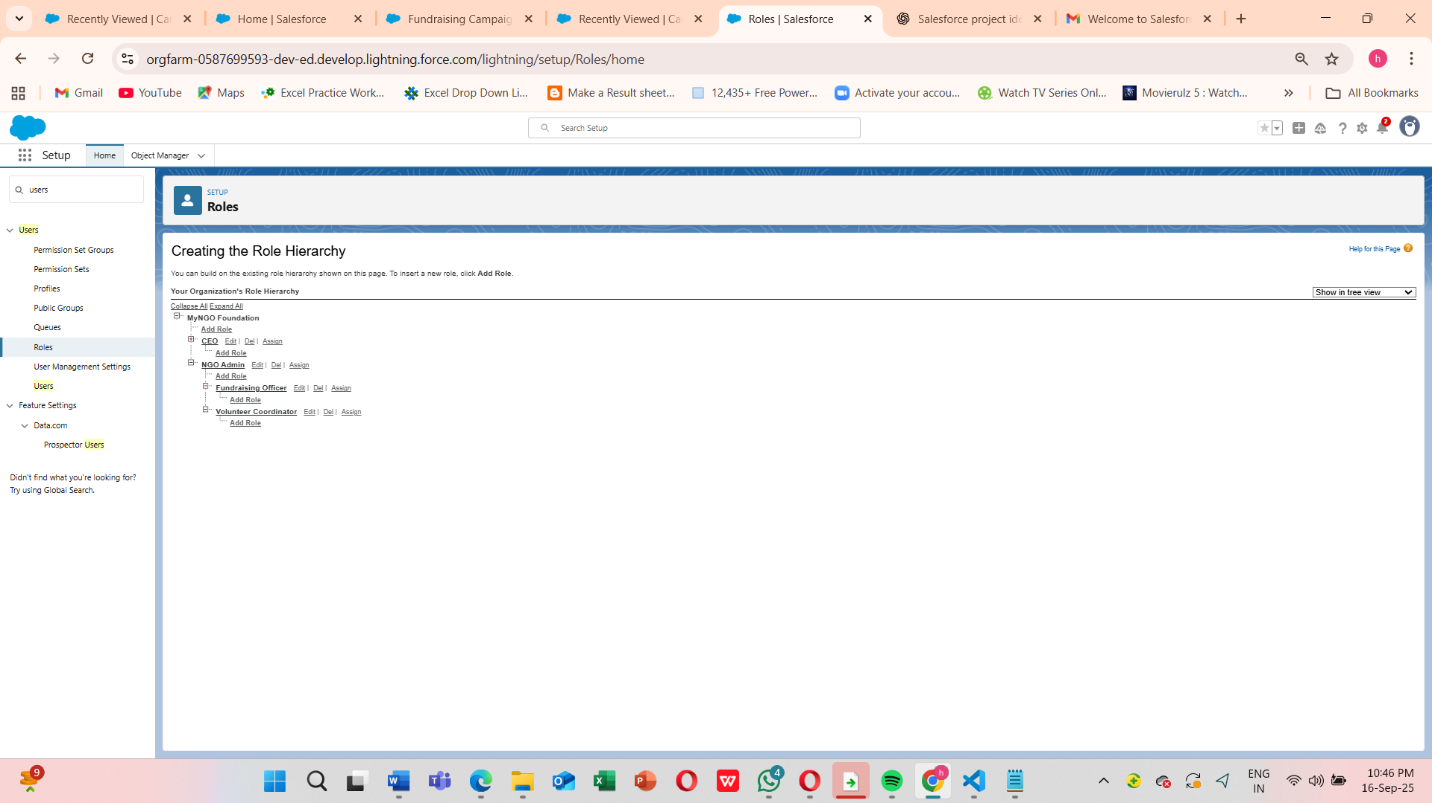
**6. Profiles**

Profiles define **baseline permissions** for objects, fields, and tabs.

**Steps:**

1. **Setup → Users → Profiles**
2. Create **custom profiles**:
   * Fundraiser Profile → Access to Donations, Campaigns, Reports
   * Volunteer Profile → Access to Cases, Tasks
   * Admin Profile → Full Access
3. Assign profiles to users.

**Roles**



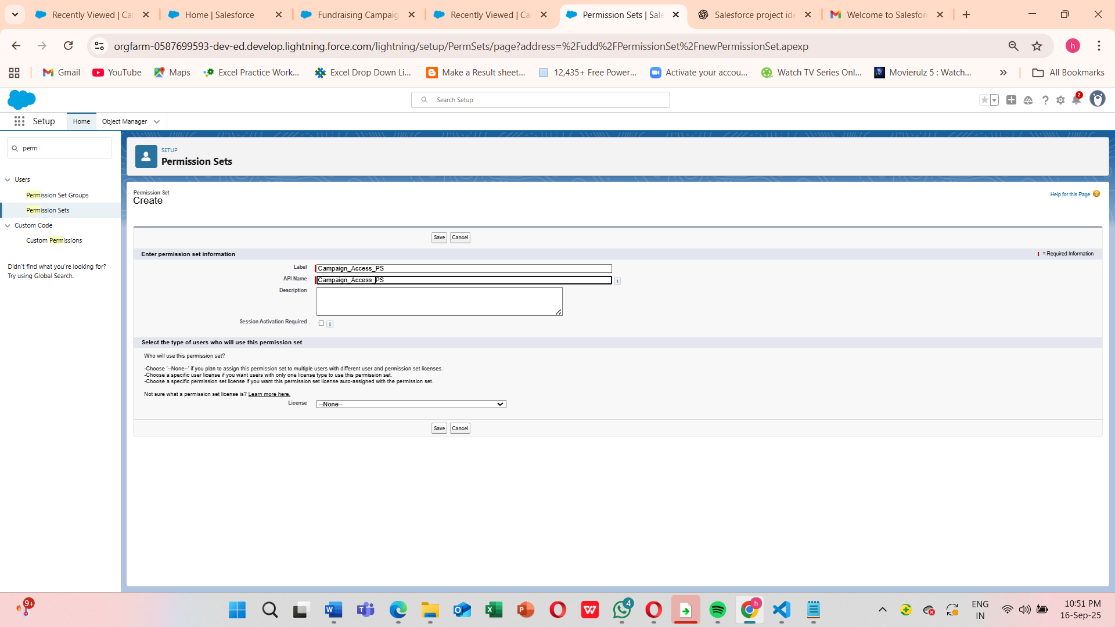
This is Profile detail page with object permissions visible.

**Create Permission Sets**

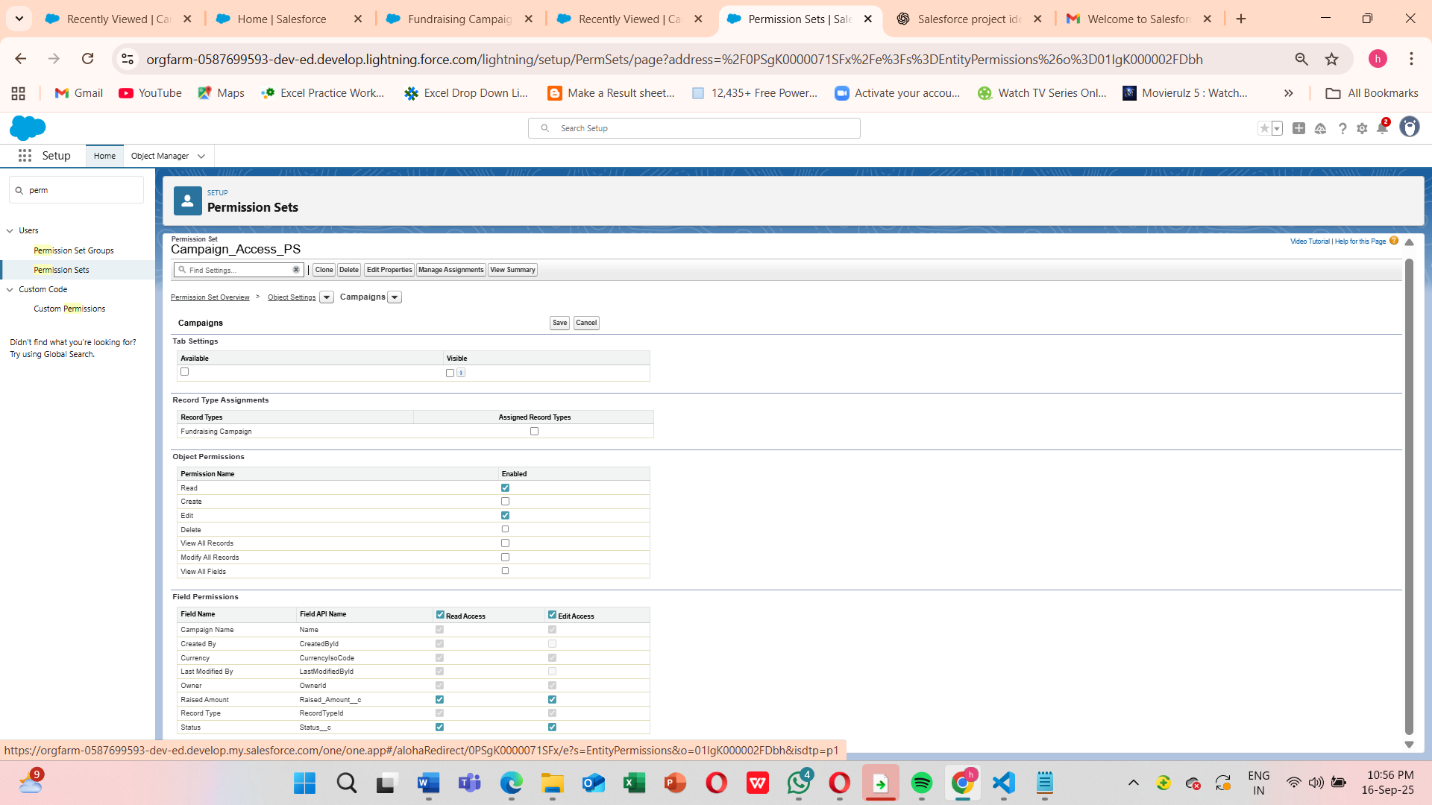
Setup → Permission Sets

**Steps:**

1. Click **New** → Name: Campaign\_Access\_PS
2. Object Settings → Campaign → Enable Read & Edit access
3. Assign this permission set to your **Fundraising Officer** user

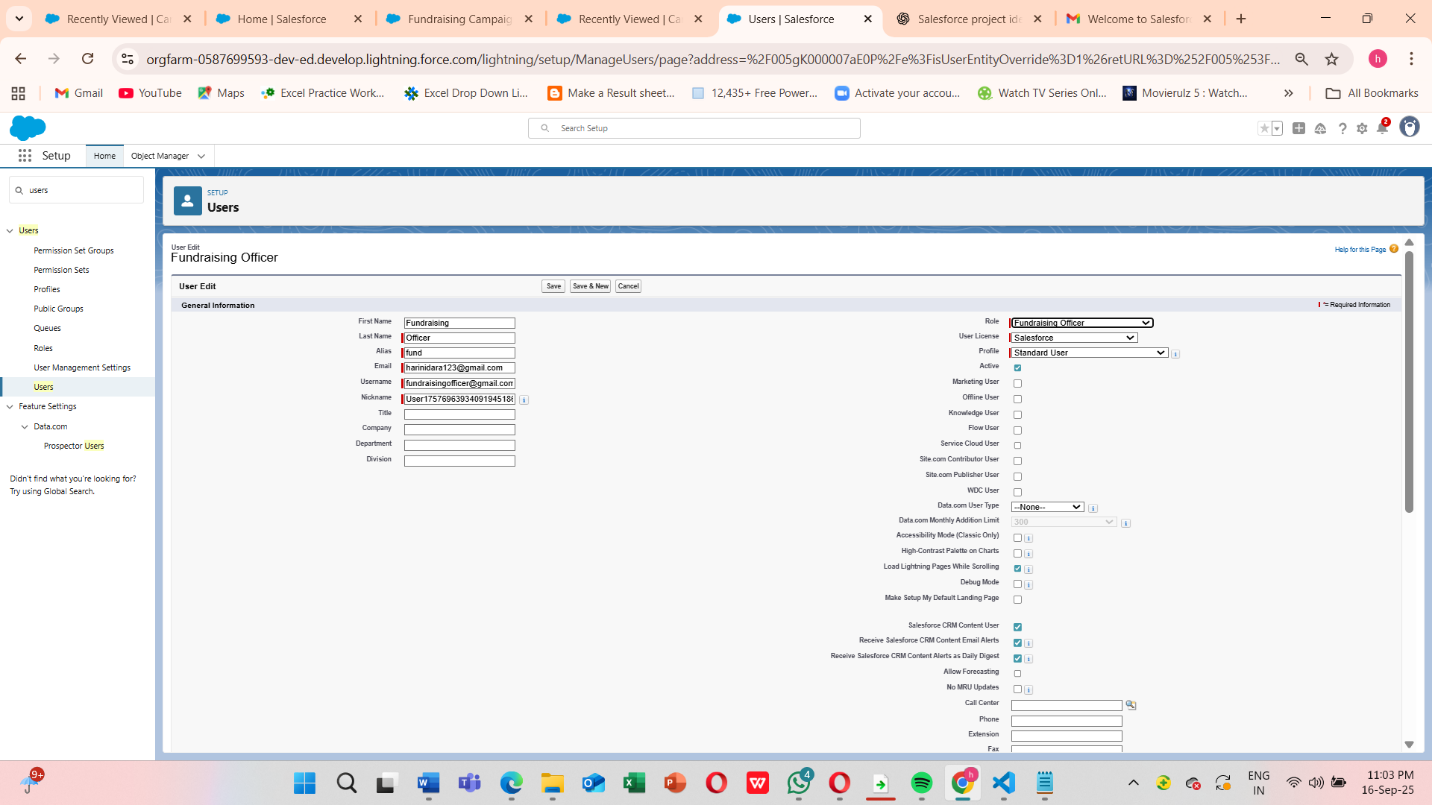
I

In Object settings , we see ->



Finally , **Assign Roles to Users**

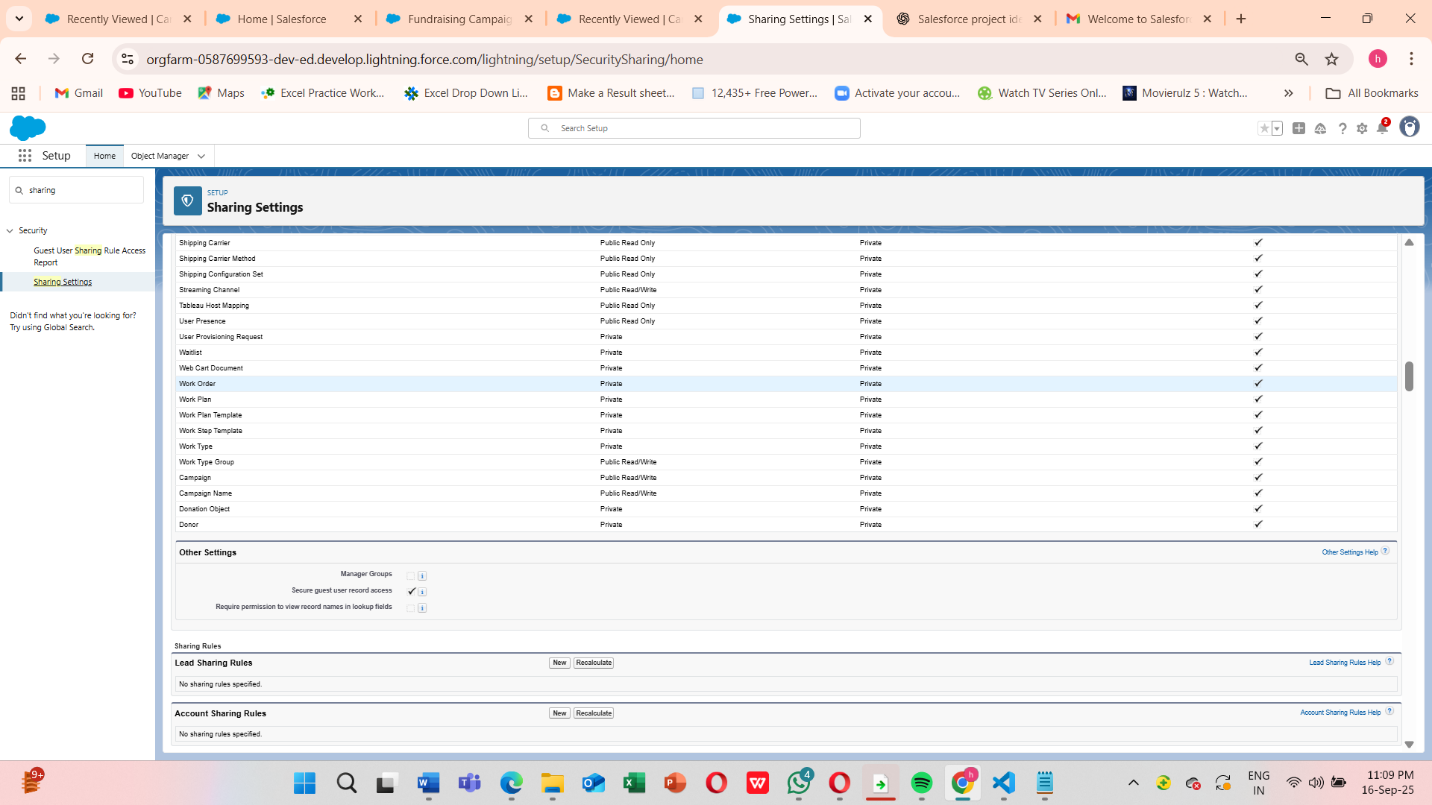
* Go to **Setup → Users → Users**
* Edit your Officer, Fundraising user → set **Role = Fundraising Officer**
* Save



**7.Set OWD (Organization-Wide Defaults)**

Donor & Donation data must be private by default.

* Setup → Sharing Settings
* Set Donor & Donation OWD = **Private**
* Save





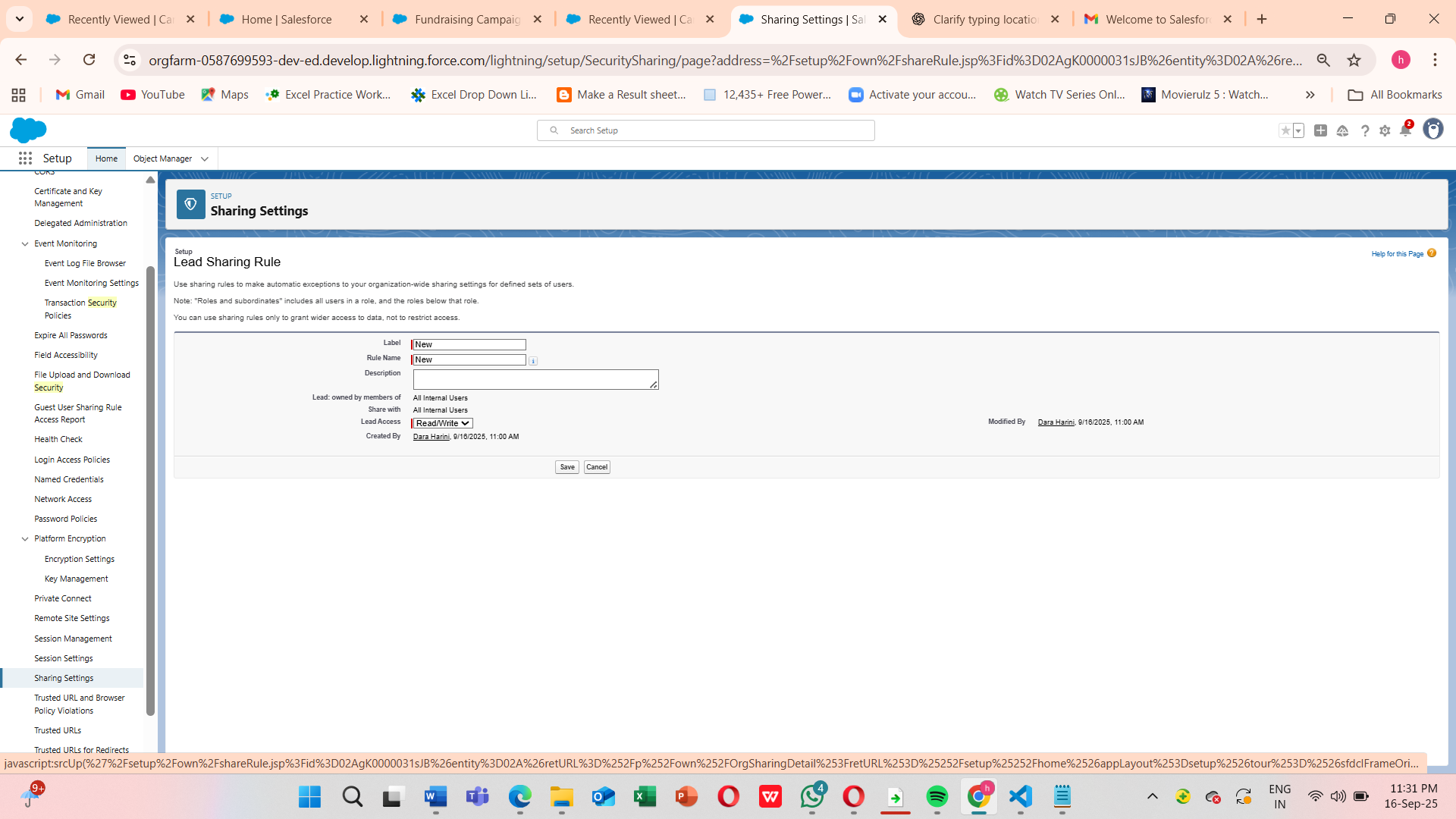
This ensures **donor confidentiality** while allowing collaboration on campaign-related activities

**8.Sharing Rules**

Sharing rules were configured to extend record access where necessary:

* Donations shared with Fundraising Managers (Read/Write)
* Campaigns shared with all volunteers (Read Only)

This balances **security with collaboration**, ensuring that only authorized users can access sensitive donation information.



Share Donations with the **Manager role** so they can view all donations

**9.Login Access Policies**

Define’s how users access Salesforce securely.

1. Setup → Security → Login Access Policies

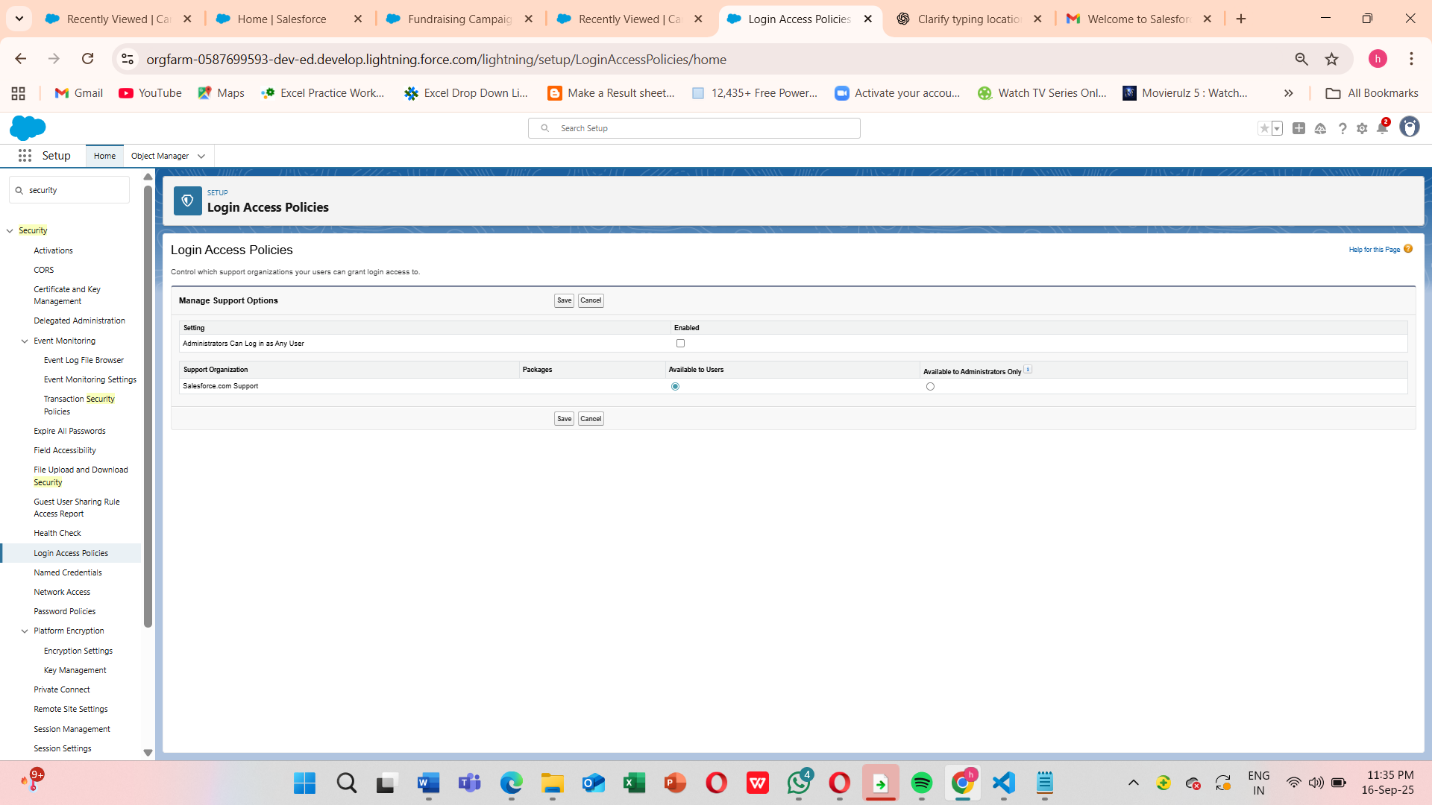
2. Options:

IP Restrictions

Login Hours

Two-Factor Authentication

3.For NGO: Allow login from office IPs + mobile devices securely.



**10. Developer Org Setup**

Create **sandbox or developer environment** for testing before production.

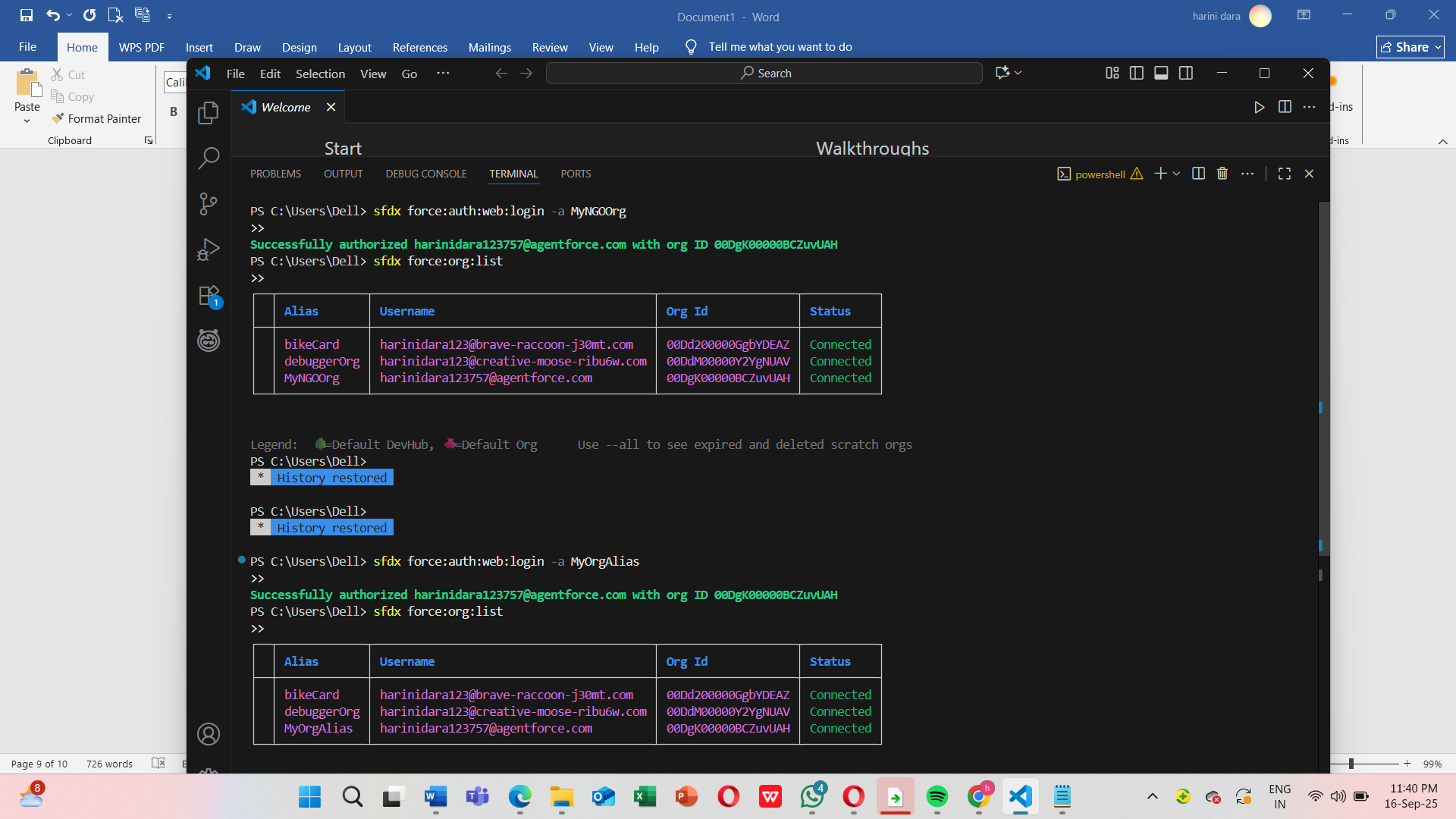
1. Sign up: [https://developer.salesforce.com/signup](https://developer.salesforce.com/signup)

2. Use Dev Org for:

Custom object creation (Donations, Projects)

Automation testing

New NPSP featurer



**Connecting Your Org with VS Code**

Since you've already set up your Salesforce org and connected it with VS Code, you can now manage and deploy your metadata locally. Here's how to proceed:

**1. Authenticate Salesforce CLI with Your Org**

If you haven't authenticated yet, run the following command in your VS Code terminal:

**sfdx force:auth:web:login -a MyNGOOrg**

This will open a browser window for you to log in to your Salesforce org.

**2. Retrieve Metadata from Your Org**

To bring your existing objects and fields into VS Code, run:

**sfdx force:source:retrieve -m CustomObject:Donor,CustomObject:Campaign,CustomObject:Donation**

This command fetches the metadata for your Donor, Campaign, and Donation objects.

**3. Make Changes Locally**

* Edit fields, page layouts, or add new components as needed.
* Use VS Code's Salesforce extensions to streamline your development process.

**4. Deploy Changes Back to Salesforce**

After making changes, deploy them back to your org using:

**sfdx force:source:deploy -p force-app/main/default/objects/Donor\_\_c**

**sfdx force:source:deploy -p force-app/main/default/objects/Campaign\_\_c**

**sfdx force:source:deploy -p force-app/main/default/objects/Donation\_\_c**