Project Title: Volunteer & Donation Management App

- **Industry**: Nonprofit
- **Project Type**: Salesforce CRM Implementation
- **Target Users**: Donors, Volunteers, Nonprofit Administrators, Fundraising Managers

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Problem Statement

Nonprofits face several challenges in managing donor and volunteer activities effectively. Current manual processes result in inefficiencies and reduced engagement:

- Difficulty in efficiently tracking donor contributions.
- Lack of timely receipts and acknowledgment for donations.
- Volunteer hours and efforts are not systematically recorded.
- No structured way to motivate or recognize top donors and volunteers.
- Limited visibility through reports and dashboards.
- Manual approval processes for high-value donations create delays.
- No seamless integration with payment gateways.

Project Objectives

- Track donor contributions and link them to campaigns.
- Record volunteer hours and associate them with specific campaigns.
- Automate thank-you notes and donation receipts.
- Recognize and engage supporters using gamification (leaderboards, badges).
- Provide real-time dashboards and reports for management insights.
- Enable manager approval workflows for high-value donations.
- Integrate with payment gateways (Stripe/PayPal).
- Ensure robust data security with Salesforce security models.

Donor & Donation Management

- Track donors and donations with campaign relationships.
- Automatically generate receipts for donations.

Volunteer Management

- Track volunteer details and volunteer hours.
- Link volunteer hours to campaigns.

Automation

- Auto-send thank-you notes and receipts to donors.
- Automate approval workflows for large donations.

Gamification

- Leaderboard for top donors and volunteers.
- Badges for recognition of significant contributions.

Reports & Dashboards

- Donation trends per campaign.
- Top donors and top volunteers.
- Monthly impact reports.

Integrations

- Payment gateway integration (Stripe, PayPal).
- Real-time leaderboard updates with Lightning Web Components (LWC).

Security

- Role-based access control with Profiles and Roles.
- Field-Level Security (FLS) and Organization-Wide Defaults (OWD).
- Sharing rules for controlled record visibility.