

Volunteer & Donation Management System

Data Modeling & Object Creation :

In this phase, we design and create the **custom objects, fields, and relationships** required for the Volunteer & Donation Management System (VDMS). The goal is to establish the **data model** that will support tracking donors, donations, volunteers, volunteer hours, and campaign performance.

1. Donor:

Object Name: `Donor__c`

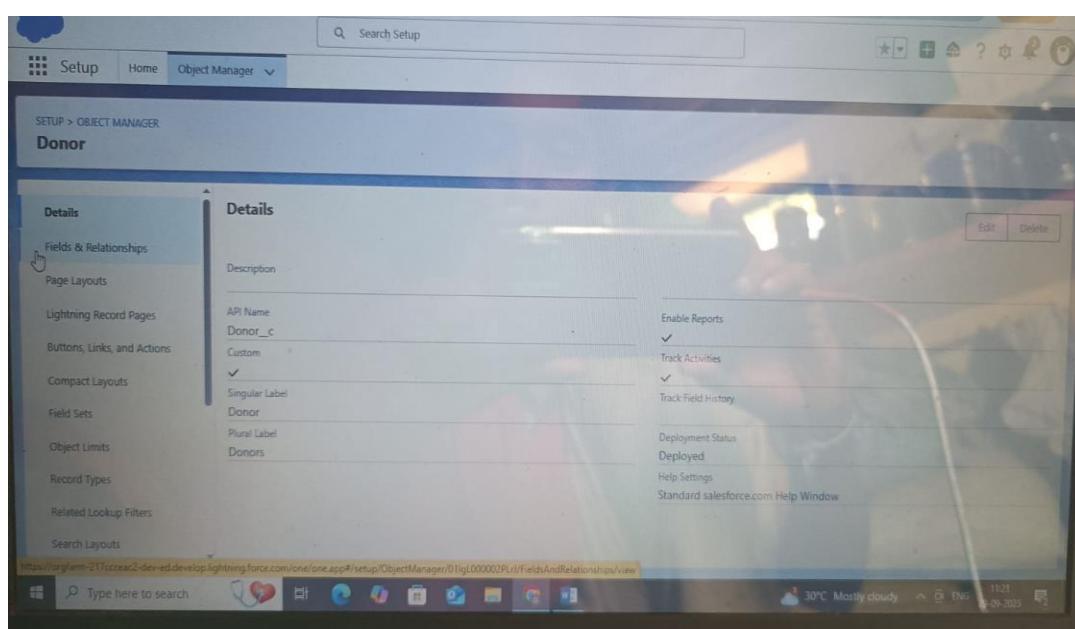
Type: CustomObject

Purpose:

The `Donor__c` object is created to store and manage all information related to individuals or organizations who contribute donations. Each record represents a unique donor and links to their donations, volunteer contributions, and campaigns.

Key Features

- Central repository for **donor profiles**.
- Tracks **personal details and contact information**.
- Stores **donation history** (via related `Donation__c` records).
- Helps in **engagement management** (acknowledgments, campaigns).
- Supports **gamification leaderboards** (Top Donors).



Fields in Donor__c:

Field Label	API Name	Type	Details
Donor Name	Name	Text (80)	Primary field to store donor's name (individual/organization).
Email	Email__c	Email	Email address for communication and receipts.
Phone Number	Phone__c	Phone	Contact number of the donor.
Address	Address__c	Text Area	Mailing address.
Total Donations	Total_Donations__c	Currency(18,2)	Auto-calculated (Roll-up Summary of all Donation__c).
Active Donor?	Active_Donor__c	Checkbox	Indicates whether donor is currently active.



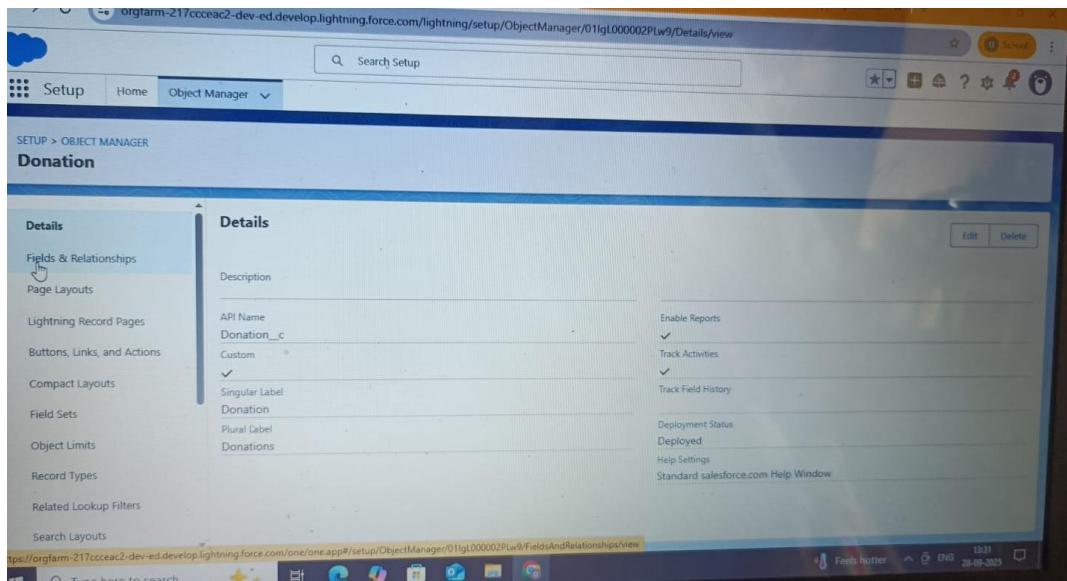
2.Donation:

Object Name: Donation__c

Type: Custom Object

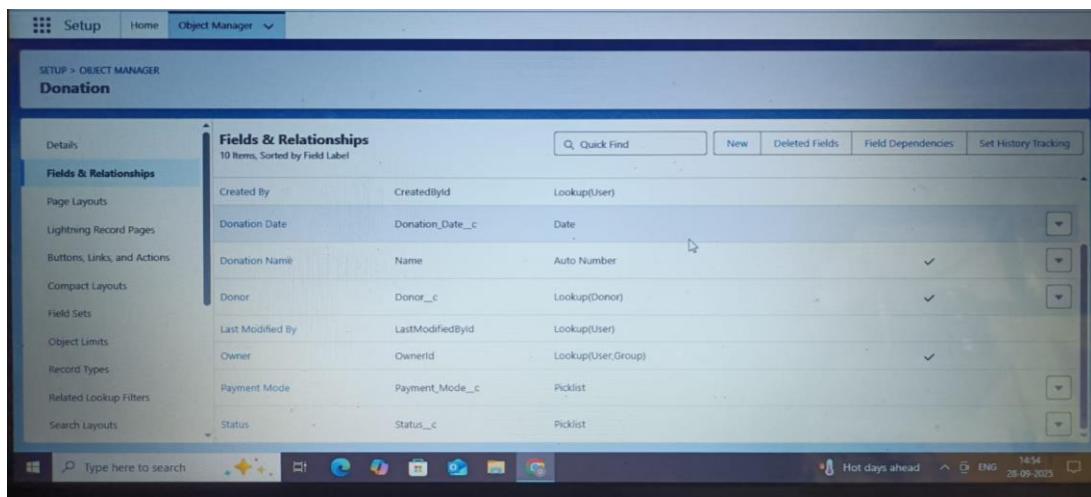
Purpose

The **Donation__c** object is designed to capture and track all donation transactions made by donors. Each record represents a single donation and is linked to both the donor and optionally a campaign. It forms the financial backbone of the Volunteer & Donation Management System.



Key Fields:

Field Label	API Name	Type	Details
Amount	Amount__c	Currency	Required. Captures the donated amount.
Donation Date	Donation_Date__c	Date	Required. The date the donation was made.
Payment Mode	Payment_Mode__c	Picklist	Values: Cash, Card, UPI, Online.
Status	Status__c	Picklist	Values: Pending, Received, Refunded.
Donor	Donor__c	Lookup	Lookup to Donor__c object (donor who donated).
Campaign	Campaign__c	Lookup	Lookup to Campaign object (campaign supported).



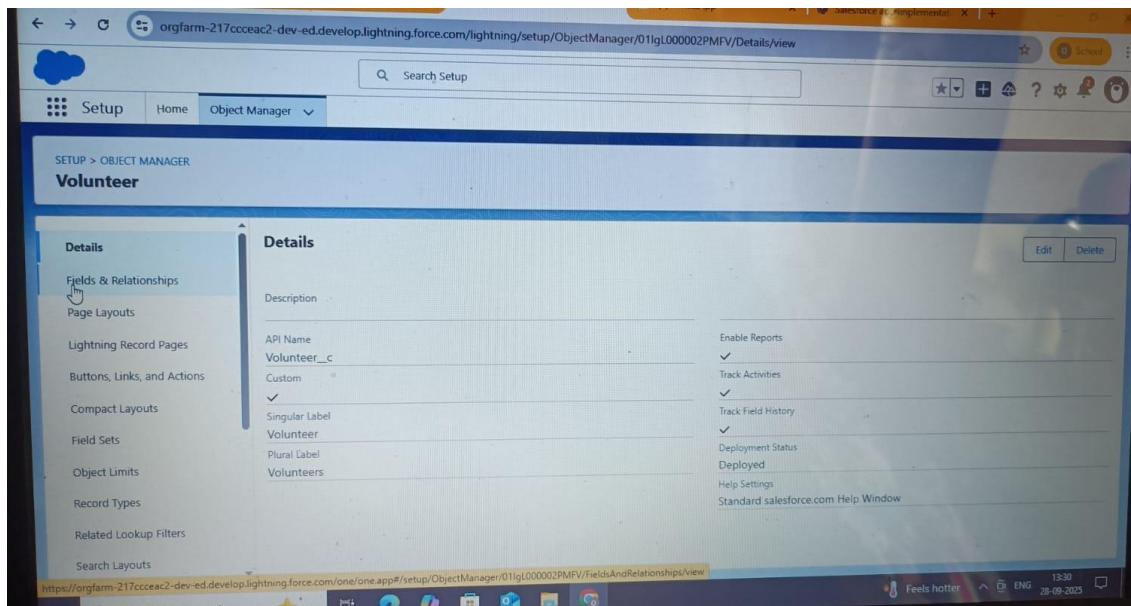
3. Volunteer:

Object Name: Volunteer__c

Type: Custom Object

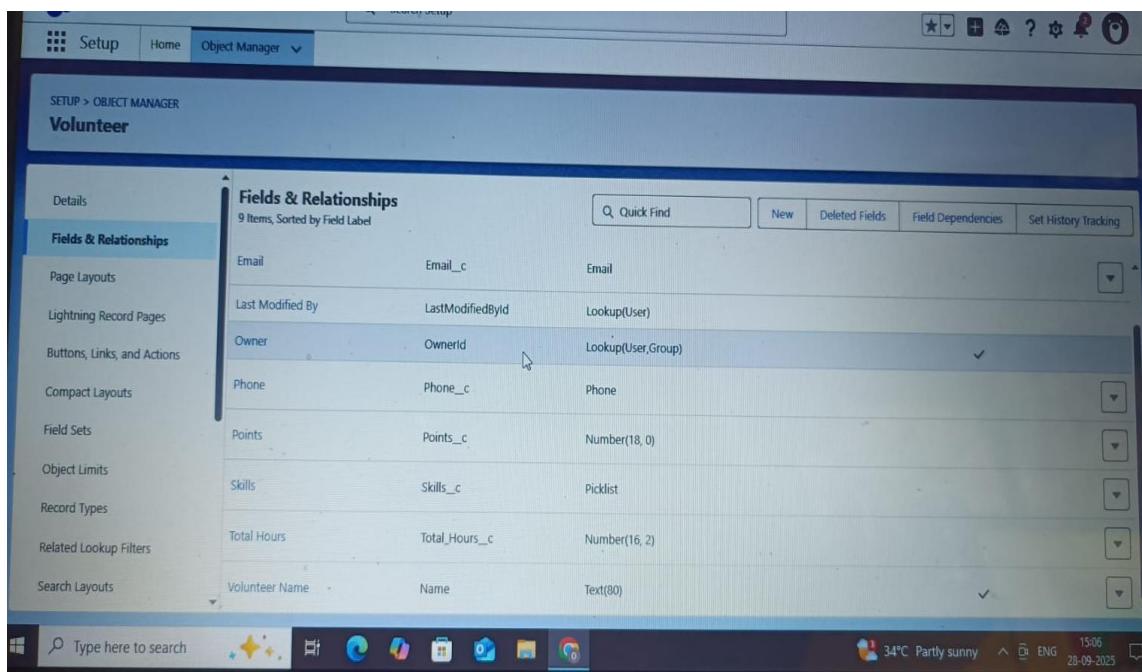
Purpose

The **Volunteer__c** object is used to manage and track information about individuals who contribute their **time and effort** to the organization. It helps nonprofits record volunteer details, availability, assigned events/campaigns, and total hours contributed.



Field Label	API Name	Type	Details
Volunteer Name	Name	Text (80)	Primary field to store volunteer's full name.
Email	Email__c	Email	Volunteer's email (used for communication and scheduling).
Phone Number	Phone__c	Phone	Volunteer's contact number.
Address	Address__c	Text Area	Mailing address of the volunteer.
Volunteer Type	Volunteer_Type__c	Picklist	Values: Individual, Student, Corporate, Community Member.
Skills	Skills__c	Multi-Select Picklist	E.g., Teaching, Fundraising, Event Management, IT Support.

Availability	Availability__c	Picklist	Options: Weekdays, Weekends, Evenings, Flexible.
Total Hours Contributed	Total_Hours__c	Number(8,2)	Roll-up Summary from Volunteer_Hours__c (junction object).
Active Volunteer?	Active_Volunteer__c	Checkbox	Marks if the volunteer is currently engaged in activities.
Preferred Contact Method	Preferred_Contact__c	Picklist	Options: Email, Phone, SMS.

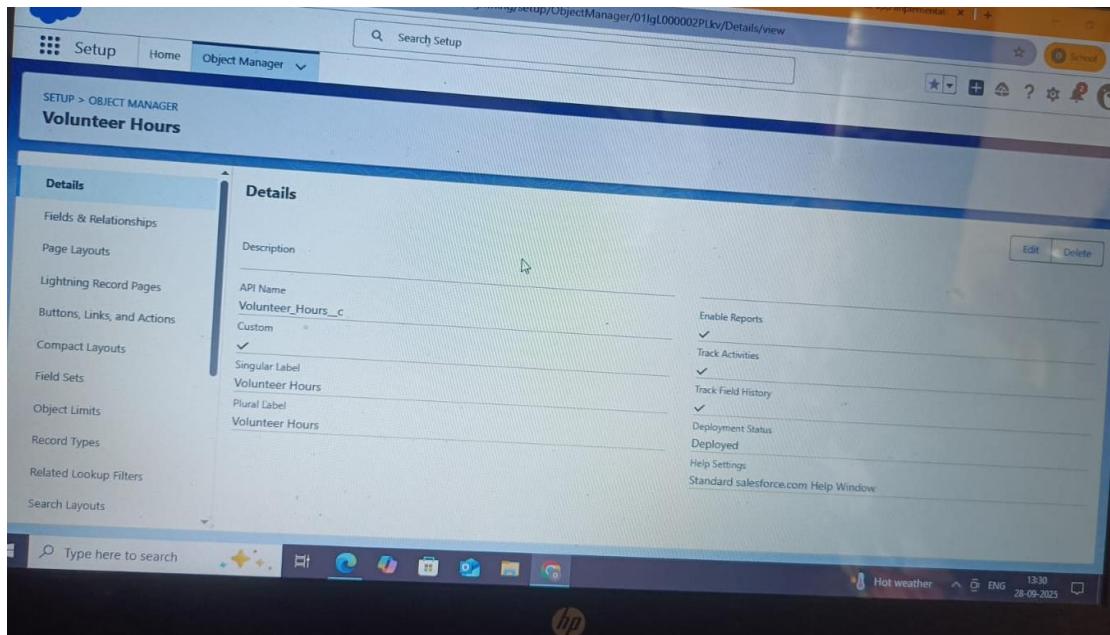


4.Volunteer_Hours:

Object Name: Volunteer_Hours__c
Type: Custom Object (Junction Object)

Purpose:

The **Volunteer_Hours__c** object records the number of hours each volunteer contributes to specific campaigns or events. It acts as a **junction object** between **Volunteer__c** and **Campaign**, allowing many-to-many relationships.



Field Label	API Name	Type	Details
Record Name	Name	Auto Number	Unique identifier (e.g., VH-0001).
Volunteer	Volunteer__c	Lookup → Volunteer__c	Links record to the Volunteer who worked.
Campaign/Event	Campaign__c	Lookup → Campaign	Links record to the Campaign/Event supported.
Date of Contribution	Contribution_Date__c	Date	Date when volunteer hours were contributed.
Hours Contributed	Hours__c	Number(5,2)	Number of hours worked (supports decimal for partial hours).
Activity Type	Activity_Type__c	Picklist	Values: Teaching, Event Support, Fundraising, Admin Work, Other.
Notes	Notes__c	Text Area	Additional details about the work done.
Approved?	Approved__c	Checkbox	Marks if volunteer hours are reviewed/approved by admin.

The screenshot shows the Salesforce Object Manager interface for the 'Volunteer Hours' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main area is titled 'Fields & Relationships' and contains a table with 9 items, sorted by Field Label. The table columns are Field Name, API Name, and Description.

Field Name	API Name	Description
Campaign	Campaign_c	Lookup(Campaign)
Created By	CreatedById	Lookup(User)
Date	Date_c	Date
Hours	Hours_c	Number(16, 2)
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Volunteer	Volunteer_c	Lookup(Volunteer)
Volunteer Hours Name	Name	Auto Number

5.Campaign Object:

Object Name: Campaign (*Standard Salesforce Object*)

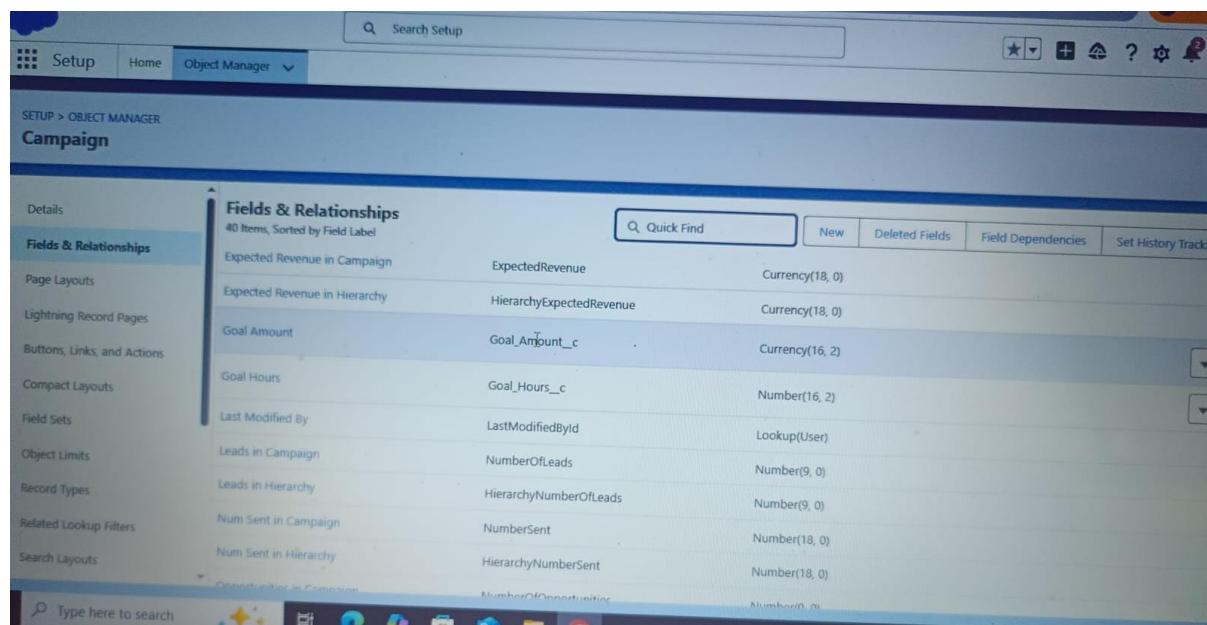
Purpose:

The **Campaign** object is used to manage and track fundraising, awareness, or volunteer engagement initiatives. It serves as a central hub to link **Donors**, **Donations**, and **Volunteers** to specific organizational goals.

The screenshot shows the Salesforce Object Manager interface for the 'Campaign' object. The left sidebar lists various setup categories. The main area is titled 'Details' and shows the configuration for the 'Campaign' object, including its API name, singular and plural labels, and various settings like Enable Reports and Track Activities.

Setting	Value
Description	
API Name	Campaign
Custom	
Singular Label	Campaign
Plural Label	Campaigns
Enable Reports	
Track Activities	
Track Field History	
Deployment Status	
Help Settings	Standard salesforce.com Help Window

Field Label	API Name	Type	Details
Campaign Name	Name	Text (80)	Primary field to store campaign/event name.
Campaign Type	Type	Picklist	Values: Fundraising, Awareness, Volunteer Drive, Education, Health, Other.
Start Date	StartDate	Date	Date when the campaign begins.
End Date	EndDate	Date	Date when the campaign ends.
Status	Status	Picklist	Values: Planned, In Progress, Completed, On Hold, Cancelled.
Goal Amount	Goal_Amount__c	Currency	Target fundraising goal for the campaign.
Actual Amount Raised	AmountRaised__c	Currency	Roll-up Summary of Donation__c amounts linked to campaign.
Total Volunteers	Total_Volunteers__c	Number(8,0)	Roll-up Summary from Volunteer_Hours__c records.



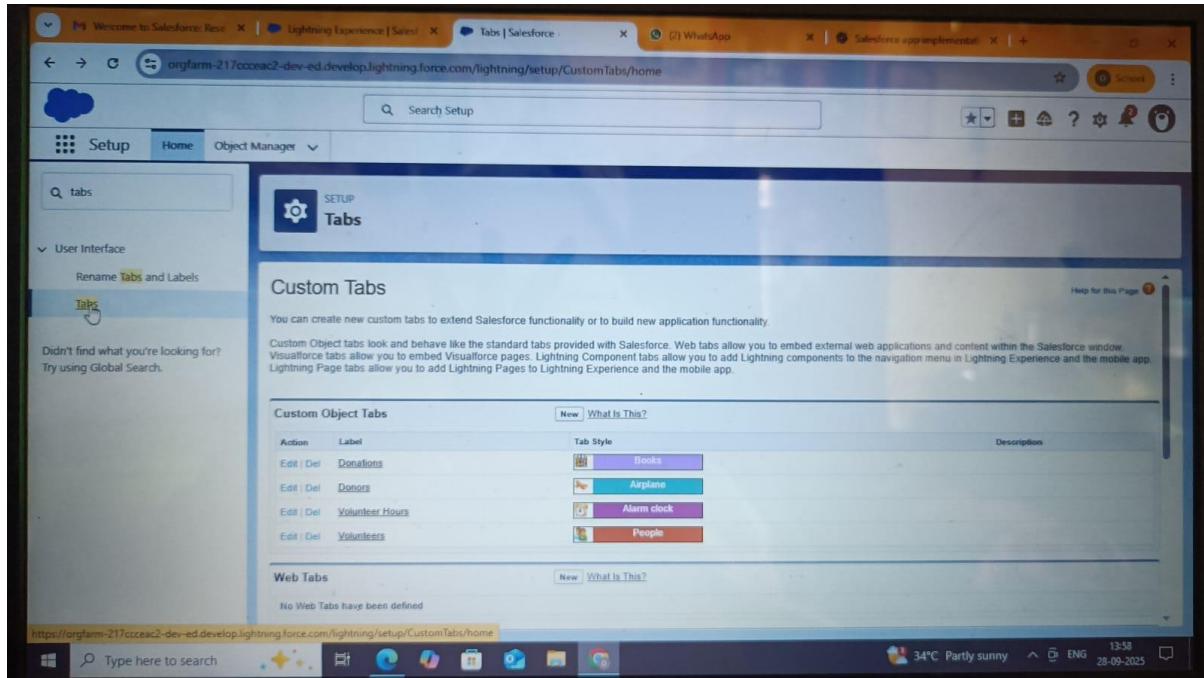
Tab Creation:

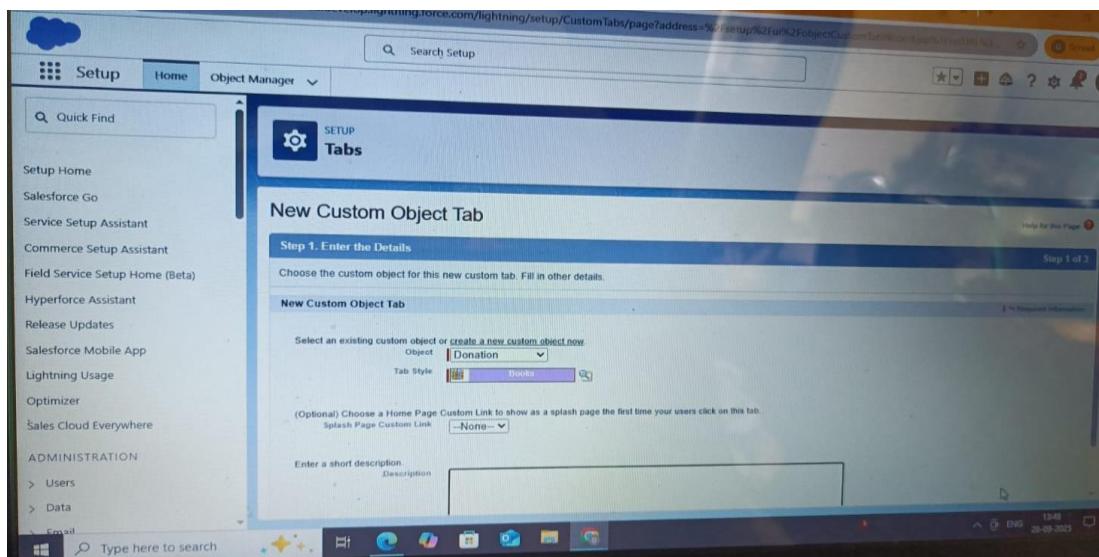
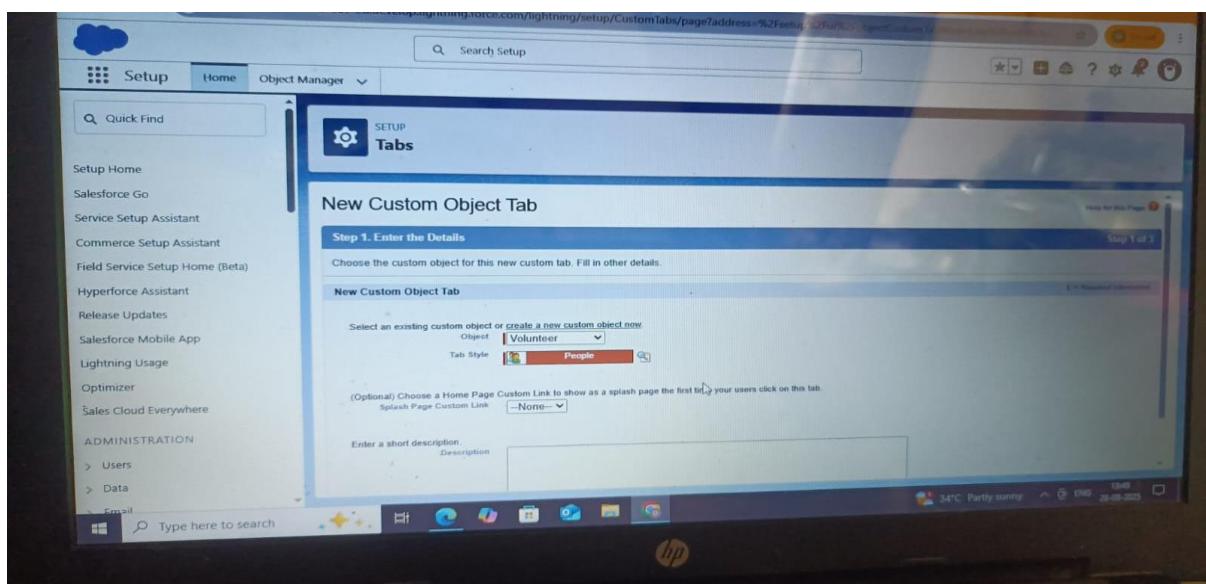
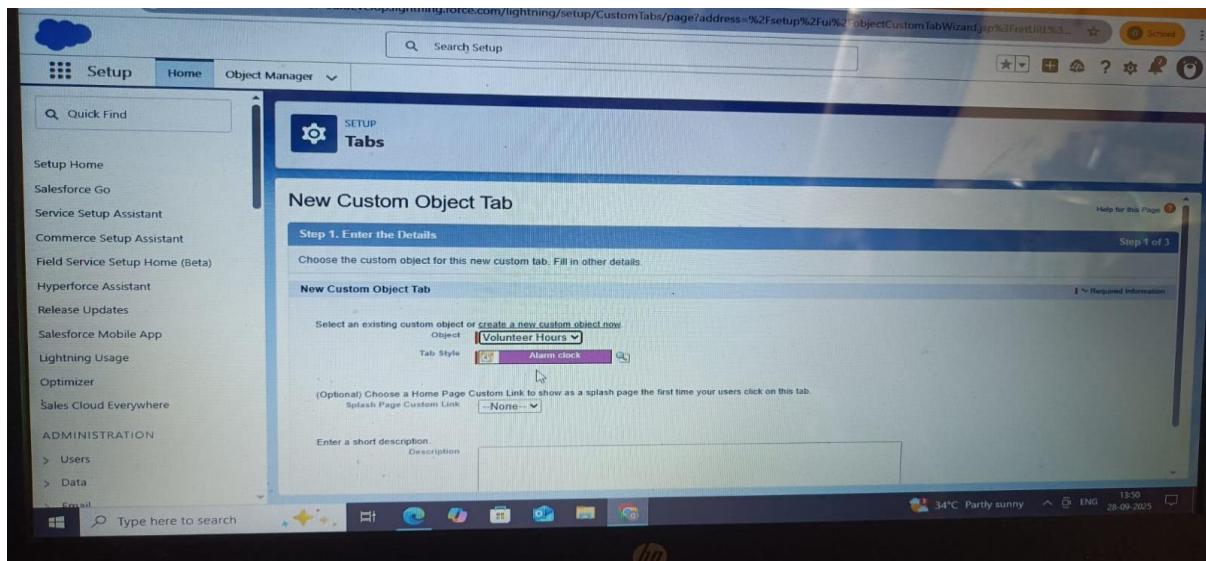
Purpose:

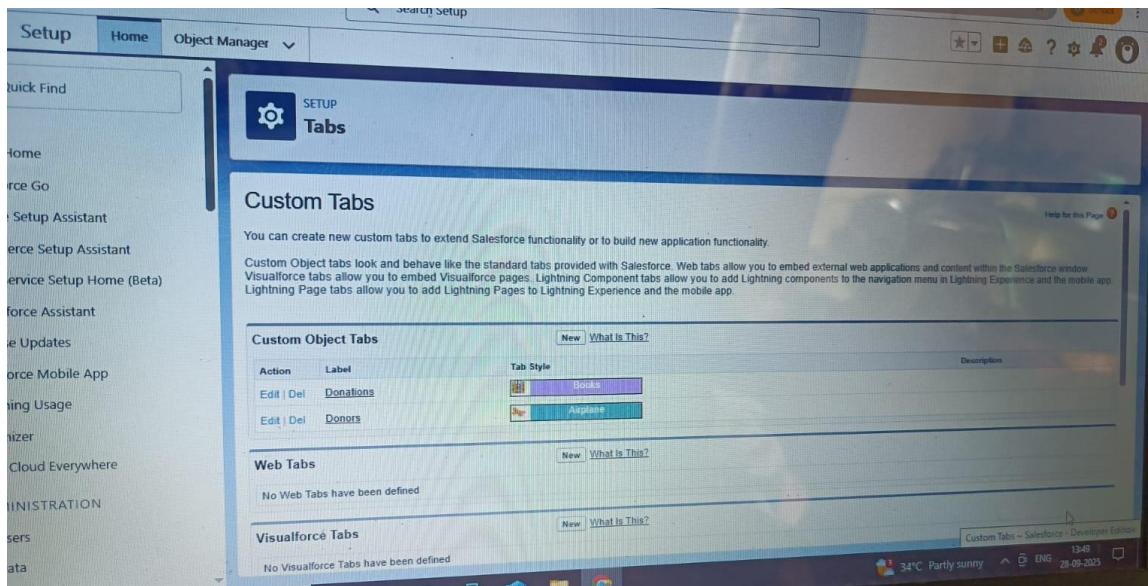
Tabs in Salesforce provide a **UI entry point** for users to access objects, reports, or Visualforce/LWC pages. For the Volunteer & Donation Management System, **custom tabs** are created for all custom objects to allow easy access from the Salesforce app.

Custom Tabs to be Created:

1. **Donor Tab**
 - o **Object:** Donor__c
 - o **Tab Style:** Airplane
 - o **Purpose:** Allows users to view, create, and manage donor records.
2. **Donation Tab**
 - o **Object:** Donation__c
 - o **Tab Style:** Books
 - o **Purpose:** Enables users to track donations, add new donations, and view donation history.
3. **Volunteer Tab**
 - o **Object:** Volunteer__c
 - o **Tab Style:** People
 - o **Purpose:** Allows tracking of volunteers and their profiles.
4. **Volunteer Hours Tab**
 - o **Object:** Volunteer_Hours__c
 - o **Tab Style:** Alarm Clock
 - o **Purpose:** Allows logging of hours contributed by volunteers per campaign.
5. **Campaign Tab**
 - o **Object:** Campaign (Standard)







App Manager & Lightning App Documentation:

Purpose

Salesforce **App Manager** allows administrators to **create custom apps** that bundle related tabs, objects, and utilities into a single interface. For the Volunteer & Donation Management System (VDMS), creating a **Lightning App** ensures users can access **donors, donations, volunteers, campaigns, and reports** from a single workspace.

1. Lightning App Overview

App Name: Volunteer & Donation Management App

App Type: Lightning

Purpose: Provides a unified interface for nonprofit administrators, fundraisers, and volunteers to manage donors, donations, campaigns, and volunteer hours.

Key Components:

- Tabs: Donor, Donation, Volunteer, Volunteer Hours, Campaign, Reports, Dashboards
- Utility Bar: Quick actions like *Log Volunteer Hours, Add Donation, Send Thank-You Email*
- Branding: Custom logo and color theme to represent the non-profit

App Name: Volunteer & Donation Management

Developer Name: auto-generated

Description: “Salesforce Lightning App to manage donors, donations, volunteers, and campaigns.”

Salesforce app implementation

orgfarm-217ccceac2-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Cloud School

Setup Home Object Manager

Search Setup

App Manager

External Client Apps

External Client App Manager

Didn't find what you're looking for?
Try using Global Search.

Lightning Experience App Manager

27 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

App Name ↑	Developer ...	Description	Last Modified... ↓	App Type	Vl... ↓
1 All Tabs	AllTabSet		9/17/2025, 5:45 A...	Classic	✓
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	9/17/2025, 5:45 A...	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	9/17/2025, 5:45 A...	Classic	✓
4 Approvals	Approvals	Manage approvals and approval flows	9/17/2025, 5:45 A...	Lightning	✓
5 Automation	FlowsApp	Automate business processes and repetitive tasks.	9/17/2025, 5:52 A...	Lightning	✓
6 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your indu...	9/17/2025, 5:45 A...	Lightning	✓
7 Community	Community	Salesforce CRM Communities	9/17/2025, 5:45 A...	Classic	✓
8 Content	Content	Salesforce CRM Content	9/17/2025, 5:45 A...	Classic	✓
9 Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	9/17/2025, 5:45 A...	Lightning	✓
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage re...	9/17/2025, 5:45 A...	Lightning	✓
11 Developer Edition	Developer_Edition	Welcome to your Developer Edition Org.	9/17/2025, 5:59 A...	Lightning (Managed)	✓

https://orgfarm-217ccceac2-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Very high UV 15:39 ENG 28-09-2025

Type here to search

New Lightning App

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items C Create ▾

- Q ca Appointment Categories
- N Calculated Insights
- Calendar
- Capability Details

Selected Items

- Volunteer Hours
- Volunteers
- Donations
- Donors
- Campaigns

Back Next

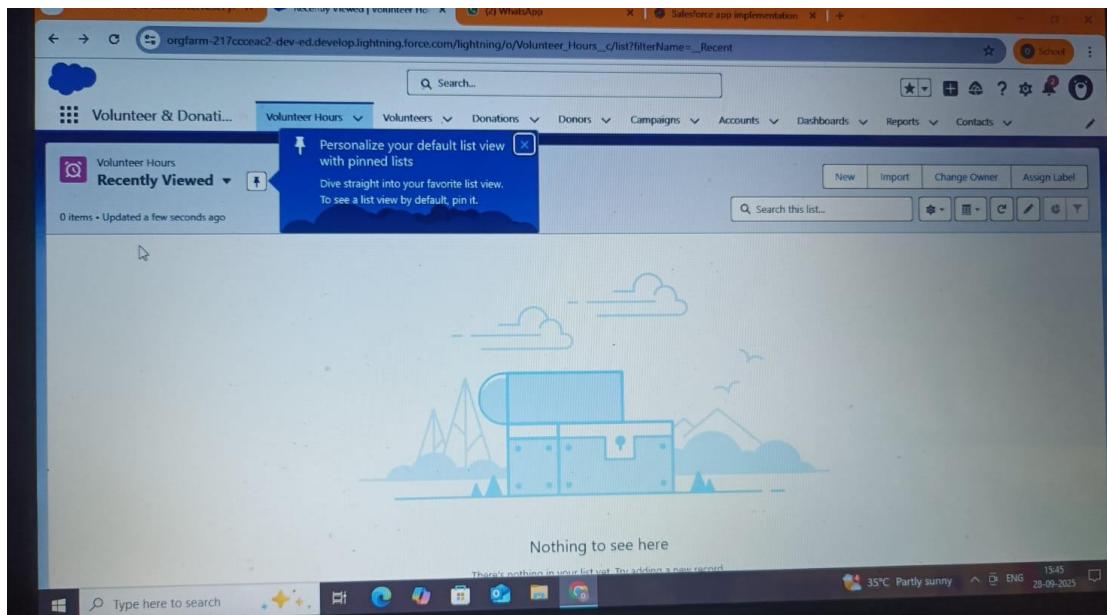
Did you know? Build a thorough and complete understanding of your customers by reviewing Audience360 data. Learn more

10 Data Manager DataManager Use Data Manager to view limits, monitor usage, and manage re... 9/17/2025, 5:45 A... Lightning ✓

11 Developer Edition Developer_Edition Welcome to your Developer Edition Org. 9/17/2025, 5:59 A... Lightning (Managed) ✓

35°C Partly sunny 15:42 ENG 28-09-2025

Type here to search



Email Templates:

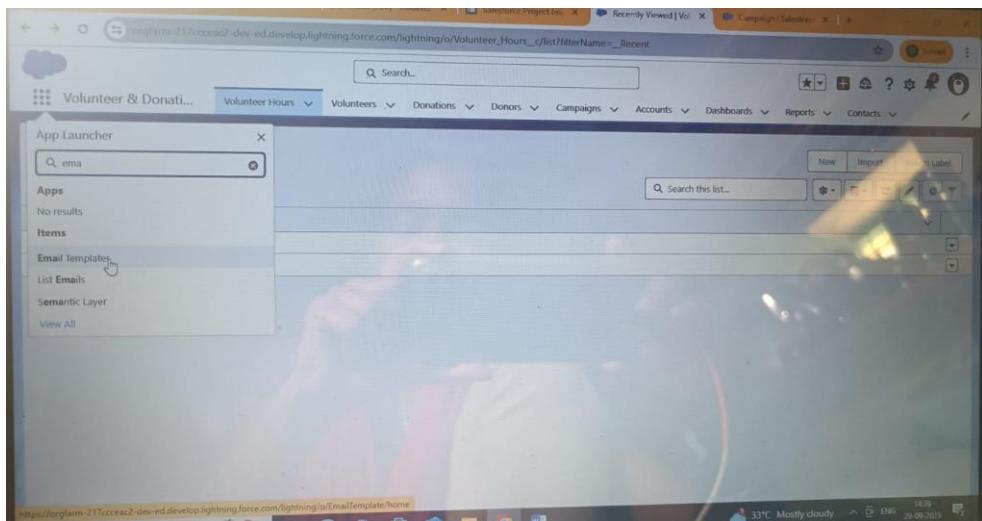
Purpose

Email templates in Salesforce allow sending **standardized emails** automatically to donors, volunteers, or campaign managers. This ensures **timely communication**, professional appearance, and reduces manual work.

Template Name	Object	Purpose
Donation Thank-You Email	Donation__c	Sends acknowledgement & receipt to donors
Volunteer appreciation Email	Volunteer__c	After one month/week we are appreciate

Outcome

- Donors automatically receive **acknowledgments and receipts**.
- Volunteers are recognized automatically for milestones.
- Managers get **weekly campaign updates** without manual intervention.
- High-value donations are flagged and reviewed promptly.
- Automation reduces **manual errors** and improves **engagement**.



Donation Thank-You Email Template

Template Name: Donation Thank-You Email

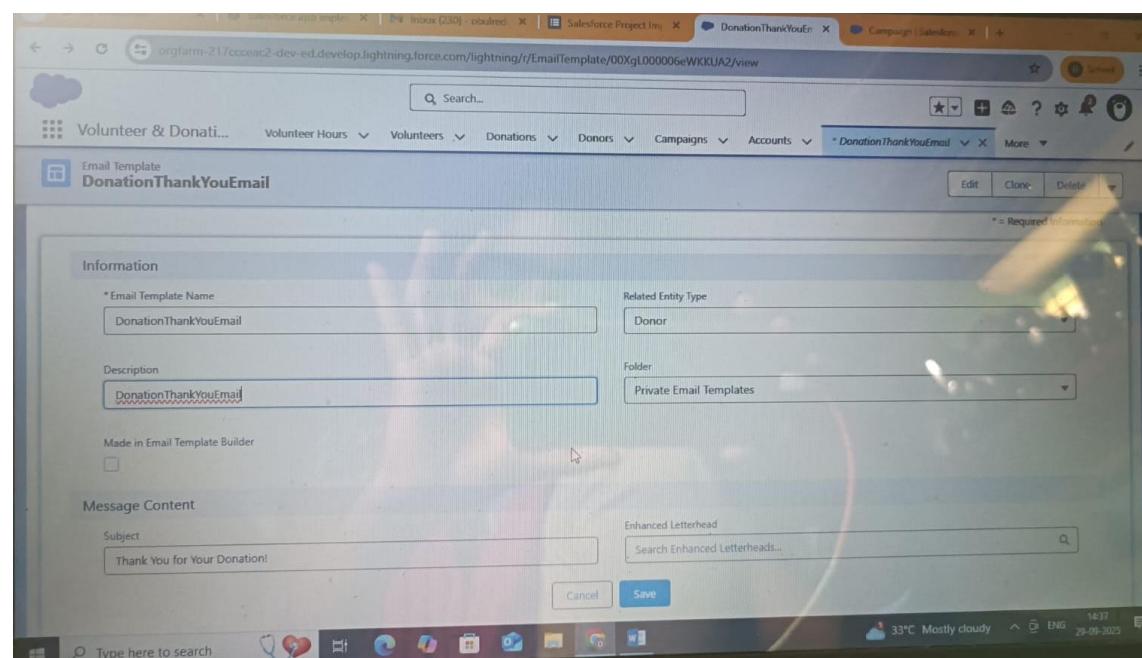
Type: HTML (with Merge Fields)

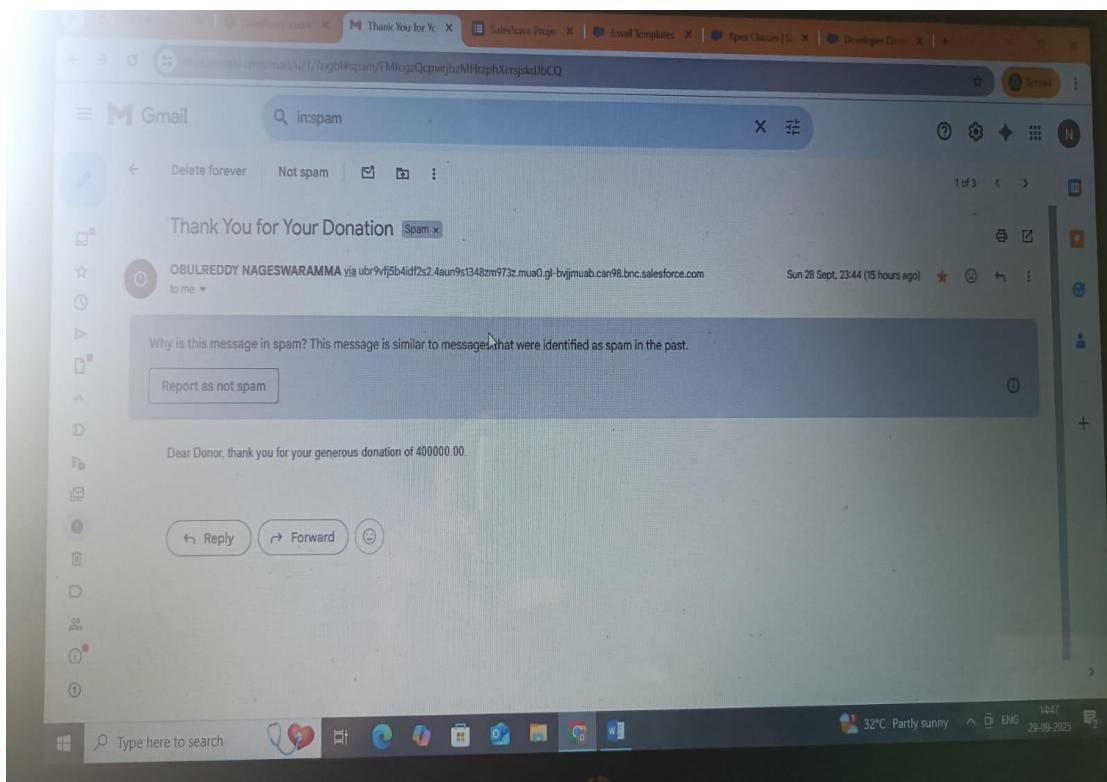
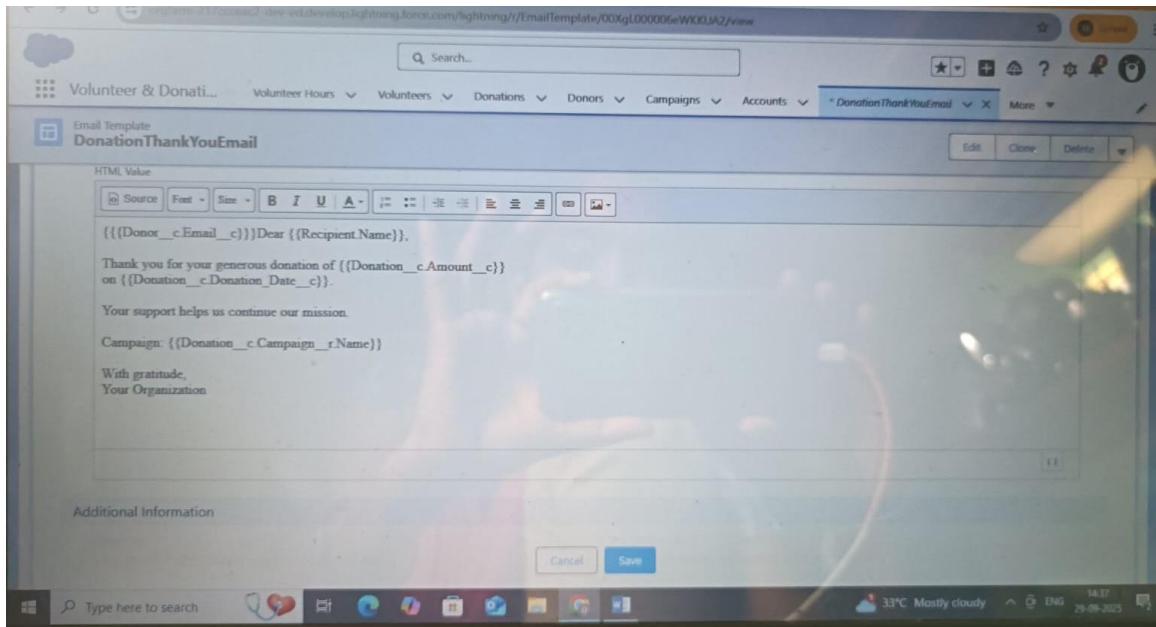
Object: Donation__c

Key Notes

1. Merge Fields Used:

- { !Donor__c.Name } → Donor's Name
- { !Donation__c.Donation_Amount__c } → Donation Amount
- { !Donation__c.Donation_Date__c } → Donation Date
- { !Campaign.Name } → Campaign Name





Apex Classes & Scheduled Jobs Documentation:

Purpose

Apex classes and scheduled jobs enable **programmatic automation**, handling scenarios that declarative tools cannot fully manage. This includes batch updates, scheduled reminders, or complex calculations.

Components

1. **Apex Class: DonationEmailSender**
 - Handles the **email generation and sending** logic.
 - Formats the email body with merge fields such as:
 - Donor Name (`Donor__c.Name`)
 - Donation Amount (`Donation__c.Donation_Amount__c`)
 - Donation Date (`Donation__c.Donation_Date__c`)
 - Campaign Name (`Campaign__c.Name`)
 - Uses `Messaging.SingleEmailMessage` to send emails via Salesforce.
 2. **Apex Trigger: DonationTrigger**
 - Triggered **after insert** and **after update** of `Donation__c` records.
 - Checks if the **Status** is “Received” and ensures emails are sent **only once** per donation.
 - Calls the `DonationEmailSender.sendThankYouEmails` method to handle the actual email delivery.
-

Business Logic / Workflow

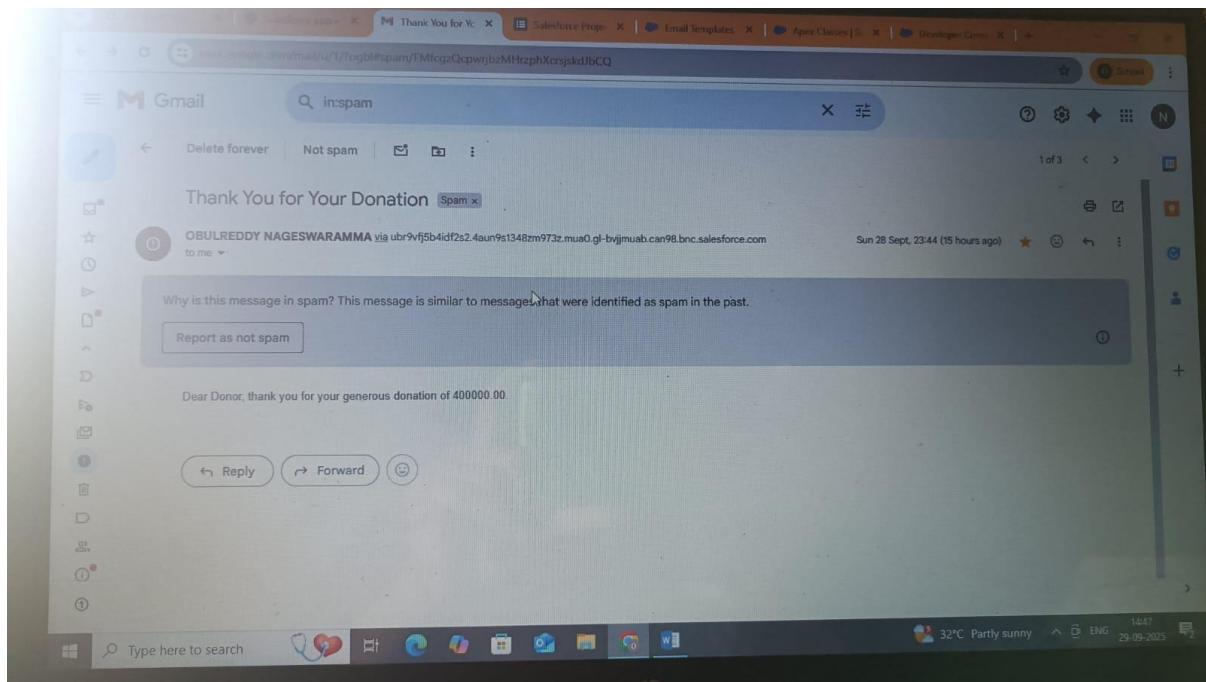
1. **Trigger Condition:**
 - Donation record is inserted or updated.
 - Status changes from **Pending** → **Received** (prevents duplicate emails).
 2. **Action:**
 - Personalized thank-you email is generated and sent to the donor.
 - Includes donation amount, date, and campaign details.
 3. **Outcome:**
 - Donors automatically receive a **professional acknowledgment**.
 - Administrative effort is reduced.
 - Strengthens donor engagement and supports retention efforts.
-

Benefits

- **Automation:** No manual effort required to acknowledge donations.
- **Personalization:** Donors receive emails with their own donation details.
- **Reliability:** Ensures every confirmed donation triggers an acknowledgment.
- **Scalable:** Can handle multiple donations and large donor bases efficiently.

```
1 public with sharing class DonationThankYouEmailHandler {
2     public static void sendThankYouEmail(List<Donation__c> donations) {
3         for (Donation__c donation : donations) {
4             if (donation.Status__c == 'Received' && donation.Donor__c != null) {
5
6                 // Query donor safely
7                 List<Donor__c> donorList = [
8                     SELECT Id, Email__c
9                         FROM Donor__c
10                        WHERE Id = :donation.Donor__c
11                           LIMIT 1
12             ];
13         }
14     }
15 }
```

```
1 trigger DonationTrigger on Donation__c (after insert, after update) {
2     DonationThankYouEmailHandler.sendThankYouEmail(Trigger.new);
3 }
```



Volunteer Appreciation Email Template:

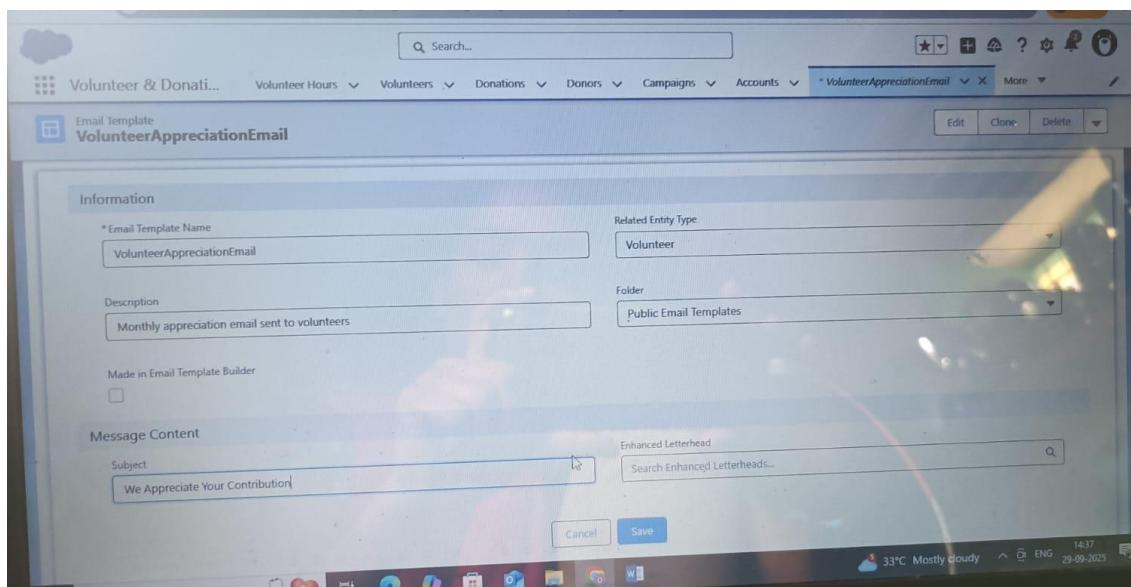
Template Name: Volunteer Appreciation Email

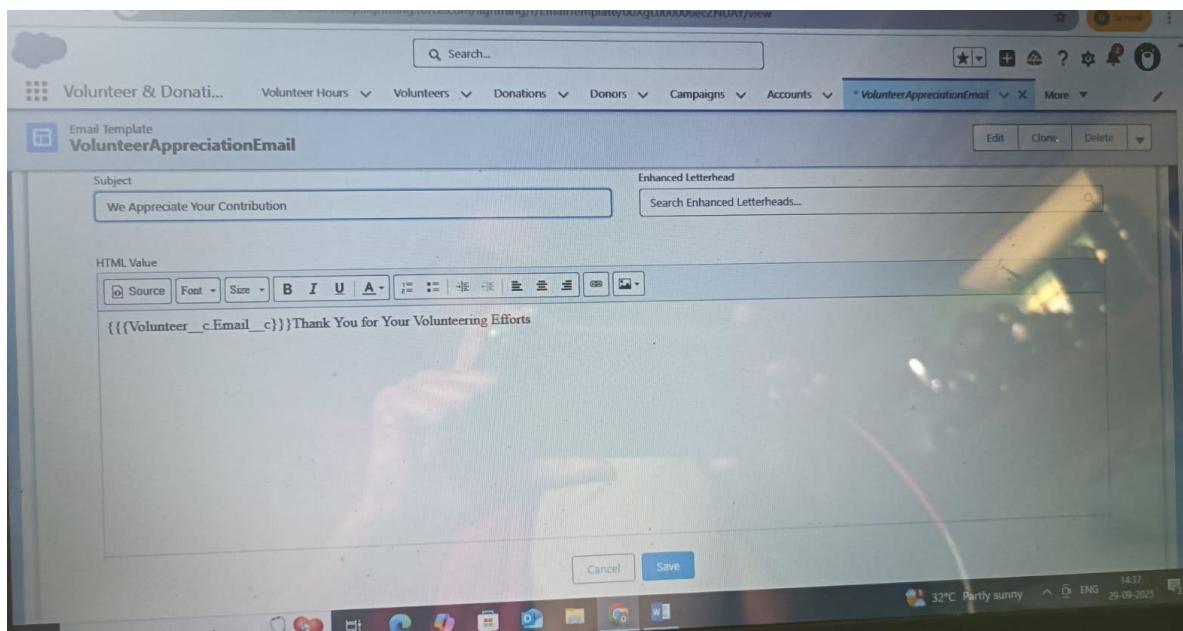
Type: HTML (with Merge Fields)

Object: Volunteer_c

Purpose

The **Monthly Volunteer Appreciation Email** is an automated process that sends a personalized thank-you message to each volunteer at the end of every month. This automation ensures that volunteers are **regularly recognized for their contributions**, regardless of whether they reached a milestone. It creates ongoing engagement and strengthens relationships between the nonprofit and its volunteer community.





Components

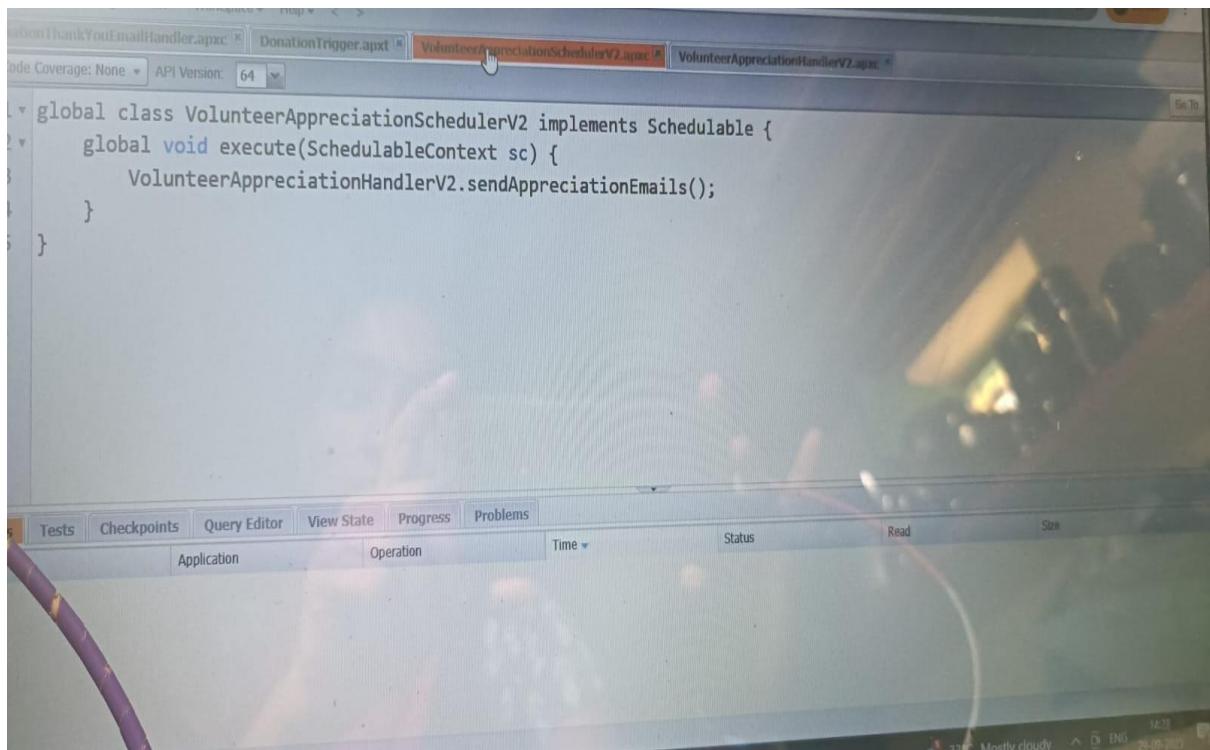
1. Email Template: Monthly Volunteer Appreciation

- Dynamic fields to personalize each email:
 - Volunteer Name (Volunteer_c.Name)
 - Hours Contributed in the Month
 $(\text{SUM}(\text{Volunteer_Hours_c.Hours_c}))$
 - Total Lifetime Hours (Volunteer_c.Total_Hours_c)
- Message highlights their monthly contribution and thanks them for their dedication.

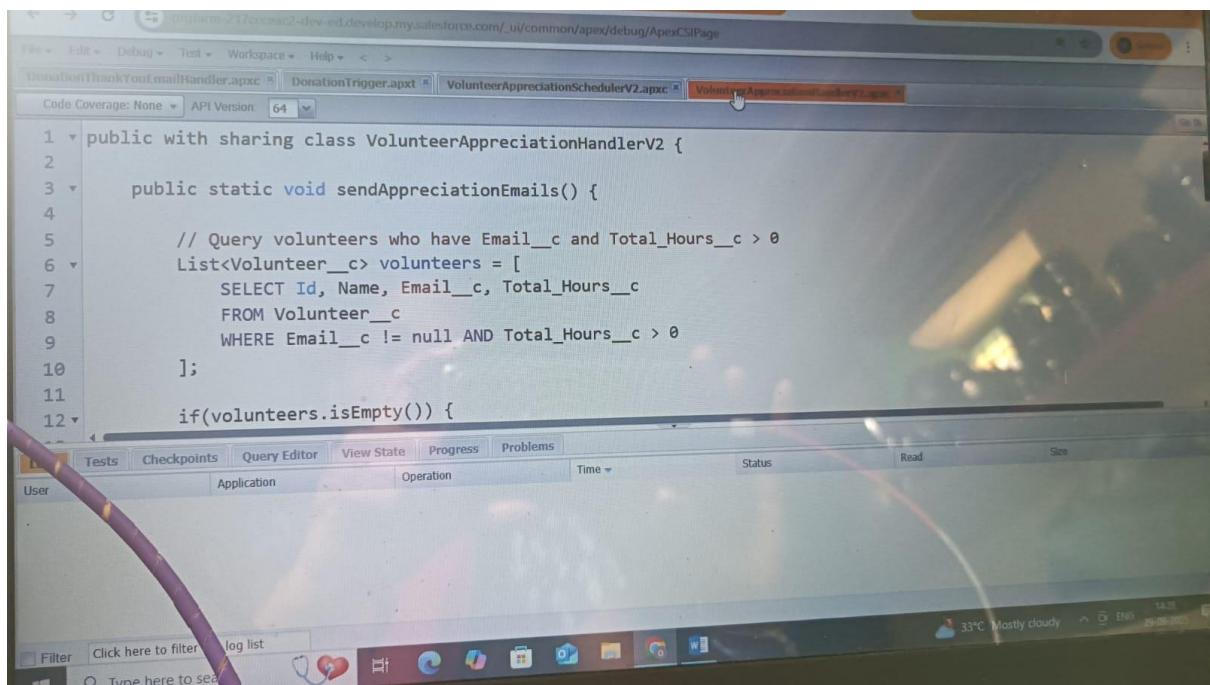
2. Scheduled Automation

Apex Scheduled Class (Developer):

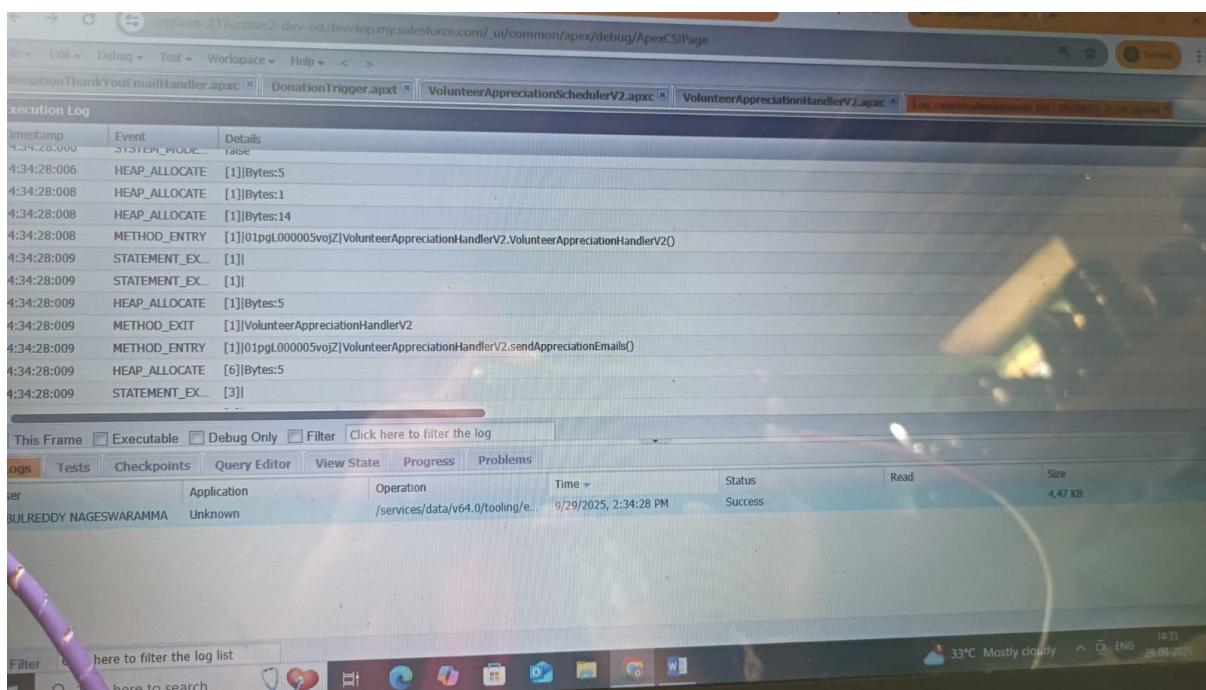
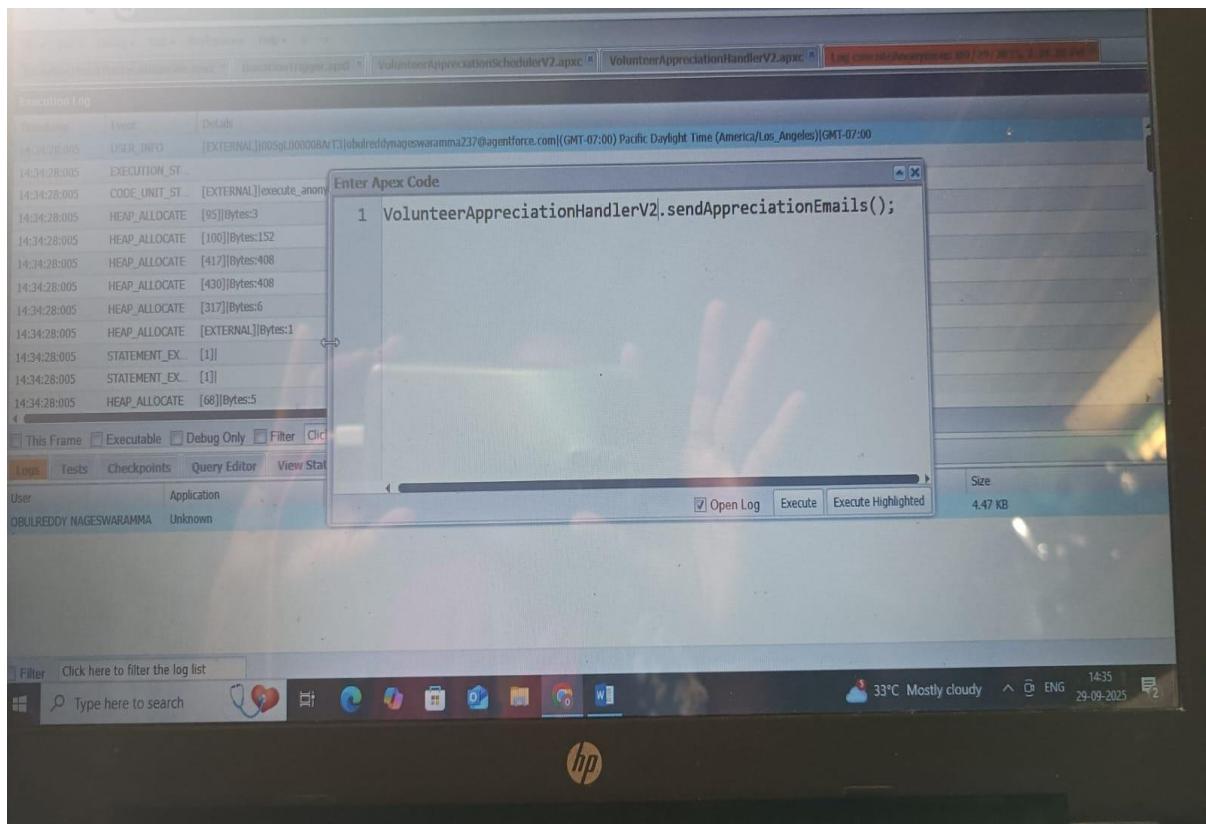
- Schedulable Apex Class runs monthly.
- Aggregates volunteer hours for the month.
- Sends appreciation emails automatically via `Messaging.SingleEmailMessage`.



```
global class VolunteerAppreciationSchedulerV2 implements Schedulable {  
    global void execute(SchedulableContext sc) {  
        VolunteerAppreciationHandlerV2.sendAppreciationEmails();  
    }  
}
```



```
1 public with sharing class VolunteerAppreciationHandlerV2 {  
2  
3     public static void sendAppreciationEmails() {  
4  
5         // Query volunteers who have Email_c and Total_Hours_c > 0  
6         List<Volunteer__c> volunteers = [  
7             SELECT Id, Name, Email__c, Total_Hours__c  
8             FROM Volunteer__c  
9             WHERE Email__c != null AND Total_Hours__c > 0  
10        ];  
11  
12        if(volunteers.isEmpty()) {
```



User Interface Development (VDMS):

Purpose

To create an intuitive and visually appealing **Lightning Experience interface** for Donors, Volunteers, and Administrators. The UI ensures easy navigation, quick access to records, and gamification features like **leaderboards**.

Key Deliverables

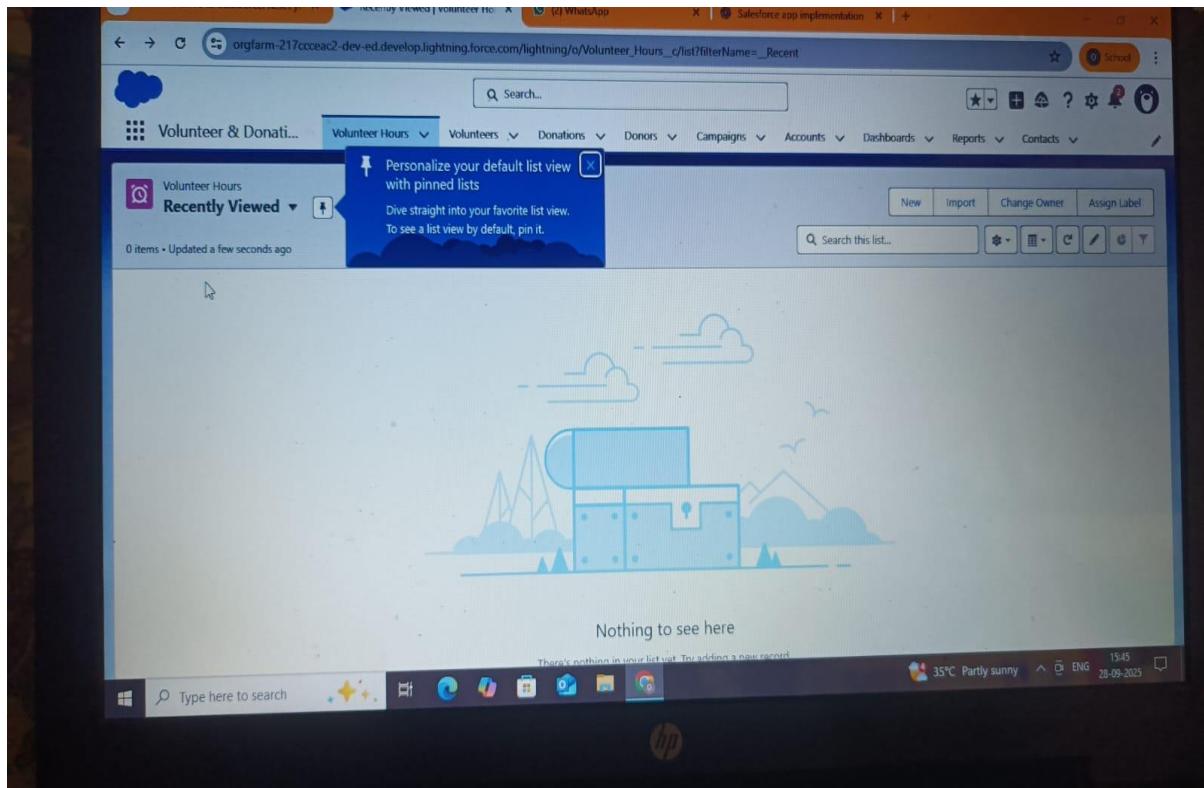
1. **Lightning App**
 - o App Name: *Volunteer & Donation Management*
 - o Navigation Items: Donors, Donations, Volunteers, Volunteer Hours, Campaigns, Reports, Dashboards
2. **Custom Tabs**
 - o Donor__c
 - o Donation__c
 - o Volunteer__c
 - o Volunteer_Hours__c
 - o Campaign__c
3. **Record Pages (Lightning App Builder)**
 - o **Donor Record Page:**
 - Donor details, related donations, thank-you email history
 - o **Donation Record Page:**
 - Donation amount, payment mode, status, related donor & campaign
 - o **Volunteer Record Page:**
 - Volunteer details, recognition badges, logged hours
 - o **Campaign Record Page:**
 - Campaign goals, donations received, volunteer participation, leaderboard component
4. **Home Page Layouts**
 - o **Admin Home Page:** Pending Donations, Top Campaigns, Key Reports
 - o **Volunteer Home Page:** Logged Hours, Leaderboard, Upcoming Campaigns
 - o **Donor Home Page:** Recent Donations, Thank-You Notes, Impact Reports
5. **Utility Bar**
 - o Notes
 - o Recent Records
 - o Chatter Feed
 - o Quick Add Donation / Volunteer Hours
6. **Lightning Web Components (LWC)**
 - o **Leaderboard Component:**
 - Top Donors by donation amount
 - Top Volunteers by hours contributed
 - o **Monthly Impact Dashboard:**
 - Displays donation trends per campaign
 - o **Quick Log Hours Form:**
 - Volunteers can log hours directly from Home Page

7. Navigation Service

- Enables smooth redirection from custom LWC to record pages.
-

Outcome

- Donors can see their donation history & impact reports.
 - Volunteers can track their hours and compare performance with peers.
 - Admins can monitor overall nonprofit performance in one dashboard.
-

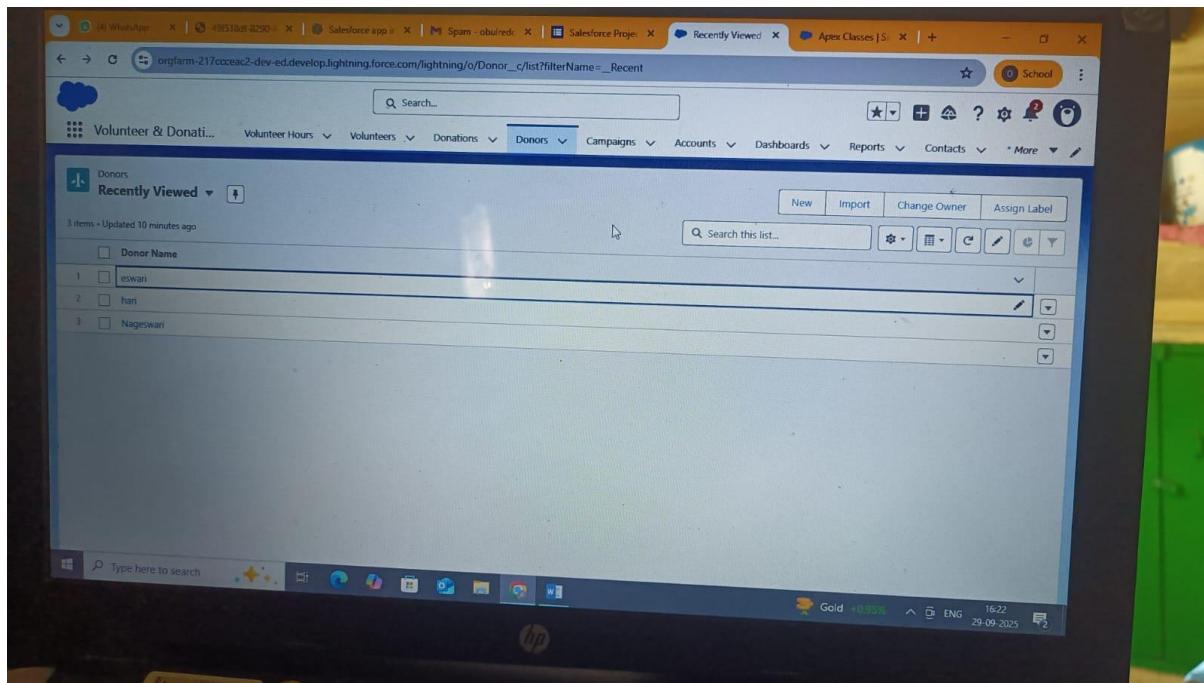
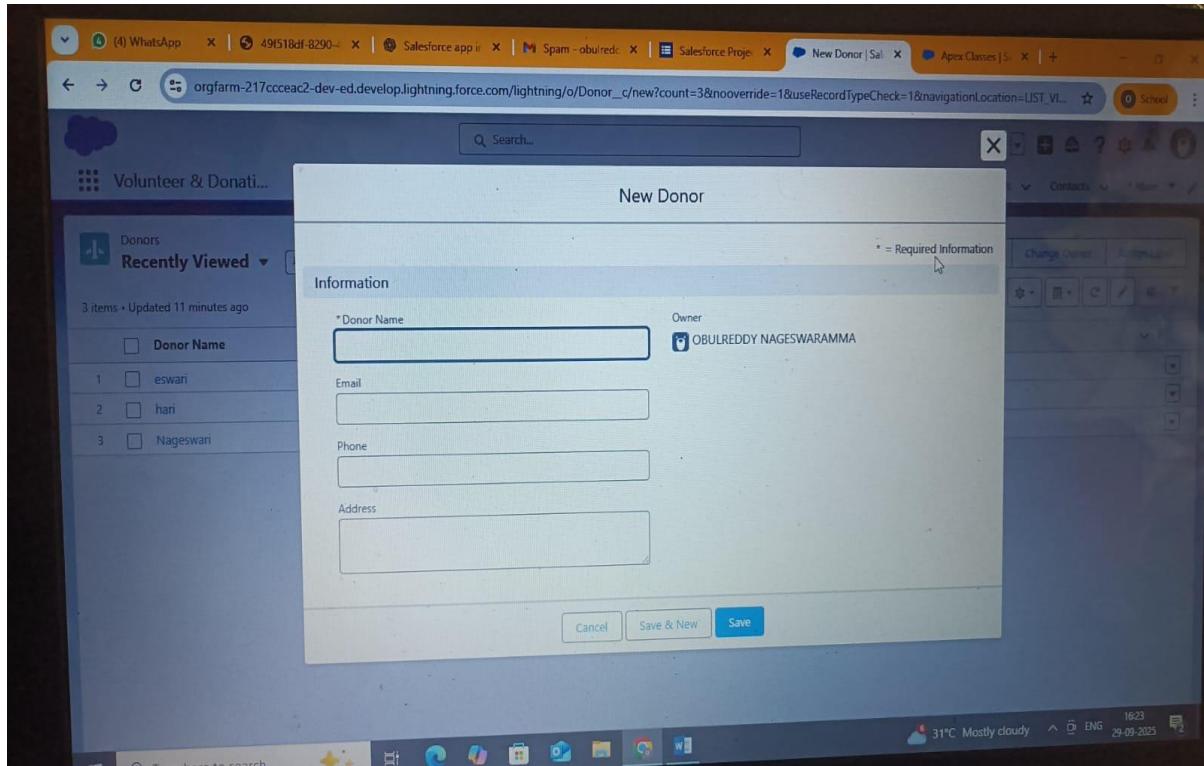


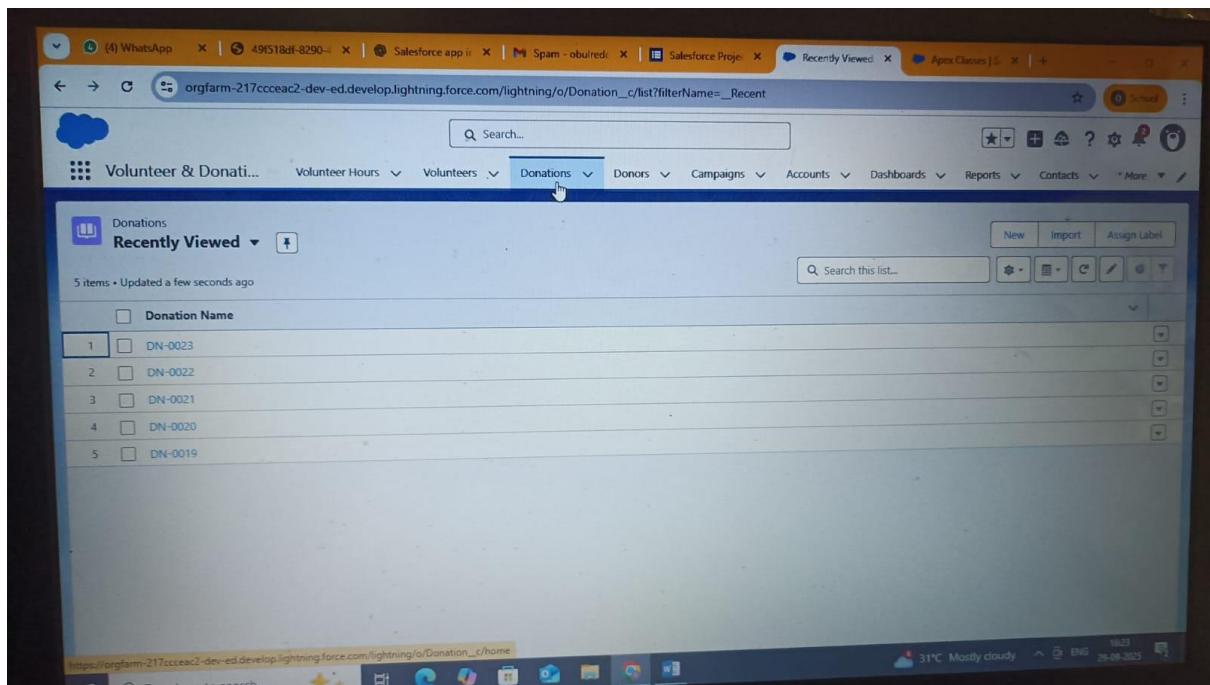
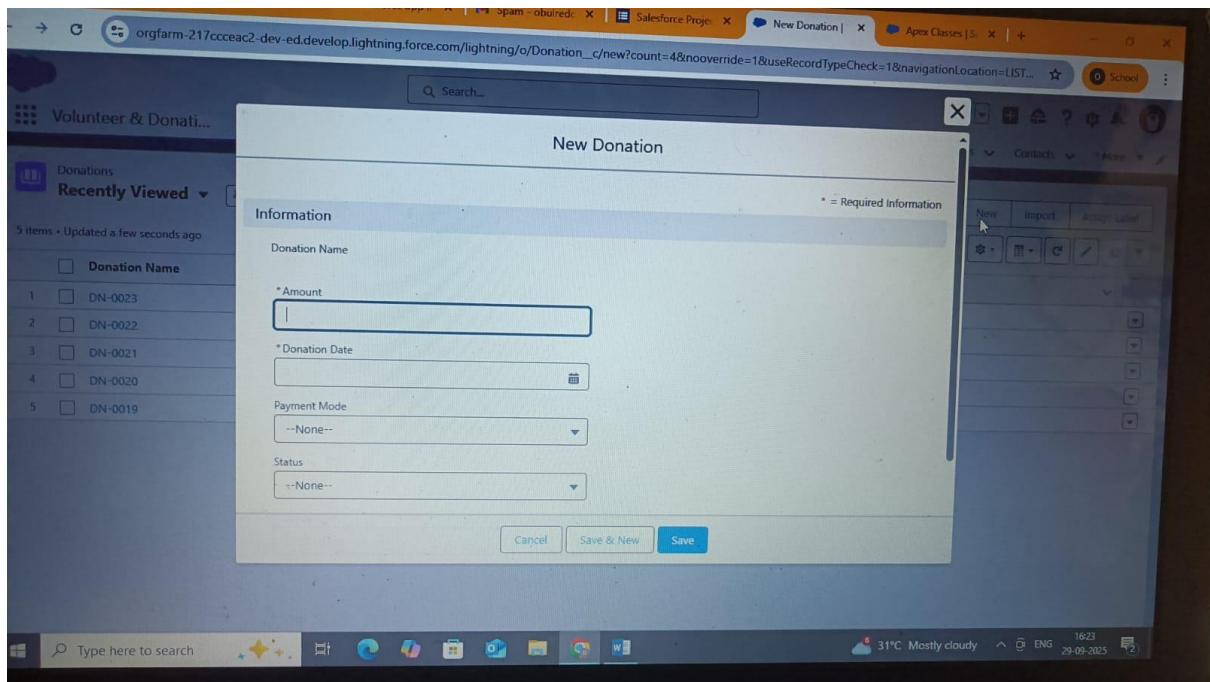
Integration & External Access

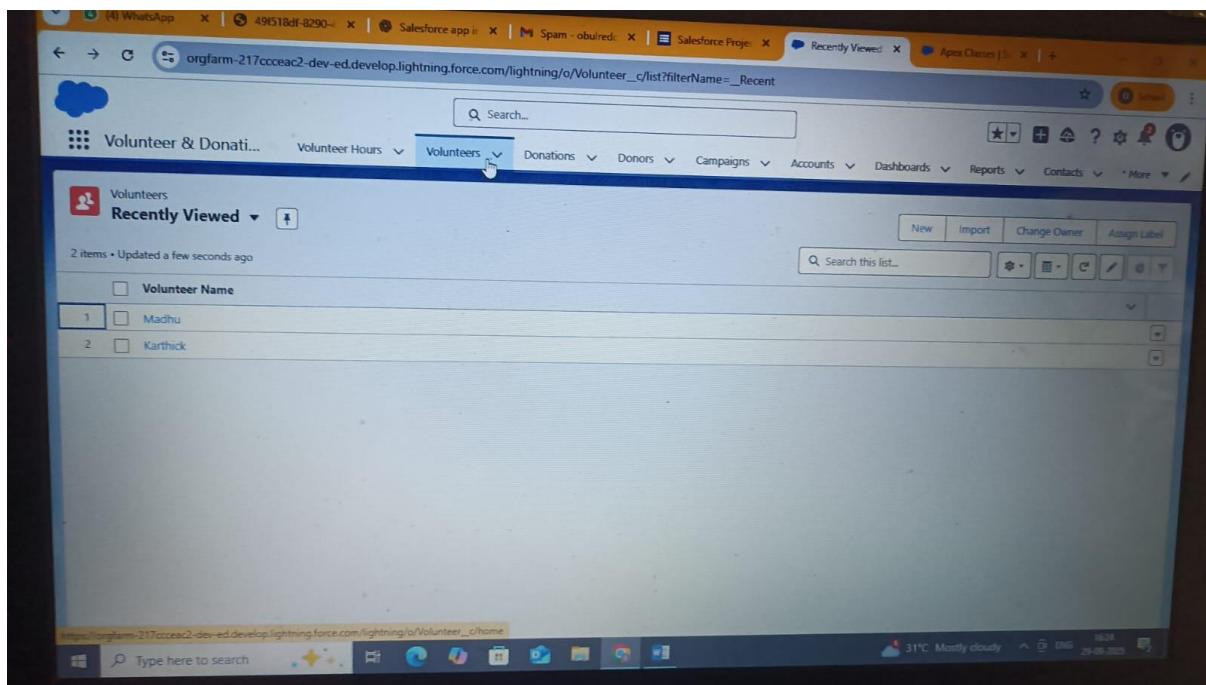
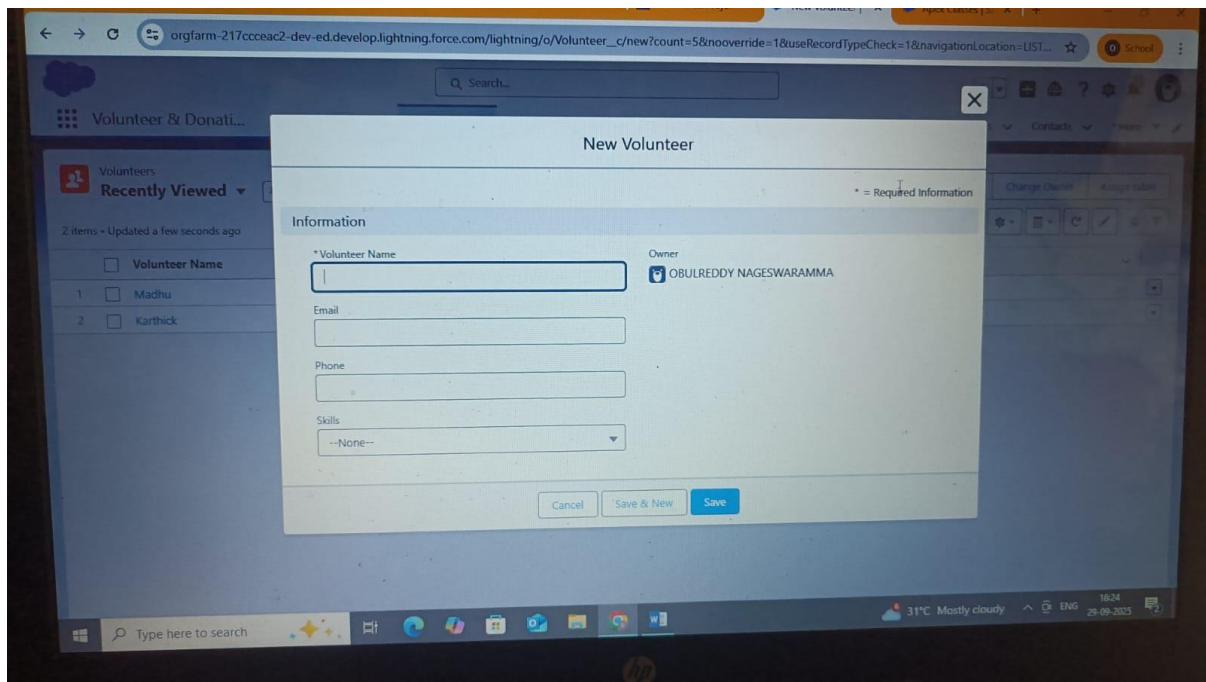
Purpose

To enable the Volunteer & Donation Management System (VDMS) to interact with **external applications, services, and stakeholders**. Integration ensures that data flows securely between Salesforce and third-party systems (like payment gateways, email marketing tools, or external databases).

CREATING ALL NEEDED RECORDS :







The image displays two screenshots of a Salesforce Lightning application interface.

Screenshot 1: New Volunteer Hours Form

This screenshot shows the "New Volunteer Hours" form. The form fields include:

- *Hours: A text input field containing "VH-0002".
- *Date: A date input field.
- Activity-Type: A dropdown menu set to "None".
- *Volunteer: A search bar with the placeholder "Search Volunteers...".

At the bottom of the form are three buttons: "Cancel", "Save & New", and "Save".

Screenshot 2: Volunteer Hours List View

This screenshot shows a list view of "Volunteer Hours". The list contains two items:

	Volunteer Hours Name
1	VH-0002
2	VH-0001

At the top of the list view, there are buttons for "New", "Import", and "Assign Label".

Both screenshots are taken from a Windows desktop environment, with the taskbar visible at the bottom showing various open applications like WhatsApp, Salesforce app, and a browser tab for "Apna Classes".

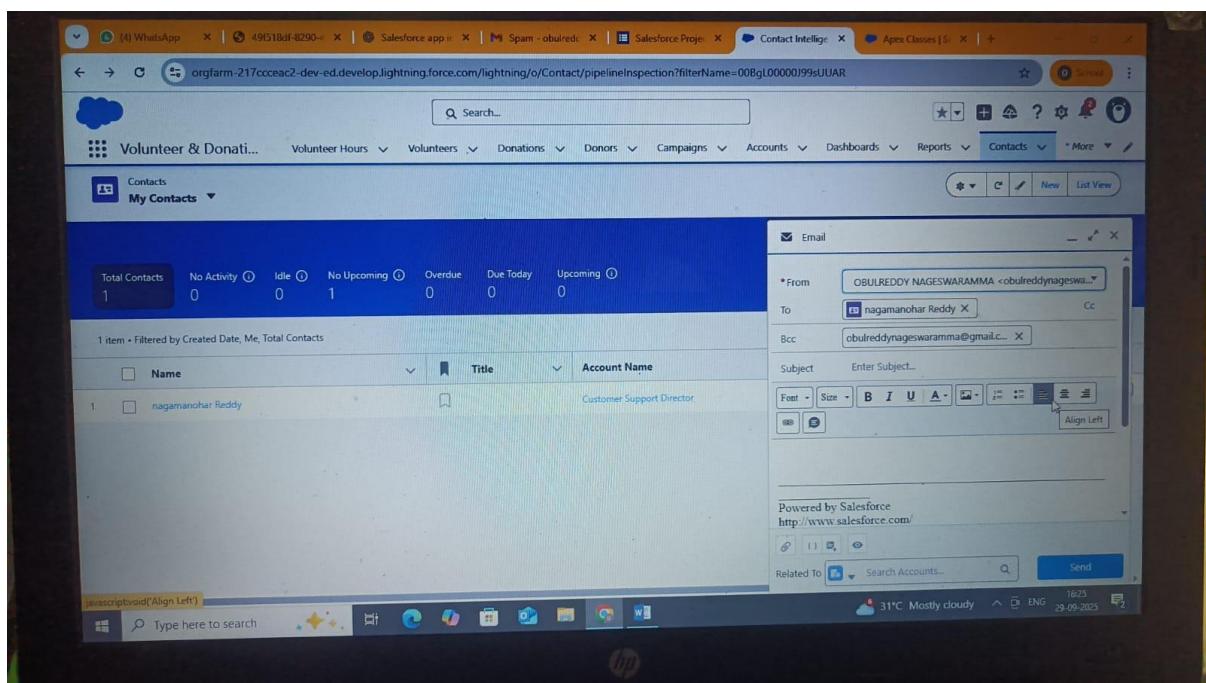
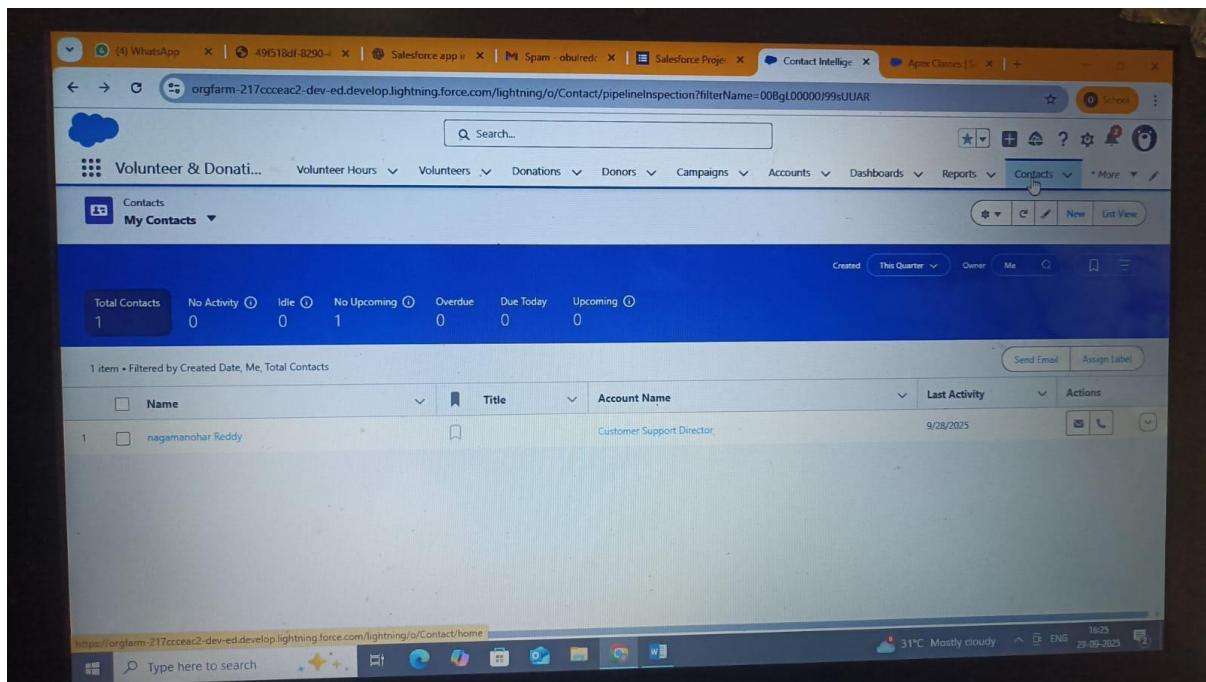
The screenshot shows the Salesforce Lightning interface for the Accounts list. The top navigation bar includes links for Volunteer Hours, Volunteers, Donations, Campaigns, Accounts, Dashboards, Reports, Contacts, and More. A search bar at the top right contains the placeholder "Search...". Below the navigation is a header with "Recently Viewed" and a "Search this list..." input field. The main content area displays a table with two rows of account data:

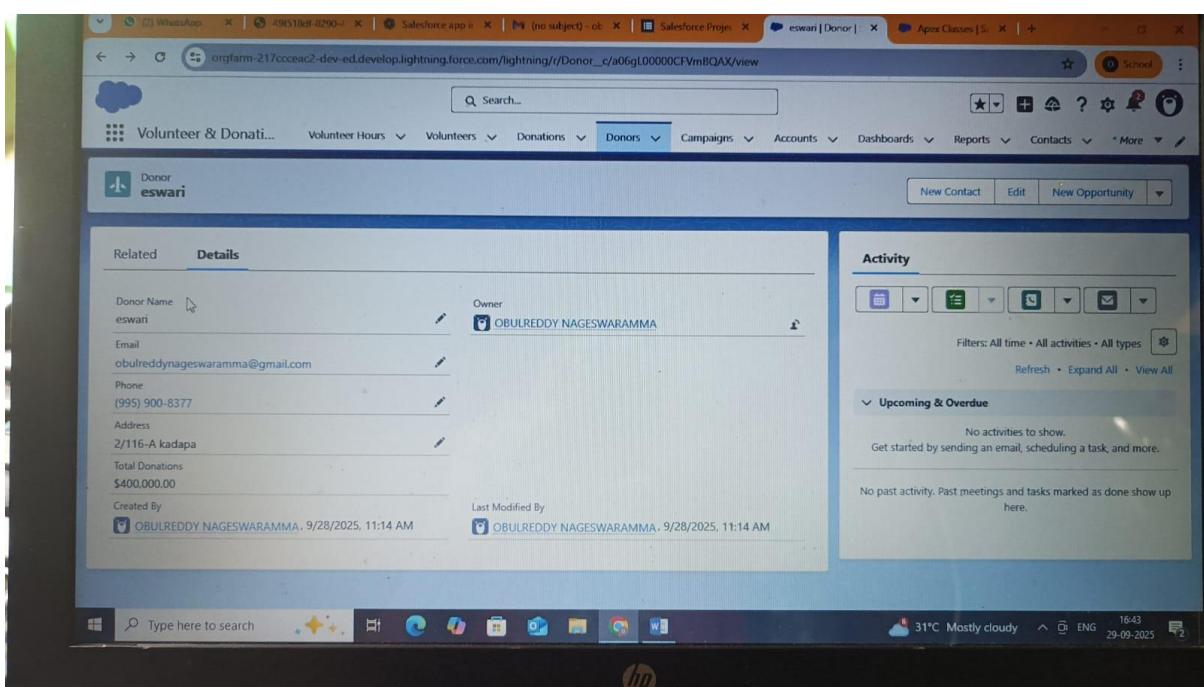
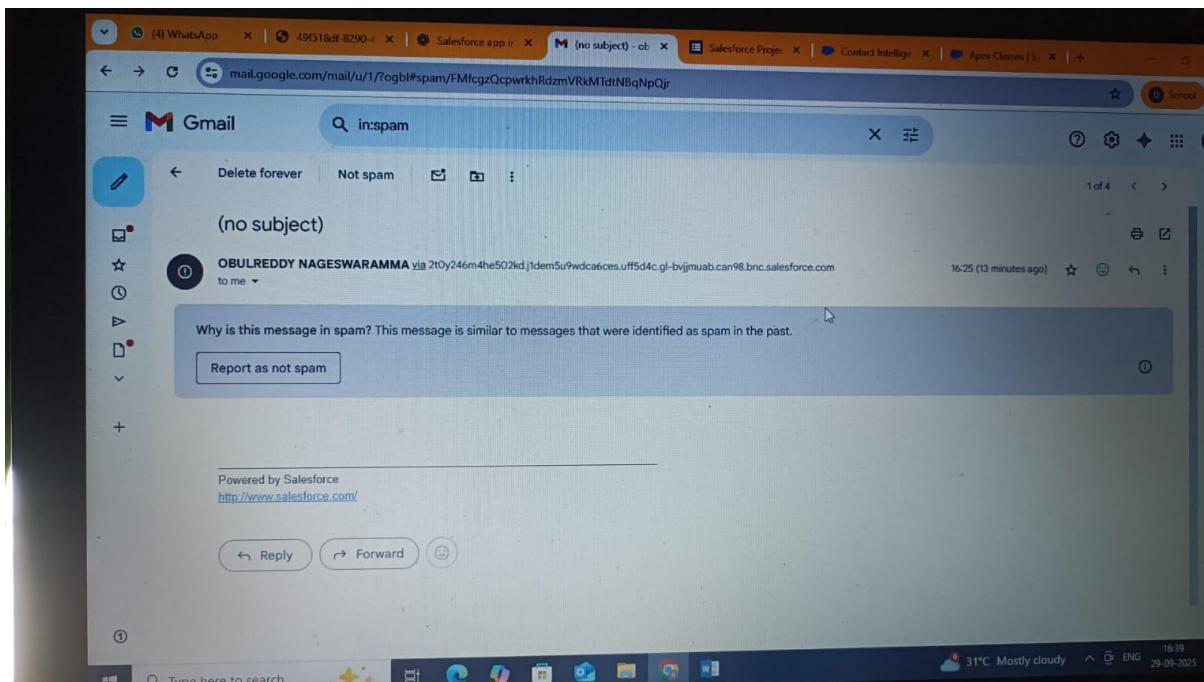
	Account Name	Account Site	Phone	Account Owner
1	Customer Support Director	kadapa	(336) 222-7000	obu
2	Accounts Receivable	kadapa	(336) 222-7000	obu

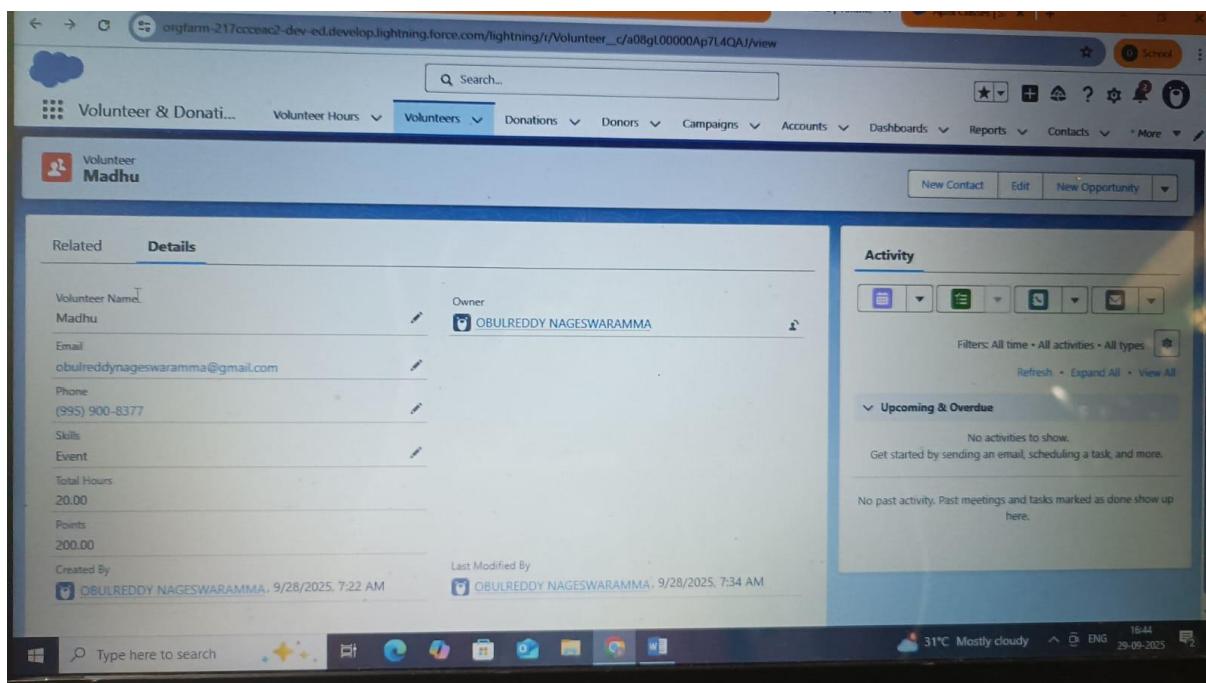
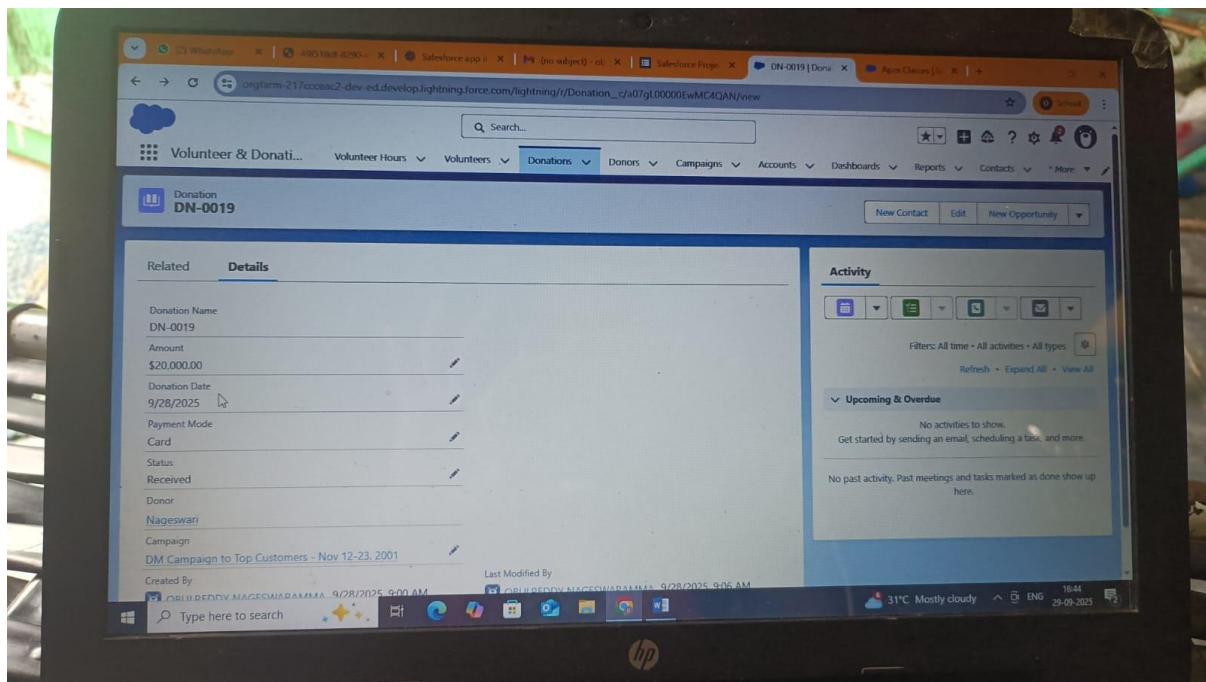
The screenshot shows the Salesforce Lightning interface for creating a new account. The top navigation bar includes links for Volunteer Hours, Volunteers, Donations, Campaigns, Accounts, Dashboards, Reports, Contacts, and More. A search bar at the top right contains the placeholder "Search...". The main content area is titled "New Account" and displays the "Account Information" section. Required fields are marked with an asterisk (*). The form fields include:

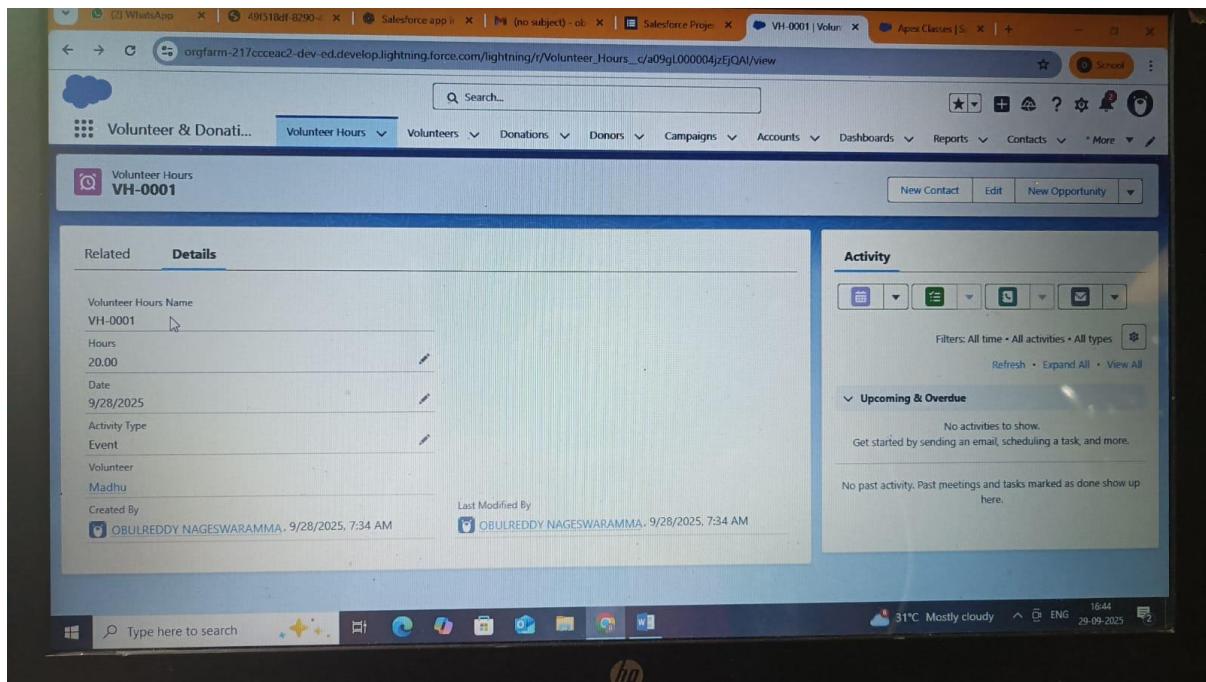
- Account Owner: OBULREDDY NAGESWARAMMA
- Rating: --None--
- *Account Name: (empty)
- Phone: (empty)
- Parent Account: Search Accounts...
- Fax: (empty)
- Account Number: (empty)
- Website: (empty)
- Account Site: (empty)
- Ticker Symbol: (empty)

At the bottom of the form are three buttons: "Cancel", "Save & New", and "Save".







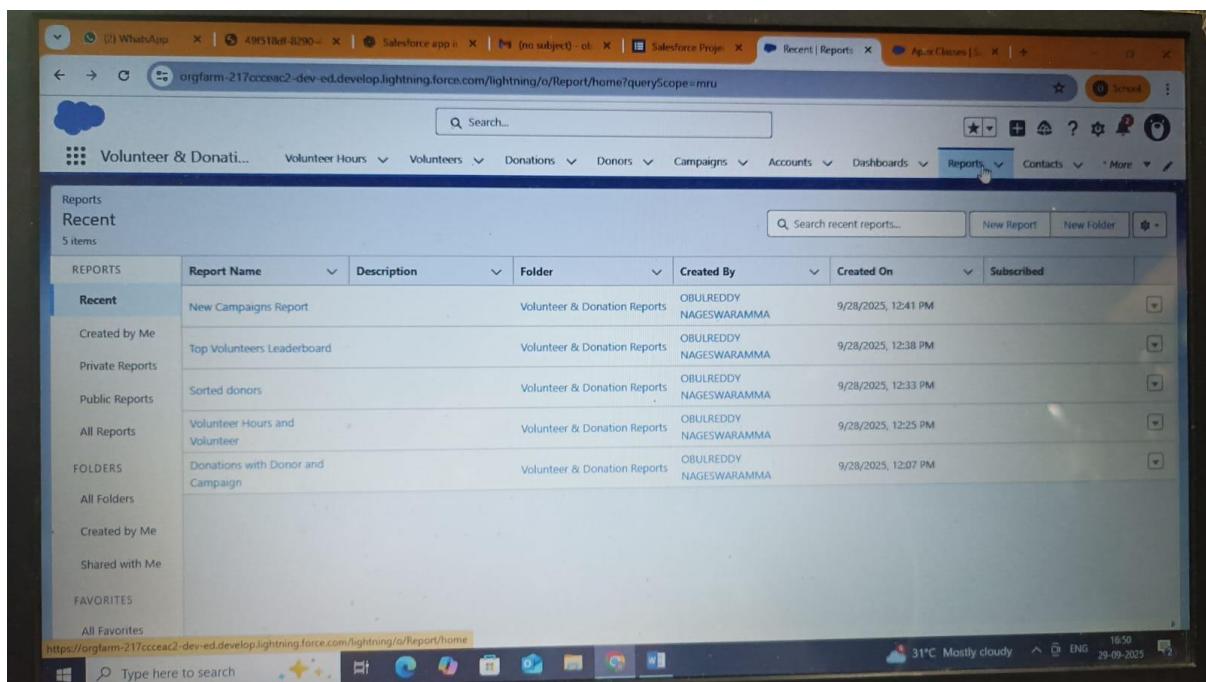


Reports & Dashboards:

Purpose

Reports and dashboards provide **insights into donor behavior, donations, campaigns, and volunteer efforts**. They help nonprofit administrators make data-driven decisions and track overall organizational impact.

In below I create some reports they are:



The screenshot shows the Salesforce Report Builder interface. The top navigation bar includes links for Sales, Contact Intelligence, Recently Viewed, Report Builder, Sales, and WhatsApp. The main title is "Volunteer & Donations". The report type is "REPORT" and the name is "New Campaigns Report". The report details section shows a preview of a limited number of records with the message: "Previewing a limited number of records. Run the report to see everything." The table columns are "Campaign Name", "Active", and "Start Date". The data rows are:

	Campaign Name	Active	Start Date
1	GC Product Webinar - Jan 7, 2002	<input checked="" type="checkbox"/>	2/27/2025
2	User Conference - Jun 17-19, 2002	<input checked="" type="checkbox"/>	8/7/2025
3	DM Campaign to Top Customers - Nov 12-23, 2001	<input checked="" type="checkbox"/>	1/2/2025
4	International Electrical Engineers Association Trade Show - Mar 4-5, 2002	<input checked="" type="checkbox"/>	4/24/2025
5			

On the left sidebar, under "Fields", there are sections for "Groups" (with "GROUP ROWS" selected) and "Columns" (listing "Campaign Name", "# Active", and "Start Date"). The bottom status bar shows the date as 29-09-2025.

The screenshot shows the Salesforce Report Builder interface. The top navigation bar includes links for Sales, Contact Intelligence, Recently Viewed, Report Builder, Sales, and WhatsApp. The main title is "Volunteer & Donations". The report type is "REPORT" and the name is "New Report". The report details section shows a preview of a limited number of records with the message: "Previewing a limited number of records. Run the report to see everything." The table columns are "Volunteer: Volunteer Name", "Volunteer Hours: Volunteer Hours Name", "Volunteer: Created Date", "Points", and "Total Hours". The data rows are:

	Volunteer: Volunteer Name	Volunteer Hours: Volunteer Hours Name	Volunteer: Created Date	Points	Total Hours
1	Madhu	VH-0001	9/29/2025	200.00	20.00
2	Karthick	VH-0002	9/23/2025	300.00	30.00
3				500.00	50.00

On the left sidebar, under "Fields", there are sections for "Groups" (with "GROUP ROWS" selected) and "Columns" (listing "Volunteer: Volunteer Name", "Volunteer Hours: Volunteer Hours Name", "Volunteer: Created Date", "# Points", and "# Total Hours"). The bottom status bar shows the date as 29-09-2025.

The screenshot shows the Salesforce Report Builder interface. The report title is "Volunteers with Volunteer Hours". The left sidebar shows "Fields" and "Filters". Under "Filters", there is a dropdown for "Volunteer: Volunteer Name" set to "VH-0001" and another for "Volunteer Hours: Volunteer Hours Name" set to "VH-0002". A note says "Previewing a limited number of records. Run the report to see everything." The main area displays a table with two rows:

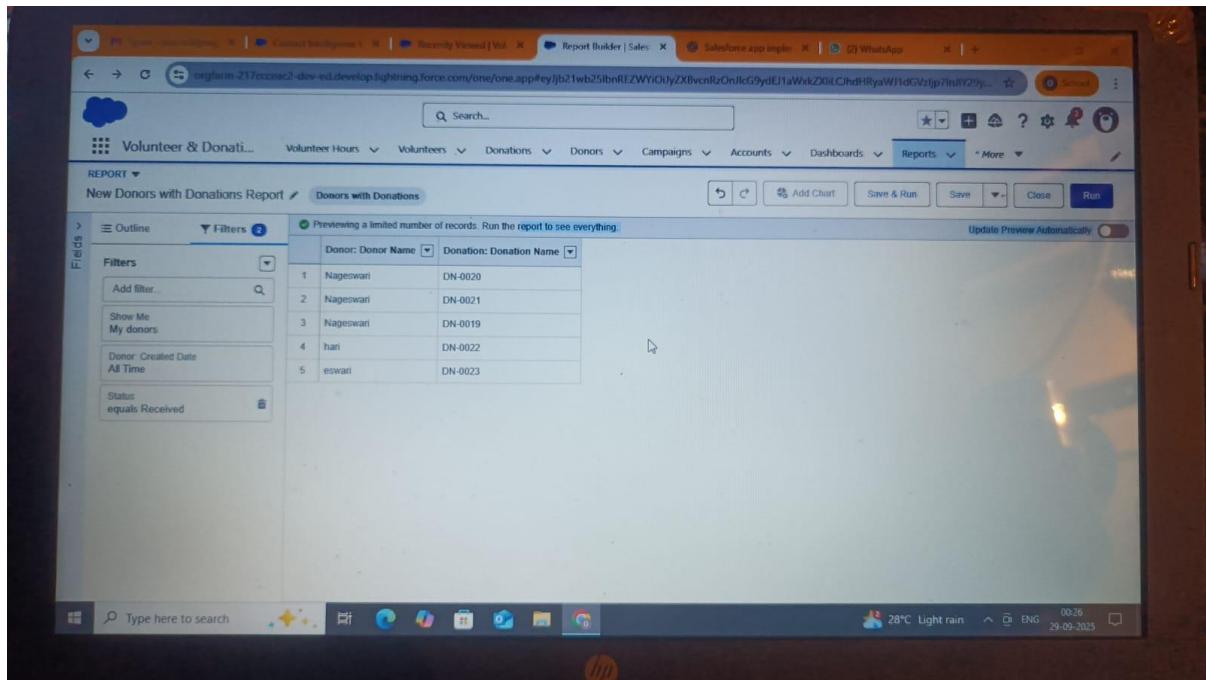
	Volunteer: Volunteer Name	Volunteer Hours: Volunteer Hours Name
1	Mathu	VH-0001
2	Karthick	VH-0002

The bottom status bar shows "28°C Light rain" and the date "29-09-2025".

The screenshot shows the Salesforce Report Builder interface. The report title is "Donors with Donations". The left sidebar shows "Fields" and "Groups". Under "Groups", there is a section for "GROUP ROWS" with an "Add group..." button. A note says "Previewing a limited number of records. Run the report to see everything." The main area displays a table with four rows:

	Donor: Donor Name	Donation: Donation Name	Amount	Donation Date	Campaign
1	eswar	DN-0023	\$400,000.00	9/28/2025	DM Campaign to Top Customers - Nov 12-23, 2001
2	hari	DN-0022	\$5,000.00	9/28/2025	DM Campaign to Top Customers - Nov 12-23, 2001
3	Nageewari	DN-0019	\$20,000.00	9/28/2025	DM Campaign to Top Customers - Nov 12-23, 2001
4			\$425,000.00		

The bottom status bar shows "28°C Light rain" and the date "29-09-2025".



Dashboard – Volunteer & Donation Management System (VDMS)

Purpose

Dashboards provide a **visual summary of key metrics** for donations, volunteers, and campaigns in real-time. They help administrators, campaign managers, donors, and volunteers understand trends, track goals, and make **data-driven decisions**.

Dashboards in Salesforce **combine multiple reports into one visual interface** using charts, tables, gauges, and other components.

1. Key Dashboards in VDMS

a. Donation Dashboard

Objective: Track overall donation performance and top contributors.

Components:

- **Total Donations (Gauge/Metric)**
 - Shows the total amount received in a period (monthly/quarterly/yearly).
- **Donations by Campaign (Pie/Bar Chart)**
 - Visual representation of contributions per campaign.
- **Monthly Donation Trends (Line/Bar Chart)**
 - Tracks donations over time to identify growth trends.
- **Top 5 Donors (Table)**

- Lists highest contributors for recognition.
-

b. Volunteer Dashboard

Objective: Monitor volunteer engagement and hours.

Components:

- **Total Volunteer Hours (Gauge/Metric)**
 - Displays cumulative hours logged by all volunteers.
 - **Volunteer Participation by Campaign (Pie/Donut Chart)**
 - Shows how volunteers are distributed across campaigns.
 - **Top Volunteers (Table)**
 - Lists volunteers with highest hours contributed for recognition/leaderboards.
 - **Monthly Volunteer Hours Trend (Bar/Line Chart)**
 - Tracks volunteer activity over time.
-

c. Campaign Dashboard

Objective: Evaluate campaign success and engagement.

Components:

- **Campaign Goal vs Actual Donations (Bar/Stacked Chart)**
 - Shows fundraising targets vs actual donations for each campaign.
 - **Donor Participation by Campaign (Pie Chart)**
 - Indicates number of donors supporting each campaign.
 - **Volunteer Hours by Campaign (Stacked Bar Chart)**
 - Highlights volunteer contribution per campaign.
-

2. Dashboard Features

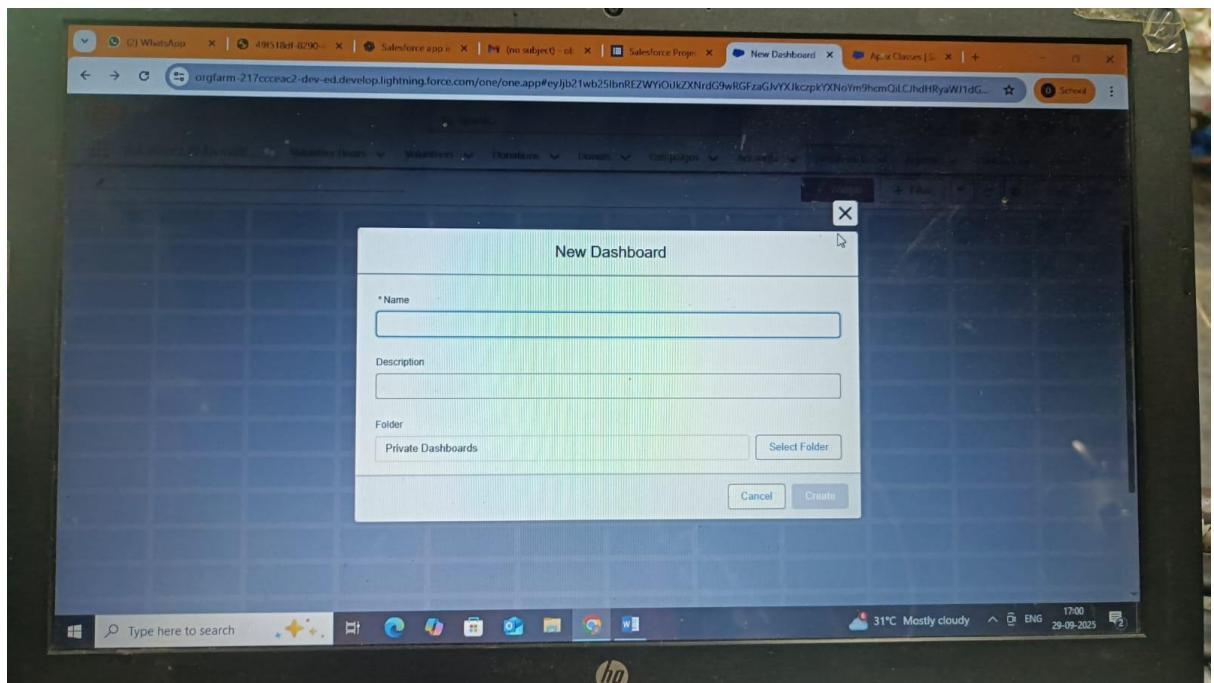
- **Dynamic Dashboards:**
 - Show role-based metrics; admins see full data, coordinators see only their campaigns, donors/volunteers see only their contributions.
 - **Real-Time Updates:**
 - Dashboards refresh automatically as data changes in Salesforce.
 - **Interactive Components:**
 - Users can click on charts/tables to drill down into underlying reports.
 - **Visual KPI Tracking:**
 - Gauges, bar charts, and metrics highlight critical success factors.
-

3. Benefits

- **Instant Insights:** Quick overview of donations, volunteers, and campaigns.
 - **Improved Decision-Making:** Identify high-performing campaigns and areas needing attention.
 - **Engagement & Motivation:** Leaderboards encourage donors and volunteers to participate more.
 - **Professional Reporting:** Easy for presentations, board meetings, and stakeholder updates.
-

4. Outcome

- A **centralized visual interface** that summarizes all key nonprofit performance metrics.
- Supports **gamification and recognition programs** for donors and volunteers.
- Helps administrators **track fundraising targets and volunteer engagement** effectively.



The screenshot shows a Salesforce interface with a sidebar on the left containing categories like DASHBOARDS, FOLDERS, and FAVORITES. The main area displays a table of recent dashboards:

DASHBOARD	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Volunteer & Donation Dashboard	Volunteer & Donation Dashboards	OBULREDDY NAGESWARAMMA	OBULREDDY NAGESWARAMMA	9/28/2025, 12:50 PM	
Created by Me	Volunteer & Donation Dashboard	Volunteer & Donation Dashboards	OBULREDDY NAGESWARAMMA	OBULREDDY NAGESWARAMMA	9/28/2025, 12:43 PM	
Private Dashboards						
All Dashboards						

At the bottom of the screen, the Windows taskbar is visible with icons for various applications.

The screenshot shows a Salesforce dashboard titled "Volunteer & Donation Dashboard". The main area is a large, empty grid with a light blue background, likely where widgets would be placed. The top navigation bar includes links for Volunteer Hours, Volunteers, Donations, Donors, Campaigns, Accounts, Dashboards, Reports, Contacts, and More. The Windows taskbar is visible at the bottom.

Screenshot of the Salesforce Lightning interface showing the "Volunteer & Donation Dashboard".

The dashboard displays a table titled "Donations with Donor and Campaign" containing the following data:

Donor	Donation ID	Amount	Date	Campaign
eswari	DN-0023	\$400	9/28/2025	DM Campaign to Top Customers - Nov 12-23, 2001
hari	DN-0022	\$5.00	9/28/2025	DM Campaign to Top Customers - Nov 12-23, 2001
Nageswaran	DN-0019	\$20.00	9/28/2025	DM Campaign to Top Customers - Nov 12-23, 2001

Below the table, there are two report links:

- [View Report \(Donations with Donor\)](#) (As of Sep 28, 2025, 12:56 PM)
- [View Report \(New Campaigns Report\)](#) (As of Sep 28, 2025, 12:56 PM)

The system status bar at the bottom shows: 31°C Mostly cloudy, ENG, 17:01, 29-09-2025.

Screenshot of the Salesforce Lightning interface showing the "Volunteer & Donation Dashboard".

The dashboard displays a table titled "New Campaigns Report" containing the following data:

Campaign Name	Action	Start Date
DM Campaign to Top Customers - Nov 12-23, 2001	<input checked="" type="checkbox"/>	1/2/2025
GC Product Webinar - Jan 7, 2002	<input checked="" type="checkbox"/>	2/27/2025
International Electrical Engineers Association Trade Show - Mar 4-5, 2002	<input checked="" type="checkbox"/>	4/24/2025
User Conference - Jun 17-19, 2002	<input checked="" type="checkbox"/>	8/7/2025

Below the table, there are two report links:

- [View Report \(Donations with Donor\)](#) (As of Sep 28, 2025, 12:56 PM)
- [View Report \(New Campaigns Report\)](#) (As of Sep 28, 2025, 12:56 PM)

The system status bar at the bottom shows: 31°C Mostly cloudy, ENG, 17:01, 29-09-2025.

The screenshot shows a Salesforce Lightning interface with a dark blue background. At the top, there's a navigation bar with various tabs like Volunteer Hours, Volunteers, Donations, etc. Below the navigation bar, a sidebar displays a "Top Volunteers Leaderboard" report. The report table has three columns: Volunteer Name, Total Hours, and Points. Two rows are listed: Karthick (30.00 hours, 300.00 points) and Madhu (20.00 hours, 200.00 points). The report is dated As of Sep 28, 2025, 12:56 PM.

Volunteer: Volunteer Name ↑	Total Hours	Points
Karthick	30.00	300.00
Madhu	20.00	200.00

This screenshot shows the same Salesforce Lightning interface. It displays a "Sorted donors" report. The report table has two columns: Donor Name and Total Donations. Three rows are listed: eswari (\$400.00k), hari (\$5.00k), and Nageswari (\$8.05M). The report is dated As of Sep 28, 2025, 12:56 PM.

Donor: Donor Name ↑	Total Donations
eswari	\$400.00k
hari	\$5.00k
Nageswari	\$8.05M

Screenshot of a Salesforce Lightning interface showing a dashboard and a report.

The dashboard header includes:

- (c) WhatsApp
- 496518eff-f290...
- Salesforce app
- (no subject) - ob...
- Salesforce Project
- Volunteer & Donor
- Active Classes

The main dashboard area displays two summary cards:

- Volunteer Hours: \$5.00K
- Donations: \$8.05M

Below the cards, a link "View Report (Sorted donors)" is shown, along with the timestamp "As of Sep 28, 2025, 12:56 PM".

A modal window titled "Donations with Donor and Campaign" is open, listing three donations:

Donor...	Donation...	A...	D...	Campaign
Nageswari	DN-0023	\$400	9/28/	DM Campaign to Top Customers - Nov 12-23, 2001
hari	DN-0022	\$5.00	9/28/	DM Campaign to Top Customers - Nov 12-23, 2001
Nageswari	DN-0019	\$20.00	9/28/	DM Campaign to Top Customers - Nov 12-23, 2001

The modal also shows a timestamp "As of Sep 28, 2025, 12:56 PM".

The system status bar at the bottom right shows:

- 31°C Mostly cloudy
- 17:01
- ENG
- 29-09-2025