# Solution Design Document (SDD) for IGTBOK Salesforce Implementation

## Introduction

The Solution Design Document (SDD) provides a detailed description of the proposed Salesforce solution to address the requirements identified in the Report of Findings (ROF) for IGTBOK. This document covers the following key aspects:

1. Org Setup
2. Objects and relationships
3. Record types
4. Custom objects
5. Security model
6. License types
7. Tasks and Activities configuration
8. Automation methods
9. External processes and integrations
10. Data loading and mapping

## Org Setup

**Company details:** IGTBOK, a non-profit organization providing emotional support and resources for human trafficking victims.

**Currency:** USD, as the organization operates primarily in the United States.

**IP restrictions:** Specific IP ranges will be determined based on the organization's security policies to restrict access to authorized users only.

## Objects and Relationships

**Standard Objects:** Account, Contact, Lead, Opportunity, Task, and Event

**Custom Objects:** Donation, Inventory

**Relationships:**

1. **Account to Contact (one-to-many):** Each account can have multiple contacts, representing both victims and donors.
2. **Account to Donation (one-to-many):** Each donor account can have multiple donations.
3. **Account to Inventory (one-to-many):** Each inventory item is associated with a specific account (either donor or victim).

## Record Types

**Account:**

1. **Victim:** For tracking information about human trafficking victims.
2. **Donor:** For tracking information about donors contributing to the organization.

**Opportunity:** Represents different sources of opportunities, such as Website, Phone, and Law Enforcement.

**Custom objects:** Donation and Inventory will have unique record types to differentiate various donation types and inventory items.

## Custom Objects and Reasons

**Donation:** To track donations received from donors, including the amount, date, donor information, and the allocation of donations to victims.

**Inventory:** To track the inventory of donations, such as goods or services, and their allocation to victims.

## Security Model

**Object-Level Security:**

1. **Account:** Private, ensuring that only users with the appropriate permissions can access account records.
2. **Contact:** Controlled by Parent, inheriting access settings from the parent Account object.
3. **Lead:** Private, providing access to authorized users only.
4. **Opportunity:** Private, allowing access to users with the necessary permissions.
5. **Custom objects:** Donation (Private), Inventory (Private), both accessible by authorized users only.

## License Types

Salesforce Nonprofit Success Pack (NPSP) licenses will be utilized, as the organization already has 10 licenses. This package provides customized functionalities for non-profit organizations, including donor, fundraising, and volunteer management.

## Tasks and Activities Configuration

Configure tasks and activities for case managers to track victim progress and follow-ups, ensuring timely updates and proper resource allocation.

## Process Implementation and Automation Methods

### Process 1: Lead Management

**Automation method: Process Builder**

**Details:**

1. Automate the intake form process for victims, streamlining the data collection process.
2. Create tasks for case managers to provide necessary support and resources to victims.
3. Update lead status based on the victim's progress, ensuring accurate tracking and reporting.

### Process 2: Donation Management

**Automation method: Workflow Rule**

**Details:**

1. Automatically send tax receipts to donors upon receiving a donation, ensuring compliance with tax regulations.
2. Update the inventory of donations based on incoming donations, maintaining an accurate record of available resources.

## External Processes and Integrations

1. Integration with the organization's website for web-to-lead form submission, enabling seamless lead capture from online sources.
2. Integration with the phone system for logging incoming calls as opportunities, ensuring all potential leads are tracked and managed effectively.
3. Integration with third-party accounting software, streamlining the organization's financial processes and ensuring accurate financial reporting.

## Data Loading and Mapping

Data loading: Salesforce Data Loader will be used to import existing data into Salesforce, ensuring a smooth transition from the organization's current system.

**Object mappings:**

1. **Victim data:** Imported into the Account object (record type: Victim) and Contact object.
2. **Donor data:** Imported into the Account object (record type: Donor) and Contact object.
3. **Donation data:** Imported into the custom Donation object, with relationships to the corresponding donor account.
4. **Inventory data:** Imported into the custom Inventory object, with relationships to the associated donor or victim account.

In conclusion, this Solution Design Document (SDD) outlines the proposed Salesforce solution to address the requirements identified in the Report of Findings (ROF) for IGTBOK. The solution leverages Salesforce's robust features and capabilities, including custom objects, security models, process automation, and integrations, to enhance IGTBOK's ability to manage and support victims of human trafficking, track donations, and report on their progress to donors.