Project: NGO DONOR & VOLUNTEER CRM

Phase 2: Organization & Setup Configuration

Problem Statement:

NGOs face challenges in managing donors, tracking donations, and coordinating volunteers effectively. Manual processes such as spreadsheets or paper-based records cause delays, errors, and lack of transparency. This results in poor donor follow-up, inconsistent volunteer engagement, and limited insights for directors and managers.

The NGO Donor & Volunteer CRM aims to overcome these issues by providing a Salesforce-based application that:

- Centralizes donor, donation, volunteer, and event records.

- Automates acknowledgments and high-value donation approvals.

- Improves volunteer assignment and event coordination.

- Offers dashboards and reports for real-time decision-making.

Salesforce Edition & Environment Setup:

- **Edition:** Salesforce Developer Edition

- **Instance:** CAN96

- **Purpose:** Development environment dedicated to building and testing the *Hope Foundation NGO CRM system*.
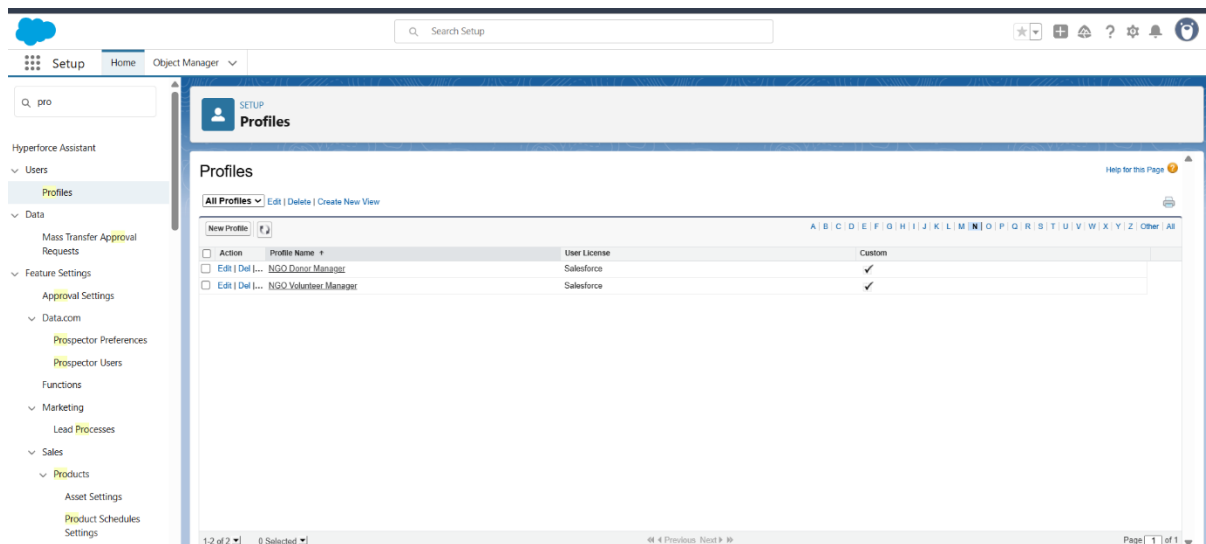
Company Profile Configuration:

- **Organization Name:** Hope Foundation NGO

- **Industry:** Non-Profit Organization

- **Primary Contact:** System Administrator

- **Default Locale:** Hindi (India)

- **Default Language:** English

- **Default Time Zone:** (GMT +5:30) Asia/Kolkata

- **Currency:** Indian Rupee (INR)

NGO Role Hierarchy Setup:

Role Structure:

CEO (Top Level)

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└── NGO Director

|

├── Donor Manager

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└── Volunteer Manager

Responsibilities:

- **NGO Director:** Approves major donations, monitors reports, overall system oversight.

- **Donor Manager:** Manages donor relationships, tracks donations, donor communication.

- **Volunteer Manager:** Coordinates volunteer programs, manages events, volunteer engagement.

User Profiles Created:

- NGO Donor Manager

- NGO Volunteer Manager

Business Hours Configuration:

- **Operating Hours:**

  o Monday – Friday: 9:00 AM – 6:00 PM

  o Saturday: 10:00 AM – 2:00 PM

  o Sunday: Closed

Purpose: Ensures that automated workflows, escalation rules, and time-dependent processes respect NGO business timings.

Holidays:

- January 1 – New Year

- August 15 – Independence Day

- December 25 – Christmas

User License Management:

- **Salesforce Platform Licenses:** Allocated to NGO staff.

- **Community Licenses:** Reserved for future Volunteer Portal access.

- **System Administrator License:** For IT and CRM management.

Security Foundation:

- **Organization-Wide Defaults (OWD):** Set to *Private* for custom objects (Donor, Volunteer, Donation).

- **Role Hierarchy:** Configured to allow record visibility based on roles.

- **Sharing Rules:** Role-based sharing model applied, ensuring secure but collaborative data access.

Development Setup:

- **Current Environment:** Developer Edition Org

- **Deployment Method:** Change Sets (for future production deployment)

- **Backup Strategy:** Weekly data exports during development phase