

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:

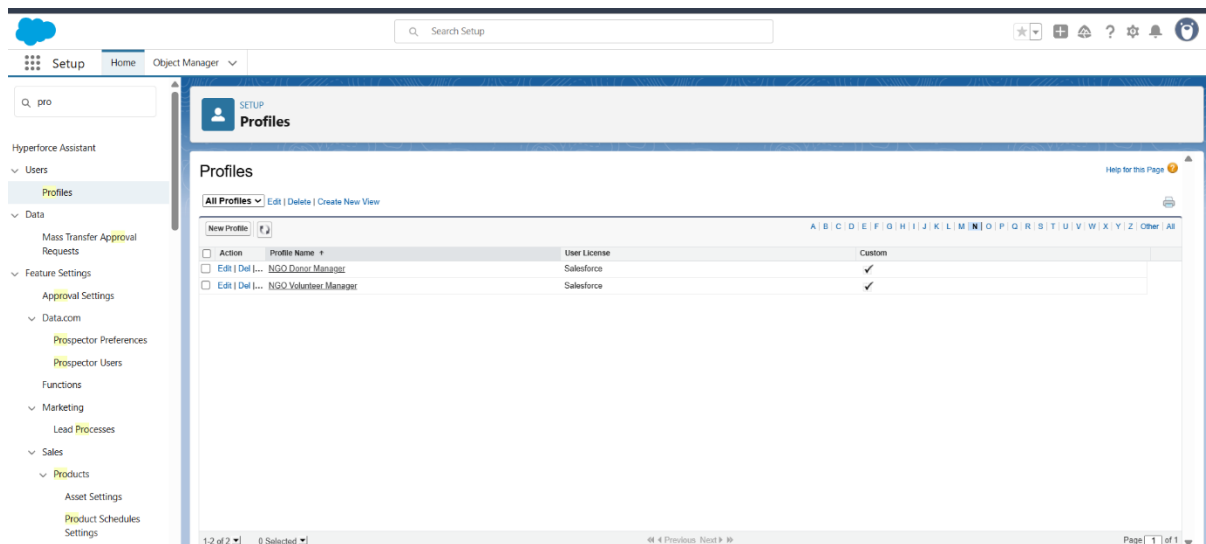
- **Organization Name:** Hope Foundation NGO
- **Industry:** Non-Profit Organization
- **Primary Contact:** System Administrator
- **Default Locale:** Hindi (India)
- **Default Language:** English
- **Default Time Zone:** (GMT +5:30) Asia/Kolkata
- **Currency:** Indian Rupee (INR)

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:**
 - Monday – Friday: 9:00 AM – 6:00 PM
 - Saturday: 10:00 AM – 2:00 PM
 - Sunday: Closed

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

The screenshot shows the Salesforce Setup interface for configuring Business Hours. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. Under 'Company Settings', 'Business Hours' is selected. The main content area is titled 'Organization Business Hours' and includes a description: 'Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate. If you enter blank business hours for a day, that means your organization does not operate on that day.' Below this is a 'Business Hours Detail' section with an 'Edit' button. It features a table for 'Standard NGO Business Hours' with columns for 'Business Hours Name', 'Standard NGO Business Hours', and 'Time Zone'. The table lists days from Sunday to Saturday with their respective business hours (e.g., Sunday 9:00 AM to 6:00 PM). Below the table are fields for 'Active' (checkbox), 'Created By' (sudestina.pendyala 9/24/2025, 1:33 PM), and 'Last Modified By' (sudestina.pendyala 9/24/2025, 1:33 PM). At the bottom, there is a 'Holidays' section with an 'Add/Remove' button and a message 'No records to display'.

Holidays:

- January 1 – New Year
- August 15 – Independence Day
- December 25 – Christmas

The screenshot shows the Salesforce Setup interface for configuring Holidays. The left sidebar is the same as the previous screenshot, with 'Holidays' selected under 'Company Settings'. The main content area is titled 'Holidays' and includes a description: 'Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.' Below this is a 'Holidays' section with a 'New' button and a table. The table has columns for 'Action', 'Holiday Name', 'Description', and 'Date and Time'. It lists three holidays: 'Christmas Day' (12/25/2025 All Day), 'Independence Day' (8/15/2026 All Day), and 'New Year's Day' (1/1/2026 All Day). Below the table is an 'Elapsed Holidays' section with a message 'No records to display'.

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