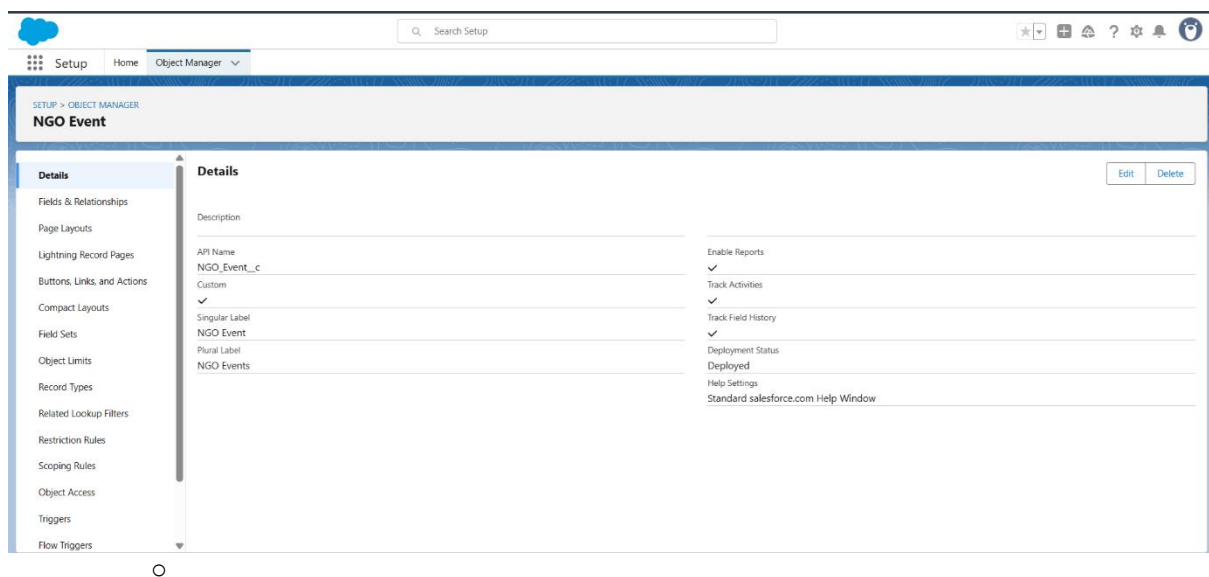# NGO Donor & Volunteer CRM

Phase 3: Data Modelling & Relationships

3.1 Standard & Custom Objects:

- **Standard Objects Used:**

    - **Contact** → Represents Donors (reuse instead of custom Donor object).

- **Custom Objects Created:**

    - **Donation** – Tracks contributions from donors.

    - **Volunteer** – Stores volunteer details.

    - **NGO Event** – Represents NGO events (fundraisers, camps, drives).

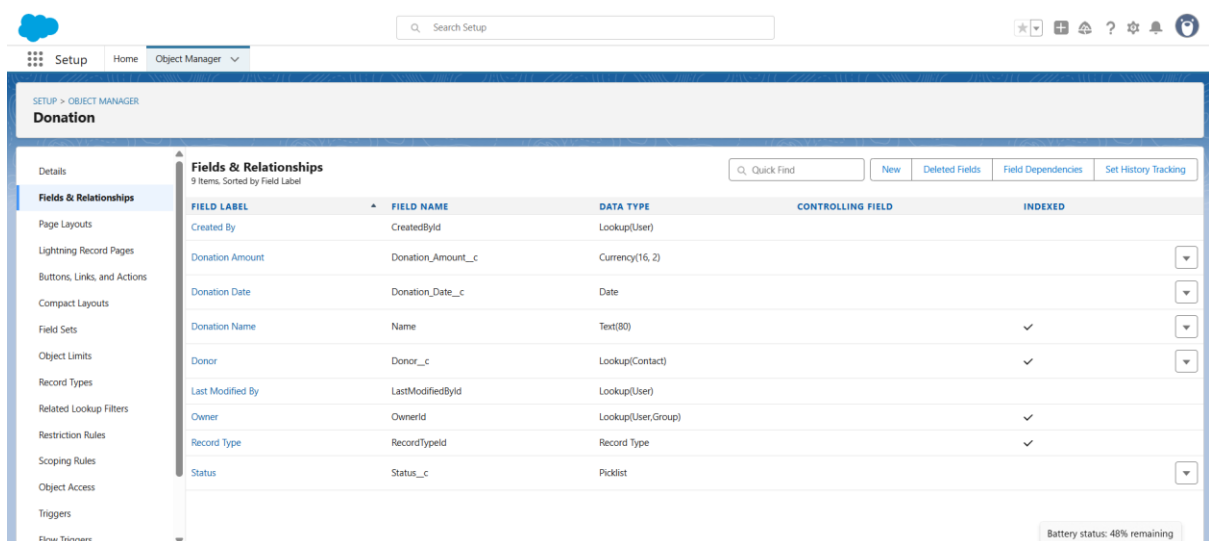   - **Volunteer Assignment (Junction Object)** – Connects Volunteers ↔ Events (many-to-many relationship).

○

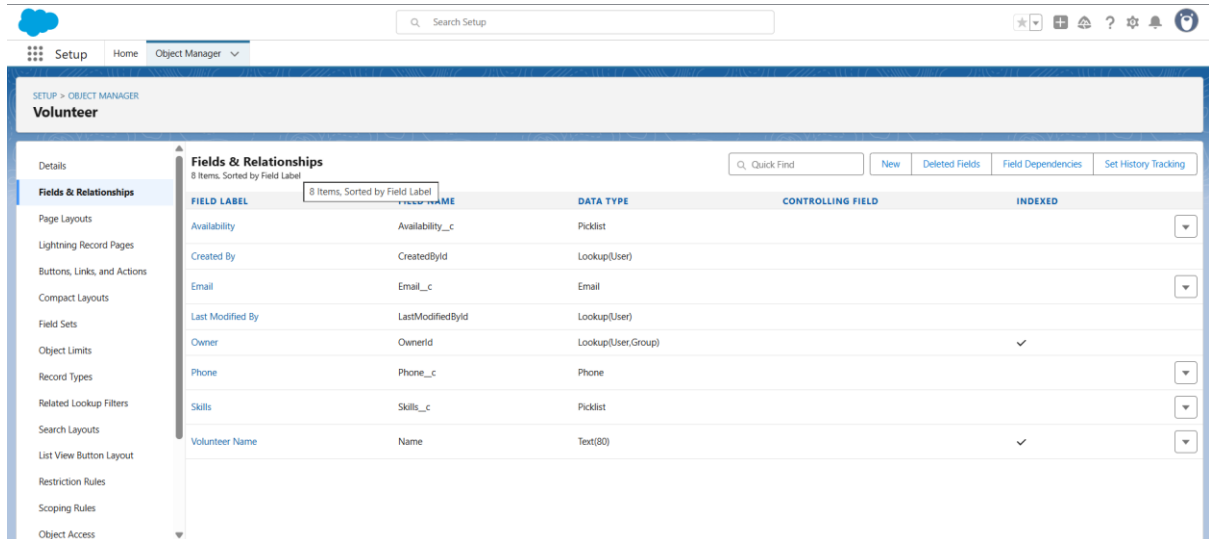---

3.2 Fields:

- **Donation Fields:**

  - Donation Amount (Currency)

  - Donation Date (Date)

  - Status (Picklist: Pending, Received, Acknowledged, Approved, Rejected)

  - Donor (Lookup to Contact)

  - Event (Lookup to NGO Event)

- **Volunteer Fields:**

  - Email (Email)

- o   Phone (Phone)

- o   Skills (Picklist: Teaching, Fundraising, Admin, Technical, Other)

- o   Availability (Picklist: Weekdays, Weekends, Full-time, Part-time)
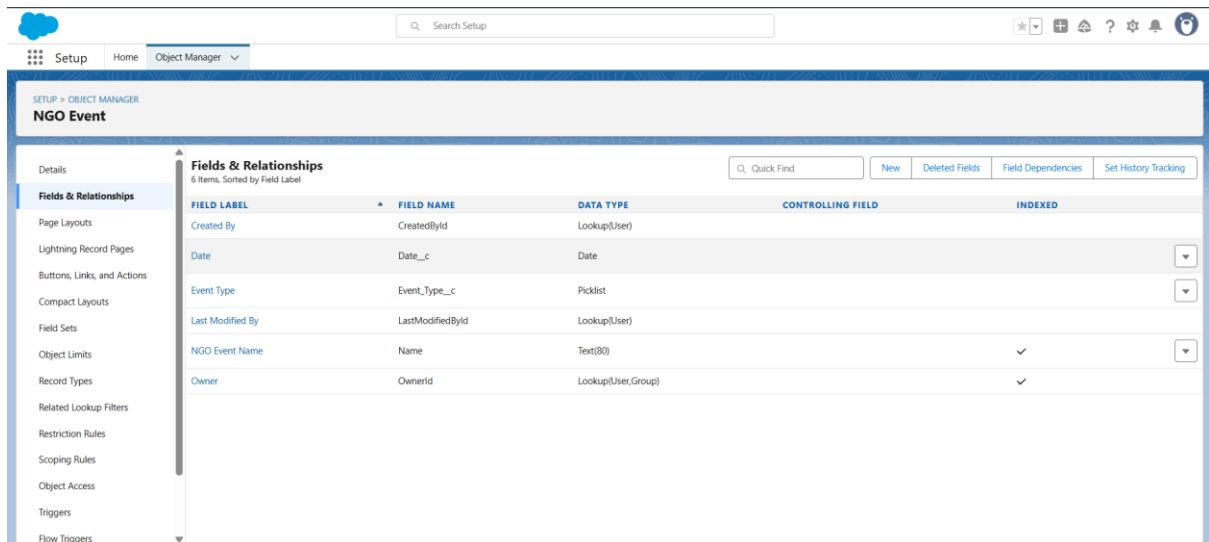
- o   Event (Lookup to NGO Event)

- **NGO Event Fields:**

  - o   Event Name (Text)

  - o   Event Date (Date)

  - o   Event Type (Picklist: Fundraiser, Camp, Drive, etc.)

- **Volunteer Assignment Fields (Junction Object):**

  - o   Volunteer (Lookup to Volunteer)

  - o   Event (Lookup to NGO Event)

3.3 Record Types:

- Created **Donation Record Types** to categorize contributions:

    1. **Monetary Donation** – Cash, check, or online contributions.

    2. **In-Kind Donation** – Goods, services, or volunteer time contributions.

3.4 Page Layouts:

- **Donation Page Layout:**

    o Top Section: Donation Name, Donor, Status.

    o Middle Section: Donation Amount, Donation Date.

    o Bottom Section: Custom fields.

- **Volunteer Page Layout:**
  - Includes Email, Phone, Skills, Availability, Assigned Event.

3.5 Compact Layouts:

- Created a **Donation Compact Layout** with fields:
  - Donation Name
  - Donor
  - Donation Amount
  - Status

3.6 Relationships:

- **Donation → Contact** (Lookup) → Links donor with contribution.

- **Donation → NGO Event** (Lookup) → Links donations to events.

- **Volunteer → NGO Event** (Lookup) → Volunteers assigned to events.

- **Volunteer Assignment → Volunteer & Event** → Many-to-many link between volunteers and events.

3.7 Schema Builder (Visual Data Model)

- Opened Schema Builder to visualize object relationships.

- Displayed **Contact, Donation, Volunteer, NGO Event, Volunteer Assignment** with connecting lines.