

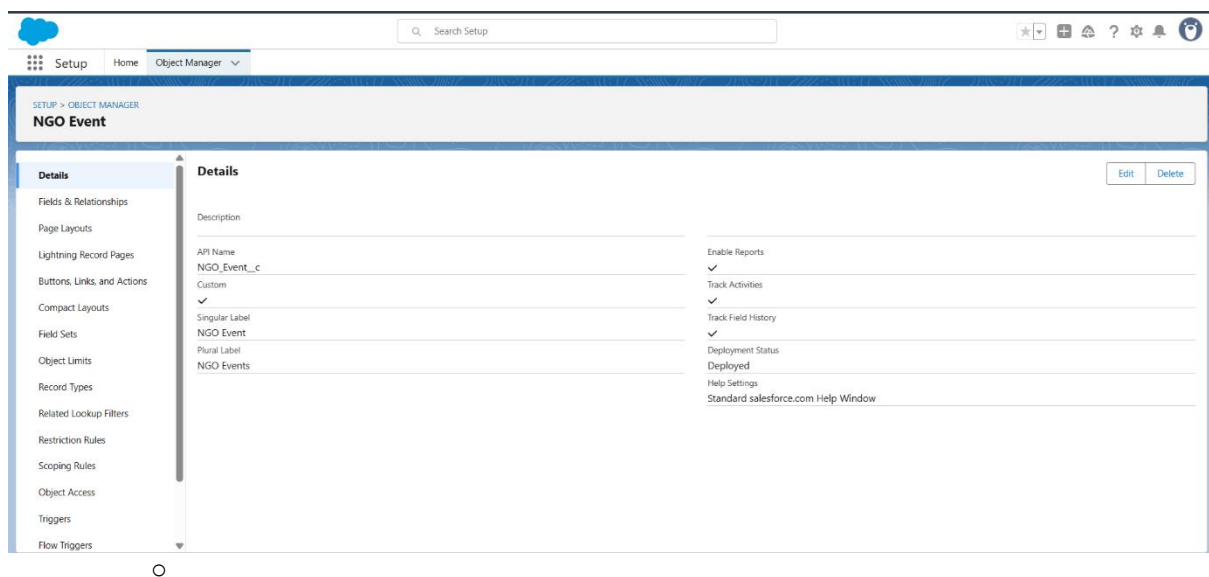
NGO Donor & Volunteer CRM

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).

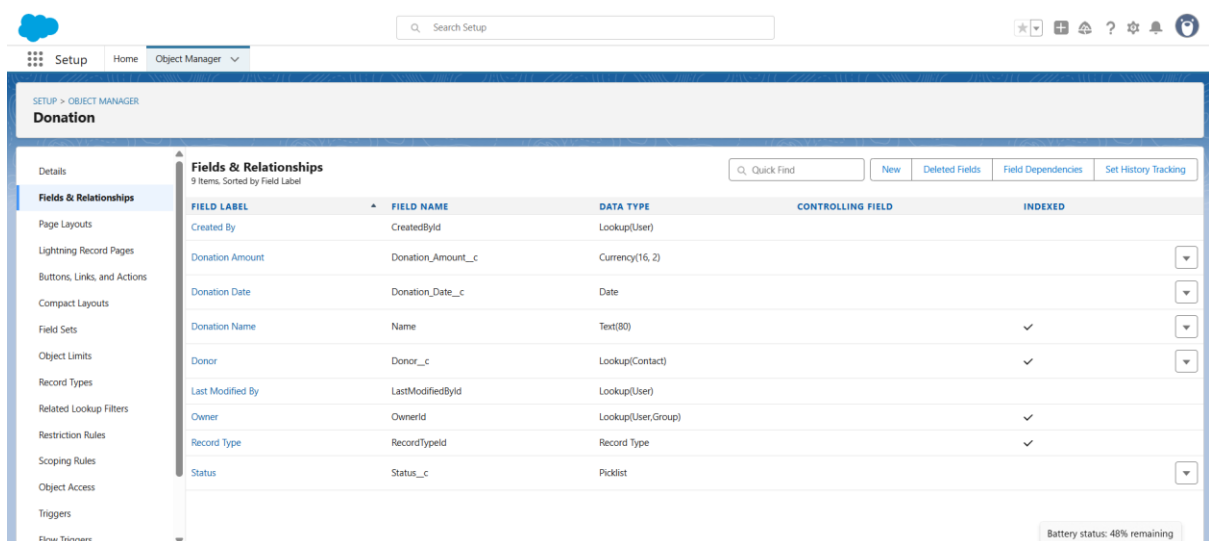
The image displays two screenshots of the Salesforce Setup interface. The top screenshot shows the 'New Custom Object' page, where the 'Volunteer' object is being defined. The 'Custom Object Information' section includes fields for Label (Volunteer), Plural Label (Volunteers), and Object Name (Volunteer). The bottom screenshot shows the 'Volunteer Assignment' page, which is a junction object. It features a left-hand navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', and 'Triggers'. The main content area shows the 'Details' tab, including the API Name (Volunteer_Assignment__c), Singular Label (Volunteer Assignment), Plural Label (Volunteer Assignments), and a list of settings such as 'Enable Reports', 'Track Activities', and 'Track Field History'.



3.2 Fields:

- **Donation Fields:**

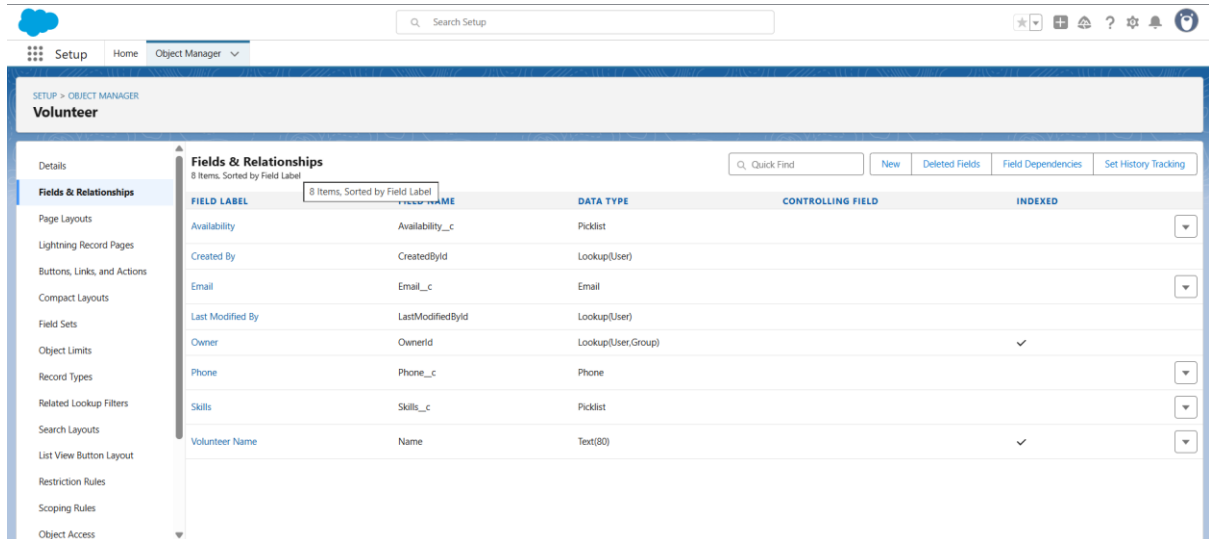
- Donation Amount (Currency)
- Donation Date (Date)
- Status (Picklist: Pending, Received, Acknowledged, Approved, Rejected)
- Donor (Lookup to Contact)
- Event (Lookup to NGO Event)



- **Volunteer Fields:**

- Email (Email)

- Phone (Phone)
- Skills (Picklist: Teaching, Fundraising, Admin, Technical, Other)
- Availability (Picklist: Weekdays, Weekends, Full-time, Part-time)
- Event (Lookup to NGO Event)



SETUP > OBJECT MANAGER
Volunteer

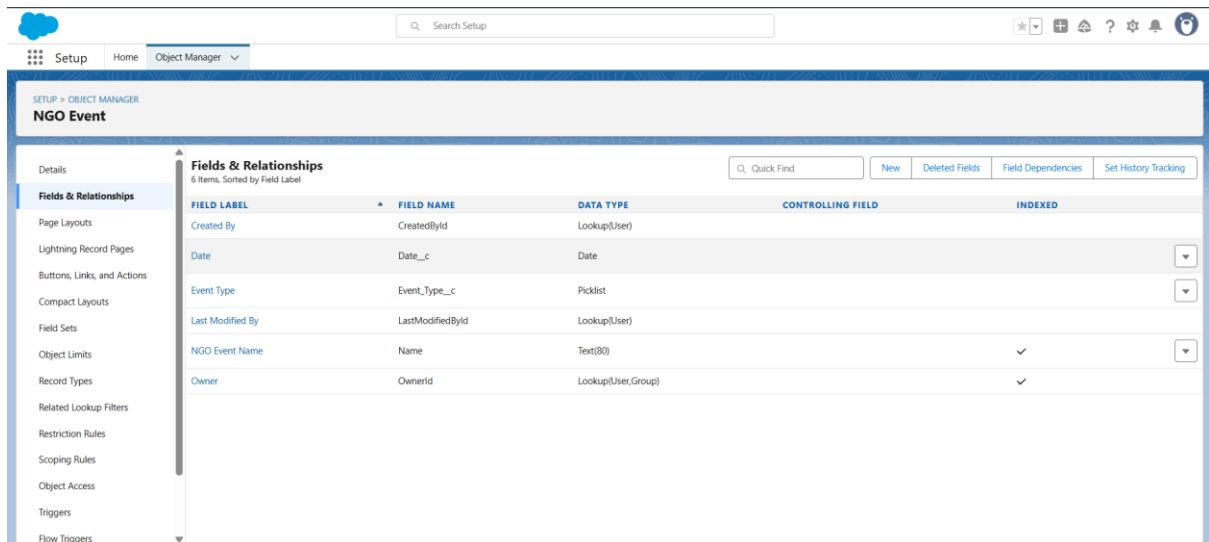
Details

Fields & Relationships
8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Availability	Availability__c	Picklist		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
Skills	Skills__c	Picklist		
Volunteer Name	Name	Text(80)		✓

- **NGO Event Fields:**

- Event Name (Text)
- Event Date (Date)
- Event Type (Picklist: Fundraiser, Camp, Drive, etc.)



SETUP > OBJECT MANAGER
NGO Event

Details

Fields & Relationships
6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Date	Date__c	Date		
Event Type	Event_Type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
NGO Event Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓

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

- Volunteer (Lookup to Volunteer)
- Event (Lookup to NGO Event)

The screenshot shows the Salesforce Setup interface for the 'Volunteer' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled 'Fields & Relationships' and shows a table of 8 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are Availability, Created By, Email, Last Modified By, Owner, Phone, Skills, and Volunteer Name. The 'Volunteer Name' field is highlighted in blue. At the bottom right, the user 'McAfee' is logged in.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Availability	Availability__c	Picklist		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
Skills	Skills__c	Picklist		
Volunteer Name	Name	Text(80)		✓

3.3 Record Types:

- Created **Donation Record Types** to categorize contributions:
 - Monetary Donation** – Cash, check, or online contributions.
 - In-Kind Donation** – Goods, services, or volunteer time contributions.

The screenshot shows the Salesforce Setup interface for the 'Donation' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types (selected), Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, Triggers, and Flow Triggers. The main content area is titled 'Record Types' and shows a table of 2 items, sorted by Record Type Label. The table has columns for RECORD TYPE LABEL, DESCRIPTION, ACTIVE, and MODIFIED BY. The record types listed are In-Kind Donation and Monetary Donation. The 'In-Kind Donation' record type is highlighted in blue.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
In-Kind Donation	Goods, services, or volunteer time contributions	✓	sudeshna pendyala, 9/25/2025, 4:18 AM
Monetary Donation	Cash, check, or online monetary contributions	✓	sudeshna pendyala, 9/25/2025, 4:18 AM

3.4 Page Layouts:

- Donation Page Layout:**
 - Top Section: Donation Name, Donor, Status.
 - Middle Section: Donation Amount, Donation Date.
 - Bottom Section: Custom fields.

- **Volunteer Page Layout:**

- Includes Email, Phone, Skills, Availability, Assigned Event.

The screenshot shows the Salesforce Setup interface for the 'Donation' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, Triggers, and Flow Triggers. The main content area displays the 'Donation Detail' layout editor. At the top, there's a 'Fields' section with a 'Quick Find' bar and a list of fields including Donation Date, Donation Name, Owner, Record Type, Status, Donor, Donation Amount, and Last Modified By. Below this, the 'Donation Detail' section shows a preview of the layout with standard buttons (Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, Edit Labels) and custom buttons. The preview includes sections for Information (Donation Name, Status, Donor, Donation Amount, Donation Date), System Information (Created By, Last Modified By), and Custom Links. A 'Mobile Cards' section at the bottom allows for drag-and-drop of expanded lookups and mobile-enabled Visualforce pages.

3.5 Compact Layouts:

- Created a **Donation Compact Layout** with fields:

- Donation Name
- Donor
- Donation Amount
- Status

The screenshot shows the Salesforce Setup interface for the 'Donation Compact Layout'. The left sidebar is the same as the previous screenshot, with 'Compact Layouts' selected. The main content area displays the 'Donation Compact Layout' detail page. At the top, there's a 'Donation Compact Layout' section with a 'Back to Donation' link. Below this, the 'Compact Layout Detail' section shows a table with columns for Label, API Name, Included Fields, Object Name, Created By, and Modified By. The table contains one entry for the 'Donation Compact Layout' with the following details: Label: Donation Compact Layout, API Name: Donation_Compact_Layout, Included Fields: Donation Name, Donor, Donation Amount, Donation Date, Status, Object Name: Donation, Created By: sudeshna.pandeyale, 9/25/2025, 4:42 AM, and Modified By: sudeshna.pandeyale, 9/25/2025, 4:42 AM. The table also includes standard buttons (Edit, Clone, Delete) and a 'Compact Layout Assignment' link.

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.

