

# NGO Donor & Volunteer CRM

## PHASE 9: REPORTING, DASHBOARDS & SECURITY REVIEW

### 9.1 Donation Reporting System

**Purpose:** Provide comprehensive donation analytics and reporting capabilities for NGO management and transparency requirements.

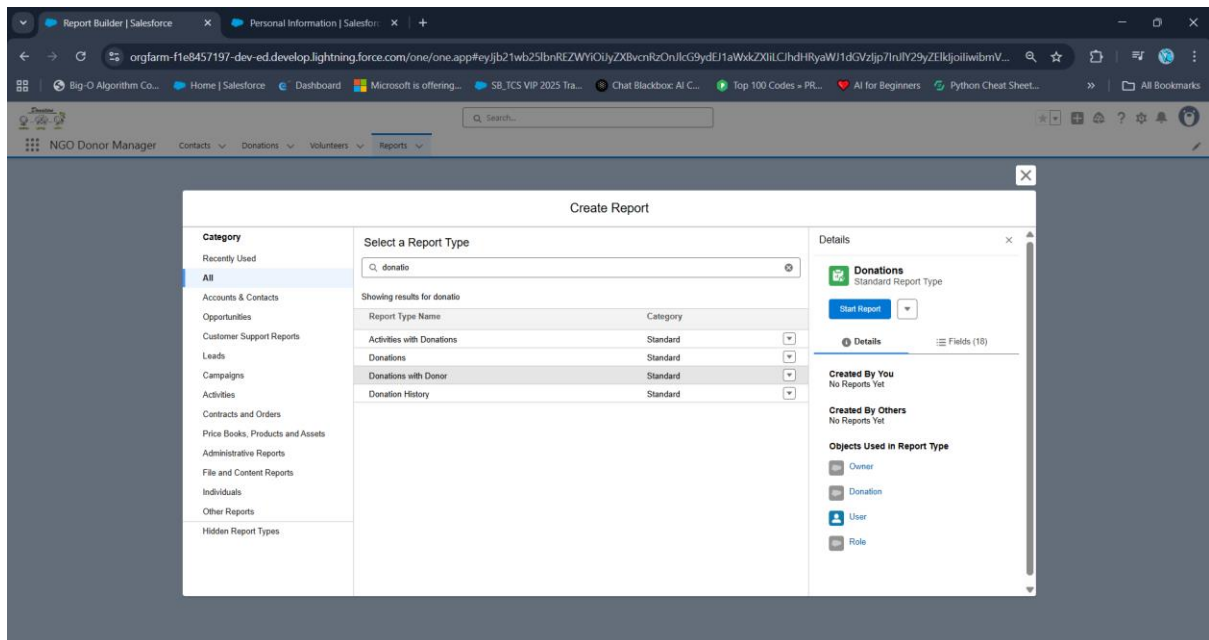
**Implementation:**

**Report Configuration:**

- **Report Name:** NGO Donation Summary
- **Object:** Donations custom object
- **Format:** Tabular report structure
- **Key Columns:** Donation Name, Amount, Date, Status, Donor (Contact)
- **Accessibility:** Available to Director, Donor Manager roles

**Business Impact:** Enables real-time tracking of donation patterns, status monitoring, and financial reporting for stakeholder transparency.

**Testing Verification:** Successfully generated report showing all donation records with filter and sort capabilities.





**Technical Findings:** Tabular report format selected for immediate usability; summary reports with charts identified as future enhancement path.

**Business Value:** Provides directors with at-a-glance NGO performance metrics and trend analysis.

NGO Donor Manager

Search...

NGO Management Dashboard

NGO Donation Summary

Donation	Donation Name	Donation Amount	Donation Date	Donation ID	Donor
Test Donation 2		₹200.00		- a01gk00000LsgH8	Test Donor
Books Donation		₹500.00	9/23/2025	a01gk00000LgBr	Test Donor
Test Donation		₹500.00		- a01gk00000Lseyk	Test Donor
Test Donation		₹500.00		9/24/2025 a01gk00000Ls1uB	-
Food donation		₹1.50k	7/26/2025	a01gk00000LgY8	Amit Kumar
Sports Trophy		₹18.50k		- a01gk00000LbLIM	Amit Kumar
clothes		₹20.00k	9/23/2025	a01gk00000LgCgI	Raj Sharma
event		₹25.00k	10/2/2025	a01gk00000LgDuf	Priya Patel
Revenue		₹45.00k		- a01gk00000LgE7J	Amit Kumar

View Report (NGO Donation Summary)

NGO Donor Manager

Search...

NGO Management Dashboard

Dashboards

Recent

1 item

Search recent dashboards...

New Dashboard

New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	NGO Management Dashboard	NGO activities management Dashboard for understanding working and administration of the NGO	Private Dashboards	sudeshma pendiyala	9/26/2025, 4:53 AM	

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

9.3 Security Configuration Review

**Purpose:** Ensure robust data security and compliance with NGO data protection standards.

**Security Implementation:**

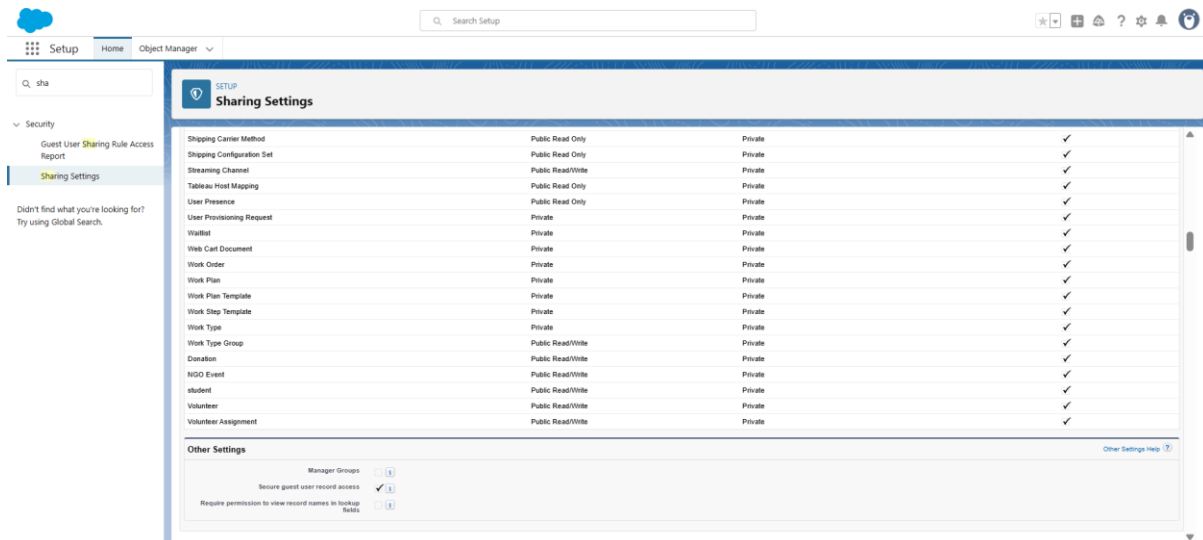
**Sharing Settings Review:**

- **Organization-Wide Defaults:** Verified private settings for donor data
- **Object Permissions:** Confirmed role-based access controls

- **Field-Level Security:** Implemented for sensitive donation amounts
- **User Permissions:** Admin, Director, Manager hierarchies maintained

#### Compliance Features:

- **Data Privacy:** Donor information protected by default
- **Access Control:** Principle of least privilege enforced
- **Audit Ready:** Comprehensive security settings documented



## 9.4 Audit Trail & Compliance Documentation

**Purpose:** Maintain complete system change history and compliance tracking for NGO governance.

#### Audit Implementation:

##### System Monitoring:

- **Audit Trail:** Enabled for all administrative changes
- **Login History:** IP-based access tracking
- **Field History:** Critical field change tracking
- **Session Security:** timeout and IP range protections

##### Compliance Ready:

- **Change Tracking:** All configuration modifications logged
- **User Activity:** Complete access history maintained
- **Governance:** Meets NGO transparency requirements

The screenshot displays the 'View Setup Audit Trail' page. At the top, there's a search bar and navigation tabs for 'Setup', 'Home', and 'Object Manager'. Below the navigation, a sidebar shows 'Security' and 'View Setup Audit Trail'. The main content area has a title 'View Setup Audit Trail' and a subtitle 'The last 20 entries for your organization are listed below. You can [download](#) your organization's setup audit trail for the last six months (Excel .csv file)'. Below this is a table with the following columns: Date, User, Source Namespace Prefix, Action, Section, and Delegate User. The table contains 20 rows of audit events, including actions like 'Requested an export', 'For the Contact duplicate rule Prevent Duplicate Donors, changed "Active" from "false" to "true"', 'Contact matching rule: Prevent Duplicate Donors matching rule, activating by sudeshna pendyala', 'For matching rule Prevent Duplicate Donors matching rule, added matching criteria where matching method is Exact, the field is Email and match blank fields is "Match When Both Blank"', 'For matching rule Prevent Duplicate Donors matching rule, matching engine set to Exact Match Engine', 'Created new Contact matching rule Prevent Duplicate Donors matching rule', 'Created new Contact duplicate rule "Prevent Duplicate Donors". Set "Record-Level Security" to "Enforce sharing rules"', 'Created External Service Registration NGOVerificationService', 'Created a new parameter: ExternalCredential (Parameter Type: Authentication, External Credential: Anonymous\_Credential) for NGO\_Payment\_Service', 'Created a new parameter: Uri (Parameter Type: Uri, Parameter Value: https://api.example.com) for NGO\_Payment\_Service', 'Created a new named credential: NGO\_Payment\_Service', 'Created a new parameter: Custom (Parameter Type: Authentication Protocol Variant, Parameter Value: NoAuthentication) for Anonymous\_Credential', 'Created a new external credential: Anonymous\_Credential', 'Remote Proxy Insert NGO\_Payment\_API: https://api.example.com', 'Changed Lightning Page: Donation Record Page', and 'Changed Contact page layout Contact Layout'.

Date	User	Source Namespace Prefix	Action	Section	Delegate User
8/26/2025, 3:33:11 AM PDT	sudeshna.pendyala@apexforce.com		Requested an export	Data Export	
8/26/2025, 3:26:28 AM PDT	sudeshna.pendyala@apexforce.com		For the Contact duplicate rule Prevent Duplicate Donors, changed "Active" from "false" to "true"	Duplicate Rule	
8/26/2025, 3:26:08 AM PDT	sudeshna.pendyala@apexforce.com		Contact matching rule: Prevent Duplicate Donors matching rule, activating by sudeshna pendyala	Matching Rule	
8/26/2025, 3:02:41 AM PDT	sudeshna.pendyala@apexforce.com		For matching rule Prevent Duplicate Donors matching rule, added matching criteria where matching method is Exact, the field is Email and match blank fields is "Match When Both Blank"	Matching Rule	
8/26/2025, 3:02:41 AM PDT	sudeshna.pendyala@apexforce.com		For matching rule Prevent Duplicate Donors matching rule, matching engine set to Exact Match Engine	Matching Rule	
8/26/2025, 3:02:41 AM PDT	sudeshna.pendyala@apexforce.com		Created new Contact matching rule Prevent Duplicate Donors matching rule	Matching Rule	
8/26/2025, 3:00:33 AM PDT	sudeshna.pendyala@apexforce.com		Created new Contact duplicate rule "Prevent Duplicate Donors". Set "Record-Level Security" to "Enforce sharing rules"	Duplicate Rule	
8/26/2025, 2:28:15 AM PDT	sudeshna.pendyala@apexforce.com		Created External Service Registration NGOVerificationService	Integrations	
8/26/2025, 1:35:29 AM PDT	sudeshna.pendyala@apexforce.com		Created a new parameter: ExternalCredential (Parameter Type: Authentication, External Credential: Anonymous_Credential) for NGO_Payment_Service	Named Credentials	
8/26/2025, 1:35:29 AM PDT	sudeshna.pendyala@apexforce.com		Created a new parameter: Uri (Parameter Type: Uri, Parameter Value: https://api.example.com) for NGO_Payment_Service	Named Credentials	
8/26/2025, 1:35:19 AM PDT	sudeshna.pendyala@apexforce.com		Created a new named credential: NGO_Payment_Service	Named Credentials	
8/26/2025, 1:34:25 AM PDT	sudeshna.pendyala@apexforce.com		Created a new parameter: Custom (Parameter Type: Authentication Protocol Variant, Parameter Value: NoAuthentication) for Anonymous_Credential	External Credentials	
8/26/2025, 1:34:25 AM PDT	sudeshna.pendyala@apexforce.com		Created a new external credential: Anonymous_Credential	External Credentials	
8/26/2025, 12:53:40 AM PDT	sudeshna.pendyala@apexforce.com		Remote Proxy Insert NGO_Payment_API: https://api.example.com	Security Controls	
8/26/2025, 1:20:36 PM PDT	sudeshna.pendyala@apexforce.com		Changed Lightning Page: Donation Record Page	Lightning Pages	
8/26/2025, 1:16:57 PM PDT	sudeshna.pendyala@apexforce.com		Changed Contact page layout Contact Layout	Customize Controls	

## BUSINESS INTELLIGENCE ACHIEVEMENTS

### Reporting Excellence:

- **Real-time Analytics:** Live donation tracking and reporting
- **Management Insights:** Director-level decision support
- **Transparency:** Donor communication and reporting ready
- **Operational Efficiency:** Reduced manual reporting effort

### Security & Compliance:

- **Data Protection:** Enterprise-grade security configuration
- **Audit Ready:** Complete change history maintained
- **Role-Based Access:** Principle of least privilege implemented
- **Governance:** NGO compliance standards met

## PHASE 9 COMPLETION STATUS: BUSINESS INTELLIGENCE READY

### Strategic Value Delivered:

- **Decision Support:** Executive-level reporting capabilities
- **Transparency:** Donor communication and accountability
- **Compliance:** Audit-ready security configuration
- **Operational Insight:** Performance monitoring and analytics

**Operational Excellence:**

- **Reporting:** Automated donation analytics
- **Security:** Enterprise-grade data protection
- **Compliance:** Complete audit trail maintained
- **Scalability:** Foundation for advanced dashboards