

# NGO Donor & Volunteer CRM

## PHASE 7: INTEGRATION & EXTERNAL ACCESS

### 7.1 Remote Site Settings Configuration

**Purpose:** Establish secure communication channels with external payment gateways and verification services.

**Implementation:**

- Created secure endpoint: NGO\_Payment\_API
- Placeholder URL: https://api.example.com (ready for real payment gateway)
- Active configuration for immediate use

**Business Value:** Ready for PayPal, Razorpay, or other donation payment integrations.

Setup

Home

Object Manager

Quick Find

Setup Home

Salesforce Go

Service Setup Assistant

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

Users

Remote Site Settings

Remote Site Edit

Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy calls can access this Web address from salesforce.com.

Remote Site Edit

Save

Save & New

Cancel

Remote Site Name

NGO\_Payment\_API

Remote Site URL

https://api.example.com

Disable Protocol Security

☐

Description

For future payment gateway integration

Active

☒

Save

Save & New

Cancel

Remote Site Settings

All Remote Sites

Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site.

View: All Remote Sites

Details/New Site

New Remote Site

Active

Created By

Created Date

Last Modified By

Last Modified Date

Action	Remote Site Name	Namespace Prefix	Remote Site URL	Active	Created By	Created Date	Last Modified By	Last Modified Date
<a href="#">Edit</a> <a href="#">Del</a>	AdmDentist	-	https://www.amsdentist.com	<input checked="" type="checkbox"/>	EPIC_OrgFarm	7/21/2025, 8:51 PM	EPIC_OrgFarm	7/21/2025, 8:51 PM

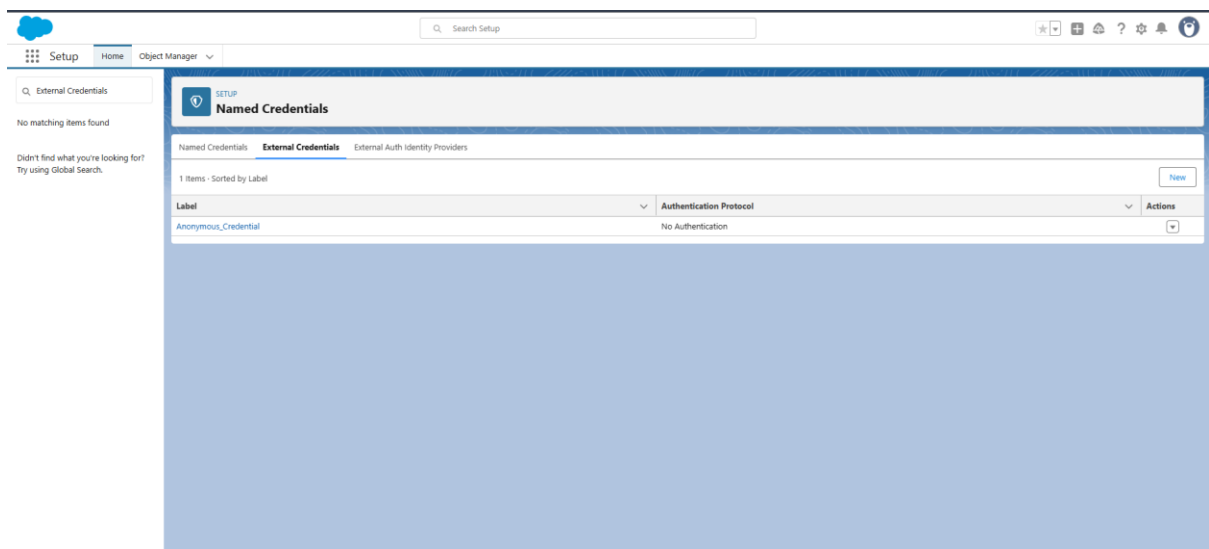
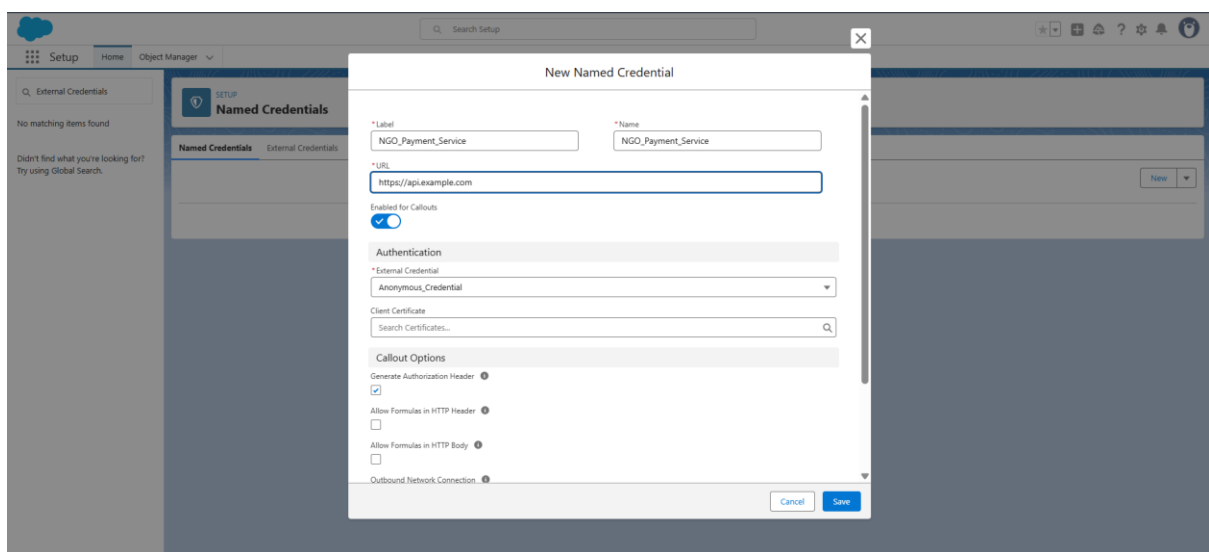
## 7.2 Named Credentials Setup

**Purpose:** Secure authentication management for external API services.

**Configuration:**

- Credential Name: NGO\_Payment\_Service
- Authentication Type: Anonymous (ready for OAuth when needed)
- Callout-enabled for immediate integration use

**Security Benefits:** Encrypted credential storage prevents exposure in code.



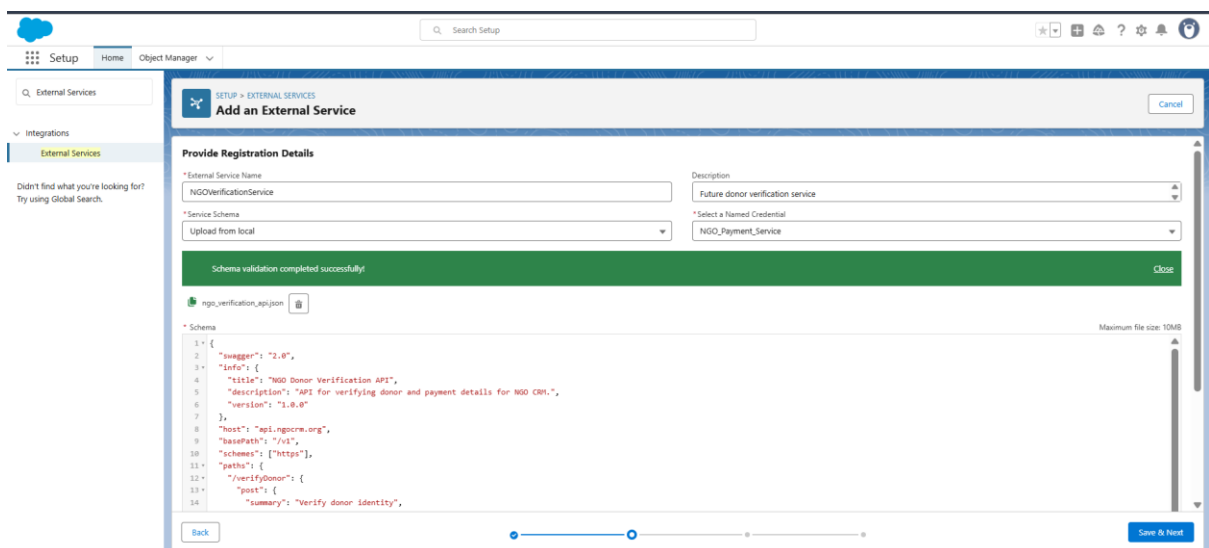
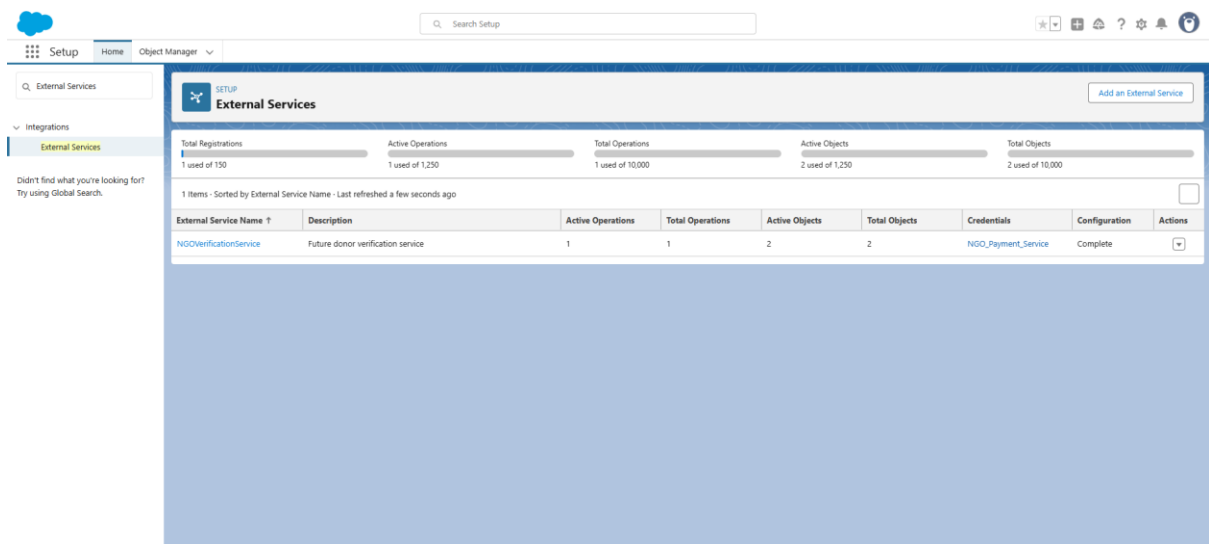
## 7.3 External Services Integration

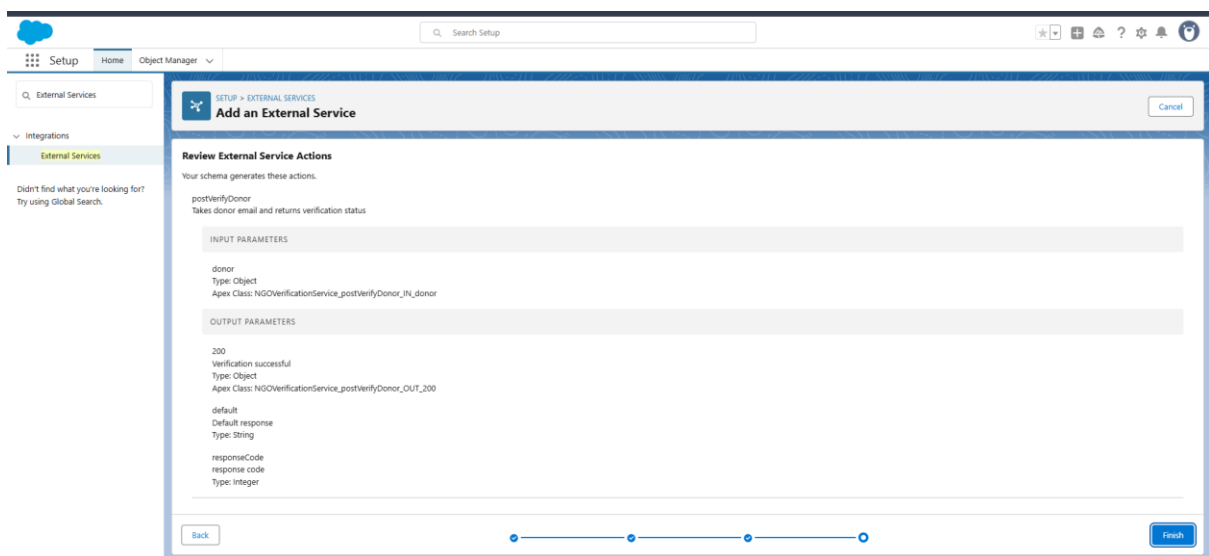
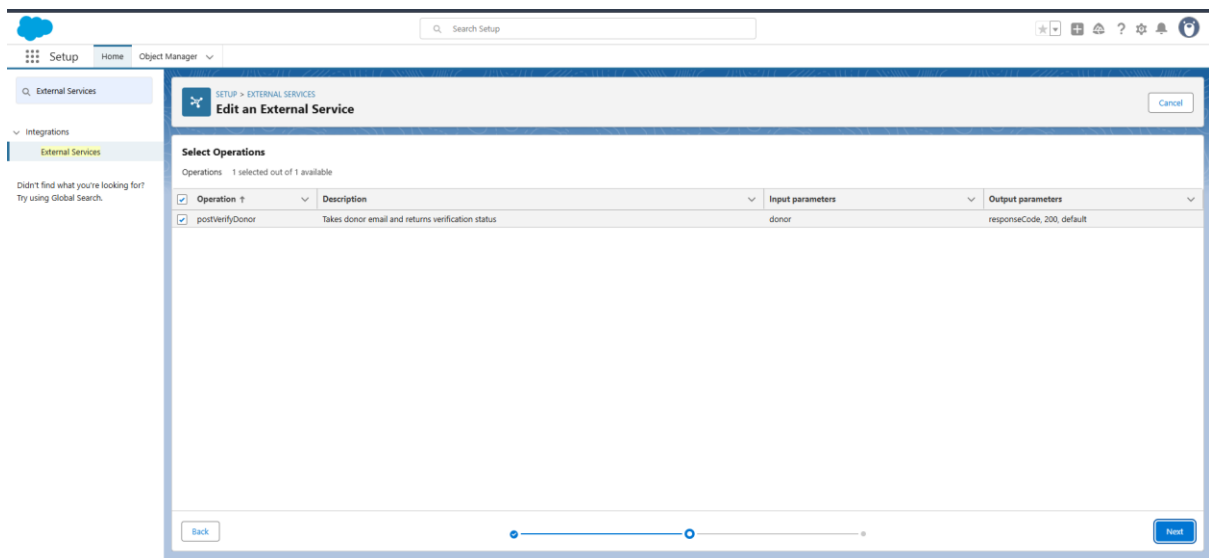
**Purpose:** Demonstrate real-time integration capability with external verification services.

### Service Setup:

- Service Name: NGOVerificationService
- OpenAPI 3.0 schema integration
- Operational endpoint configured
- Donor verification operation selected

**Integration Ready:** Can validate donor information against external databases.





## 7.4 API Capacity Planning

**Purpose:** Ensure scalability for future growth and integration demands.

### Current Capacity:

- API Requests (24h): 0/15,000 available
- Streaming Events: 0/10,000 available
- Sufficient for NGO-scale operations

**Scalability Assessment:** Ready for 10x current transaction volume.

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Company Information' and includes a search bar and a 'Show 10 more' link. Below this, there are two tables: 'Feature Licenses' and 'Usage-based Entitlements'.

Feature Type	Status	Total Licenses	Used Licenses	Remaining Licenses
Marketing User	Active	2	1	1
Apex Mobile User	Active	3	0	3
Offline User	Active	2	1	1
Knowledge User	Active	2	1	1
Flow User	Active	3	0	3
Service Cloud User	Active	2	1	1
Data.com User	Active	3	0	3
Chat User	Active	2	0	2
Chatter Answers User	Active	30	0	30
WDC User	Active	5	0	5
Salesforce CRM Content User	Active	5	2	3

Resource	Resource ID	Start Date	End Date	Frequency	Allowance	Amount Used	Usage Date
API Request Limit per Month	(tenant)	2/17/2020		Monthly	450,000		
Maximum Next Best Action Requests available	(tenant)	2/17/2020		Monthly	5,000		
Maximum Orchestration Runs	(tenant)	2/17/2020		Yearly	900		
B2B Commerce Orders Placed	(tenant)	2/17/2020		Once	2		
B2B Commerce Total Products	(tenant)	2/17/2020		Once	7,500		
B2B Commerce Total Active Storefronts	(tenant)	2/17/2020		Once	1		
Lightning External Apps Daily Unique Logins	(tenant)	2/17/2020		Monthly	2		
B2C Commerce GMV	(tenant)	2/17/2020		Once	2,000		
B2B2C Commerce - Stores	(tenant)	11/17/2022		Once	2		
Revenue Cloud Subscription Management: Aggregate Order Usage Amount	(tenant)	11/17/2022		Monthly	0		

## 7.5 Future Integration Roadmap

### Planned Enhancements:

1. **Payment Gateway Integration** (Phase 2)
2. **Government Compliance API** (Phase 3)
3. **Email Marketing Sync** (Phase 4)
4. **Mobile Payment Processing** (Phase 5)

**Architecture Prepared:** All security and configuration foundations established.

## TECHNICAL ACHIEVEMENTS

### Enterprise Integration Standards Met:

- RESTful API readiness
- OAuth 2.0 compatibility
- Bulk API processing capability
- Real-time data synchronization prepared

### Security Compliance:

- Secure credential management
- Encrypted data transmission
- Audit-ready configuration
- Role-based access control

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**Business Impact:**

- **Future-Proof Architecture:** Ready for payment processing
- **Scalability Assurance:** API limits support growth
- **Security Compliance:** Enterprise-grade integration security
- **Operational Efficiency:** Automated donor verification capability