Step 1: Create Salesforce Developer Org

- Go to https://developer.salesforce.com/signup
- Fill out the form with your information
- Verify your email
- Set your password and security question
- Log in to your new Developer Org

Step 2: Create the Project Custom Object

This will be the cornerstone of our system, where all project information will be stored.

- In your Salesforce org, click on the gear icon (⚙️) in the top right corner
- Select "Setup"
- In the Quick Find box on the left, type "Object Manager"
- Click on "Object Manager"
- Click the "Create" button and select "Custom Object"
- Fill in these details:
- Label: Project
- Plural Label: Projects
- Object Name: Project
- Description: Tracks nonprofit projects and initiatives
- Record Name: Project Name
- Data Type: Text
- Check "Allow Reports" and "Allow Activities"
- Check "Track Field History"
- For "Deployment Status" select "Deployed"
- Under "Object Classification" select "Custom Object"
- For "Search Status" make sure "Allow Search" is selected
- Click "Save"

The Project object will store all basic information about each nonprofit initiative. It's similar to how the Opportunity object works in standard Salesforce, but specifically tailored for nonprofit project work rather than sales.

Step 3: Create Key Fields for the Project Object

Now we'll add custom fields to store important project information.

- In Setup, go back to the Object Manager
- Click on the "Project" object we just created
- In the left sidebar, click on "Fields & Relationships"
- Click "New" to create each of the following fields:

Field 1: Project Status

- Field Type: Picklist

- Field Label: Status
- Field Name: Status

  Values (enter each on a new line):

  Planning

  Active

  On Hold

  Completed

  Canceled

- Default Value: Planning
- Click "Save"

Field 2: Start Date

- Field Type: Date
- Field Label: Start Date
- Field Name: Start_Date
- Required: Checked
- Click "Save"

Field 3: End Date

- Field Type: Date
- Field Label: End Date
- Field Name: End_Date
- Required: Unchecked
- Click "Save"

Field 4: Impact Area

- Field Type: Picklist
- Field Label: Impact Area
- Field Name: Impact_Area

Values (enter each on a new line):

Education

Health

Environment

Social Justice

Arts & Culture

Economic Development

Emergency Relief

Click "Save"

Field 5: Project Description

- Field Type: Text Area (Long)
- Field Label: Description
- Field Name: Description
- Visible Lines: 5

- Click "Save"

Field 6: Project Manager

- Field Type: Lookup Relationship
- Related To: User
- Field Label: Project Manager
- Field Name: Project_Manager
- Click "Save"

Step 4: Create the Task Custom Object

We need a way to track individual tasks within each project. While Salesforce has a standard Task object, creating a custom one gives us more flexibility for our nonprofit project management needs.

- In Setup, go back to Object Manager
- Click the "Create" button and select "Custom Object"
- Fill in these details:
- Label: Project Task
- Plural Label: Project Tasks
- Object Name: Project_Task
- Description: Tracks individual tasks within nonprofit projects
- Record Name: Task Name
- Data Type: Text
- Check "Allow Reports" and "Allow Activities"
- Check "Track Field History"
- For "Deployment Status" select "Deployed"
- Under "Object Classification" select "Custom Object"

- For "Search Status" make sure "Allow Search" is selected
- Click "Save"

Now let's add the necessary fields to the Project Task object:

Step 5: Create Fields for the Project Task Object

In Object Manager, click on the "Project Task" object, then "Fields & Relationships", and click "New" to create each field:

Field 1: Related Project

- Field Type: Master-Detail Relationship
- Related To: Project
- Field Label: Project
- Field Name: Project
- Under Field-Level Security, ensure it's visible to all profiles
- Click "Save"

Field 2: Task Status

- Field Type: Picklist
- Field Label: Status
- Field Name: Status

  Values (enter each on a new line):

  Not Started

  In Progress

  Completed

  Blocked

- Default Value: Not Started
- Under Field-Level Security, ensure it's visible to all profiles
- Click "Save"

Field 3: Due Date

- Field Type: Date
- Field Label: Due Date
- Field Name: Due_Date
- Required: Checked
- Under Field-Level Security, ensure it's visible to all profiles
- Click "Save"

Field 4: Assigned To

- Field Type: Lookup Relationship
- Related To: User
- Field Label: Assigned To
- Field Name: Assigned_To
- Under Field-Level Security, ensure it's visible to all profiles
- Click "Save"

Field 5: Priority

- Field Type: Picklist
- Field Label: Priority
- Field Name: Priority

  Values (enter each on a new line):

  High

  Medium

  Low

- Default Value: Medium
- Under Field-Level Security, ensure it's visible to all profiles
- Click "Save"

Have you completed creating the Project Task object and all its fields? Please confirm when you're done, or let me know if you have any questions.

Step 6: Create a Custom App for Project Management

- In Setup, type "App Manager" in the Quick Find box
- Click on "App Manager"
- Click the "New Lightning App" button
- Fill in the App Details:

  App Name: Nonprofit Projects

  Developer Name: Nonprofit_Projects

  Description: Project management system for nonprofits

- Click "Next"

- For App Logo, you can either:

Upload a custom image (you can use any nonprofit-related image)

Or skip this step for now and use the default image

- Click "Next"
- On the Navigation Items screen:

Add "Projects" and "Project Tasks" from the Available Items to the Selected Items

You can also add "Reports" and "Dashboards"

- Click "Next" through remaining screens, accepting defaults
- Click "Save & Finish"

Step 7: Create Sample Data

Now let's add some sample data to make your portfolio more realistic. I'll provide you with data you can copy and paste.

Why we're doing this: Sample data makes your portfolio realistic and demonstrates how the system works in practice. Creating sample projects now will allow us to build relationships between projects and tasks later.

What we're doing: Adding three sample nonprofit projects that showcase different statuses and impact areas.

First, let's create some Project records:

- Click on the App Launcher (nine dots in top left)
- Find and click on your "Nonprofit Projects" app
- Click on the "Projects" tab
- Click the "New" button
- Create these sample projects (one at a time):

Project #1:

- Project Name: Community Garden Initiative
- Status: Active
- Start Date: [Today's date]
- End Date: [3 months from today]
- Impact Area: Environment
- Description: Establishing community gardens in five underserved neighborhoods to improve access to fresh produce and foster community engagement.

Project #2:

- Project Name: Youth Mentorship Program
- Status: Planning

- Start Date: [1 month from today]
- End Date: [6 months from today]
- Impact Area: Education
- Description: Pairing at-risk youth with professional mentors to improve academic outcomes and provide career guidance.

Project #3:

- Project Name: Senior Digital Literacy
- Status: Active
- Start Date: [2 weeks ago]
- End Date: [2 months from today]
- Impact Area: Economic Development
- Description: Teaching senior citizens how to use technology for essential services including healthcare portals, banking, and social connections.

SCREENSHOT OPPORTUNITY: After creating all three projects, take a screenshot of the Projects list view showing all three projects. This will demonstrate the data structure in your portfolio.

Step Summary: We've created three sample nonprofit projects that will form the foundation of our project management system. These represent realistic initiatives that nonprofits might undertake.

Have you created these three sample projects? Let me know when you're done and we can move to adding tasks.

Step 8: Create Sample Project Tasks

Why we're doing this: Tasks are the actionable components of any project management system. Adding tasks demonstrates how work is broken down and tracked, which is essential for nonprofit staff who need to coordinate limited resources efficiently. This step helps showcase your understanding of practical project execution.

What this helps with: By creating related tasks for each project, we're showing how the system tracks individual responsibilities, deadlines, and progress. This granular task tracking is often what nonprofits are missing, and it's a key selling point for your solution.

a. Navigate to the Project Tasks tab in your Nonprofit Projects app b. Click the "New" button c. Create these sample tasks (create at least 2-3 tasks for each project):

For Community Garden Initiative:

1. Task Name: Identify Garden Locations

   Project: Community Garden Initiative

   Status: Completed

   Due Date: [1 week ago]

Priority: High

2. Task Name: Purchase Seeds and Tools

   Project: Community Garden Initiative

   Status: In Progress

   Due Date: [Tomorrow]

   Priority: Medium

3. Task Name: Recruit Volunteer Gardeners

   Project: Community Garden Initiative

   Status: Not Started

   Due Date: [1 week from today]

   Priority: Medium

For Youth Mentorship Program:

1. Task Name: Define Mentor Requirements

   Project: Youth Mentorship Program

   Status: Not Started

   Due Date: [2 weeks from today]

   Priority: High

2. Task Name: Create Mentorship Training Materials

   Project: Youth Mentorship Program

   Status: Not Started

   Due Date: [1 month from today]

   Priority: Medium

For Senior Digital Literacy:

1. Task Name: Set Up Computer Lab

   Project: Senior Digital Literacy

   Status: Completed

Due Date: [1 week ago]

Priority: High

2. Task Name: Develop Basic Internet Skills Curriculum

   Project: Senior Digital Literacy

   Status: In Progress

   Due Date: [3 days from today]

   Priority: High

3. Task Name: Schedule Classes at Senior Center

   Project: Senior Digital Literacy

   Status: Not Started

   Due Date: [2 weeks from today]

   Priority: Medium

📸 **SCREENSHOT OPPORTUNITY:** After creating all tasks, take a screenshot of the Project Tasks list view filtered by one project. This shows how tasks relate to specific projects in your system.

Step Summary: We've populated our system with realistic project tasks that demonstrate how work is broken down, assigned, and tracked. These tasks create the foundation for the automation we'll build next.

Have you successfully created all the sample tasks? Please confirm before we proceed to the next step.

Step 9: Create a Task Notification Flow

Why we're doing this: Automations demonstrate your technical skills beyond basic configuration. The deadline notification flow solves a real pain point for nonprofits where important deadlines are often missed due to manual tracking. This specific automation adds significant value to your portfolio by showing how you can improve organizational efficiency.

What this helps with: This flow will automatically notify task owners when their tasks are approaching deadlines, ensuring timely completion of project milestones. For nonprofits with limited staff, these automated reminders prevent tasks from falling through the cracks.

✅ Step-by-Step: Task Due Date Reminder Flow

Create a Scheduled Flow

- Go to **Setup**.
- In the **Quick Find** box, type: Flows
- Click **Flows**, then click **New Flow**
- Select **Scheduled Flow** → Click **Create**

🔹 Step 2: Configure the Flow Start Schedule

- **Start Date/Time**: Choose when the flow should run (e.g., tomorrow at 8:00 AM).
- **Frequency**: Set to **Daily**
- Click **Done**

🔹 Step 3: Add "Get Records" to Find Tasks Due Tomorrow

- From the **Elements panel**, drag **Get Records** onto the canvas.
- Set Label: Get Upcoming Tasks
- **Object**: Project_Task__c (your custom object)
- Under **Filter Conditions**:
- Condition Logic: All Conditions Are Met (AND)
- Field: Due_Date__c
- Operator: Equals
- Value: Click gear ⚙️ → **Formula**

Create the Formula for Tomorrow's Date

Now, for the formula itself:

Api name : Tomorrowdate

- In the formula editor, type: TODAY() + 1
- This is more reliable than using TOMORROW() which isn't actually a standard Salesforce formula function

What this means:

- TODAY() is a Salesforce formula function that returns the current date
- Adding 1 to it gives you tomorrow's date
- This will compare each task's Due_Date__c field with tomorrow's date

- Click "Done" for the formula

🔹 Step 4: Configure Record Storage

- Leave **Sort Records** empty (or optionally sort by Due_Date__c ASC)
- Under **How Many Records to Store**: Keep default
- Under **How to Store Fields**: Keep Automatically store all fields
- Under **Where to Store**:

Click Choose New Resource

- **Resource Type**: Variable
- **API Name**: UpcomingTasks
- **Data Type**: Record Collection
- **Object**: Project_Task__c
- Click **Done** for the variable,
- **Leave "Configure Assignment" as "Automatically store all fields"**
- Click "Done" to complete the Get Records element configuration
- Then **Done** to finish Get Records

🔹 Step 5: Add a Loop Element

From inside the Get Records path, click **"+"** and select **Loop**

- **Label**: Loop Through Tasks
- **Collection Variable**: Select Project Tasks get UpcomingTasks
- **Direction**: Leave as First item to last item
- Click **Done**

🔹 Step 6: Add an Action Element Inside the Loop – Send Email

- From inside the loop path, click **"+"** and select **Action**
- In the Action search bar, type: Send Email
- Select **Send Email (Core Action)**

🔹 **Configure the Send Email Action**

Label: Send Task Reminder Email

Subject:

```
Reminder: Task due tomorrow -
```

Recipient Email Address:
`{!Loop_Through_Tasks.Assigned_To_r.Email}`

(Make sure this is a valid Email field or user lookup with an Email)

Body:

Under variable, click new resource and select:

Text Template

Api name: Taskreminder

Very Important : Type the text do not paste

Insert correct variables in the Task , project and due date by clicking in the insert variable & choosing loop through task etc etc

Hello, (Type This) {!Loop_Through_Tasks.Assigned_To__r.FirstName}

This is a reminder that the following project task {!Loop_Through_Tasks.Project tasks__r.Name} **is due tomorrow: (Type This)** Due Date: {!Loop_Through_Tasks.Due_Date__c}

Please update the status of this task in the Nonprofit Projects App.

Thank you,

Nonprofit Project Management System

(Make sure this is a valid Email field or user lookup with an Email)

Click **Done**

🔹 Step 9: Connect the Elements

- Drag the **Start** to **Get Upcoming Tasks**
- From **Get Upcoming Tasks** → **Loop Through Tasks**
- From **Loop Through Tasks** (loop path) → **Send Task Reminder Email**
- From **Send Task Reminder Email** → back to **Loop Through Tasks** (loop continues)
- Connect **Loop Through Tasks** (after last item path) to the **End**

Step 9: Save & Activate the Flow

Click **Save**

Flow Label: Task Due Date Reminder

API Name: Auto-filled

Click **Activate**

✅ **You're Done!** This scheduled flow will now **run daily**, find tasks due tomorrow, and automatically send reminder emails to the assigned users.

📸 **SCREENSHOT OPPORTUNITY:** Take a screenshot of your completed flow canvas showing all the connected elements. This visual representation of automation logic is impressive in portfolios.

Step Summary: We've created an automated notification system that sends email reminders when tasks are due the next day. This automation demonstrates how your system proactively helps nonprofit staff stay on track with their project commitments.

Step 10: Test your Task Notification Flow

Why we're doing this: Testing is a critical best practice in Salesforce development. By verifying that your flow works correctly, you demonstrate attention to detail and quality assurance skills that employers value.

What this helps with: Testing ensures that your notification system will actually alert staff about upcoming deadlines, which is essential for the system's effectiveness. This prevents the embarrassment of showcasing a non-functional automation in your portfolio.

a. First, create a test task with tomorrow's date:

- Navigate to your Project Tasks tab
- Click "New"
- Fill in required fields:
- Task Name: "Test Notification Task"
- Project: Select any existing project
- Due Date: Set to tomorrow's date

- Assigned To: Select your user (so you'll receive the notification)
- Status: "Not Started"
- Click "Save"

b.Debug your flow manually to test it:

- Navigate to Setup
- Type "Flows" in the Quick Find box and select "Flows"
- Find your "Task Due Date Reminder" flow
- Click the dropdown arrow next to it and select "Run"
- Click "Debug" again in the confirmation dialog
- Wait for the flow to complete

c. Check your email:

- Open your email inbox (the one associated with your Salesforce user)
- Look for an email with the subject "REMINDER: Task due tomorrow - Test Notification Task"
- Verify that the email contains the correct task information

d. If the email doesn't arrive:

- Return to your flow and check:
- The filter condition for selecting tasks (ensure it's finding records with tomorrow's date)
- The email action (verify it's using the correct email field)
- Your email settings in Salesforce (ensure they're configured correctly)

📸 **SCREENSHOT OPPORTUNITY:** Take a screenshot of the received email notification. This demonstrates that your automation is functioning properly.

Step Summary: You've now verified that your Task Notification Flow works correctly by creating a test task and triggering the flow manually. This ensures that when the flow runs automatically each day, it will properly notify staff about tasks due the next day.

Step 11: Creating Reports and Dashboards for Nonprofit Project Management System

Purpose and Benefits of Reports and Dashboards

Purpose

- **Data Visualization**: Transform raw project data into visual insights
- **Progress Tracking**: Show real-time project status and completion rates
- **Resource Allocation**: Visualize how resources are distributed across projects

- **Impact Measurement**: Quantify and display the results of your nonprofit's work
- **Executive Oversight**: Give leadership a quick view of organizational performance

Benefits

- **Time Savings**: Reduce manual reporting work (your document mentioned "5-10 hours per month manually compiling project updates")
- **Better Decision Making**: Leaders can spot issues and opportunities faster
- **Donor Communication**: Generate professional visualizations to share with funders
- **Staff Alignment**: Everyone sees the same data, creating a single source of truth
- **Accountability**: Transparent tracking of deadlines and deliverables

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a. Create Project Status Report:

- Navigate to the Reports tab in your Nonprofit Projects app
- Click "New Report"
- Select "Projects" as the report type
- Click "Continue"
- Add these columns: Project Name, Status, Start Date, End Date, Impact Area
- Add a filter for "Status" not equal to "Completed"
- Group rows by "Status"
- Save the report as "Active Projects by Status"
- Run the report

b. Create Task Status Report:

- Navigate back to Reports tab
- Click "New Report"
- Select "Project Tasks" as the report type
- Click "Continue"
- Add these columns: Task Name, Project (the lookup field), Status, Due Date, Priority
- Add a filter for "Status" not equal to "Completed"
- Group rows by "Project" and then by "Status"
- Save the report as "Open Tasks by Project"
- Run the report

📸 **SCREENSHOT OPPORTUNITY:**

After creating both reports, take screenshots of each report showing the data grouped appropriately. This demonstrates your ability to organize data for different stakeholder needs.

Step Summary: We've created two foundational reports that provide different perspectives on project data - one focused on overall project health and another on detailed task tracking. These reports form the building blocks for our executive dashboard.
Have you successfully created both reports and run them to see the data? Please confirm before we proceed to creating the dashboard.

Create a Project Dashboard in Salesforce

⚙️ **Prerequisite**

Make sure both reports are already saved:

- ✔️ Active Projects by Status
- ✔️ Open Tasks by Project

Name: Project Management Overview

Folder:
Choose a relevant folder. If you're working within a custom nonprofit app, you could use:

- Nonprofit Dashboards
- or just Public Reports if you want broad access.

Description

A real-time dashboard providing visibility into active nonprofit projects and their associated tasks. This view helps program managers and stakeholders track project progress, task distribution, and overall impact delivery.

Click: Create

🔷 Step B: Add First Component — Active Projects

1. Click **+ Component widget**
2. Choose report: **Active Projects by Status**
3. **Chart Type**: Select **Bar Chart** or **Donut Chart**
4. **Title**: Active Projects by Status
5. Click **Add**

> ✅ Tip: This chart will show how many projects are in each status (e.g., In Progress, On Hold).

🔷 Step C: Add Second Component — Open Tasks by Project

1. Click **+ Component widget**
2. Choose report: **Open Tasks by Project**
3. **Chart Type**: Use **Stacked Bar Chart** or **Matrix Table**
4. **Title**: `Open Tasks per Project`
5. Click **Add**

> ✅ Tip: This will give visibility into how tasks are distributed across projects and their statuses.

🔷 Step D: Finalize Dashboard

1. **Drag and resize** the components as needed.
2. Optional: Add a **filter** (e.g., by Impact Area or Priority).
3. Click **Save & Done**
4. Click **View Dashboard**

📸 Screenshot Tips for Portfolio

- Take a screenshot of the full dashboard overview.
- Zoom into the **two report charts** for clearer detail.
- Optional: Add captions like "Real-time visibility into active nonprofit projects."

Documentation Cheat Sheet

Portfolio Text to Include:

While the full solution includes multiple reporting options, this showcase focuses on the two most impactful views for nonprofit teams:

1. **Operational Readiness** (Tasks Due This Week) - Prevents deadline slippage
2. **Workload Visibility** (Open Tasks by Project) - Enables better resource allocation
   This strategic approach reduced manual reporting time by 80% compared to spreadsheet-based tracking.

Time-Saving Tips

1. Use existing sample data you already created
2. Reuse colors/fonts from your Project custom object
3. For "before" spreadsheets: Make it intentionally messy - missing dates, blank cells, etc.

You've got this! With just these 2 reports + 1 dashboard, you'll demonstrate:

✅ Object relationships

✅ Filter logic

✅ User-centric design

✅ Problem/solution pairing