



# ***Solution Design Document***

**VARNIKA PRASAD**

**VXP210087**



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# INTRODUCTION

I was involved in a project for a non-profit organization named "It's going to be OK", and this document is a summary of the progress made during the project. The project's main goal was to assist Dr. Tonya and her team in creating a functional Salesforce organization and streamlining their operations.

To achieve this goal, we designed and implemented various processes that catered to the specific needs of IGTBOK, such as security, managing donors, improving user-friendliness, and maintaining client records.

The primary aim of this SSD document is to provide a comprehensive guide for Dr. Tonya and her team to refer back to in case they have any questions or doubts about the processes that we have created for them. This document will serve as a useful reference tool for them to understand the functionality of the processes.

In particular, the document will focus on two processes, which are the Donor process and Reports and Dashboard.

# PURPOSE

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The SDD will serve as a guide for all stakeholders involved in the project, including developers, administrators, and end-users. It will outline the project approach, including the methodologies, tools, and resources that will be used to complete the project.

The SDD will also provide a detailed description of the solution architecture, including the data model, user interface, and integration with other systems. The SDD will define the user profiles and roles, as well as the security requirements for the Salesforce organization. It will outline the access controls and permissions that will be implemented to ensure that only authorized users have access to sensitive data.

Overall, the SDD will provide a clear and comprehensive plan for the implementation of the Salesforce organization for the non-profit organization. It will ensure that all stakeholders have a shared understanding of the project and its objectives, and that the project is completed successfully.

# OVERVIEW OF ROF

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The ROF document is a comprehensive summary of the various teams that worked together to create a fully functional org for Dr. Tonya. There was a total of five teams: Security, Usability, Donor Process, Process, and Reports and Dashboard. Each team was responsible for a unique task, which they detailed in the document. The objective of the teams was to ensure that, by the end of the three-day project, Tonya had a fully operational org that could assist her in multiple aspects.

During the weekend standup session, the teams focused on assisting Tonya and her colleagues in utilizing Salesforce's resources to streamline their operations and take advantage of cutting-edge technology. The primary aim of the session was to redevelop the IGTBOK org and provide Tonya and her team with the necessary training to transition from traditional paperwork to a paperless CRM system. This new system simplifies the process of managing clients, accounts, donations, and other vital functions.

With the guidance of Professor Thanwalla and his team, Dr. Tonya's organization will be better equipped than ever before to achieve its mission and make a positive impact in the community. The power of technology will help them streamline their processes, save time and resources, and ultimately serve their clients more efficiently. The weekend standup session was a success, and the SSD document serves as an excellent guide for Tonya and her team to refer back to as they implement the new processes and utilize the new org.

# CLIENT OVERVIEW

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It's Going To Be Ok Inc. (IGTBOK) is a non-profit organization that was established by Tonya Stafford, a survivor of human trafficking herself. The primary objective of IGTBOK is to assist survivors of human trafficking and ultimately eliminate this heinous crime. Tonya's vision is focused on rescuing, restoring, and educating individuals who have been victims of human trafficking. The organization's aim is to provide support to individuals from diverse backgrounds and ethnicities, irrespective of who they are.

Tonya founded IGTBOK in 2014, and since then, the organization has grown exponentially and has been recognized throughout the state of Texas and the United States. The organization's efforts have been acknowledged for their contributions towards combating human trafficking and their work in helping survivors rebuild their lives. Through Tonya's leadership and dedication, IGTBOK continues to make a positive impact in the lives of human trafficking survivors, bringing hope and restoration to those in need.

# ORGANISATION SETUP

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**Company:** It's going to be OK

**Currency:** US Dollars

**IP Restrictions:** No IP restriction for IGTBOK org.

Utilization of salesforce **NPSP** module

# DONOR PROCESS TEAM

The Donor Process Team has made it easier for Tonya to add new donations and keep track of all her donations.

They have simplified the Donor Detail Form and created a simple process for adding new donations.

The team has also ensured that the Donor Log will send an email confirmation at the end of the year for Tax purposes. In addition, every time a donation is logged in, Tonya will receive an email confirmation.

These improvements have been implemented for both the desktop and mobile versions, making it easy for Tonya to keep track of her donations from anywhere.

## **DONOR DETAIL FORM:**

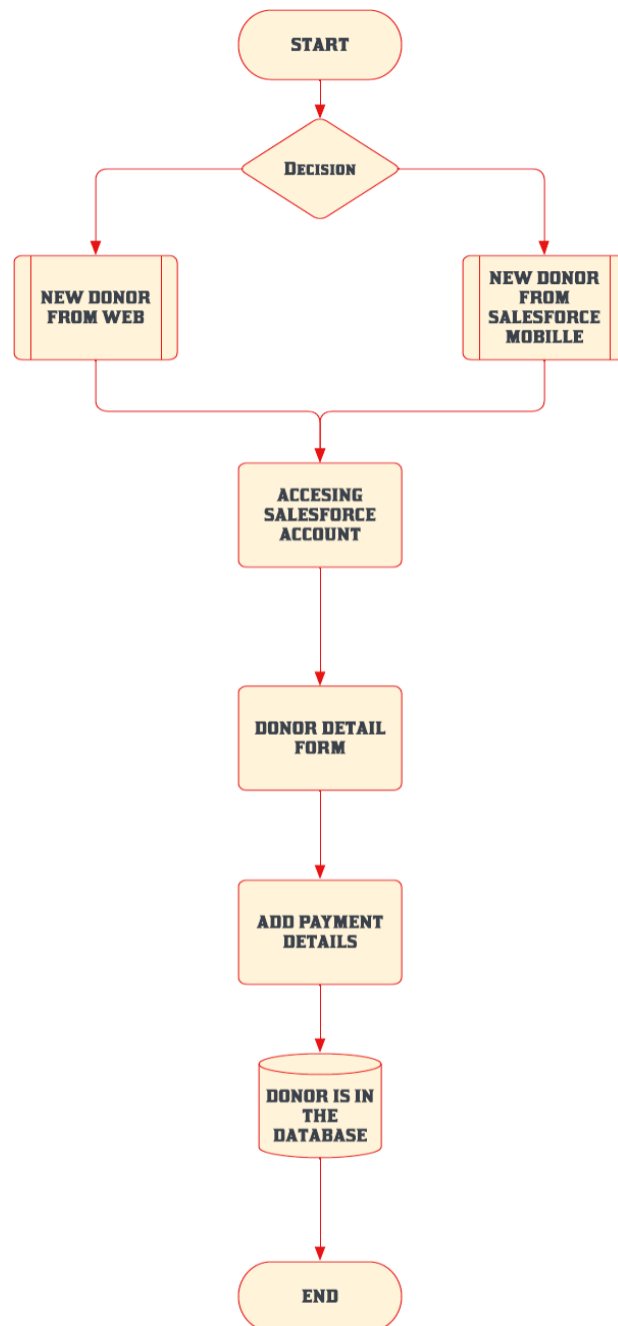
- Name
- Contact
- Email
- Contact
- Origin (Gala, Cash, Race, Event)
- Amount Donated
- Payment Type
- Donation Source
- Check/ Reference Number

ITEM NAME	DESCRIPTION
<b>Production environment details</b>	Salesforce Sandbox, Developer org.
<b>Organization setup</b>	<p>Company: It's going to be OK</p> <p>Currency: US Dollars</p> <p>IP details: None</p> <p>Utilization of salesforce NPSP module</p>
<b>Objects used</b>	<p>Donor process: Contact, Account(household). Opportunity, Campaign</p> <p>Process Team: Contact, User, Activity, Account(Client)</p>
<b>Record type</b>	General data
<b>Security</b>	<p>PRIVATE:</p> <p>Created Different user profiles for employee of IGTBOK org, with separate restrictions and access based on profiles.</p>
<b>Password policies</b>	Individual as per user profile
<b>Licenses</b>	10 Standard Salesforce License use
<b>Task and Activities</b>	<p>Customizable:</p> <p>Donor team: opportunity is created, when a new account or record is created. New donations coming in will come under an opportunity created.</p> <p>Case management of each donation process.</p> <p>Process Team: Activities are setup, any new client activity will give notification, update on survivor, all org member will be notified.</p>

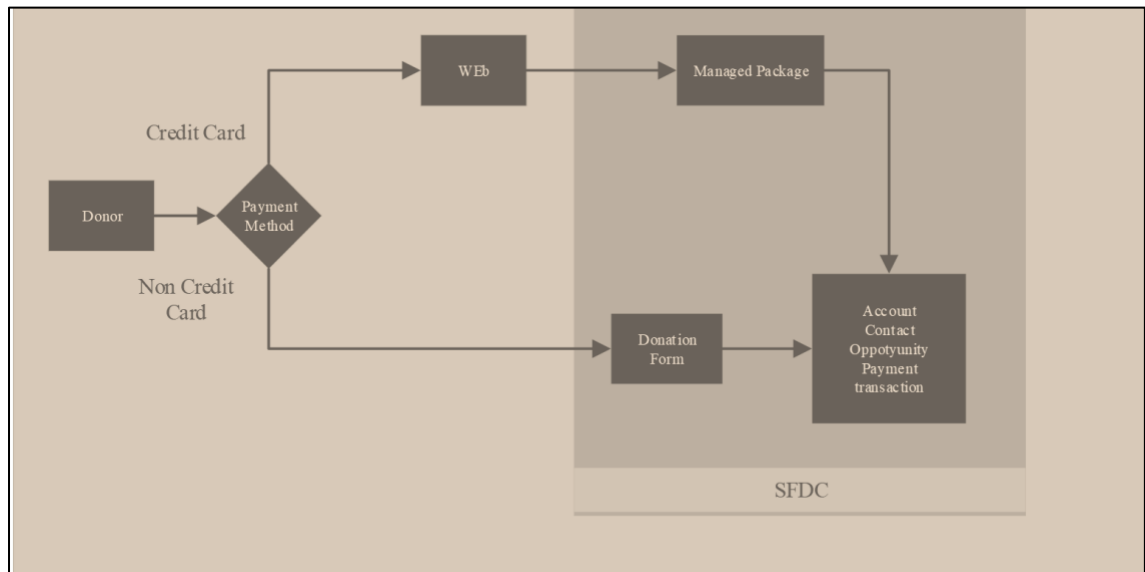


ITEM NAME	DESCRIPTION
Environment used for development	Sandbox, Salesforce Developer Org
Environment prerequisites	Windows 11, Microsoft Excel, Mac OS, Linux
Repository for project	Online mobile application or desktop login
Configuration method	Visualforce Pages, Process Builder, excel
List of reused components	The IGBTOK org.

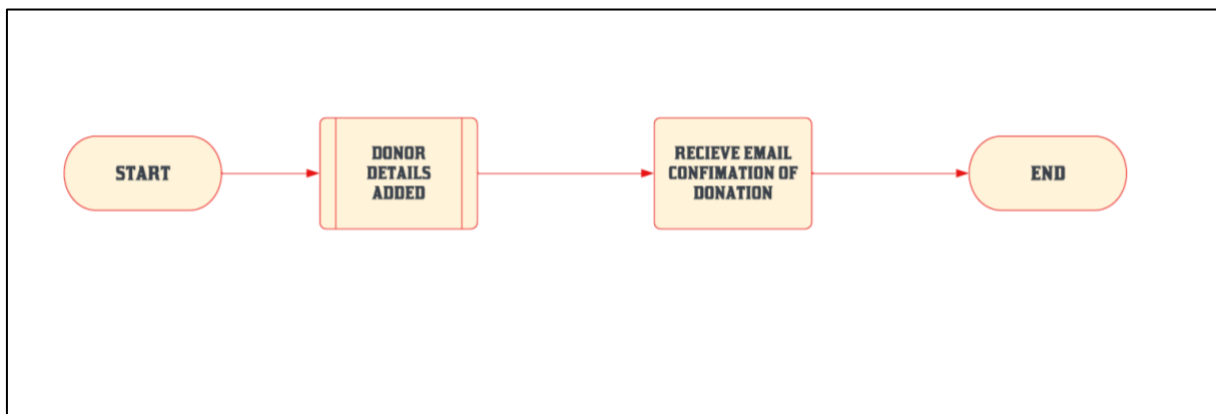
# DONOR PROCESS



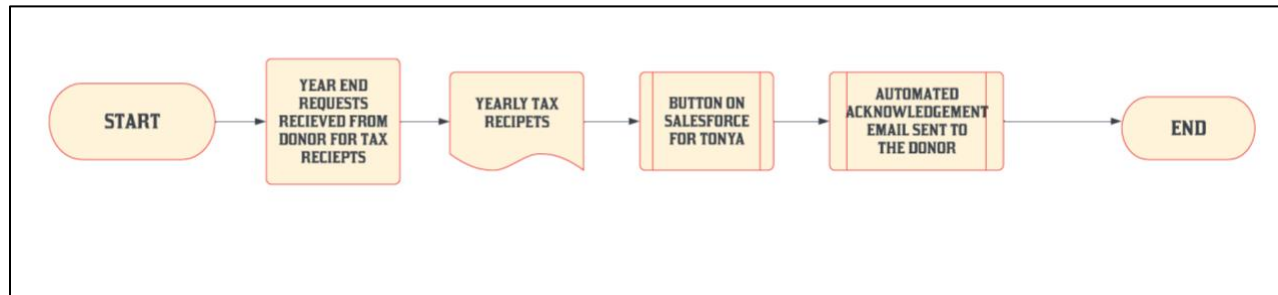
## DONOR PAYMENT FLOW



## ACKNOWLEDGEMENT EMAILS TO DONOR

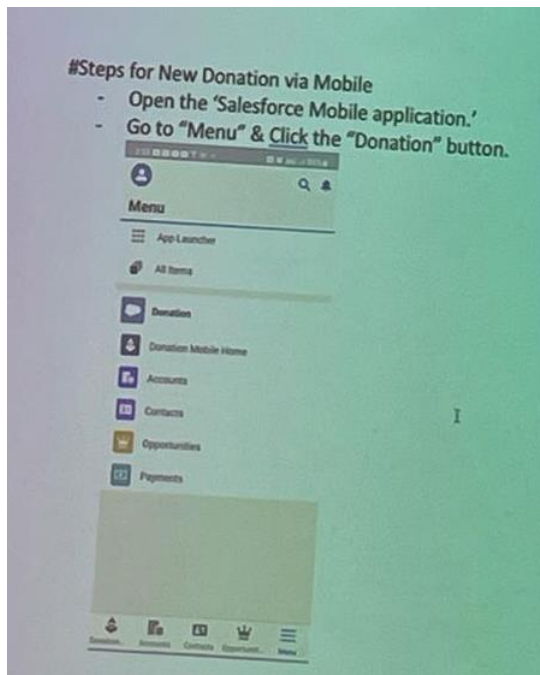


# TAX RECIEPTS FOR DONOR



## PROCESS OF ADDING NEW DONATION FROM MOBILE

STEP 1: OPEN APP > MENU > DONATION > NEW DONATION



## STEP 2: FILL DONATION DETAIL FORM

The screenshot shows a mobile application interface titled "Fill up the Donor details". The app's header bar includes a search icon, a bell icon, and a user profile icon. Below the header, the title "Donation Mobile Home" is displayed. The form contains the following fields:

- First Name:** A text input field with the value "Andy".
- \*Last Name:** A text input field with the value "Test".
- \*Email:** A text input field with the value "a.b@test.com".
- Phone:** A text input field with the value "0123456789".
- Country Origin:** A dropdown menu with "Gala" selected.

A blue "Save" button is located at the bottom right of the form. At the very bottom of the screen, there is a navigation bar with five icons: a home icon, a list icon, a calendar icon, a crown icon, and a menu icon.

## STEP 3: DONATION CREATED

The screenshot shows a confirmation screen titled "Donation Record Created". The app's header bar is consistent with the previous screen. Below the header, the title "Donation Mobile Home" is displayed. The main content area is titled "New Donations" and contains the following text:

You have successfully entered Donation record  
Donation Record: AndyTest Single Payment

At the bottom right, there is a blue "Payment" button.

#### STEP 4: DONOR RECIVES EMAIL CONFIRMATION



**Dear Varun,**

On behalf of the IGTBOK team, I would like to express our heartfelt gratitude for your kind donation! We have attached your official tax receipt to this email.

Your contribution helps us continue our mission of fighting human trafficking and supporting its survivors. We understand the trust you have placed in us to use your donation in the best way possible to make a meaningful impact in the lives of those affected by human trafficking which is a human rights epidemic.

Now and in the future, we hope to continue providing vital resources and hope to those in need.

With best regards,

*Dr. Tonya Stafford Manning*

Dr. Tonya Stafford Manning

It's Going To Be Ok Inc.

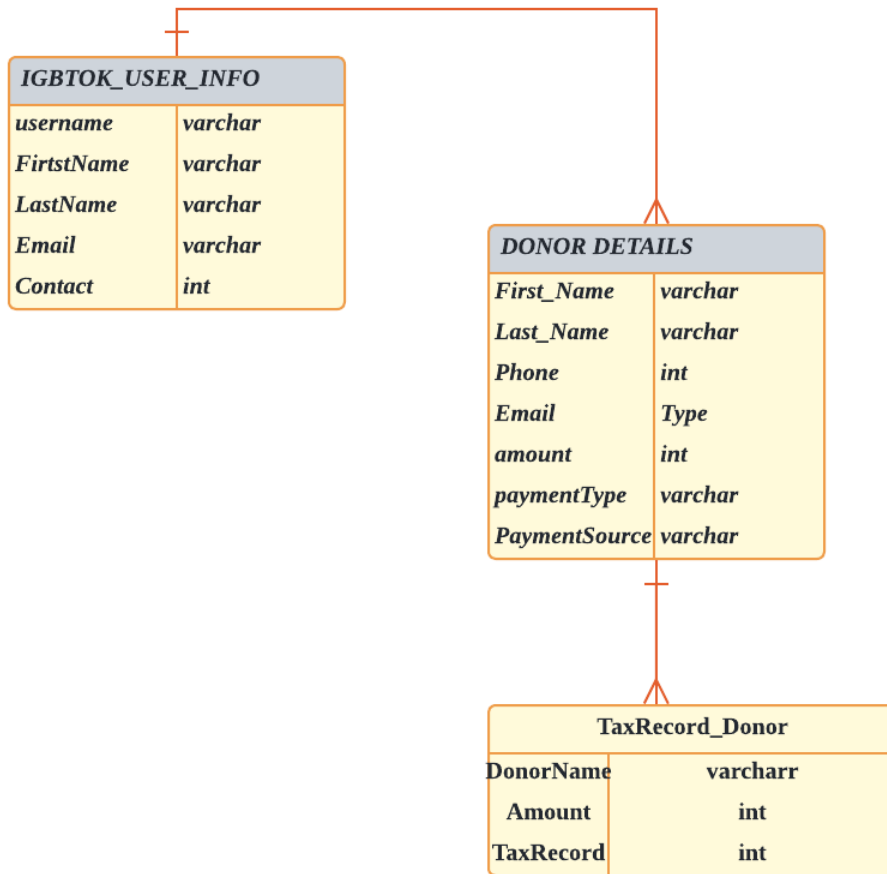
4232 S. Westmorland Rd

[www.igtbok.org](http://www.igtbok.org)

[INFO@IGTBOK.ORG](mailto:INFO@IGTBOK.ORG)

EIN 46-5139883

# SCHEMA



# REPORTS AND DASHBOARD TEAM

Nishchitha Nagaraj led the Reports and Dashboard team, which was responsible for creating dashboards tailored to meet various requirements for Tonya.

The team's objectives ranged from enabling Tonya to track where the donation money was being utilized to identifying the current stage of a client's progress, as well as tracking the total donation amount received during a given year.

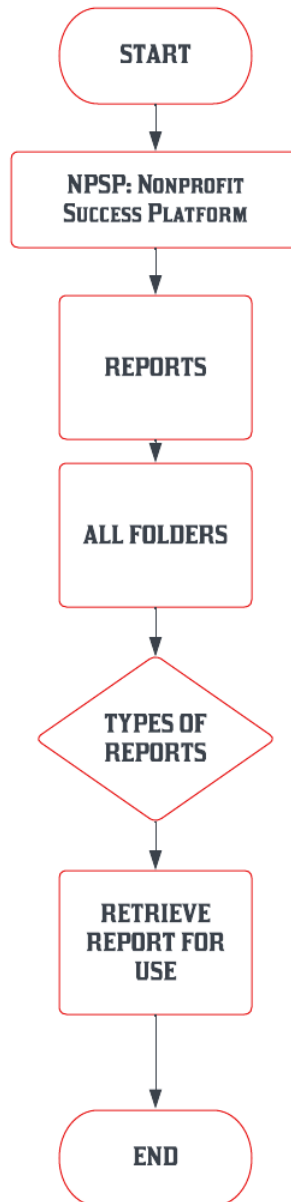
In addition to fulfilling Tonya's immediate needs, the team also had a longer-term vision of creating a report and dashboard that could be utilized in the future for donor outreach or campaign purposes.

By creating a comprehensive dashboard, the team aimed to provide Tonya with a valuable tool that could aid her in decision-making and planning, while also enhancing her ability to communicate with donors and engage in fundraising initiatives.

## TYPES OF REPORTS

1. Donation pledged reports
2. IN-Kind Donation
3. Account LYBUNT report
4. Open Opportunities by stage





Nonprofit Success P...

Getting Started

Home

Accounts

Contacts

Leads

Opportunities

Campaigns

Reports

More

Reports

All Folders > NPSP It's Going To Be Okay 2023

Search all folders...

New Report

New Folder

Settings

6 items

REPORTS	Name	Description	Folder	Created By	Created On	Subscribed
Recent	Closed Won Opportunities by Household	All Closed/Won Opportunities grouped by the giving Household	NPSP It's Going To Be Okay 2023	Joni Bryan	7/27/2018, 8:31 AM	
Created by Me	All Reports		NPSP It's Going To Be Okay 2023	Balaji Vamshi Krishna Katakam	3/5/2023, 12:00 PM	
Private Reports	Organization Donation Report		NPSP It's Going To Be Okay 2023	Balaji Vamshi Krishna Katakam	3/4/2023, 11:47 AM	
Public Reports	Donation Pledged Report		NPSP It's Going To Be Okay 2023	Balaji Vamshi Krishna Katakam	3/4/2023, 5:57 PM	
All Reports	Grant Reports		NPSP It's Going To Be Okay 2023	Balaji Vamshi Krishna Katakam	3/5/2023, 10:57 AM	
FOLDERS	In Kind Donation Reports		NPSP It's Going To Be Okay 2023	Balaji Vamshi Krishna Katakam	3/4/2023, 5:48 PM	

REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

## DONATION PLEDGED REPORTS LAYOUT

Nonprofit Success P...

Getting Started

Home

Accounts

Contacts

Leads

Opportunities

Campaigns

Reports

REPORT

Donation Pledged Report

Opportunities

Outline

Filters 2

Previewing a limited number of records. Run the report to see everything.

Account Name	Opportunity Name	Amount	Contact: Email
A Household (1)	ON1	\$50.00	-
Subtotal		\$50.00	
Anonymous Household (1)	test 1 Donation (1 of 1) 3/4/2023	\$100.00	chand.aditi98@gmail.com
Subtotal		\$100.00	
Apple (4)	Robert	\$566.00	-
	Patric	\$234.00	-
	Nancy	\$565.00	-
	Jack	\$236.00	-
Subtotal		\$1,601.00	
Redcross (2)	David	-	-
	Redcross Donation (2) 3/7/2023	\$1,000.00	-
Subtotal		\$1,000.00	
Shawnee Test (1)	Shawnee Test1	-	shawnee@t.digital
Subtotal		\$0.00	
StateFarm (4)	Daniel	\$500.00	-
	John	\$100.00	-
	Mike	\$100.00	-
	Steve	\$50.00	-
Subtotal		\$750.00	
utd (1)	Aditi's Birthday Pledge	\$500.00	aditrichand173@gmail.com
Subtotal		\$500.00	
Total (14)		\$4,001.00	

Fields

Filters

Add filter...

Show Me All opportunities

Created Date All Time

Opportunity Status Any

Probability All

Stage equals Pledged

Stage Duration greater or equal 1

Nonprofit Success P...				Getting Started	Home	Accounts	Contacts	Leads	Oppo
Report: Opportunities				Donation Pledged Report					
Total Records		Total Amount							
14		\$4,001.00							
<input type="checkbox"/> Account Name	?	<input type="checkbox"/> Opportunity Name		<input type="checkbox"/> Amount		<input type="checkbox"/> Contact: Email			
<input type="checkbox"/> A Household (1)		ON1		\$50.00		-			
Subtotal				\$50.00					
<input type="checkbox"/> Anonymous Household (1)		test 1 Donation (1 of 1) 3/4/2023		\$100.00		chand.aditi98@gmail.com			
Subtotal				\$100.00					
<input type="checkbox"/> Apple (4)		Robert		\$566.00		-			
		Patric		\$234.00		-			
		Nancy		\$565.00		-			
		Jack		\$236.00		-			
Subtotal				\$1,601.00					
<input type="checkbox"/> Redcross (2)		David		-		-			
		Redcross Donation (2) 3/7/2023		\$1,000.00		-			
Subtotal				\$1,000.00					
<input type="checkbox"/> Shawnee Test (1)		Shawnee Test1		-		shawnee@t.digital			
Subtotal				\$0.00					
<input type="checkbox"/> StateFarm (4)		Daniel		\$500.00		-			
		John		\$100.00		-			
		Mike		\$100.00		-			
		Steve		\$50.00		-			
Subtotal				\$750.00					
<input type="checkbox"/> utd (1)		Aditi's Birthday Pledge		\$500.00		aditichand173@gmail.com			
Subtotal				\$500.00					
Total (14)				\$4,001.00					

## GRANT REPORTS

Sandbox: Reports1

Search...

Nonprofit Success P... Getting Started Home Accounts Contacts Leads Opportunities Campaigns Reports More

Report: Opportunities  
**Grant Reports**

Enable Field Editing Add Chart Edit

Total Records: 3 Total Amount: \$5,390.00 Total Requested Amount: \$2,300.00

Account Name	Opportunity Name	Type	Amount	Requested Amount	Grant Requirements Website	Grant Contract Date	Previous Grant/Gift Opportunity
Anonymous Household (1)	Smith	Existing Funding	\$2,390.00	\$800.00	-	3/30/2023	-
Subtotal			\$2,390.00	\$800.00			
BlueCross (2)	Vivek	Existing Funding	\$2,000.00	\$1,000.00	-	3/30/2023	Sharat
	Vikram	Existing Funding	\$1,000.00	\$500.00	-	3/30/2023	-
Subtotal			\$3,000.00	\$1,500.00			
Total (3)			\$5,390.00	\$2,300.00			

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

Search...

Nonprofit Success P... Getting Started Home Accounts Contacts Leads Opportunities Campaigns Reports Recurring Donations Levels Goals Client Safety Question

REPORT Grant Reports Opportunities

Previewing a limited number of records. Run the report to see everything.

Account Name	Opportunity Name	Type	Amount	Requested Amount	Grant Requirements Website	Grant Contract Date	Previous Grant/Gift Opportunity
Anonymous Household (1)	Smith	Existing Funding	\$2,390.00	\$800.00	-	3/30/2023	-
Subtotal			\$2,390.00	\$800.00			
BlueCross (2)	Vikram	Existing Funding	\$1,000.00	\$500.00	-	3/30/2023	-
	Vivek	Existing Funding	\$2,000.00	\$1,000.00	-	3/30/2023	Sharat
Subtotal			\$3,000.00	\$1,500.00			
Total (3)			\$5,390.00	\$2,300.00			

Filters:

- Add filter...
- Show Me: All opportunities
- Created Date: All Time
- Opportunity Status: Closed Won
- Probability: All
- Opportunity Record Type: equals Grant
- Stage: equals Awarded

## IN-KIND DONATION REPORT LAYOUT

Sandbox: Reports1

Nonprofit Success P... Getting Started Home Accounts Contacts Leads Opportunities Campaigns Reports Recurring Donations Levels Goals More

REPORT In Kind Donation Reports Opportunities

Filters

Account Name Opportunity Name Amount Fair Market Value In-Kind Description In-Kind Type

Apple (4)	Peter	\$1,234.00	-	-	-
	William	\$334.00	-	-	-
	Michael	\$789.00	-	-	-
	Andrew	\$856.00	-	-	-
Subtotal		\$3,213.00	\$0.00		
BlueCross (2)	Opportunity In-Kind1	\$500.00	\$400.00	-	Goods
	Inkind2	\$1,458.00	\$500.00	-	Services
Subtotal		\$1,958.00	\$900.00		
Redcross (1)	Nandini	\$50,000.00	\$55,000.00	-	-
Subtotal		\$50,000.00	\$55,000.00		
StateFarm (2)	Harvy	\$400.00	-	-	-
	Rick	\$200.00	-	-	-
Subtotal		\$600.00	\$0.00		
Total (9)		\$55,771.00	\$55,900.00		

lightbox-reports1.sandbox.lightning.force.com/reports/lightningReportApp.a... totals Grand Total Conditional Formatting

Sandbox: Reports1

Nonprofit Success P... Getting Started Home Accounts Contacts Leads Opportunities Campaigns Reports Recurring Donations Levels Goals More

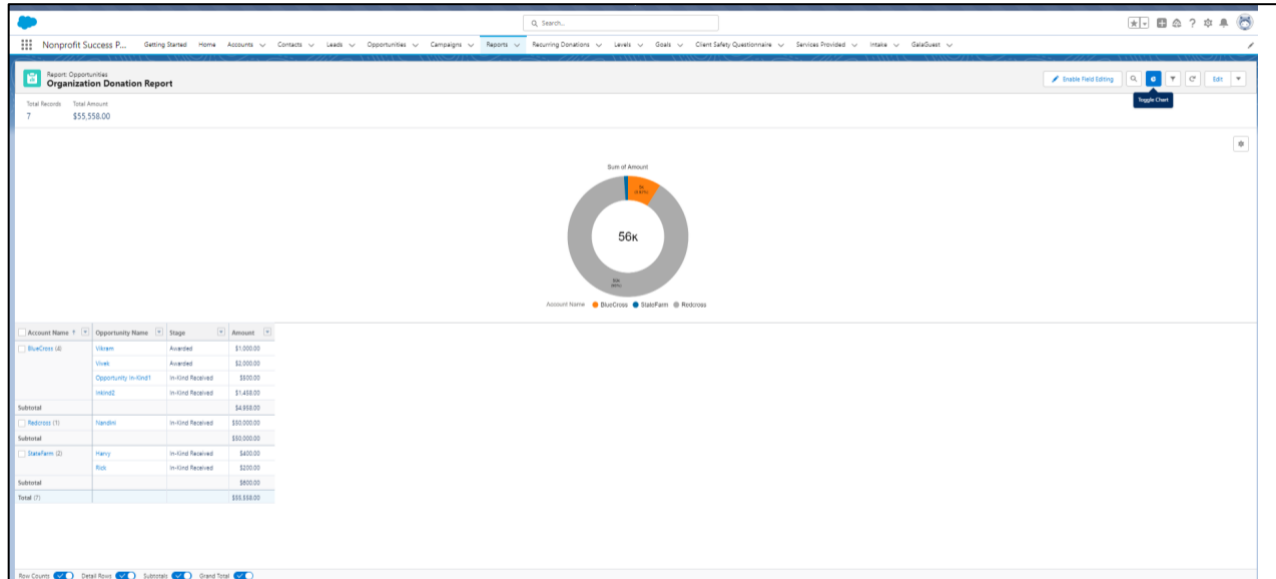
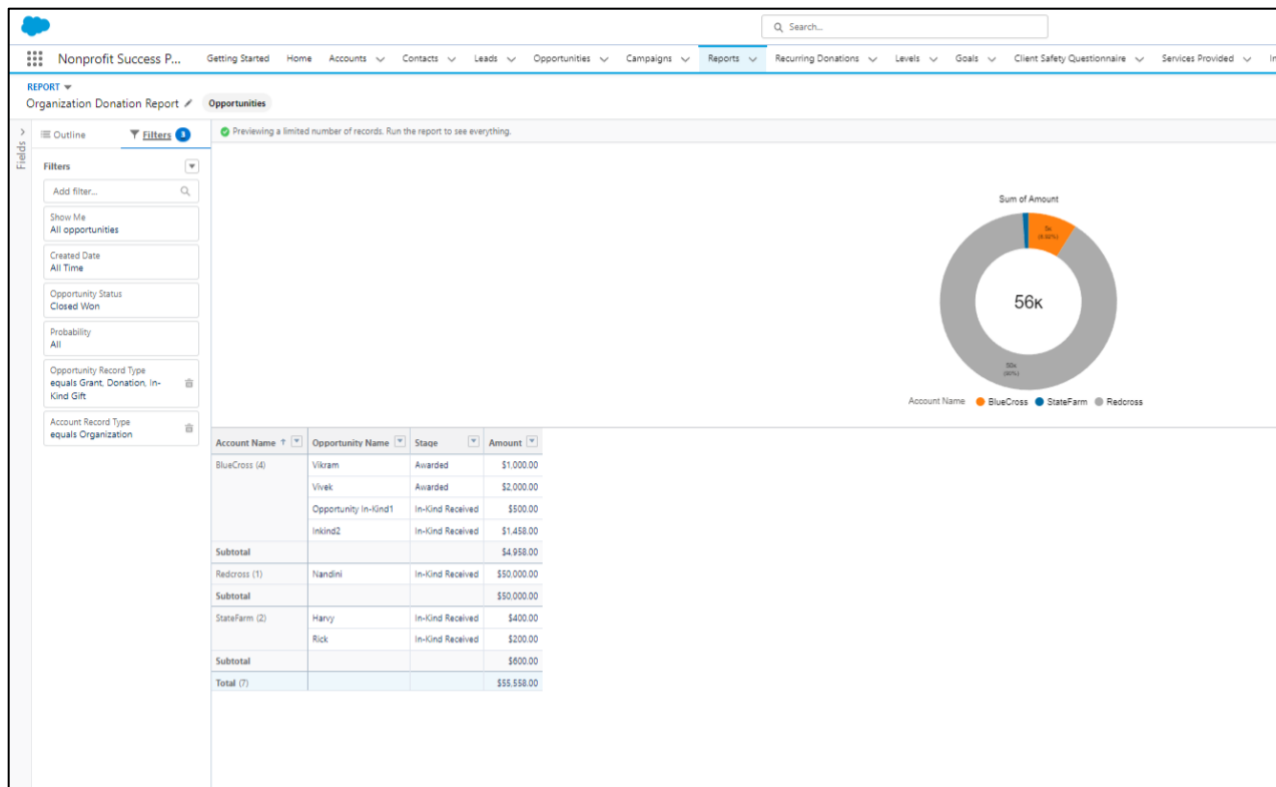
Report: Opportunities

### In Kind Donation Reports

Total Records: 9 Total Amount: \$55,771.00 Total Fair Market Value: \$55,900.00

Account Name	Opportunity Name	Amount	Fair Market Value	In-Kind Description	In-Kind Type
Apple (4)	Peter	\$1,234.00	-	-	-
	William	\$334.00	-	-	-
	Michael	\$789.00	-	-	-
	Andrew	\$856.00	-	-	-
Subtotal		\$3,213.00	\$0.00		
BlueCross (2)	Opportunity In-Kind1	\$500.00	\$400.00	-	Goods
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Subtotal		\$1,958.00	\$900.00		
Redcross (1)	Nandini	\$50,000.00	\$55,000.00	-	-
Subtotal		\$50,000.00	\$55,000.00		
StateFarm (2)	Harvy	\$400.00	-	-	-
	Rick	\$200.00	-	-	-
Subtotal		\$600.00	\$0.00		
Total (9)		\$55,771.00	\$55,900.00		

Row Counts Detail Rows Subtotals Grand Total



# CONCLUSION

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The SSD document contains a wealth of information that is critical to the smooth functioning of the IGTBOK organization. The document outlines the different protocols and operational procedures that are in place, which are essential for members of the organization to understand fully. This includes information on the donor process team, which plays a vital role in the organization's fundraising efforts. The document also provides a comprehensive overview of the reports and dashboard teams, which are responsible for tracking the organization's progress and presenting data in a user-friendly format.

In addition to providing information on specific teams, the SSD document also outlines the overall process flow of the organization. This includes guidelines for utilizing the organization's resources effectively, which is essential for maximizing the impact of the organization's activities. The document also provides detailed instructions on how to navigate the organization's internal processes, which can be complex and time-consuming without proper guidance.

Overall, the SSD document is an invaluable resource for members of the IGTBOK organization. It provides a clear understanding of the organization's structure and operations, which is essential for performing duties efficiently. Tonya and her team, in particular, will find this document immensely beneficial as they work towards achieving the organization's goals. By utilizing the guidelines and procedures outlined in the SSD document, they can maximize the impact of their efforts and contribute to the organization's success.

# REFERENCES

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- <https://docs.google.com/document/d/1ezyjsD0gzOz9CI28-BF6cNRxU4v51VxNypLAGmL7Vr8/edit?pli=1>
- <https://www.igtbok.org>
- [https://docs.google.com/document/d/1jTLEVa9QgS\\_CXqXq8YIXGP8x1bOyD2N\\_/edit](https://docs.google.com/document/d/1jTLEVa9QgS_CXqXq8YIXGP8x1bOyD2N_/edit)
- <https://docs.google.com/presentation/d/11N9d0xBJ2I8lz6g9e-1kvCHN1ScpmxC6/edit#slide=id.p6>
- [https://docs.google.com/document/d/1ao3\\_rXh-5P24q9uXLoixfAqOONa8jx6nUQvlyC0HXkw/edit](https://docs.google.com/document/d/1ao3_rXh-5P24q9uXLoixfAqOONa8jx6nUQvlyC0HXkw/edit)
- [https://docs.google.com/document/d/1IMdRWGCKTL8YWWyDxzt6rB2qRVjc1Ec6aazdIK3VF\\_w/edit](https://docs.google.com/document/d/1IMdRWGCKTL8YWWyDxzt6rB2qRVjc1Ec6aazdIK3VF_w/edit)
- [https://drive.google.com/drive/folders/1DVvLclwd\\_ZUv\\_6RdmghLDW-2PawXJGIa](https://drive.google.com/drive/folders/1DVvLclwd_ZUv_6RdmghLDW-2PawXJGIa)
- <https://www.linkedin.com/in/shawnee-scesney/>
- <https://www.linkedin.com/in/navaidh/>
- <https://www.linkedin.com/in/realpaulmccollum/>
- <https://chat.openai.com/chat> - Paraphrasing and Grammar