NGO Donor & Volunteer Management CRM

Phase 1:

Problem Understanding & Industry Analysis Goal: To understand what challenges NGOs face in managing donors, volunteers, and funds, and how a CRM can make their work easier and more transparent. Requirement Gathering

• "We have so many donors, but we don't have one place to see their history and preferences."

• "We spend hours generating receipts and sending thank-you messages manually."

• "Funds get spread across multiple projects, but it's hard to track exactly where they went."
• "Volunteers sign up to help, but managing their schedules is chaotic."

• "Our donors want to know the impact of their contribution, we need clear reports." So, the system must:

• Track all donors and their donations.

• Generate automated receipts.

• Show where money is being used.

• Manage volunteer records and schedules.

• Produce impact reports that can be shared with donors. Stakeholder Analysis

• Admin: Sets up Salesforce and makes sure everything works smoothly.

• NGO Manager: Wants a big-picture view — which projects are running, how much funding is available, and what outcomes have been achieved.

• Donor Relations Officer: Wants to maintain good relationships with donors, thank them, and encourage them to keep contributing.

• Volunteer Coordinator: Needs to schedule volunteers, assign them to events, and make sure they feel valued.

• Finance Team: Cares about receipts, compliance, and ensuring money is properly allocated.

• Donors: Want to know their money is being used well and transparently.

• Volunteers: Want to contribute their time but need clarity about when, where, and how they are needed.

Business Process Mapping

1. A donor contributes (maybe online, maybe in person).

2. Their details and the donation are logged in the CRM.

3. A receipt is instantly generated and emailed to them, along with a thank-you note.

4. The NGO allocates the donation to a project; for example, “Child Education Drive.”

5. Volunteers are assigned shifts to execute the project.

6. Once the project is done, an impact report (like “200 children received books”) is generated.

7. This report is sent back to the donor, so they feel connected and motivated to support again.

Industry-specific Use Case Analysis

- Donors give money, but they want to see trust and transparency.
- Funds are usually tied to specific causes or campaigns, so tracking is essential.
- Volunteers are as important as funds — without them, projects don’t succeed.
- NGOs must show impact (numbers, stories, outcomes) to survive and grow. AppExchange Exploration There are existing nonprofit apps (like Salesforce Nonprofit Success Pack - NPSP). But for learning, we’ll build a simplified custom CRM with objects for Donors, Volunteers, Donations, Campaigns, and Fund Allocation

Phase 2 :

Step-by-Step: Org Setup & Configuration

(NGO Donor & Volunteer Management CRM)

1. Salesforce Editions — check & pick one

Why: The Salesforce Edition determines what features are available (e.g., Sandboxes, API access, license types).

Steps:

1. Setup → Quick Find → **Company Information**.
2. Look at **Organization Edition** and **User Licenses**.

For learning/practice: Use a **Developer Edition** (free) or Trailhead Playground.
For production NGOs: Consider **Enterprise Edition + Nonprofit Cloud (NPSP)**.

2. Company Profile Setup (Company Information & Org Defaults)

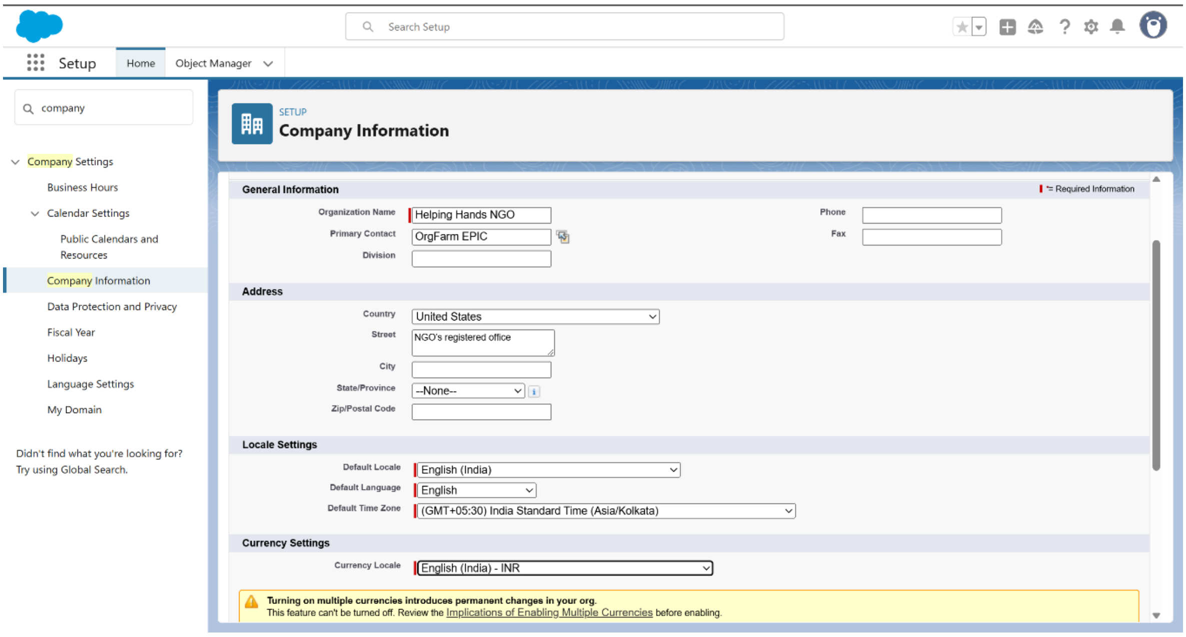
Why: Defines org-level defaults for time zone, currency, locale, and identity.

Steps:

1. Setup → Quick Find → **Company Information** → **Edit**.
2. Fill in:
    - **Company Name** (e.g., *Helping Hands NGO*)
    - **Primary Contact / Phone / Address**
    - **Default Time Zone** → Asia/Kolkata
    - **Locale & Language** → English (India)
    - **Default Currency** → INR

Extras:

- To support multiple currencies: Setup → Company Settings → **Currency Management** (irreversible in production).

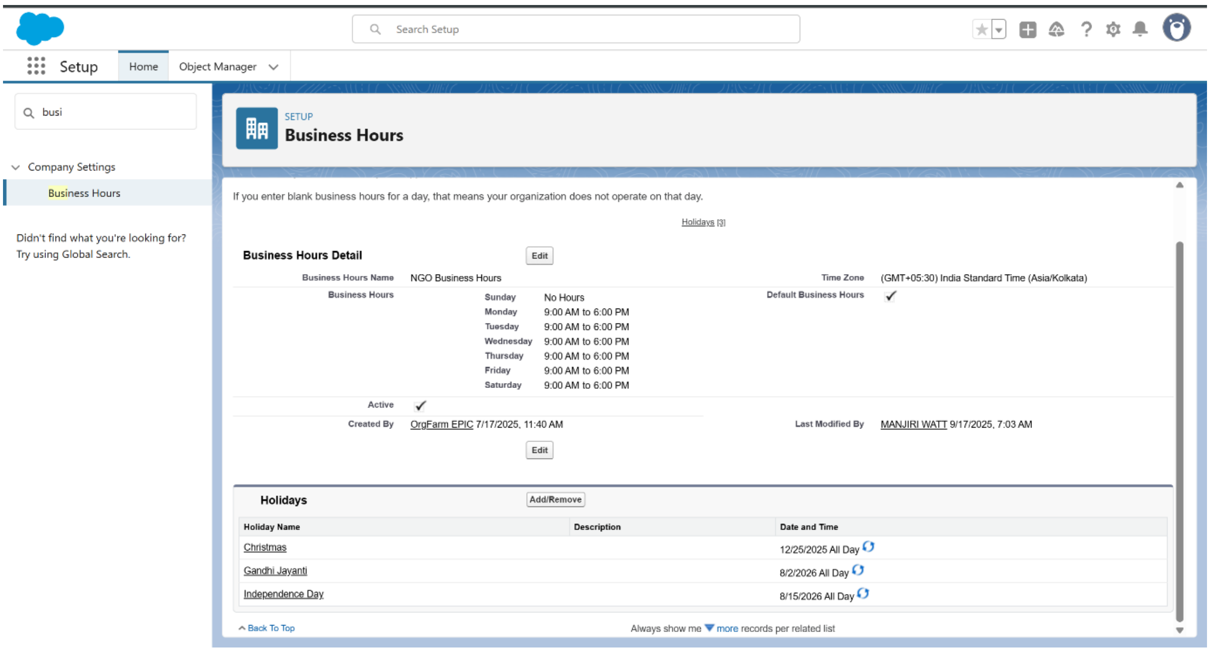


3. Business Hours & Holidays

Why: Used for scheduling volunteers/events and case escalation rules.

Business Hours:

1. Setup → Quick Find → **Business Hours** → **New Business Hours**.
2. Name: "NGO Business Hours", Time Zone = Asia/Kolkata.
3. Define Mon–Sat: 9:00 AM – 6:00 PM; leave Sunday blank.
4. Save.



Holidays:

1. Setup → Quick Find → **Holidays** → **New Holiday**.
2. Add “Independence Day” (15 Aug), “Gandhi Jayanti” (2 Oct), etc. → **Save**.
3. Open each holiday → **Add Business Hours** → assign “NGO Business Hours”.

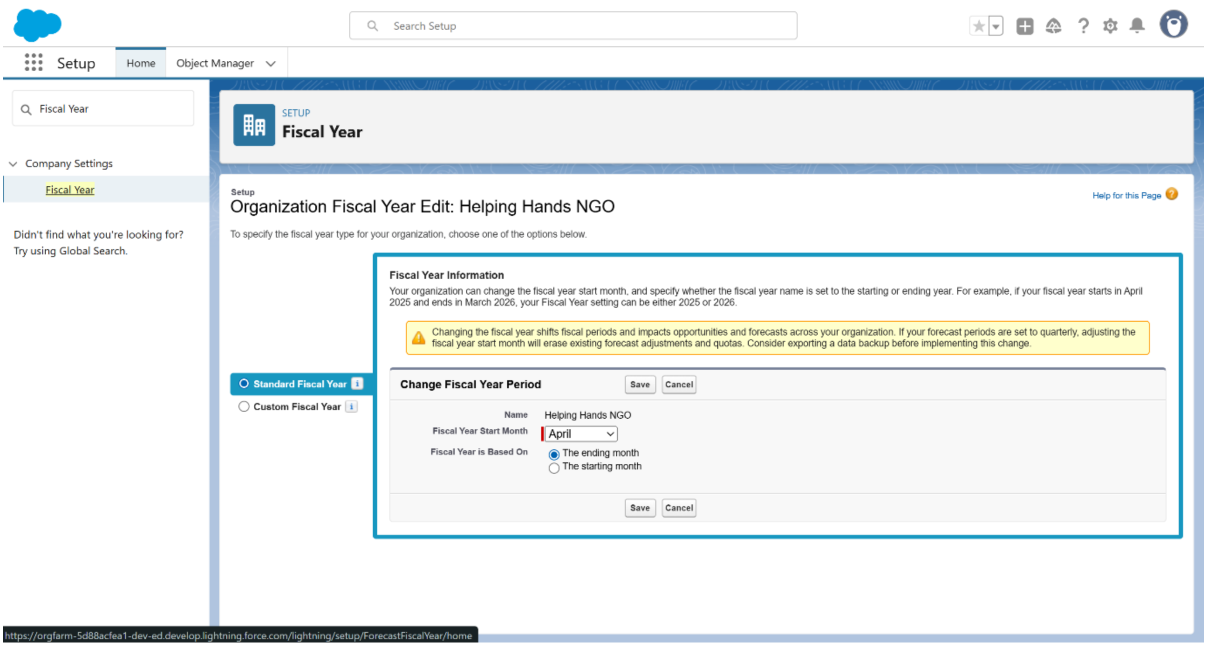
4. Fiscal Year Settings

Why: Ensures reporting and rollups follow your NGO’s fiscal calendar.

Salesforce names fiscal years by the year they **end** (e.g., Apr 2025–Mar 2026 = FY2026).

Steps:

1. Setup → Quick Find → **Fiscal Year**.
2. Choose **Standard Fiscal Year**.
3. Set **Start Month = April** (India).
4. Save.



5. User Setup & Licenses

Why: Users need accounts with licenses and roles to access the system.

Create User:

1. Setup → Quick Find → **Users** → **New User**.
2. Fill:

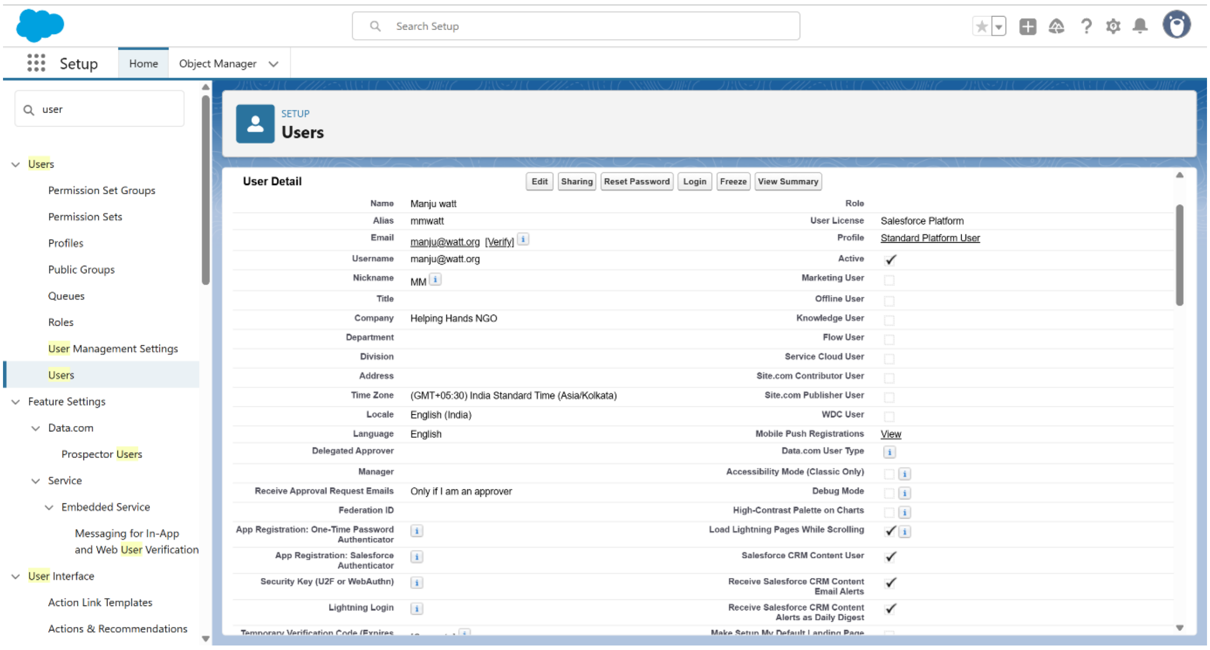
- Name, Email, Username (must be unique across Salesforce).
- License (Salesforce / Platform / Chatter Free).
- Profile (choose from available).
- Role (assign later if roles are set up).

3. Save.

Check Licenses: Setup → Company Information → **User Licenses** (used vs available).

Example Mapping for NGO:

- NGO Manager → Salesforce License + NGO Manager Profile
- Finance Officer → Salesforce License + Finance Profile
- Volunteers → Platform / Chatter Free + Volunteer Profile



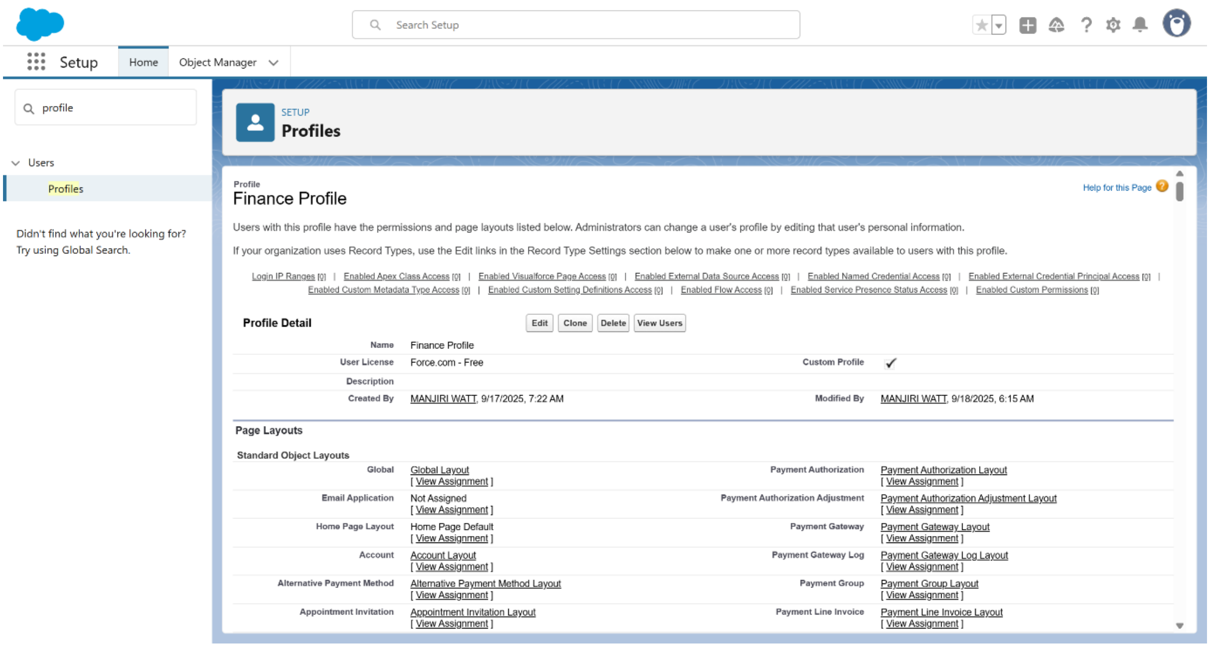
6. Profiles — Create & Configure

Why: Profiles control object, field, and system permissions.

Steps:

1. Setup → Profiles → choose a standard profile → **Clone**.

2. Name (e.g., Finance Profile) → Save.



3. Edit **Object Settings**: Donations → check Read/Create/Edit/Delete as required.
4. Adjust **Field-Level Security** to hide sensitive donor info.
5. Configure **Tab Settings** (Default On/Off/Hidden) and **Assigned Apps**.
6. Set **System Permissions** (e.g., Export Reports).
7. (Optional) Restrict with **Login Hours / IP Ranges**.
8. Assign to users via User record.

7. Roles — Data Visibility Hierarchy

Why: Controls who can see records owned by others. Higher roles inherit access.

Steps:

1. Setup → Roles → **Set Up Roles**.
2. Click **Add Role** under a parent.
   - Executive Director (top role)
   - NGO Manager → Finance Officer, Donor Relations Officer, Volunteer Coordinator → Volunteers.
3. Save and assign users.

8. Permission Sets — Grant Extra Access

Why: Add permissions without cloning/editing profiles.

Steps:

1. Setup → Permission Sets → **New**.
2. Label & API Name → Save.
3. Add Object Settings, Field Permissions, or System Permissions.
    - Example: "Export Reports Access" → grant only to Finance users.
4. Assign users → **Manage Assignments** → Add.

9. OWD (Organization-Wide Defaults)

Why: Defines baseline visibility for each object.

Steps:

1. Setup → Sharing Settings → **Edit OWD**.
2. Set:
    - Donors (Contacts) = Private
    - Donations (Custom Object) = Private
    - Volunteers = Public Read/Write
    - Campaigns = Public Read Only
3. Save.

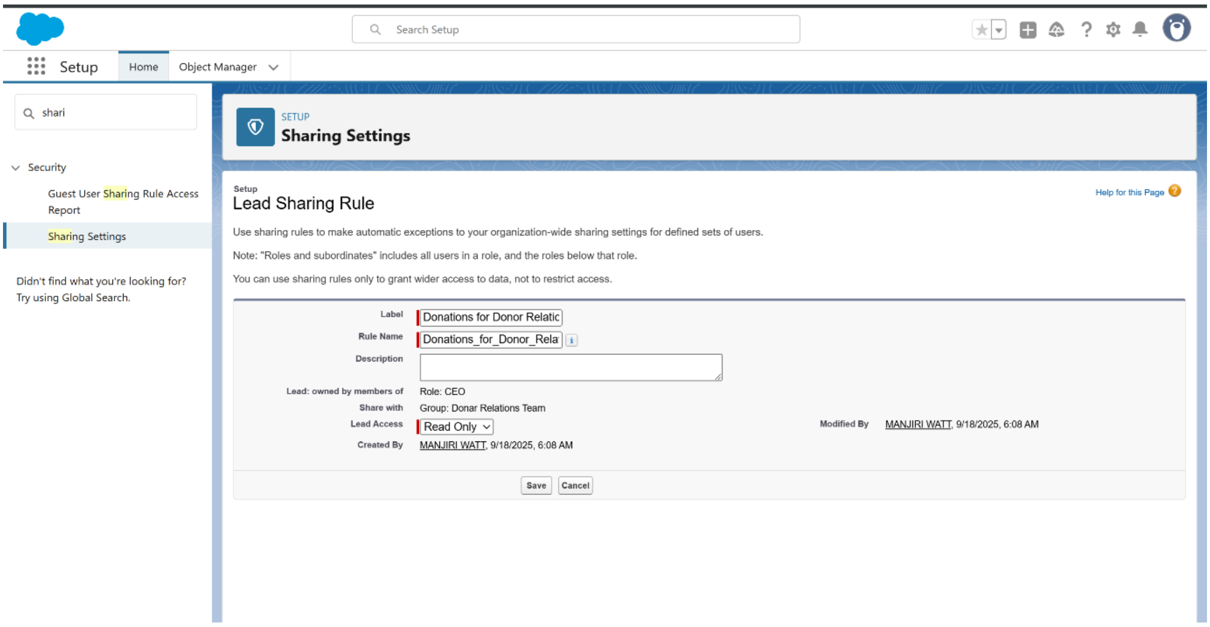
10. Sharing Rules

Why: Open up access beyond OWD (e.g., team-wide visibility).

Steps:

1. Setup → Sharing Settings → scroll to object → **New Sharing Rule**.
2. Select **Owner-Based** or **Criteria-Based**.
3. Define which records to share → with which Roles/Groups → and at what Access Level.
4. Save.

Create Public Groups: Setup → Public Groups → **New** → add Users/Roles.

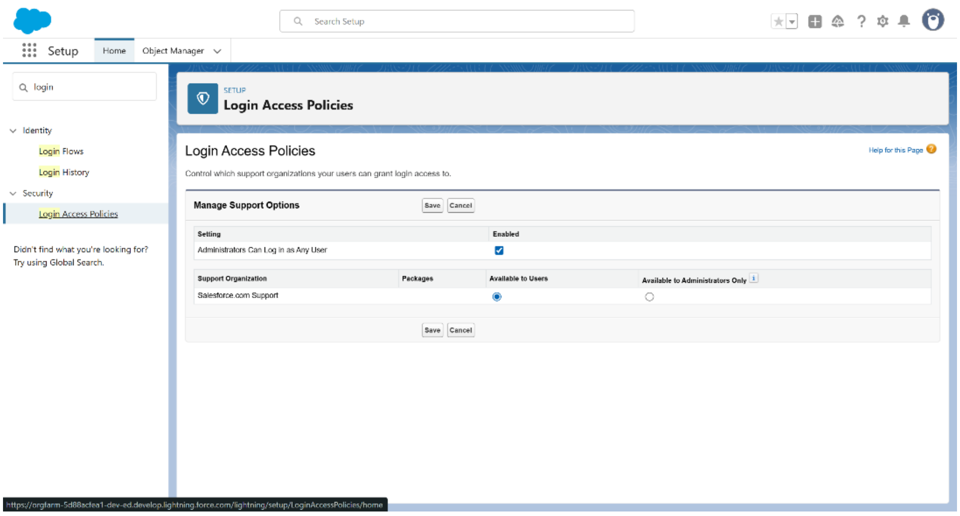


11. Login Access Policies & Security

Why: Control when/how users log in and enable admin support.

Steps:

1. Setup → Login Access Policies → enable **Administrators can log in as any user**.
2. In Profiles → set **Login Hours / IP Ranges** as needed.
3. Setup → Session Settings → configure session timeout & HTTPS.



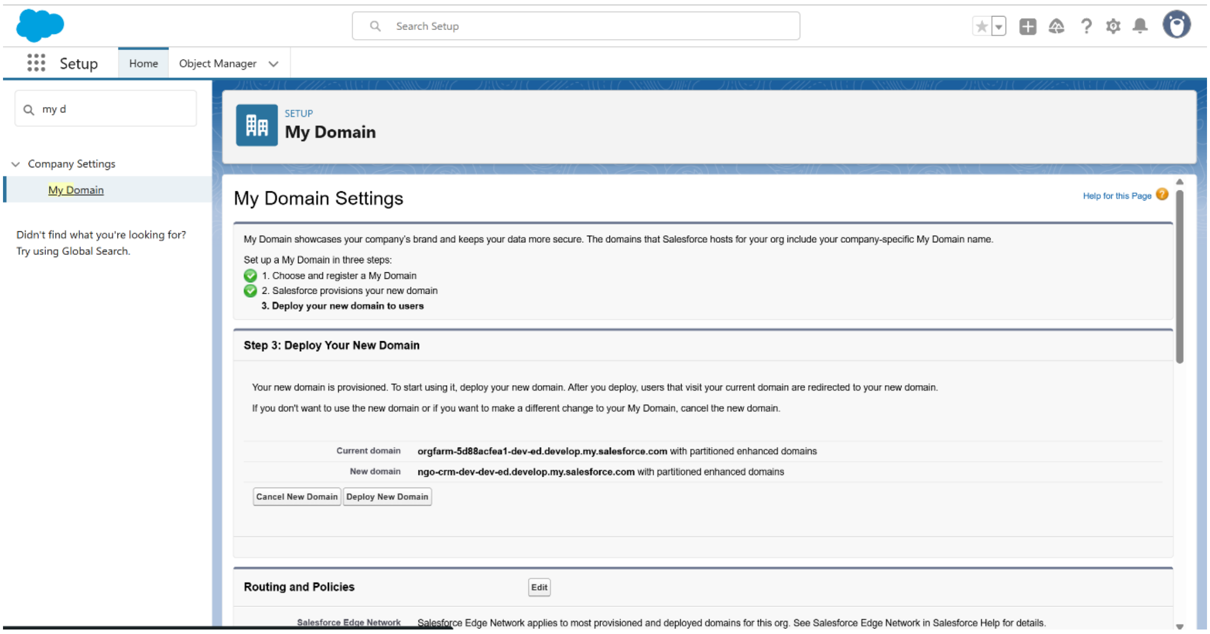
4. Setup → Multi-Factor Authentication → enforce MFA for all.

12. Dev Org Setup

Why: Build/test safely without touching Production.

Steps:

1. Sign up at developer.salesforce.com or use Trailhead Playground.
2. Setup → My Domain → register & deploy a unique domain.
3. Setup → Dev Hub → enable (if using Scratch Orgs).
4. Optional: AppExchange → install **Nonprofit Success Pack (NPSP)**.

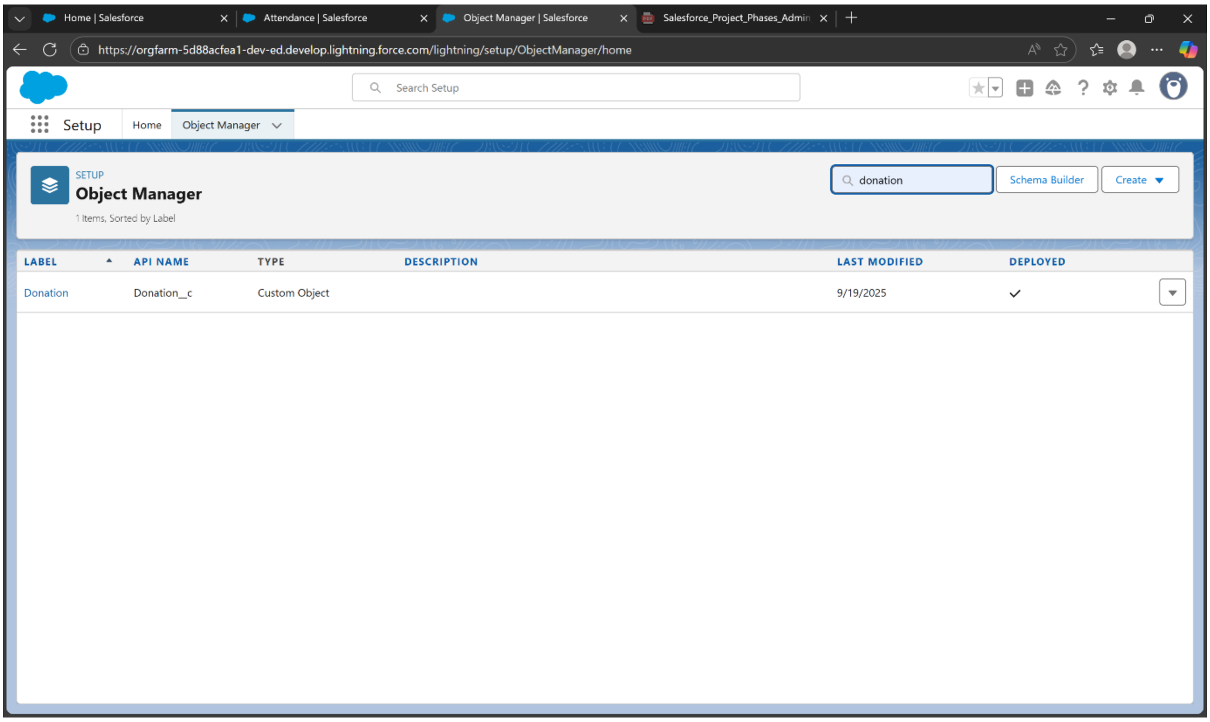


Note: Developer Edition has limited users and no sandboxes.

Phase 3: Data Modeling & Relationships

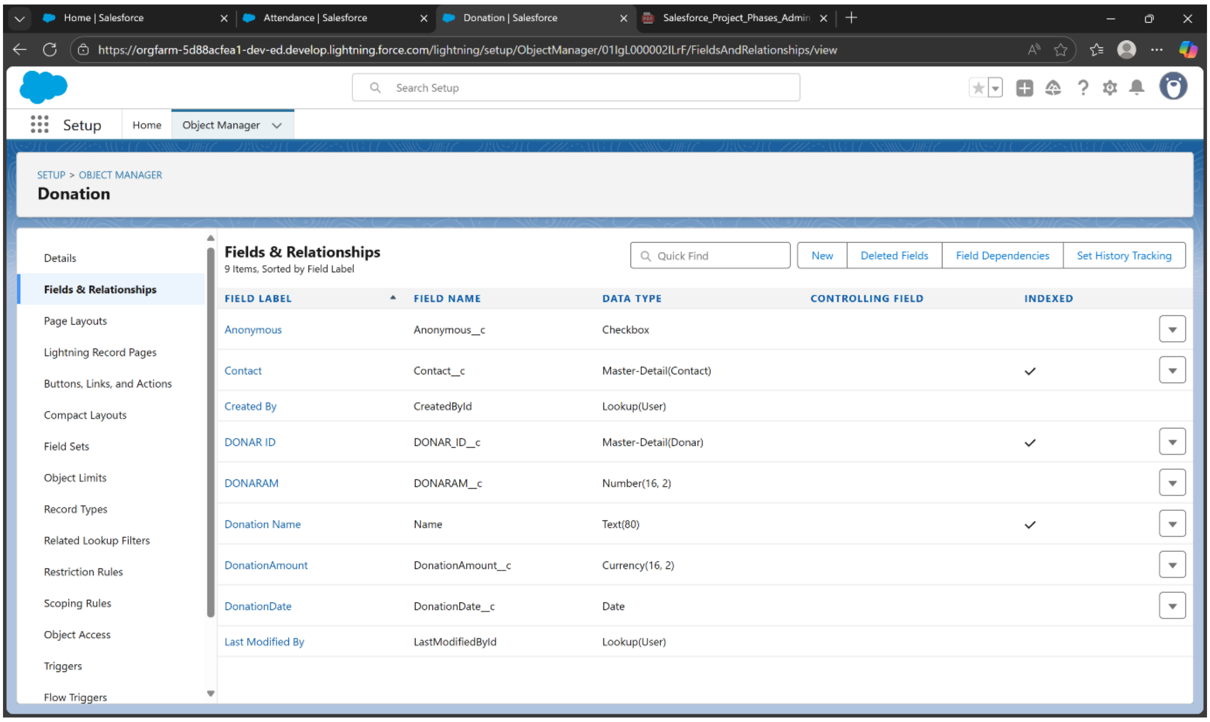
1) Standard & Custom Objects

- **Standard Objects**: Already in Salesforce (Account, Contact, Campaign, Opportunity).
- **Custom Objects**: You create your own (e.g., Donation, Volunteer, Program).
  Setup → **Object Manager** → **Create → Custom Object**.



2) Fields

- Add data points like Amount, Date, Status.
- Example: On Donation create a field Donation Amount (Currency).
  Object Manager → pick object → **Fields & Relationships → New**.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Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
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9 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Anonymous
Anonymous__c
Checkbox
Contact
Contact__c
Master-Detail(Contact)
Created By
CreatedById
Lookup(User)
DONAR ID
DONAR_ID__c
Master-Detail(Donar)
DONARAM
DONARAM__c
Number(16, 2)
Donation Name
Name
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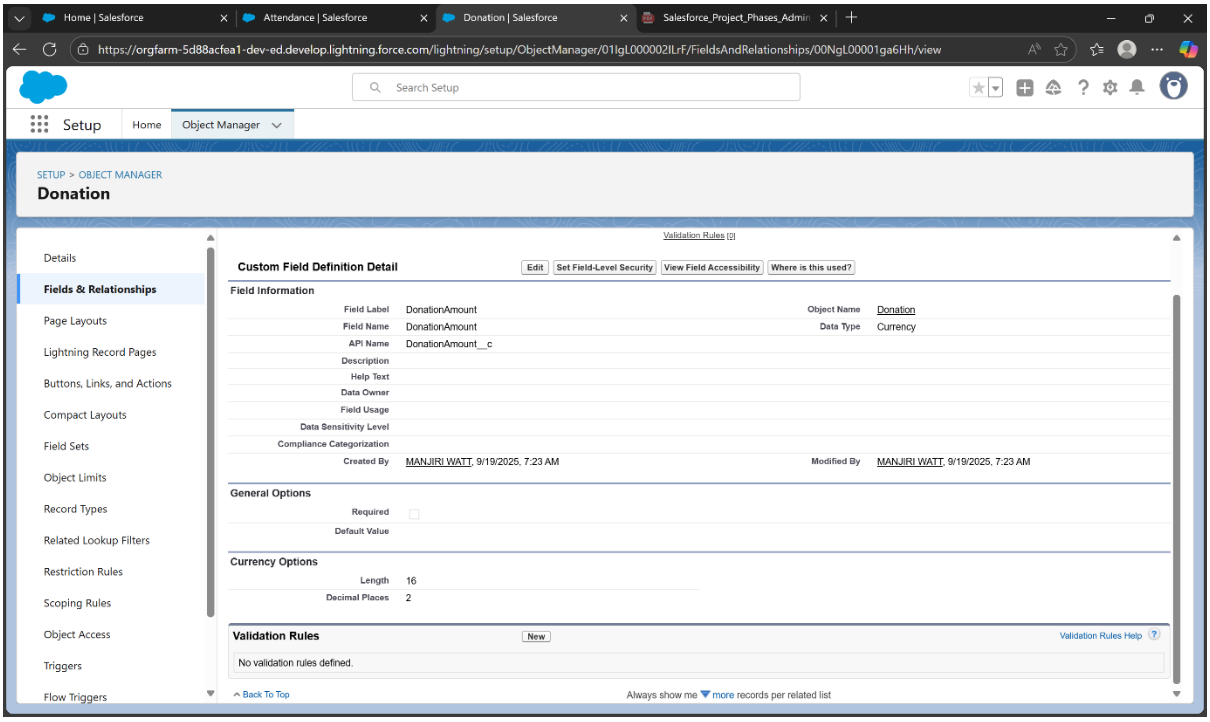
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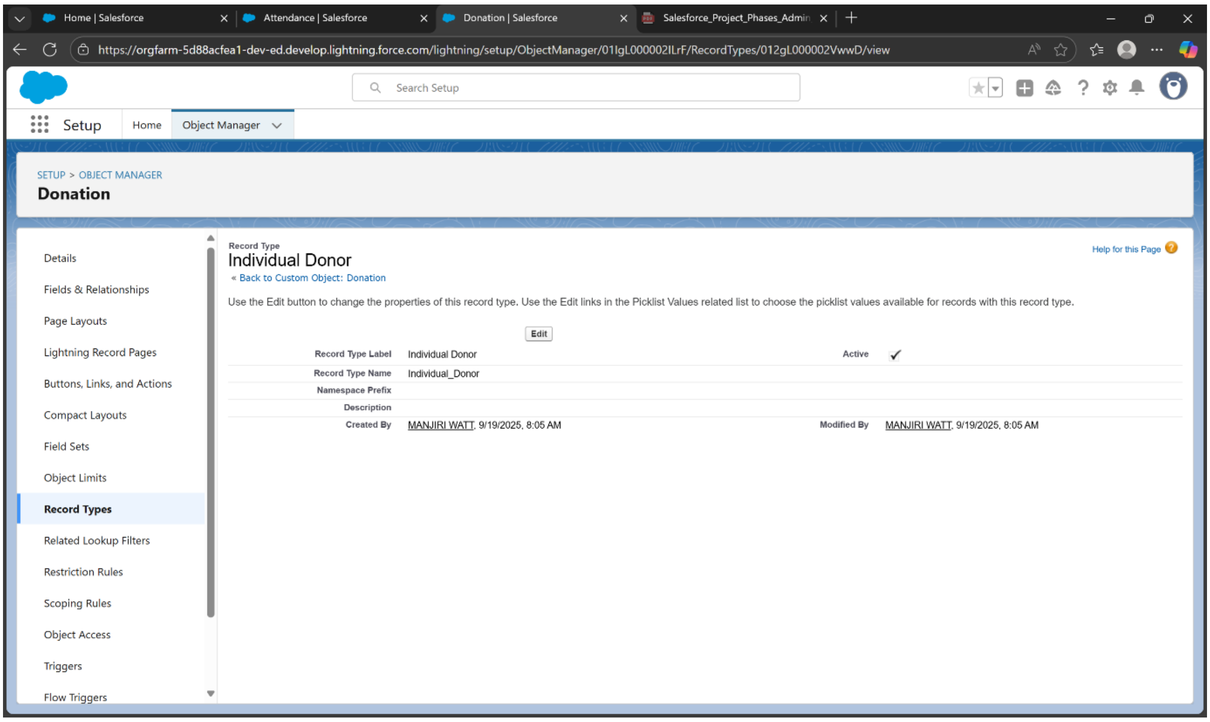
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label DonationAmount
Object Name Donation
Field Name DonationAmount
Data Type Currency
API Name DonationAmount__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By MANJIRI WATT, 9/19/2025, 7:23 AM
Modified By MANJIRI WATT, 9/19/2025, 7:23 AM
General Options
Required
Default Value
Currency Options
Length 16
Decimal Places 2
Validation Rules
New
Validation Rules Help
No validation rules defined.
Back To Top
Always show me more records per related list

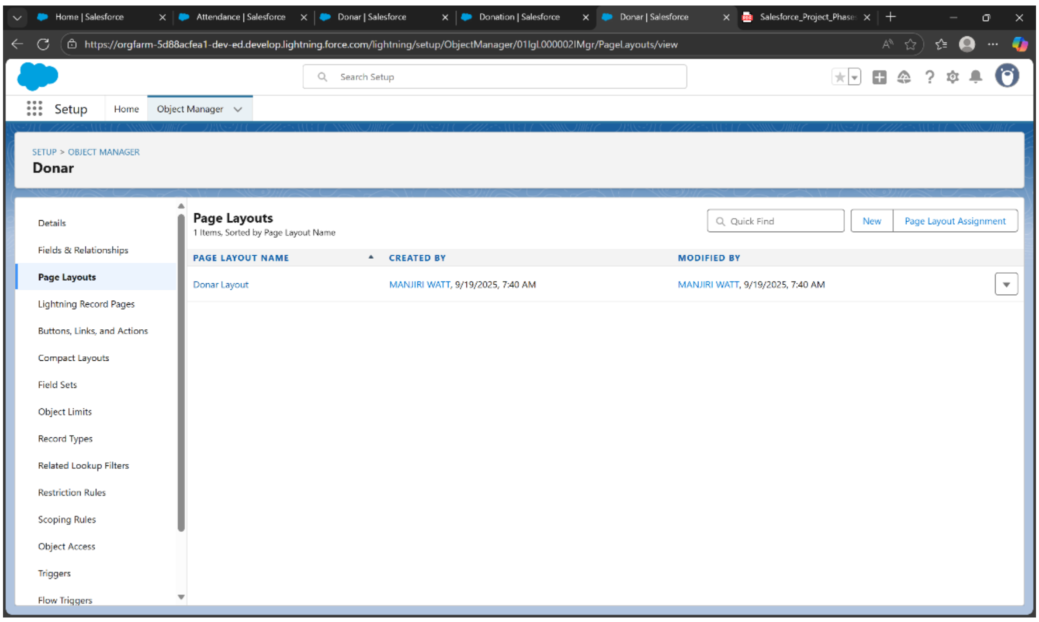
3) Record Types

- Let you separate processes/layouts within one object.
- Example: Contact = Individual Donor vs Institutional Donor.
  Object Manager → pick object → **Record Types → New**.



4) Page Layouts

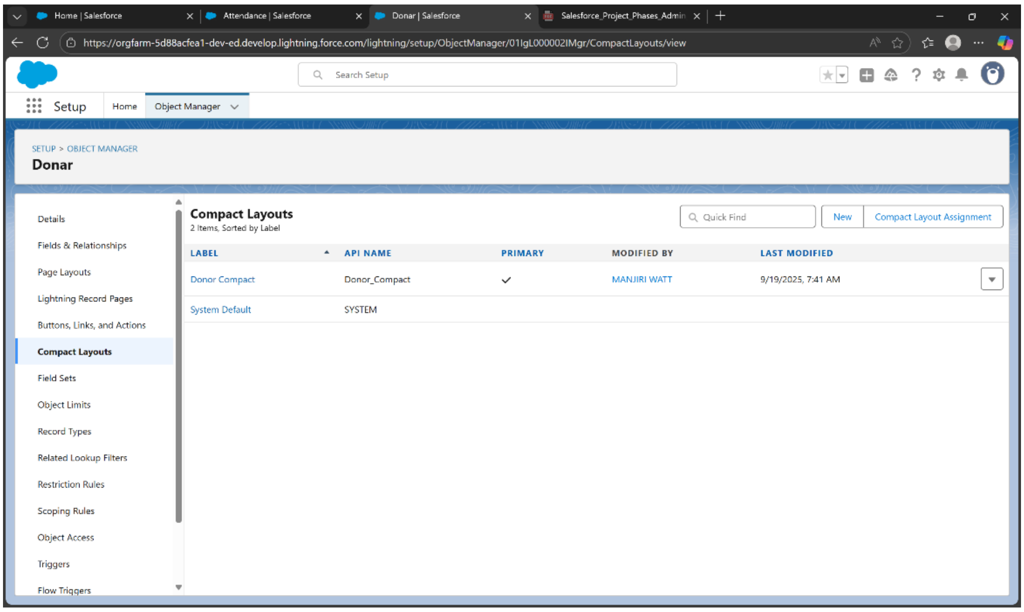
- Control which fields/sections show on a record page.
- Example: Individual Donor layout hides company fields, Institutional layout shows them.



Object Manager → pick object → **Page Layouts → Edit/New**.

5) Compact Layouts

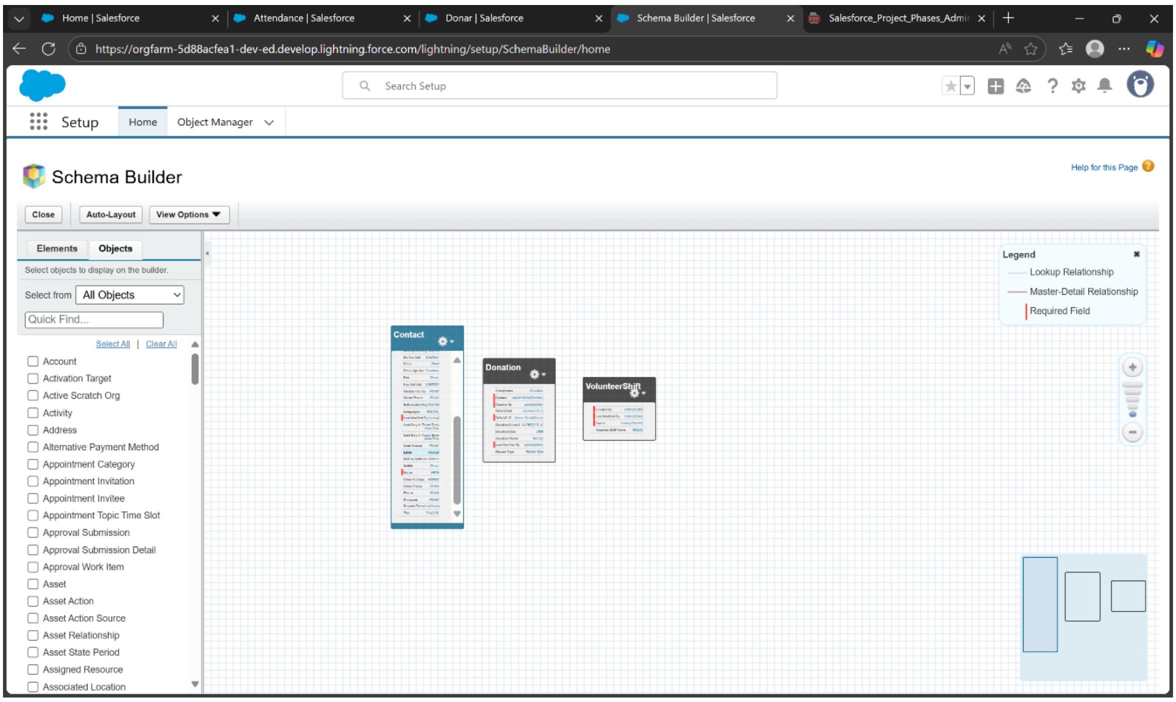
- Control fields shown in the record header & Salesforce mobile.
- Example: Show Name, Email, Phone for Donor at top.
  Object Manager → pick object → **Compact Layouts → New**.



6)

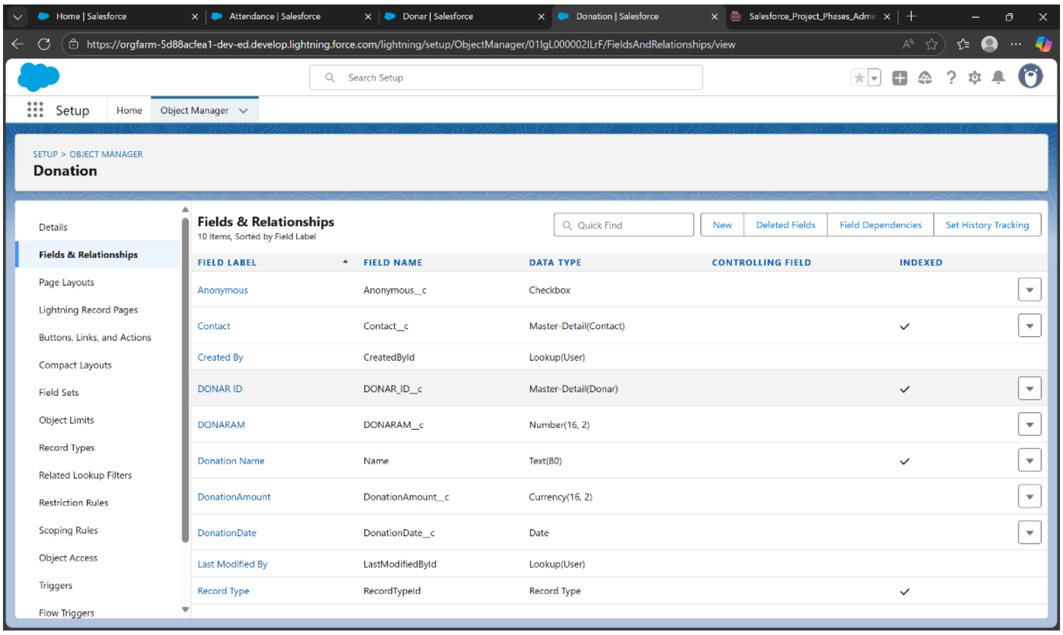
Schema Builder

- Visual, drag-and-drop view of all objects and fields.
- Useful for seeing relationships at once.
  Setup → search **Schema Builder**.



7) Lookup vs Master-Detail vs Hierarchical Relationships

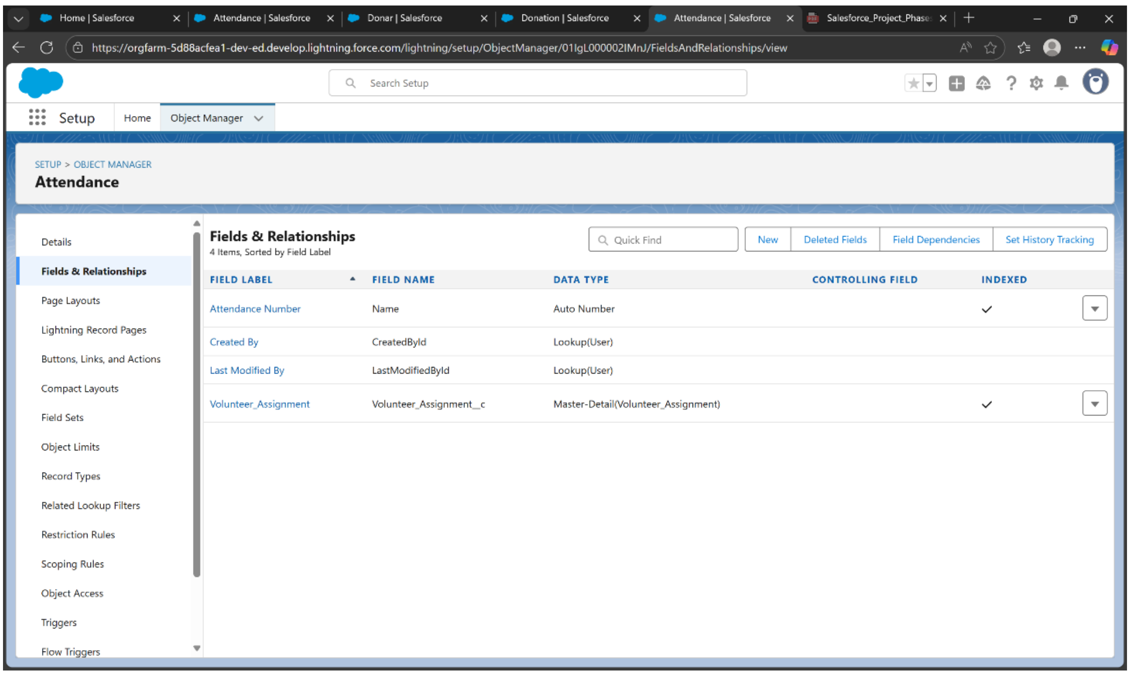
- **Lookup**: Loose link (child can exist alone). Ex: Donation → Donor.
- **Master-Detail**: Tight link (child depends on parent, rollups possible). Ex: Attendance → Event.



- **Hierarchical**: Only on User object (manager relationships).
  Object Manager → Fields → New → choose relationship type.

8) Junction Objects

- Used for many-to-many.
- Example: Attendance links Volunteers ↔ Events.
  Create custom object with two **Master-Detail** fields.



9) External Objects

- Bring in data stored outside Salesforce (via Salesforce Connect).
- Example: Link external donor DB without importing all records.
  Setup → search **External Data Sources** → New → Validate & Sync.