

# 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)

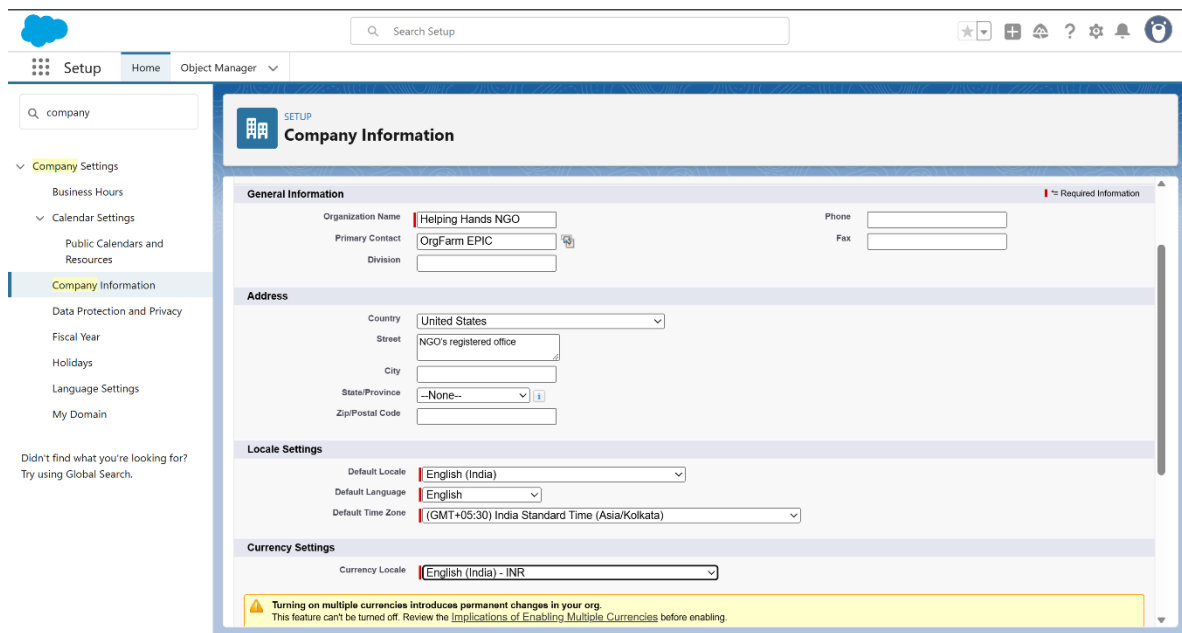
**Why:** Defines org-level defaults for time zone, currency, locale, and identity.

##### 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).



**Company Information**

**General Information**

Organization Name: Helping Hands NGO  
 Primary Contact: OrgFarm EPIC  
 Division:   
 Phone:   
 Fax:

**Address**

Country: United States  
 Street: NGO's registered office  
 City:   
 State/Province: --None--  
 Zip/Postal Code:

**Locale Settings**

Default Locale: English (India)  
 Default Language: English  
 Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)

**Currency Settings**

Currency Locale: English (India) - INR

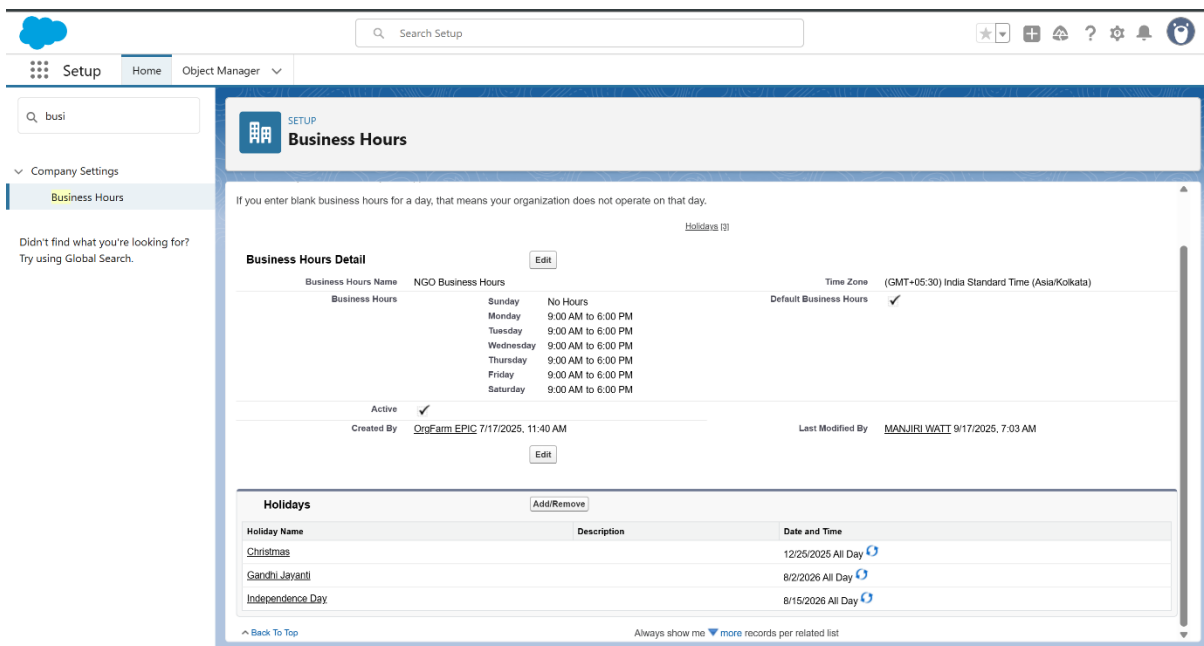
Turning on multiple currencies introduces permanent changes in your org. This feature can't be turned off. Review the implications of Enabling Multiple Currencies before enabling.

### 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.



**Business Hours**

If you enter blank business hours for a day, that means your organization does not operate on that day.

**Business Hours Detail**

Business Hours Name: NGO Business Hours  
 Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)  
 Default Business Hours: ☒

Business Hours	Business Hours
Sunday	No Hours
Monday	9:00 AM to 6:00 PM
Tuesday	9:00 AM to 6:00 PM
Wednesday	9:00 AM to 6:00 PM
Thursday	9:00 AM to 6:00 PM
Friday	9:00 AM to 6:00 PM
Saturday	9:00 AM to 6:00 PM

Active: ☒  
 Created By: OrgFarm EPIC 7/17/2025, 11:40 AM  
 Last Modified By: MANJIRI WATT 9/17/2025, 7:03 AM

**Holidays**

Holiday Name	Description	Date and Time
Christmas		12/25/2025 All Day
Gandhi Jayanti		8/2/2026 All Day
Independence Day		8/15/2026 All Day

**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**.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "Fiscal Year" entered. Below it, "Company Settings" is expanded, and "Fiscal Year" is selected. The main content area is titled "Organization Fiscal Year Edit: Helping Hands NGO". It includes a "Fiscal Year Information" section with a warning about changing the fiscal year. Below this is a "Change Fiscal Year Period" dialog box. In the dialog, the "Name" is "Helping Hands NGO", the "Fiscal Year Start Month" is set to "April", and "Fiscal Year is Based On" is set to "The ending month". There are "Save" and "Cancel" buttons at the bottom of the dialog.

#### 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

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with the following items: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, Prospector Users, Service, Embedded Service, Messaging for In-App and Web User Verification, User Interface, Action Link Templates, and Actions & Recommendations. The main content area is titled 'Users' and shows the 'User Detail' for a user named 'Manju watt'. The user's email is 'manju@watt.org', username is 'manju@watt.org', and nickname is 'MM'. The user is assigned the 'Salesforce Platform' license and the 'Standard Platform User' profile. The 'Active' checkbox is checked. The 'Manager' field is set to 'Only if I am an approver'. The 'Delegated Approver' field is set to 'Manager'. The 'App Registration: Salesforce Authenticator' field is set to 'Salesforce CRM Content User'. The 'Security Key (U2F or WebAuthn)' field is set to 'Receive Salesforce CRM Content Email Alerts'. The 'Lightning Login' field is set to 'Receive Salesforce CRM Content Alerts as Daily Digest'.

## 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.

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar has a search bar with 'profile' and a 'Users' dropdown menu. The main content area is titled 'Finance Profile' and includes a description: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.' Below this is a 'Profile Detail' section with buttons for 'Edit', 'Clone', 'Delete', and 'View Users'. The details include: Name: Finance Profile, User License: Force.com - Free, Custom Profile: checked, Description: (empty), Created By: MANJIRI WATT, 9/17/2025, 7:22 AM, Modified By: MANJIRI WATT, 9/18/2025, 6:15 AM. The 'Page Layouts' section is a table with two columns: 'Standard Object Layouts' and 'Page Layouts'. The table lists various layouts and their assignments.

Standard Object Layouts	Page Layouts
Global	Global Layout [View Assignment]
Payment Authorization	Payment Authorization Layout [View Assignment]
Email Application	Not Assigned [View Assignment]
Payment Authorization Adjustment	Payment Authorization Adjustment Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]
Payment Gateway	Payment Gateway Layout [View Assignment]
Account	Account Layout [View Assignment]
Payment Gateway Log	Payment Gateway Log Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]
Payment Group	Payment Group Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]
Payment Line Invoice	Payment Line Invoice Layout [View Assignment]

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

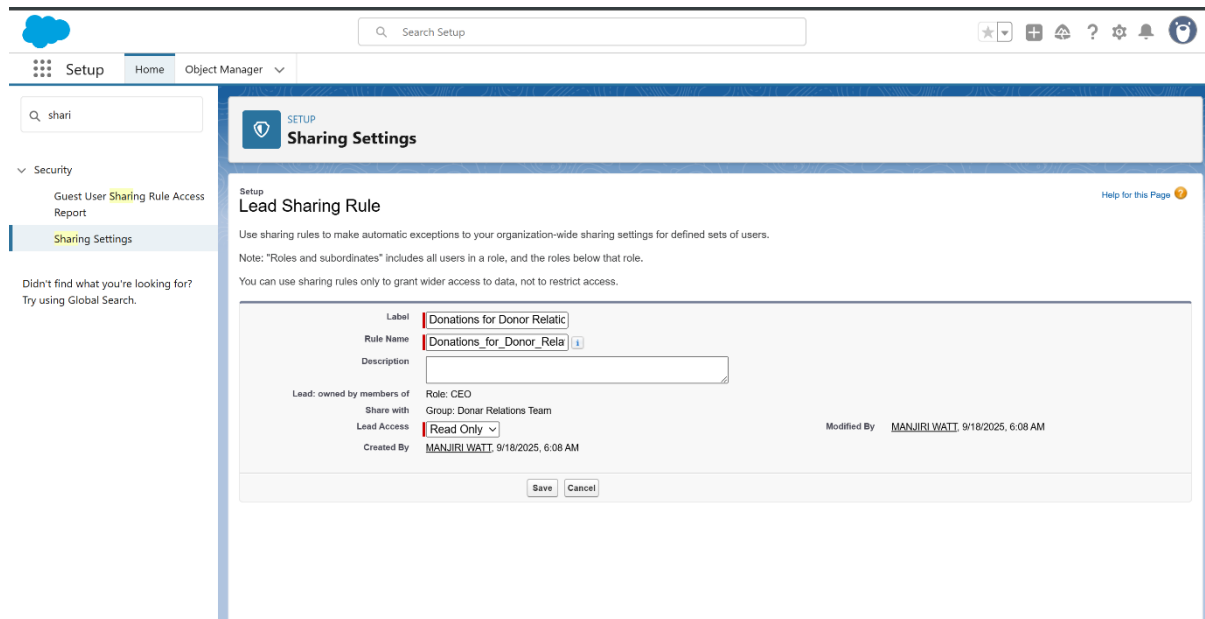
**Why:** Open up access beyond OWD (e.g., team-wide visibility).

**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.



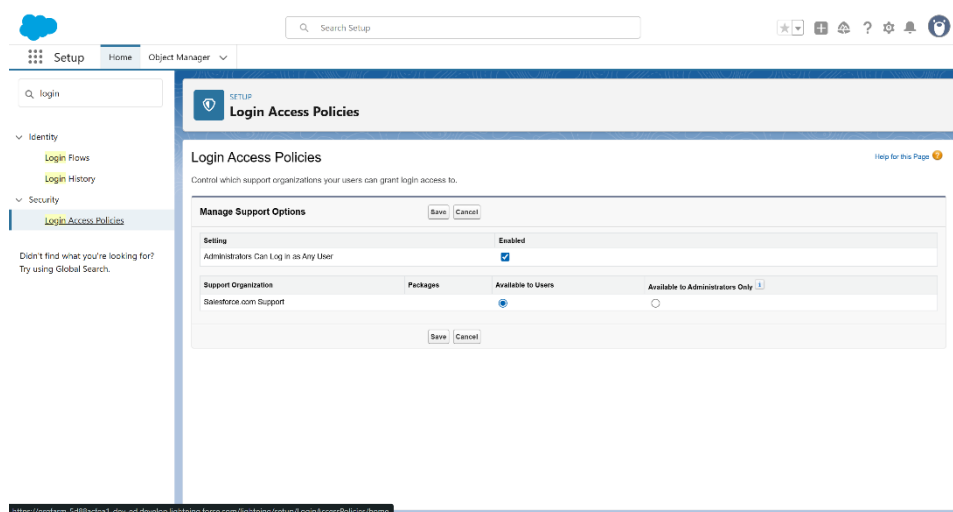
The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'shari' and a 'Security' section with 'Sharing Settings' highlighted. The main content area is titled 'Sharing Settings' and 'Lead Sharing Rule'. It includes a description of sharing rules and a form to create a new rule. The form fields are: Label (Donations for Donor Relatic), Rule Name (Donations\_for\_Donor\_Rela), Description (empty), Role (CEO), Group (Donar Relations Team), Lead Access (Read Only), and Created By (MANJIRI WATT, 9/18/2025, 6:08 AM). There are 'Save' and 'Cancel' buttons at the bottom.

## 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.



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'login' and a 'Security' section with 'Login Access Policies' highlighted. The main content area is titled 'Login Access Policies' and 'Manage Support Options'. It includes a description of login access policies and a form to manage support options. The form fields are: Setting (Administrators Can Log in as Any User), Enabled (checked), Support Organization (Salesforce.com Support), Packages (empty), Available to Users (checked), and Available to Administrators Only (unchecked). There are 'Save' and 'Cancel' buttons at the bottom.

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](https://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)**.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'my d' and a list of settings including 'My Domain'. The main content area is titled 'My Domain Settings' and includes a 'Help for this Page' link. It explains that My Domain showcases the company's brand and keeps data secure. It lists three steps to set up a My Domain: 1. Choose and register a My Domain, 2. Salesforce provisions your new domain, and 3. Deploy your new domain to users. Step 3 is currently active. Below this, it states that the new domain is provisioned and provides instructions on how to use it. A table shows the current domain 'orgfarm-5d88acfea1-dev-ed.develop.my.salesforce.com' and the new domain 'ngo-crm-dev-dev-ed.develop.my.salesforce.com'. At the bottom, there are buttons for 'Cancel New Domain' and 'Deploy New Domain', and a section for 'Routing and Policies' with an 'Edit' button. A footer note mentions 'Salesforce Edge Network'.

Setup

Search Setup

my d

Company Settings

My Domain

Didn't find what you're looking for? Try using Global Search.

### My Domain Settings

My Domain showcases your company's brand and keeps your data more secure. The domains that Salesforce hosts for your org include your company-specific My Domain name.

Set up a My Domain in three steps:

1. Choose and register a My Domain
2. Salesforce provisions your new domain
3. Deploy your new domain to users

#### Step 3: Deploy Your New Domain

Your new domain is provisioned. To start using it, deploy your new domain. After you deploy, users that visit your current domain are redirected to your new domain.

If you don't want to use the new domain or if you want to make a different change to your My Domain, cancel the new domain.

Current domain	orgfarm-5d88acfea1-dev-ed.develop.my.salesforce.com with partitioned enhanced domains
New domain	ngo-crm-dev-dev-ed.develop.my.salesforce.com with partitioned enhanced domains

Cancel New Domain Deploy New Domain

#### Routing and Policies

Edit

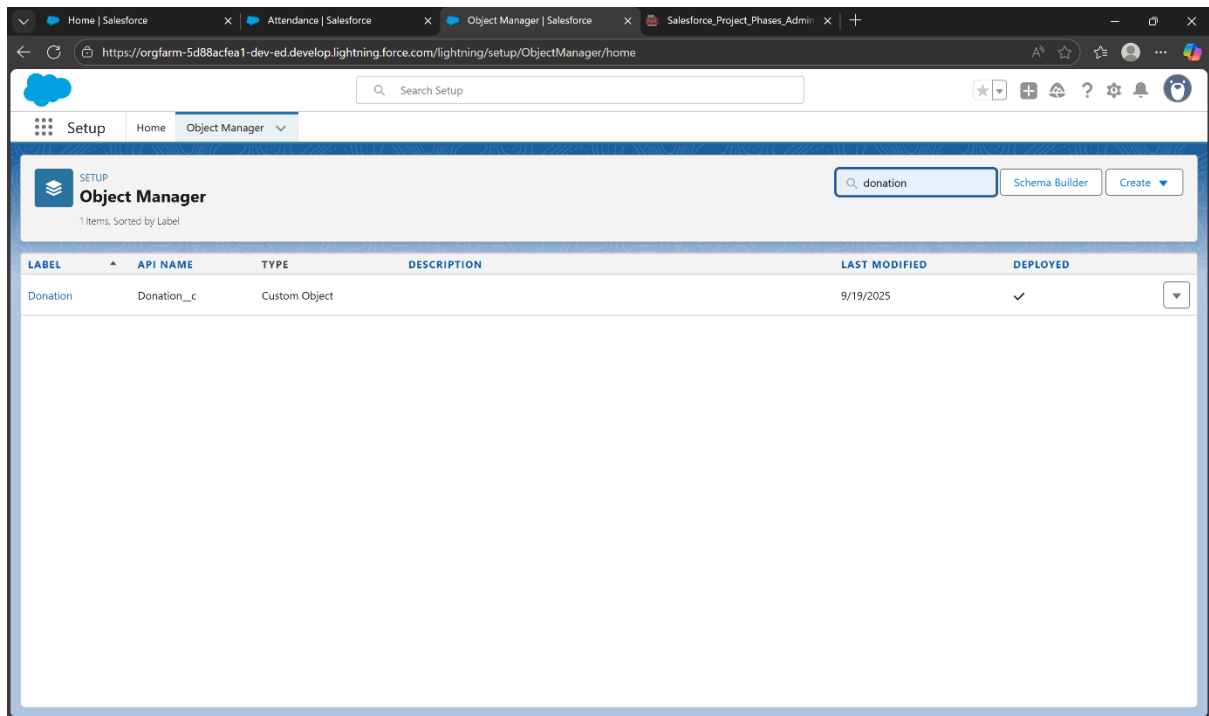
Salesforce Edge Network Salesforce Edge Network applies to most provisioned and deployed domains for this org. See Salesforce Edge Network in Salesforce Help for details.

**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**.

Home | Salesforce

Attendance | Salesforce

Donation | Salesforce

Salesforce\_Project\_Phases\_Admin |

https://orgfarm-5d88acfea1-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gl000002ILrF/FieldsAndRelationships/view

Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Donation

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Fields & Relationships

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	Text(80)		✓
DonationAmount	DonationAmount__c	Currency(16, 2)		
DonationDate	DonationDate__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		

Home | Salesforce

Attendance | Salesforce

Donation | Salesforce

Salesforce\_Project\_Phases\_Admin |

https://orgfarm-5d88acfea1-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gl000002ILrF/FieldsAndRelationships/00NgL00001ga6Hh/view

Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Donation

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

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

Decimal Places

Validation Rules

New

Validation Rules Help

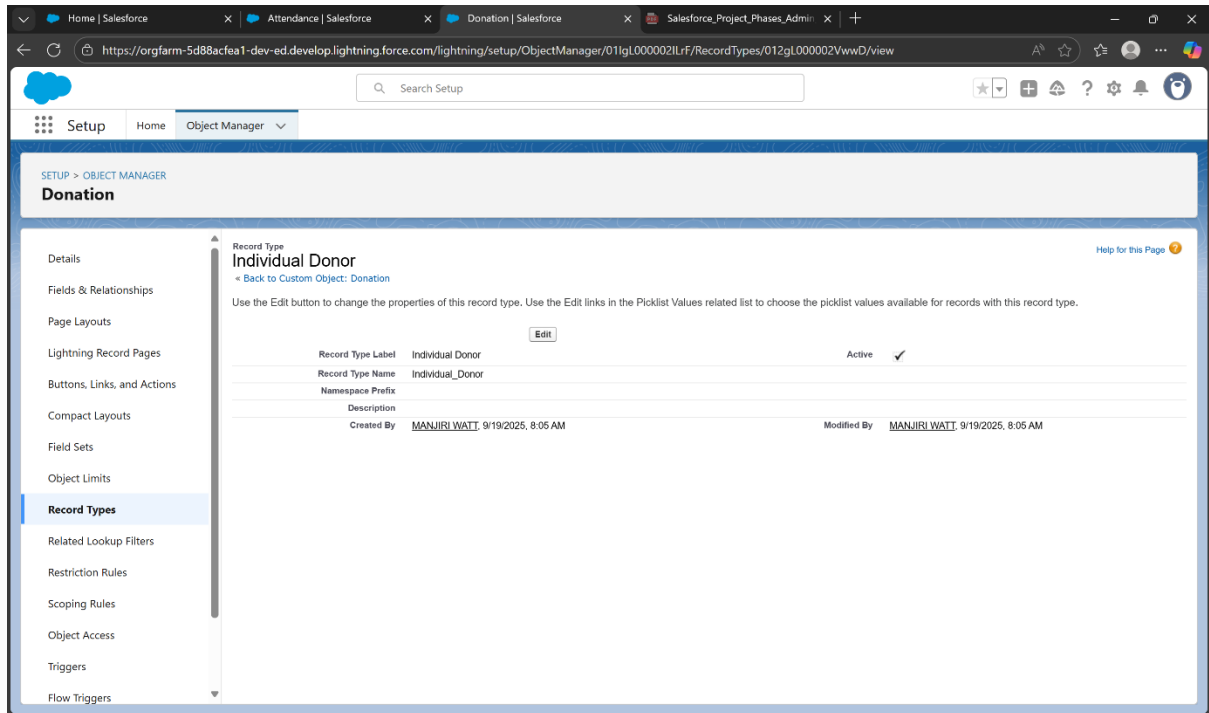
No validation rules defined.

Back To Top

Always show me more records per related list

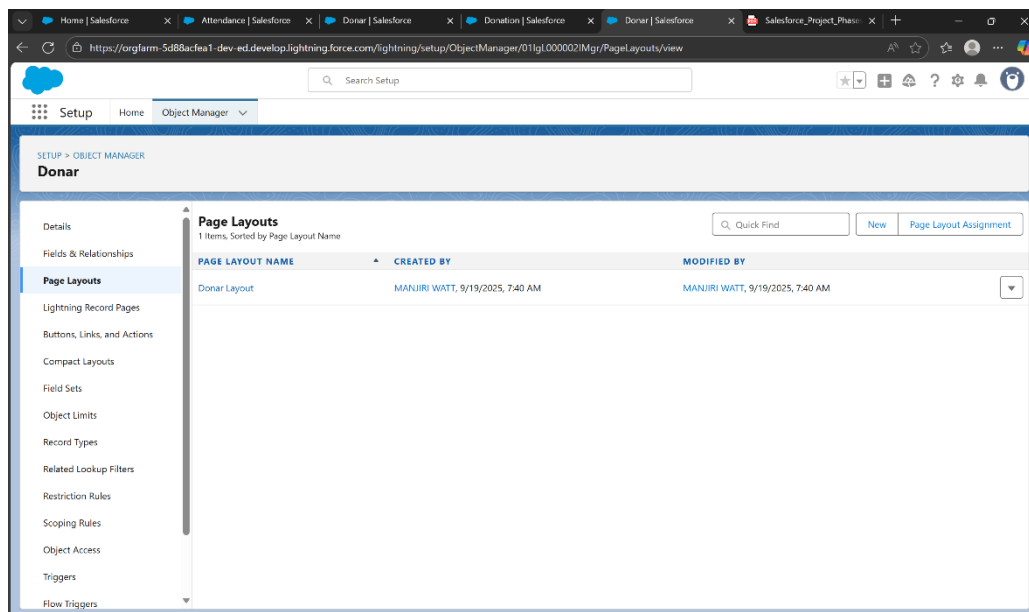
### 3) Record Types

- 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.

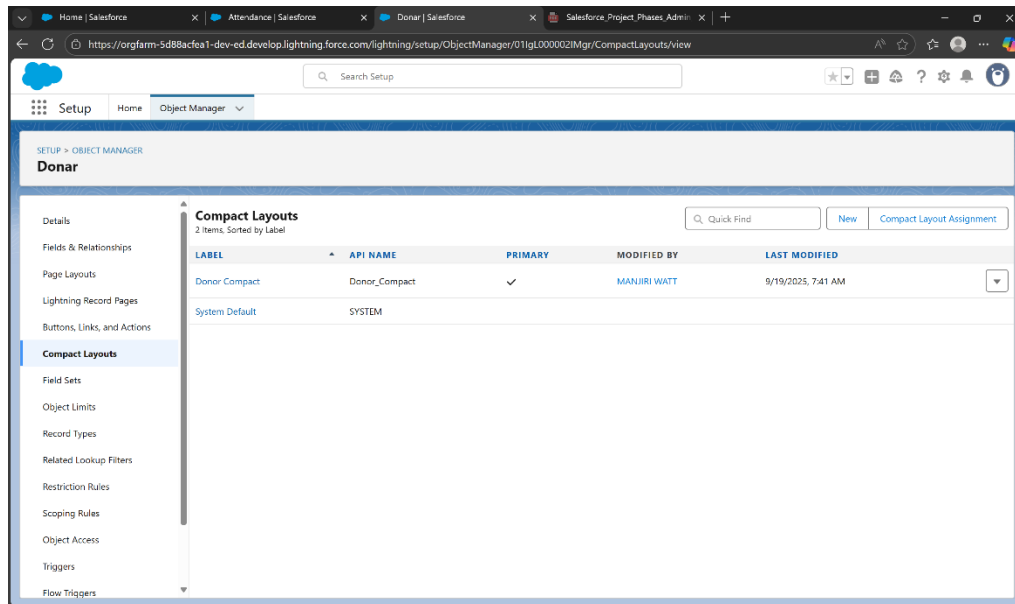


Object Manager → pick object → **Page Layouts** → **Edit/New**.

## 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**.

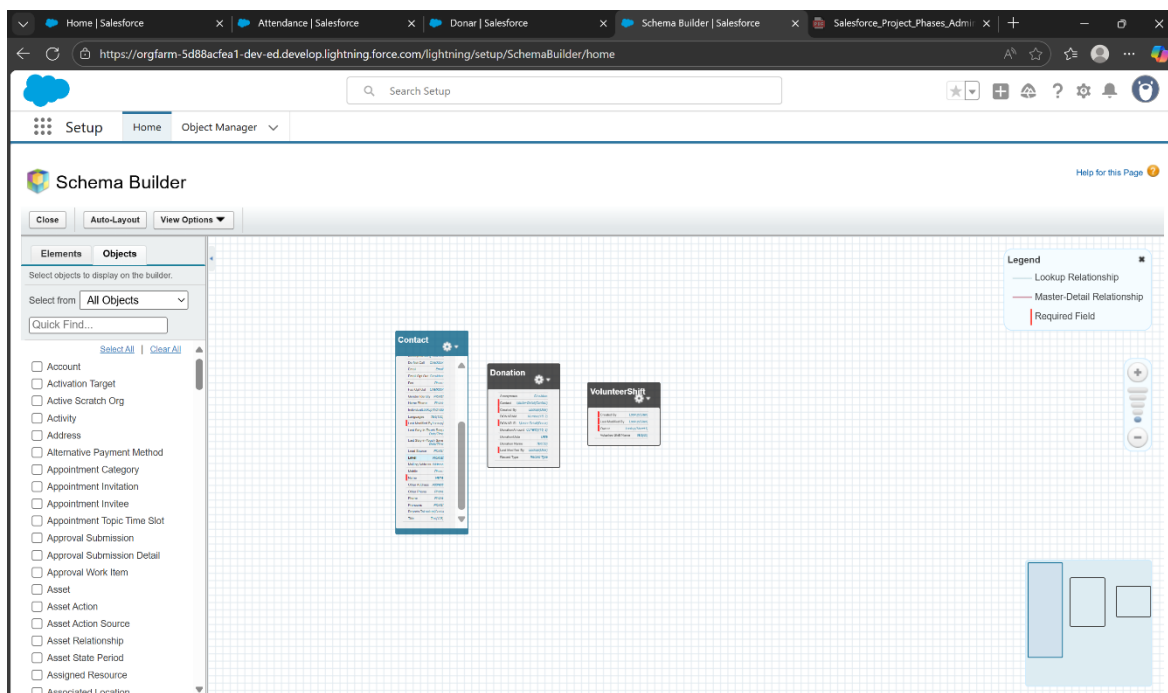


6)

## Schema Builder

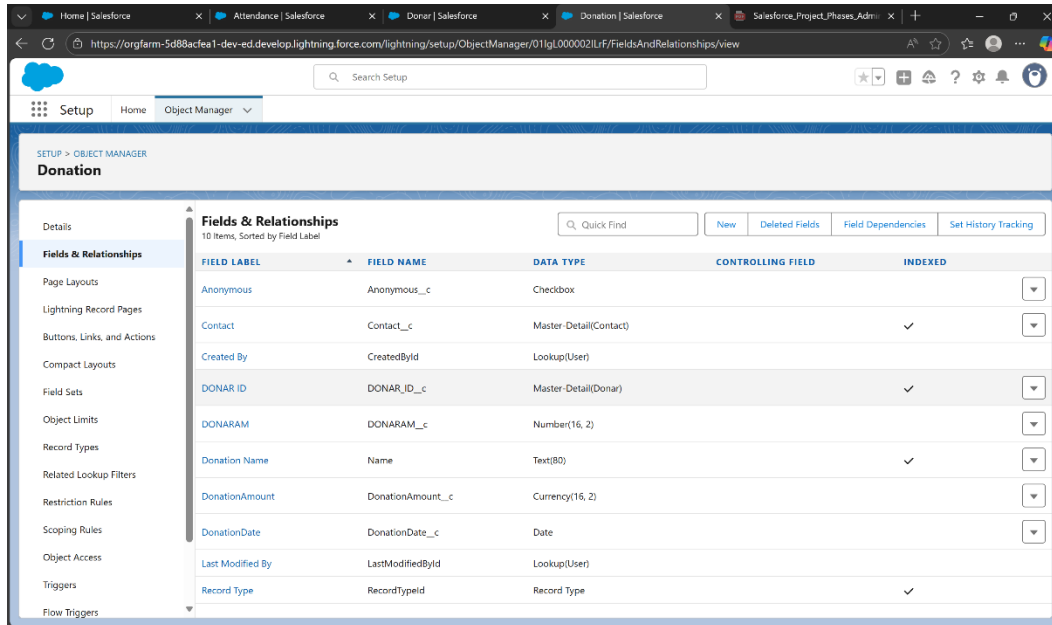
- Visual, drag-and-drop view of all objects and fields.
- Useful for seeing relationships at once.

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.



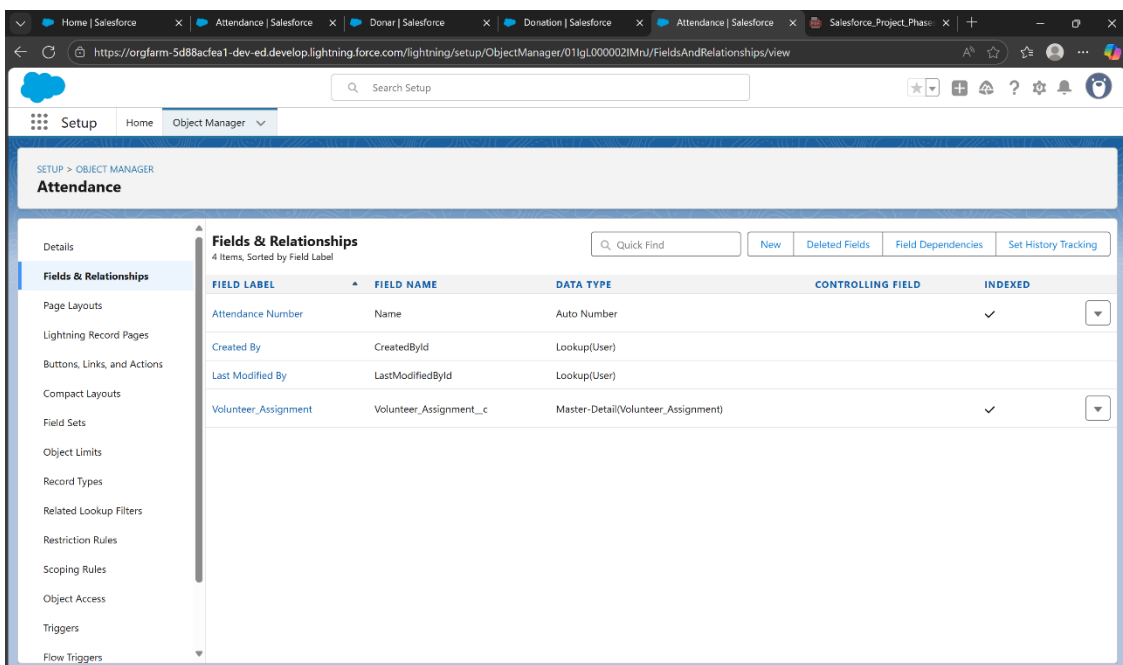
The screenshot shows the Salesforce Object Manager interface for the 'Donation' object. The 'Fields & Relationships' tab is selected, displaying a table of 10 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields are sorted by Field Label.

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	Text(80)		✓
DonationAmount	DonationAmount__c	Currency(16, 2)		
DonationDate	DonationDate__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Record Type	RecordTypeId	Record Type		✓

- **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.



The screenshot shows the Salesforce Object Manager interface for the 'Attendance' object. The 'Fields & Relationships' tab is selected, displaying a table of 4 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields are sorted by Field Label.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendance Number	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Volunteer_Assignment	Volunteer_Assignment__c	Master-Detail(Volunteer_Assignment)		✓

## 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.

