

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)

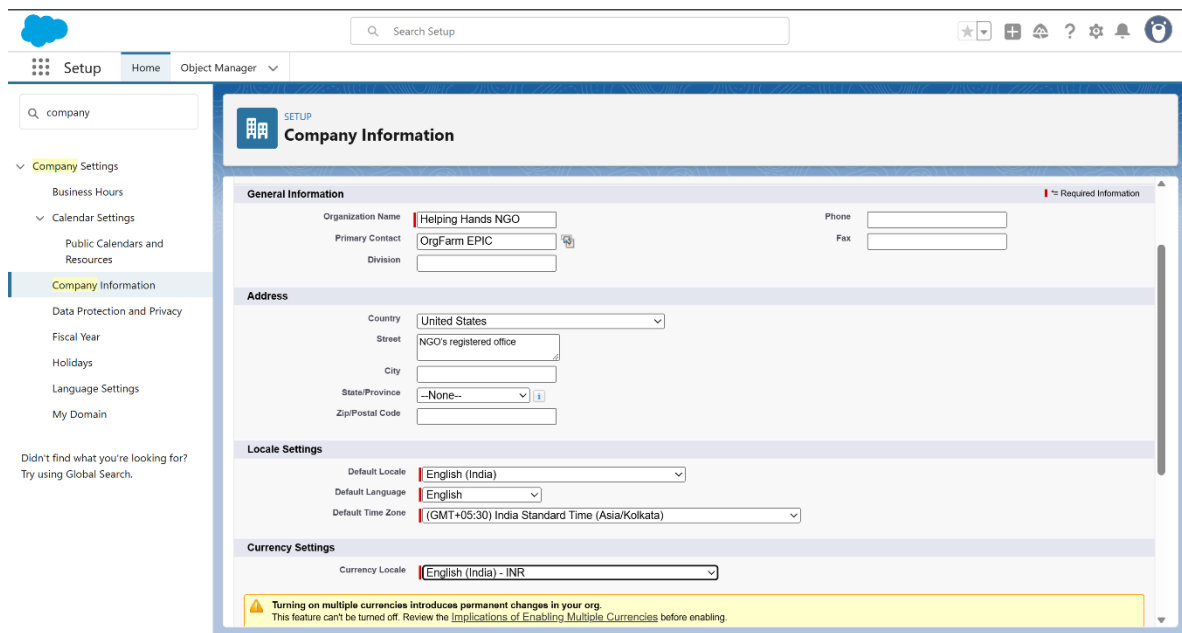
Why: Defines org-level defaults for time zone, currency, locale, and identity.

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

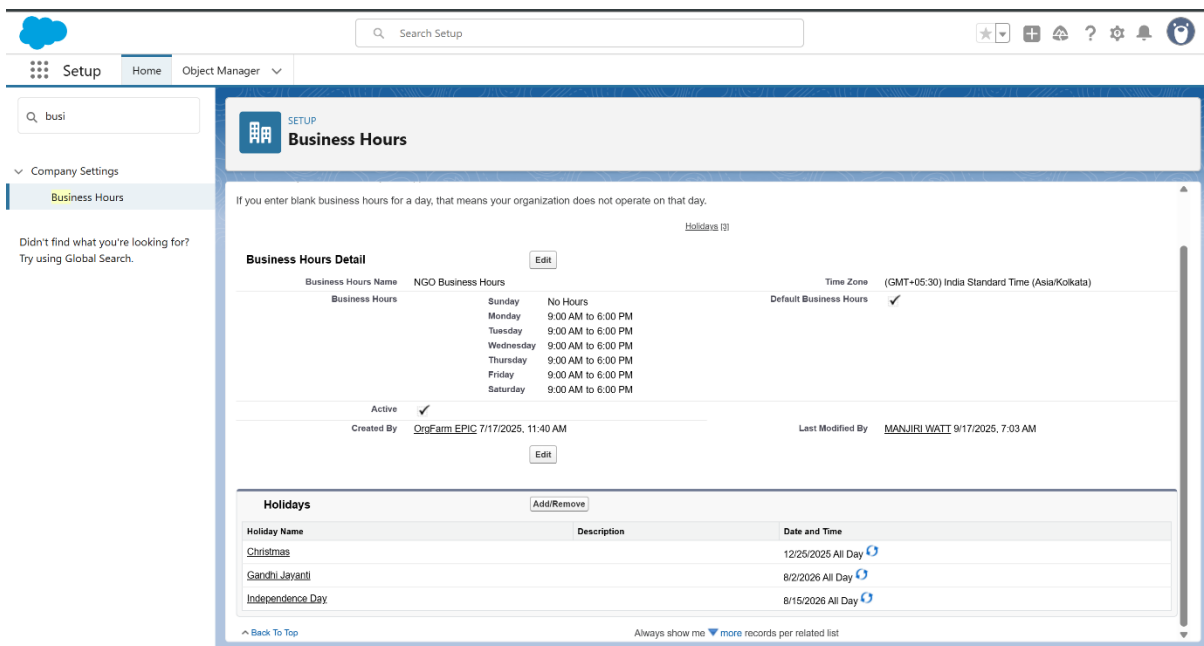
Turning on multiple currencies introduces permanent changes in your org. This feature can't be turned off. Review the implications of Enabling Multiple Currencies before enabling.

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 for 'Organization Fiscal Year Edit: Helping Hands NGO'. The left sidebar shows 'Setup' with 'Fiscal Year' selected under 'Company Settings'. The main content area displays the 'Fiscal Year' setup page. A modal window titled 'Change Fiscal Year Period' is open, showing the 'Fiscal Year Start Month' set to 'April' and 'Fiscal Year is Based On' set to 'The ending month'. A warning message states: 'Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.'

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 for user management. The left sidebar contains a navigation menu with categories like 'Users', 'Feature Settings', 'Data.com', 'Service', 'Embedded Service', and 'User Interface'. The 'Users' section is expanded, showing options like 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The 'Users' option is selected, leading to the 'User Detail' page for a user named 'Manju watt'. The user's details include Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, and various system permissions. The user is active and has the 'Standard Platform User' profile. The 'Permissions' section shows a list of permissions with checkboxes indicating whether they are enabled or disabled.

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 'Finance Profile' is selected, and the 'Profile Detail' section is visible. The profile is named 'Finance Profile' and is a 'Custom Profile'. The 'Page Layouts' section shows various layouts assigned to the profile, including 'Global', 'Email Application', 'Home Page Layout', 'Account', 'Alternative Payment Method', and 'Appointment Invitation'. The 'Standard Object Layouts' section lists various layouts for different objects, such as 'Payment Authorization', 'Payment Authorization Adjustment', 'Payment Gateway', 'Payment Gateway Log', 'Payment Group', and 'Payment Line Invoice'.

Profile: Finance Profile

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.

[Login IP Ranges \(0\)](#) | [Enabled Apex Class Access \(0\)](#) | [Enabled Visualforce Page Access \(0\)](#) | [Enabled External Data Source Access \(0\)](#) | [Enabled Named Credential Access \(0\)](#) | [Enabled External Credential Principal Access \(0\)](#) | [Enabled Custom Metadata Type Access \(0\)](#) | [Enabled Custom Setting Definitions Access \(0\)](#) | [Enabled Flow Access \(0\)](#) | [Enabled Service Presence Status Access \(0\)](#) | [Enabled Custom Permissions \(0\)](#)

Profile Detail [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Finance Profile	Custom Profile	<input checked="" type="checkbox"/>
User License	Force.com - Free		
Description			
Created By	MANJIRI WATT, 9/17/2025, 7:22 AM	Modified By	MANJIRI WATT, 9/18/2025, 6:15 AM

Page Layouts

Standard Object 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.

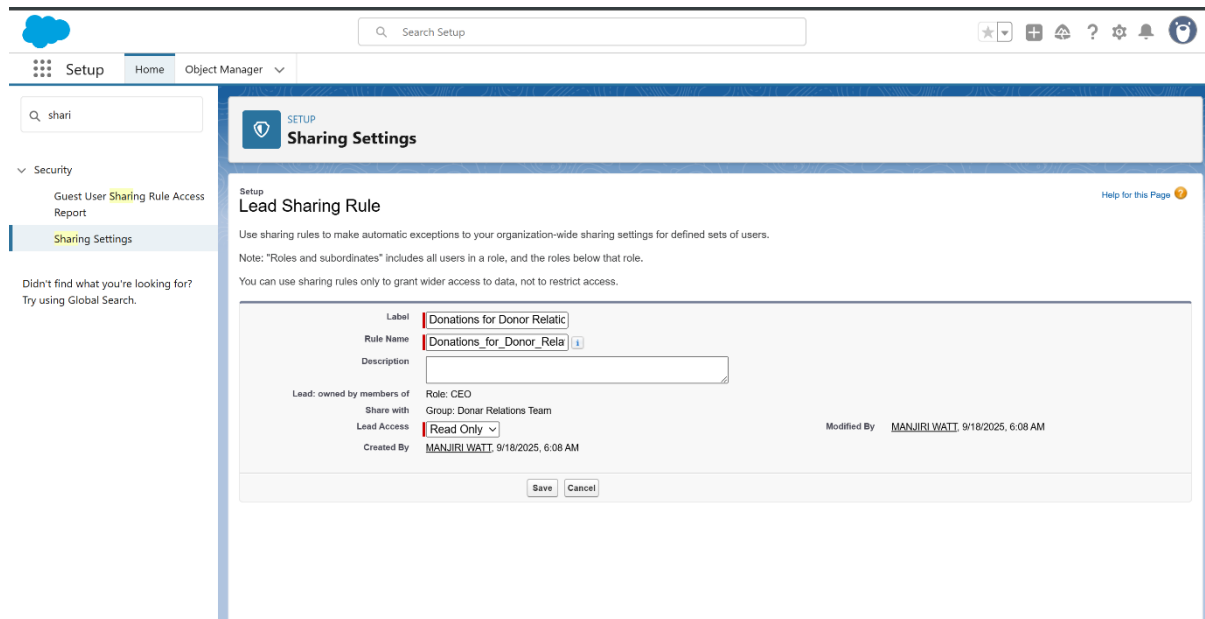
10. Sharing Rules

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.



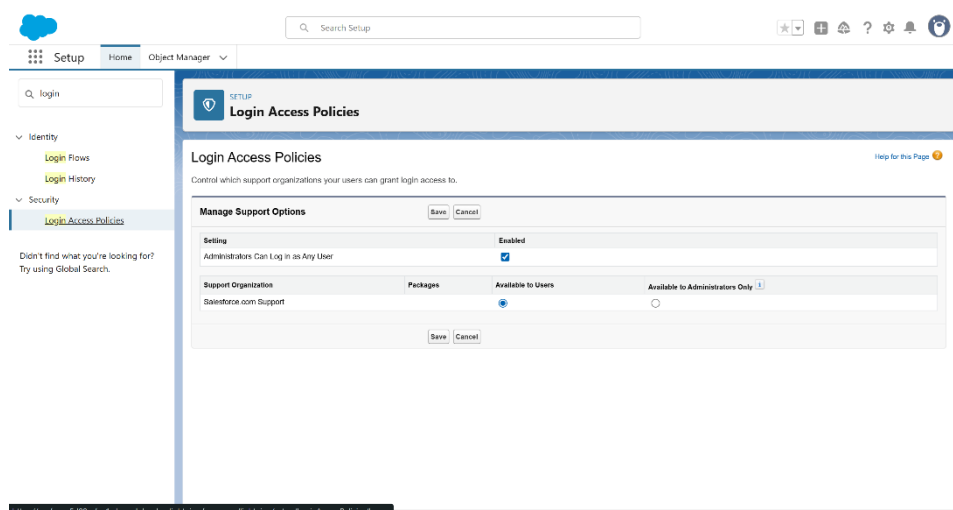
The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'shari' and a 'Security' section with 'Sharing Settings' highlighted. The main content area is titled 'Sharing Settings' and 'Setup Lead Sharing Rule'. It includes instructions on using sharing rules and a form 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 for 'Login Access Policies'. 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 table with columns: Setting, Packages, Available to Users, and Available to Administrators Only. The table has one row: Administrators Can Log in as Any User, which is enabled. There are 'Save' and 'Cancel' buttons at the bottom.

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

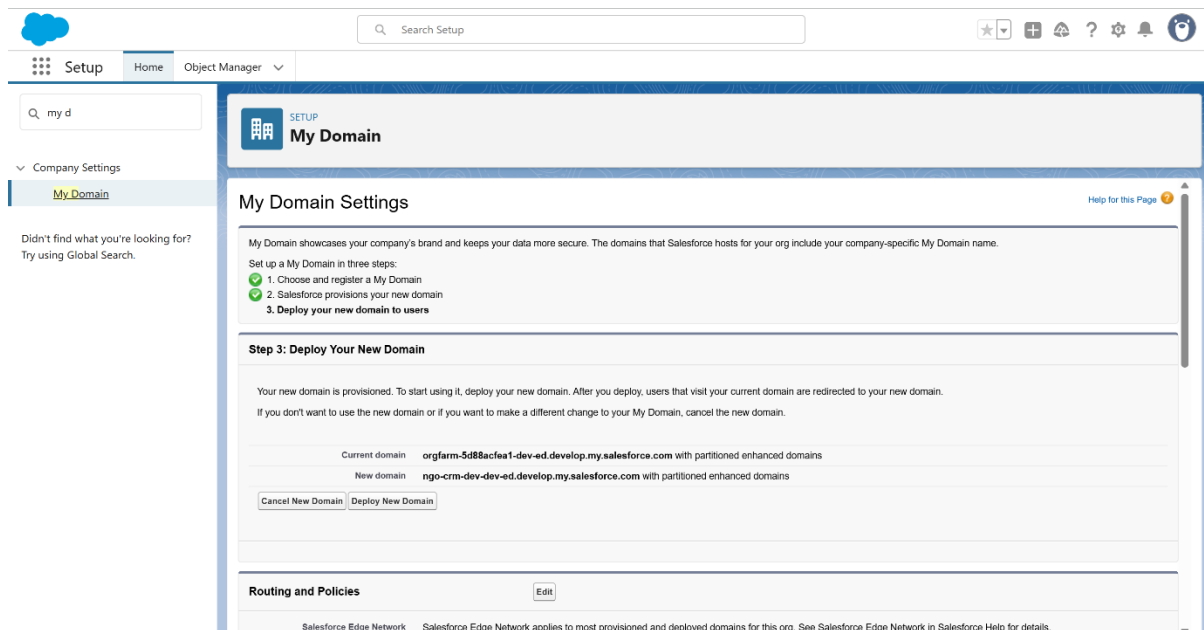
12. Dev Org Setup

Why: Build/test safely without touching Production.

Steps:

1. Sign up at developer.salesforce.com 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.



The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, a search bar labeled "Search Setup", and various utility icons. The left sidebar shows the Setup menu with "My Domain" selected under "Company Settings". The main content area is titled "My Domain Settings" and includes a "Help for this Page" link. The page 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. The "Step 3: Deploy Your New Domain" section is currently active, showing the current domain as "orgfarm-5d88acfe1-dev-ed.develop.my.salesforce.com" and the new domain as "ngo-crm-dev-dev-ed.develop.my.salesforce.com". There are buttons for "Cancel New Domain" and "Deploy New Domain". At the bottom, there is a "Routing and Policies" section with an "Edit" button and a note about the Salesforce Edge Network.