Smart Volunteer Collaboration Network 🤝

Phase 3: Data Modeling & Relationships

Standard & Custom Objects

Object	Type	Purpose
Contact	Standard	Represents Volunteers
Campaign	Standard	Represents Events
Event Participation	Custom (Junction Object)	Links Volunteers to Events; stores Hours, Role, Feedback

Contact	Contact	Standard Object
Campaign	Campaign	Standard Object
Event Participation	Event_Participation__c	Custom Object

Fields
On Contact (Volunteer)

Path: Setup → Object Manager → Contact → Fields & Relationships → New

Field Name	Data Type	Notes
Skills__c	Picklist (Multi-Select)	Volunteer's skills (Medical Aid, Teaching, Cleanup, Fundraising, etc.)
Availability__c	Picklist	Weekdays, Weekends, Evenings
Past_Participation__c	Number	Number of past events attended
Status__c	Picklist	Active, Inactive

On Campaign (Event)

Path: Setup → Object Manager → Campaign → Fields & Relationships → New

Field Name	Data Type	Notes

Field Name	Data Type	Notes
Event_Type__c	Picklist	Blood Donation, Cleanup Drive, Educational Training, Fundraising, Food Distribution, Awareness Workshop, Tree Plantation, Health Camp, Disaster Relief, Community Outreach
Location__c	Text / Geolocation	Event location
Event_Date__c	Date/Time	Event date & time
Max_Volunteers__c	Number	Maximum allowed volunteers

On Event_Participation__c (Junction Object)

Path: Setup → Object Manager → Event_Participation__c → Fields & Relationships → New

Field Name	Data Type	Notes
Volunteer__c	Master-Detail → Contact	Links Volunteer
Event__c	Master-Detail → Campaign	Links Event
Role__c	Picklist	Volunteer, Team Lead, Coordinator
Hours__c	Number	Hours contributed
Feedback__c	Long Text Area	Post-event feedback

Record Types

For Campaign (Event)

Path: Object Manager → Campaign → Record Types → New

- Name: Event_RT
- Record Types:
    - Blood Donation
    - Cleanup Drive
    - Educational Training
- Assign to profiles (Admin, Volunteer Coordinator)

- Optionally link custom Page Layouts

Record Types 3 Items, Sorted by Record Type Label	Q Quick Find		New	Page Layout Assignment
RECORD TYPE L... ▲	**DESCRIPTION**	**ACTIVE**	**MODIFIED BY**	
Blood Donation	Campaign for blood donation events	✓	Sneha Yadav, 23/09/2025, 10:44 pm	▼
Cleanup Drive	Environmental cleanup events	✓	Sneha Yadav, 23/09/2025, 10:45 pm	▼
Educational Training	Training for underprivileged children	✓	Sneha Yadav, 23/09/2025, 10:46 pm	▼

Page Layouts / Contact Layouts
For Contact (Volunteer)

Path: **Object Manager → Contact → Page Layouts → New**

- Drag fields: Skills, Availability, Past Participation, Status
- Related List: Event Participations

Compact Layout (Highlights Panel): Skills, Availability, Status

For Campaign (Event)

Path: Object Manager → Campaign → Page Layouts → New

- Drag fields: Event Type, Event Date, Location, Max Volunteers
- Related List: Event Participations

Compact Layout: Event Type, Date, Location

For Event Participation (Junction)

Path: Object Manager → Event Participation → Page Layouts → New

- Drag fields: Volunteer, Event, Role, Hours, Feedback

Compact Layout: Volunteer, Event, Role, Hours

Page Layouts
1 Items, Sorted by Page Layout Name

PAGE LAYOUT N... ▲	CREATED BY	MODIFIED BY	
Contact Layout	Sneha Yadav, 18/09/2025, 10:21 pm	Sneha Yadav, 23/09/2025, 11:10 pm	▼

Quick Find | New | Page Layout Assignment

PAGE LAYOUT N... ▲	CREATED BY	MODIFIED BY	
Campaign Layout	Sneha Yadav, 18/09/2025, 10:21 pm	Sneha Yadav, 23/09/2025, 7:09 pm	▼

PAGE LAYOUT NA... ▲	CREATED BY	MODIFIED BY	
Event Participation Layout	Sneha Yadav, 23/09/2025, 11:53 am	Sneha Yadav, 23/09/2025, 10:51 pm	▼

Relationships

- **Master-Detail Relationship**:
  - Event_Participation__c. Volunteer__c → Contact
  - Event_Participation__c. Event__c → Campaign
- **Lookup Relationship (optional)**:
  - Can add Mentor__c (Lookup to Contact) or Venue__c (Lookup to Account) later
- **Many-to-Many Relationship**:
  - Achieved using **Event Participation** junction object
  - Allows many Volunteers to join many Events

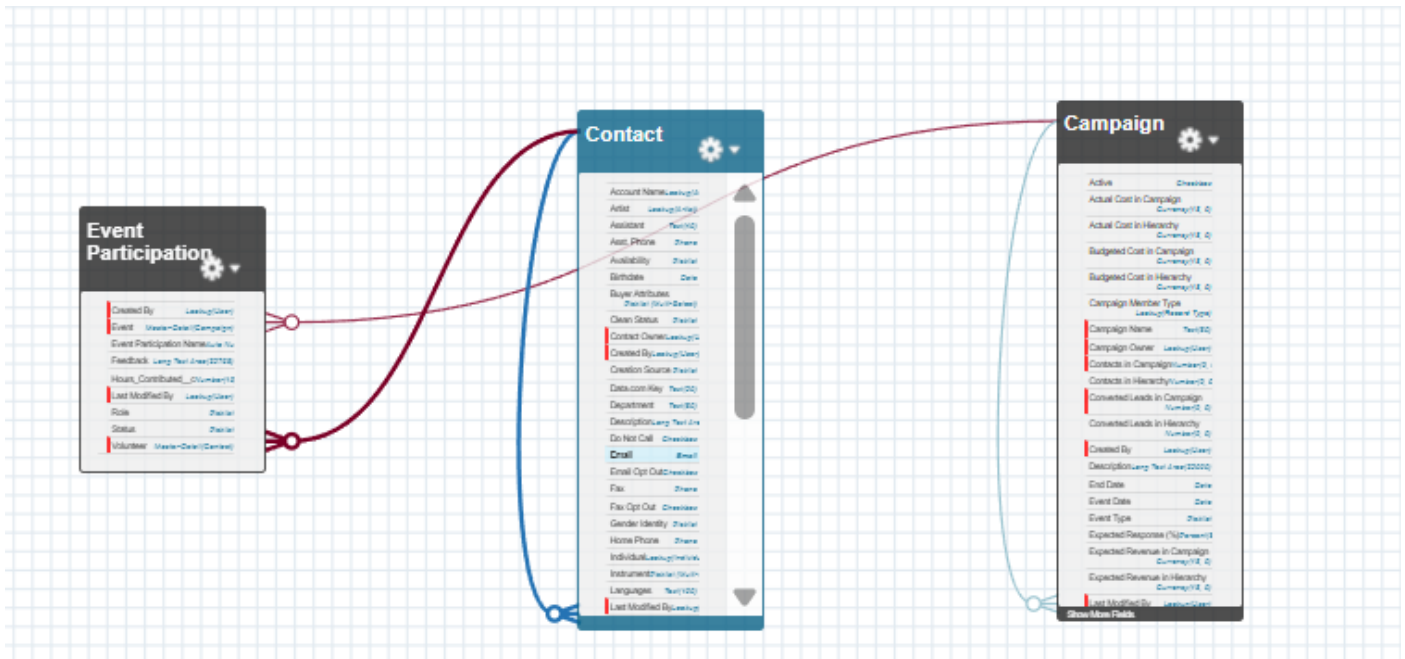| Created By	CreatedById	Lookup(User)
Event	Event__c	Master-Detail(Campaign)
Event Participation Name	Name	Auto Number
Feedback	Feedback__c	Long Text Area(32768)
Hours_Contributed__c	Hours_Contributed_c__c	Number(15, 2)
Last Modified By	LastModifiedById	Lookup(User)
Role	Role__c	Picklist
Status	Status__c	Picklist
Volunteer	Volunteer__c	Master-Detail(Contact)

Sharing Rules

Path: Setup → Sharing Settings → Campaign / Event Participation → New

- **Criteria-based Sharing Rule**:
  - Share records where Event_Type__c = "Blood Donation" with "Medical Team Group"
- **Owner-based Sharing Rule**:
  - Share events owned by "Volunteer Coordinators" with "NGO Staff"

Schema Builder

- Open **Setup → Schema Builder**
- Select **Contact, Campaign, Event Participation**
- Visualized Relationships:
  - Event Participation → Contact (Master-Detail)
  - Event Participation → Campaign (Master-Detail)
- Key Fields & Relationships:

- Contact: Skills, Availability, Status
- Campaign: Event Type, Date, Location
- Event Participation: Volunteer, Event, Role, Hours, Feedback

Junction Objects

- **Event Participation** links **many Volunteers → many Events**
- Contains **Master-Detail fields to both parents**
- Stores extra info: Hours, Role, Feedback
- Roll-up summary fields can calculate total hours per Volunteer or total volunteers per Event

External Objects (Optional for Future)

- Used to access data **outside Salesforce** like Google Sheets or external DB
- Access via Salesforce Connect → External Data Sources
- Not required for basic volunteer CRM; can be added later for integration