

# Online Charity ERP

## End User Guide

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# 1. Introduction

The **Online Charity ERP** app is a comprehensive solution designed to streamline the donation process for charitable organizations. This app, offered as a managed package, is available for free to anyone who wishes to use it. The app facilitates the collection of donations from donors and is integrated with the Razor pay payment gateway for secure and efficient payment processing.

## Key Features

1. **Program Masters:** Represents the causes or programs for which donations are collected.
2. **Donors:** Tracks the individuals or entities that contribute to the charitable causes.
3. **Collections:** Records the donation transactions associated with donors and programs.
4. **Payment Links:** Automatically generates payment links for donors, which are sent via SMS and email.
5. **Payment Records:** Logs the details of payments made through the payment links.

The app includes a user-friendly interface, with a dedicated tab called **Create Collections**. This tab houses a Lightning Web Component (LWC) that enables users to easily create donation collection records. Once a collection record is created, users can generate a payment link that fetches the donor's email ID and phone number. The donor receives the payment link, allowing them to contribute to the chosen cause effortlessly.

## Objects Managed

Online Charity ERP manages a wide range of custom objects:

- **Program Masters**
- **Donors**
- **Collections**
- **Payment Link**
- **Payment Records**

## Availability

Online Charity ERP is available as a managed package and can be downloaded and used for free by anyone on Salesforce AppExchange. This app offers a comprehensive solution for managing the entire donation process in one centralised platform, enhancing efficiency and productivity.

## 2. Configuration

Before installing Online Charity ERP, ensure that your Salesforce environment is configured as per the prerequisites listed below. This ensures optimal functionality and user experience.

### 2.1 Multi-Currency Support

Online Charity ERP requires that multi-currency support is enabled in your Salesforce org. Multi-currency enables your organisation to handle transactions in multiple currencies, which is essential for accurate financial reporting and donation collection.

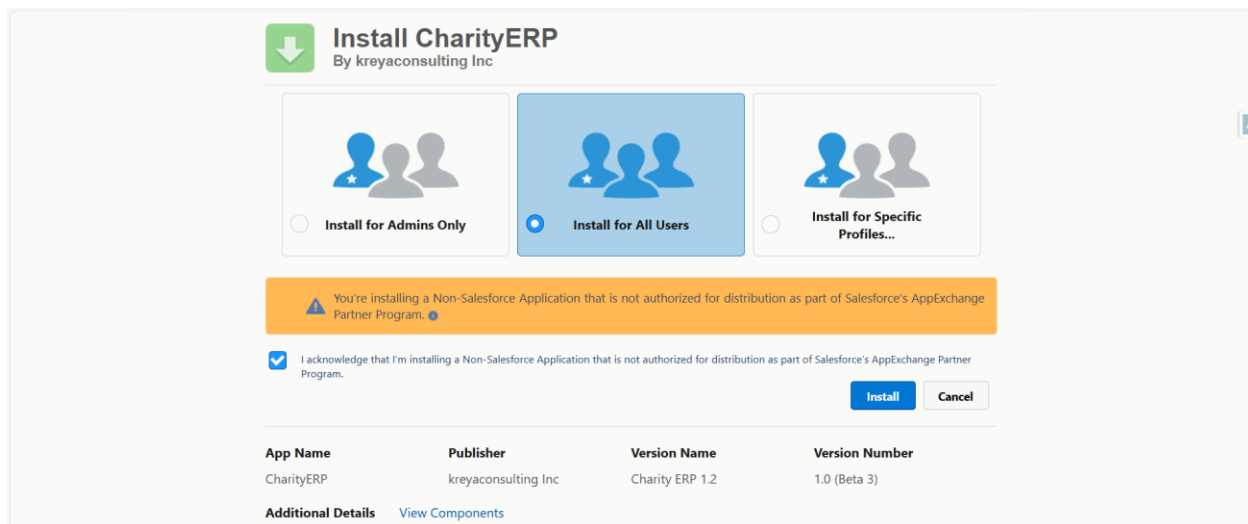
### 2.2 Custom Address Data Type

To utilise donor's address fields within Online Charity ERP, you need to enable the custom address data type in your Salesforce org. Follow these steps to enable custom address fields:

1. Go to **Setup** in Salesforce.
2. In the Quick Find box, enter **User Interface**, and select **User Interface**.
3. In the Setup section, check the box for **Use custom address fields**.
4. Click **Save** to apply the changes.

### 2.3 Additional Configuration After Installation

- Ensure that all users have the necessary permissions to access and modify the custom objects and fields used by Online Charity ERP.

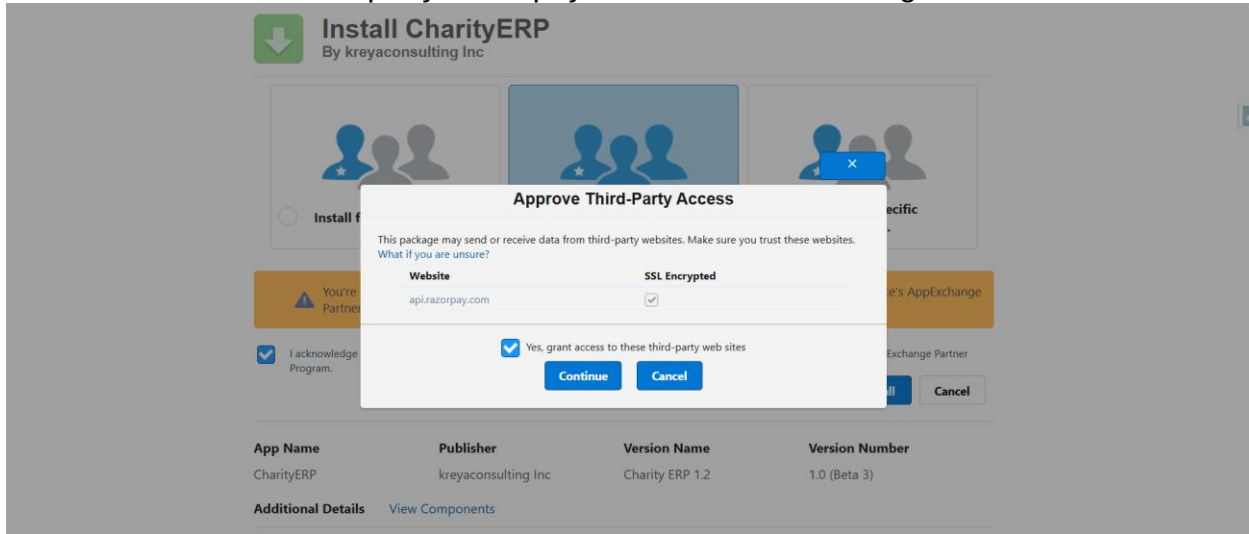


The screenshot shows the Salesforce AppExchange installation interface for 'CharityERP' by 'kreyaconsluting Inc'. At the top, there's a green download icon and the app name. Below this, three user selection options are presented: 'Install for Admins Only' (unselected), 'Install for All Users' (selected with a blue radio button), and 'Install for Specific Profiles...' (unselected). A yellow warning banner states: 'You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.' Below the banner, a checkbox is checked with the text: 'I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.' To the right of the checkbox are 'Install' and 'Cancel' buttons. At the bottom, a table provides details about the application:

| App Name   | Publisher           | Version Name    | Version Number |
|------------|---------------------|-----------------|----------------|
| CharityERP | kreyaconsluting Inc | Charity ERP 1.2 | 1.0 (Beta 3)   |

Below the table, there are links for 'Additional Details' and 'View Components'.

- Grant access to third party Razorpay website while installing.



- In order to show your company's information such as Organisation Logo, Organisation Name, Organisation Email, Organisation Contact Number, Organisation Address in the PDF follow the following steps:
  1. Go to Setup and search for Custom Metadata Types.
  2. In the Metadata Types, Click on 'PDF Info'.
  3. Click on 'Manage PDF Info' and Click 'New'.
  4. Enter the label for the metadata, Company Name, Company Email, Company Contact Number, Company Address.
  5. In the Footer, you can add the Terms and Conditions and any other information such as under which law you are collecting the donations.
  6. Enter Remarks if there is any and in the Cause you can enter any other information such as for which cause you are collecting the donation, etc.
  7. And for the Company Logo, enter the link of the logo image in the Company Logo. For the link of the logo image, switch to the classic salesforce and go to the Documents.
  8. There will be an image called 'Company Logo' in the document tab. Open that Company Logo file.
  9. Click on the Replace Document button, and replace the existing logo with your own Company Logo and save it.
  10. After saving, open your uploaded document image in the new tab and copy the URL in the metadata type.

**Note:** You can use the URL of the existing document image as well in the metadata.

anager ▾

## SETUP Custom Metadata Types

Custom Metadata Type  
PDF Info (Managed)

[This custom metadata type is managed. You can only edit certain attributes. Display More Information](#)

[Standard Fields \(8\)](#) | [Custom Fields \(8\)](#) | [Validation Rules \(0\)](#) | [Page Layouts \(1\)](#)

**Custom Metadata Type Detail** [Edit](#) [Manage PDF Info](#)

|                  |                                  |                  |                                  |
|------------------|----------------------------------|------------------|----------------------------------|
| Singular Label   | PDF Info                         | Description      |                                  |
| Plural Label     | PDF Info                         | Visibility       | Public                           |
| Object Name      | PDF_Info                         | Protection Level |                                  |
| Namespace Prefix | CharityERP                       | Record Size      | 1,791                            |
| API Name         | CharityERP__PDF_info__mdt        |                  |                                  |
| Created By       | Anant Tyagi, 27/08/2024, 3:54 pm | Modified By      | Anant Tyagi, 27/08/2024, 3:54 pm |

**Package Information**

|                   |            |                       |               |
|-------------------|------------|-----------------------|---------------|
| Installed Package | CharityERP | Available in Versions | 1.0 - Current |
|-------------------|------------|-----------------------|---------------|

- In order to connect your Salesforce with the Razorpay follow the following steps:
  - Go to Setup and search for Named Credential.
  - In the Named Credential, you will find two Named Credentials: **Razorpay Customer Named Principal** and **Razorpay Payment Named Principal**.
  - Edit these named credentials and paste your Razorpay Key Id in Username field and Razorpay Key Secret in Password.
  - Click on Save.

Cloud Setup Home Object Manager ▾

Q Search Setup

Q named

Security

Named Credentials

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

## SETUP Named Credentials

### Named Credential Edit: Razorpay Customer Named Principal

Specify the callback endpoint's URL and the authentication settings that are required for Salesforce to make calls to the remote system.

[Save](#) [Cancel](#)

Label: Razorpay Customer Named Principal  
Name: Razorpay\_Customer\_Named\_Principal  
URL: https://api.razorpay.com/v1/customers

**Authentication**

Certificate:

Identity Type: **Named Principal**

Authentication Protocol: **Password Authentication**

Username:

Password:

**Callout Options**

Generate Authorization Header: ☒

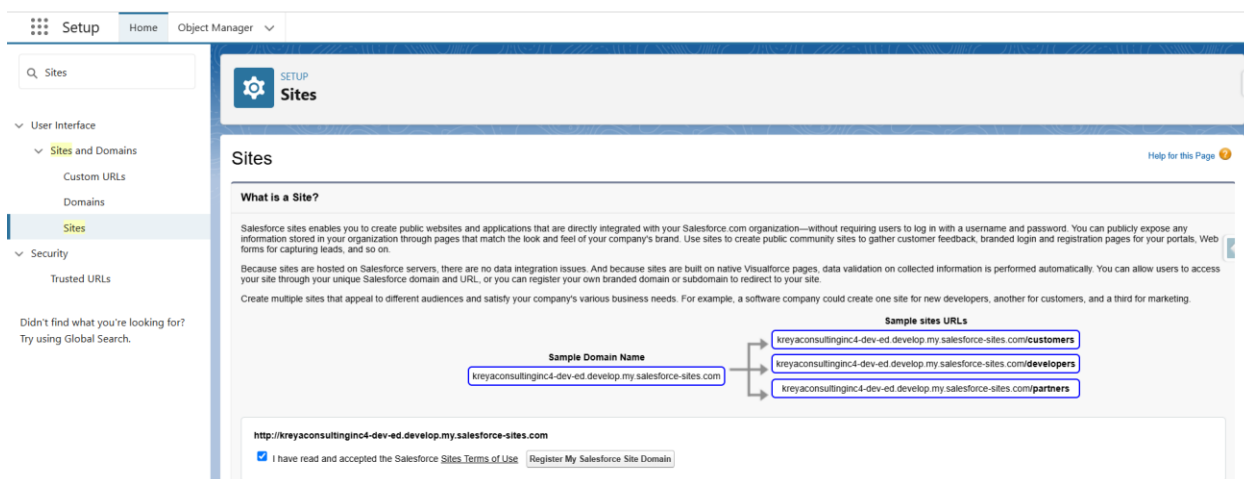
Allow Merge Fields in HTTP Header: ☐

Allow Merge Fields in HTTP Body: ☐

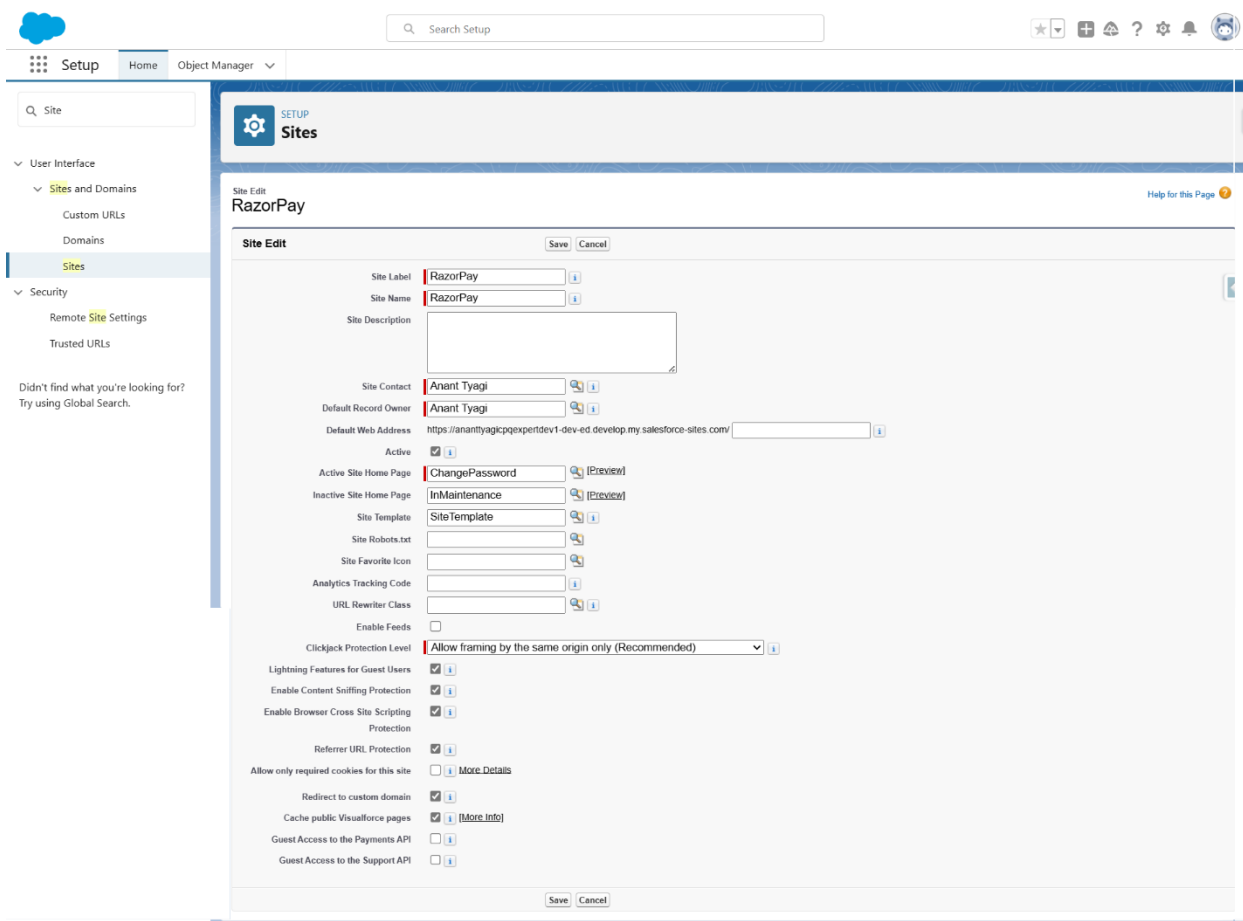
Outbound Network Connection:

[Save](#) [Cancel](#)

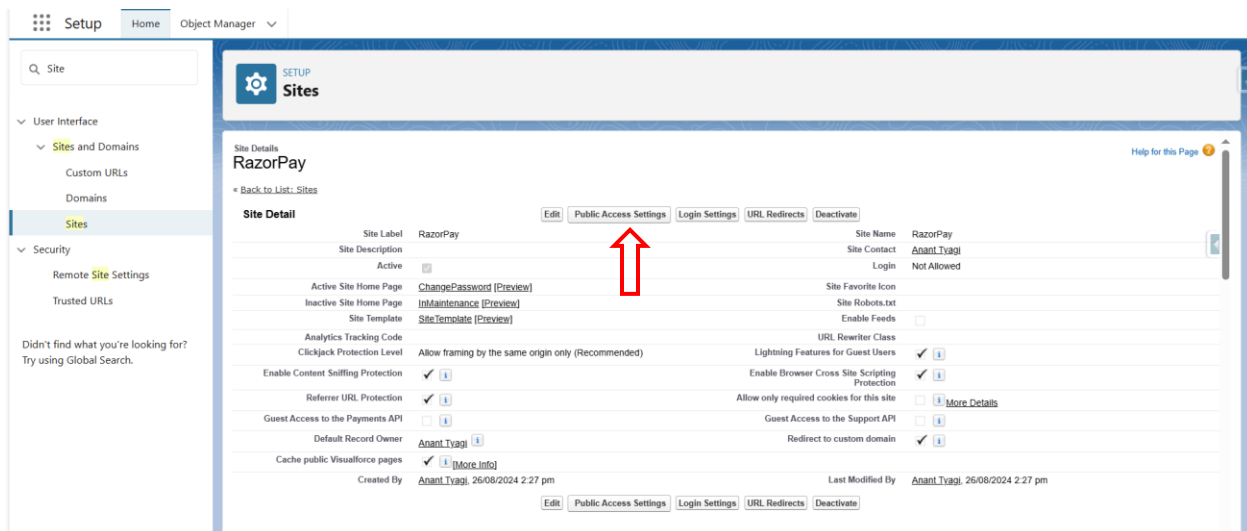
- Click on setup and search 'Sites' in quick find box and Click on Sites. Check the checkbox saying 'I have read and accepted the Salesforce Sites Terms of Use' and click on 'Register my salesforce site domain' button.



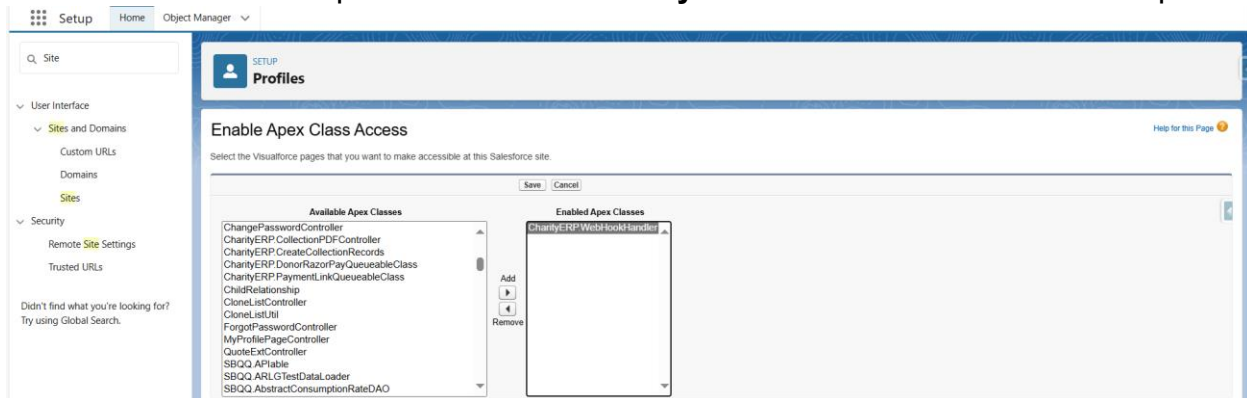
- Click on New to create new site, Enter the label for your site, for example 'Razorpay', Click on **Active** Checkbox, choose any Active Site Home Page and Click Save.



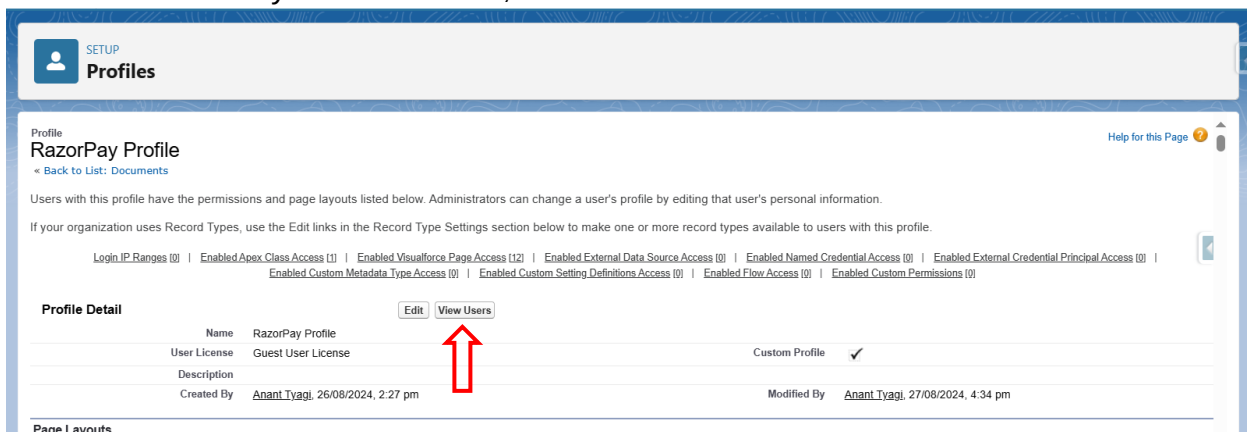
- Now your Site has been created successfully. Click on the Site Label which you have provided, in our example Razorpay.
- Click on Public Access Setting after opening the newly created site. A new profile has been created which can be only opened from here, click on edit to edit the profile and give read/write permissions for 'Donor', 'Payment Link' and 'Payment Records' objects and their Tabs.

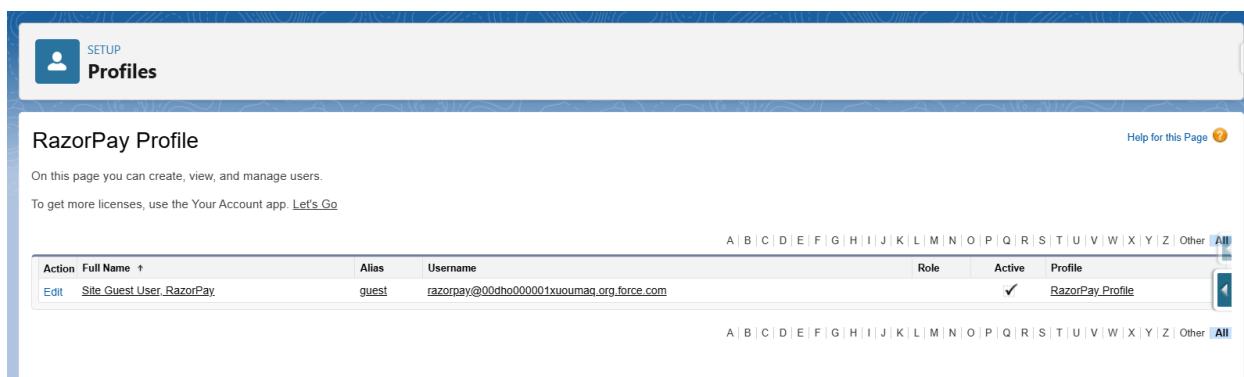


- Give access to apex class Called '**CharityERP.WebHookHandler**' for this profile.



- Click on '**View Users**' button and check if the guest user which have been created automatically is active or not, if not then activate it.





- Go to Setup and Search for Sharing Settings in quick find box and give following permissions:

| OWD | Object         | Default Internal Access | Default Internal Access | Default Internal Access |
|-----|----------------|-------------------------|-------------------------|-------------------------|
|     | Donor          | Public Read/Write       | Public Read/Write       | Checked                 |
|     | Payment Link   | Public Read/Write       | Public Read/Write       | Checked                 |
|     | Payment Record | Public Read/Write       | Public Read/Write       | Checked                 |

| Sharing Name        | Rule | Criteria                                                                                                                                                                                                          | Shared With              | Access Level | Select your rule type                |
|---------------------|------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------|--------------------------------------|
| RazorPay Guest User |      | 1. (Payment Link: Reference Id not equal to)<br><b>OR</b><br>2. (Payment Link: Payment Link# contains PL)<br><b>OR</b><br>3. (Payment Link: SMS equals True)<br><b>OR</b><br>4. (Payment Link: Email equals True) | RazorPay Site Guest User | Read Only    | Guest user access, based on criteria |

- Above is the Criteria based sharing rule to give access of all Payment Link records to the guest users. It will share all the Payment Link records to the guest user whose Reference Id is not null **OR** whose Payment Link# contains 'PL' **OR** whose SMS checkbox is true **OR** whose Email checkbox is true.

- Now go to Sites from quick find box of setup. And copy your site link. Your Site Link will be under the **Site URL** column. For Example: **<https://onlinecharityerp.my.salesforce-sites.com/>**
- Login to your Razorpay website. And click on '**Accounts & Settings**' from the Menu bar. Click on **Webhooks** in the '**Website and app settings**' section.
- Click on '**Add New webhook**' button.
- In the **Webhook URL** input field copy the Site URL which you have copied before and append it by adding this: **/services/apexrest/CharityERP/api/invokeWebhook**
- For example, if your site URL is '**https://onlinecharityerp.my.salesforce-sites.com/**' then your Webhook URL will be:

**<https://onlinecharityerp.my.salesforce-sites.com/services/apexrest/CharityERP/api/invokeWebhook>**

- Leave the **Secret** as blank. In the **Alert Email**, enter the email on which you want to receive errors if any occurred.
- In **Active Events**, select '**payment.captured**' and '**payment.failed**'.
- Click on Save and make sure that it is enabled.

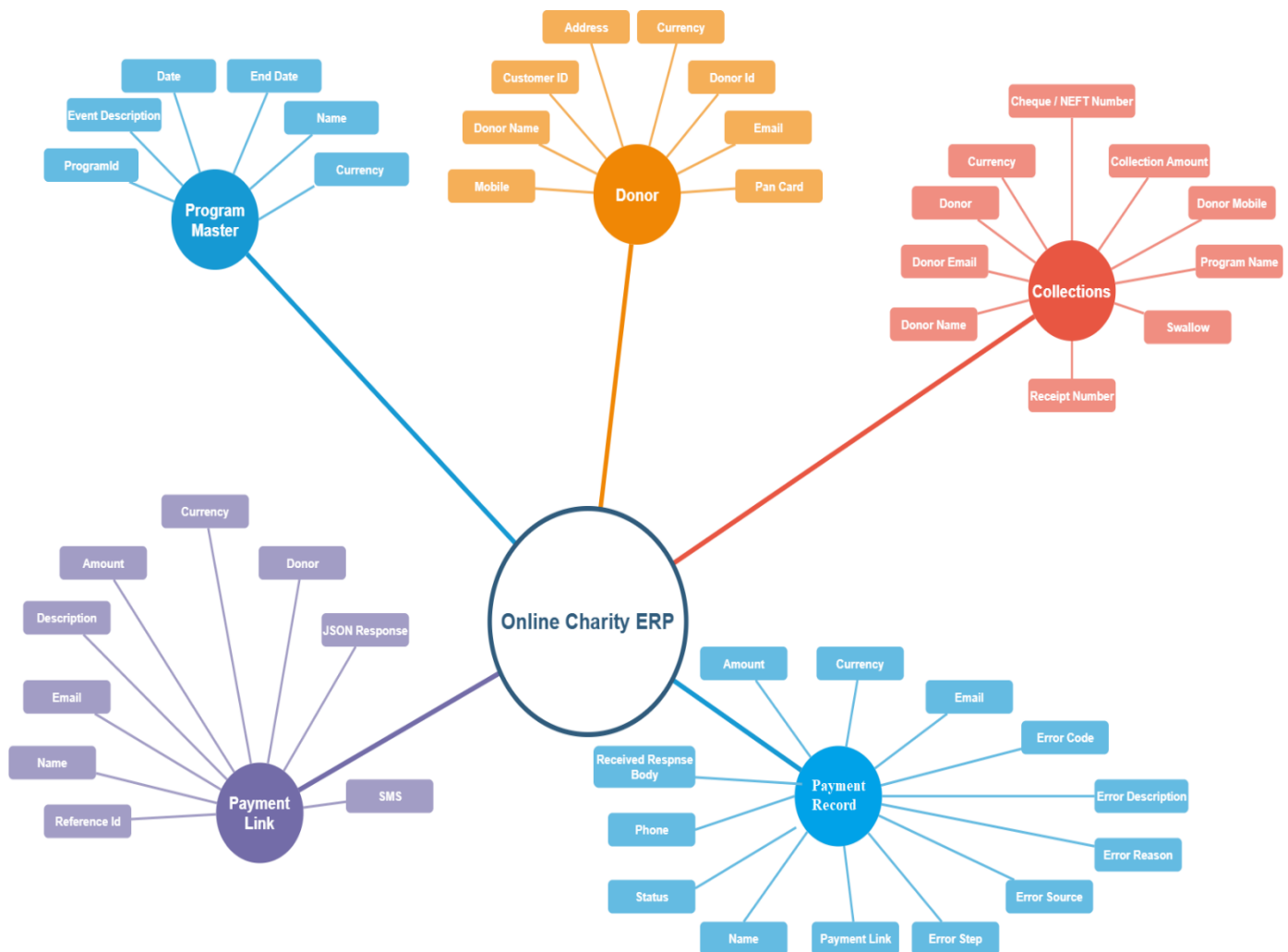
### 3. Use Case

- Open the Online Charity ERP app.
- Create a Program Masters record. Program Masters represents the causes or programs for which donations are collected.
- Click on Donors tab and create a donor record. Donor is the person who is donating the money for the cause.
- Click on Create Collections records, Enter the contact number of the donor, and the donor details such as Donor Name, Donor Email and Donor Lookup will be fetched automatically through contact number. If the donor does not exist then you can create donor record by clicking on 'New Donor' button at the top-right corner of the LWC component.
- Enter the Amount, Program Name Lookup and Cheque/NEFT\_Number if exists or if it is through Cash, then enter cash.
- If you want to add more collections then click on 'Add Collection' button otherwise click on 'Submit Collection' button to create Collections.
- A PDF of Collection will be created automatically on the collection record and you can open the PDF in the Files related list of the Collection record.
- If the payment is through Online banking such as UPI, Cards, Net Banking then click on the Payment Link to generate the payment link.
- Create the record for payment link, and click on checkbox through which you want to send the payment link such as SMS or Email or both. The contact number and

email id will be fetched from donor record automatically using donor lookup on payment link. Choose the currency and Amount and click Save.

- J. After the Payment Link record creation, the package will create a Payment Link record on the Razorpay and the donor will receive the payment link in his/her mobile and email. Razorpay payment link Id will be returned and will be stored in the Reference Id field of salesforce Payment Link object along with returned JSON response in the 'JSON Response' field.
- K. After the Donor pay the amount, the payment record will be created in the Payment Record object along with status and error code in case payment was failed.

## 4. ER Diagram



## 5. Support

Online Charity ERP offers a comprehensive support system to ensure that users have a seamless experience while using the app.

For any technical issues, feature requests, or feedback, you can reach out to our support team through the following channels:

- **Email:** [contact@kryaconsulting.com](mailto:contact@kryaconsulting.com)
- **Phone:** +91-9582388885, +91-9582388885
- **Website:** [www.kryaconsulting.com](http://www.kryaconsulting.com)