

Golden Heart

Granular permissions, member-portal craft, mission-grade data privacy.

Industry: Nonprofit

Region: United States

Engagement: Implementation

Headline results

CSAT SCORE

5.0

10/10 on every question

WORKSTREAMS

4

Perm Sets, Conga, Events

PERMISSION SETS

56

Persona-based, granular

COMMUNITY USERS

45

Member portal externals

The need

Golden Heart runs a mission-driven community on Salesforce with Person Accounts, an Advanced Communities member portal, event registration, and membership subscriptions. The Contact object carries deeply sensitive data — well-being notes, care notes, spiritual initiation status — which made principle-of-least-privilege access non-negotiable, not just best practice.

What we delivered

- Persona-based permission sets: 56 custom sets, 41 permission set groups, strict Read/Edit separation on sensitive fields.
- Conga reporting: three custom-formatted reports with specific layout requirements for community ops.
- Event Registration Automation: scoped SOW covering object setup, 5 email templates, and Conga Orchestrate flow.
- Mailchimp integration kicked off to extend community communications beyond Salesforce-native channels.

CUSTOMER QUOTE — AUTHORIZED FOR PUBLICATION ON APPEXCHANGE

"TGreen Workspace was very supportive and adapted easily to our development process flow and needs. They took the time to understand our needs and concerns and adapted their resources to meet our needs."

Tricia Randall, Salesforce Admin, Golden Heart · Survey completed 6/16/2026

How Phase 1 ran

Four discrete workstreams, each shippable. Larger Go-Live targeted for March 2027.

Permissions & security

56 custom permission sets and 41 permission set groups deployed. Field Level Security strictly enforced on sensitive data — Well-Being, Love & Care, Confidentiality.

Conga reporting

Three custom-formatted Conga reports built to the client's exact layout requirements. Conga Composer + Conga Sign integrated end-to-end.

Event registration automation

Scoped SOW (~80 hours) covering object setup, 5 email templates, and a partial Conga Orchestrate flow to handle complex registration workflows.

Mailchimp integration

Initial Mailchimp integration kicked off to extend community communications. Foundation in place for future automation rollouts.

FEATURED ARCHITECTURE — PERMISSION-SETS-ONLY MODEL

Sensitive data, strict access — by design, not by exception.

Profiles handle baseline access only; functional permissions live in 56 granular, persona-based permission sets — Event_Leader, WB_Screener, Contact_Love_Care_Elder_Care_Read, etc. The meticulous Read/Edit separation on Well-Being and Love & Care fields means data privacy is enforced by platform design, not policy memo. That's a meaningful win for a mission org handling sensitive community information.

WHY GOLDEN HEART PICKED TGWS

- Process-flow adaptability. We meet client workflow where it is rather than imposing ours.
- Privacy-by-architecture. Sensitive nonprofit data treated as the gating constraint on every design call.
- Phase-one discipline. Shippable workstreams now, larger go-live coordinated for 2027.