ProjectTitle:ToSupplyLeftoverFoodtoPoor Category:

Salesforce

SkillsRequired:SalesforceDeveloper

1. ProjectOverview

ProjectObjectives and Goals

Objective: This project aims to develop a Salesforce-based application designed to manageandstreamlinethedistributionofleftoverfoodtounderservedcommunities. The primary goal is to enhance the efficiency of food drop-offs, coordinate tasks, managevolunteers,andgenerateinsightfulreports.

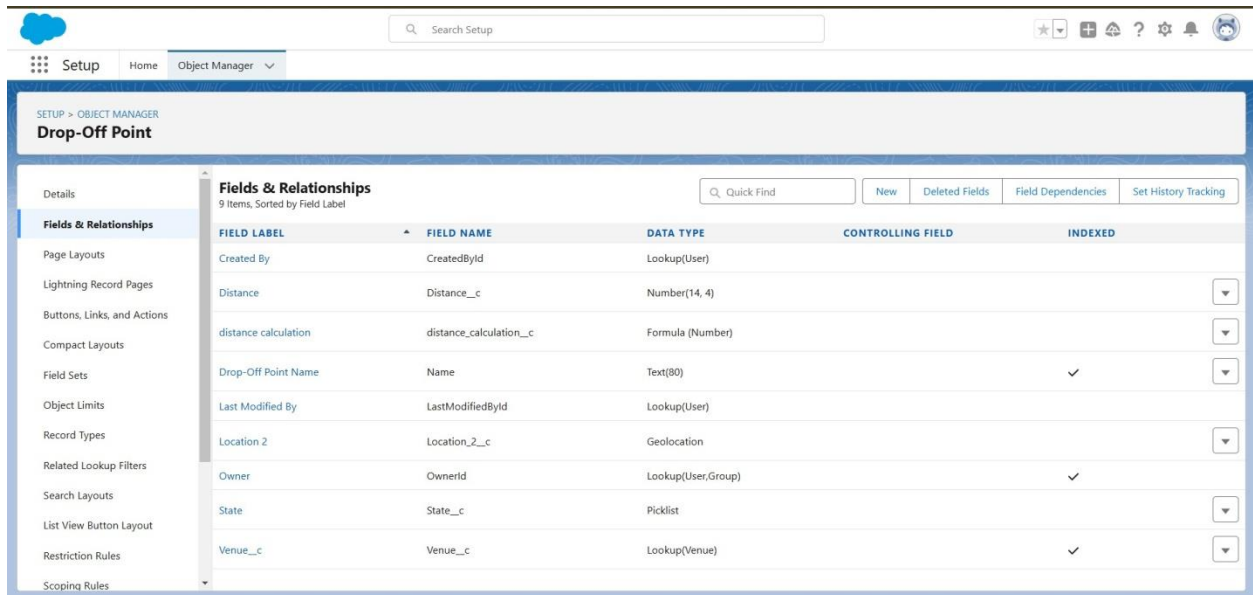2. DetailedDescriptionofImplementedFeatures

CustomObjects

1. Drop-OffPoint:

■ Purpose:TheDrop-OffPointobjectcapturesessentialdetailsaboutlocations

wherefoodisdroppedoff.Thishelpsintrackingandmanagingfooddistribution points

effectively.

■ Fields:

○ Drop-OffPointName:Atextfieldrepresentingthenameofthedrop-off point.

○ LocationDetails:Atextfieldforadditionaldetailsaboutthedrop-offpoint location.

○ Distance:Anumberfieldthatrecordsthedistancefromthedrop-offpoint to the

delivery area.

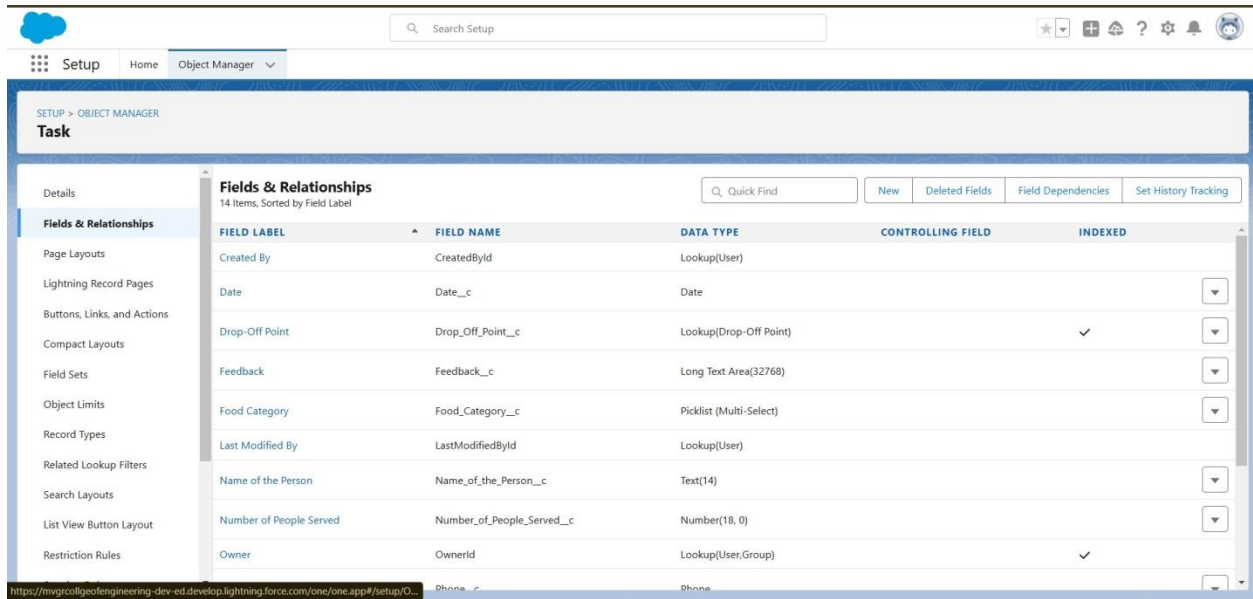○ Venue:AlookuprelationshipfieldlinkingtotheVenueobjecttoprovidea connection between drop-off points and venues.

2. Task:

■ Purpose:TheTaskobjectisusedtomanageandtrackvarioustasksrelatedto food distribution, including assigning tasks to volunteers and recording task details.

■ Fields:

○ TaskName:Atextfieldrepresentingthenameofthetask.

○ Date:Adatefieldindicatingwhenthetaskisscheduledorcompleted.

○ Rating:Anumericfieldusedtoratethetaskperformance.

○ Drop-OffPoint:AlookuprelationshipfieldlinkingtotheDrop-OffPoint object to associate tasks with specific drop-off points.

○ SponsoredBy:AlookuprelationshipfieldlinkingtotheDrop-OffPoint object to indicate the sponsor of the task.

3. Volunteer:

■ Purpose: The Volunteer object keeps strack of individuals who are involved in the food distribution process, including their contact information and assigned tasks.

■ Fields:

○ VolunteerName: A text field for the name of the volunteer.

○ ContactEmail: An email field for the volunteer's contact email.

○ ContactPhone: A phone field for the volunteer's contact number.

○ AssignedTasks: A related list showing tasks assigned to the volunteer

.

4. ExecutionDetail:

■ Purpose:TheExecutionDetailobjectcapturesdetailedinformationaboutfood distribution activities, including which volunteers and task are associated with each distribution.

■ Fields:

○ ExecutionDetailName:Atextfieldfornamingtheexecutiondetail record.

○ Volunteer:Amaster-detailrelationshipfieldlinkingtotheVolunteerobject to associate execution details with a specific volunteer.

○ Task:Amaster-detailrelationshipfieldlinkingtotheTaskobjectto associate execution details with a specific task.

○ Details:Atextfieldforadditionalinformationabouttheexecution.

ObjectRelationships

● Master-DetailRelationships:

■ ExecutionDetailtoVolunteer:Ensuresthateachexecutiondetailrecordislinked to a

volunteer, making volunteer information essential for each distribution

record.

■ ExecutionDetailtoTask:Ensuresthateachexecutiondetailrecordislinkedtoa task, making

task information essential for each distribution record.

● LookupRelationships:

■ TasktoDrop-OffPoint:Connectstaskstodrop-offpoints,providingcontexton where each

task is executed.

■ TasktoVolunteer:Connectstaskstovolunteers,enablingtrackingofwhich volunteer is

responsible for each task.

■ Drop-OffPointtoVenue:Linksdrop-offpointstovenues,facilitatingadetailed

understanding of where food is being dropped off.

SharingRules

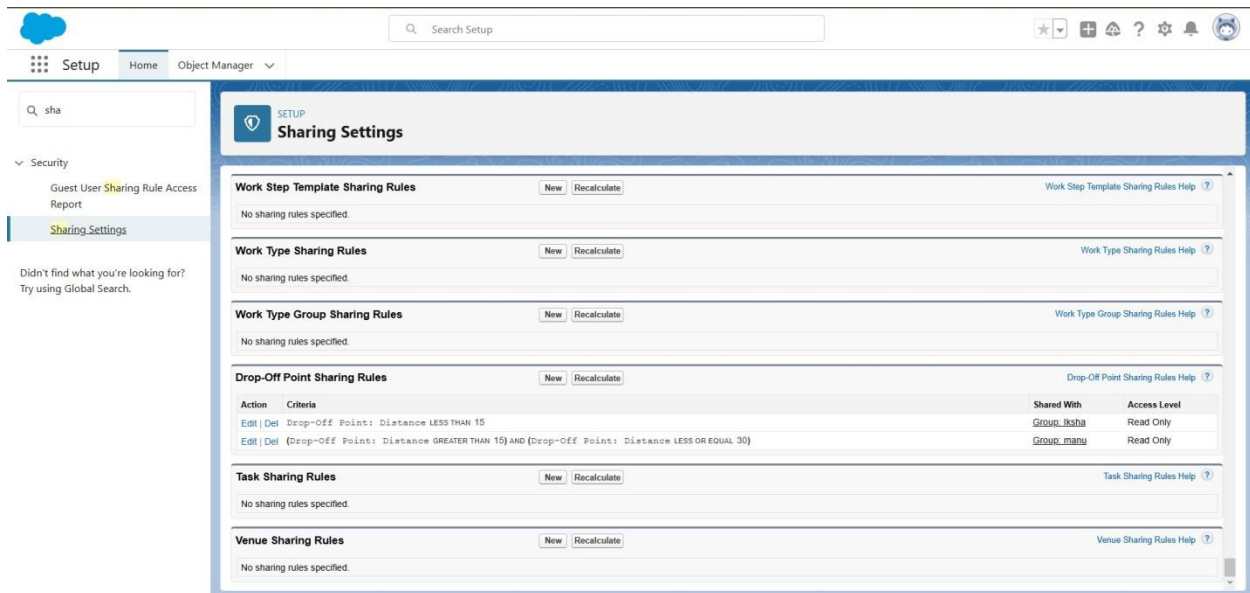Toensurethatrecordsaresharedappropriatelybasedondistancecriteria,thefollowing sharing

ruleswersetup:

● Rule1:

■ Label:Rule1

■ Criteria:Recordswherethedistanceislessthan15km

■ Access:SharedwithPublicGroup-Iksha

● Rule2:

■ Label:Rule2

■ Criteria:Recordswherethedistanceisbetween15kmand30km

■ Access:SharedwithPublicGroup-NSS

FlowandDashboard

● Flow:VenueFlow

■ Purpose:Tomanageandcapturedetailedinformationrelatedtofooddrop-off points.

■ Components:

○ TextComponent:Forenteringthevenuename.

○ EmailComponent:Forenteringthecontactemailofthevenue.

○ PhoneComponent:Forenteringthecontactphonenumberofthevenue.

○ TextComponent:Forenteringthevenuelocation.

○ NumberComponents:Forenteringlatitudeandlongitudevaluesofthevenue.
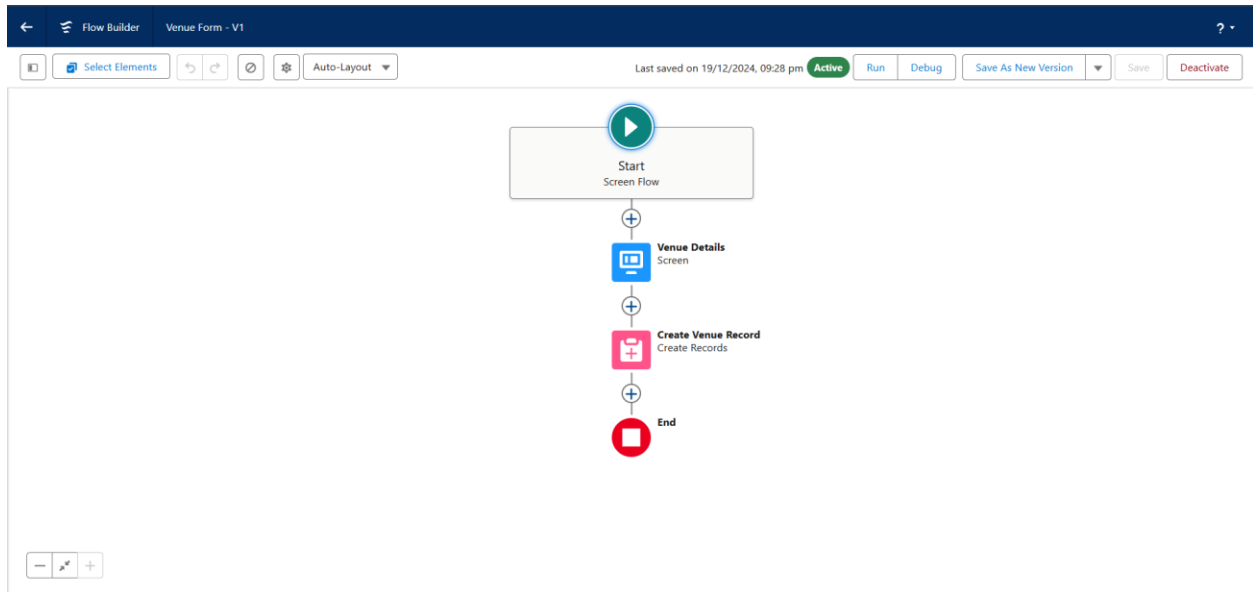
● Dashboard:

■ Name: OrganizationDetails

■ Components:

○ LightningTable: Displays detailed information about venues and drop-off points, facilitating a comprehensive view of the data.

3. ConfigurationandSetupInstructions

   CreatingCustomObjects

1. Drop-OffPoint:

■ NavigatetoObjectManager>Create>CustomObject.

■ Enterdetailssuchasthelabelname,recordname,andothersettingsforDrop Off Point.

2. Task:

■ NavigatetoObjectManager>Create>CustomObject.

■ Enterdetailssuchasthelabelname,recordname,andothersettingsforTask.

3. Volunteer:

■ NavigatetoObjectManager>Create>CustomObject.

■ Enterdetailssuchasthelabelname,recordname,andothersettingsfor Volunteer.

4. ExecutionDetail:

■ NavigatetoObjectManager>Create>CustomObject.

■ Enterdetailssuchasthelabelname,recordname,andothersettingsfor Execution

Detail.

   SharingRulesSetup

● GotoSharingSettings.

● Definenewsharingrulesfor Drop-OffPointbasedondistancecriteria,ensuring appropriate
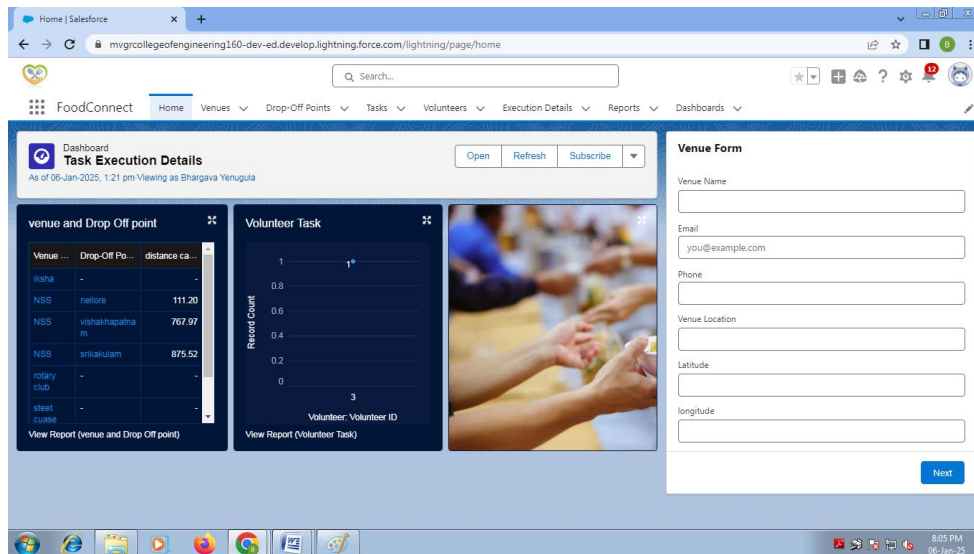
access for different public groups.

LightningAppBuilder

1. CreateHomePage:

■ GotoLightningAppBuilder>New.

■ SelectHomePageandnameit"HOMEPage".

■ AddFlowandDashboardcomponentstothepage.

2. SaveandActivate:

■ ClickonSaveandActivation.

■ SetthepageasthedefaultfortheFoodConnectapp.

ReportTypesandDashboards

1. CustomReportTypes:

■ CreatereporttypesforVenuewithDrop-OffwithVolunteerandVolunteerswith Execution

Details and Tasks.

2. Reports:

■ Generateandconfigurereportsusingthecustomreporttypestotrackand

analyserelevantdata.

3. Dashboards:

■ Configuredashboardstovisualisedatafromreportsandothercomponents, providing

insights into the overall distribution process.

4. Deliverables

● CodeFiles:IncludeApextriggersandanyothercodeimplemented.

● OutputScreenshots:Providescreenshotsofcustomobjects,flows,dashboards,and reports to

illustrate the setup.

● ProjectDocumentation:Detaileddescriptionsofimplementedfeatures,
configurations,

andsetupinstructions.

● ProjectDemonstrationVideo:Avideoshowcasingthefunctionalityoftheapplication, including

key features and processes.