

Project Title: To Supply Leftover Food to Poor

Category: Salesforce

Skills Required: Salesforce Developer

1. Project Overview

1.1 Project Objectives and Goals

Objective: This project aims to develop a Salesforce-based application designed to manage and streamline the distribution of leftover food to underserved communities.

The primary goal is to enhance the efficiency of food drop-offs, coordinate tasks, manage volunteers, and generate insightful reports.

2. Detailed Description of Implemented Features

2.1 Custom Objects

1. Drop-Off Point:

■ Purpose: The Drop-Off Point object captures essential details about locations where food is dropped off. This helps in tracking and managing food distribution points effectively.

■ Fields:

- Drop-Off Point Name: A text field representing the name of the drop-off point.
- Location Details: A text field for additional details about the drop-off point location.
- Distance: A number field that records the distance from the drop-off point to the delivery area.
- Venue: A lookup relationship field linking to the Venue object to provide a connection between drop-off points and venues.

Setup

Home

Object Manager

Search Setup

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SETUP > OBJECT MANAGER

Drop-Off Point

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Fields & Relationships

9 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Distance	Distance__c	Number(14, 4)		
distance calculation	distance_calculation__c	Formula (Number)		
Drop-Off Point Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Location 2	Location_2__c	Geolocation		
Owner	OwnerId	Lookup(User,Group)		✓
State	State__c	Picklist		
Venue	Venue__c	Lookup(Venue)		✓

2. Task:

- Purpose: The Task object is used to manage and track various tasks related to food distribution, including assigning tasks to volunteers and recording task details.
- Fields:
 - Task Name: A text field representing the name of the task.
 - Date: A date field indicating when the task is scheduled or completed.
 - Rating: A numeric field used to rate the task performance.
 - Drop-Off Point: A lookup relationship field linking to the Drop-Off Point object to associate tasks with specific drop-off points.
 - Sponsored By: A lookup relationship field linking to the Drop-Off Point object to indicate the sponsor of the task.

<div> <input type="text" value="Search Setup"/> <div> </div> </div>				
<div> <div>Setup</div> <div>Home</div> <div>Object Manager</div> </div>				
<div> <div>SETUP > OBJECT MANAGER</div> <div>Task</div> </div>				
<div> <div>Details</div> <div>Fields & Relationships</div> <div>Page Layouts</div> <div>Lightning Record Pages</div> <div>Buttons, Links, and Actions</div> <div>Compact Layouts</div> <div>Field Sets</div> <div>Object Limits</div> <div>Record Types</div> <div>Related Lookup Filters</div> <div>Search Layouts</div> <div>List View Button Layout</div> <div>Restriction Rules</div> <div>Scoping Rules</div> <div>Object Access</div> <div>Triggers</div> <div>Flow Triggers</div> <div>Validation Rules</div> <div>Conditional Field Formatting</div> </div>	<div> <div>Fields & Relationships</div> <div>13 Items, Sorted by Field Label</div> <div> <input type="text" value="Quick Find"/> <div> <div>New</div> <div>Deleted Fields</div> <div>Field Dependencies</div> <div>Set History Tracking</div> </div> </div> </div>			
	FIELD LABEL	FIELD NAME	DATA TYPE	INDEXED
	Created By	CreatedById	Lookup(User)	
	Date	Date__c	Date	
	Drop-Off Point	Drop_Off_Point__c	Lookup(Drop-Off Point)	✓
	Feedback	Feedback__c	Long Text Area(32768)	
	Food Category	Food_Category__c	Picklist (Multi-Select)	
	Last Modified By	LastModifiedById	Lookup(User)	
	Name of the Person	Name_of_the_Person__c	Text(20)	
	Number of People Served	Number_of_People_Served__c	Number(18, 0)	
	Owner	OwnerId	Lookup(User,Group)	✓
	Phone	Phone__c	Phone	
	Rating	Rating__c	Picklist	
	Task ID	Task_ID__c	Auto Number	
	Task Name	Name	Text(80)	✓

3. Volunteer:

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

■ **Fields:**

- **Volunteer Name:** A text field for the name of the volunteer.
- **Contact Email:** An email field for the volunteer's contact email.
- **Contact Phone:** A phone field for the volunteer's contact number.
- **Assigned Tasks:** A related list showing tasks assigned to the volunteer

Setup

Home

Object Manager

Search Setup

4. Execution Detail:

■ **Purpose:** The Execution Detail object captures detailed information about food distribution activities, including which volunteers and task are associated with each distribution.

■ **Fields:**

- **Execution Detail Name:** A text field for naming the execution detail record.
- **Volunteer:** A master-detail relationship field linking to the Volunteer object to associate execution details with a specific volunteer.
- **Task:** A master-detail relationship field linking to the Task object to associate execution details with a specific task.
- **Details:** A text field for additional information about the execution.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Execution Detail Name	Name	Text(80)		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Task	Task__c	Master-Detail(Task)		✓
Volunteer	Volunteer__c	Master-Detail(Volunteer)		✓

2.2 Object Relationships

● Master-Detail Relationships:

■ Execution Detail to Volunteer: Ensures that each execution detail record is linked to a volunteer, making volunteer information essential for each distribution record.

■ Execution Detail to Task: Ensures that each execution detail record is linked to a task, making task information essential for each distribution record.

● Lookup Relationships:

■ Task to Drop-Off Point: Connects tasks to drop-off points, providing context on where each task is executed.

■ Task to Volunteer: Connects tasks to volunteers, enabling tracking of which volunteer is responsible for each task.

■ Drop-Off Point to Venue: Links drop-off points to venues, facilitating a detailed understanding of where food is being dropped off.

2.3 Sharing Rules

To ensure that records are shared appropriately based on distance criteria, the following sharing rules were set up:

● Rule 1:

■ Label: Rule 1

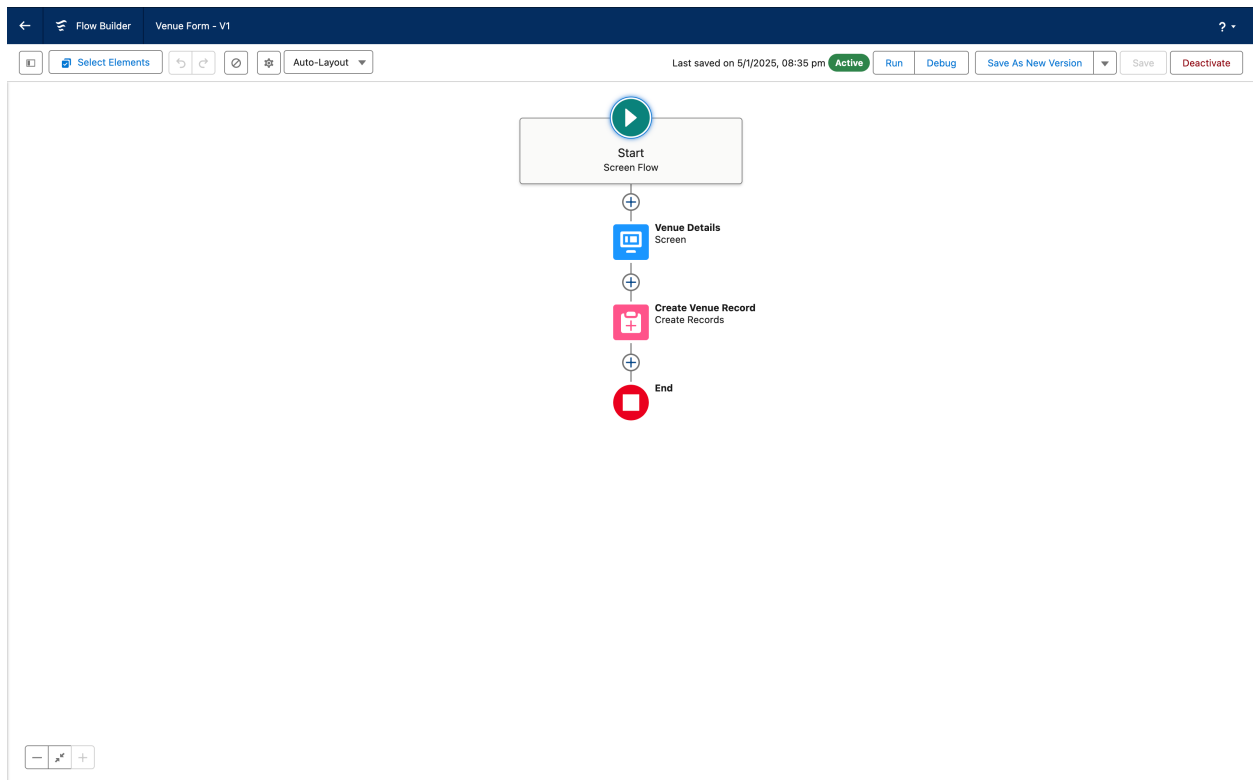
- Criteria: Records where the distance is less than 15 km
- Access: Shared with Public Group - Iksha
- Rule 2:
- Label: Rule 2
- Criteria: Records where the distance is between 15 km and 30 km
- Access: Shared with Public Group - NSS

The screenshot displays the 'Sharing Settings' page in Salesforce Setup. The left sidebar shows the navigation menu with 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Sharing Settings' and lists various sharing rule categories. The 'Drop-Off Point Sharing Rules' section is expanded, showing a table of rules.

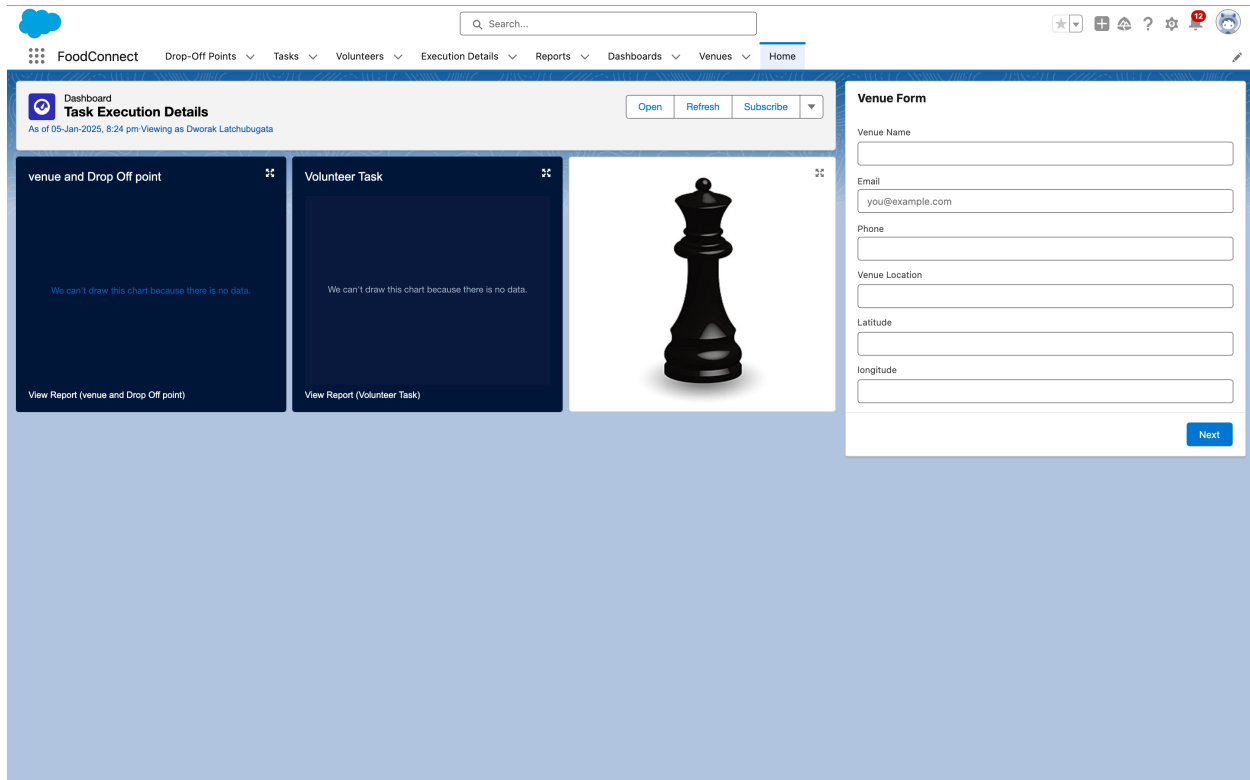
Action	Criteria	Shared With	Access Level
Edit Del	Drop-Off Point: Distance LESS THAN 15	Group: Iksha	Read Only
Edit Del	(Drop-Off Point: Distance GREATER THAN 15) AND (Drop-Off Point: Distance LESS OR EQUAL 30)	Group: NSS	Read Only
Edit Del	(Drop-Off Point: Distance GREATER THAN 30) AND (Drop-Off Point: Distance LESS OR EQUAL 50)	Group: Street Cause	Read Only

2.4 Flow and Dashboard

- Flow: Venue Flow
- Purpose: To manage and capture detailed information related to food drop-off points.
- Components:
 - Text Component: For entering the venue name.
 - Email Component: For entering the contact email of the venue.
 - Phone Component: For entering the contact phone number of the venue.
 - Text Component: For entering the venue location.
 - Number Components: For entering latitude and longitude values of the venue.



- Dashboard:
- Name: Organization Details
- Components:
 - Lightning Table: Displays detailed information about venues and drop-off points, facilitating a comprehensive view of the data.



3. Configuration and Setup Instructions

3.1 Creating Custom Objects

1. Drop-Off Point:

- Navigate to Object Manager > Create > Custom Object.
- Enter details such as the label name, record name, and other settings for Drop Off Point.

2. Task:

- Navigate to Object Manager > Create > Custom Object.
- Enter details such as the label name, record name, and other settings for Task.

3. Volunteer:

- Navigate to Object Manager > Create > Custom Object.
- Enter details such as the label name, record name, and other settings for Volunteer.

4. Execution Detail:

- Navigate to Object Manager > Create > Custom Object.
- Enter details such as the label name, record name, and other settings for Execution Detail.

3.2 Sharing Rules Setup

- Go to Sharing Settings.
- Define new sharing rules for Drop-Off Point based on distance criteria, ensuring

appropriate access for different public groups.

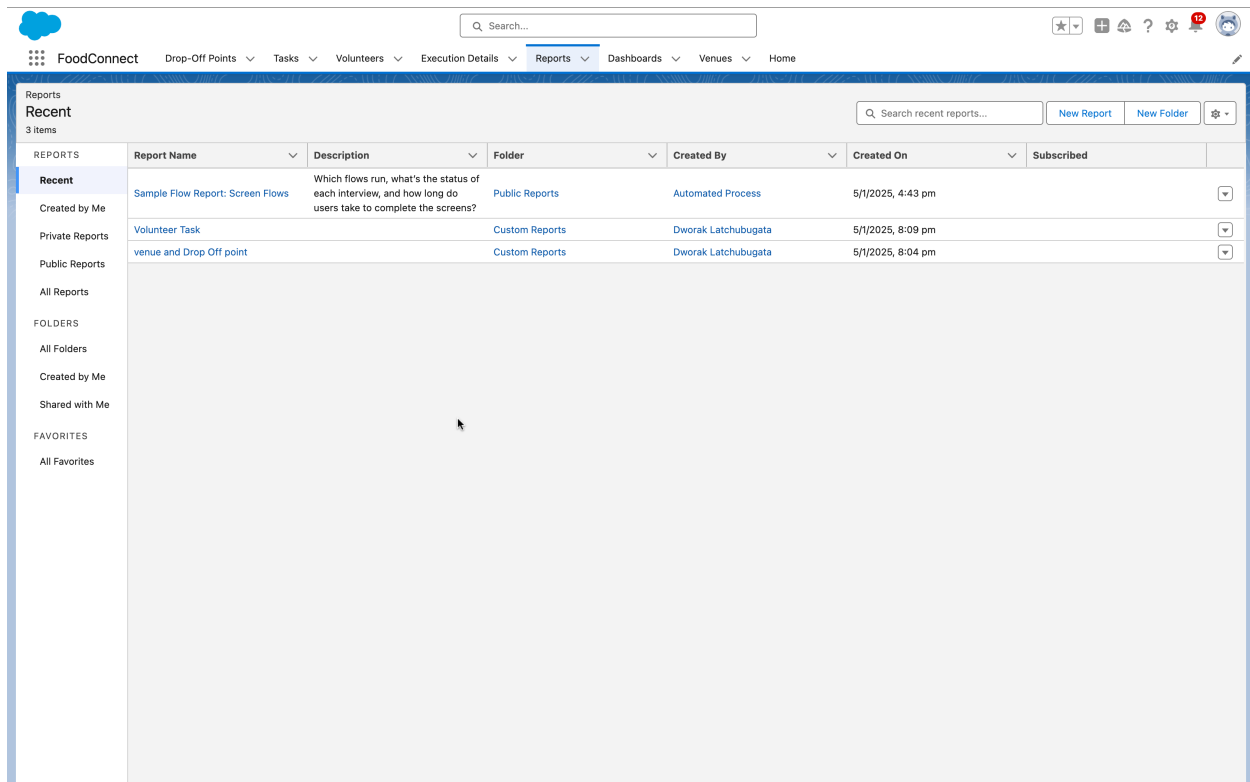
3.3 Lightning App Builder

1. Create Home Page:

- Go to Lightning App Builder > New.
- Select Home Page and name it "HOME Page".
- Add Flow and Dashboard components to the page.

2. Save and Activate:

- Click on Save and Activation.
- Set the page as the default for the FoodConnect app.



3.4 Report Types and Dashboards

1. Custom Report Types:

- Create report types for Venue with Drop-Off with Volunteer and Volunteers with Execution Details and Tasks.

2. Reports:

- Generate and configure reports using the custom report types to track and analyse relevant data.

3. Dashboards:

- Configure dashboards to visualise data from reports and other components, providing insights into the overall distribution process.

4. Deliverables

- Code Files: Include Apex triggers and any other code implemented.
- Output Screenshots: Provide screenshots of custom objects, flows, dashboards, and reports to illustrate the setup.
- Project Documentation: Detailed descriptions of implemented features, configurations, and setup instructions.
- Project Demonstration Video: A video showcasing the functionality of the application, including key features and processes.