

# **SALESFORCE CRM PROJECT**

## **PROJECT NAME : TO SUPPLY LEFTOVER FOOD TO POOR**

### **PROJECT OVERVIEW :**

This project aims to streamline the process of leftover food distribution using salesforce.

- **Goal:** Facilitate efficient redistribution of excess food to reduce waste and combat hunger
- **Impact:** Minimizes food wastage, supports the needy, and improves coordination of collection centers, volunteers, and task management.
- **Technology:** Salesforce tools manage records, workflows, and data visualization, ensuring seamless operations.

### **OBJECTIVE :**

The project targets both social upliftment and operational optimization.

#### **Business Objectives:**

- Address food wastage and hunger simultaneously.
- Enhance transparency, accountability, and workflow efficiency.

#### **Deliverables:**

- Custom Salesforce Objects (e.g., Drop-off Points, Volunteers, Tasks, and Execution Logs).
- Dashboards and reports for performance insights.
- Automated workflows to ensure smooth process execution

### **PHASE – 1 : Requirement Analysis & Planning**

**PROBLEM STATEMENT :** Global food insecurity reports show millions go hungry while edible food is wasted daily. To bridge this gap, the "Food Connect" platform was conceptualized—linking food donors with recipients in need.

#### **SOLUTION :**

The Food Connect app simplifies community-driven food redistribution:

Individuals can report surplus food donations.

The nearest volunteer receives automatic alerts with exact pickup locations.

Volunteers collect the food and deliver it to the designated drop-off points.

The system enables nationwide support through a broad network of volunteers.

## OBJECTIVE :

The main goals and objectives of this project are :

- Identify the gap between surplus food availability and those who are hungry.
- Define system requirements to create a reliable digital platform for food redistribution.
- Set a foundation for building a solution—Food Connect—that acts as a bridge between contributors and beneficiaries.
- Engage stakeholders including donors, volunteers, and distribution points to gather functional needs.
- Prepare a roadmap for development, outlining how Salesforce will be used to manage records, automate notifications, and track food movement

## PHASE – 2 : Salesforce Development – Backend & Configurations

### STEP – 1 : Visit the Signup Page:

- Open your browser and go to:  
<https://developer.salesforce.com/signup>

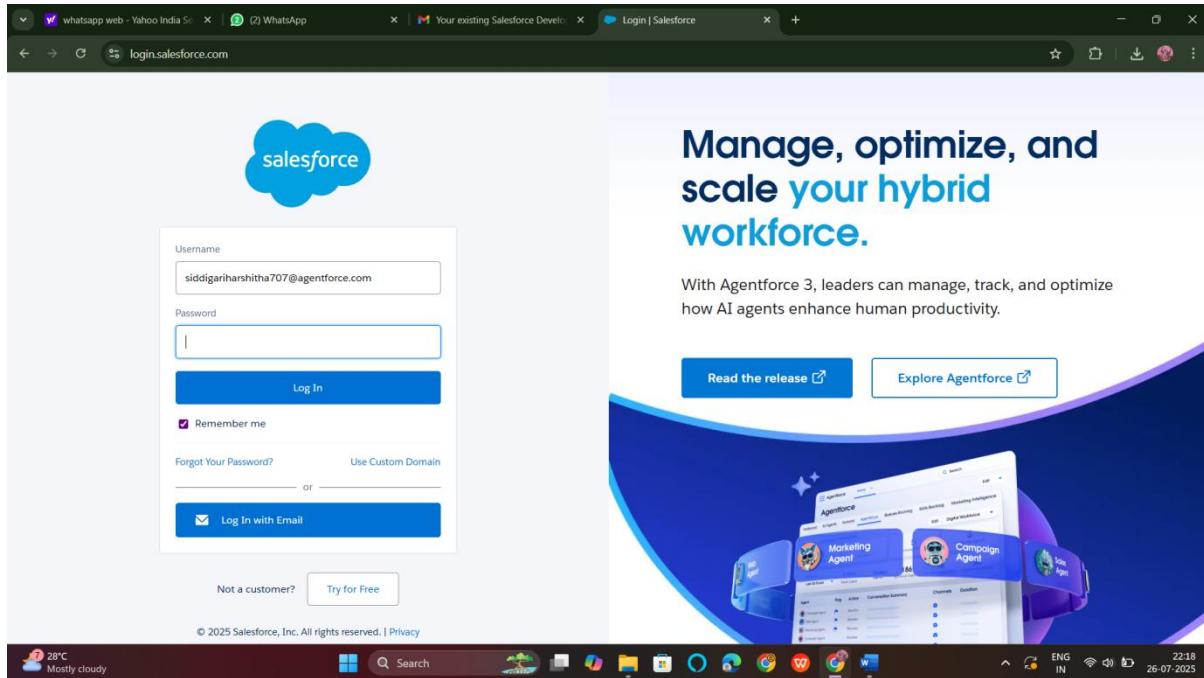
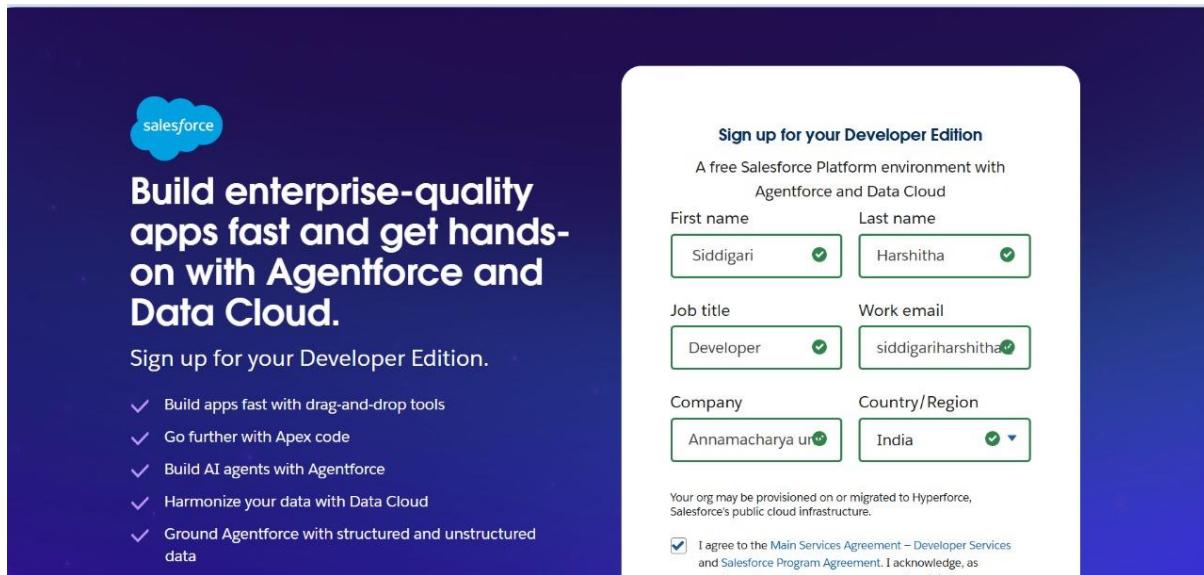
### STEP -2: Fill in the Registration Form:

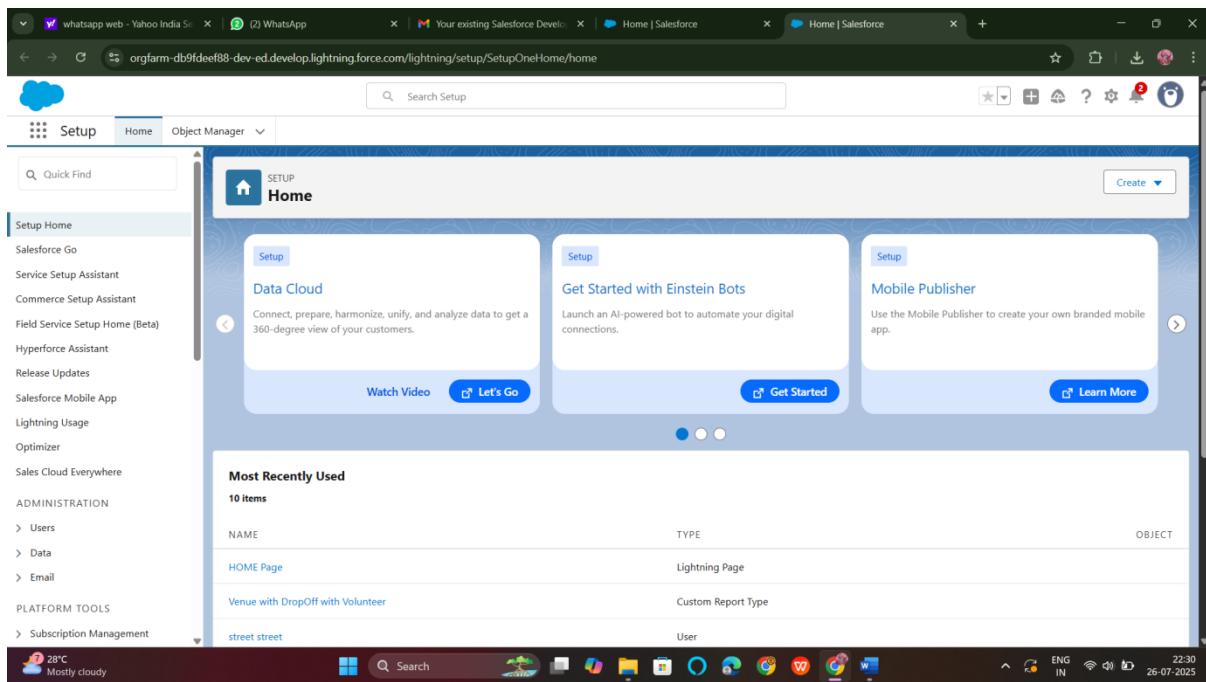
- **First Name and Last Name**
- **Email Address** (use a valid one—you'll receive a confirmation)
- **Role** (e.g., Developer)
- **Company Name** (can be your college, organization, or just "Self")
- **Country** (select your location)
- **Postal Code**
- **Username** (must be in email format, like `yourname@yourdomain.com`, but doesn't need to be a real email)

### STEP -3: Agree to Terms:

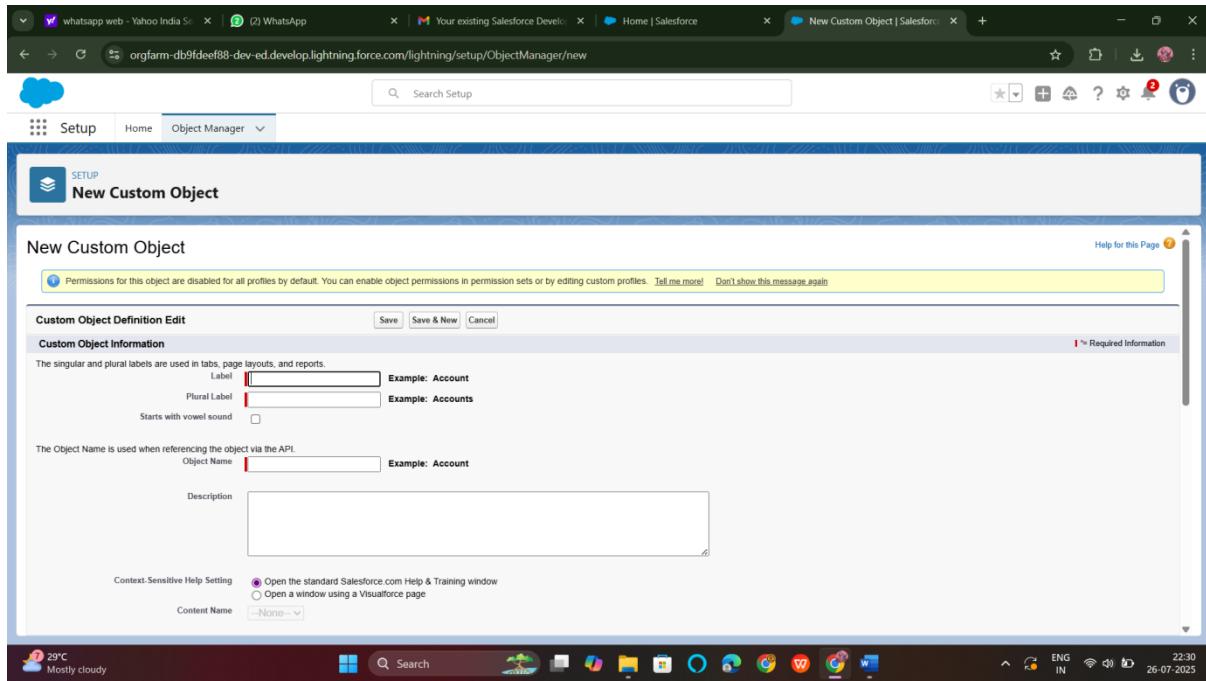
- Check the box to agree to the Salesforce terms.
- **Click "Sign Me Up":**
  - You will receive an activation email. Click the link in that email to verify your account.
- **Set Your Password:**

- After clicking the email link, you'll be prompted to set a password and a security question.
- **Access Your Salesforce Developer Homepage:**
- Once set, you'll land on the **Salesforce Developer Edition Home Page** (Lightning Experience by default).





**STEP – 2 :** In the second step we create the objects and add the necessary fields to the related object we have different fields for donation , volunteers , execution and many more .



Screenshot of the Salesforce Setup interface showing the "Execution Detail" object details.

**Object Manager**

**Execution Detail**

**Details**

**Description**

**API Name:** Execution\_Detail\_c

**Custom:** ✓

**Singular Label:** Execution Detail

**Plural Label:** Execution Details

**Enable Reports:** ✓

**Track Activities:** ✓

**Track Field History:** ✓

**Deployment Status:** Deployed

**Help Settings:** Standard salesforce.com Help Window

**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

Top Stories Students to learn...

22:31 26-07-2025

Screenshot of the Salesforce Setup interface showing the "Volunteer" object details.

**Object Manager**

**Volunteer**

**Details**

**Description**

**API Name:** Volunteer\_c

**Custom:** ✓

**Singular Label:** Volunteer

**Plural Label:** Volunteers

**Enable Reports:** ✓

**Track Activities:** ✓

**Track Field History:** ✓

**Deployment Status:** Deployed

**Help Settings:** Standard salesforce.com Help Window

**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

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Screenshot of the Salesforce Setup Object Manager for the Task object.

**Task**

**Details**

**Description**

**API Name:** Task\_c

**Custom:** ✓

**Singular Label:** Task

**Plural Label:** Tasks

**Enable Reports:** ✓

**Track Activities:** ✓

**Track Field History:** ✓

**Deployment Status:** Deployed

**Help Settings:** Standard salesforce.com Help Window

**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**

22:32 ENG IN 26-07-2025

Screenshot of the Salesforce Setup Object Manager for the Drop-Off Point object.

**Drop-Off Point**

**Details**

**Description**

**API Name:** Drop\_Off\_Point\_c

**Custom:** ✓

**Singular Label:** Drop-Off Point

**Plural Label:** Drop-Off Points

**Enable Reports:** ✓

**Track Activities:** ✓

**Track Field History:** ✓

**Deployment Status:** Deployed

**Help Settings:** Standard salesforce.com Help Window

**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**

https://orgfarm-db9fdeef88-dev-ed.lightning.force.com/one/one.app#/setup/ObjectManager/01lgL000001CT27/RestrictionRules/view

22:32 ENG IN 26-07-2025

**Object Manager - Venue**

**Details**

Description

API Name: **Venue\_\_c**

Custom:

- Singular Label: **Venue**
- Plural Label: **Venues**

Enable Reports: ✓

Track Activities: ✓

Track Field History: ✓

Deployment Status: **Deployed**

Help Settings: Standard salesforce.com Help Window

<https://orgfarm-db9fdeef88-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/home>

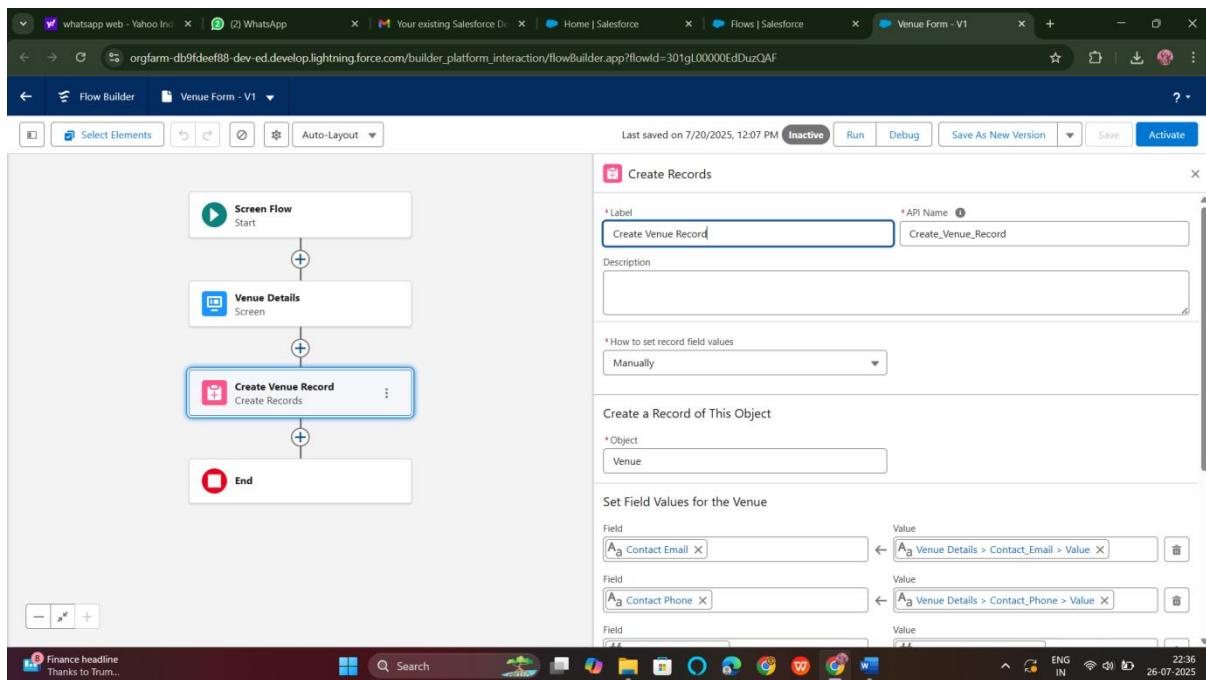
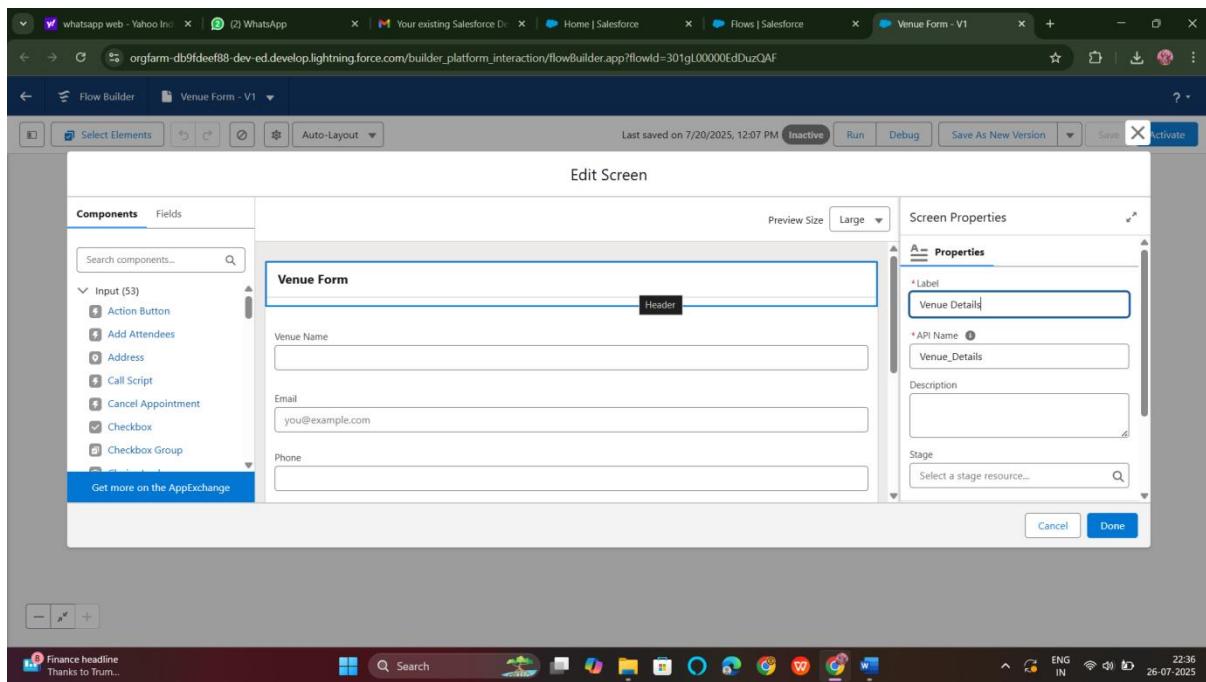
**Object Manager**

108+ items. Sorted by Label

Object	Type	Created
Digital Wallet	DigitalWallet	Standard Object
Drop-Off Point	Drop_Off_Point__c	Custom Object
Duplicate Record Item	DuplicateRecordItem	Standard Object
Duplicate Record Set	DuplicateRecordSet	Standard Object
Email Message	EmailMessage	Standard Object
Engagement Channel Type	EngagementChannelType	Standard Object
Engagement Channel Work Type	EngagementChannelWorkType	Standard Object
Entitlement	Entitlement	Standard Object
Entitlement Contact	EntitlementContact	Standard Object
Event	Event	Standard Object
Execution Detail	Execution_Detail__c	Custom Object
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object
Finance Transaction	FinanceTransaction	Standard Object

<https://orgfarm-db9fdeef88-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/home>

**STEP – 3 :** In this step we create a flow with the name venue form that flow consists of all the details that should be present in the form which includes the volunteer details the donation details and execution details . Along with that we have also the details of the drop off point .



Venue Form

Venue Name

Email

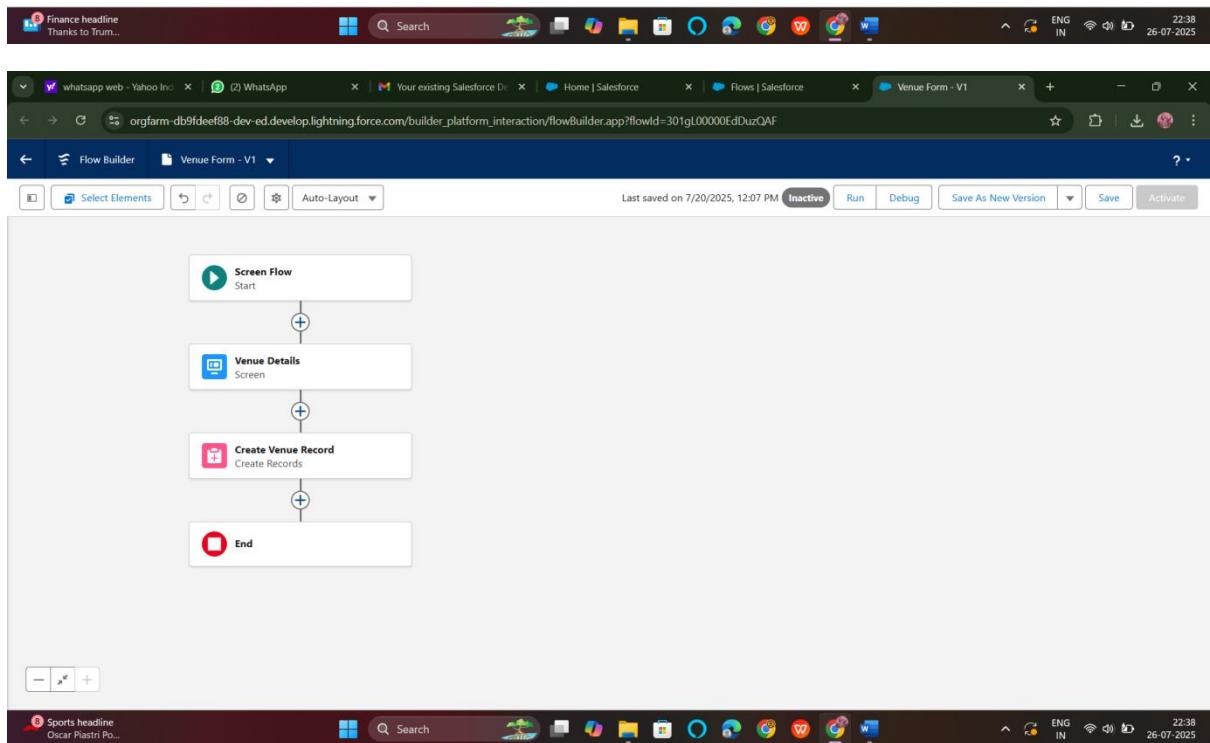
Phone

Venue Location

Latitude

Longitude

**Next**



Step – 4 : In this step we create a trigger which helps in the drop off point work .

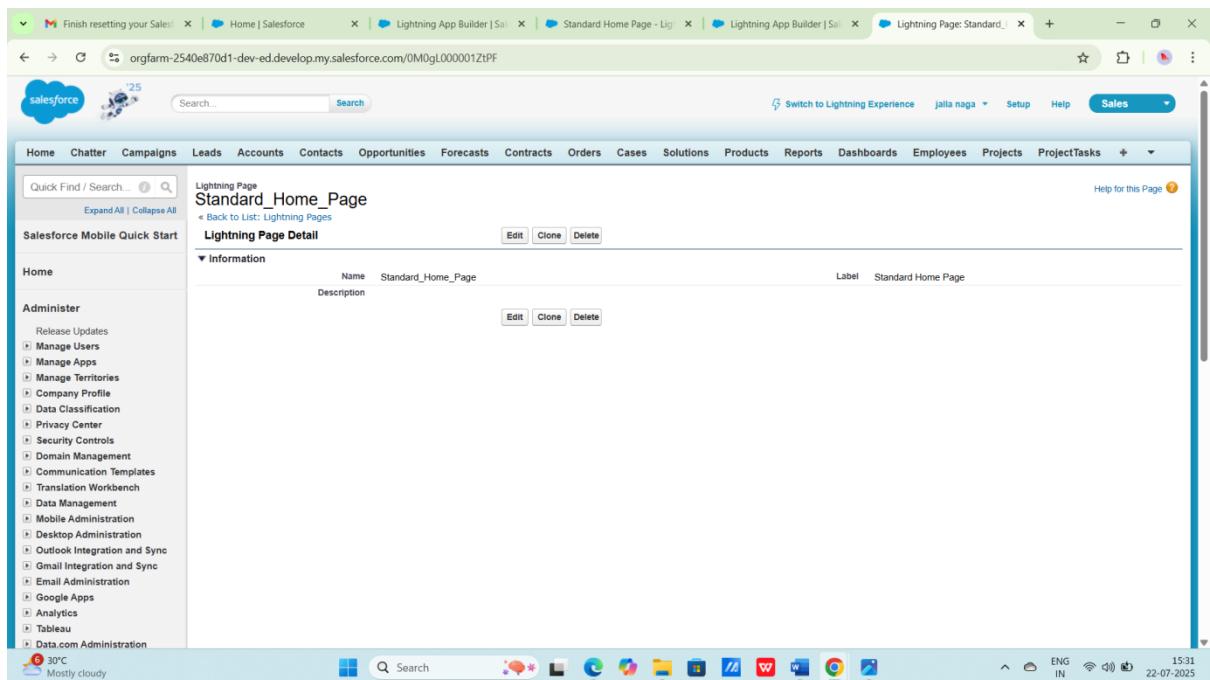
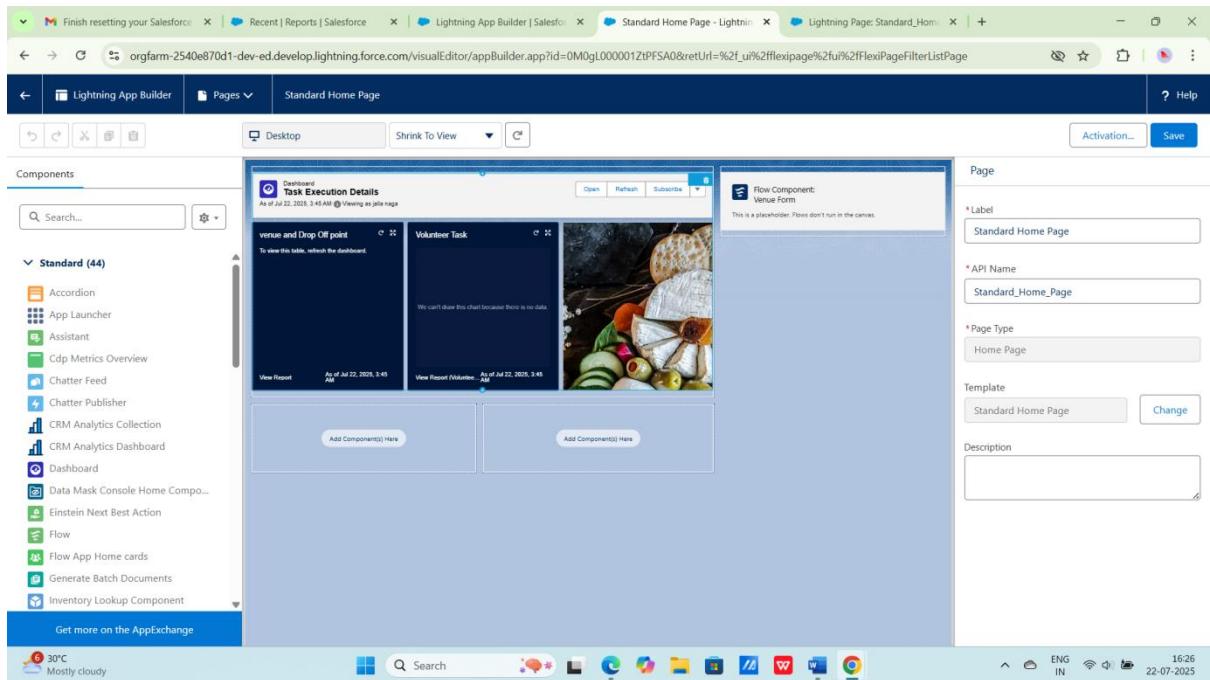
```

trigger DropOffTrigger on Drop_Off_point__c (before insert) {
    for(Drop_Off_point__c Drop : Trigger.new){
        Drop.Distance__c = Drop.distance_calculation__c;
    }
}

```

## PHASE – 3 : UI / UX Development & Customization :

STEP – 1 : In this we create a lightning app builder which helps us to create or build the over all structure of the app that help us in the further process .



**STEP – 2 :** In this we create the reports these reports help us to include all the details and all the fields that are needed to be included in the app .

REPORT ▾

Volunteer Task ✓ Drop-Off Points with Volunteers with Execution Details

Fields > Outline Filters ?

Groups

- GROUP ROWS Add group...
- Volunteer ID  X

GROUP COLUMNS

- Add group...

Columns

- Add column...
- Volunteer: Volunteer Name  X
- Task: Task Name  X
- Execution Detail Name  X
- Owner: Full Name  X
- Volunteer Name  X
- Created Date  X

Previewing a limited number of records. Run the report to see everything.

Volunteer ID ↑  Volunteer: Volunteer Name  Task: Task Name  Execution Detail Name  Owner: Full Name  Volunteer Name  Created Date

No records returned in preview. Try running the report or editing report filters.

- Show All drop-off points
- Set the Created Date filter to All Time.
- Edit other filters in the filter panel.

Update Preview Automatically

Row Counts  Detail Rows  Subtotals  Grand Total

29°C Mostly cloudy ENG IN 22:57 26-07-2025

REPORT ▾

venue and Drop Off point ✓ Venue with DropOff with Volunteer

Fields > Outline Filters ?

Groups

- GROUP ROWS Add group...
- Volunteer Name  X

GROUP COLUMNS

- Add group...

Columns

- Add column...
- Venue Name  X
- Drop-Off Point Name  X
- # Distance  X

Previewing a limited number of records. Run the report to see everything.

Volunteer Name ↑  Venue Name  Drop-Off Point Name  Distance

No records returned in preview. Try running the report or editing report filters.

- Show All venues.
- Set the Created Date filter to All Time.
- Edit other filters in the filter panel.

Update Preview Automatically

Row Counts  Detail Rows  Subtotals  Grand Total  Conditional Formatting

29°C Mostly cloudy ENG IN 22:58 26-07-2025

REPORT ▾

Sample Flow Report: Screen Flows ▾ Screen Flows

No results found

Flow API Name	Interview Status	Sum of Element Duration in Minutes	Average Element Duration in Minutes	Record Count

Reports

Recent

3 items

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Volunteer Task		Custom Reports	Siddigari Harshitha	7/20/2025, 6:04 AM	
Created by Me	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	7/10/2025, 8:55 PM	
Private Reports	venue and Drop Off point		Custom Reports	Siddigari Harshitha	7/20/2025, 5:49 AM	
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

**STEP – 3 :** In this step we create two different dashboards the first one is the organizational details dashboard where we include the reports .

The second dashboard is the task-executional dashboard which acts also as the home page of the app . These two dashboards one is a custom dashboard that is which acts as the home page and the next is the private dashboard that display the details .

The screenshot shows a web browser window with multiple tabs open. The active tab is 'Recent | Dashboards | Salesforce' at the URL <https://orgfarm-db9fdeef88-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru>. The page displays a list of recent dashboards. On the left, there's a sidebar with navigation links for Dashboards, Recent, Created by Me, Private Dashboards, All Dashboards, Folders, All Folders, Created by Me, Shared with Me, Favorites, and All Favorites. The main content area shows a table with columns: Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. Two items are listed:

DASHBOARD	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Task Execution Details	Custom Dashboards	Siddigari Harshitha	7/20/2025, 6:17 AM		
Created by Me	Organization Details	Private Dashboards	Siddigari Harshitha	7/20/2025, 6:07 AM		

The bottom status bar shows system information: ENG IN 08:40 27-07-2025.

The screenshot shows a web browser window with multiple tabs open. The active tab is 'Organization Details | Salesforce' at the URL <https://orgfarm-db9fdeef88-dev-ed.develop.lightning.force.com/lightning/r/01Zg1000002m7qrUAA/view?queryScope=userFolders>. The page displays the 'Organization Details' dashboard. At the top, it says 'Dashboard Organization Details' and 'Viewing as Siddigari Harshitha'. Below this, there are two main sections: 'venue and Drop Off point' and 'Volunteer Task'. The 'venue and Drop Off point' section has a note: 'To view this table, refresh the dashboard.' The 'Volunteer Task' section has a note: 'No data. Try refreshing the dashboard.' The bottom status bar shows system information: 27°C Mostly cloudy ENG IN 23:03 26-07-2025.

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar More

Dashboard Task Execution Details As of Jul 26, 2025, 10:14 AM Viewing as Siddigari Harshitha

venue and Drop Off point As of Jul 26, 2025, 10:14 AM

Volunteer Task As of Jul 26, 2025, 10:14 AM

We can't draw this chart because there is no data.

We can't draw this chart because there is no data.

View Report (venue and Drop Off point) View Report (Volunteer Task)

To Do List

28°C Mostly cloudy Search ENG IN 26-07-2025 22:44

## PHASE – 4 : Data Migration , Testing & Security :

All the setup and creation of the App has been completed now we have to add the data into the app and then do the testing and give security .

Firstly we add the data into the page it takes the details in the venue form page and we fill those details .

Venue Form

Venue Name

Email

you@example.com

Phone

Venue Location

Latitude

longitude

Next

NZ SA Game score Search ENG IN 26-07-2025 23:05

Venue Form

Venue Name  
harshi

Email  
harshi@gmail.com

Phone  
9059710500

Venue Location  
Nandyal

Latitude  
86

Longitude  
14

**Next**



After including the details just check if it showing any error or are there any inappropriate values entered into the fields.

At the last now to maintain the security and avoid any problems in the work flow of the apps we include the rules and settings in a particular way to ensure that all the details and records are safe in the app.

SETUP Public Groups

Group Iksha

Name	Type
Siddigari Harshitha	User
Iksha Foundation	User

Help for this Page ⓘ

View All Users

The screenshot shows the Salesforce Setup interface under the 'Public Groups' section. A search bar at the top right contains the text 'Search Setup'. Below it, a navigation bar includes 'Setup', 'Home', and 'Object Manager'. A sidebar on the left has a search bar with 'public gr' and a 'Users' section with a 'Public Groups' tab selected.

**Public Groups**

**Group ssn**

Label ssn  
Group Name ssn  
Grant Access Using Hierarchies ✓  
Description  
Created By Siddigari.Harshitha, 7/20/2025, 1:59 AM Modified By Siddigari.Harshitha, 7/20/2025, 1:59 AM

**View All Users**

Name	Type
Siddigari.Harshitha	User
ssn.ssn	User

The screenshot shows the Salesforce Setup interface under the 'Public Groups' section. A search bar at the top right contains the text 'Search Setup'. Below it, a navigation bar includes 'Setup', 'Home', and 'Object Manager'. A sidebar on the left has a search bar with 'public gr' and a 'Users' section with a 'Public Groups' tab selected.

**Public Groups**

A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.

**View:** All | Edit | Create New | View

Action	Label	Group Name	Created By	Created Date
Edit   Del	itsna	itsna	Harshitha_Siddigari	7/20/2025, 1:58 AM
Edit   Del	ssn	ssn	Harshitha_Siddigari	7/20/2025, 1:59 AM
Edit   Del	street	street	Harshitha_Siddigari	7/20/2025, 1:59 AM

Sharing Settings

Setup Drop-Off Point Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

Label: Rule 1  
Rule Name: Rule\_1  
Description:

Step 1: Select your rule type

Criteria	Field	Operator	Value	AND
Distance	less than	15		AND
None	None			AND
None	None			AND
None	None			AND
None	None			

Additional Options:  Include records owned by users who can't have an assigned role

Share with: Group: ikha

Add Filter Logic

Help for this Page

The screenshot shows the Salesforce Sharing Settings page. A new sharing rule is being created with the following details:

- Label:** Rule 2
- Rule Name:** Rule\_2
- Description:** (empty)

**Step 1: Select your rule type**

Criteria	Field	Operator	Value	Logic
Distance	Distance	greater than	15	AND
Distance	Distance	less or equal	30	AND
None	Distance	None	None	AND
None	Distance	None	None	AND
None	Distance	None	None	AND

**Additional Options:**  Include records owned by users who can't have an assigned role

**Share with:** Group: ssn

**Access Level:** Report Only

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. A new sharing rule is being created with the following details:

- Label:** Rule 3
- Rule Name:** Rule\_3
- Description:** (empty)
- Criteria:**

Criteria	Field	Operator	Value	Logical Operator
1	Distance	greater than	30	AND
2	Distance	less or equal	50	AND
3	-None-	-None-		AND
4	-None-	-None-		AND
5	-None-	-None-		
- Additional Options:** Include records owned by users who can't have an assigned role.
- Share with:** Group: street
- Access Level:** Read Only

The rule is modified by Siddhanti Harshitha on 7/20/2025, 6:27 AM.

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup, displaying the following sharing rules:

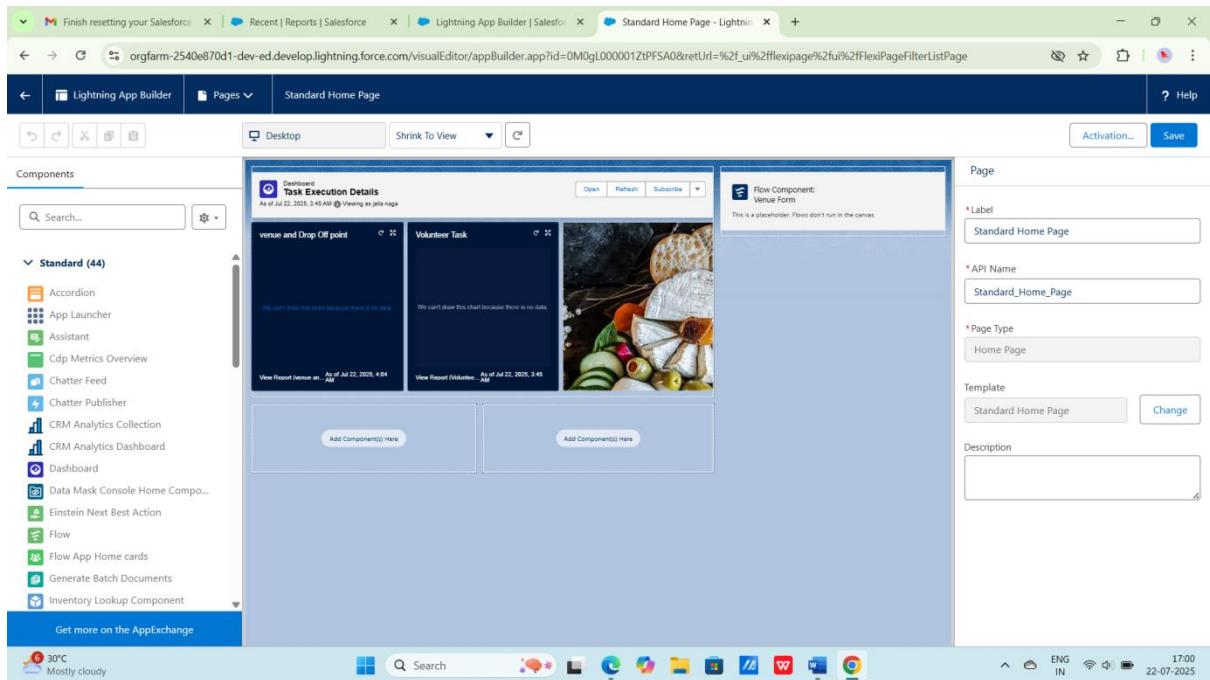
- Work Step Template Sharing Rules:** No sharing rules specified.
- Work Type Sharing Rules:** No sharing rules specified.
- Work Type Group Sharing Rules:** No sharing rules specified.
- Drop-Off Point Sharing Rules:**

Action	Criteria	Shared With	Access Level
Edit   Del	(Drop-Off Point: Distance LESS THAN 15)	Group_itsa	Read Only
Edit   Del	(Drop-Off Point: Distance GREATER THAN 15) AND (Drop-Off Point: Distance LESS OR EQUAL 30)	Group_ssn	Read Only
Edit   Del	(Drop-Off Point: Distance GREATER THAN 30) AND (Drop-Off Point: Distance LESS OR EQUAL 50)	Group_street	Read Only
- Task Sharing Rules:** No sharing rules specified.
- Venue Sharing Rules:** No sharing rules specified.

## PHASE – 5 :Deployment , Documentation & Maintenance :

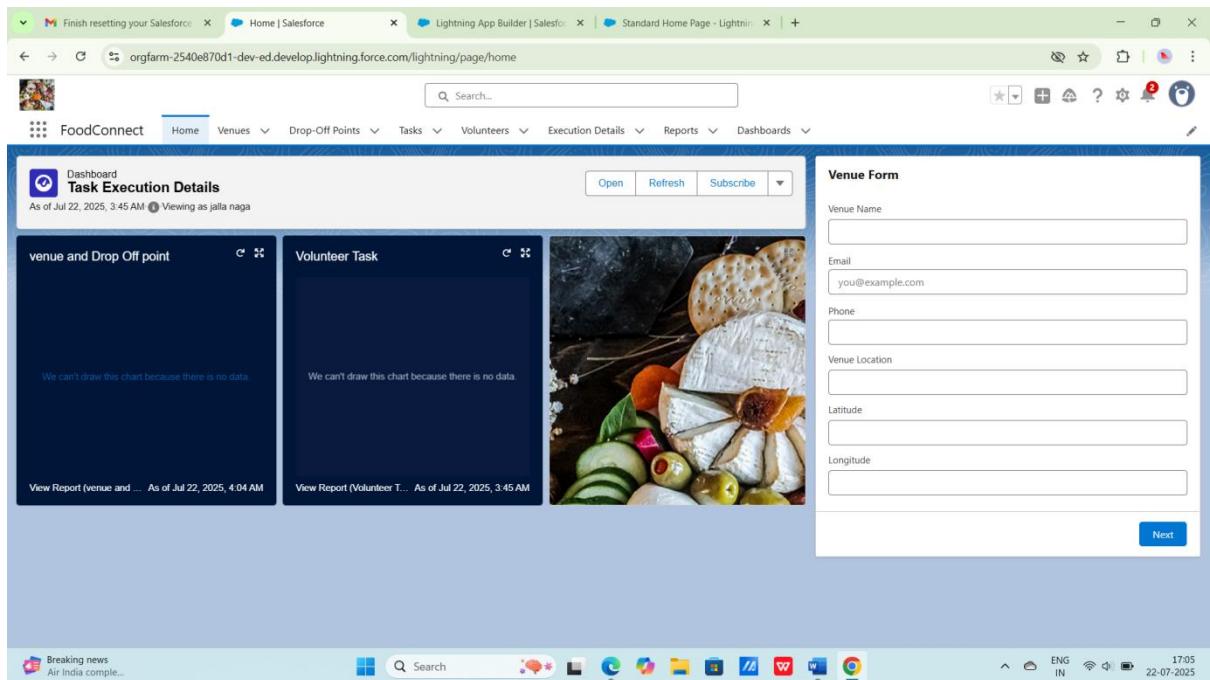
This is the last step or the last phase of the project.

In this phase we generate the home page by adding our app the Food Connect to the app defaulter that generates the home page of the app.



After connecting the Food Connect app to app defaulter the home page will be generated and it will look like this.

We can in addition also add a few pictures related to the work we do and with that we can update it day to day by adding more information like our day to day work pictures details of what we do with that we can also add the donor names if they are willing.



This screenshot shows a Salesforce Lightning interface for a venue record. The main area displays the venue details:

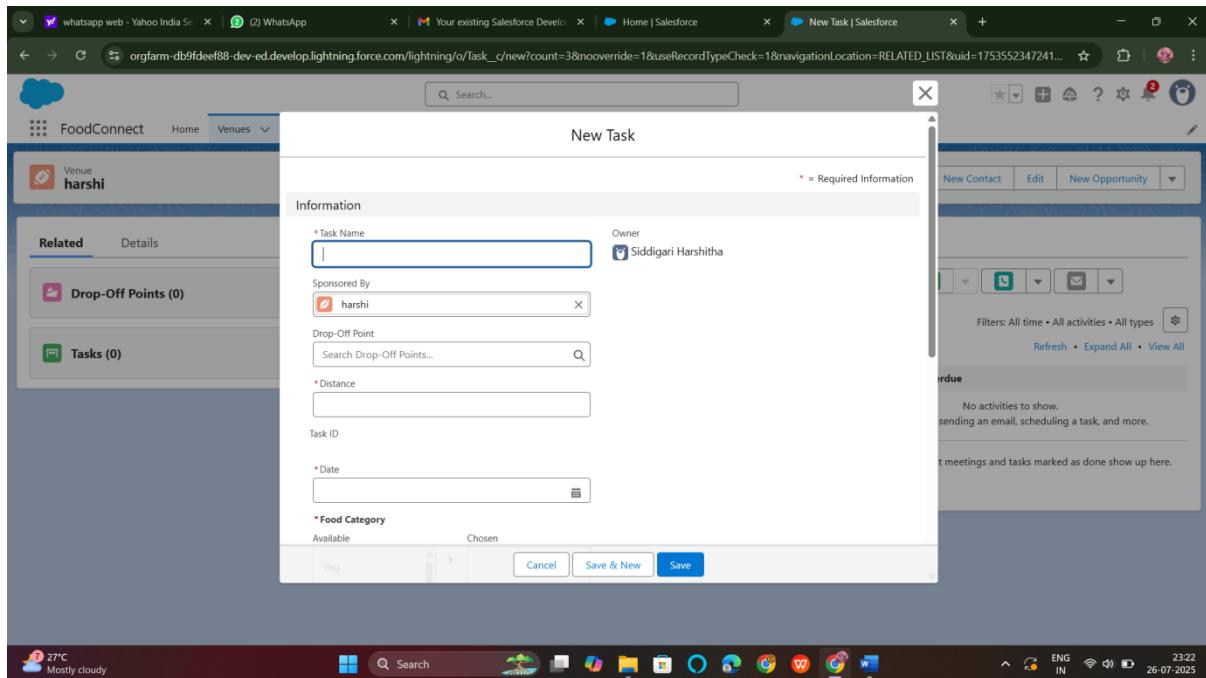
- Venue Name: harshi
- Contact Email: harshi@gmail.com
- Contact Phone: (905) 971-0500
- Location: 86, 14
- Venue Location: Nandyl
- Created By: Siddigari Harshitha, 7/26/2025, 10:51 AM

The owner of the venue is Siddigari Harshitha. The activity sidebar shows no upcoming or overdue activities.

This screenshot shows a Salesforce Lightning interface with a modal dialog titled "New Drop-Off Point". The dialog contains the following fields:

- Drop-Off Point Name: harshi
- Venue\_c: harshi
- Location 2: Latitude and Longitude fields (empty)
- State: --None--
- Distance: (empty input field)

The dialog includes standard buttons at the bottom: Cancel, Save & New, and Save.



## CONCLUSION :

The salesforce Food Connect App successfully enhances food distribution efficiency by leveraging Salesforce's capabilities. It improves coordination and transparency in food donation efforts, addressing food insecurity and maximizing resource utilization.

A brief summary of what the project achieved:

- **Outcome:** A functional Salesforce application that enhances food distribution efficiency.
- **Impact:** Improved coordination and transparency in food donation efforts.

## ADDITIONAL DETAILS :

In the additional details I would like to add my idea of including Artificial Intelligence(AI) into the app.

This AI would help us in many ways :

- Firstly it would help the unsophisticated users or naïve users to go through the app and get to know about it.
- It can also help the people who do not know how to become a volunteer and how to donate food through voice assistant.
- It can give faster and more accurate directions to the location volunteers need to reach.
- Lastly it can also protect the security and detect any fraud access into the app.