**Project Documentation for Salesforce Admin - Food Delivery for the Underprivileged**

**Project Title:** Salesforce Admin Implementation for Food Delivery Initiative

**Project Overview:**  
This project documentation outlines the implementation of a Salesforce solution designed to facilitate the delivery of food to underprivileged individuals. The focus is on the administrative aspects of Salesforce, detailing the creation of objects, fields, flows, and records necessary to manage the logistics of food distribution effectively.

**1. Introduction**

The goal of this Salesforce project is to leverage CRM capabilities to manage and automate the process of delivering food to those in need. This includes tracking beneficiaries, managing food inventory, assigning deliveries, and reporting—all configured through declarative tools by the Salesforce Admin.

**2. Project Objectives**

* Build a scalable data model to track food delivery operations.
* Enable automation for beneficiary registration and delivery scheduling.
* Provide clear reporting on impact metrics and inventory status.
* Support various user roles: Admins, Volunteers, and Coordinators.

**3. Custom Object Design**

**3.1 Beneficiary (Custom Object)**

* Purpose: Track individuals or households receiving food.
* Key Fields:
  + Name (Text)
  + Phone Number (Phone)
  + Address (Text Area)
  + Dietary Restrictions (Picklist: Vegetarian, Vegan, Gluten-Free, None)
  + Household Size (Number)

**3.2 Food Inventory (Custom Object)**

* Purpose: Store available food items and manage stock.
* Key Fields:
  + Item Name (Text)
  + Quantity Available (Number)
  + Expiry Date (Date)
  + Category (Picklist: Dry, Fresh, Canned, Frozen)

**3.3 Delivery (Custom Object)**

* Purpose: Track the delivery of food parcels.
* Key Fields:
  + Delivery Date (Date/Time)
  + Status (Picklist: Scheduled, In Progress, Completed, Failed)
  + Assigned Volunteer (Lookup to User)
  + Linked Beneficiary (Lookup to Beneficiary)
  + Food Items Delivered (Text or Related Object)

**3.4 Volunteer Assignment (Optional Object)**

* Tracks which users are assigned to deliveries.
* Related to both Users and Deliveries.

**4. Automation Using Flows**

**4.1 Flow: Beneficiary Onboarding**

* **Type:** Screen Flow
* **Trigger:** Manual or embedded in a Community Page.
* **Steps:**
  1. Collect beneficiary information.
  2. Validate fields (e.g., check for duplicates).
  3. Create Beneficiary record.
  4. Send confirmation email to Admin.

**4.2 Flow: Delivery Scheduling**

* **Type:** Record-Triggered Flow
* **Trigger:** When a Delivery is created.
* **Steps:**
  1. Fetch available food from inventory.
  2. Assign a volunteer (based on availability).
  3. Reduce item quantity in Food Inventory.
  4. Notify volunteer and beneficiary.

**4.3 Flow: Inventory Refill Reminder**

* **Type:** Scheduled Flow
* **Trigger:** Daily at 9 AM.
* **Logic:** If Quantity < Threshold (e.g., 10), send notification to Admin.

**5. Reports and Dashboards**

* **Monthly Beneficiaries Report**
  + Tracks number of new beneficiaries onboarded.
* **Delivery Status Dashboard**
  + Shows scheduled, completed, and failed deliveries.
* **Inventory Stock Report**
  + Monitors available food quantities by category.

**6. User Roles & Permission Sets**

* **Admin:** Full access to all objects and records.
* **Volunteer:** Read access to Beneficiaries, Edit access to Deliveries assigned to them.
* **Coordinator:** Access to reports, manage inventory, assign volunteers.

**7. Data Management**

* **Import Tools:** Use Data Loader or Data Import Wizard for bulk upload of beneficiaries or inventory.
* **Validation Rules:** Prevent duplicate beneficiaries or expired food items being delivered.
* **Record Types:** Optional use for categorizing beneficiaries (e.g., Individual, Family).

**8. Training & Documentation**

* **Modules to Cover:**
  + Navigating Salesforce for Nonprofits
  + Managing Records & Lists
  + Using Reports & Dashboards
  + Running and Testing Flows
* **Support Channels:** Email, Knowledge Base, Scheduled Training Sessions.

**9. Conclusion**

This Salesforce Admin configuration empowers teams to efficiently manage food distribution to the poor through a structured, automated, and trackable system. It simplifies operations, ensures transparency, and helps measure real-world impact.