

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 > OBJECT MANAGER

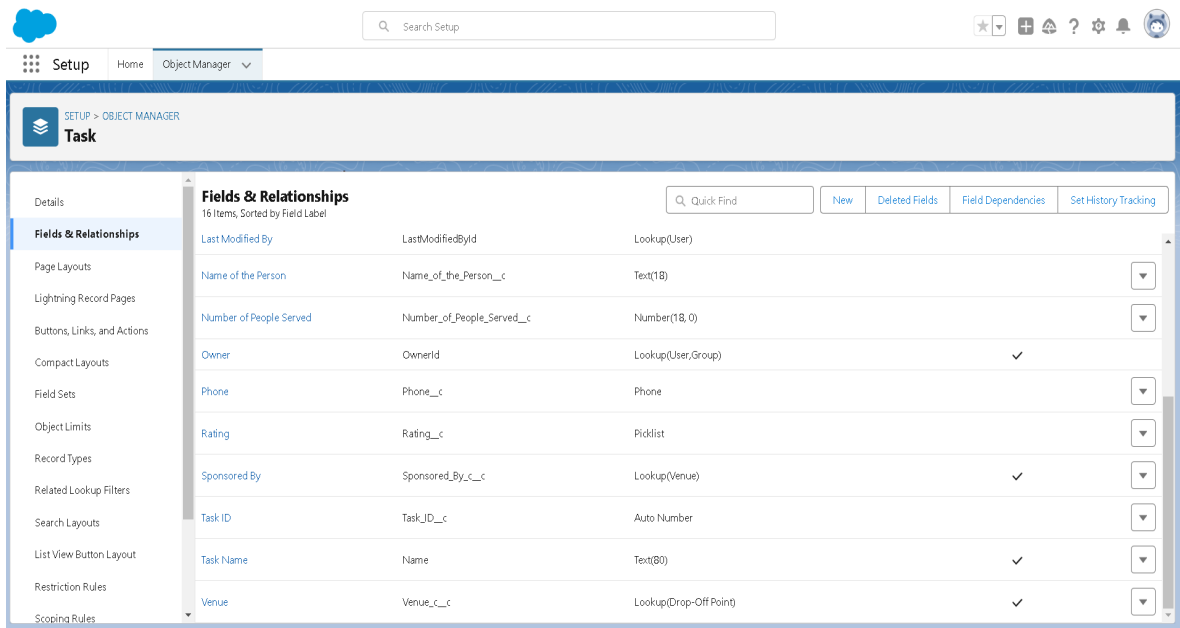
Drop-Off Point

9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Distance	Distance__c	Number(18, 0)		
Distance Calculation	Distance_Calculation__c	Number(18, 0)		
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.

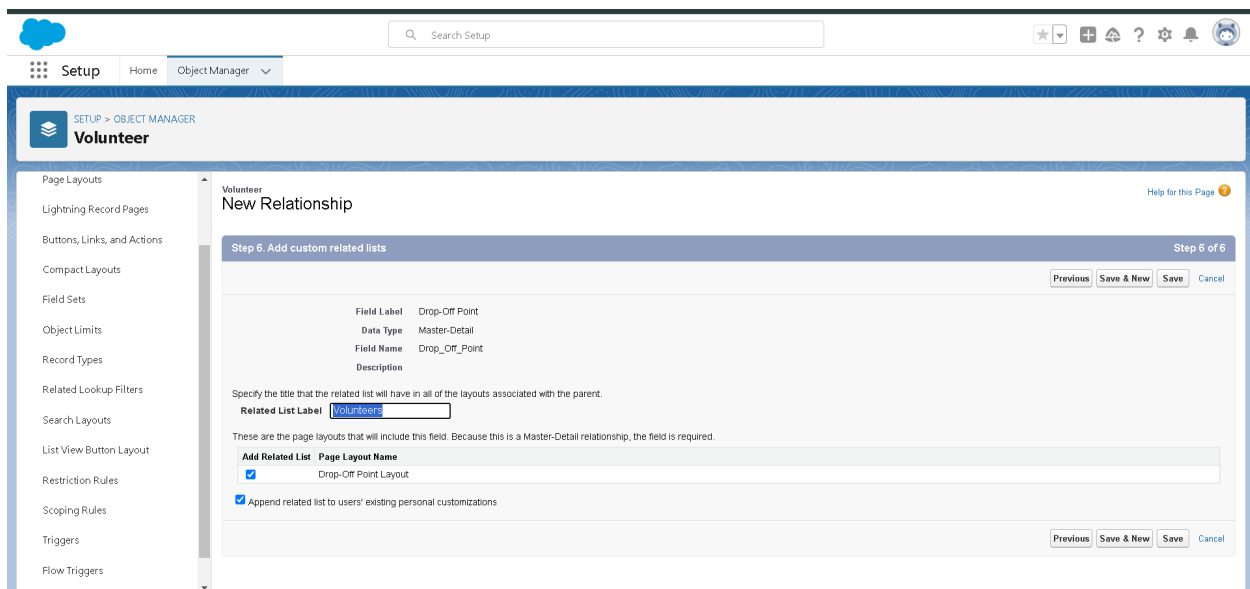


The screenshot shows the 'Task' object in the 'Fields & Relationships' section of the Salesforce Object Manager. The left sidebar lists various configuration options, with 'Fields & Relationships' selected. The main area displays a table of 16 fields, sorted by Field Label. The table includes columns for 'Last Modified By', 'LastModifiedById', and 'Lookup(User)'. The fields listed are: Name of the Person, Number of People Served, Owner, Phone, Rating, Sponsored By, Task ID, Task Name, and Venue. Each field has a corresponding data type and a dropdown menu for further configuration.

Field Label	LastModifiedById	Lookup(User)
Name of the Person	Name_of_the_Person__c	Text(18)
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
Sponsored By	Sponsored_By__c	Lookup(Venue) ✓
Task ID	Task_ID__c	Auto Number
Task Name	Name	Text(80) ✓
Venue	Venue__c	Lookup(Drop-Off Point) ✓

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.



The screenshot shows the 'Volunteer' object in the 'New Relationship' section of the Salesforce Object Manager. The left sidebar lists various configuration options, with 'New Relationship' selected. The main area displays a form for creating a new relationship. The form includes fields for 'Field Label', 'Data Type', 'Field Name', and 'Description'. The 'Related List Label' is set to 'Volunteers'. The 'Add Related List' checkbox is checked, and the 'Append related list to users' existing personal customizations' checkbox is also checked. The form is titled 'Step 6. Add custom related lists' and 'Step 6 of 6'.

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.

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the 'Execution Detail' object is selected. The left sidebar contains a list of setup options: Details, Fields & Relationships (selected), 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, and Restriction Rules. The main content area is titled 'Fields & Relationships' and shows a table of 6 items, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Created By (CreatedBy, Lookup(User)), Execution Detail Name (Name, Text(80)), Execution ID (Execution_ID__c, Auto Number), Last Modified By (LastModifiedById, Lookup(User)), Task (Task__c, Master-Detail(Task)), and Volunteer (Volunteer__c, Master-Detail(Volunteer)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Execution Detail Name	Name	Text(80)		✓
Execution ID	Execution_ID__c	Auto Number		
Last Modified By	LastModifiedById	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
- **Rule 3:**
 - **Label:** Rule 3
 - **Criteria:** Records where the distance is between 30 km and 50 km
 - **Access:** Shared with Public Group - Street Cause
 -

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Sharing Settings' and displays several sections for configuring sharing rules:

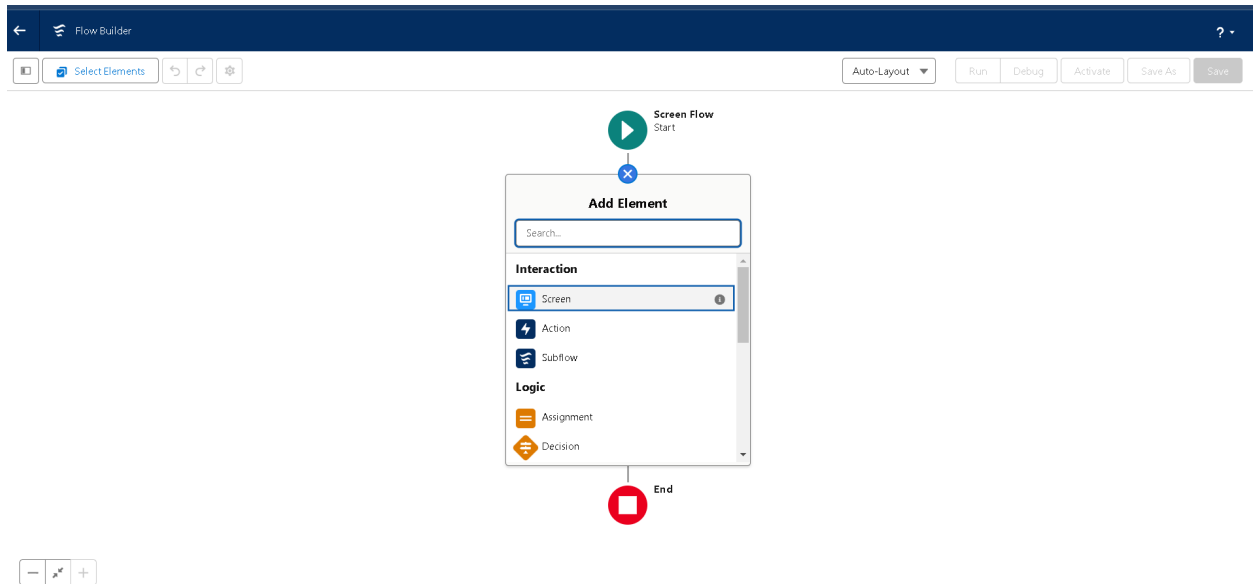
- Work Step Template Sharing Rules:** No sharing rules specified. Includes 'New' and 'Recalculate' buttons.
- Work Type Sharing Rules:** No sharing rules specified. Includes 'New' and 'Recalculate' buttons.
- Work Type Group Sharing Rules:** No sharing rules specified. Includes 'New' and 'Recalculate' buttons.
- Drop-Off Point Sharing Rules:** Includes a table with three rules.
- Research Proposal Sharing Rules:** No sharing rules specified. Includes 'New' and 'Recalculate' buttons.

Action	Criteria	Shared With	Access Level
Edit Del	(Drop-Off Point: Distance GREATER THAN 30) AND (Drop-Off Point: Distance LESS THAN 50)	Group_Dava	Read/Write
Edit Del	(Drop-Off Point: Distance GREATER THAN 15) AND (Drop-Off Point: Distance LESS THAN 30)	Group_Evara	Read/Write
Edit Del	Drop-Off Point: Distance LESS THAN 15	Group_Iksha	Read/Write


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.
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FoodConnect

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Dashboard

Organization Details


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As of 15-Aug-2024, 2:14 am Viewing as Neha Patil

venue and Drop Off point

Venue Name	Drop-Off Point Name	Distance
La Royal Banquet Hall	Mumbai	69m
La Royal Banquet Hall	Pune	51k
Paradise Garden Function Hall	Nashik	282k
Ujwala Grand	-	-

View Report (venue and Drop Off point)



Volunteer Task

View Report (Volunteer Task)

3. Configuration and Setup Instructions

3.1 Creating Custom Objects

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

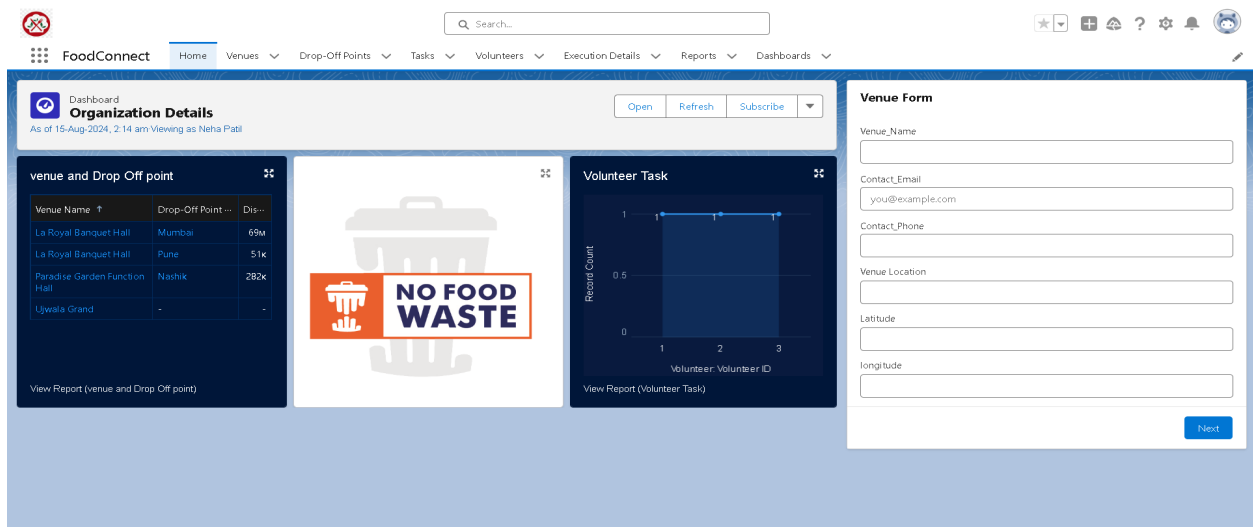
3.3 Lightning App Builder

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.

GitHub Repository Link:

<https://github.com/Nehapatil1402/Salesforce-Project-To-Supply-Leftover-Food-to-Poor-People>

