

PHASE 2: PROJECT PLANNING PHASE

2.1 Resource Planning

- The project planning phase begins with the identification and allocation of all essential resources required for the successful execution of the Salesforce NM Project titled “To Supply Leftover Food to Poor.”
- The primary platform chosen for this project is the Salesforce Developer Org, which provides a secure, cloud-based environment for building, testing, and deploying the application. This platform allows for seamless configuration, automation, and data management, which are essential for the effective functioning of the system.
- The main tools utilized in this project include Apex Triggers, Lightning App Builder, and Flow Builder. Apex Triggers help automate record creation and data manipulation processes, ensuring that the system performs tasks efficiently without manual intervention. The Lightning App Builder is used to design user-friendly interfaces, while Flow Builder enables the automation of repetitive operations through visual workflows.
- The human resources required for the project include the Salesforce Developer, NGO Users, and Volunteers. The Salesforce Developer is primarily responsible for system design and technical implementation. NGO Users are tasked with managing the operational aspects such as data entry, food collection records, and report generation. Volunteers contribute to the physical execution of food collection and distribution.
- The project is expected to be completed within approximately four weeks, allowing sufficient time for development, testing, and documentation.

2.2 Task Breakdown

- The project is organized into a four-week timeline to ensure systematic progress and timely delivery. During the first week, the Salesforce Developer Org will be set up, and essential custom objects such as Venue, Volunteer, Drop-Off Point, and Task will be created. This forms the foundation for all subsequent development work.

- In the second week, relationships between objects will be defined, and tabs and Flows will be developed to establish data automation. This stage ensures that data is properly linked and that the system can automatically perform necessary operations, reducing the scope for human error.
- The third week will focus on designing reports, dashboards, and sharing rules. Reports and dashboards will provide a visual representation of system performance, while sharing rules will manage access control among different users such as NGOs and volunteers.
- In the fourth and final week, comprehensive testing will be conducted to ensure that all components are functioning as intended. Documentation will also be prepared during this phase, and the final project will be deployed and uploaded to GitHub for reference and future use.
- This structured timeline ensures that each deliverable is completed on schedule and that all project objectives are met effectively.

2.3 Roles and Responsibilities

- The success of this project depends on the coordinated efforts of several roles, each with specific duties and responsibilities.
- The System Administrator is responsible for configuring the Salesforce environment, managing user roles and permissions, and ensuring the overall security of the system. They oversee user access controls and verify that each user group has the correct level of access to perform their assigned tasks.
- The Salesforce Developer is the technical backbone of the project. They are responsible for creating custom objects, defining data relationships, implementing Apex Triggers, and developing automation flows. The developer ensures that the system operates smoothly and that all functional requirements are met.
- NGO Users are the operational users of the system. They input and manage donor and food collection information, track food distribution, and generate reports. They serve as the main link between food donors and beneficiaries, using the system to record and analyze data.
- Volunteers are responsible for executing field operations, such as collecting leftover food from donors and delivering it to designated drop-off points or beneficiaries. They update the system with task statuses, feedback, and other

relevant data, ensuring transparency and accountability throughout the process.

- The combination of these roles creates a well-balanced team that integrates both technical and social components of the project.

2.4 Risk Management

- Risk management is an integral part of the project planning process. It ensures that potential obstacles are identified early and addressed effectively to minimize their impact on the project's success.
- One of the primary risks in this project is data duplication, which can lead to confusion and errors in record management. This can be prevented through the use of validation rules and unique constraints that restrict the entry of redundant data.
- Another risk is record linking errors, which may occur if lookup or master-detail relationships are not correctly defined. To avoid this, thorough testing will be carried out to verify that all relationships between objects are properly established and functioning as expected.
- Access control misconfiguration is another medium-level risk, as improper role or profile settings could result in unauthorized access or restricted visibility. To mitigate this, user roles and sharing rules will be carefully reviewed and configured according to organizational needs.
- Finally, report data inaccuracy may occur if filters or criteria are incorrectly set up. Regular validation of reports and dashboards will be conducted to ensure that the displayed data remains accurate and reliable.
- By identifying these potential issues early in the planning phase and establishing appropriate mitigation strategies, the project ensures a higher level of reliability and stability during implementation.

