Food Connect

FOODCONNECT: TO

SUPPLY LEFTOVER FOOD TO POOR

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ABSTRACT:

The Salesforce-based project aims to create a sustainable solution for redistributing surplus food to those in need, addressing both food waste and hunger. This initiative connects food donors—such as restaurants, hotels, and event organizers—with NGOs, shelters, and community kitchens that serve the underprivileged. Using Salesforce's robust CRM and automation tools, the platform allows donors to easily register leftover food, which is then efficiently matched with nearby recipients based on real-time demand and logistical factors.

Key features of the project include automated notifications to both donors and recipients, intelligent scheduling to ensure food is picked up and delivered promptly, and tracking to monitor the food's journey from donor to beneficiary. The system also integrates with mapping and route optimization tools to minimize transportation time and reduce carbon footprints.

To support continuous improvement, the platform provides detailed analytics on food donations, recipient needs, and operational efficiency. These insights help refine the distribution network, identify areas with the highest demand, and foster stronger relationships with food donors. Additionally, the platform includes community engagement features, such as recognition programs for donors and impact reports that highlight the benefits of their contributions.

By integrating these capabilities, the Salesforce project not only addresses immediate food insecurity but also builds a replicable model for communities worldwide to tackle hunger and food waste in a more organized and impactful manner.

INDEX:

INTRODUCTION:

Food waste is a significant global issue, with millions of tons of edible food discarded every year, while millions of people face hunger and food insecurity. This disparity highlights the need for innovative solutions that can bridge the gap between food surplus and hunger. The Salesforce project, designed to supply leftover food to the poor, addresses this challenge by creating an organized, efficient, and scalable platform for food redistribution.

The project leverages Salesforce's comprehensive CRM and automation capabilities to connect food donors—such as restaurants, hotels, and event venues—with organizations that serve the underprivileged, including NGOs, shelters, and community kitchens. The platform simplifies the process of donating surplus food, ensuring that it reaches those in need promptly and safely. By automating notifications, optimizing logistics, and providing real-time tracking, the system minimizes food spoilage and ensures that surplus food is distributed where it can have the most impact.

This introduction sets the stage for a solution that not only reduces food waste but also contributes to social welfare by feeding the hungry. The Salesforce-based platform aims to create a sustainable, replicable model that can be adapted by communities worldwide, ultimately fostering a more equitable distribution of resources and addressing the critical issue of food insecurity.

OBJECT:

Salesforce objects are key components used to store and manage data within the Salesforce platform. There are two main types:

1. **Standard Objects:** Pre-built objects provided by Salesforce, such as:
    1. **Account:** Stores information about organizations like food donors or recipient NGOs.
    2. **Contact:** Holds details about individuals associated with these organizations.
    3. **Opportunity:** Tracks potential food donations through various stages.
    4. **Case:** Manages issues that arise during the food distribution process.
2. **Custom Objects:** User-defined objects tailored to specific needs, such as:

- **Venue:** Stores information about locations where surplus food is available, such as restaurants, hotels, or event sites.

- **Dropoff Point:** Captures details of locations where food will be delivered, such as shelters, NGOs, or community kitchens.

- **Task:** Manages specific actions or steps needed in the food redistribution process, like scheduling pickups, coordinating with volunteers, or confirming deliveries.

- **Volunteer:** Tracks details about individuals who are helping with the food distribution, including their availability, assigned tasks, and contact information.

- **Execution Details:** Holds information on the actual implementation of food distribution activities, including logistics, timing, and any issues encountered during the process.

1. Create Customer DetailsObject

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Enter the label name >> Customer

Details Plural label name >>

Customer Details

Enter Record Name Label and

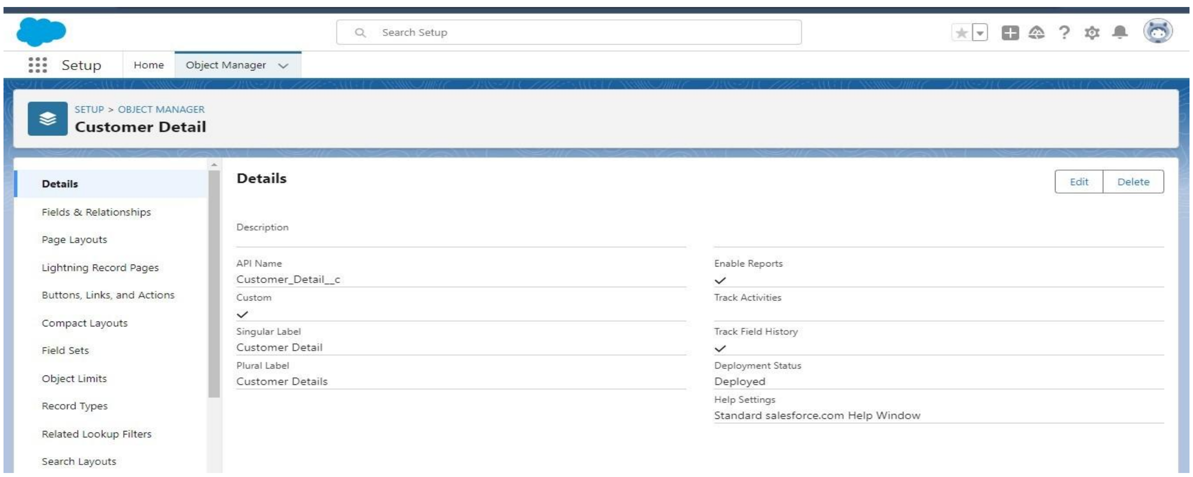
Format Record Name >>

Customer Name Data Type >>

Text

Click on Allow reports and Track Field

History, Allow search >> Save



1. Create Venue Object

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >>Click on Custom Object.

Enter the label name

>> Venue Plural label

name >> Venues

Enter Record Name Label and Format

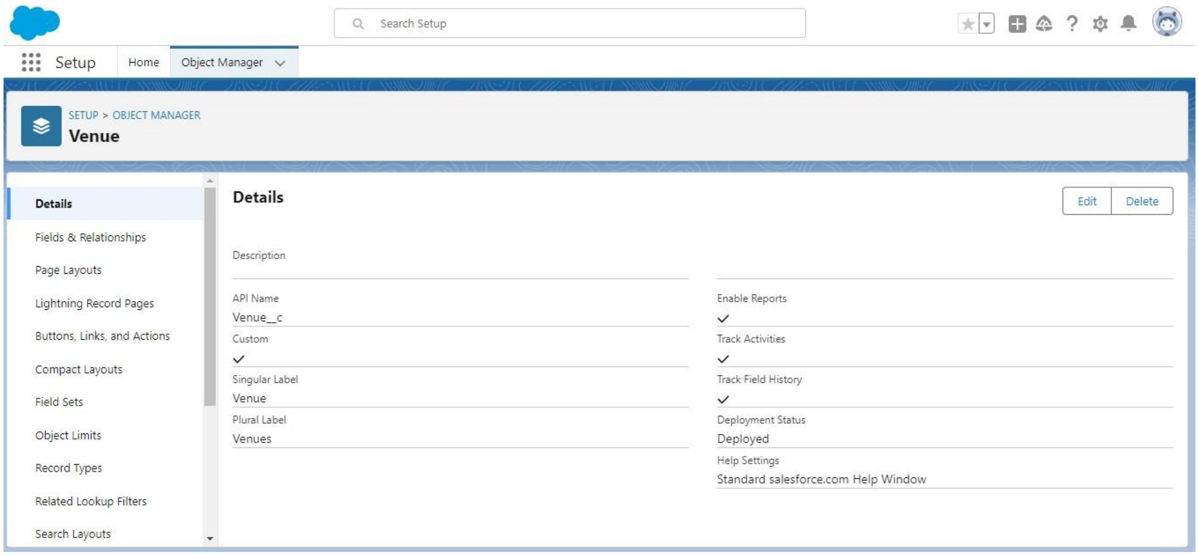
Record Name >>

Venue Name Data

Type >> Text

Click on Allow reports and Track Field History,Allow Activities.

Allow search >> Save.



2. Create Drop-Off Point Object

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Enter the label name >> Drop-

Off Point Plural label name>>

Drop-Off Points Enter Record

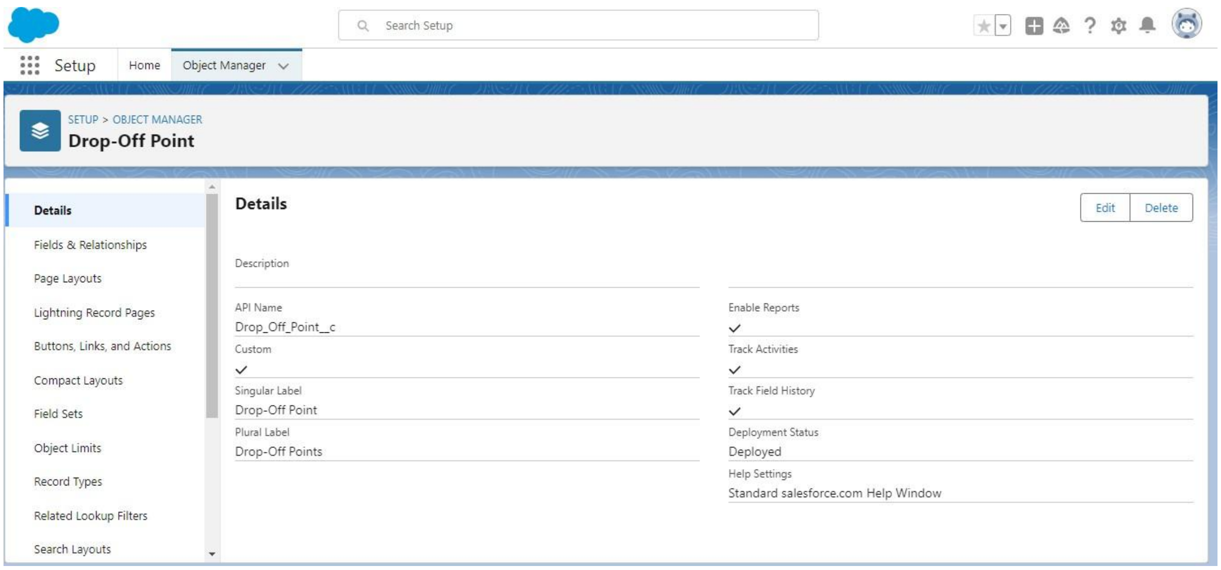
Name Label and Format Record

Name >> Drop-Off point Name

Data Type >> Text

Click on Allow reports and Track Field History,Allow

Activities Allow search >> Save.



3. Create Task Object

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Enter the label

name>> Task Plural

label name>> Tasks

Enter Record Name Label and Format

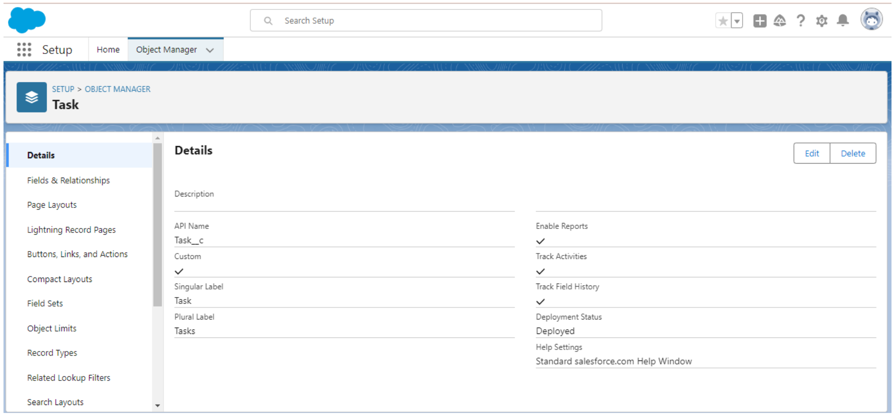
Record Name >>

Task Name Data

Type >> Text

Click on Allow reports and Track Field History,Allow Activities

Allow search >> Save.



4. Create Volunteer Object

To create an object:

From the setup page >> Click on Object Manager>> Click on Create >> Click on Custom Object. Enter the label name>> Volunteer Plural label name>> Volunteers Enter Record Name Label and

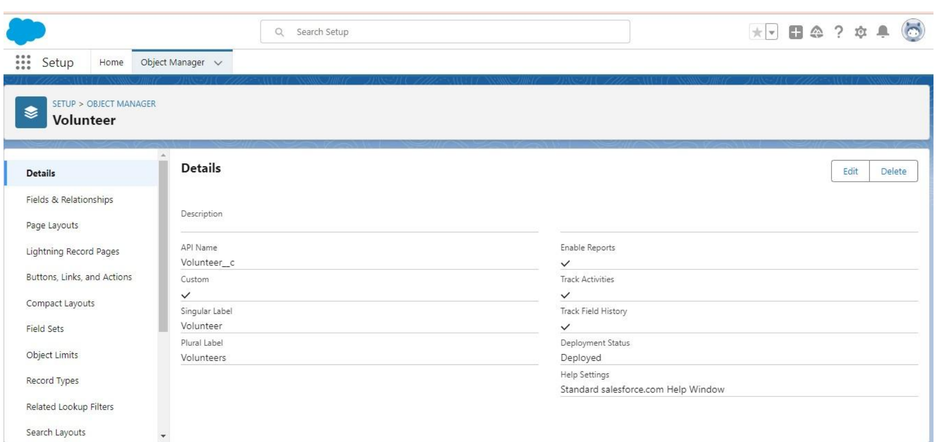
Format Record Name >>

Volunteer Name Data Type >>

Text

Click on Allow reports and Track Field History, Allow

Activities Allow search >> Save.



5. Create Execution Details Object

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Enter the label name >> Execution

Detail Plural label name >>

Execution Details Enter Record

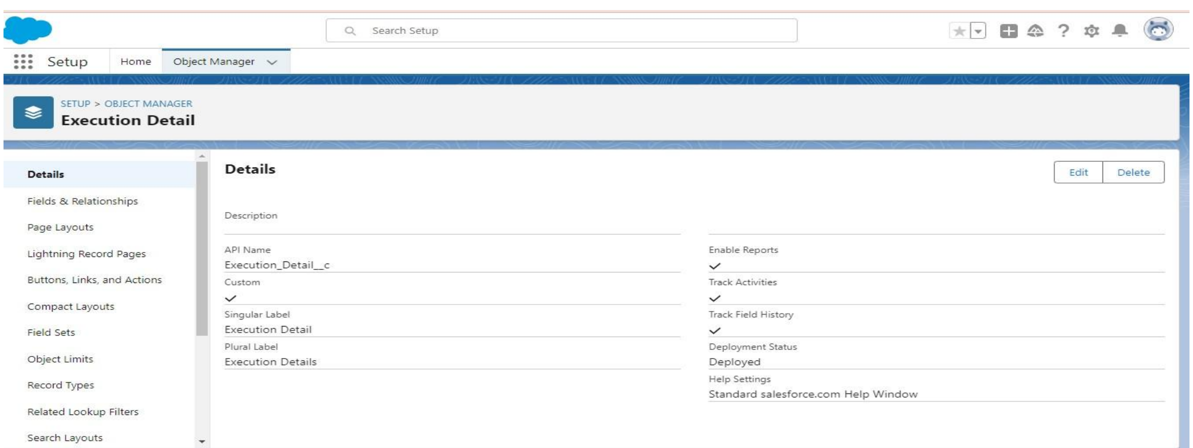
Name Label and Format Record

Name >> Execution Detail Name

Data Type >> Text

Click on Allow reports and Track Field History, Allow

Activities Allow search >> Save.



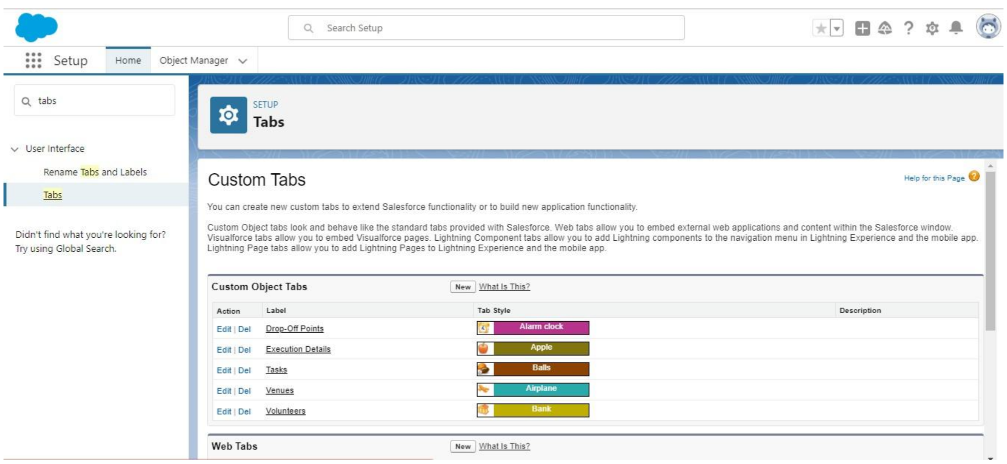
TABS

A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Creating a Custom Tab

To create a Tab:(Venue)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Venue) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save



Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “Drop-Off Point, Task, Volunteer, Execution Details”.
2. Follow the same steps as mentioned above

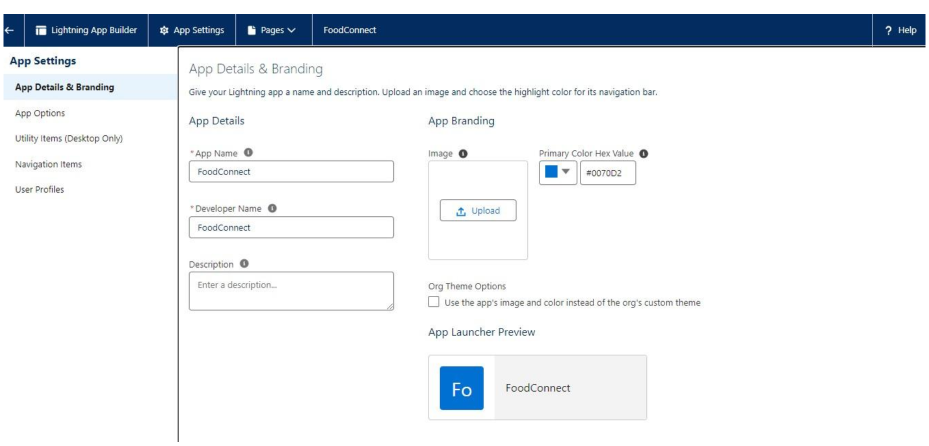
THE LIGHTNING APP

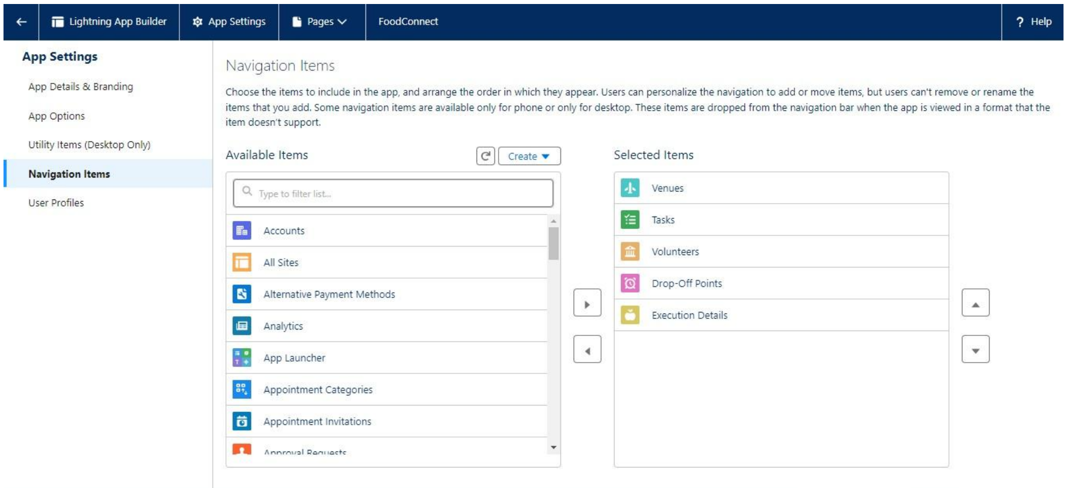
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

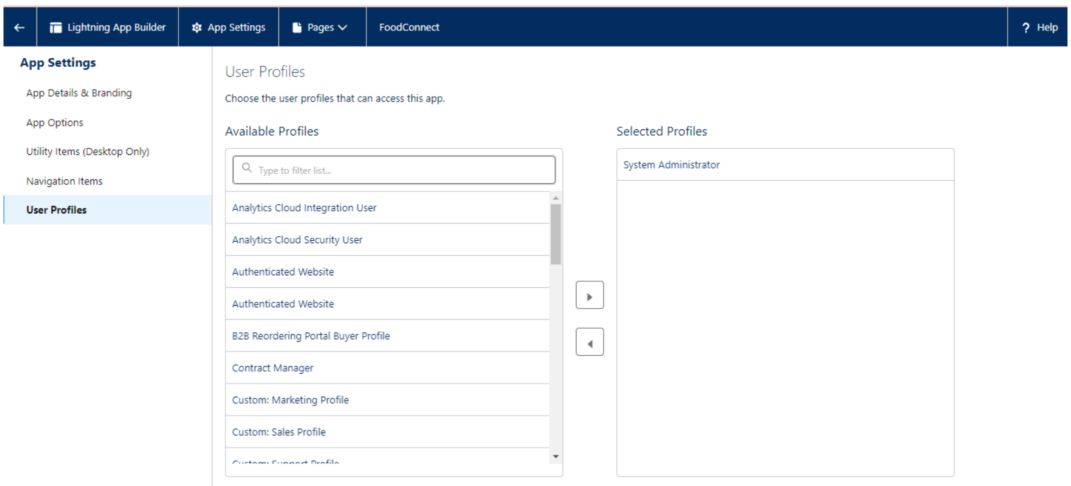
Create a Lightning App

To create a lightning app page:

1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.
   1. Fill the app name in app details and branding as follow App Name : FoodConnect
      Developer Name : This will auto populated
      Image : optional (if you want to give any image you can otherwise not mandatory) Primary color hex value : keep this default.
   2. Then click Next >> (App option page)Set Navigation Style as Standard Navigation >> Next.
   3. (Utility Items) keep it as default >> Next.
   4. To Add Navigation Items:
      Search for the item in the (Home, Venue, Drop-Off Point, Task, Volunteer, Execution Details, Reports) from the search bar and move it using the arrow button >> Next >> Next.
   5. To Add User Profiles:
      Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.



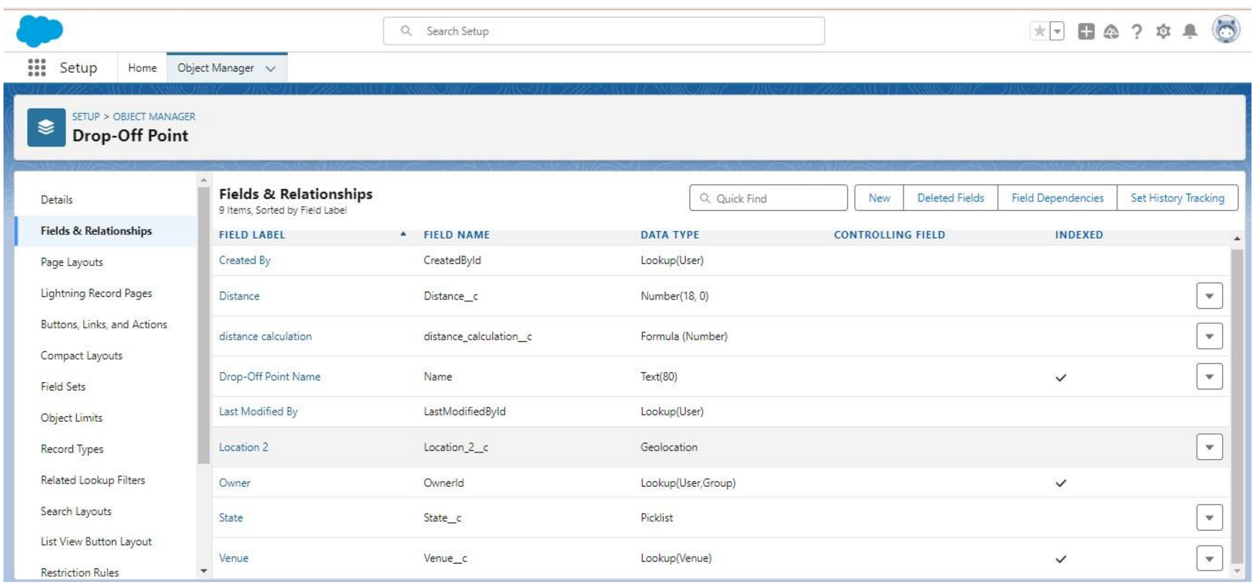

Lightning App Builder
App Settings
Pages
FoodConnect
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
Available Items
Create
Type to filter list...
Accounts
All Sites
Alternative Payment Methods
Analytics
App Launcher
Appointment Categories
Appointment Invitations
Selected Items
Venues
Tasks
Volunteers
Drop-Off Points
Execution Details

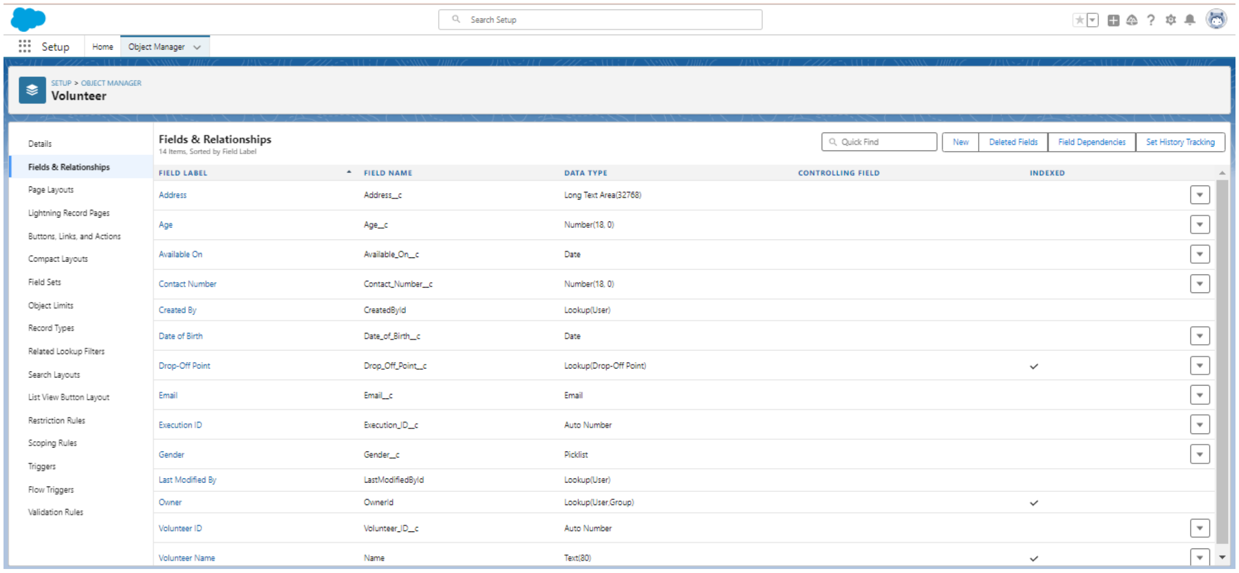

Lightning App Builder
App Settings
Pages
FoodConnect
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
User Profiles
Choose the user profiles that can access this app.
Available Profiles
Type to filter list...
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Authenticated Website
B2B Reordering Portal Buyer Profile
Contract Manager
Custom: Marketing Profile
Custom: Sales Profile
Selected Profiles
System Administrator

FIELDS

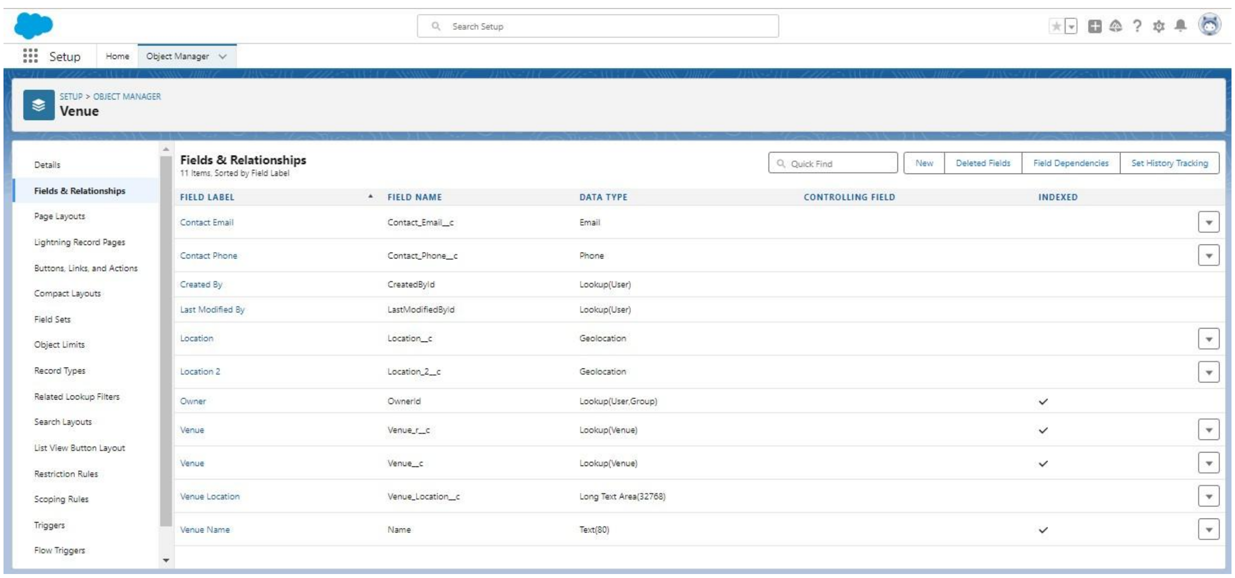
Creation of Lookup Relationship Field on Volunteer Object :

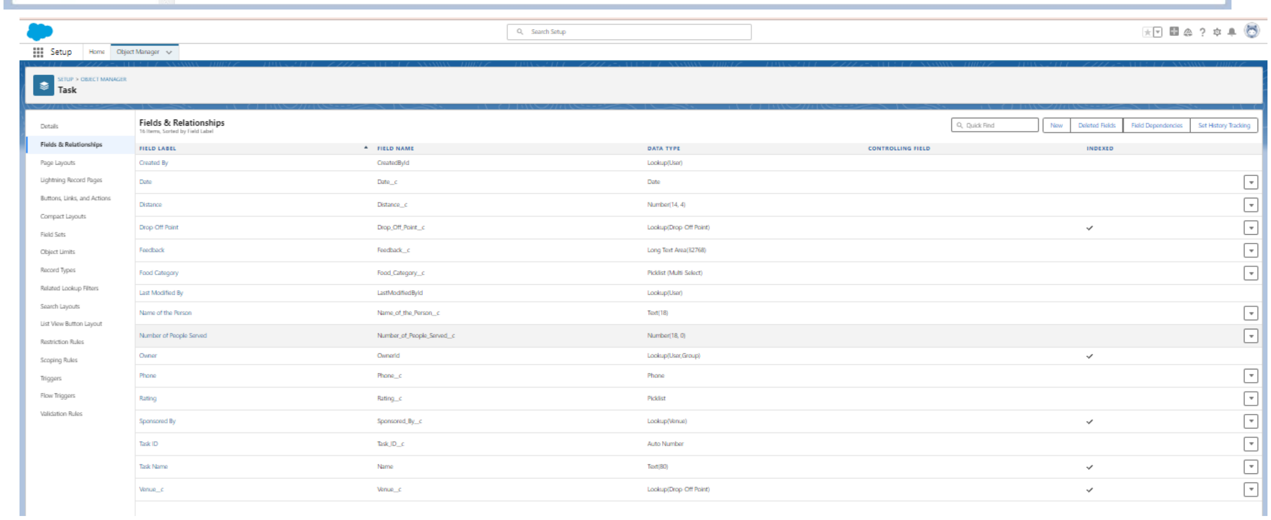
1. Go to setup >> click on Object Manager >> type object name(Volunteer) in the search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Master Detail relationship
4. Select the related object "Drop-Off point" and click next.
5. Field Name : Drop_Off_point
6. Field label : Auto generated
7. Next>>Next>>Save.
8.

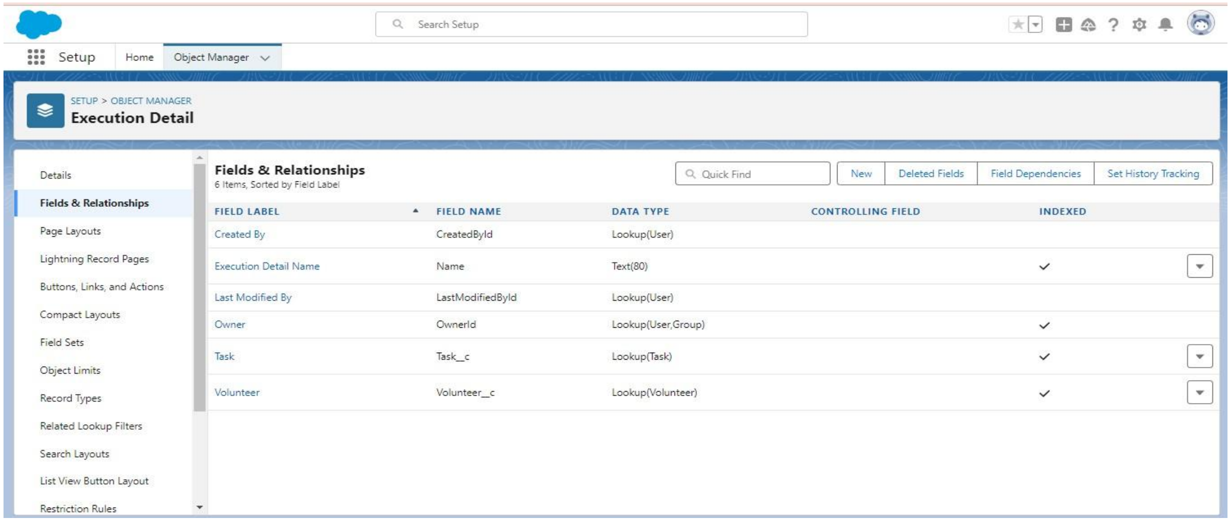




Next >> Next >> Save.






Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Execution Detail
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
Fields & Relationships
6 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)
Execution Detail Name
Name
Text(80)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Task
Task__c
Lookup(Task)
Volunteer
Volunteer__c
Lookup(Volunteer)

FLOWS

Create Flow to create a record in Venue object

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.
2. Select the Screen flow. Click on create.
3. Click on the ‘+’ icon in between start and end, and click on screen element.
4. Under the Screen

   Properties: Label :

   Venue Details

   API Name : Venue_Details

5. Now lets add components in this flow. Click on Text Component and name it

   as: Label : Venue Name

   API Name : Venue_Name

6. Click on Email Component and

   name it as: Label : Email

   API Name : Contact_Email

7. Click on Phone Component and

   name it as: Label : Phone

   API Name : Contact_Phone

8. Click on Text Component and

   name it as: Label : Venue Location

   API Name : Venue_Location

9. Click on Number Component and name

   it as: Label : Latitude

   API Name : Latitude

10. Click on Number Component and name

it as: Label : longitude

API Name : longitude

11. Next click on Done. This would like below
12. Click on the '+' icon in between Venue details and end, and click on create record element.
13. Now label it as

Label : Create Venue Record

API Name :

Create_Venue_Record How

Many Records to Create :

One

How to Set the Record Fields : Use separate resources, and literal

values Object : Venue

Set Field Values for the Venue : Click on 'Add Field' 5

times Field : Value = Contact_Email_c :

{!Contact_Email.value} Field : Value = Contact_Phone_

c : {!Contact_Phone.value} Field : Value = Name :

{!Venue_Name}

Field : Value = Venue_Location_c :

{!location} Field : Value = Location_Latitude_

s : {!latitude}

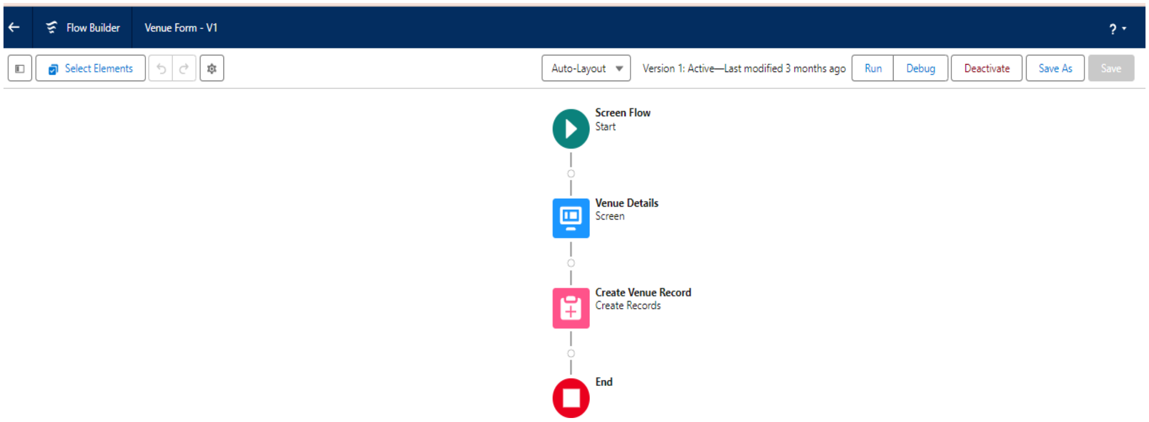
Field : Value = Location_Longitude__s : {!longitude}

14. This would look like:
15. Click on Save as:

Flow Label : Venue

Form Flow API Name

: Venue_Form



TRIGGERS

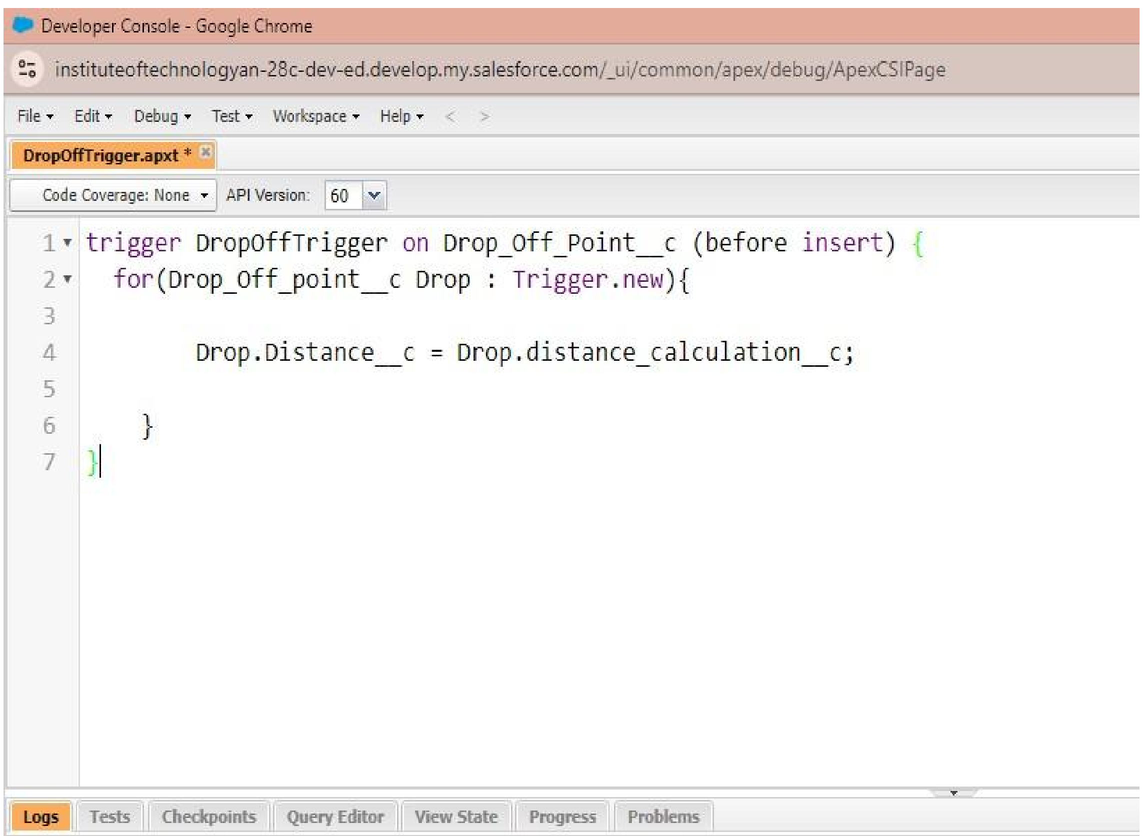
Create a Trigger

1. Log into the trailhead account, navigate to the gear icon in the top right corner.
2. Click on developer console and you will be navigated to a new console window.
3. Click on the File menu in the toolbar, and click on new >> Trigger.
4. Enter the trigger name and the object to be triggered.
5. Enter Name :

   DropOffTrigger

   sObject: Drop-Off

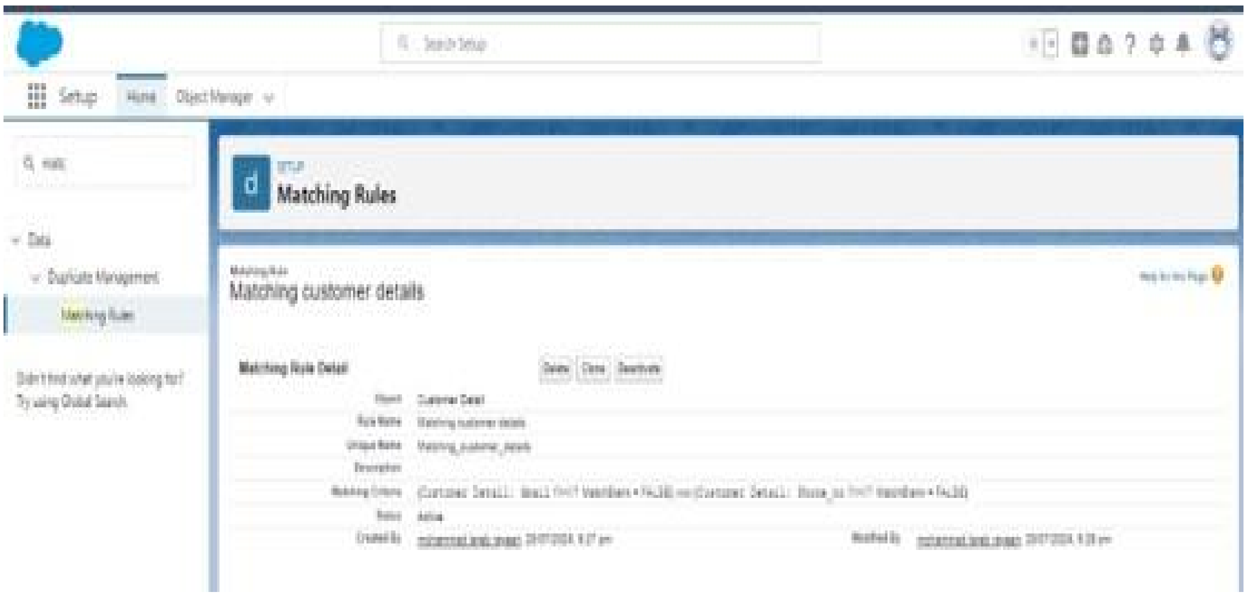
   Point
6. Click on Submit.



To create a matching rule to an Customer details Object

1. Go to quick find box in setup and search for matching Rule.
2. Click on matching rule >> click on New Rule.
3. Select the object as Customer details and click Next.
4. Give the Rule name : Matching customer details
5. Unique name : is auto populated

6. Define the matching criteria as
7. Field   Matching Method
    1. Gmail   Exact
    2. Phone Number Exact
8. Click save.
9. After saving click on activate



PROFILES

1. Go to setup page >> type Profiles in Quick Find bar >> click on Profiles >> click on ‘S’
2. Click on Clone beside Standard Platform User.
3. Under Clone

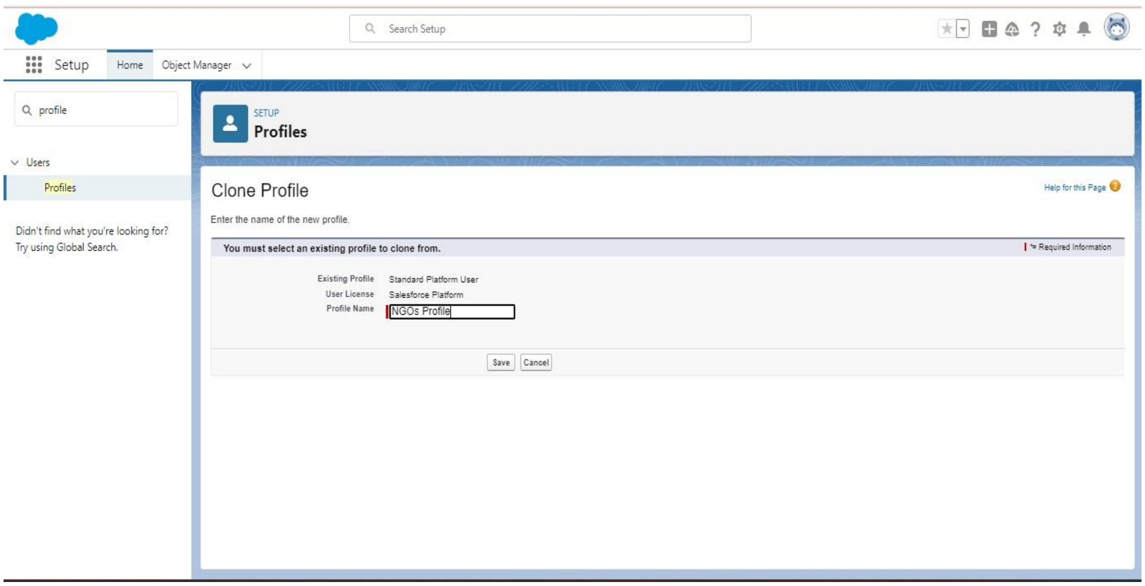
   Profile:

   Profile Name

   : NGOs

   Profile

1. Then click on Save



CREATION OF USERS

In our Project we consider them as NGO's

Creation of User1

1. Go to setup page >> type users in Quick Find bar >> click on users>> New user.
2. In General Information give details as: (Note : create users as per your wish

   NGO's) First Name : Iksha Foundation

Last Name :

Iksha_Foundation

Alias : iiksh

Email : Give Your Email

Username : ikshafoundation@sb.com(give the username

different) Nickname : Auto Populated

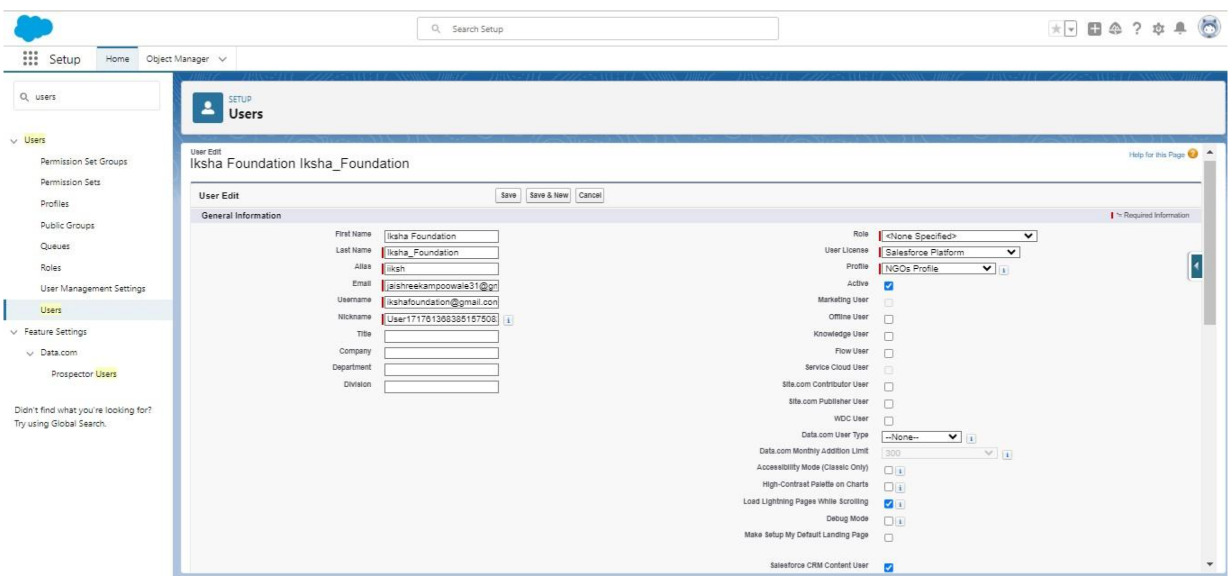
User License : Salesforce

Platform Profile : NGOs

Profile

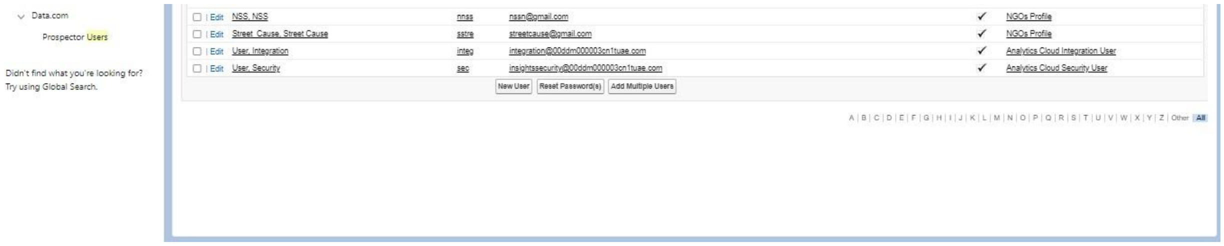
Active : Check

1. Click on Save



Creation of User2, User3

1. Create another Two Users by following steps in Activity - 1 with similar User License and Profile.
2. Give Different First Name, Last Name based on Different NGO’s.



PUBLIC GROUPS

Creation of Public Group 1

1. Go to setup page >> type Public Groups in Quick Find bar >> click on Public Groups >> click on New.
2. Under Group

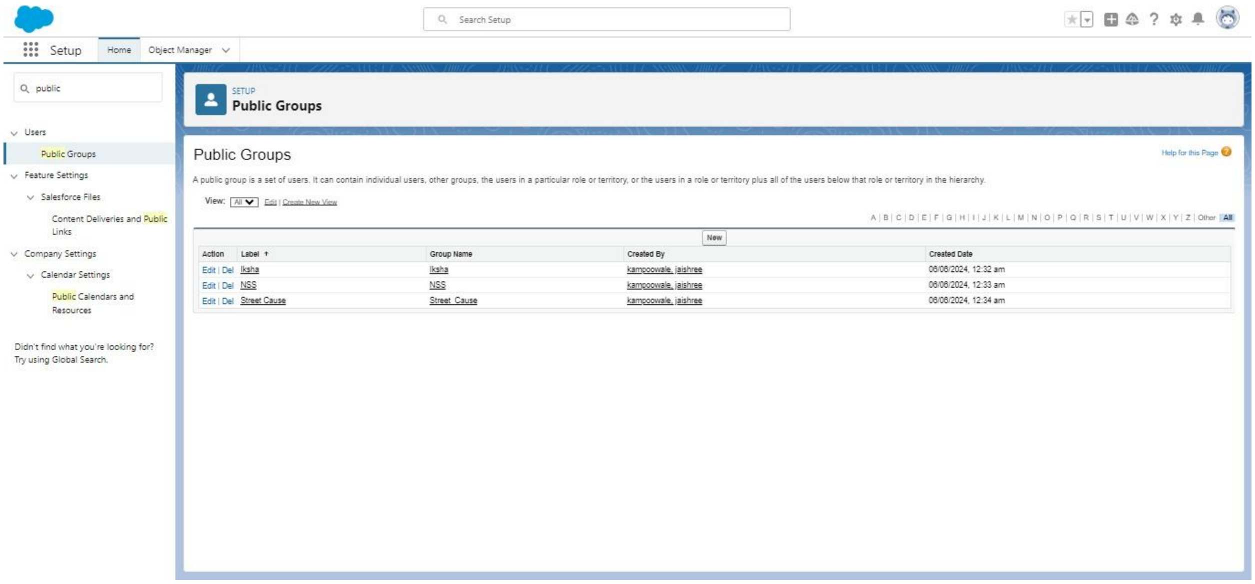
   Information: Label

   : Iksha

Group Name : Iksha

Grant Access Using Hierarchies : Check

1. In Search, Select Users.
2. In Selected Members Add Iksha Foundation and System Administrator



Creation of Public Group 2

1. By Following Steps in Activity 1, Create other two Public Groups for other two users.
2. After Saving this would look like this.

REPORT TYPES

Creation of Report Types

1. Go to setup page >> type Report Types in Quick Find bar >> click on Report Types >> click on Continue >> Click on New Custom Report Type.
2. In Define the Custom

   Report Type: Primary

   Object : Select Venues

Report Type Label : Venue with DropOff with Volunteer

Report Type Name :

Venue_with_DropOff_with_Volunteer Description

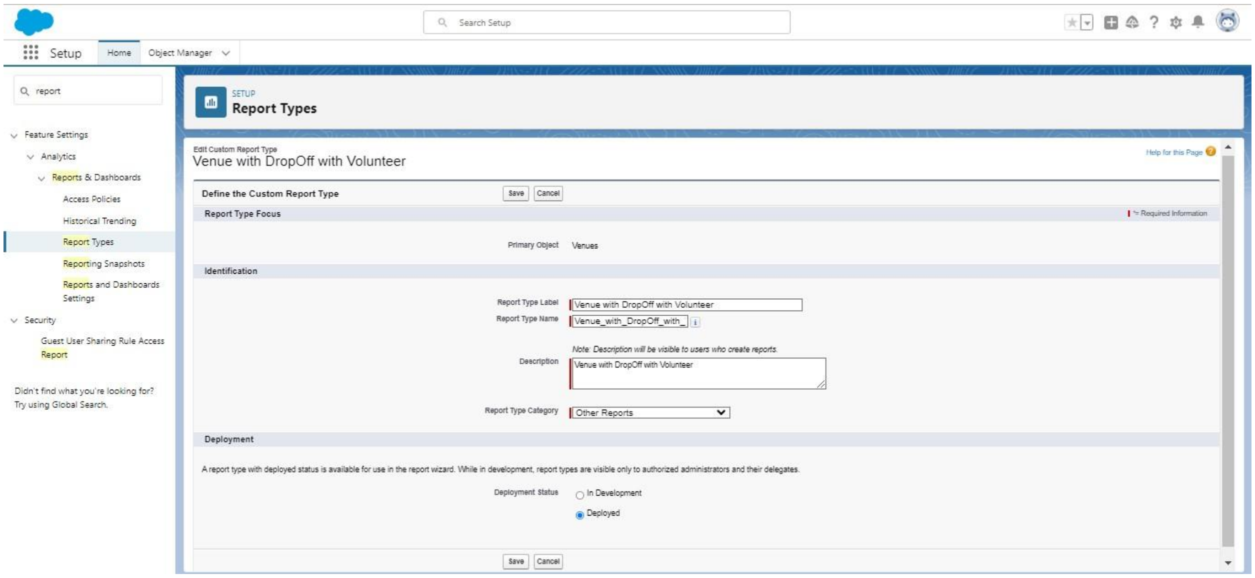
: Venue with DropOff with Volunteer

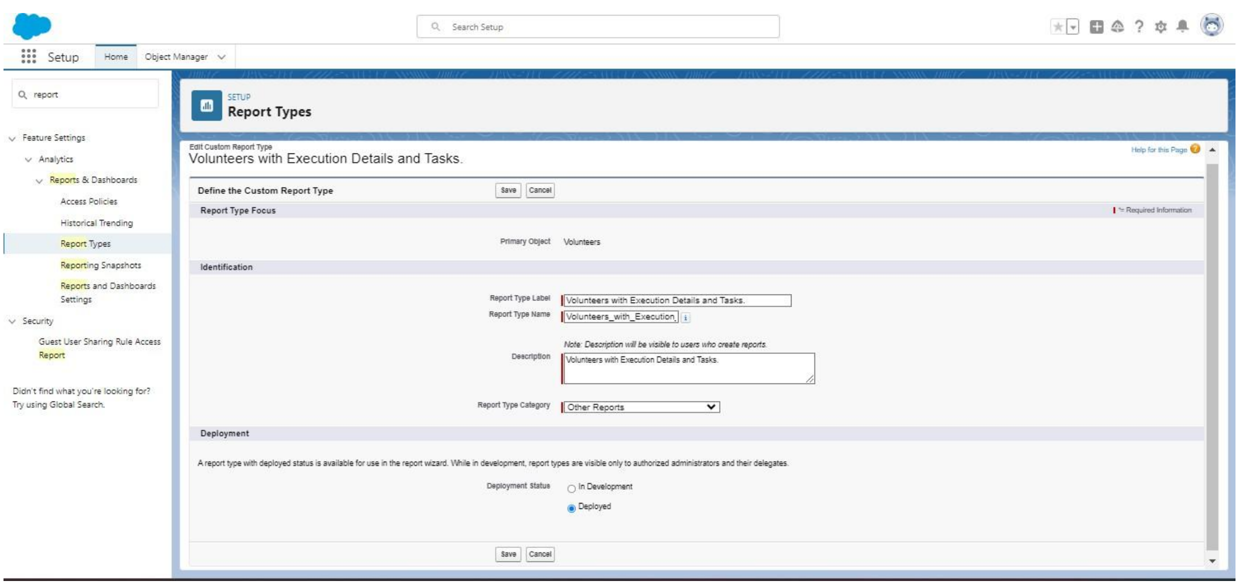
Store in Category : Select Other

Reports Deployment Status :

Deployed

1. Click on Next
2. Near Click to relate another Object Select Drop-Off Points.
3. And also select "A" records may or may not have related "B" records.
4. Now again Near Click to relate another Object Select Volunteers.
5. Now click on Save


Search Setup
Setup
Home
Object Manager
report
Feature Settings
Analytics
Reports & Dashboards
Access Policies
Historical Trending
Report Types
Reporting Snapshots
Reports and Dashboards Settings
Security
Guest User Sharing Rule Access Report
Didn't find what you're looking for? Try using Global Search.
SETUP
Report Types
Edit Custom Report Type
Venue with DropOff with Volunteer
Help for this Page
Define the Custom Report Type
Save
Cancel
Report Type Focus
= Required Information
Primary Object
Venues
Identification
Report Type Label
Venue with DropOff with Volunteer
Report Type Name
Venue_with_DropOff_with_
Note: Description will be visible to users who create reports.
Description
Venue with DropOff with Volunteer
Report Type Category
Other Reports
Deployment
A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.
Deployment Status
In Development
Deployed
Save
Cancel


Search Setup
Setup
Home
Object Manager
report
Feature Settings
Analytics
Reports & Dashboards
Access Policies
Historical Trending
Report Types
Reporting Snapshots
Reports and Dashboards Settings
Security
Guest User Sharing Rule Access Report
Didn't find what you're looking for? Try using Global Search.
SETUP
Report Types
Edit Custom Report Type
Volunteers with Execution Details and Tasks.
Help for this Page
Define the Custom Report Type
Save
Cancel
Report Type Focus
= Required Information
Primary Object
Volunteers
Identification
Report Type Label
Volunteers with Execution Details and Tasks.
Report Type Name
Volunteers_with_Execution
Note: Description will be visible to users who create reports.
Description
Volunteers with Execution Details and Tasks.
Report Type Category
Other Reports
Deployment
A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.
Deployment Status
In Development
Deployed
Save
Cancel

REPORTS

Creation of Report on Venue with DropOff with Volunteer

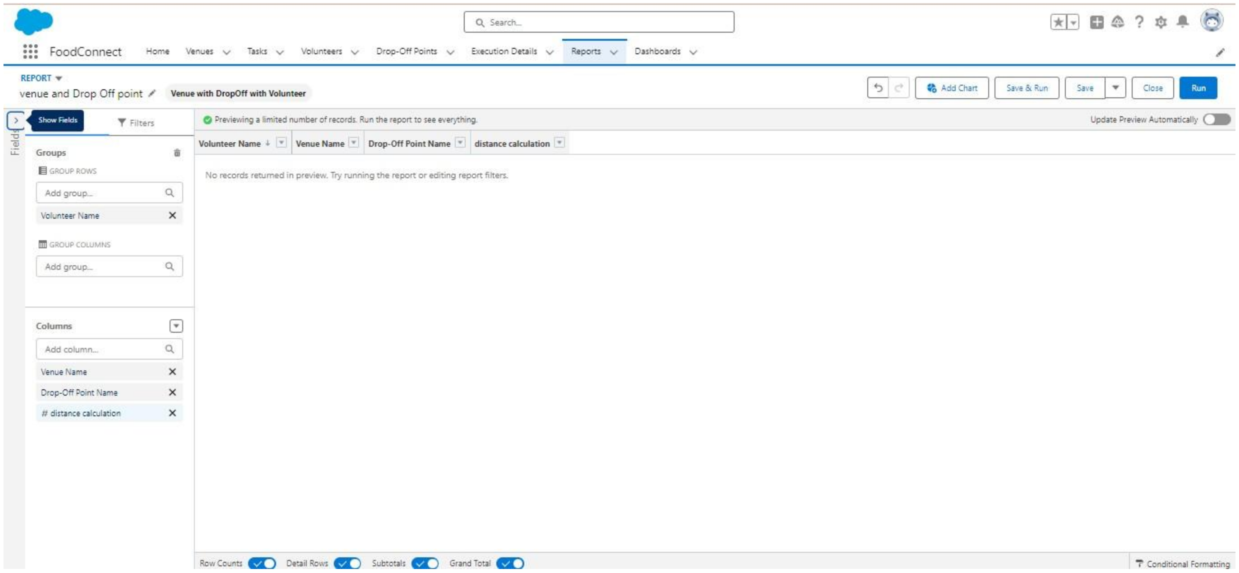
1. Go to the app(FoodConnect) >> click on the reports tab
2. Click on New Folder.

    Folder Label : Custom Reports

    Folder Unique Name : CustomReports

1. Open Custom Reports and click on New Report
2. Select Report Type : Venue with DropOff with Volunteer
3. Then click on Start Report.
4. In GROUP ROWS : Add Volunteer Name
5. In Columns : Add Venue Name, Drop-Off point Name, Distance.

1. Now click on Save & Run.
2. Give Label as :
3. Report Name : venue and Drop Off point
4. Report Unique Name : Auto Populated
5. Click on Select Folder and select Custom Report, then click on Save.



Creation of Report on Volunteers with Execution Details and Tasks

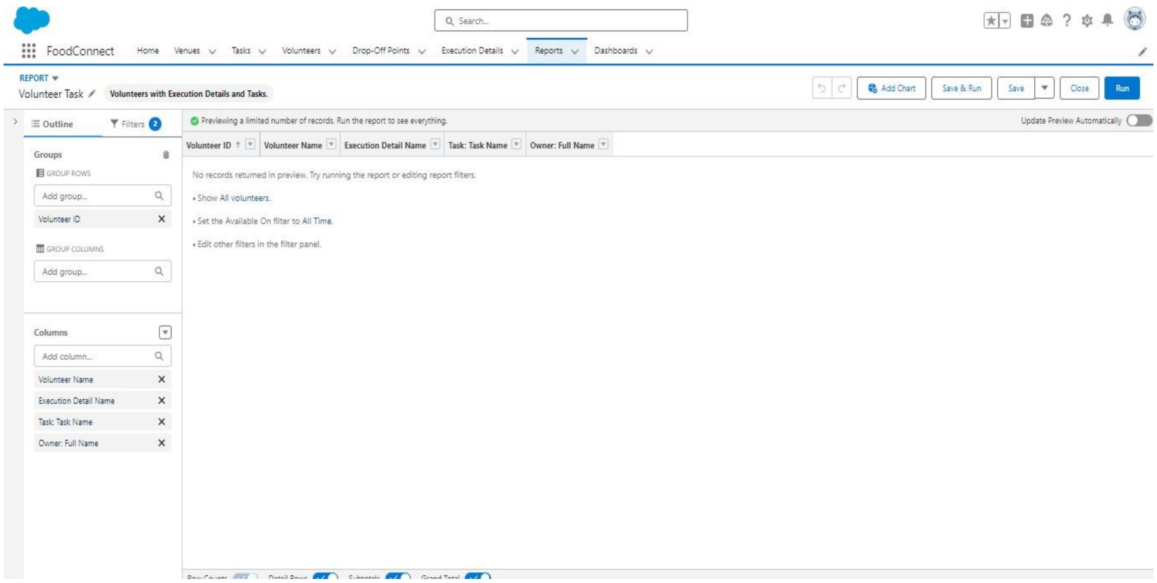
1. Go to the app(FoodConnect) >> click on the reports tab
2. Click on Custom Reports Folder and click on New Report
3. Select Report Type : Volunteers with Execution Details and Tasks.
4. Then click on Start Report.
5. In GROUP ROWS : Volunteer ID
6. In Columns : Add Volunteer : Volunteer Name, Task : Task Name, Execution Detail : Execution Detail Name, Volunteer: Owner Name, Task: Date, Task : Rating.

1. Now click on Save & Run.
2. Give Label as :

Report Name : Volunteer Task

Report Unique Name : Auto Populated

1. Click on Select Folder and select Custom Report, then click on Save.


Search...
FoodConnect
Home
Venues
Tasks
Volunteers
Drop-Off Points
Execution Details
Reports
Dashboards
REPORT
Volunteer Task
Volunteers with Execution Details and Tasks.
Add Chart
Save & Run
Save
Close
Run
Outline
Filters 2
Previewing a limited number of records. Run the report to see everything.
Update Preview Automatically
Volunteer ID
Volunteer Name
Execution Detail Name
Task: Task Name
Owner: Full Name
Groups
GROUP ROWS
Add group...
Volunteer ID
GROUP COLUMNS
Add group...
No records returned in preview. Try running the report or editing report filters.
• Show All volunteers.
• Set the Available On filter to All Time.
• Edit other filters in the filter panel.
Columns
Add column...
Volunteer Name
Execution Detail Name
Task: Task Name
Owner: Full Name

DASHBOARDS

Adding venue and Drop Off point Report to the Dashboard

1. Go to the app(FoodConnect) >> click on the Dashboards tab.
2. Click on New Folder.

Folder Label : Custom

Dashboards Folder Unique

Name : Auto Populated

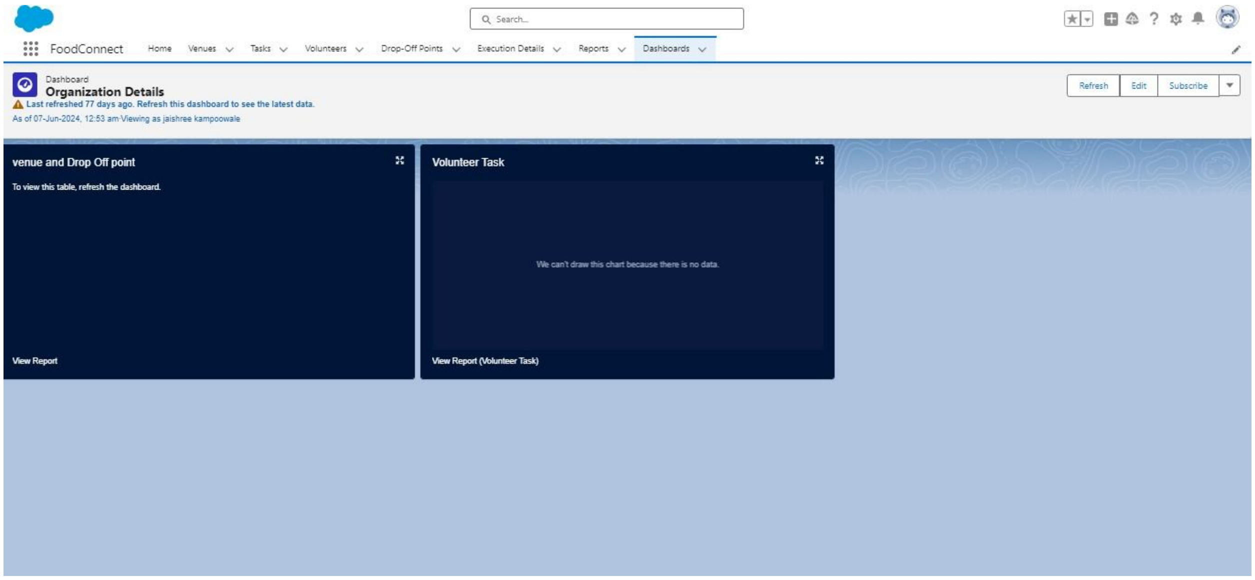
1. Open Custom Dashboards and click on New Dashboards
2. Name : Organization Details
3. Click on Widget and select Chart or Table
4. In Select Report : Select venue and Drop Off point Report.
5. Then click on select
6. In Add Component:

Display As : Select Lightning Table

Component Theme : Select Dark

(Optional)

1. Now click on save.



FoodConnect
Home
Venues
Tasks
Volunteers
Drop-Off Points
Execution Details
Reports
Dashboards
Dashboard
Organization Details
Last refreshed 77 days ago. Refresh this dashboard to see the latest data.
As of 07-Jun-2024, 12:53 am·Viewing as jaishree kampoowale
Refresh
Edit
Subscribe
venue and Drop Off point
To view this table, refresh the dashboard.
View Report
Volunteer Task
We can't draw this chart because there is no data.
View Report (Volunteer Task)

SHARING RULES

Creation of sharing rules

1. Go to setup >> type Sharing Settings in quick find box >> Click on the Sharing Settings.
2. Scroll down and find Drop-Off point Sharing Rules.
3. Click on new near Drop-Off point Sharing Rules and Name it as: Label : Rule 1

   Rule Name : Rule_1
4. Select your rule type : Select Based on criteria.
5. Select which records to be shared:

   Field : Operator : Value = Distance : less than : 15
6. Select the users to share with : Near Share With

   Public Groups : Iksha
7. Click on Save.
8. Click on new near Drop-Off point Sharing Rules and Name it as:

   Label : Rule 2

   Rule Name : Rule_2
9. Select your rule type : Select Based on criteria.
10. Select which records to be shared:

    Field : Operator : Value = Distance : greater than : 15 Field : Operator : Value = Distance : less or equal : 30
11. Select the users to share with : Near Share With

    Public Groups : NSS
12. Click on Save.
13. Click on new near Drop-Off point Sharing Rules and

Name it as: Label : Rule 3

Rule Name : Rule_3

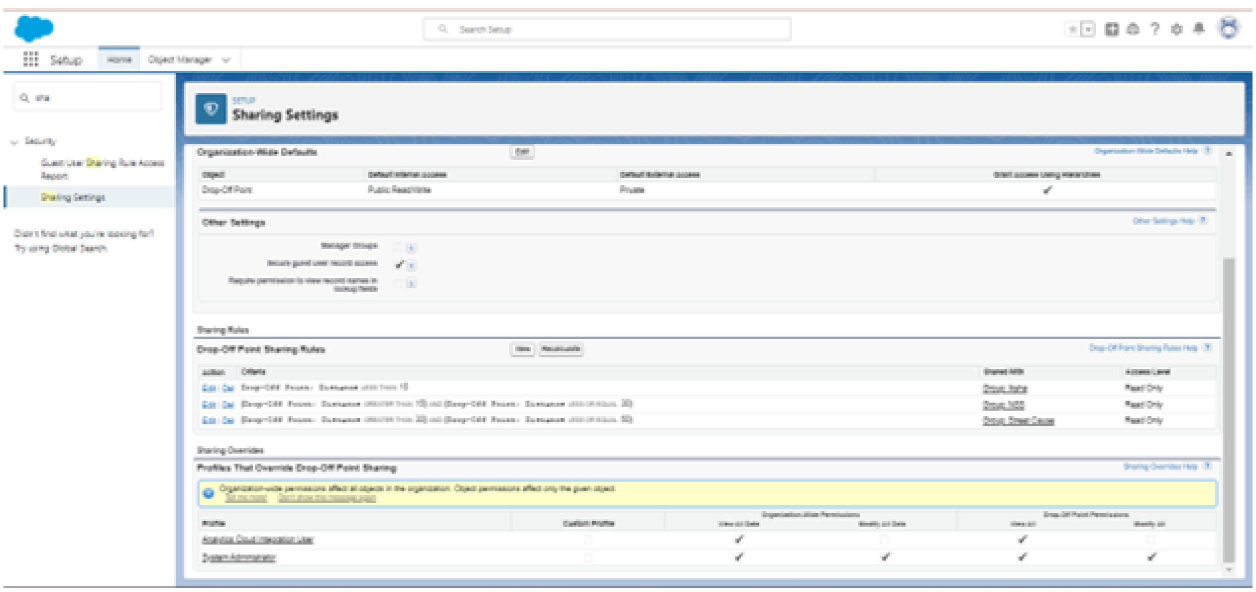
14. Select your rule type : Select Based on criteria.
15. Select which records to be shared:

    Field : Operator : Value = Distance : greater than : 30 Field : Operator : Value = Distance : less or equal : 50

16. Select the users to share with : Near Share With

    Public Groups : Street Cause

17. Click on Save.



HOME PAGE

Creation of Home Page

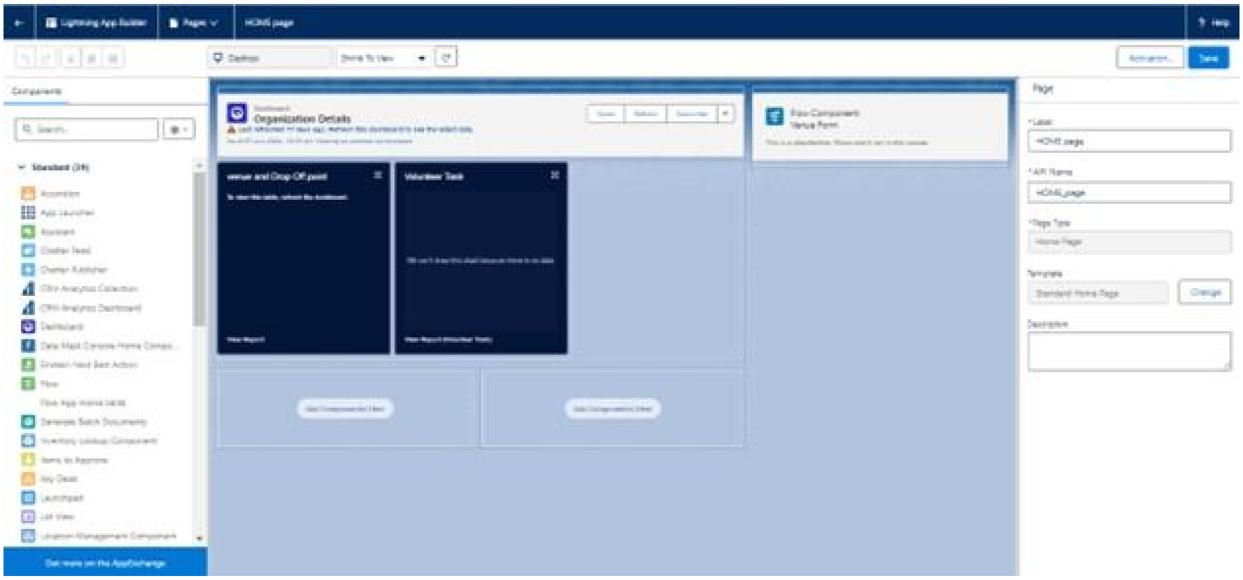
1. Go to setup >> type Lightning App Builder in quick find box >> Click on the Lightning App Builder and Select the New.
2. Select Home Page and give Label as HOME Page.
3. Select Standard Home Page.
4. Near Components search for Flow and Drag and Drop in Right Side Section..
5. On the right

   hand side:

   Flow : Venue

   Flow

1. Near Components search for Dashboard, then Drag and Drop it in first Section.
2. Click on Save and Activation, then click on App Default, then Add Assignments.
3. Add FoodConnect App and then Save.
4. FoodConnect Home Page would Look Like this.


Lightning App Builder
Pages
HOME page
Help
Components
Organization Details
Flow Component
Venue Form
venue and Drop Off point
Volunteer Task
Get more on the AppExchange
Page

CONCLUSION

The Salesforce-based food redistribution project effectively addresses the dual challenges of food waste and hunger by creating a streamlined, organized system for managing surplus food. Through the use of custom objects such as Venue, Dropoff Point, Task, Volunteer, and Execution Details, the platform ensures that all aspects of the food donation and distribution process are meticulously tracked and managed.

By automating key tasks, optimizing logistics, and providing real-time data insights, the project not only improves operational efficiency but also maximizes the impact of food donations. Volunteers are better coordinated, food is delivered promptly and safely, and the system adapts to the needs of both donors and recipients.

Ultimately, this project demonstrates the power of Salesforce in creating scalable, sustainable solutions that benefit both communities and the environment. It sets a precedent for how technology can be leveraged to tackle pressing social issues, offering a replicable model that can be adapted by other communities worldwide to address food insecurity.