



# FOOD

# CONNECT

TO SUPPLY LEFTOVER FOOD TO THE POOR

## **INTRODUCTION**

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I have gained experience in Salesforce CRM, including creating apps, automations, and custom solutions.

This project, "Food Connect", is a reflection of my interest in social innovation and technical development.

Purpose:

Reduce food wastage and supply leftover food to the poor.

## Project Overview

### CRM System for Leftover Food Distribution to the Needy – FOODCONNECT CRM

The **FOODCONNECT CRM** initiative aims to develop a centralized, technology-driven platform that facilitates the redistribution of surplus food from donors—such as restaurants, food businesses, hotels, event organizers, and households—to charitable organizations and individuals in need. The primary goal is to reduce food waste while addressing food insecurity within underserved communities.

This Salesforce-based CRM system will manage the end-to-end lifecycle of food donations, including donor registration, donation tracking, logistics coordination, and impact reporting. It will streamline processes that are traditionally manual and fragmented, ensuring timely and equitable food distribution.

### Key Features

- **Donation Management:** Comprehensive tracking of food donations, including donor details, food types, quantities, expiration dates, and availability.
- **Recipient Coordination:** A structured database for managing and categorizing recipient organizations (e.g., NGOs, shelters, food banks) and individual beneficiaries to ensure fair and need-based distribution.
- **Delivery Logistics:** Integrated scheduling and route optimization for food pickups and deliveries to minimize delays and prevent spoilage.
- **Volunteer and Resource Management:** Tools to onboard, assign, and manage volunteers involved in collection, packaging, and distribution operations.
- **Impact Tracking and Reporting:** Real-time dashboards and analytics to measure the volume of food redistributed, number of people served, geographic coverage, and donor/partner engagement.

### Business Value

The FOODCONNECT CRM addresses key social and operational challenges:

- Reduces food waste by capturing and redistributing surplus food.
- Supports underprivileged communities with consistent food access.
- Enhances operational efficiency for NGOs and volunteer groups.

- Builds trust and transparency with all stakeholders through real-time reporting.
- Encourages donor engagement through automated acknowledgments and impact visibility.

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## **Project Objectives**

The primary objective is to create a scalable and reliable CRM system using Salesforce that:

- Enables systematic tracking of food donations and recipients.
- Automates the logistics of food pickup and delivery.
- Maintains accurate historical data and generates insights.
- Enhances stakeholder engagement through transparent reporting and communication.
- Establishes a replicable model that can be expanded to new regions or partners.

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## **Phase 1: Requirement Analysis & Planning**

### **Understanding Business Requirements**

The platform must serve as a bridge between surplus food sources and distribution agents such as NGOs and volunteer networks. Key requirements include:

- Real-time tracking of available food donations and inventory.
- Scheduling mechanisms to ensure timely pickup and delivery.
- Monitoring and logging of delivery completion and recipient reach.
- A system that minimizes manual intervention and supports operational transparency.

### **Project Scope and Objectives**

- Develop a custom Salesforce CRM to manage donor and recipient profiles.
- Automate scheduling of pickups based on food type, quantity, and location.
- Maintain historical records of donations and deliveries for tracking and compliance.

- Implement real-time notifications for pickups and automated acknowledgments for donors.
- Create dynamic dashboards to visualize impact metrics and donor participation.

## Data Model Design

The data architecture includes the following custom Salesforce objects:

Object	Description
<b>Donor</b>	Stores information about organizations or individuals contributing food.
<b>Food Donation</b>	Logs details of donated food including quantity, type, preparation and expiration dates.
<b>Pickup Schedule</b>	Links food donations with scheduled pickup time, volunteer, and route.
<b>Recipient</b>	Maintains records of NGOs, shelters, or individual beneficiaries.
<b>Distribution Record</b>	Captures delivery details, recipient feedback, and confirmation.

Relationships:

- **Donor → Food Donation:** One-to-many
- **Food Donation → Pickup Schedule:** One-to-one
- **Distribution Record → Recipient:** Many-to-one

## Security Model Design

To ensure data confidentiality and role-based access, the following Salesforce security components are implemented:

- **Profiles and Permission Sets:** Define specific access levels based on user roles.
- **Role Hierarchies:** Allow upper-level users to view subordinate data where applicable.
- **Sharing Rules:** Enable controlled data visibility across partners when collaboration is required.

**Roles Defined:**

- **Restaurant Managers** – Can view and manage their donations.
  - **NGO Coordinators** – Can manage deliveries and beneficiary records.
  - **Volunteer Drivers** – Can view assigned pickups and update statuses.
  - **Admins** – Have full system access for configuration and support.
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## **Phase 2: Salesforce Development – Backend & Configuration**

### **Environment Setup & DevOps Workflow**

A dedicated **Salesforce Sandbox Environment** was established to facilitate initial development and testing. This approach ensures that customizations, configurations, and object designs can be implemented without impacting live data or users.

To manage deployments:

- **Change Sets** are used for migrating metadata from Sandbox to Production in a controlled manner.
- Version control practices are followed for structured deployments and rollback capability.
- The sandbox is refreshed periodically to maintain alignment with production data structures and configurations.

### **Core Configuration Activities Completed:**

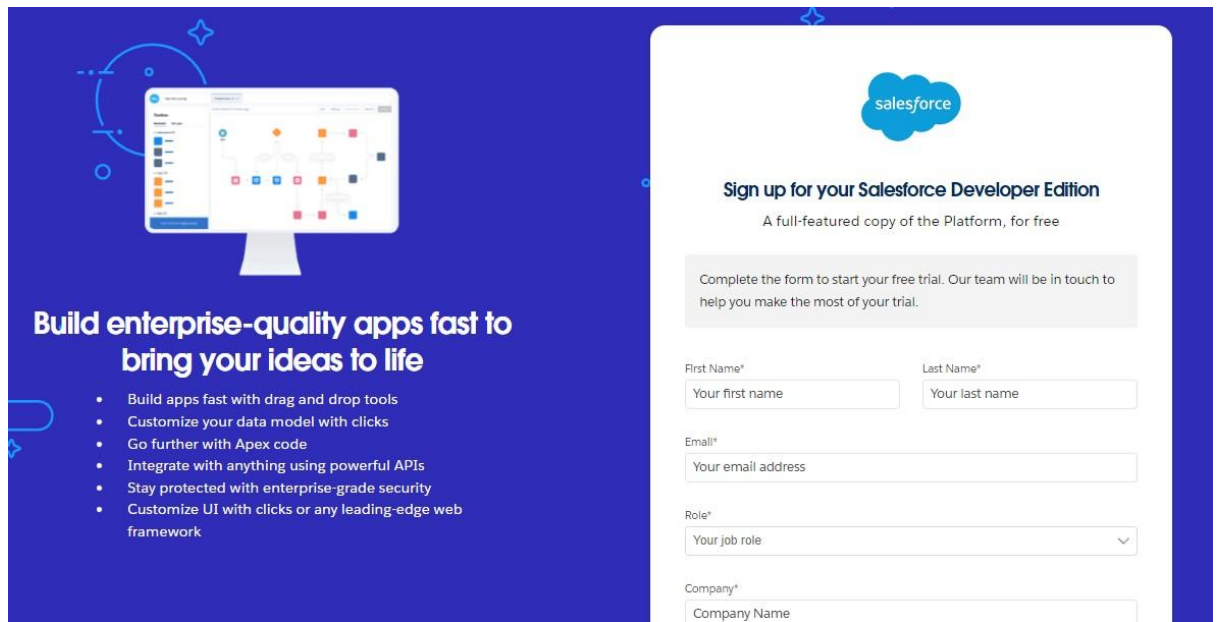
- Custom objects and fields created for donors, donations, recipients, schedules, and distribution records.
- Validation rules and workflows implemented to enforce data integrity.
- Role-based access and sharing models configured.
- Basic page layouts and list views customized for user-friendliness.

## **IMPLEMENTATION-**

### **Creating Developer Account**

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details  
:



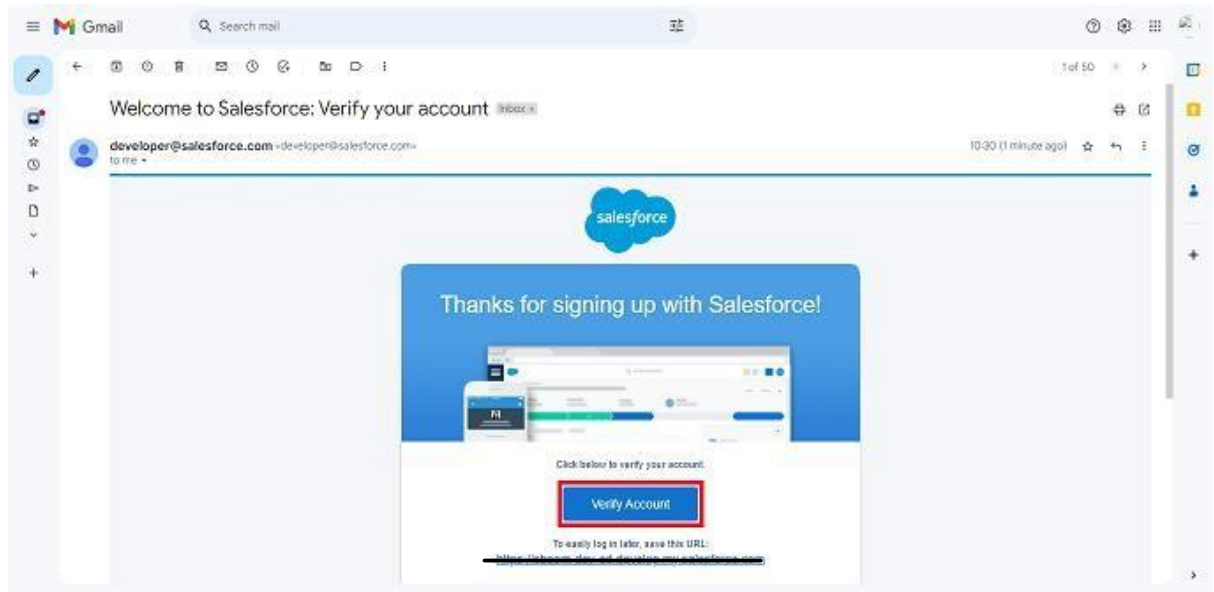
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College or Company Name
5. Country : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format :  
username@organization.com

Click on sign me up after filling these.

### Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



Change Your Password

Enter a new password for lead@sb.com.  
Make sure to include at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

\* New Password  
..... Good

\* Confirm New Password  
..... Match

Security Question  
▼ In what city were you born?

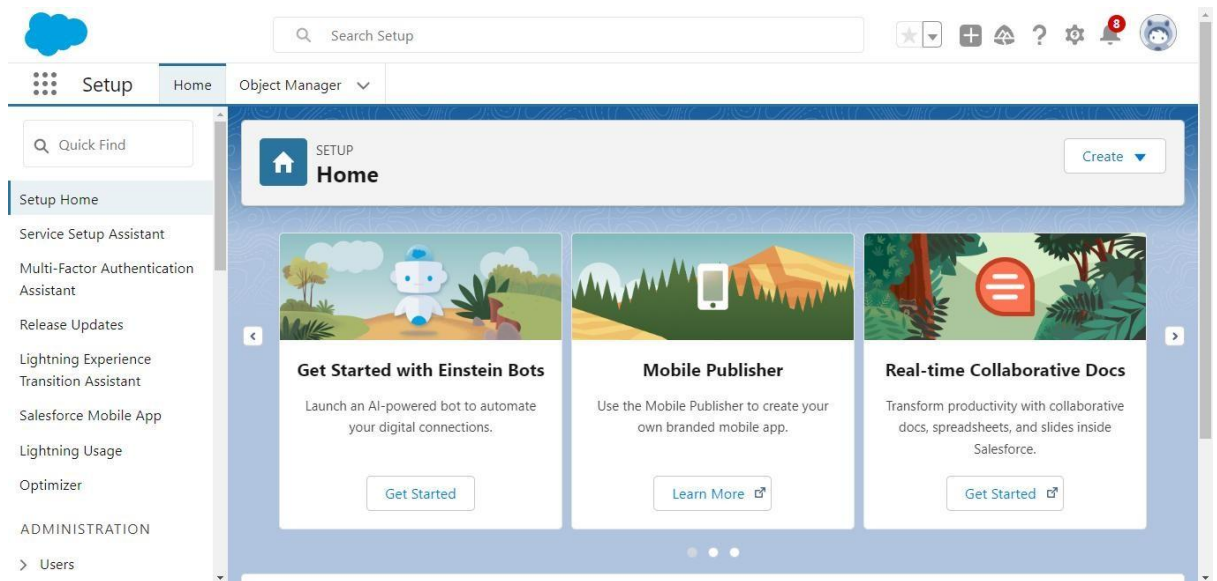
\* Answer  
asdfghjkl

Change Password

Click on Verify Account

1. Give a password and answer a security question and click on change password.
2. Give a password and answer a security question and click on change password.
3. Then you will redirect to your salesforce setup page.



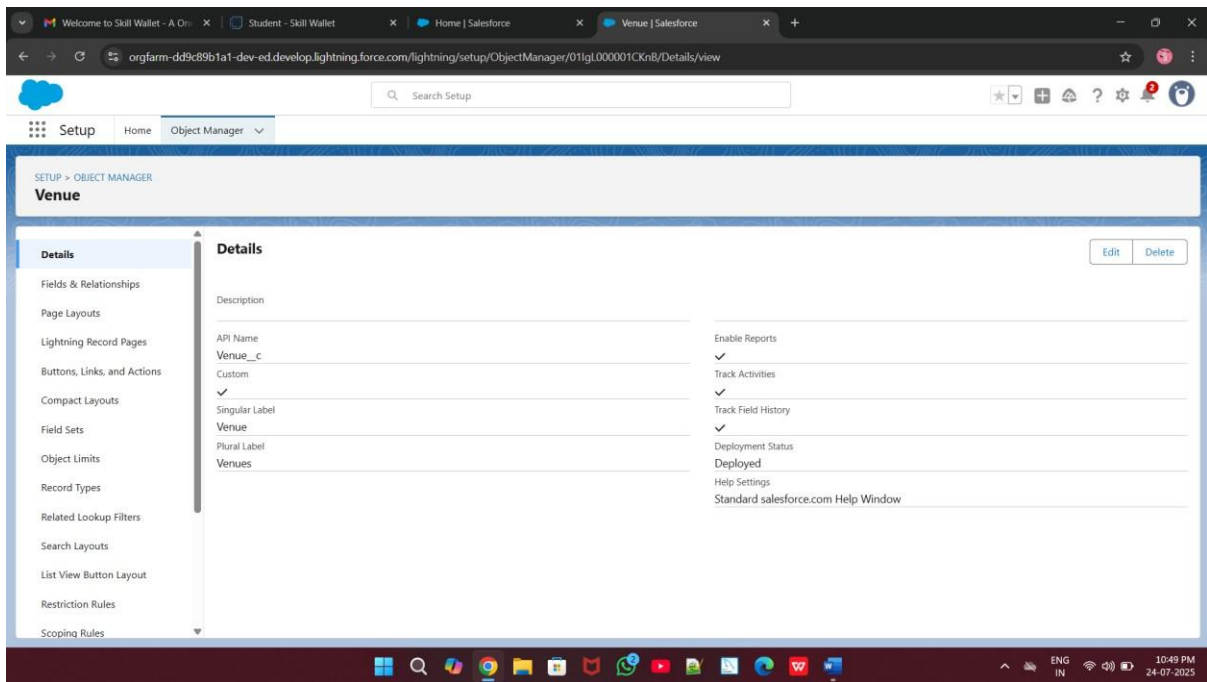


## OBJECTS-

### Create Venue Object

To create an object:

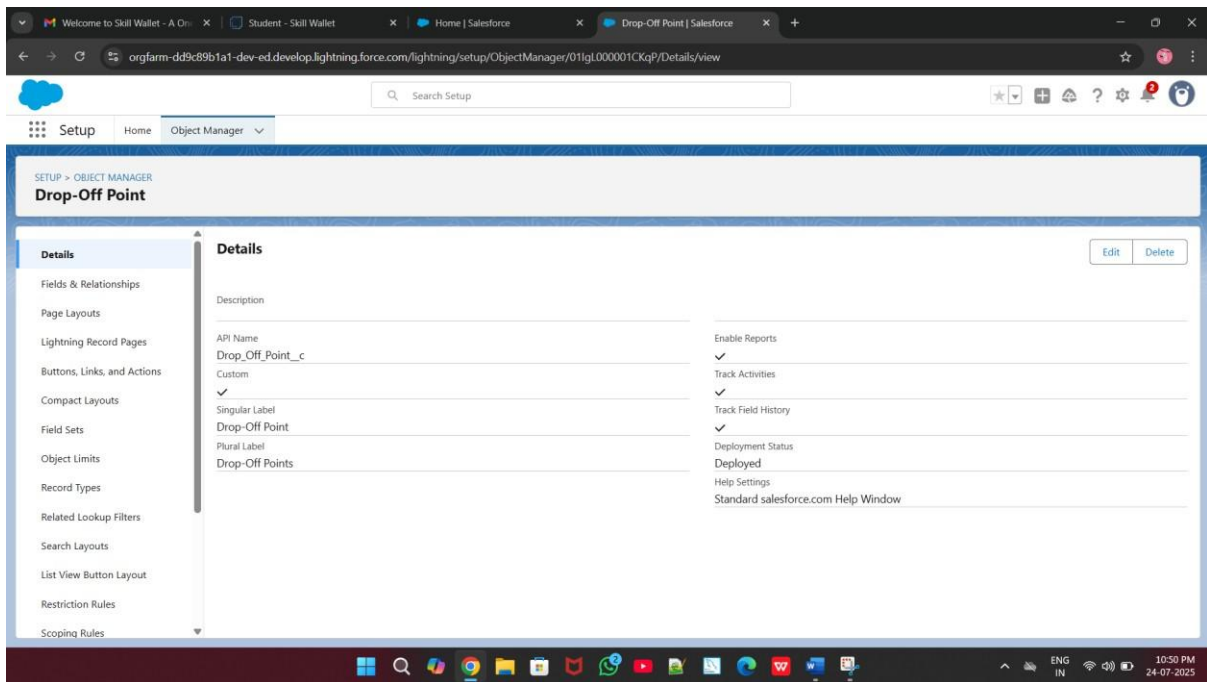
1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
  1. Enter the label name >> Venue
  2. Plural label name >> Venues
  3. Enter Record Name Label and Format
    - Record Name >> Venue Name
    - Data Type >> Text
2. Click on Allow reports and Track Field History, Allow Activities.
3. Allow search >> Save.



## Create Drop-Off Point Object

To create an object:

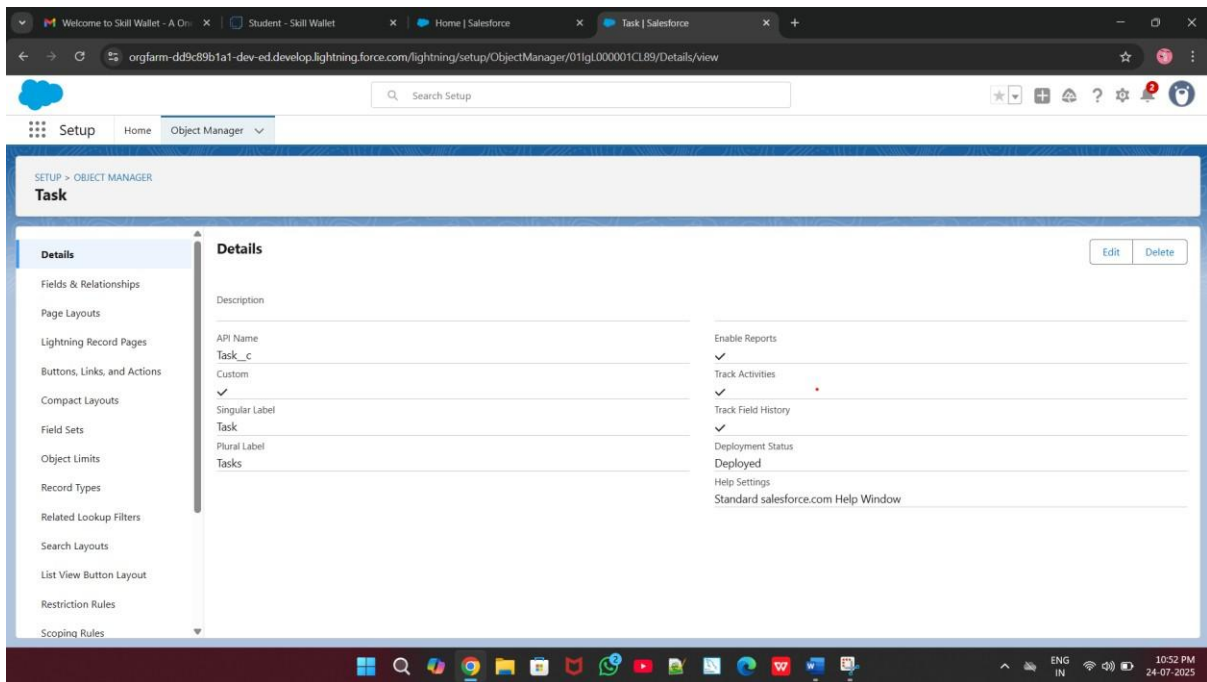
1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
  1. Enter the label name >> Drop-Off Point
  2. Plural label name>> Drop-Off Points
  3. Enter Record Name Label and Format
    - Record Name >> Drop-Off point Name
    - Data Type >> Text
2. Click on Allow reports and Track Field History, Allow Activities
3. Allow search >> Save.



## Create Task Object

To create an object:

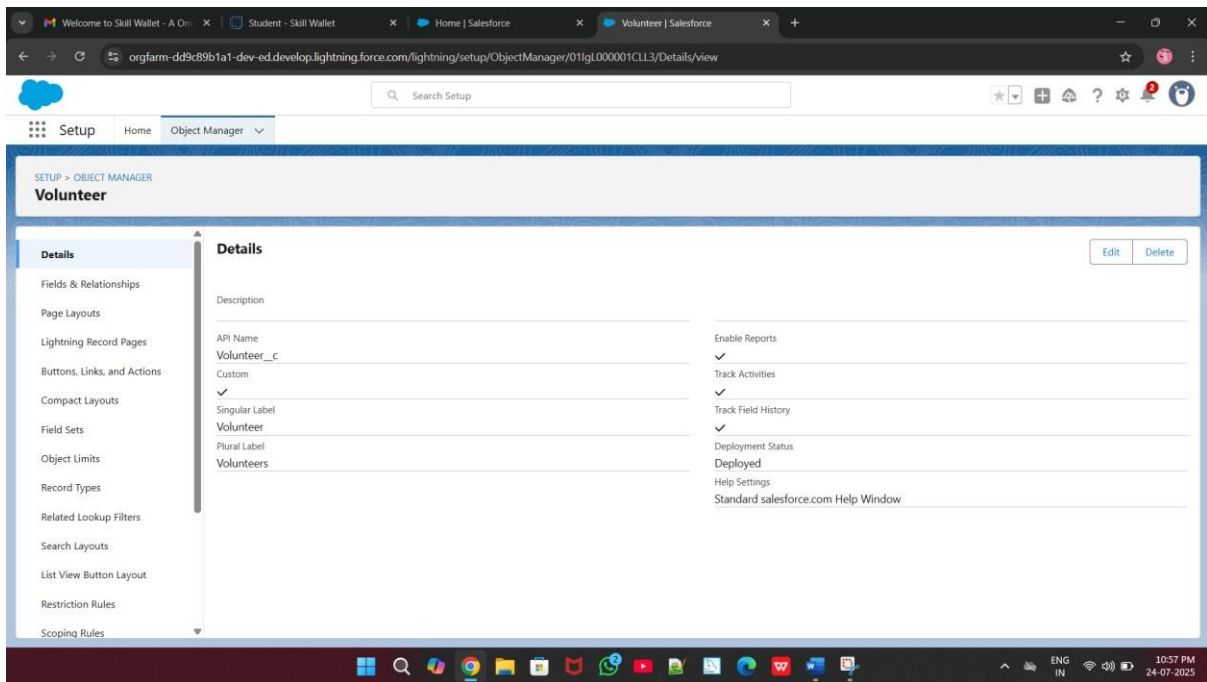
1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
  1. Enter the label name>> Task
  2. Plural label name>> Tasks
  3. Enter Record Name Label and Format
    - Record Name >> Task Name
    - Data Type >> Text
2. Click on Allow reports and Track Field History, Allow Activities
3. Allow search >> Save.



## Create Volunteer Object

To create an object:

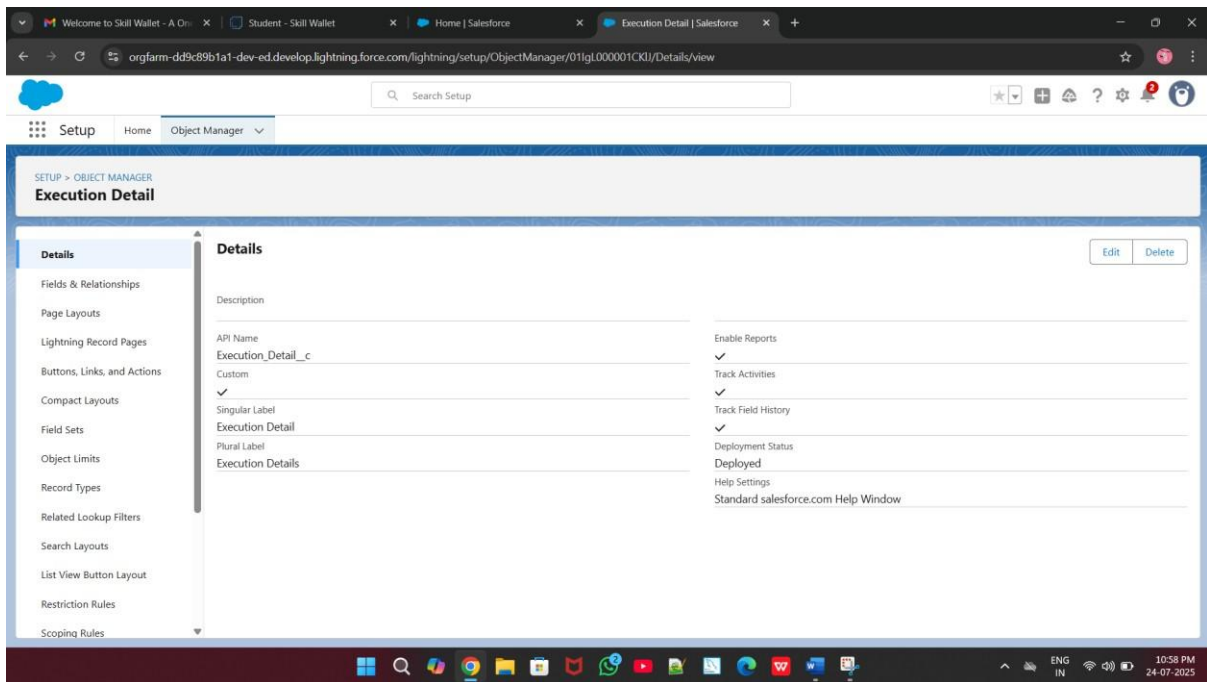
1. From the setup page >> Click on Object Manager>> Click on Create >> Click on Custom Object.
  1. Enter the label name>> Volunteer
  2. Plural label name>> Volunteers
  3. Enter Record Name Label and Format
    - Record Name >> Volunteer Name
    - Data Type >> Text
2. Click on Allow reports and Track Field History, Allow Activities
3. Allow search >> Save.



## Create Execution Details Object

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
  1. Enter the label name >> Execution Detail
  2. Plural label name >> Execution Details
  3. Enter Record Name Label and Format
    - Record Name >> Execution Detail Name
    - Data Type >> Text
2. Click on Allow reports and Track Field History, Allow Activities
3. Allow search >> Save.



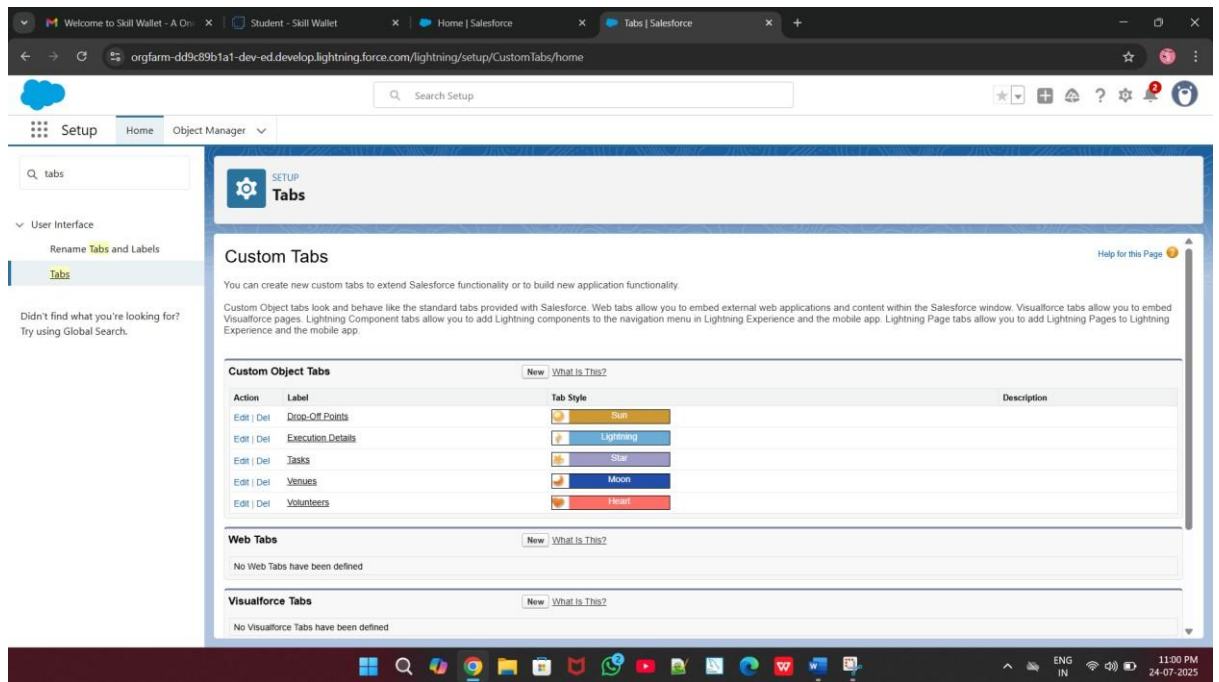
## Tabs

What is Tab : 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)



1. 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 .
2. Make sure that the Append tab to users' existing personal customizations is checked. 3. Click save

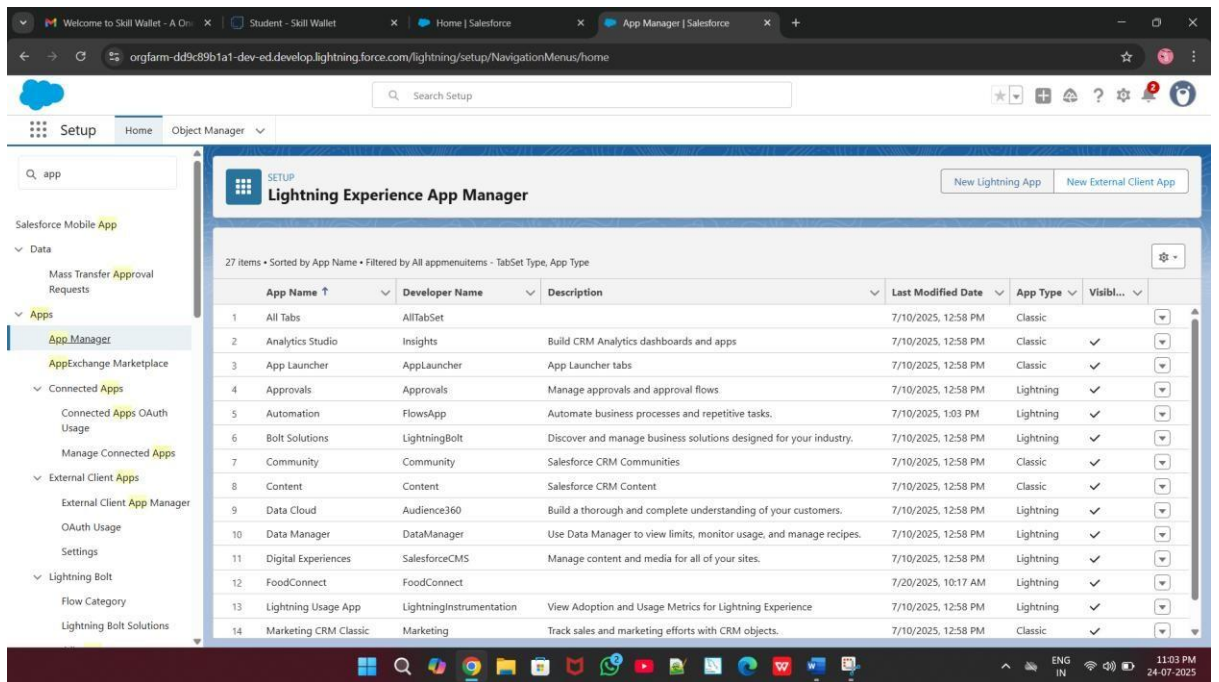
## Creating Remaining Tabs

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 in Activity -1 .

## The Lightning App 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.



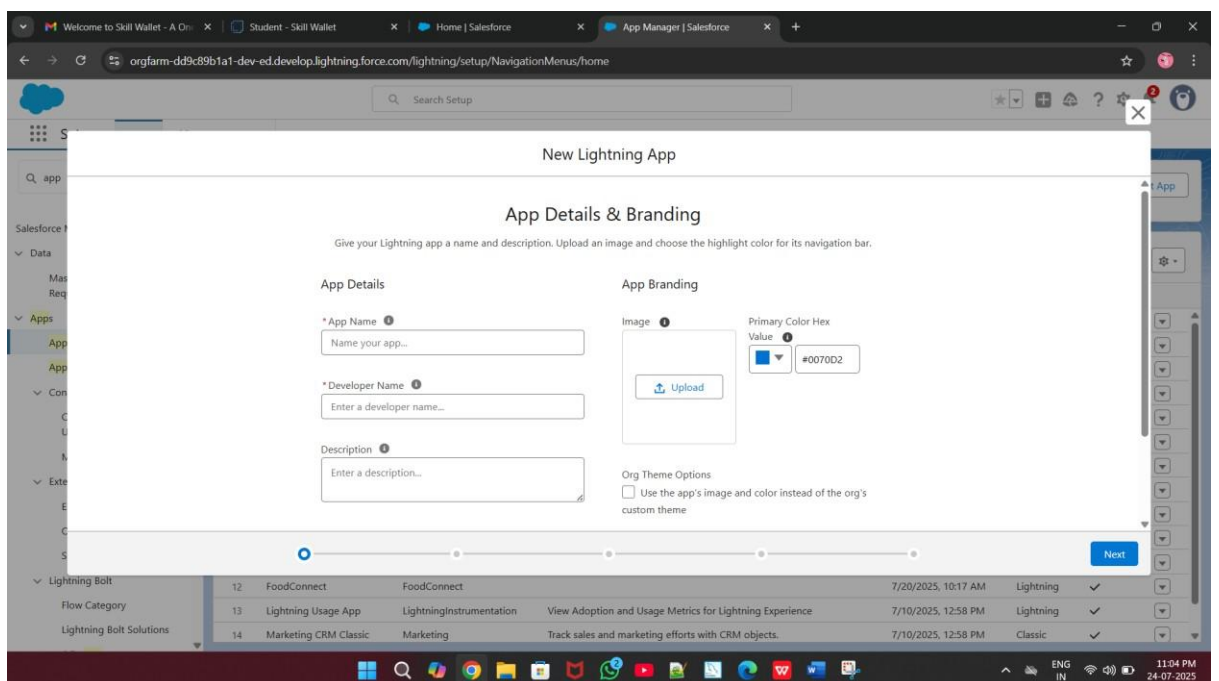
2. Fill the app name in app details and branding as follow

App Name : FoodConnect

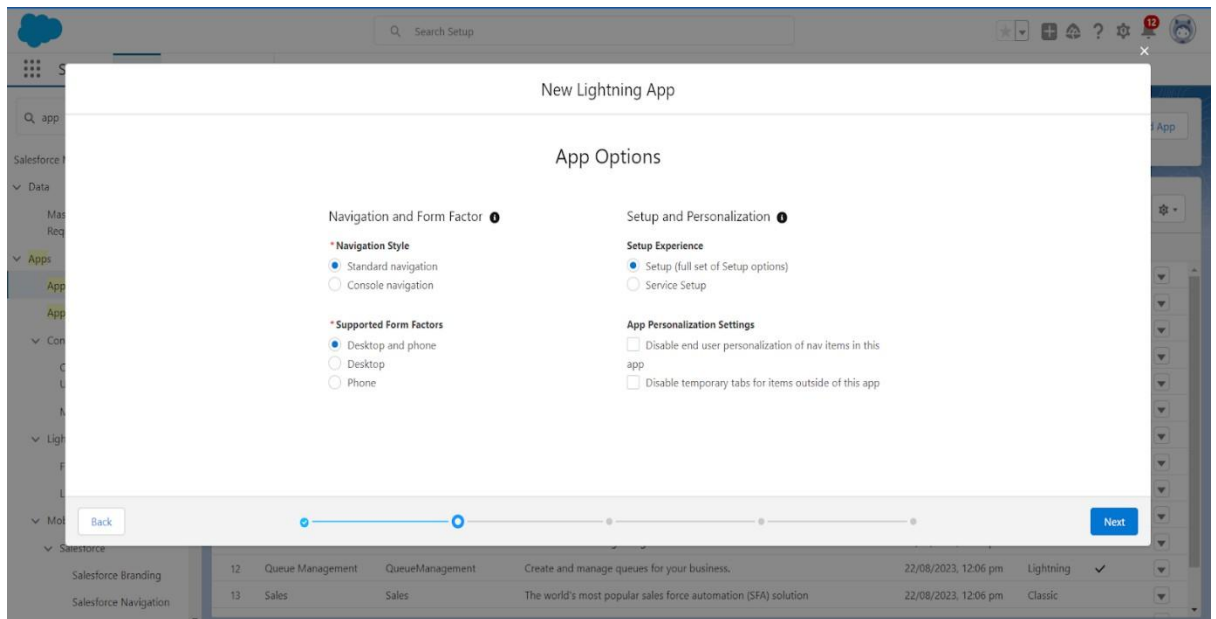
Developer Name : This will auto populated

Image : optional (if you want to give any image you can otherwise not mandatory) Primary color hex value : keep this default.

3. Then click Next >> (App option page) Set Navigation Style as Standard Navigation >> Next.

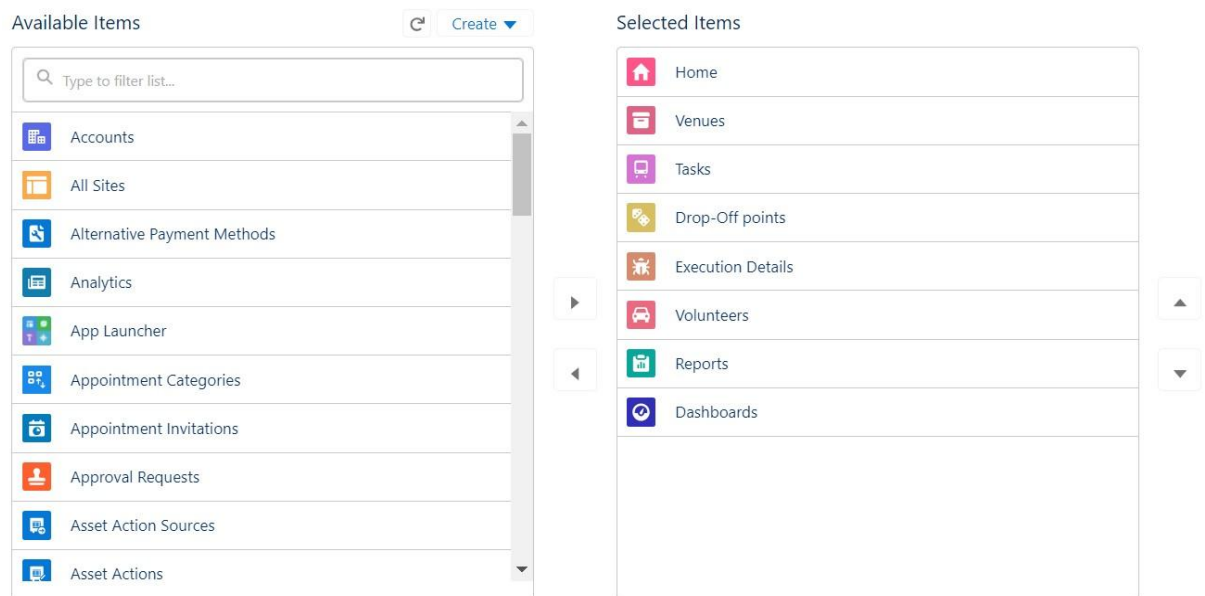






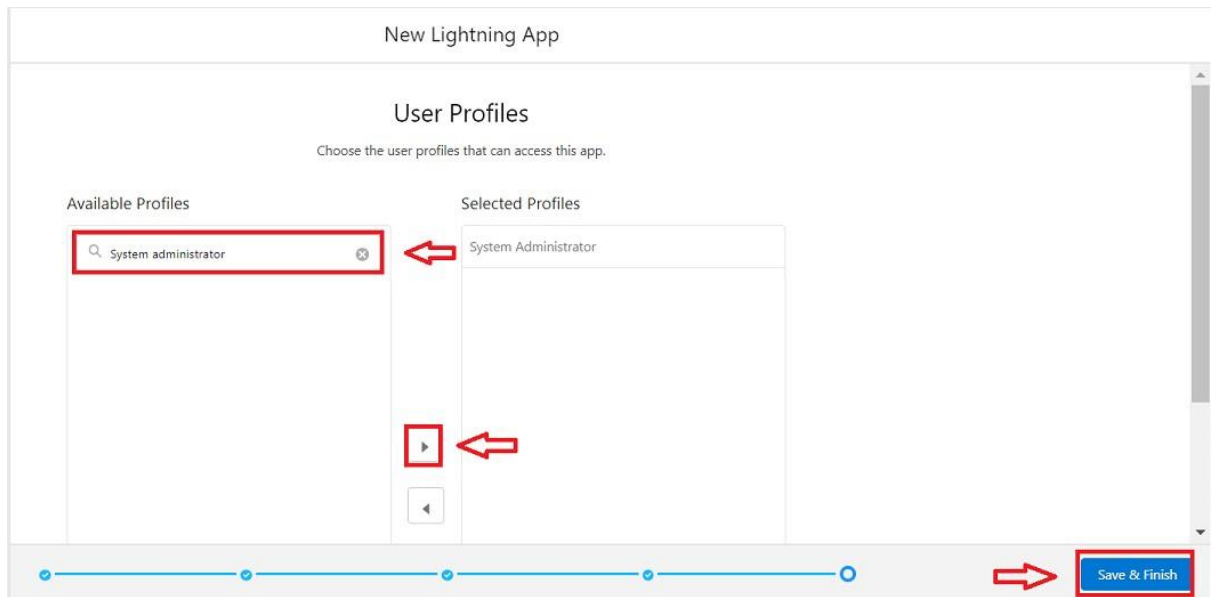
4. (Utility Items) keep it as default >> Next.

5. 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.

6. To Add User Profiles:

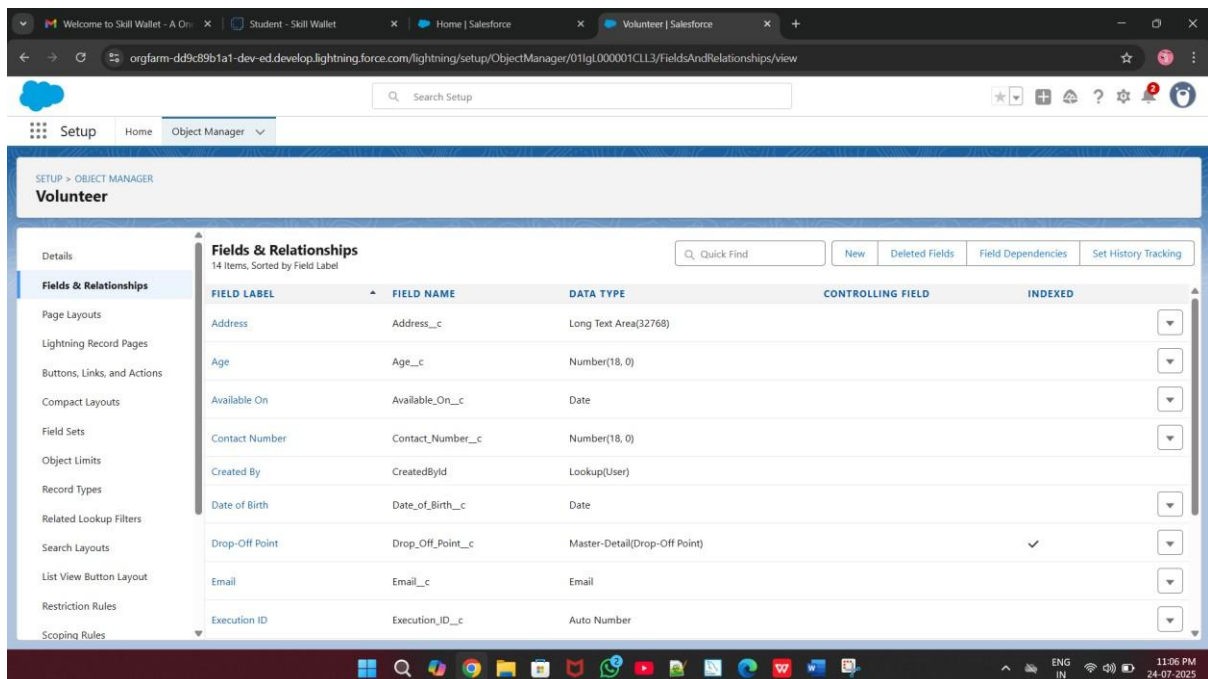


Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

## Fields Creation of Relationship fields in objects

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.

#### Creation of Master Detail Relationship Field on Execution Details Object :

8. Go to setup >> click on Object Manager >> type object name(Execution Details) in the search bar >> click on the object.
9. Now click on “Fields & Relationships” >> New
10. Select Master Detail relationship
11. Select the related object “Volunteer” and click next.
12. Field Name : Volunteer
13. Field label : Auto generated
14. Next >> Next >> Save.

#### Creation of Master Detail Relationship Field on Execution Details Object :

15. Go to setup >> click on Object Manager >> type object name(Execution Details) in the search bar >> click on the object.
16. Now click on “Fields & Relationships” >> New
17. Select Master Detail relationship
18. Select the related object “Task” and click next.
19. Field Name : Task 20. Field label : Auto generated
21. Next >> Next >> Save.

#### Creation of Lookup Relationship Field on Drop-Off Point Object :

22. Go to setup >> click on Object Manager >> type object name(Drop-Off Point) in the search bar >> click on the object.
23. Now click on “Fields & Relationships” >> New
24. Select Lookup relationship
25. Select the related object “Venue” and click next.
26. Field Name : Venue
27. Field label : Venue\_\_c
28. Next >> Next >> Save.

### Creation of Lookup Relationship Field on Task Object :

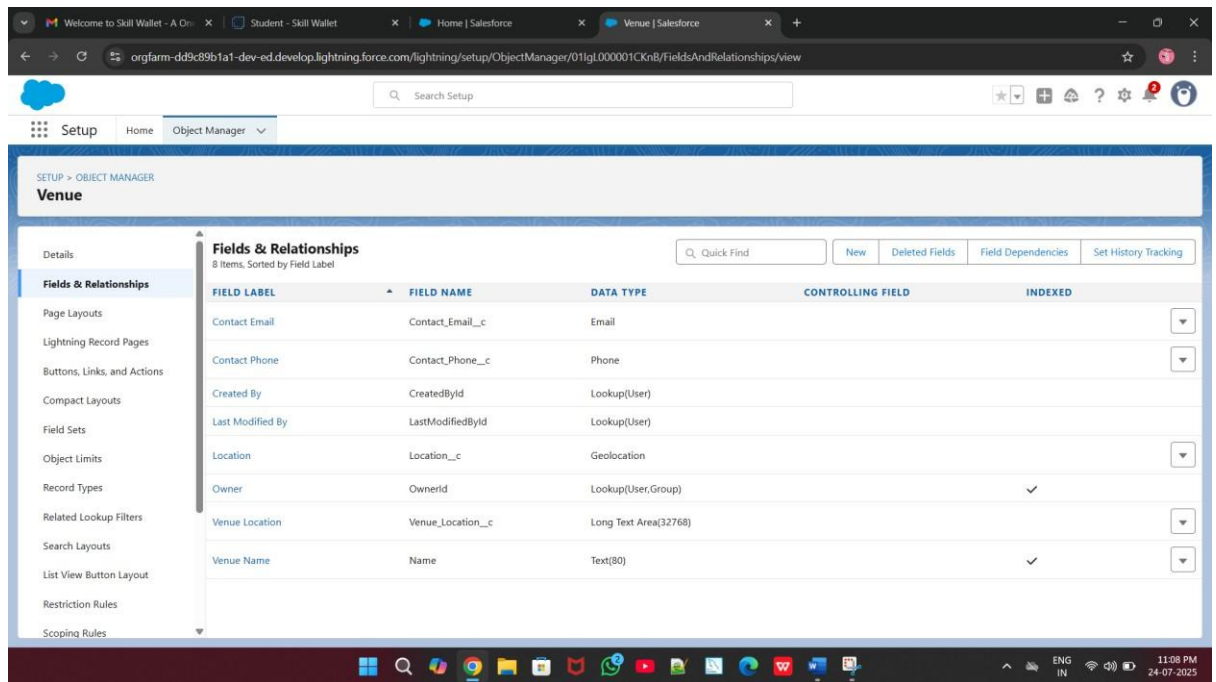
29. Go to setup>> click on Object Manager >> type object name(Task) in the search bar >> click on the object.
30. Now click on “Fields & Relationships” >> New
31. Select Lookup relationship
32. Select the related object “Venue” and click next.
33. Field Name : Sponsored By 34. Field label : Auto generated
35. Next >> Next >> Save.

### Creation of Lookup Relationship Field on Task Object :

36. Go to setup>> click on Object Manager >> type object name(Task) in the search bar >> click on the object.
37. Now click on “Fields & Relationships” >> New
38. Select Lookup relationship
39. Select the related object “Drop-Off point” and click next.
40. Field Name : Drop-Off point 41. Field label : Auto generated
42. Next >> Next >> Save.

### Creation of fields for the Venue object

1. Go to setup>> click on Object Manager >> type object name(Venue) in search bar >> click on the object.



2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Email” and Click on Next
4. Fill the Above as following:
  - Field Label : Contact Email
  - Field Name : Contact Email
  - Click on required check box
  - Click on Next >> Next >> Save and new.

### **To create another fields in an object:**

5. Go to setup >> click on Object Manager >> type object name(Venue) in search bar >> click on the object.
6. Now click on “Fields & Relationships” >> New
7. Select Data type as a “Phone” and Click on Next
8. Fill the Above as following:
  - Field Label : Contact Phone
  - Field Name : Contact Phone
  - Click on required check box
  - Click on Next >> Next >> Save and new.

**To create another fields in an object:**

1. Go to setup >> click on Object Manager >> type object name(Venue) in search bar >>click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Geolocation” and Click on Next
4. Fill the Above as following:
  - Field Label : Location
  - Decimal Places : 4
  - Field Name : Location
  - Description : Enter the Geolocation of your Venue
  - Click on Next >> Next >> Save and new.

**To create another fields in an object:**

9. Go to setup >> click on Object Manager >> type object name(Venue) in search bar >> click on the object.
10. Now click on “Fields & Relationships” >> New
11. Select Data type as a “Long Text Area” and Click on Next
12. Fill the Above as following:
  - Field Label : Venue Location
  - Field Name : Venue\_Location
  - Click on Next >> Next >> Save and new.

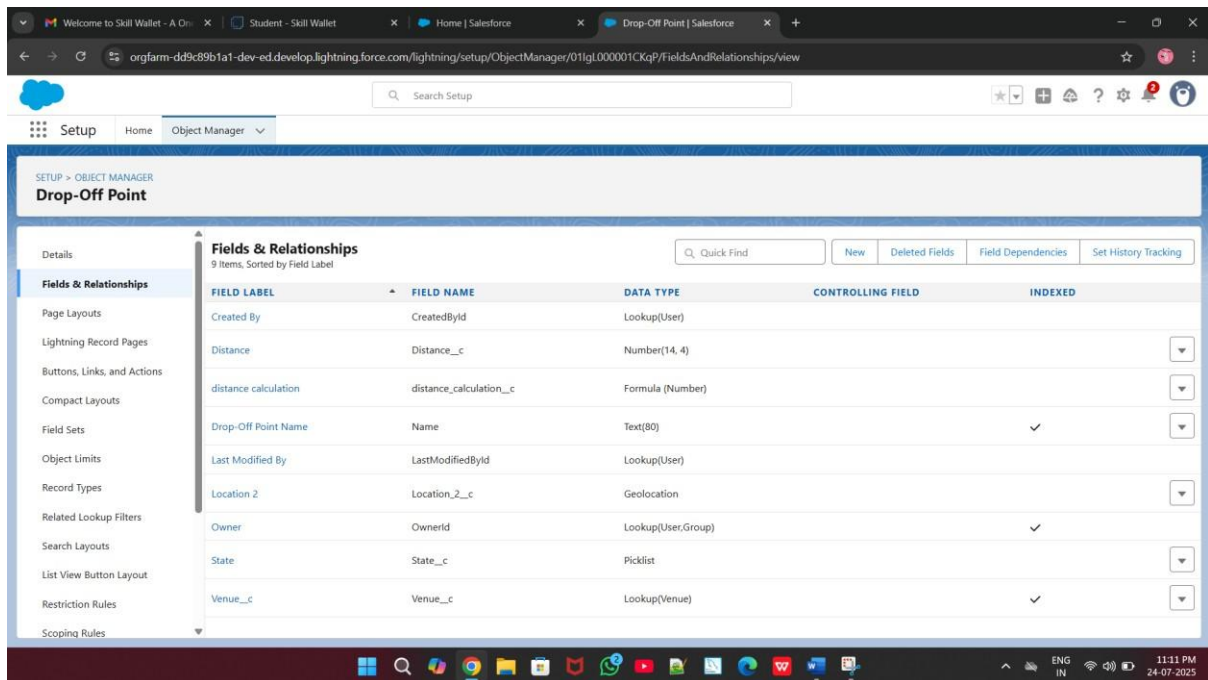
**Creation of fields for the Drop-Off point object**

Go to setup >> click on Object Manager >> type object name(Drop-Off point) in search bar >> click on the object.

2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Geolocation” and Click on Next
4. Fill the Above as following:
  - Field Label : Location 2
  - Field Name : gets auto generated
  - Description : Enter the Geolocation of the Drop off Point
  - Geolocation Options : select Decimal
  - Decimal Places : 4
  - Click on Next >> Next >> Save and new.

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Drop-Off point) in search bar >> click on the object.



2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Formula” and Click on Next
4. Fill the Above as following:
  - Field Label : distance calculation
  - Field Name : distance\_calculation
  - Formula Return Type : Number
  - Formula Options : `DISTANCE( Location_2__c , Venue__r.Location__c , 'km')`
  - Click on Next >> Next >> Save and new.

To create another fields in an object:

5. Go to setup >> click on Object Manager >> type object name(Drop-Off point) in search bar >> click on the object.
6. Now click on “Fields & Relationships” >> New
7. Select Data type as a “Picklist” and Click on Next
8. Fill the Above as following:
  - Field Label : State
  - Field Name : State

- Enter values, with each value separated by a new line :

Andhra Pradesh

Arunachal Pradesh

Assam

Bihar

Chhattisgarh

Goa

Gujarat

Haryana

Himachal Pradesh

Jharkhand Karnataka

Kerala

Maharashtra

Madhya Pradesh

Manipur

Meghalaya

Mizoram

Nagaland

Odisha

Punjab

Rajasthan

Sikkim

Tamil Nadu

Tripura

Telangana

Uttar Pradesh

Uttarakhand

West Bengal

Andaman & Nicobar (UT)

Chandigarh (UT)

Dadra & Nagar Haveli and Daman & Diu (UT)

Delhi [National Capital Territory (NCT)]

Jammu & Kashmir (UT)

Ladakh (UT)

Lakshadweep (UT)

Puducherry (UT)

- Click on required check box
- Click on Next >> Next >> Save and new.

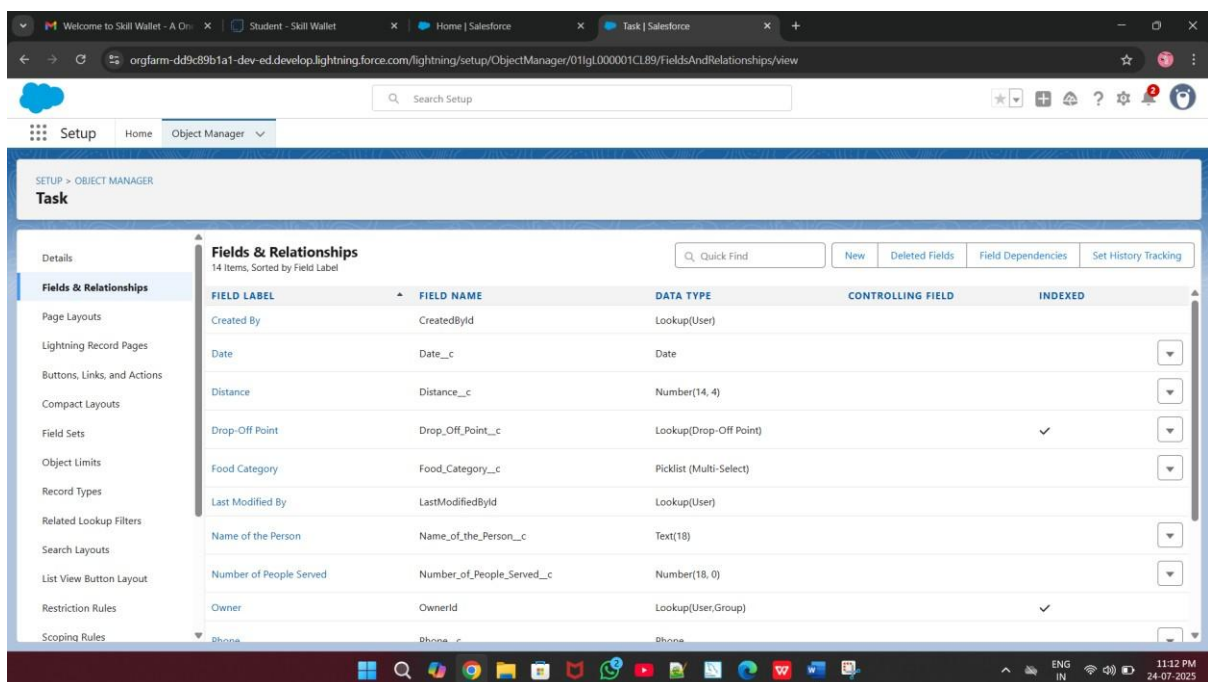


To create another fields in an object:

9. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
10. Now click on “Fields & Relationships” >> New
11. Select Data type as a “Number” and Click on Next
12. Fill the Above as following:
  - Field Label : Distance
  - Field Name : Distance
  - Length : 14
  - Decimal Places : 4
  - Click on required check box
  - Click on Next >> Next >> Save and new.

## Creation of fields for the Task object

Go to setup>> click on Object Manager >> type object name(Task) in search bar >> click on the object.



2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Auto Number” and Click on Next
4. Fill the Above as following:
  - Field Label : Task ID
  - Display Format : TASK-{0}
  - Starting Number : 1
  - Field Name : gets auto generated

- Click on required check box
- Click on Next >> Next >> Save and new.

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Date” and Click on Next
4. Fill the Above as following:
  - Field Label : Date
  - Field Name : Date
  - Click on required check box
  - Click on Next >> Next >> Save and new.

To create another fields in an object:

5. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
6. Now click on “Fields & Relationships” >> New
7. Select Data type as a “Picklist (Multi-Select)” and Click on Next
8. Fill the Above as following:
  - Field Label : Food Category
  - Field Name : Food Category
  - Enter values, with each value separated by a new line :  
Veg  
Non-Veg  
Salad  
Snack
  - Click on required check box
  - Click on Next >> Next >> Save and new.

To create another fields in an object:

9. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
10. Now click on “Fields & Relationships” >> New
11. Select Data type as a “Number” and Click on Next
12. Fill the Above as following:

- Field Label : Number of People Served
- Field Name : Number\_of\_People\_Served
- Click on required check box
- Click on Next >> Next >> Save and new.

To create another fields in an object:

13. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
14. Now click on “Fields & Relationships” >> New
15. Select Data type as a “Text” and Click on Next 16. Fill the Above as following:
  - Field Label : Name of the Person
  - Field Name : Name\_of\_the\_Person
  - Click on Next >> Next >> Save and new.

To create another fields in an object:

17. Go to setup>> click on Object Manager >> type object name(Task) in search bar >> click on the object.
18. Now click on “Fields & Relationships” >> New
19. Select Data type as a “Phone” and Click on Next 20. Fill the Above as following:
  - Field Label : Phone
  - Field Name : Phone
  - Click on Next >> Next>> Save and new.

To create another fields in an object:

21. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
22. Now click on “Fields & Relationships” >> New
23. Select Data type as a “Pick List” and Click on Next
24. Fill the Above as following:
  - Field Label : Rating
  - Field Name : Rating
  - Enter values, with each value separated by a new line :
    - 1
    - 2

3

4

5

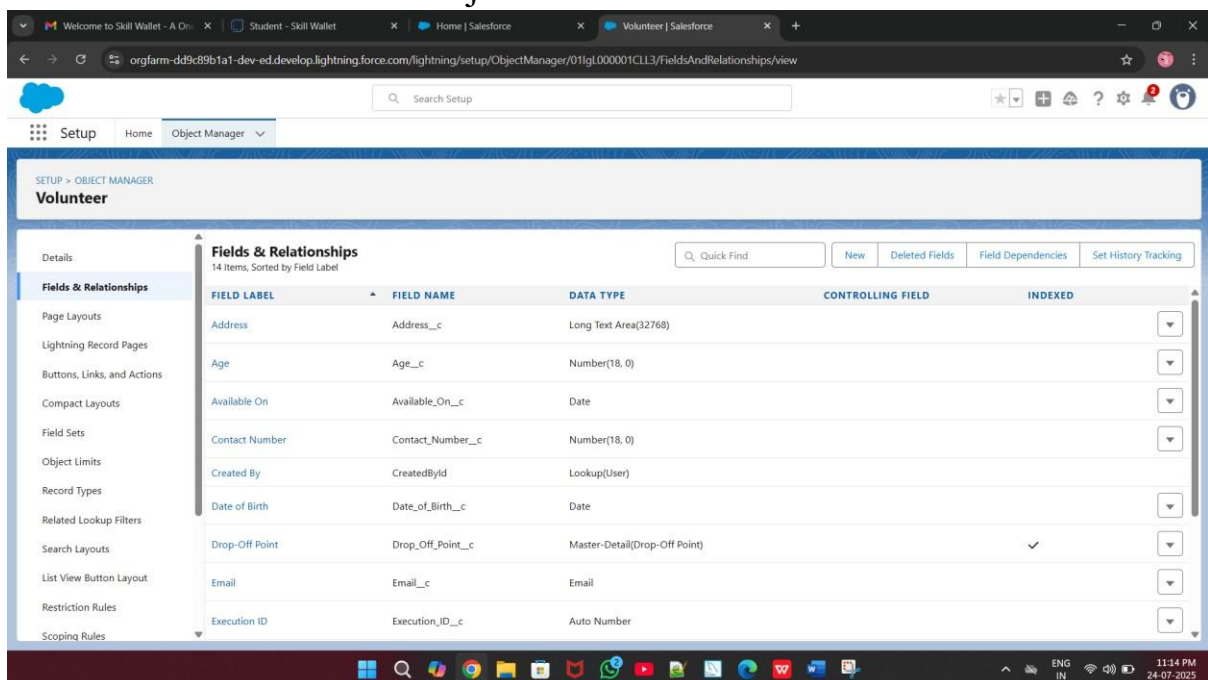
- Click on Next >> Next >> Save and new.

To create another fields in an object:

25. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
26. Now click on “Fields & Relationships” >> New
27. Select Data type as a “Long Text Area” and Click on Next 28. Fill the Above as following:
  - Field Label : Feedback
  - Field Name : Feedback
  - Click on Next >> Next >> Save and new.

## Creation of fields for the Volunteer object

1. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.



2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Auto Number” and Click on Next
4. Fill the Above as following:
  - Field Label : Volunteer ID

- Field Name : gets auto generated
- Click on required check box
- Click on Next >> Next >> Save and new.
- Click on Next >> Next >> Save and new.

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Picklist” and Click on Next 4. Fill the Above as following:
  - Field Label : Gender
  - Field Name : Gender
  - Enter values, with each value separated by a new line :  
Female  
Male
  - Click on Next >> Next >> Save and new.

To create another fields in an object:

5. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
6. Now click on “Fields & Relationships” >> New
7. Select Data type as a “Date” and Click on Next
8. Fill the Above as following:
  - Field Label : Available On
  - Field Name : Available On
  - Click on required check box
  - Click on Next >> Next >> Save and new.

To create another fields in an object:

9. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
10. Now click on “Fields & Relationships” >> New
11. Select Data type as a “Number” and Click on Next
12. Fill the Above as following:

- Field Label : Age
- Field Name : Age
- Click on required check box
- Click on Next >> Next>> Save and new.

To create another fields in an object:

13. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
14. Now click on “Fields & Relationships” >> New
15. Select Data type as a “Email” and Click on Next 16. Fill the Above as following:
  - Field Label : Email
  - Field Name : Email
  - Click on required check box
  - Click on Next>> Next >> Save and new.

To create another fields in an object:

17. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
18. Now click on “Fields & Relationships” >> New
19. Select Data type as a “Number” and Click on Next
20. Fill the Above as following:
  - Field Label : Contact Number
  - Field Name : Contact\_Number
  - Click on required check box
  - Click on Next >> Next >> Save and new.

To create another fields in an object:

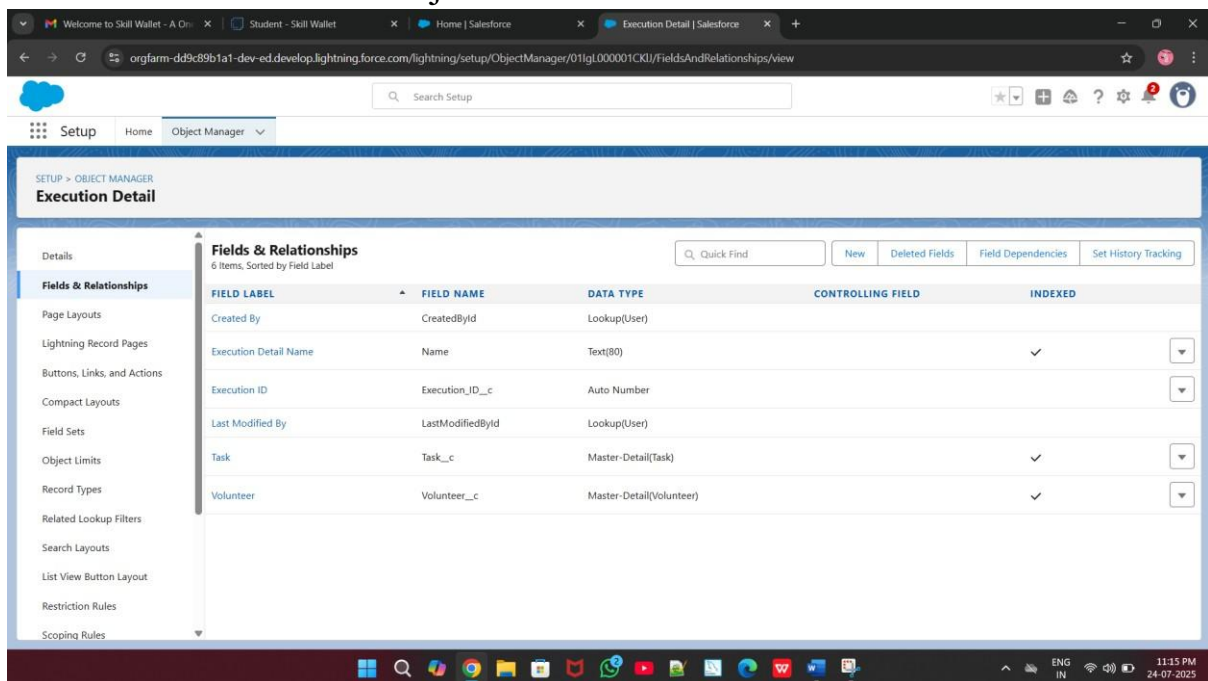
21. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
22. Now click on “Fields & Relationships” >> New
23. Select Data type as a “Text Area (Long)” and Click on Next 24. Fill the Above as following:
  - Field Label : Address
  - Field Name : Address
  - Click on Next >> Next >> Save and new.

To create another fields in an object:

25. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
26. Now click on “Fields & Relationships” >> New
27. Select Data type as a “Date” and Click on Next 28. Fill the Above as following:
  - Field Label : Date of Birth
  - Field Name : Date\_of\_Birth
  - Click on Next >> Next >> Save and new.

## Creation of fields for the Execution Details object

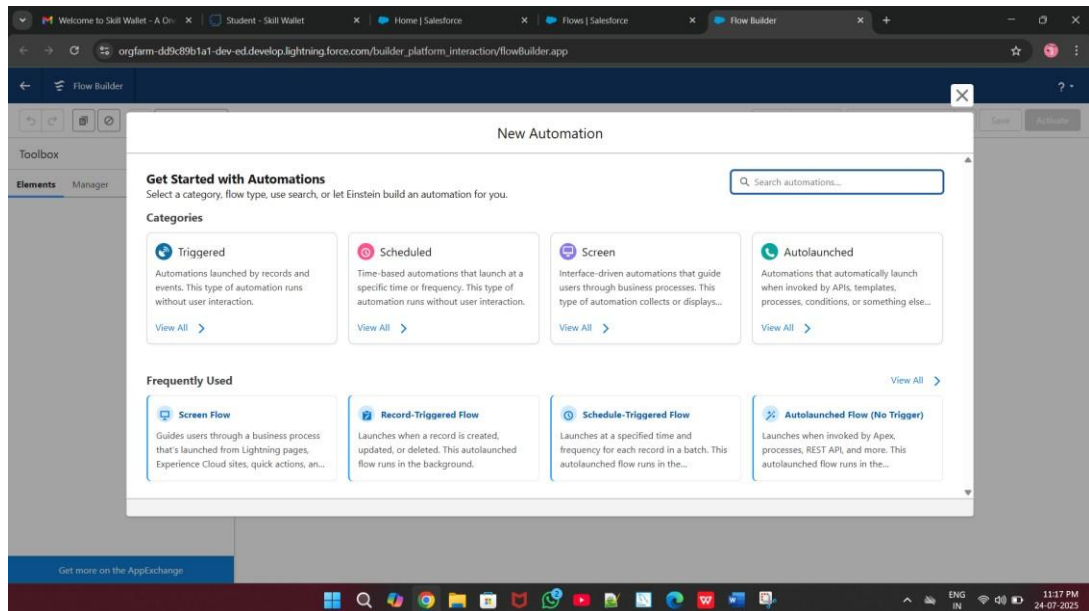
- 1.Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.



2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Auto Number” and Click on Next
4. Fill the Above as following:
  - Field Label : Execution ID
  - Field Name : gets auto generated
  - Click on required check box
  - Click on Next >> Next >> Save and new.

## FLOWS Create Flow to create a record in Venue object

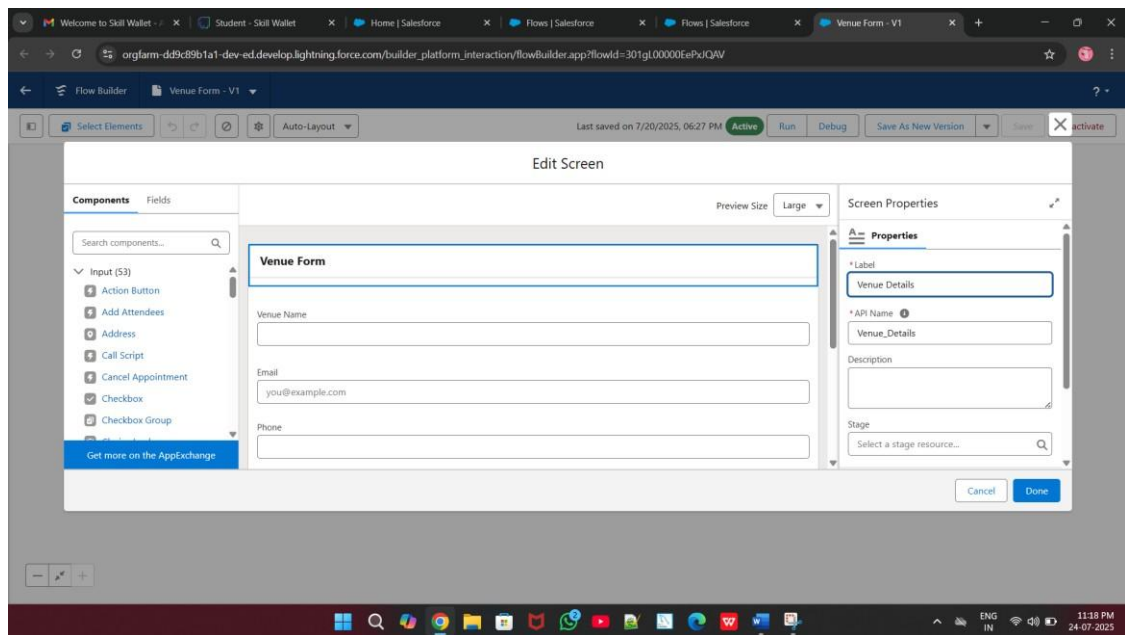
1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.
2. Select the Screen flow. Click on create.



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 look 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}

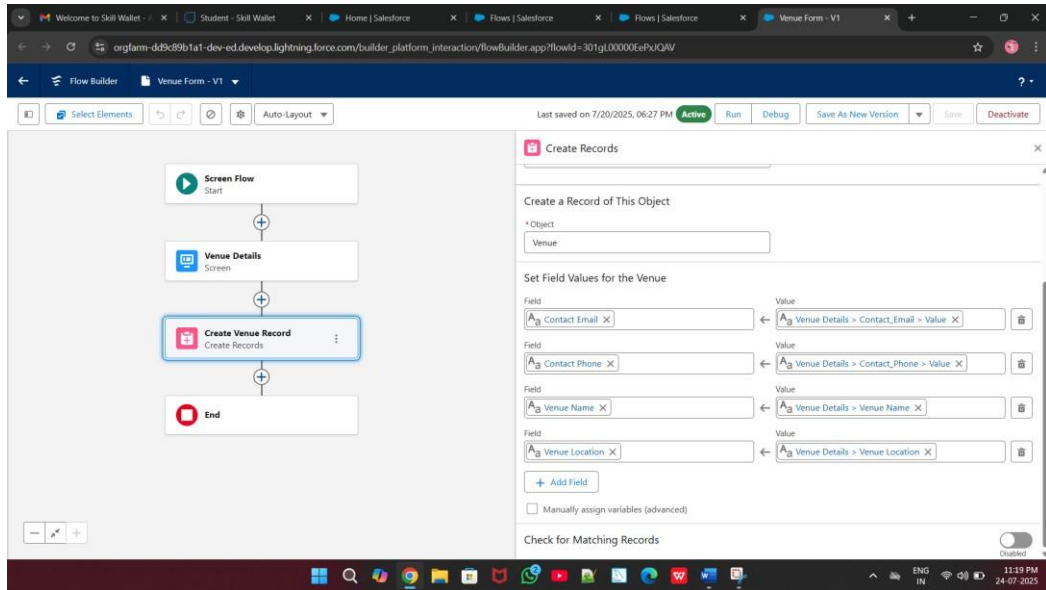
Field : Value = Contact\_Phone\_\_c : {!Contact\_Phone.value}

Field : Value = Name : {!Venue\_Name}

Field : Value = Venue\_Location\_\_c : {!location}

Field : Value = Location\_\_Latitude\_\_s : {!latitude} Field : Value = Location\_\_Longitude\_\_s : {!longitude}

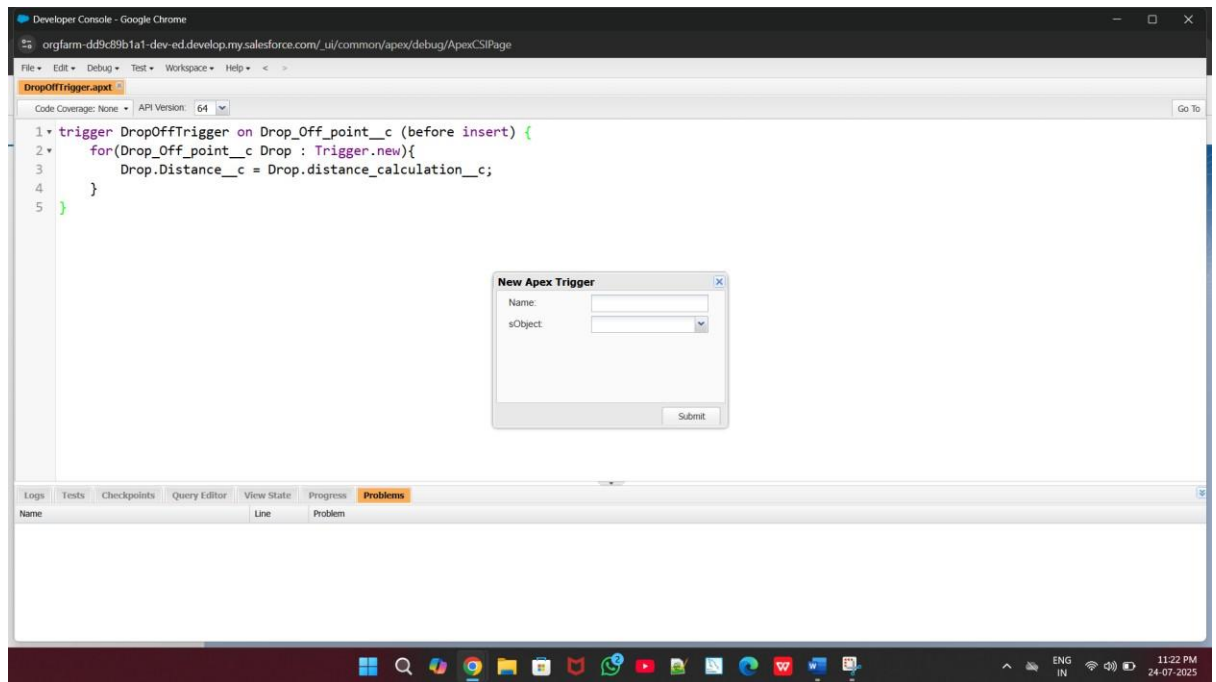
14. This would look like:



15. Click on Save as: Flow Label : Venue Form  
Flow API Name : Venue\_Form

## 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.

## 7. Trigger Code

8. (This Trigger is to assign Distance field to the Distance Calculation field. So that we can assign the distance in the sharing rules.)
- 9.

## 10. Code:

11.

12. trigger DropOffTrigger on Drop\_Off\_point\_\_c (before insert)
13. {
14. for(Drop\_Off\_point\_\_c Drop : Trigger.new){
15. Drop.Distance\_\_c = Drop.distance\_calculation\_\_c;
16. }

## 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

## 2. Creation of Users

3. 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

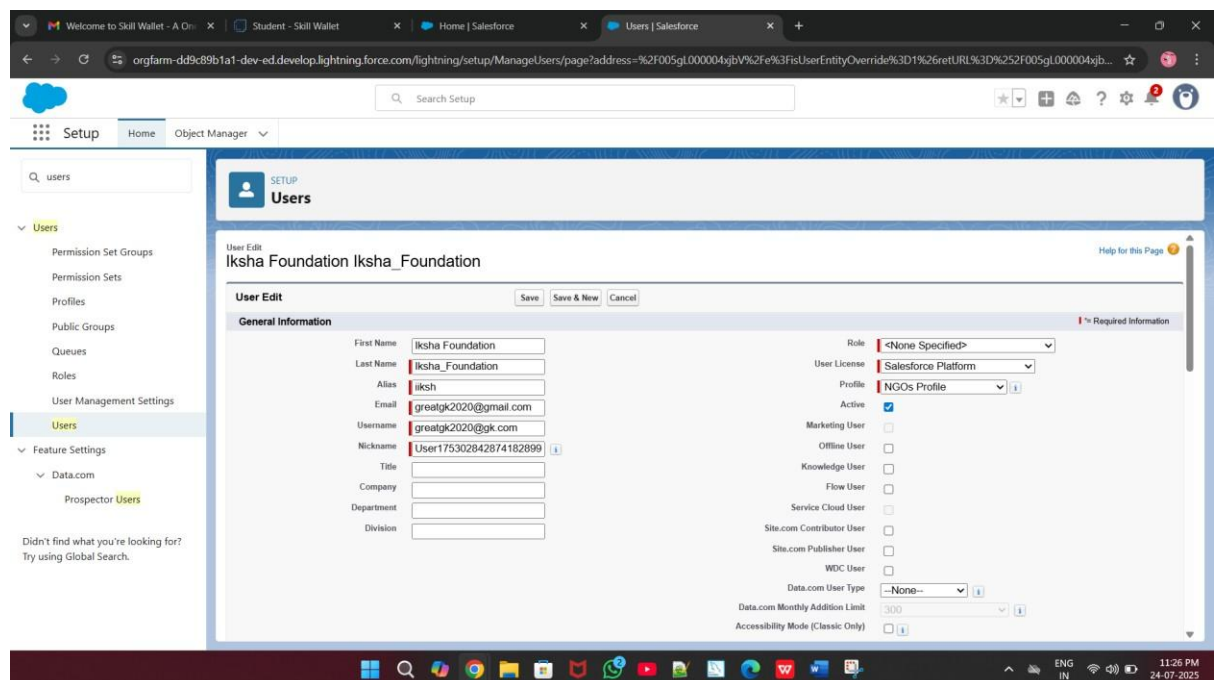
Username : [ikshafoundation@sb.com](mailto:ikshafoundation@sb.com) (give the username different)

Nickname : Auto Populated

User License : Salesforce Platform

Profile : NGOs Profile

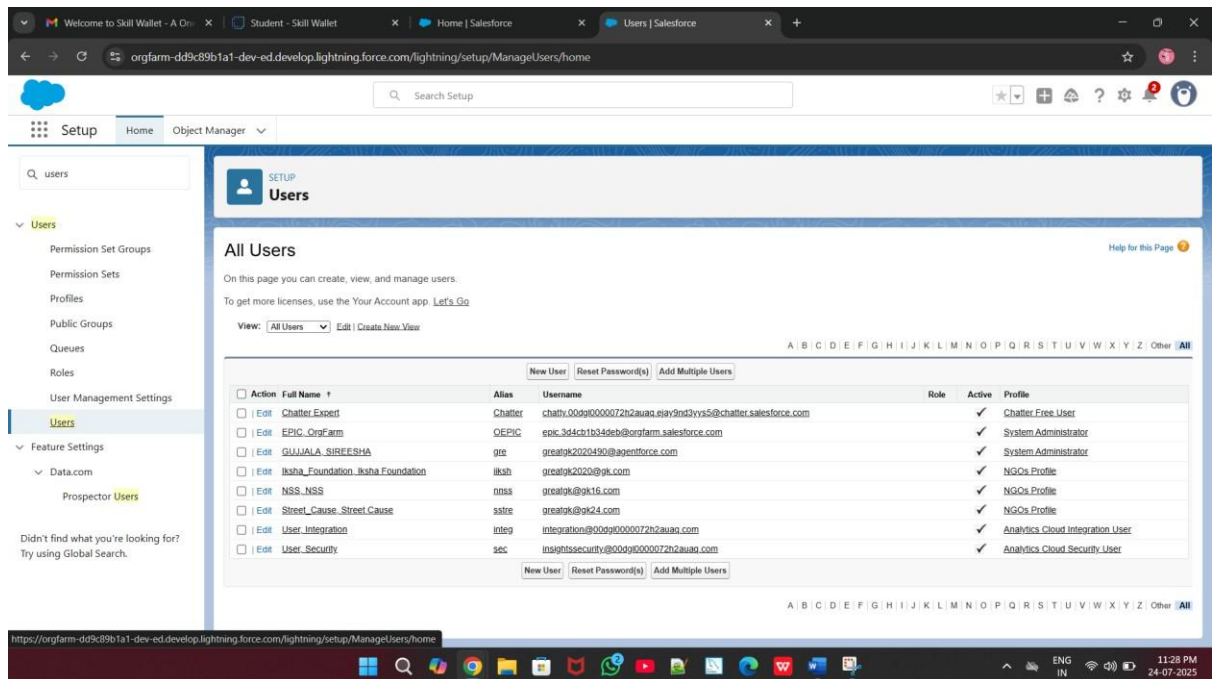
Active : Check



3. Click on Save

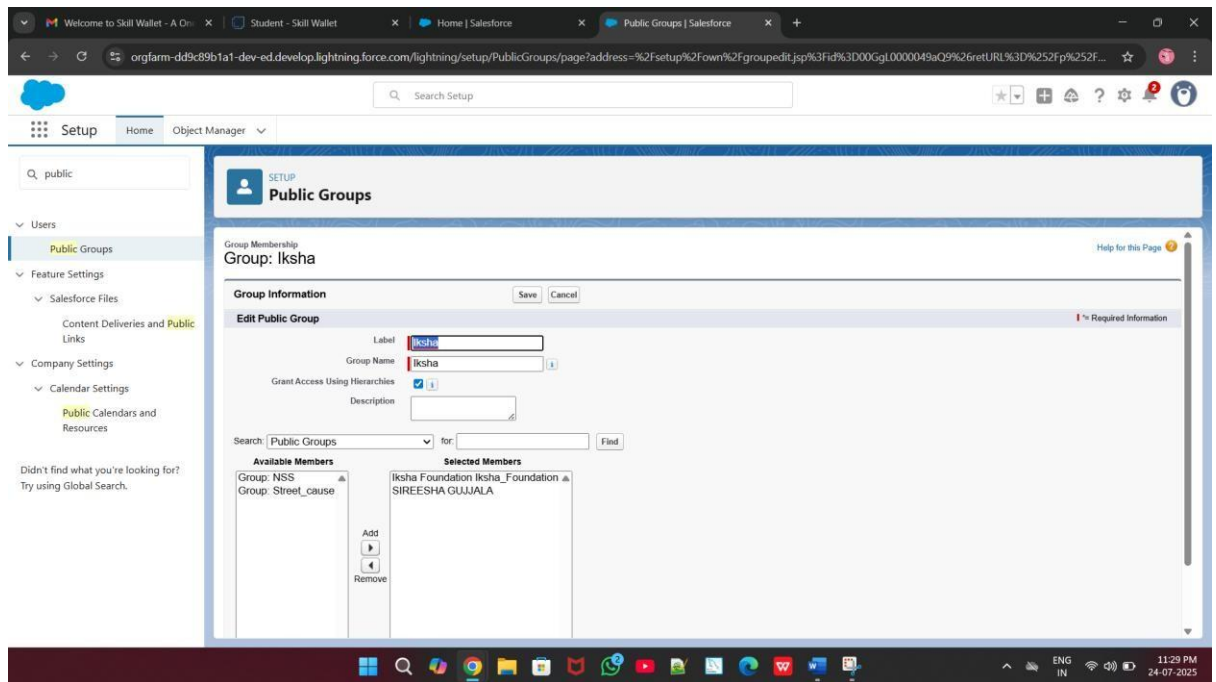
## Creation of User2, User3

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.



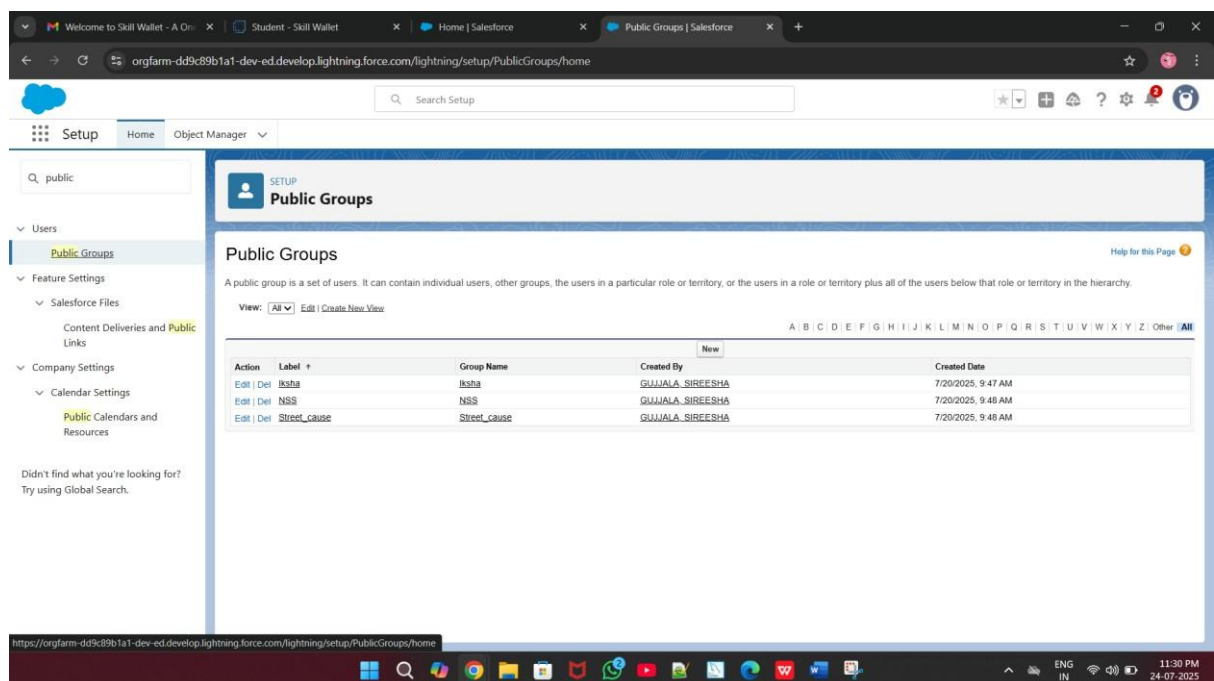
## Public Groups Creation of Public Group 1

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
3. In Search, Select Users.
4. In Selected Members Add Iksha Foundation and System Administrator



## Creation of Public Group 2

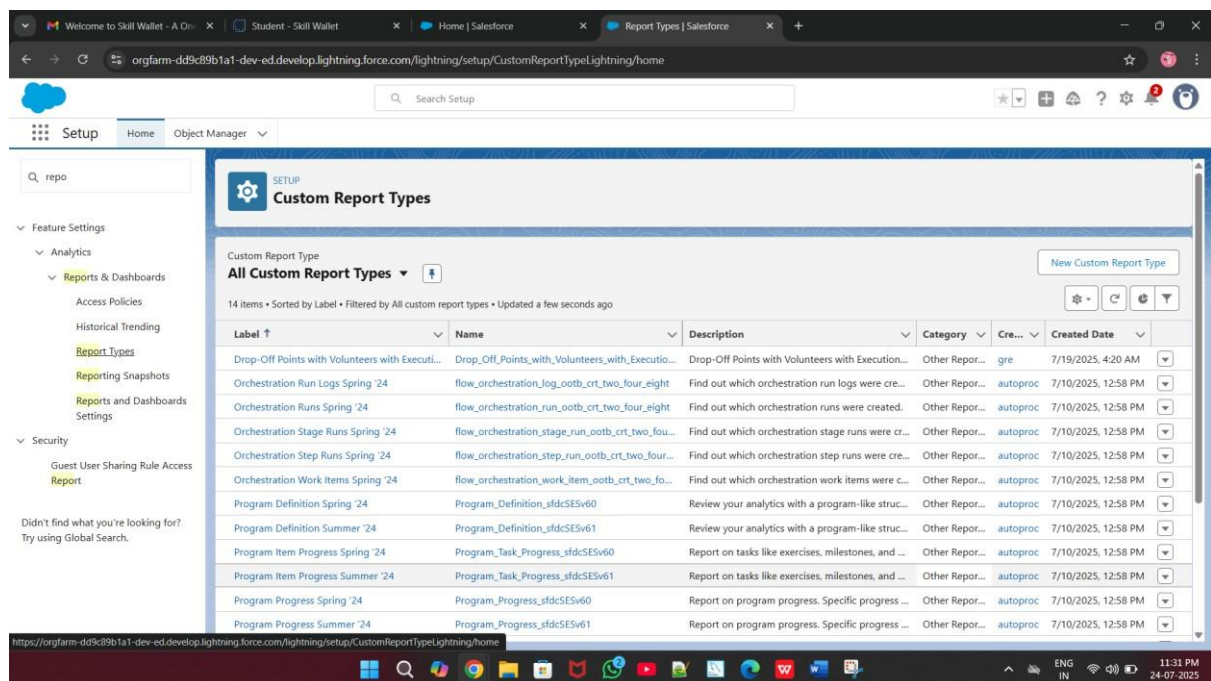
1. By Following Steps in Activity 1, Create other two Public Groups for other two users.
2. After Saving this would look like this.



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



## Reports Creation of Report on Venue with DropOff with Volunteer

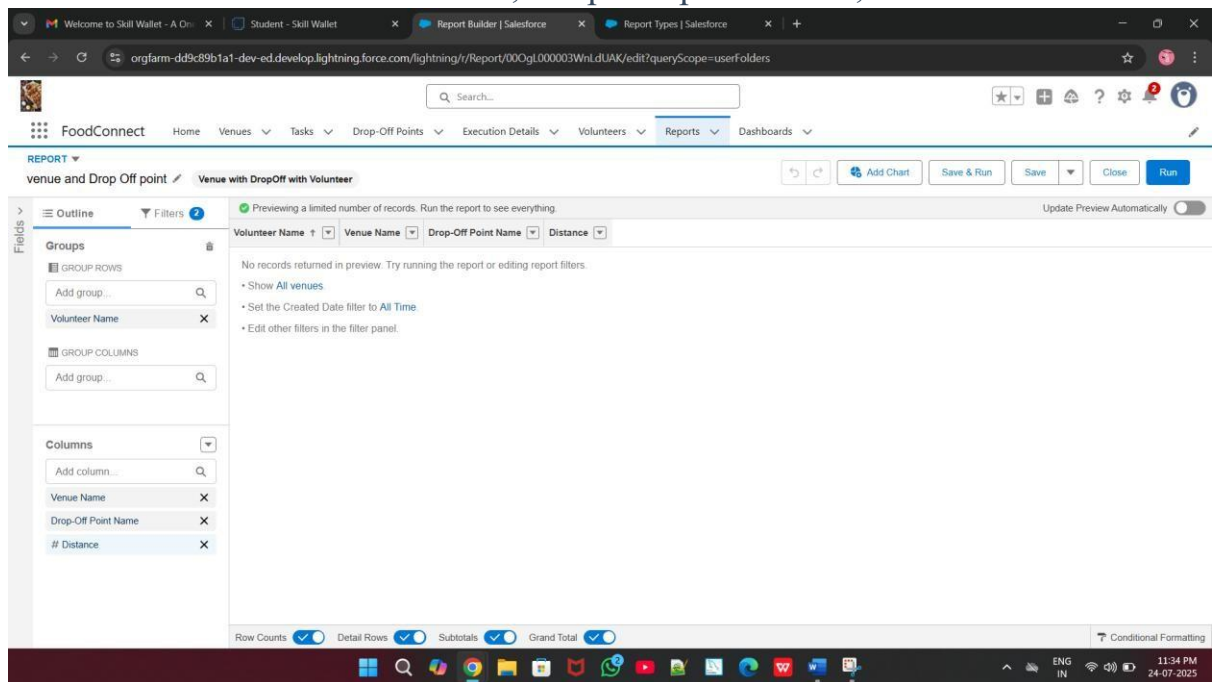
1. Go to the app(FoodConnect) >> click on the reports tab
2. Click on New Folder.



Folder Label : Custom Reports

Folder Unique Name : CustomReports

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

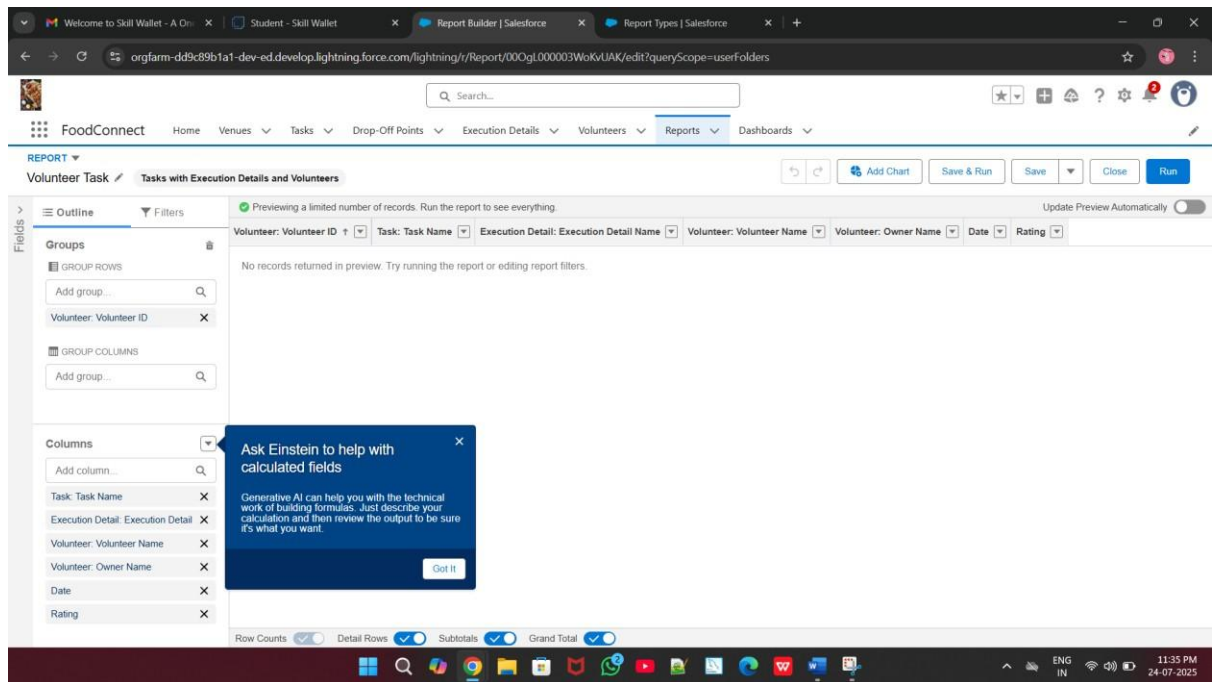


8. Now click on Save & Run.
9. Give Label as :
10. Report Name : venue and Drop Off point
11. Report Unique Name : Auto Populated
12. Click on Select Folder and select Custom Report, then click on Save.

### 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.





7. Now click on Save & Run.

8. 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.

## 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

3. Open Custom Dashboards and click on New Dashboards

4. Name : Organization Details

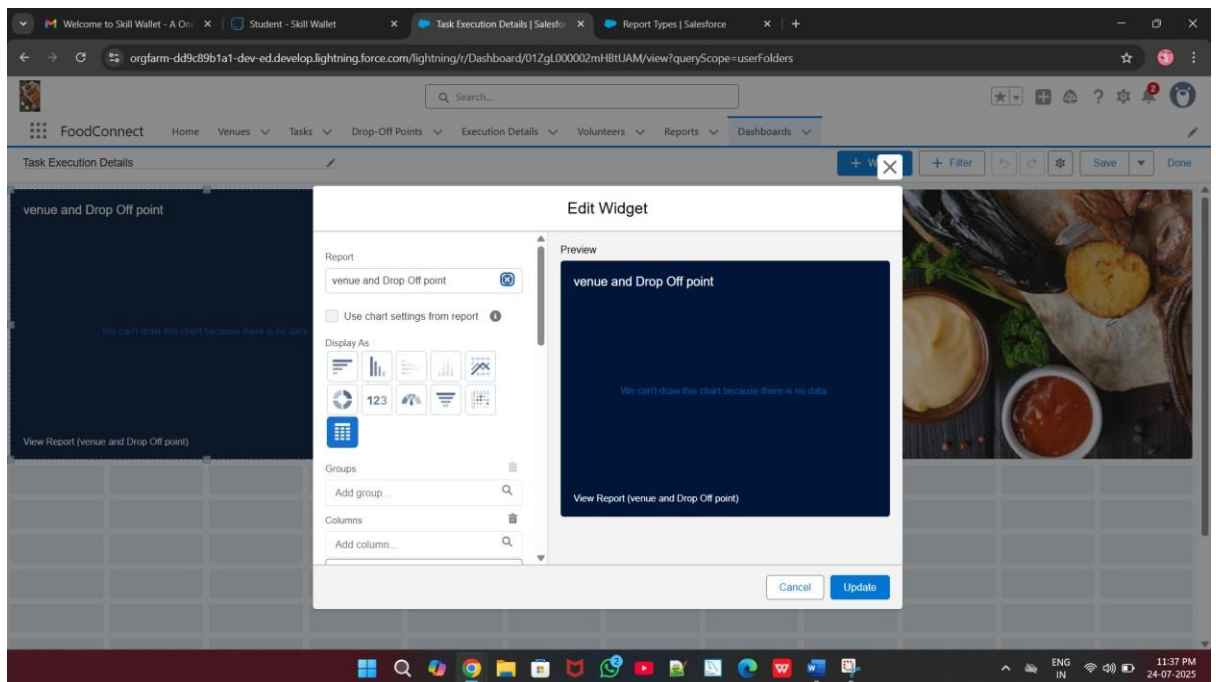
5. Click on Widget and select Chart or Table

6. In Select Report : Select venue and Drop Off point Report. 7. Then click on select 8. In Add Component:

Display As : Select Lightning Table

Component Theme : Select Dark (Optional)

1. Now click on save.

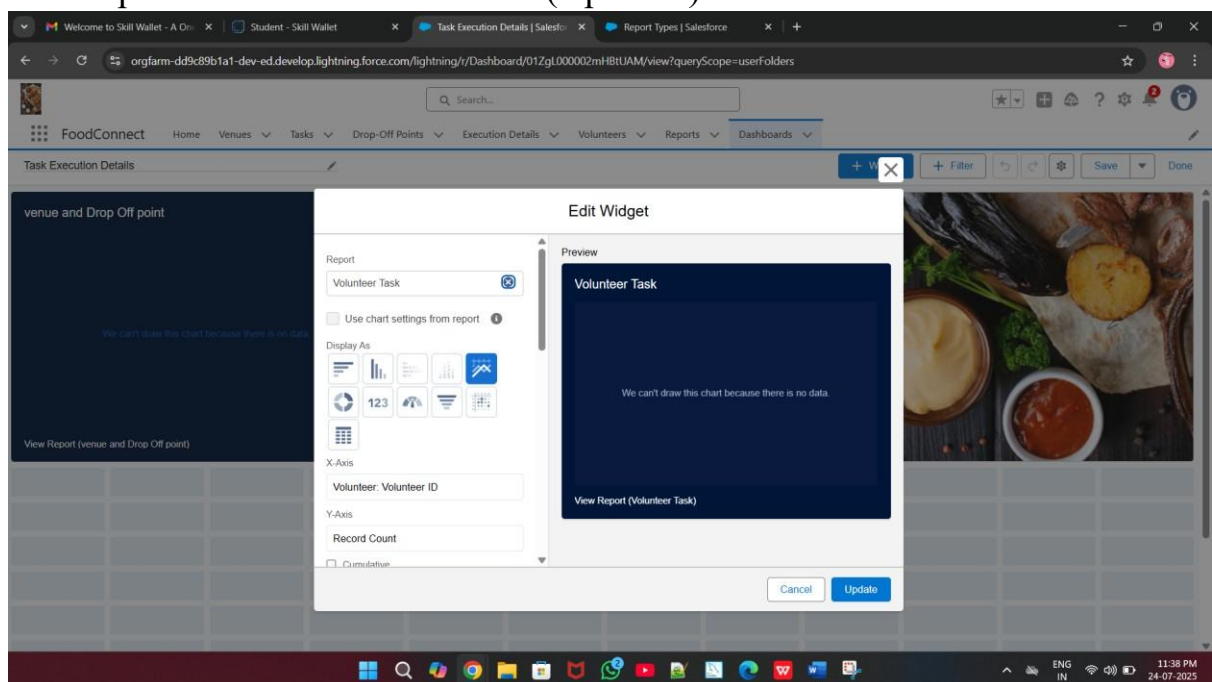


## Adding Volunteer Task Report to the Dashboard

1. Click on Widget and select Chart or Table
2. In Select Report : Select Volunteer Task Report. 3. Then click on select 4. In Add Component:

Display As : Select Line Chart

Component Theme : Select Dark (Optional)



1. Now click on save.

## Adding a Picture to the Dashboard (Optional)

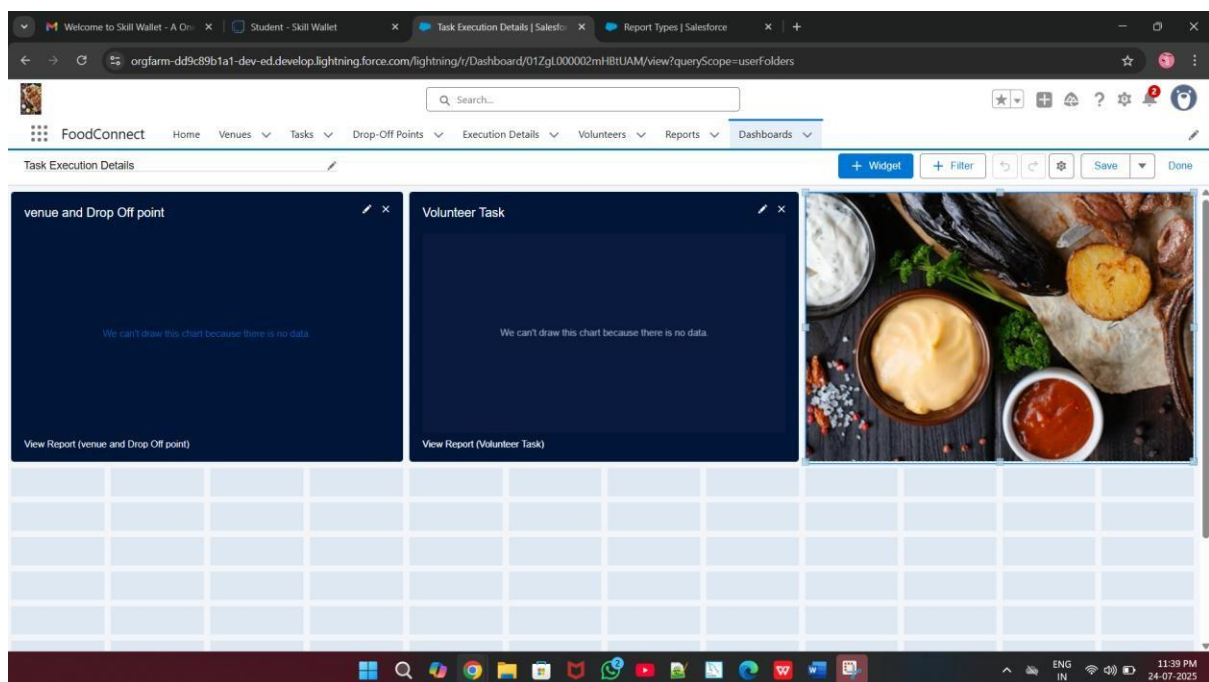
(Note : To upload an image into the Dashboard, we have to first download an image from google or other sources into your system)

1. Click on Widget and select Image. Then click on Browse Files.
2. Then Select the Picture you want to upload in this Dashboard.
3. Then click on Save As :

Name : Task Execution Details

Click on Select Folder and select Custom Dashboards

4. Click on Select Folder and then Save.



## 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.

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

- Work Type Sharing Rules:** No sharing rules specified.
- Work Type Group Sharing Rules:** No sharing rules specified.
- Drop-Off Point Sharing Rules:** This section contains a table with the following data:
 

Action	Criteria	Shared With	Access Level
Edit   Del	Drop-Off Point: Distance LESS THAN 15	Group: Iksha	Read/Write
Edit   Del	(Drop-Off Point: Distance GREATER THAN 15) AND (Drop-Off Point: Distance LESS OR EQUAL 30)	Group: NSS	Read/Write
Edit   Del	(Drop-Off Point: Distance GREATER THAN 30) AND (Drop-Off Point: Distance LESS OR EQUAL 50)	Group: Street_cause	Read/Write
- Placement Sharing Rules:** No sharing rules specified.
- Task Sharing Rules:** No sharing rules specified.
- Venue Sharing Rules:** No sharing rules specified.

The bottom of the screen shows the Windows taskbar with various application icons and the system clock indicating 11:41 PM on 24-07-2025.

## Creation of Home Page

Go to setup >> type Lightning App Builder in quick find box >> Click on the Lightning App Builder and Select the New.

Select Home Page and give Label as HOME Page.

Select Standard Home Page.

Near Components search for Flow and Drag and Drop in Right Side Section..

On the right hand side:

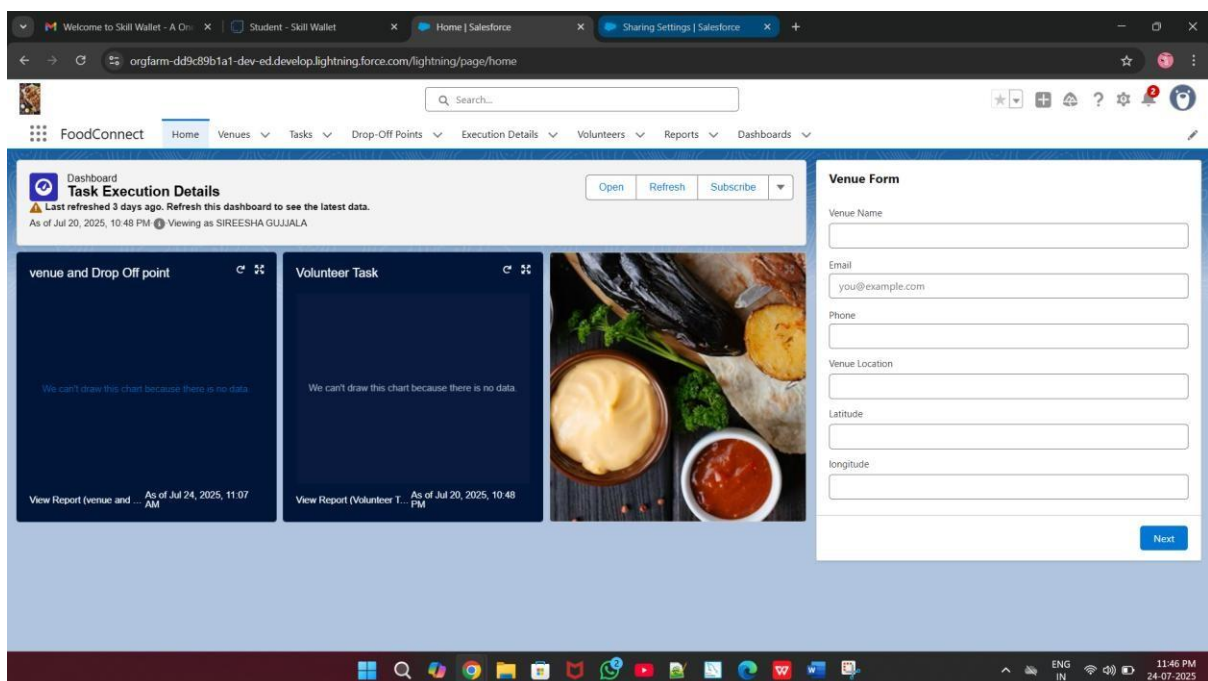
Flow : Venue Flow

Near Components search for Dashboard, then Drag and Drop it in first Section.

Click on Save and Activation, then click on App Default, then Add Assignments.

Add FoodConnect App and then Save.

FoodConnect Home Page would Look Like this.



## Issue Resolution Strategy

To maintain smooth system operations, a structured troubleshooting strategy is in place to address frequent challenges like missed pickups, alert failures, or inconsistencies in data. Technical teams utilize debug logs to pinpoint issues within Apex triggers or automated workflows. Additionally, detailed CRM documentation provides insights into object relationships, business logic, and system error messages, enabling quicker root cause analysis. This proactive approach minimizes service disruptions and ensures that the mission of delivering surplus food promptly to those in need remains uninterrupted.

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## CONCLUSION

The FOODCONNECT initiative demonstrates the impactful use of Salesforce CRM to create a reliable and efficient network that connects food donors with underserved communities. Through automation of key processes—including food collection, route planning, and distribution—the platform significantly reduces the need for manual coordination, curbs food waste, and guarantees timely service delivery.

With features like real-time dashboards and automated messaging, the system also fosters greater transparency and strengthens donor relationships. Its flexible design allows for effortless scaling, making it easy to expand participation from donors, NGOs, and volunteers alike.

Future enhancements, such as integrating artificial intelligence for demand prediction or deploying chatbots for donor assistance, present exciting opportunities to further optimize operations. These innovations will continue to advance FOODCONNECT's mission of reducing hunger and supporting communities in need.