Project Title: Blood Donor Management System

Problem Statement

Blood donation and availability are often managed manually through registers and phone calls.

- Lack of centralized system leads to delays in finding compatible donors during emergencies.
- · Miscommunication between hospitals, blood banks, and donors results in shortages.
- Difficulty in maintaining donor history, eligibility, and tracking regular donors.
- Emergency blood requests are not communicated effectively to potential donors.
- No proper reporting system to analyze donation trends and shortages.

Project Overview

- A centralized, automated platform for managing donors, blood inventory, and requests.
- Real-time donor matching based on blood group and location.
- Hospitals and blood banks can raise urgent blood requests and notify eligible donors instantly.
- Dashboards and reports for monitoring donor activity, blood availability, and hospital demand.
- Secure storage of donor and patient data with privacy compliance.

Objective

- · Digitize donor registration, hospital requests, and blood availability tracking.
- Provide dashboards for hospitals, blood banks, and administrators to monitor real-time data.
- Allow donors to view their donation history, eligibility, and receive alerts.
- Generate real-time alerts for urgent requests and donor reminders.
- Ensure data accuracy, privacy, and security at all levels.

Use Cases

- Donor Registration & Management: Donors register, update health status, and check eligibility for donation.
- Blood Inventory Management: Hospitals and blood banks update available blood units with expiry

tracking.

- Blood Request & Allocation: Hospitals raise requests; system matches with nearest eligible donors.
- Notifications & Alerts: Donors get alerts for urgent requests, upcoming eligibility, and reminders.

Phase 1: Problem Understanding & Industry Analysis

Requirement Gathering

Collect requirements from hospitals, donors, patients, and blood banks.

Identify key pain points: manual processes, delays in finding donors, miscommunication, lack of real-time updates.

Document system requirements: donor registration, blood request, alerts, inventory tracking, and reporting.

Stakeholder Analysis

Donors: Register, update health status, track donation history, and receive alerts.

Hospitals: Request blood urgently and manage inventory efficiently.

Blood Banks: Update stock, manage expiry dates, and ensure timely donor-hospital matches

Healthcare Administrators: Monitor availability, donor activity, and compliance with standards.

Patients: Benefit indirectly from faster donor matching and emergency response.

Business Process Mapping

Current Process: Manual donor identification via phone calls or registers.

Challenges: Slow emergency response, no centralized donor history, limited reporting.

Future Process: Centralized donor database, automated matching, dashboards for hospitals and admins, real-time donor notifications.

Industry-Specific Use Case Analysis

Donor Management: Digital registration, eligibility monitoring, health checks, and reminders.

Emergency Response: Instant donor matching for hospital requests.

Inventory Tracking: Blood unit expiry monitoring and shortage alerts.

Compliance: Ensure privacy, security, and adherence to government guidelines for blood donation.

AppExchange Exploration

Explore existing healthcare and blood bank management apps for Salesforce.

Identify reusable components such as donor/volunteer management, healthcare CRMs, and alert systems.

Evaluate whether customization or integration of existing apps provides better efficiency.

Phase 2: Org Setup & Configuration

Step 1. Salesforce Editions

- Using Salesforce Developer Edition Org.
- Developer Edition provides Enterprise-level features free with limited licenses and storage.
 - Suitable for student projects and practice

Step 2. Company Profile Setup

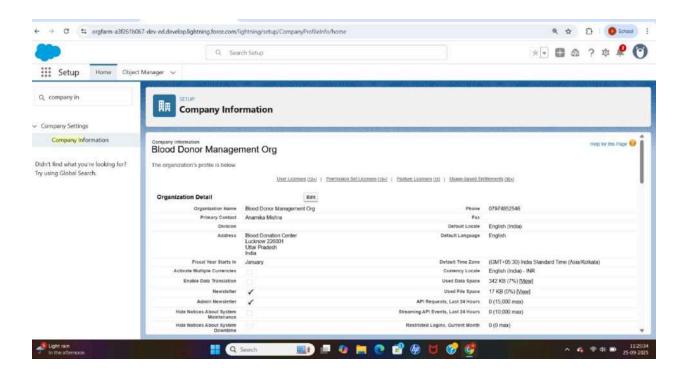
Organization Name: Blood Donor Management Org

Default Locale: English (India)

Default Language: English

Default Time Zone: (GMT +05:30) India Standard Time (Asia/Kolkata)

Default Currency: INR (Indian Rupee)



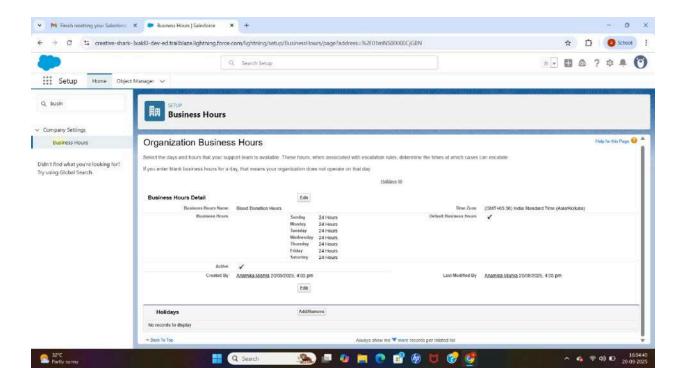
Step 3. Business Hours

Name: Blood Donation Hours

Time Zone: GMT +05:30 India Standard Time

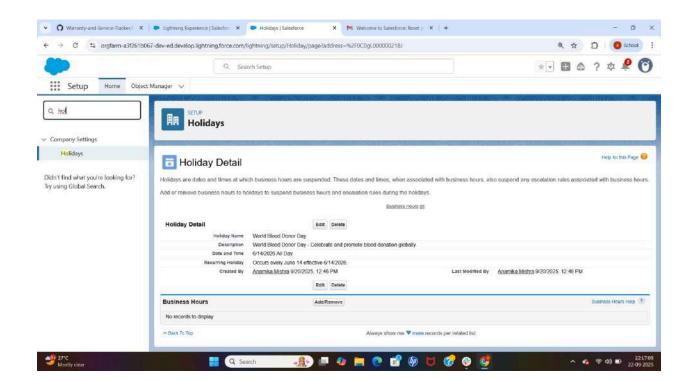
Start: 9:00 AM

End: 6:00 PM



Holiday Name: World Blood Donor Day

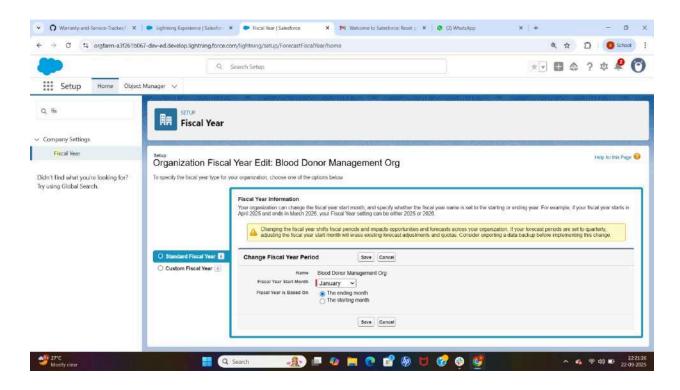
Date: 6/14/2026 (All Day)



Step 4. Fiscal Year Settings

Fiscal Year: Standard (January-December).

Custom Fiscal Year not enabled (not needed for this project).



Step 5. User Setup & Licenses

Created 2 Test Users

User 1:

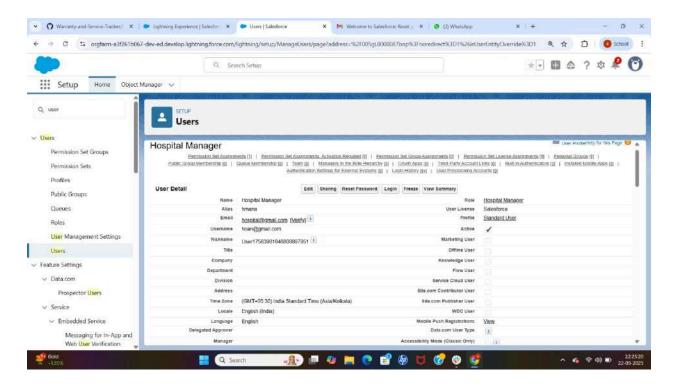
First Name: Hospital

Last Name: Manager

Role: Hospital Manager

User License: Salesforce

Profile: Standard User



User 2:

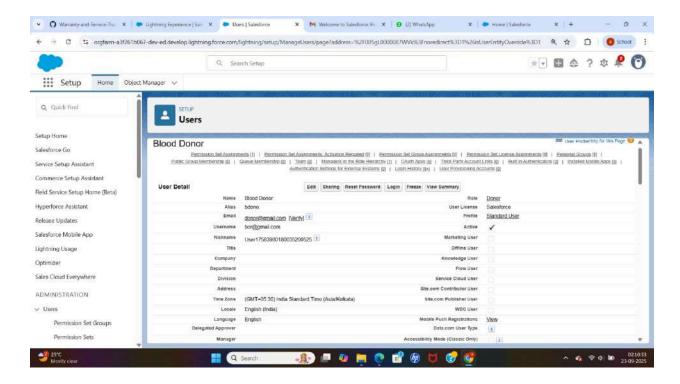
First Name: Blood

Last Name: Donor

Role: Donor

User License: Salesforce

Profile: Standard User

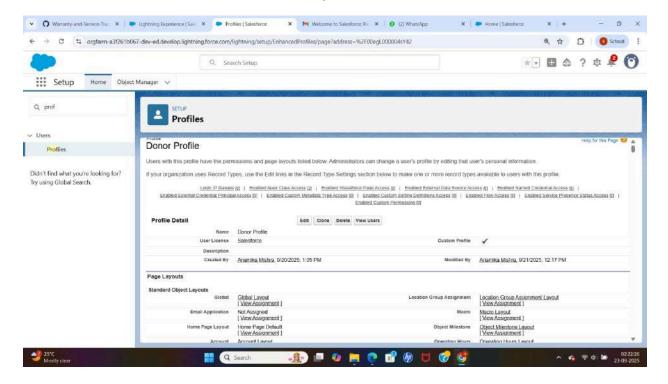


Step 6. Profiles

- 1. Go to Setup \rightarrow Profiles.
- 2. Clone a profile:

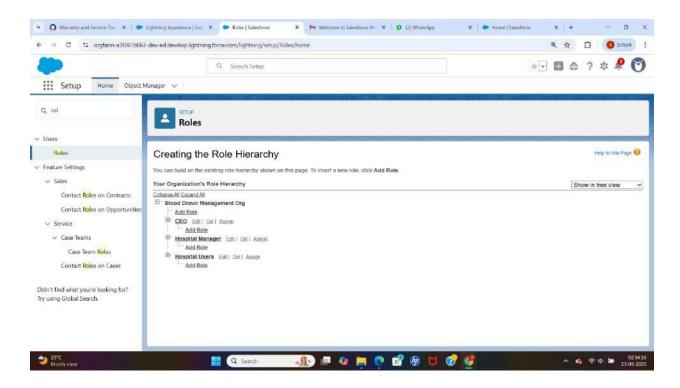
Name: Donor Profile

Permission: Donor_c → Read/Edit



Step 7. Roles

Role hierarchy created Blood Donor Management Org (top) Hospital Manager

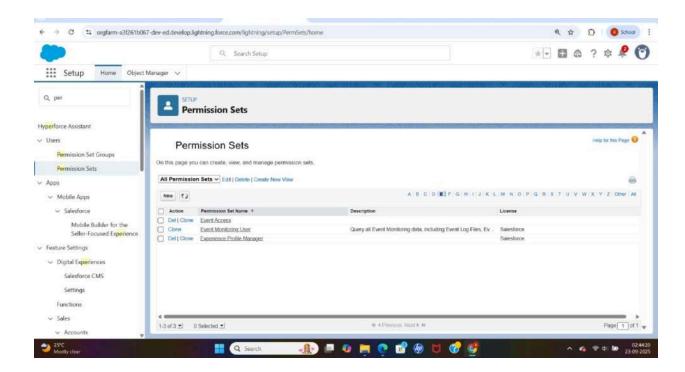


Step 8. Permission sets

Name: Event Access

Object Settings: Donation_Event $_c \rightarrow \text{Read/Write}$ (enabled)

Assign this permission set to Hospital User



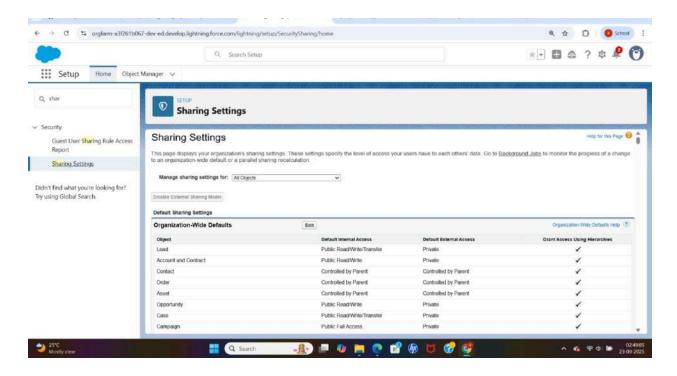
Step 9. OWD (Organization-Wide Defaults)

- 1. Go to Setup → Sharing Settings.
- 2. Set object access:

Donor__c → Private

 $Donation_Request_c \rightarrow Public Read-Only$

Donation_Event__c → Public Read/Write



Step 10. Sharing Rules

1. Go to Setup → Sharing Settings.

2. For Donor_c, create a new sharing rule:

Name: Share Donors with Hospital Manager

Rule Type: Based on Role

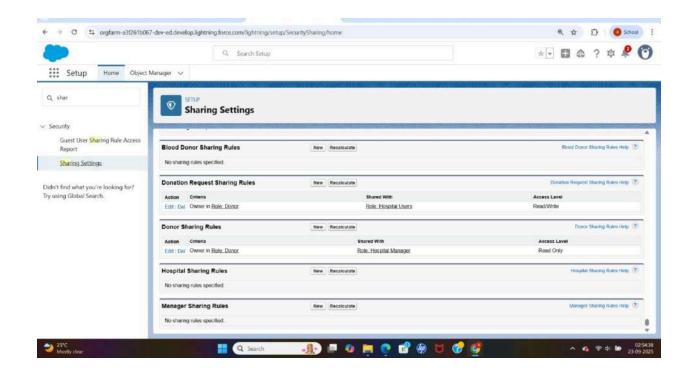
Share with: Hospital Manager

Access: Read Only

3. For Donation_Request__c, create a new sharing rule:

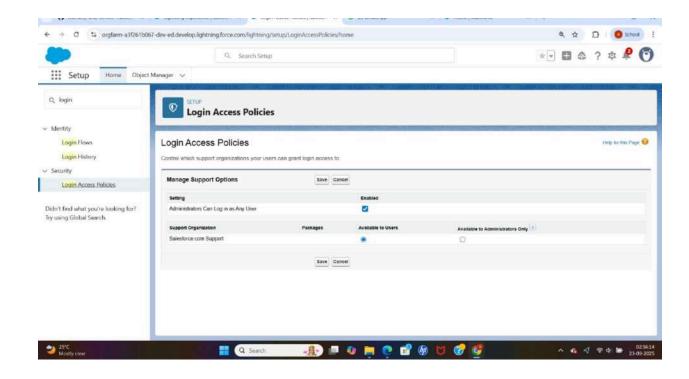
Share with: All Hospital Users

Access: Read/Write



Step 11: Login Access Policies

- 1. Setup Login Access Policies
- 2. Enable: Administrators Can Log in as Any User



Step 12. Developer Org Setup

Project developed in Salesforce Developer Edition Org.

Provides free Enterprise-level features suitable for learning and development purposes.

Step 13. Sandbox Usage

Sandboxes are not available in Developer Edition.

In real-world companies, sandboxes are used for testing, development, and training without affecting Production.

Step 14. Deployment Basics

Deployment methods include Change Sets or Salesforce CLI / VS Code.

Not required here since the project is fully developed and tested within a single Developer Org.

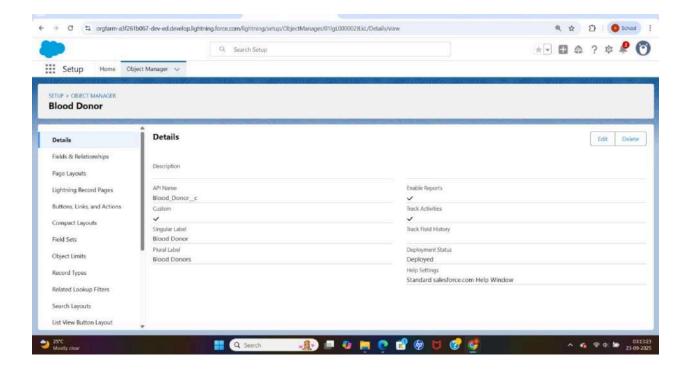
Phase 3: Data Modeling & Relationships

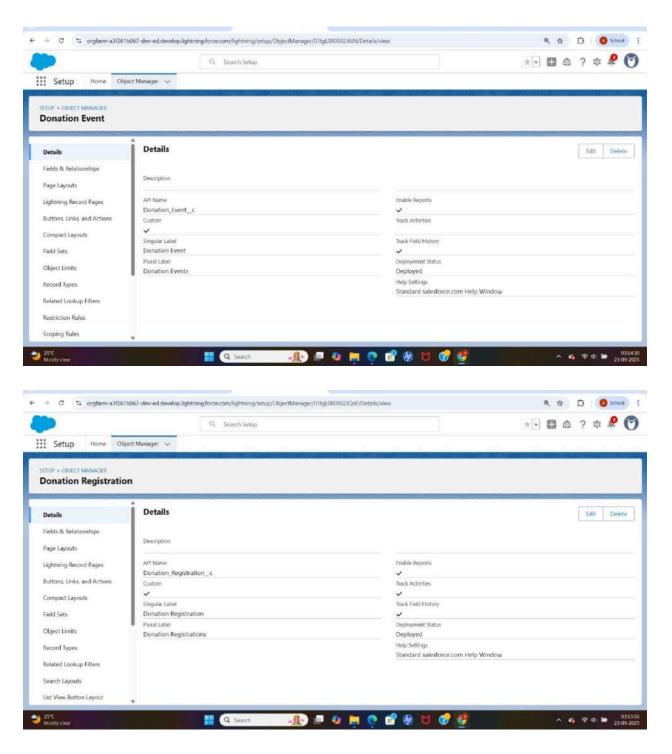
Step 1. Standard & Custom Objects

Go to Setup → Object Manager → Create Custom Object.

Create these objects:

- Blood Donor
- Donation Event
- Donation Registration



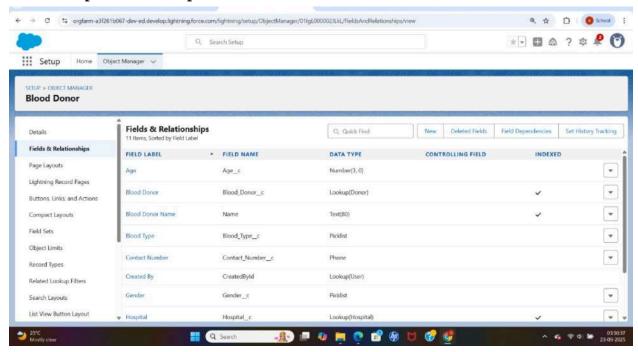


Step 2. Fields

1. Go to Object Manager \rightarrow [Object] \rightarrow Fields & Relationships \rightarrow New.

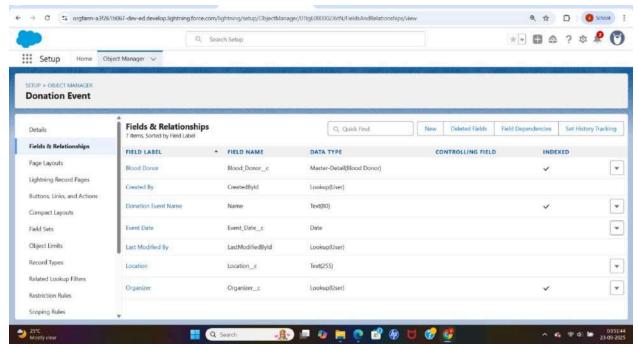
2. Blood Donor fields:

- Blood Type → Picklist
- Age → Number
- Gender → Picklist
- Last Donation Date → Date
- Contact Number → Phone
- Hospital → Lookup

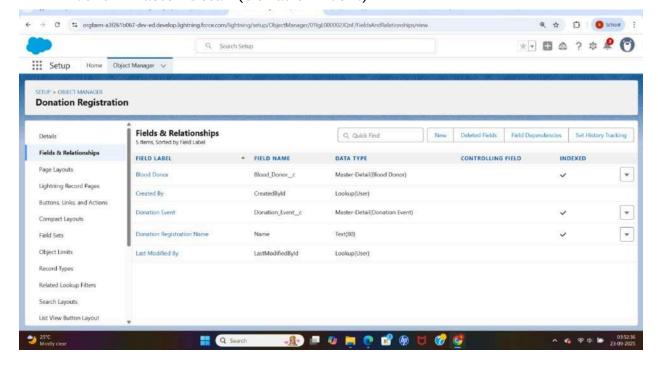


3. Donation Event fields:

- Event Date → Date
- Location → Text.
- Organizer → Lookup



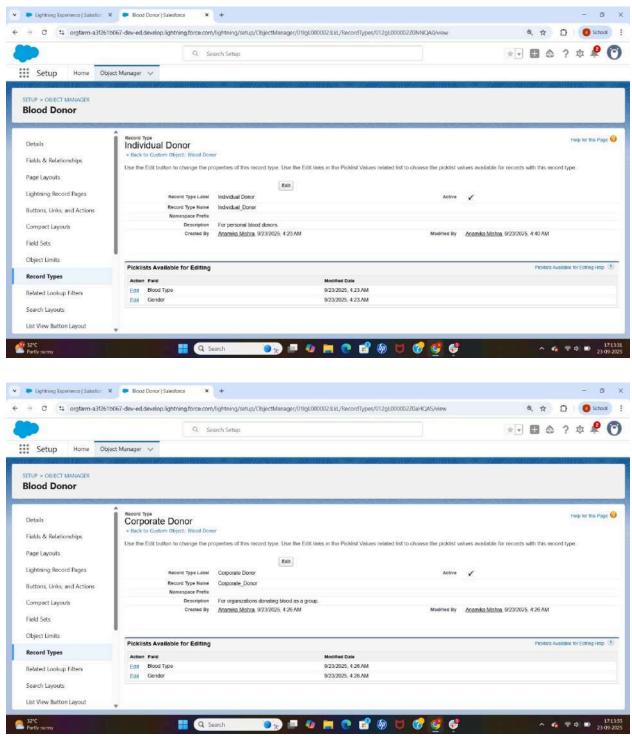
- 4. Donation Registration fields:
 - Donor → Master-Detail (Blood Donor)
 - Event → Master-Detail (Donation Event)



Step 3. Record Types

1. Record Types = different layouts/picklists.

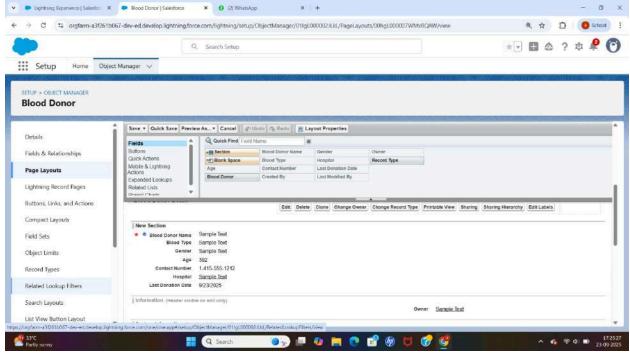
- 2. Blood Donor → Individual & Corporate Donor.
- 3. Setup → Object Manager → Record Types → New.



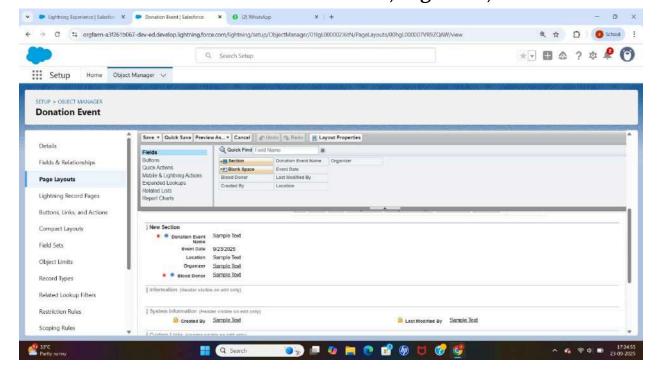
Step 4. Page Layouts

Setup: Object Manager → Object → Page Layouts → New Sections

Blood Donor - Personal Information, Blood Type , Hospital, Last Donation Date



Donation Event - Event Information, Organizer, Location

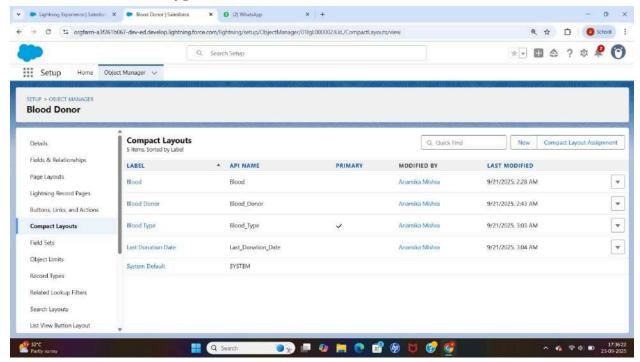


Step 5. Compact Layouts

Setup: Object Manager → [Object] → Compact Layouts → New

Example: Blood Donor Last Donation Date

Fields: Name, Blood Type

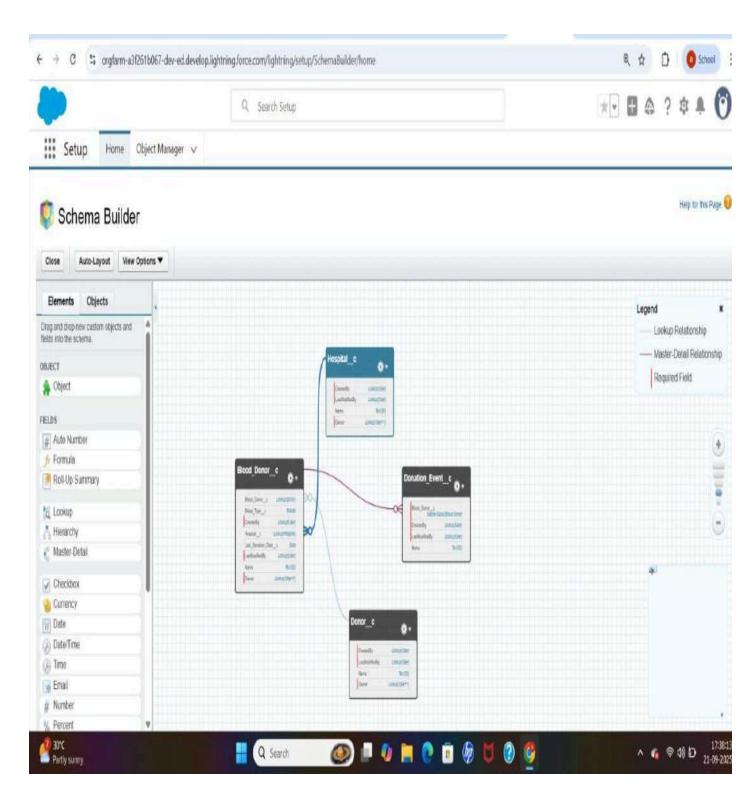


Step 6. Schema Builder

Go to Setup → Schema Builder.

Drag objects onto canvas.

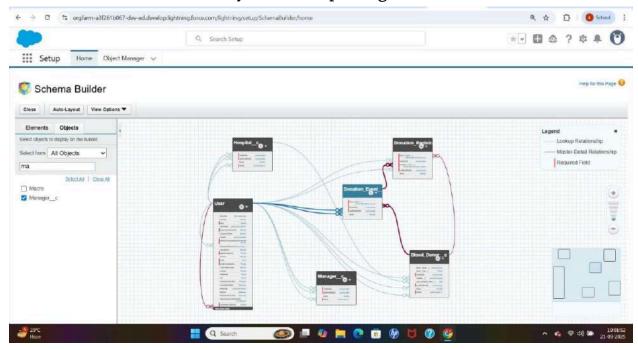
Create Master-Detail and Lookup relationships visually.



Step 7. Lookup vs Master-Detail vs Hierarchical Relationships

• Relationship Type - Lookup

- Example Blood Donor Hospital
- Reason for Choice Donor can exist independently
- Relationship Type Master-Detail
- Example Donation Registration Donor
- Reason for Choice Strong dependency
- Relationship Type Master-Detail
- Example Donation Registration Event
- Reason for Choice Strong dependency
- Relationship Type Hierarchical
- Example User Manager
- Reason for Choice Only for User reporting



Step 8. Junction Objects

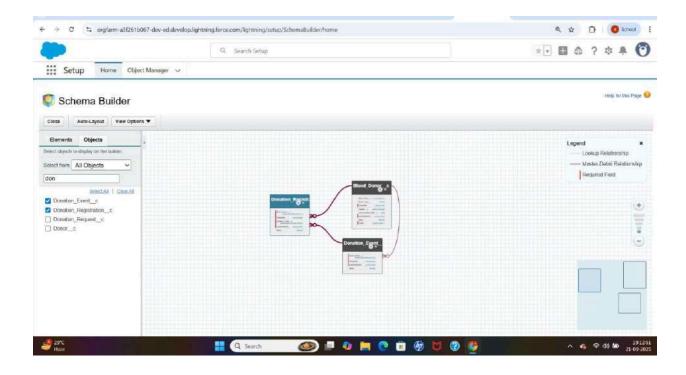
Used for many-to-many relationships

Donor - Donation Event

Junction Object - Donation Registration

Master-Detail to Blood Donor

Master-Detail to Donation Event

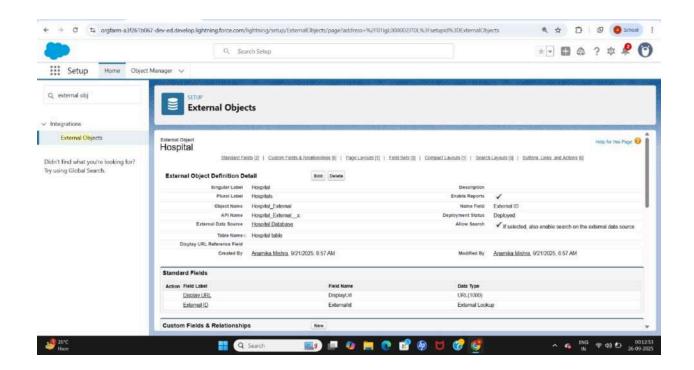


Step 9. External Objects

Use to access data from external systems without importing it into Salesforce.

Example: Connect to a hospital database outside Salesforce.

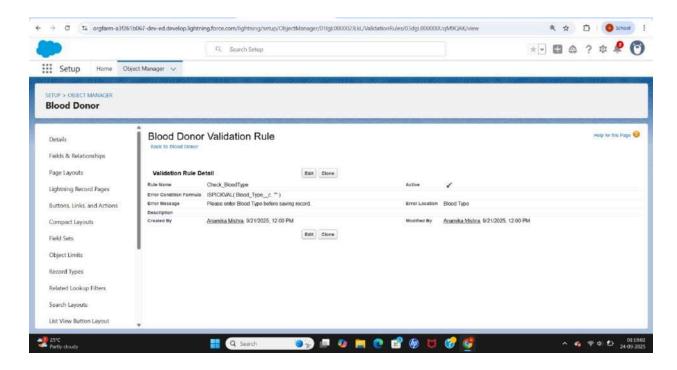
Setup: Setup \rightarrow External Objects \rightarrow Create \rightarrow Connect using Salesforce Connect.



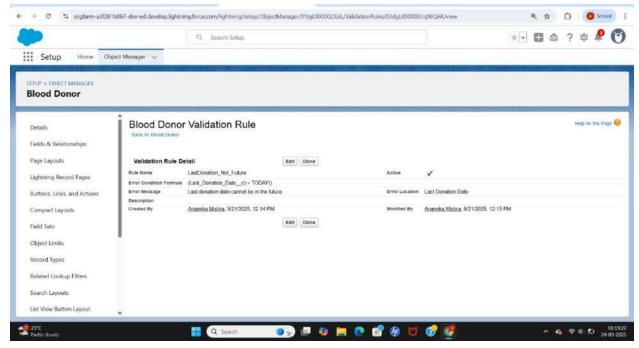
Phase 4: Process Automation (Admin)

Step 1. Validation Rules

- Rule Name: Check_BloodType
- Formula: ISPICKVAL(Blood_Type_c, "")
- Error Message: "Please enter Blood Type before saving."
- Error Location: Field → Blood Type



- Rule Name: LastDonation_Not_Future
- Formula: Last_Donation_Date_c > TODAY()
- Error Message: Last donation date cannot be in the future.
- Error Location: Field → Last Donation Date



Step 2. Workflow Rules

Rule Name: Donor_Reminder_90days

Evaluation: Created, and edited to meet criteria

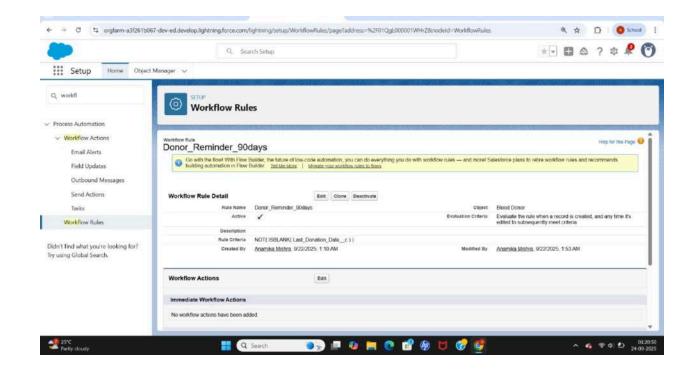
Criteria (Formula): NOT(ISBLANK(Last_Donation_Date_c))

Time Trigger: 90 days after Last_Donation_Date__c

Action: Email Alert → Template: Donor_Reminder_Template

Subject: Time for Your Next Blood Donation

Recipient: Donor Email (Email_c)



Step 3. Process Builder

1. Create Process

Name: Update Donor Last Donation Date

Starts: When a record changes

2. Select Object

Object: Donation Registration

Start when: Record is created or edited

3. Define Criteria

Name: Donation Completed

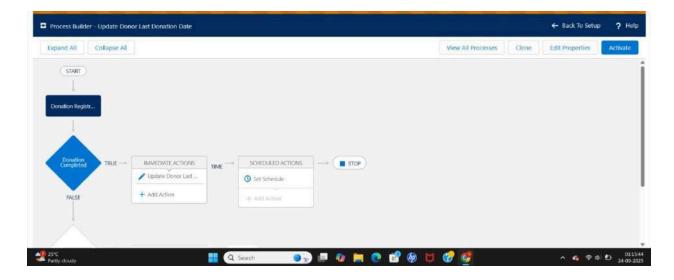
Condition: Donation Status = Completed

Execute only when specified changes are made: Yes

4. Define Action

Action Type: Update Records Update: Related Donor record

Field: Last Donation Date = Donation Registration.Donation Date



Step 4. Approval Process

Donation Request Approval Process

1. Setup: Approval Processes → Donation_Request__c → Jump Start Wizard.

2. Name & Entry: Donation Request Approval; records with Status_c = "Pending Approval".

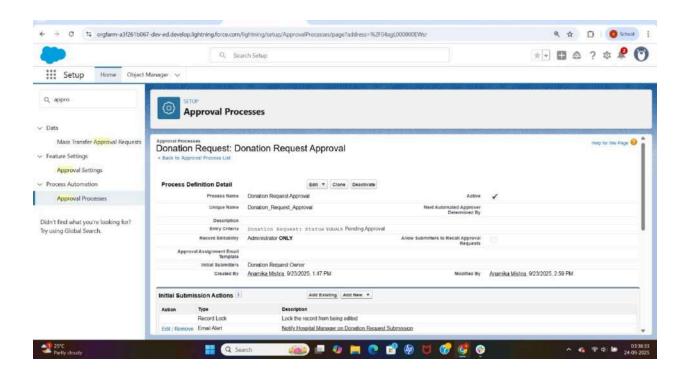
3. Approver: Hospital Manager.

4. Actions:

On submit: Lock record

If approved: Status → Approved, notify owner If rejected: Status → Rejected, notify requester

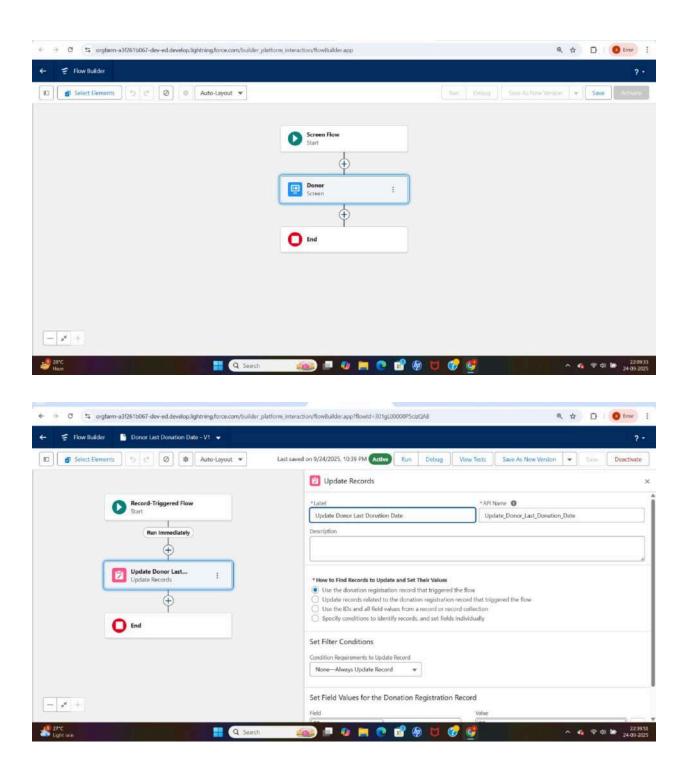
5. Activate: Process ready for use.

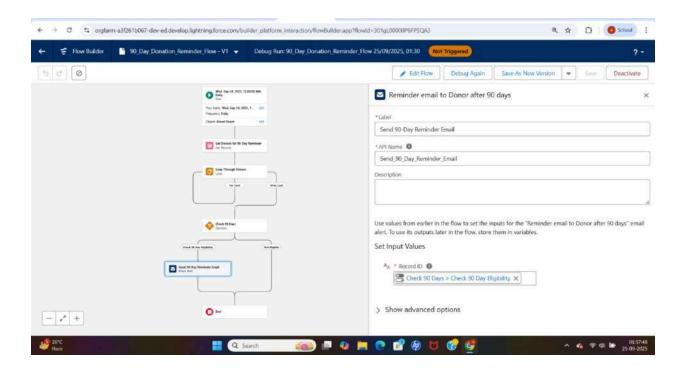


Step 5. Flow Builder (Screen, Record-Triggered, Scheduled, Auto-Launched)

Use Cases in Blood Donor Management

- 1. Screen Flow: Register a new donor (collect name, age, blood group, contact info).
- 2. Record-Triggered Flow: Update donor's Last Donation Date whenever a donation record is added.
- 3. Scheduled Flow: Send reminder emails after 90 days of last donation.
- 4. Auto-Launched Flow: Assign donors to nearest hospital automatically.





Step 6. Email Alerts

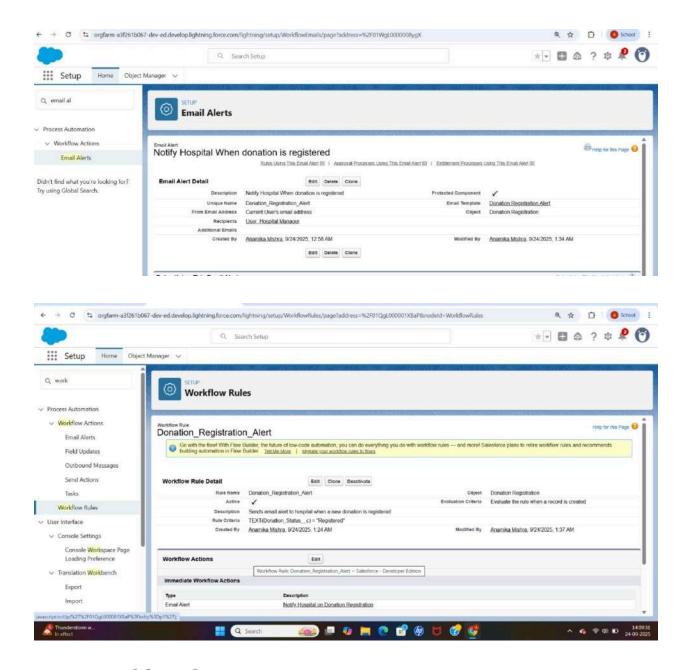
1. Setup → Email Alerts → New Email Alert

Description: Notify hospital when donation is registered

 $Unique\ Name: Donation_Registration_Alert$

Object: Donation Registration

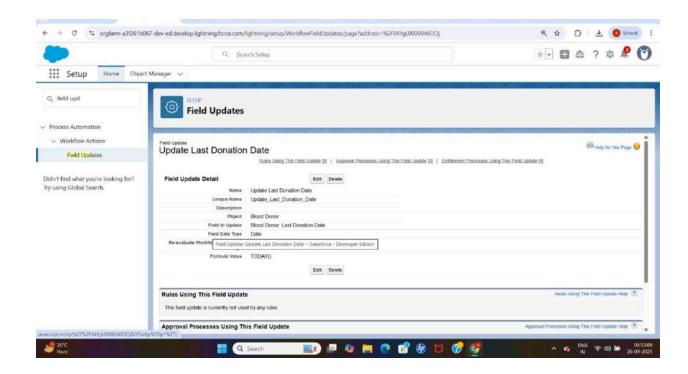
Choose recipients: User



Step 7. Field Updates

Name: Update_Last_Donation_Date

Select the field to update: Choose Last Donation Date on Blood Donor object.

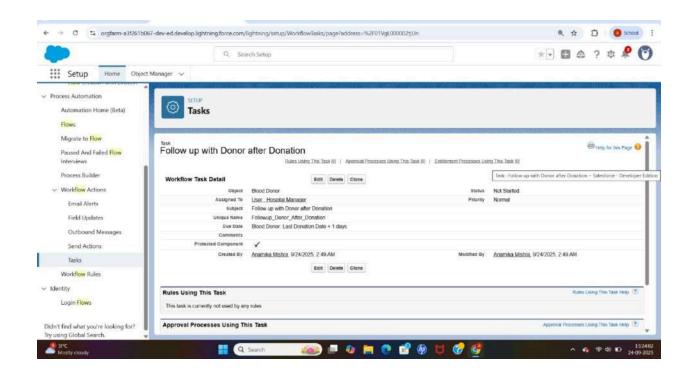


Step 8. Tasks

Object: Blood Donor

Assigned To: Hospital Manager

Subject: Follow up with Donor after Donation



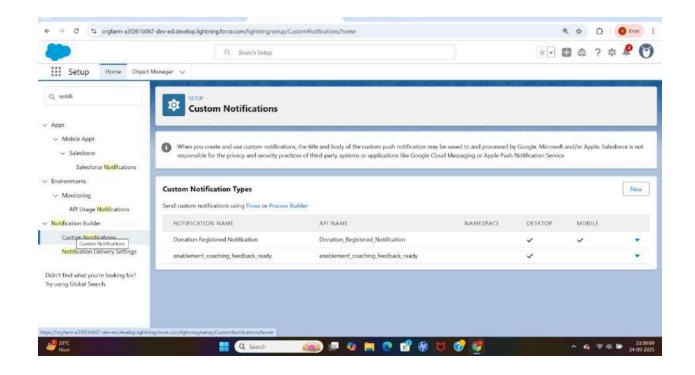
Step 9. Custom Notifications

Name: Donation Registered Notification

Object: Donation Registration

Supported Channels -

- Desktop (for Salesforce users)
- Mobile (for Salesforce Mobile App)



Phase 5: Apex Programming (Developer)

Step 1. Classes & Objects

In Apex, a class is a blueprint that defines variables (data) and methods (functions).

An object is an instance of a class, which represents a real-world entity. In your Blood Donor Management Project, you can use classes to represent Donors, Hospitals, Donations, and Events.

This makes the system more organized, reusable, and scalable.

```
public class Donor
        public String name;
        public String bloodGroup;
       public Date lastDonationDate;
       public Donor(String n, String bg, Date 1dd)
  9
10
11
          bloodGroup = bg;
          lastDonationDate = 1dd;
       public String getDonorInfo()
          return 'Name: ' + name + ', Blood Group: ' + bloodGroup + ', Last Donation: ' + lastDonationDate;
 Logs Tests Checkpoints Query-Editor View State Progress Problems
public class Donor
  public String name;
  public String bloodGroup;
  public Date lastDonationDate;
  public Donor(String n, String bg, Date ldd)
     name = n;
     bloodGroup = bg;
     lastDonationDate = ldd;
   }
  public String getDonorInfo()
     return 'Name: ' + name + ', Blood Group: ' + bloodGroup + ', Last Donation: ' +
lastDonationDate;
   }
}
```

Step 2. Apex Triggers (before/after insert/update/delete)

```
The Tata Ordinary Table Volugions - Pally - Common Variable Value - Pally - Common Variable Value - Problems - Pally - Common Value Value - Problems - Pally - Common Value Value - Problems - Common Value Value - Problems - Common Value Value - Common Value - Common Value - Common Value Value - Common Valu
```

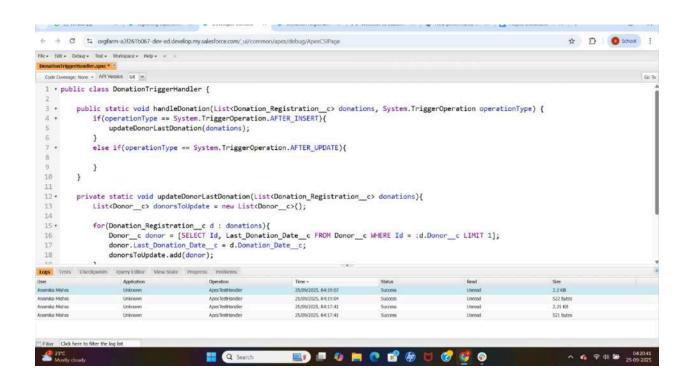
```
trigger DonationRegistrationTrigger on Donation_Registration_c
  (before insert, after insert, after update, before delete)
 if(Trigger.isBefore && Trigger.isInsert)
  {
    // Before Insert Example (set default value)
   for(Donation_Registration_c reg: Trigger.new)
  }
   if(Trigger.isAfter && Trigger.isInsert)
    // After Insert Example (Update Donor's Last Donation Date)
   List<Donor__c> donorsToUpdate = new List<Donor__c>();
   for(Donation_Registration_c reg: Trigger.new)
   {
      Donor_c donor = [SELECT Id, Last_Donation_Date_c
              FROM Donor c
              WHERE Id = :reg.Donor_c LIMIT 1];
     donor.Last_Donation_Date__c = reg.Donation_Date__c;
      donorsToUpdate.add(donor);
```

```
if(!donorsToUpdate.isEmpty())
     update donorsToUpdate;
 }
 if(Trigger.isAfter && Trigger.isUpdate)
   // After Update Example
   for(Donation_Registration__c reg : Trigger.new)
     System.debug('Donation record updated: ' + reg.Id);
  }
 if(Trigger.isBefore && Trigger.isDelete)
  {
   // Before Delete Example
   List<Donor__c> donorsToUpdate = new List<Donor__c>();
   for(Donation_Registration__c reg : Trigger.old)
   {
   if(!donorsToUpdate.isEmpty())
     update donorsToUpdate;
 }
}
```

Step 3. Trigger Design Pattern

```
public class DonationTriggerHandler {
  public static void handleDonation(List<Donation_Registration_c> donations,
  System.TriggerOperation operationType) {
    if(operationType == System.TriggerOperation.AFTER_INSERT){
      updateDonorLastDonation(donations)}
```

```
else if(operationType == System.TriggerOperation.AFTER_UPDATE){
      }} private static void
updateDonorLastDonation(List<Donation_Registration_c> donations){
      List<Donor_c> donorsToUpdate = new List<Donor_c>();
      for(Donation_Registration_c d : donations){
            Donor_c donor = [SELECT Id, Last_Donation_Date_c FROM Donor_c
WHERE Id = :d.Donor_c LIMIT 1];
      donor.Last_Donation_Date_c = d.Donation_Date_c;
      donorsToUpdate.add(donor); }
      if(!donorsToUpdate.isEmpty()){
            update donorsToUpdate;
      } }}
```



Step 4. SOQL & SOSL

SOQL: Salesforce Object Query Language → fetch records from Salesforce objects. List<Donor__c> oPositiveDonors = [SELECT Name, Phone__c FROM Donor__c WHERE Blood_Group__c = 'O+'];

SOSL: Salesforce Object Search Language → search text across multiple objects. List<List<SObject>> searchResults = [FIND 'Anamika*' IN ALL FIELDS RETURNING Donor_c(Name, Phone_c)];

Step 5. Collections: List, Set, Map

List: Ordered collection. Set: Unique elements. Map: Key-value pairs.

```
♦ → O S orgfarm-a3f261b067-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
 Flie + Edit + Debug + Test + Workspace + Help + < >
    ode Coverage: None + API Version 64 🕶
   1 * public class CollectionExamples [
           List<String> bloodGroups = new List<String>{'A+', 'B+', '0+'};
Set<String> uniqueGroups = new Set<String>{'A+', 'B+', '0+', '0+'};
Map<Id, Donor_c> donorMap = new Map<Id, Donor_c>{
               [SELECT Id, Name FROM Donor_c]
           );
       }
  ings Tests Checkpaints Query Editor View State Progress Prob
                                    Q Search
                                                      💷 🔎 🕼 📙 🥷 📅 🥳 💆 🧺
                                                                                                                   ^ 6 ♥ 40 D 1431.4
public class CollectionExamples {
   public static void demo(){
      List<String> bloodGroups = new List<String>{'A+', 'B+', 'O+'};
      Set<String> uniqueGroups = new Set<String>{'A+', 'B+', 'O+', 'O+'};
      Map<Id, Donor_c> donorMap = new Map<Id, Donor_c>(
          [SELECT Id, Name FROM Donor_c]
      );
   }
}
```

Step 6. Control Statements

Send SMS only if donor hasn't donated in 3 months.

```
Code Coverage: None - API Version: 64 w
    public class ControlExample
        public static void notifyDonors(List<Donor_c> donors)
             if(donor.Last_Donation_Date__c <= Date.today().addMonths(-3))
                System.debug('Notify ' + donor.Name);
public class ControlExample {
  public static void notifyDonors(List<Donor_c> donors){
     for(Donor__c donor : donors){
       if(donor.Last_Donation_Date__c <= Date.today().addMonths(-3)){
          System.debug('Notify ' + donor.Name);
        }
  }
}
```

Step 7. Batch Apex

Update all donors' last donation date based on donation records

global class UpdateDonorBatch implements Database.Batchable<SObject>{ global Database.QueryLocator start(Database.BatchableContext BC){

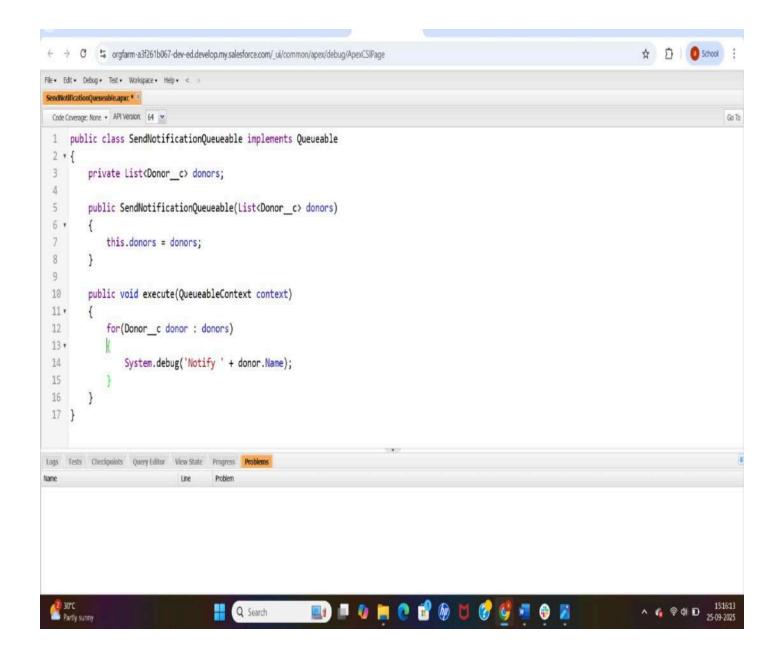
```
return Database.getQueryLocator('SELECT Id, Last_Donation_Date__c FROM
Donor__c'); }
  global void execute(Database.BatchableContext BC, List<Donor__c> scope){
    for(Donor__c donor : scope){ }
     update scope;}
  global void finish(Database.BatchableContext BC){}}
```



Step 8. Queueable Apex

Send notifications to donors after donation recorded.

```
public class SendNotificationQueueable implements Queueable {
   private List<Donor__c> donors;
   public SendNotificationQueueable(List<Donor__c> donors){
      this.donors = donors; }
   public void execute(QueueableContext context){
      for(Donor__c donor : donors){
            System.debug('Notify' + donor.Name); }}}
```



Step 9. Scheduled Apex

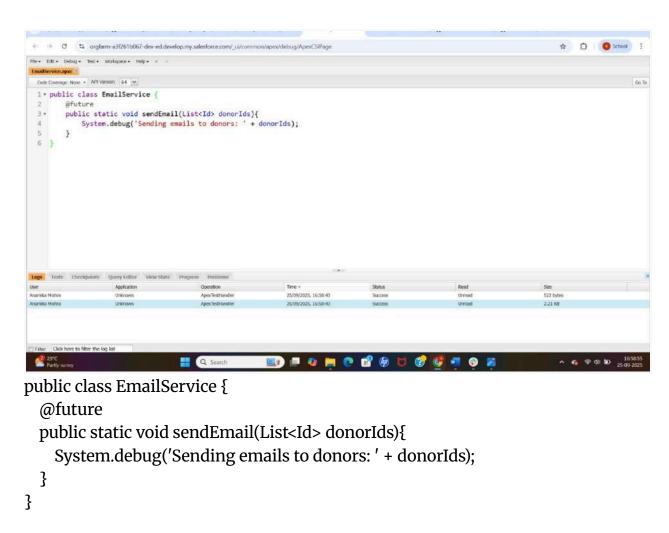
Notify Donors weekly Class Name: weeklyNotification

```
global class WeeklyNotification implements Schedulable{
   global void execute(SchedulableContext sc) {
    List<Donor_c> donors = [SELECT Id, Name FROM Donor_c
```

WHERE Last_Donation_Date__c <= :Date.today().addMonths(-3)]; }}</pre>

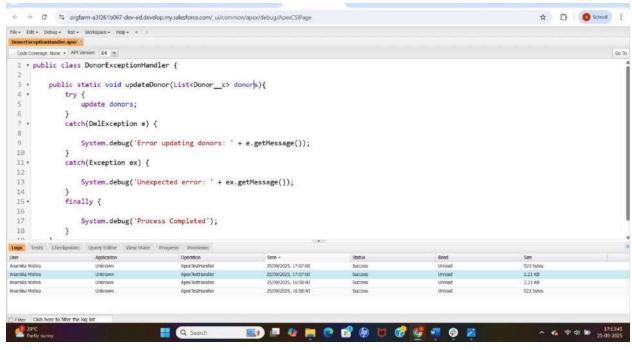
Step 10. Future Methods

Class Name: EmailService



Step 11. Exception Handling

Class Name: DonorExceptionHandler



public class DonorExceptionHandler {

```
public static void updateDonor(List<Donor_c> donors){
    try {
        update donors;
    }
    catch(DmlException e) {

        System.debug('Error updating donors: ' + e.getMessage());
    }
    catch(Exception ex) {

        System.debug('Unexpected error: ' + ex.getMessage());
    }
    finally {

        System.debug('Process Completed');
    }
}
```

Step 12. Asynchronous Processing

}

Class Name - AsyncDemo

}

```
Code Coverage: Nove + API Version: 64 w
  1 • public class AsyncDemo {
       public static void runAllAsync(){
          Database.executeBatch(new UpdateDonorBatch(), 200);
          // 2. Schedule Job
          String cronExp = '0 0 12 * * ?'; // Every day at 12 PM
         System.schedule('Daily Notification Job', cronExp, new WeeklyNotification());
         // 3. Call Future Method
         List<Id> donorIds = new List<Id>();
for(Donor_c d : [SELECT Id FROM Donor_c LIMIT 5]){
             donorIds.add(d.Id);
          EmailService.sendEmail(donorIds);
                                          💷) 🕮 🐠 📙 🥲 💕 🤣 🐯 🤻 🔞 🔀
public class AsyncDemo {
  public static void runAllAsync(){
     // 1. Run Batch Apex
     Database.executeBatch(new UpdateDonorBatch(), 200);
     // 2. Schedule Job
     String cronExp = '0 0 12 * * ?'; // Every day at 12 PM
     System.schedule('Daily Notification Job', cronExp, new WeeklyNotification());
     // 3. Call Future Method
     List<Id> donorIds = new List<Id>();
     for(Donor_c d : [SELECT Id FROM Donor_c LIMIT 5]){
        donorIds.add(d.Id);
     EmailService.sendEmail(donorIds);
```

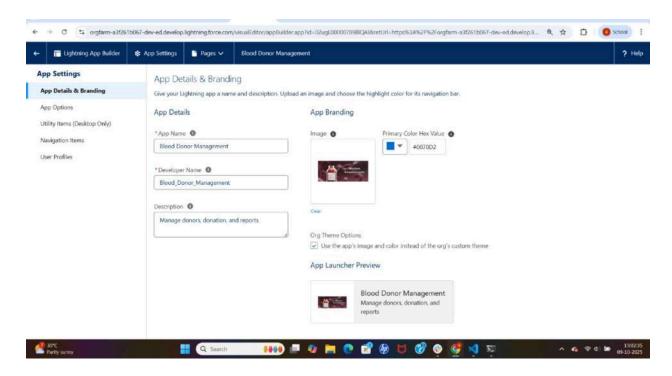
Phase 6: User Interface Development

Step 1. Lighting App Builder

Lightning App Builder is a point-and-click tool in Salesforce that allows administrators to design and customize user interfaces without code. It provides drag-and-drop components to create pages for apps, records, and home screens.

For the Blood Donor Management project, it helps to design screens for **Donor, Donation, and Blood Camp

Purpose – The purpose of Lightning App Builder in this project is to design donor and donation pages, dashboards, and workflows that make blood donor management faster, simpler, and more effective for all users.



Step 2. Record Pages

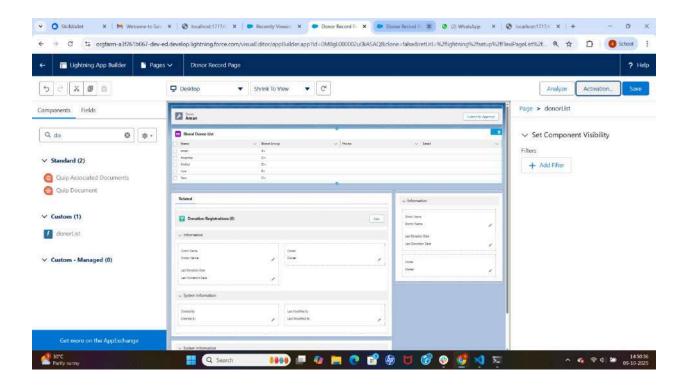
A Record Page in Salesforce Lightning App Builder is a customized layout that controls how a single record (like a Donor or a Donation) is displayed.

It allows administrators to add components such as record details, related lists, charts, and flows on one page.

Purpose of Record Pages

To give users a consolidated view of all important information related to a record. To make data entry and updates faster and easier.

To integrate flows, charts, and quick actions directly into the record screen.



Step 3. Tabs

Tabs in Salesforce are navigation elements that allow users to access different objects, pages, or components within an app.

They make it easier for users to move between various parts of the application without confusion.

Each tab represents a specific object or functionality.

In the Blood Donor Management Project, tabs are used to separate and organize data related to donors, donation registrations, and donation requests.

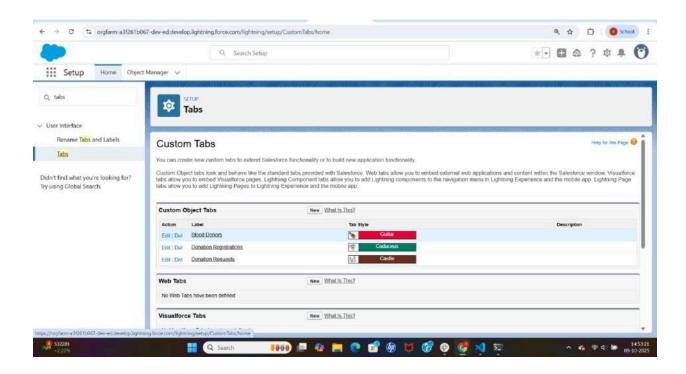
Purpose of Tabs

To provide easy navigation between different sections of the application.

To make the user interface simple and organized.

To allow users to quickly access records of donors, donations, and requests.

To improve the usability of the Lightning App by dividing it into clear parts.



Step 4. Home Page Layouts

In Salesforce, Home Page Layouts define what users see when they first open an app.

It provides an overview of key information, quick actions, reports, and dashboards — all in one place.

A well-designed home page layout helps users quickly access important data and perform frequent actions efficiently.

Purpose of Home Page Layout

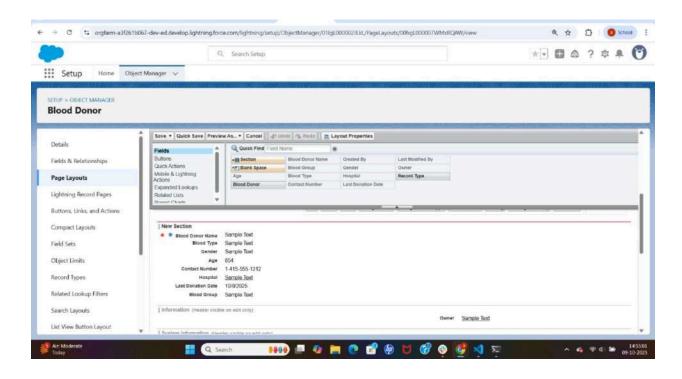
To display important donor statistics and real-time information.

To provide quick access to frequently used records and actions.

To create a dashboard-like view for users (Admin, Volunteer, or Staff).

To make the system interactive and user-friendly.

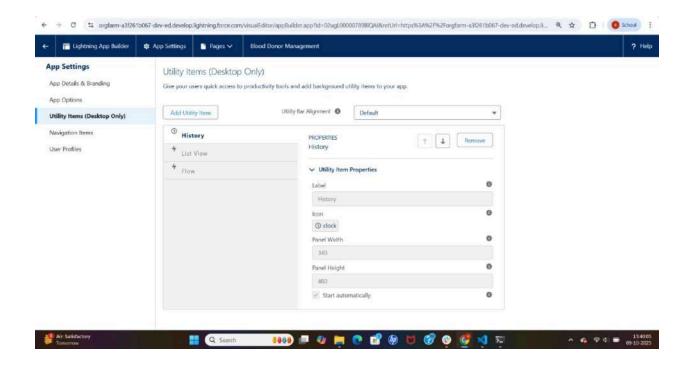
To show charts, reports, and key metrics for better decision-making.



Step 5. Utility Bar

The Utility Bar in Salesforce Lightning is a fixed footer bar that provides quick access to important tools and utilities in your app. It allows users to perform frequent tasks or access key features without leaving their current page.

- 1. Open Setup → App Manager → Edit Lightning App.
- 2. Select Utility Items (Desktop Only) from the left panel.
- 3. Click Add Utility Item → Choose options like History, Flow, or List View.
- 4. Set the Label, Icon, Panel Width, and Panel Height (e.g., 340 x 480).
- 5. Check the option "Start automatically" if you want it to open automatically when the app loads.
- 6. Click Save and Activate.



Step 6. LWC (Lightning Web Components)

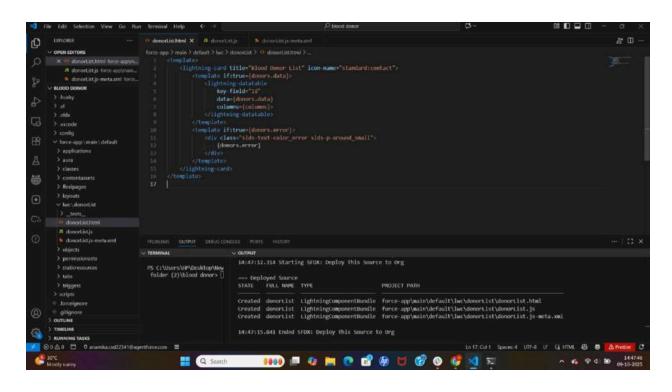
Lightning Web Components (LWC) is a modern framework introduced by Salesforce for building fast, lightweight, and reusable components for the Salesforce platform. LWC is based on standard web technologies like HTML, CSS, and JavaScript, which makes it easier for developers to create responsive and efficient user interfaces. LWC works seamlessly with the Salesforce data model, allowing developers to access Salesforce objects, fields, and business logic through Apex classes and Lightning Data Service.

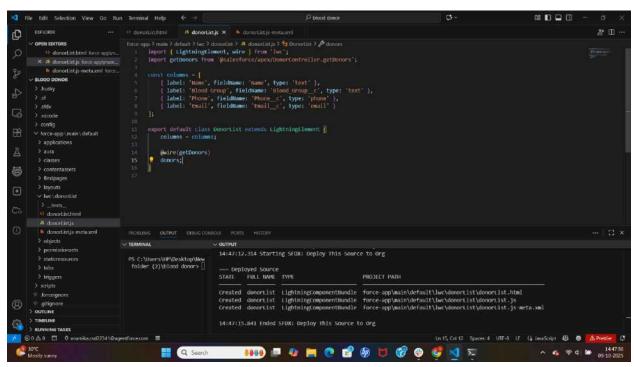
Key Features of LWC

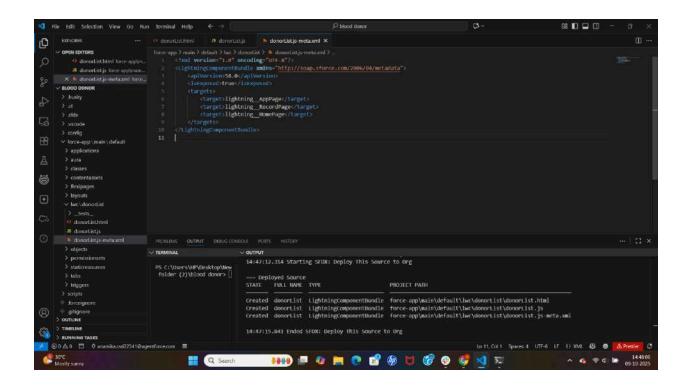
Uses standard web components for better performance.

Lightweight and fast compared to Aura Components.

Can be integrated with Salesforce Lightning pages, apps, and record pages. Supports event-driven architecture to communicate between components. Enables reusability and modular design.

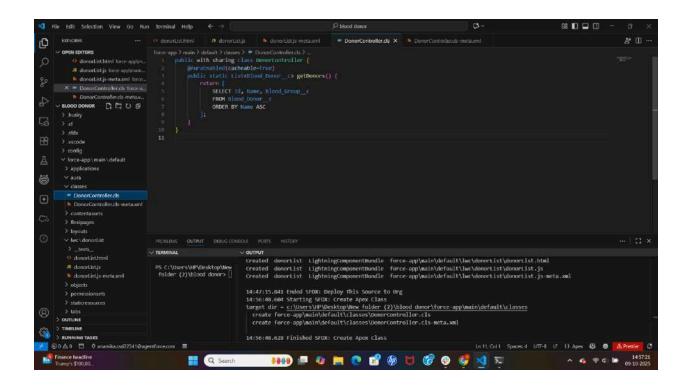






Step 7. Apex With LWC

Apex is the server-side language of Salesforce, used for database operations and business logic. Lightning Web Components (LWC) are used for building modern, fast, and reusable user interfaces. By combining both, LWC handles the user interface while Apex fetches or updates data from Salesforce objects, enabling dynamic and interactive applications (e.g., searching donors by blood group in a Blood Donor Management project).



Step 8. Events in LWC

Events in Lightning Web Components (LWC) are custom or standard signals used to communicate between components or to trigger actions.

Purpose: To allow components to communicate in a structured way without tight coupling.

Types of Events in LWC

Standard DOM Events

Built-in events like click, change, input.

Example: <button onclick={handleClick}>Click Me</button>. Custom Events

Used to send data between components. Created using CustomEvent in JavaScript.

Can carry data in the detail property.

Step 9. Wire Adapters

Wire adapters are reactive mechanisms in LWC that automatically fetch data from Salesforce and pass it to your component.

They react to changes in the component's properties and refresh the data automatically.

Typically used to get data from Salesforce objects, Apex methods, or Lightning Data Service without manually writing complex logic.

Purpose

In Blood Donor Management System, wire adapters can be used to: Fetch the list of all donors.

Display blood requests dynamically.

Show blood inventory status in real-time.

Advantages

```
Automatic reactivity: updates UI when data changes.
Reduces manual code for data fetching.
Easier maintenance and cleaner code.
import { LightningElement, wire } from 'lwc';
import getAllDonors from '@salesforce/apex/DonorController.getAllDonors';
export default class DonorList extends LightningElement {
  donors;
  error;
  // Wire the Apex method
  @wire(getAllDonors)
 wiredDonors({ error, data }) {
    if (data) {
      this.donors = data;
      this.error = undefined;
    } else if (error) {
      this.error = error;
      this.donors = undefined;
```

```
}
}
}
```

Step 10. Imperative Apex Calls

Imperative Apex calls allow an LWC component to explicitly call an Apex method when needed, rather than automatically fetching data like a wire adapter. Provides more control over when and how data is fetched.

Used when data is dependent on dynamic input parameters or needs processing before display.

Purpose

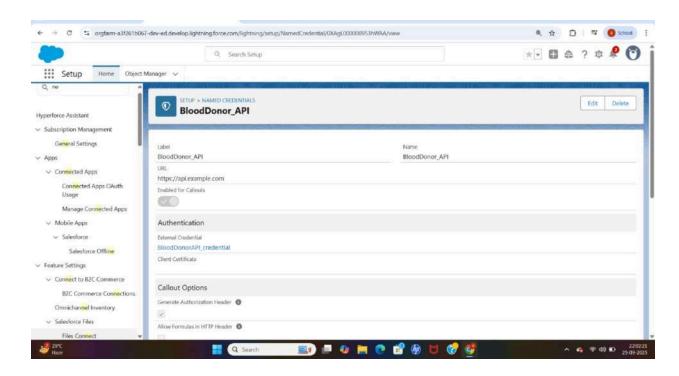
```
Imperative Apex calls are useful to:
Submit a new blood request after a form is filled.
Update a donor's status after a donation.
Approve or reject urgent blood requests.
import { LightningElement, track } from 'lwc';
import createBloodRequest from
'@salesforce/apex/BloodRequestController.createBloodRequest';
import { ShowToastEvent } from 'lightning/platformShowToastEvent';
export default class BloodRequestForm extends LightningElement {
  @track donorId;
  @track units;
 handleDonorChange(event) {
    this.donorId = event.target.value;
  }
 handleUnitsChange(event) {
    this.units = event.target.value;
  }
```

```
handleSubmit() {
    // Imperative Apex call
    createBloodRequest({ donorId: this.donorId, units: parseInt(this.units) })
      .then(result => {
        this.dispatchEvent(
          new ShowToastEvent({
            title: 'Success',
            message: result,
            variant: 'success'
          })
        );
      })
      .catch(error => {
        this.dispatchEvent(
          new ShowToastEvent({
            title: 'Error',
            message: error.body.message,
            variant: 'error'
          })
        );
      });
 }
}
```

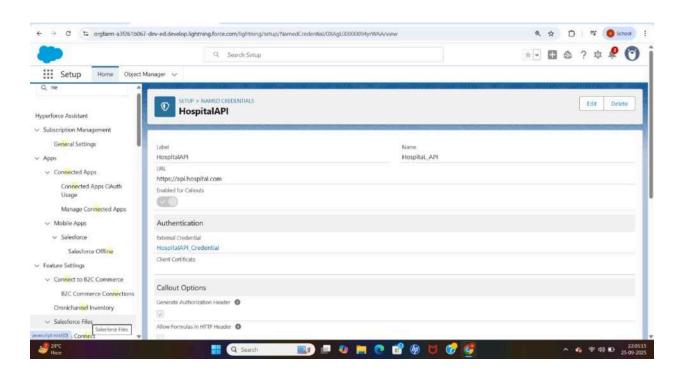
Phase 7. Integration & External Access

Step 1. Named Credentials

```
Label - BloodDonor_API
Name - BloodDonor_API
```

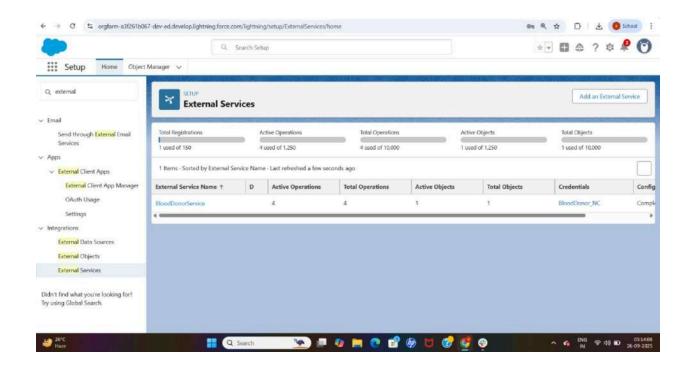


Label - HospitalAPI Name - Hospital_API



Step 2. External Service Name

BloodDonorService
. Description
Service to manage Blood Donor records through API integration.
. Service Schema
Uploaded JSON schema (blooddonor_service_schema.json) defining:
Get Donors
Add Donor
Get Donor by ID
Update Donor by ID
. Named Credential
BloodDonor_NC (used for authentication and endpoint configuration)
. Result
Registration Completed
Active Operations: 4
Total Objects Created: 1



Step 3. Callouts

Go to Setup → Remote Site Settings → New Remote Site

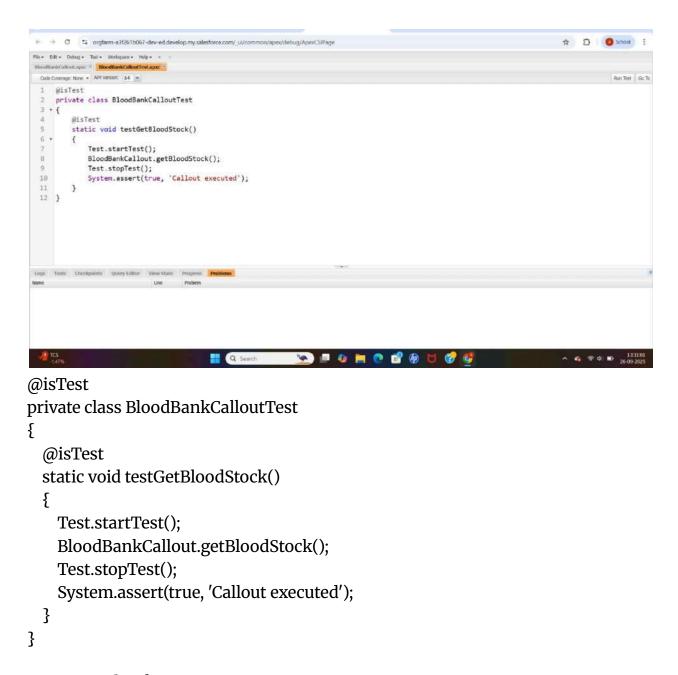
Remote Site Name: Blood_Bank_API

Setup → Named Credentials → New

Label: BloodBankAPI

Class Name - BloodBankCallout





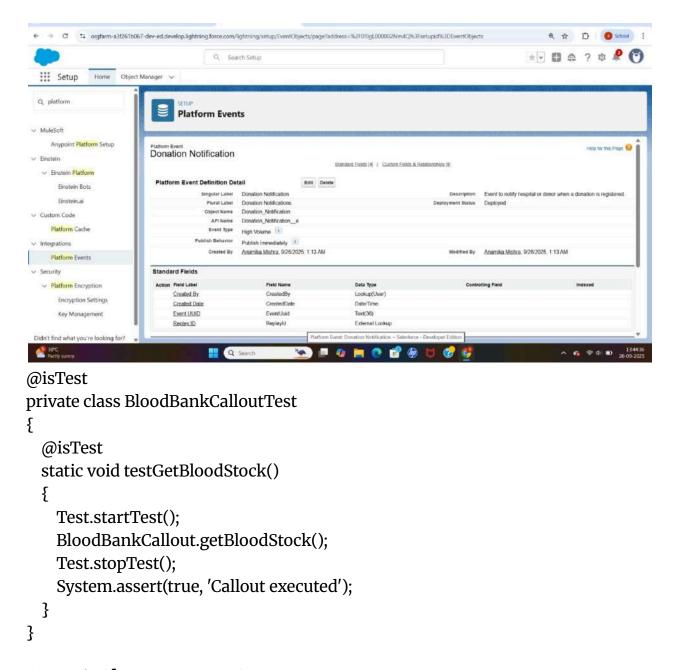
Step 4. Platform Events

Go to Setup → Platform Events → New Platform Event.

Label: Donation Notification

Plural Label: Donation Notifications

API Name: Donation_Notification__e



Step 5. Change Data Capture

Go to Setup \rightarrow Quick Find \rightarrow Change Data Capture.

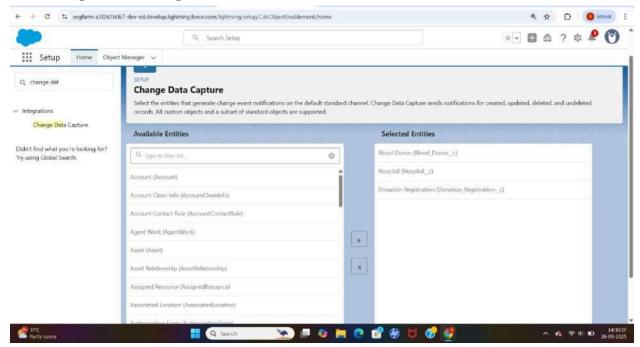
Click Enable Entities.

Select the objects you want to track (for example):

Blood_Donor__c (Donor object)

Donation_Registration_c (Donation records)

Hospital_c (Hospital details)

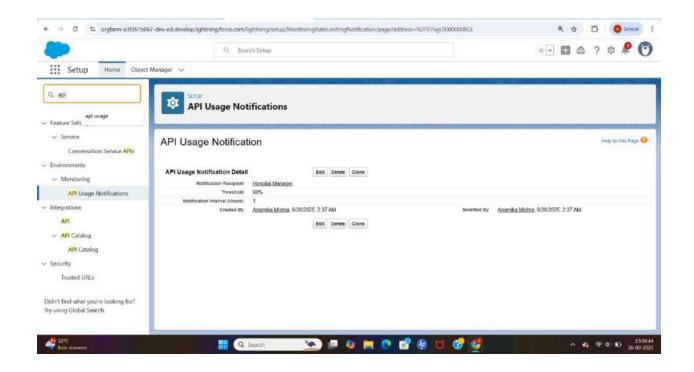


Step 6. API Limits

Recipient: Hospital Manager

Threshold: 90%

Interval: 1 hour



Step 7. OAuth & Authentication

Setup → App Manager → New Connected App

Fill details:

Connected App Name: BloodDonorApp

API Name: BloodDonorApp

Contact Email: aapka email

Enable OAuth Settings:

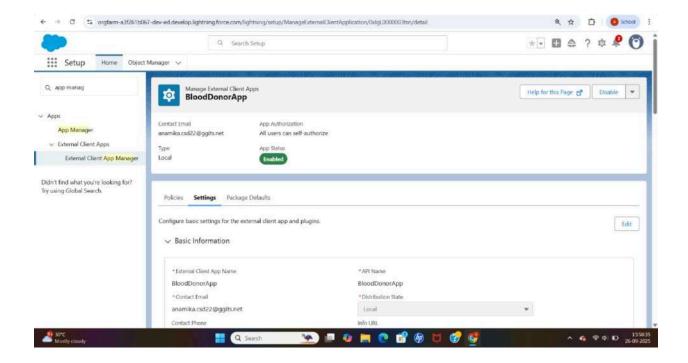
Enable OAuth Settings → check

 $Callback\ URL:\ https://login.salesforce.com/services/oauth2/callback\ (testing)$

Selected OAuth Scopes:

Full access (full)

Perform requests on your behalf at any time (refresh_token, offline_access)



Step 8. Remote Site Settings

Purpose:

Remote Site Settings in Salesforce allow your org to make callouts to external APIs securely. For the Blood Donor Management project, this is required to access external blood donor data.

1. Navigate to Remote Site Settings

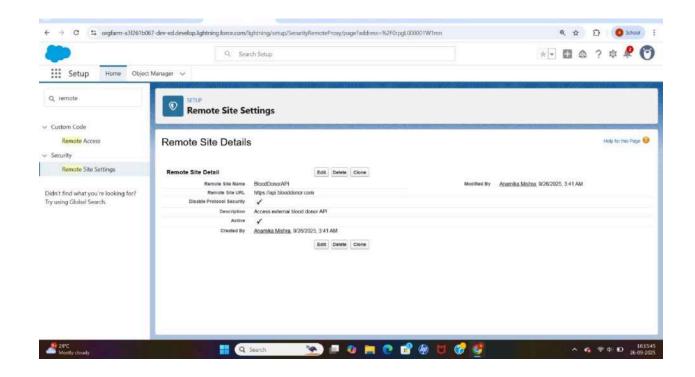
Go to Setup → Quick Find → Remote Site Settings → New Remote Site.

2. Enter Remote Site Details

Remote Site Name: BloodDonorAPI

Remote Site URL: https://api.blooddonor.com

Description: Access external blood donor API



Phase 8: Data Management & Deployment

Step 1. Data Loader

Purpose

Bulk import, export, update, delete Salesforce records.

Useful for large data operations (thousands or millions of records).

Supports CSV file format and automation via command line.

Steps (Process)

Download & Install Data Loader → From Salesforce Setup → Data Loader.

 $Login \rightarrow Use \ Sales force \ credentials \ (or \ OAuth).$

Select Operation → Insert, Update, Upsert, Delete, Export, Export All.

Choose Object → Select the Salesforce object to work on (e.g., Contact, Account).

Select CSV File → Map CSV columns to Salesforce fields.

Run Operation \rightarrow Process the data.

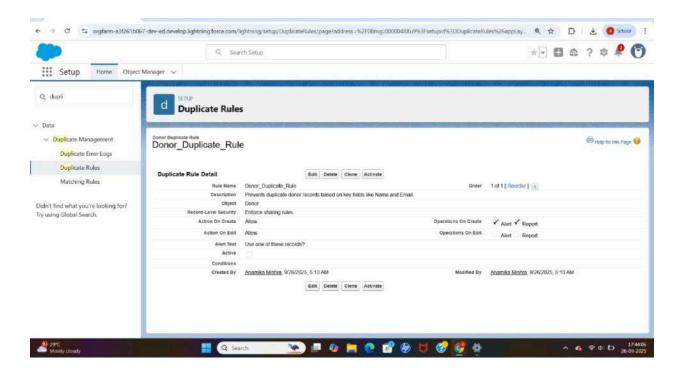
Check Results → Review success and error files generated by Data Loader.

Step 2. Duplicate Rules

Rule Name - Donor_Duplicate_Rule

Description - Prevents duplicate donor records based on key fields like Name and Email.

Object - Donor



Step 4: Data Export & Backup

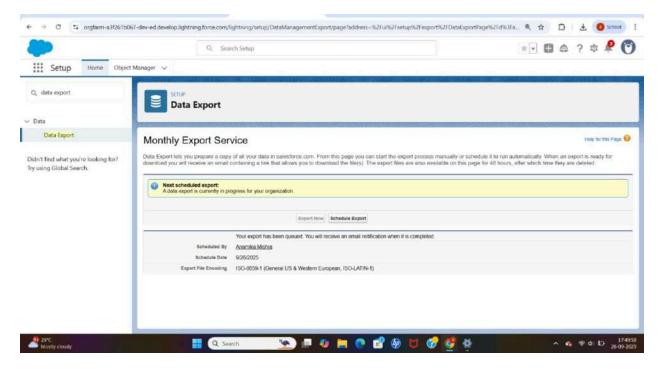
Purpose: Backup donor data regularly to avoid loss.

1. Select objects:

BloodDonor__c

 $Donation Registration_c$

4. Export & download ZIP file with CSVs.

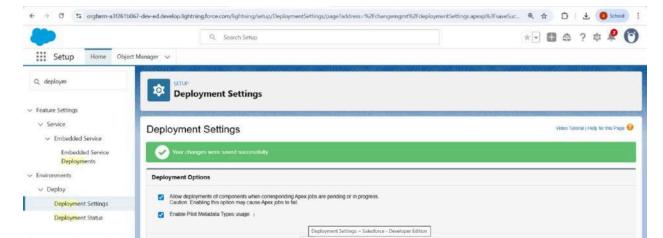


Step 5: Change Sets

A Change Set is a Salesforce tool used to deploy customizations and configurations from one Salesforce environment (usually Sandbox) to another (usually Production) without manually recreating them. It is mainly used for moving metadata like objects, fields, flows, Apex classes, triggers, and other components.

Types:

- 1. Outbound Change Set Created in the source org (Sandbox) to send components to another org.
- 2. Inbound Change Set Received in the target org (Production) to deploy the components.



Step 6. ANT Migration Tool

Purpose

Automate deployment of metadata between Salesforce orgs.

Useful for continuous integration (CI) and version control.

Works well for large projects with many components.

Steps (Process)

Install Java & ANT → Ensure Java and Apache ANT are installed on your system.

Download Salesforce ANT Migration Tool \rightarrow From Salesforce Setup \rightarrow Tools \rightarrow Force.com Migration Tool.

Set Up project folder → Create a folder for project and build files.

Configure build.xml & package.xml → Define metadata to retrieve/deploy.

Retrieve Metadata → Use ANT command:

ant retrieve

Deploy Metadata → Use ANT command:

ant deploy

Phase 9. Reporting, Dashboards & Security Review

Step 1. Reports(Tabular, Summary, Matrix, Joined)

Purpose

Define which objects and fields are available for reports in Salesforce.

Control how records are related in reports.

Allow creation of custom reports for specific business needs.

Small Steps (Process)

Go to Setup \rightarrow Search Report Types.

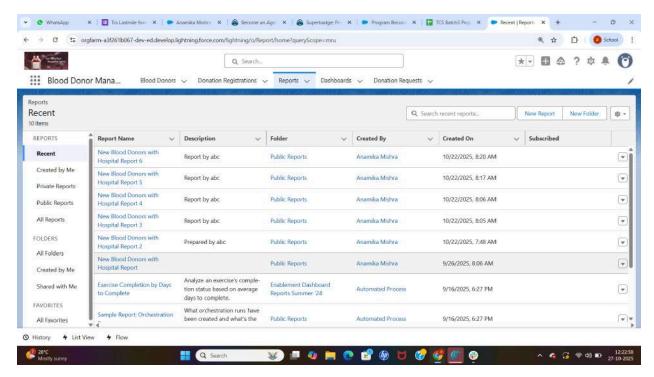
Click "New Custom Report Type".

Select Primary Object → Choose the main object (e.g., Accounts, Orders).

Define Related Objects → Add related objects if needed.

Set Deployment Status → In Development (editable) or Deployed (available to all users).

Save → Use this report type when creating reports.



Step 2. Report Types

Purpose

Visually display Salesforce data in charts, graphs, tables, and gauges. Provide quick insights and analytics for decision-making. Summarize reports for managers and teams.

Steps (Process)

Go to Dashboards Tab → Click New Dashboard

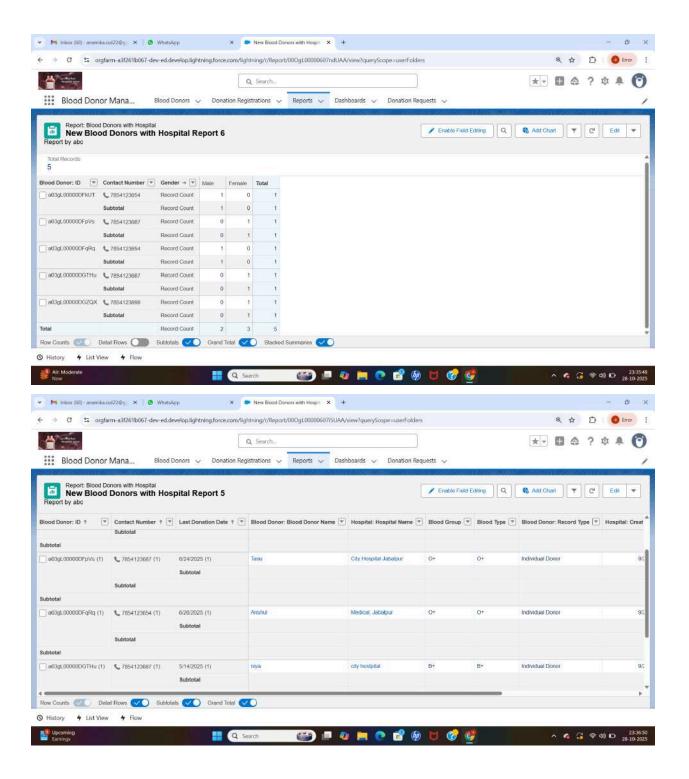
Name Dashboard → Give a meaningful name and select a folder.

Add Components → Charts, graphs, tables, gauges.

Select Source Reports → Choose reports that will feed data to dashboard components.

Customize Components → Adjust chart types, filters, labels.

Save & Refresh → Ensure data is up-to-date.

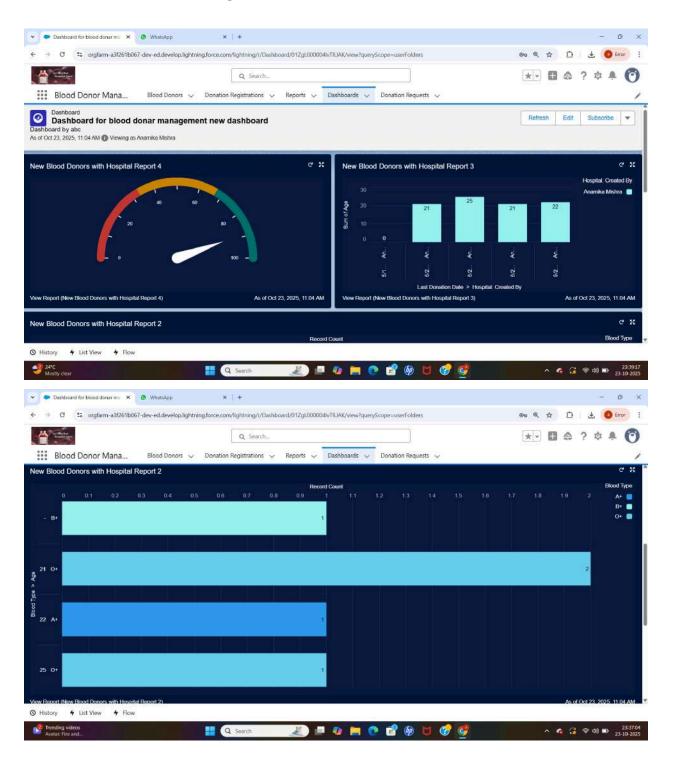


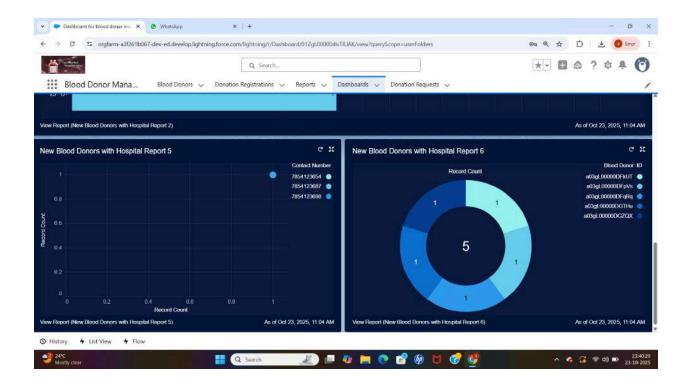
Step 3. Dashboards

The **Dashboard** is an essential component of the Blood Donor Management System.

It provides a **visual summary of important data** such as the number of registered donors, available blood groups, and donation activities.

Through charts, tables, and key metrics, the dashboard helps administrators quickly monitor and manage the overall system performance.





Step 4. Sharing Settings

Purpose

Control record-level access in Salesforce.

Define who can view, edit, or delete records.

Maintain data security while enabling collaboration.

Steps (Process)

Go to Setup → Search Sharing Settings.

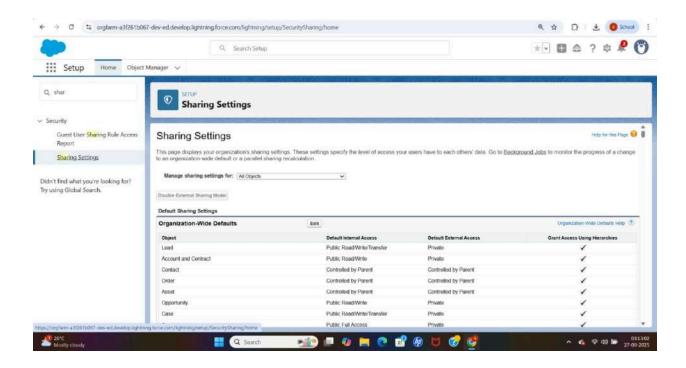
Set Organization-Wide Defaults (OWD) → Define baseline access for each object (Public, Private, Controlled).

Create Sharing Rules → Grant access to specific groups/roles.

Use Role Hierarchies → Inherit access based on role levels.

Set Manual Sharing → Allow record owners to share records individually.

Test Access → Log in as a user to verify permissions.



Step 5. Field Level Security

Purpose

Control visibility and editability of individual fields in Salesforce objects. Protect sensitive data while allowing access to necessary information. Apply security at the profile or permission set level.

Steps (Process)

Go to Setup → Search Field Accessibility or Profiles.

Select Object → Choose the object containing the field.

Select Field \rightarrow Click on the field to edit security.

Set Access Levels →

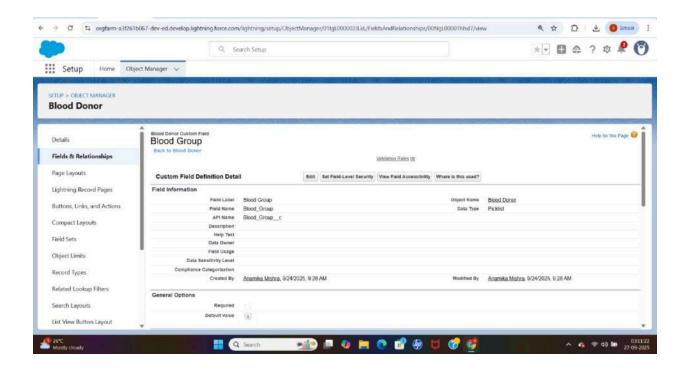
Visible → User can see the field.

Read-Only → User can view but not edit.

Hidden → Field is not visible.

Save Changes → Apply settings for profiles or permission sets.

Test Access → Log in as user to confirm field visibility.



Step 6. Session Settings

Purpose

Control user session behavior in Salesforce for security and performance.

Define session timeout, security policies, and login access.

Protect org data by managing how and when sessions expire.

Steps (Process)

Go to Setup → Search Session Settings.

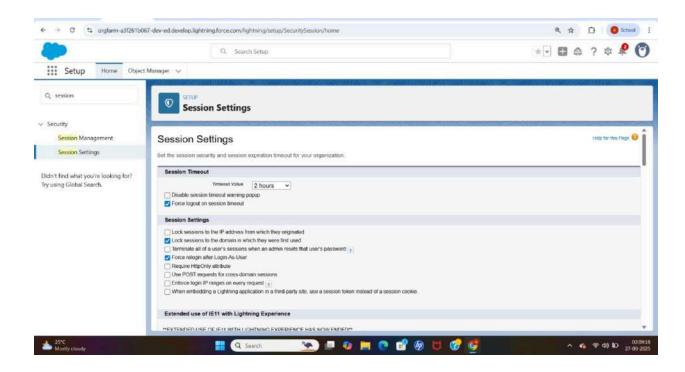
Set Session Timeout → Choose duration (e.g., 30 min, 2 hours).

Configure Security Policies → Enable/disable secure session settings (e.g., IPranges, login hours).

Enable/Disable Persistent Sessions → Decide whether users stay logged in across browser restarts.

Save Changes → Apply settings.

Test → Log in as a user to verify session behavior.



Step 7. Login IP Ranges

Purpose

Restrict Salesforce login access to specific IP address ranges. Enhance org security by controlling where users can log in from. Useful for enforcing network-based access control.

Steps (Process)

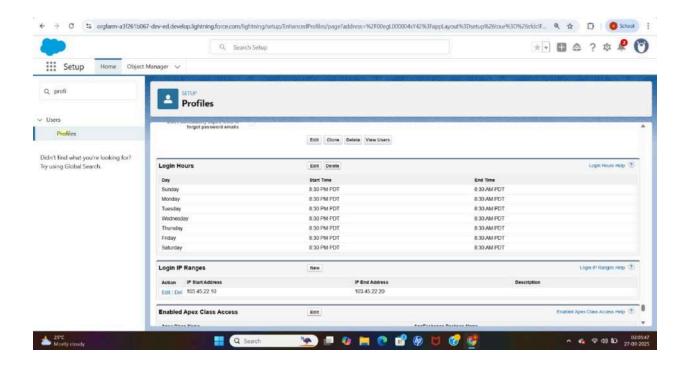
Go to Setup → Search Profiles (IP ranges are set per profile).

Select Profile → Click the profile you want to set IP ranges for.

Find Login IP Ranges Section → Click New.

Enter IP Range → Start IP and End IP addresses (e.g., 103.45.22.10 to 103.45.22.20).

Save Changes → Restriction applies immediately.



Step 8. Audit Trail

Purpose

Track administrative changes for accountability.

Support compliance and security audits.

Help troubleshoot unexpected behavior by reviewing configuration changes.

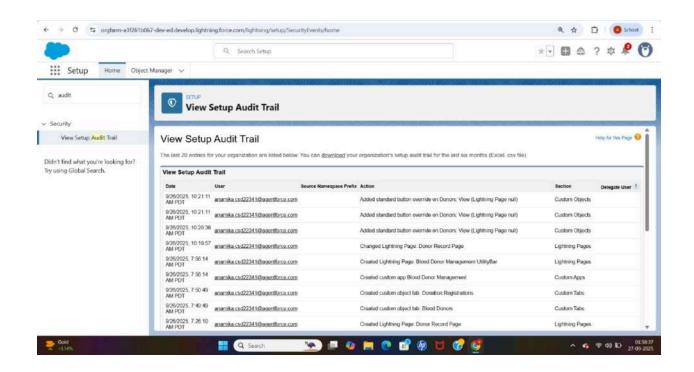
Steps (Process)

Go to Setup → Search View Setup Audit Trail.

Review Recent Changes → See changes for the last 180 days.

Download Audit Log \rightarrow Export for analysis or compliance documentation.

Filter by Date/User → Focus on specific changes.



Phase 10. Final Presentation & Demo Day

1. Pitch Presentation

Purpose: Introduce the project, its value, and impact.

Problem Statement: Challenges in blood donation and management.

Solution: How the Blood Donor Management System addresses these challenges.

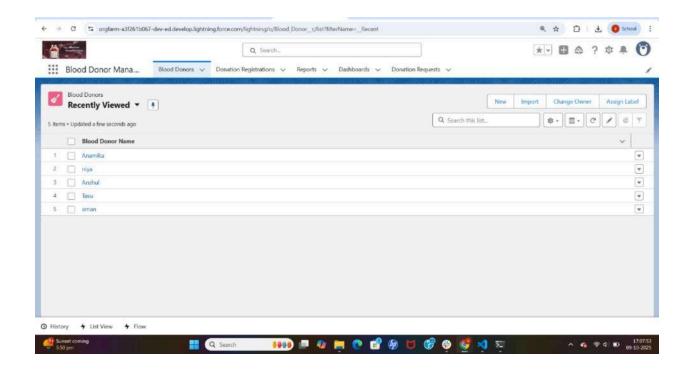
Impact: Efficiency, timely blood availability, better donor engagement.

2. Demo Walkthrough

Purpose: Showcase the project in action.

Steps:

- 1. Login & Home Page overview.
- 2. Donor registration process.
- 3. Blood inventory & donation tracking.
- 4. Reports & dashboards highlights.
- 5. Any automation (notifications, alerts).



3. Feedback Collection

Purpose: Gather suggestions for improvement.

Methods:

Online forms (Google Forms, SurveyMonkey).

Verbal feedback during demo.

Focus Areas: Usability, completeness, design, functionality, real-world applicability.

4. Handoff Documentation

Purpose: Enable smooth continuation or deployment by other users or developers.

Content:

System overview and architecture.

Salesforce objects, fields, and relationships.

Reports, dashboards, and automation details.

User manual for donor registration, reporting, and notifications.

Deployment or setup instructions.

5. LinkedIn/Portfolio Project Showcase

Project Title: Blood Donor Management System

Summary: Salesforce application for managing donors, blood requests, and inventory efficiently.

Key Features:

Donor registration and management

Blood request submission using Imperative Apex

Real-time donor list updates with Wire Adapters

Blood inventory tracking

Lightning App Builder, Tabs, Home Page Layouts, and Utility Bar integration

Conclusion

The Blood Donor Management System built on Salesforce provides a comprehensive solution to streamline blood donation processes. By centralizing donor information, tracking donations, managing blood inventory, and enabling automated notifications, the system improves efficiency, reduces errors, and ensures timely availability of blood for patients in need.

The project demonstrates how Salesforce's powerful features—like Lightning Web Components, Apex, Reports, and Dashboards—can be leveraged to create a user-friendly, scalable, and impactful solution. Overall, this system not only enhances hospital operations but also fosters better engagement with donors, ultimately contributing to saving lives.