



# PROJECT TITLE : FOOD CONNECT CRM APPLICATION

## Project Overview:

The *FoodConnect Initiative* aims to accomplish several core goals focused on building an efficient volunteer management system, especially for managing food distribution logistics. These goals are purposefully crafted to improve operational efficiency, precision, and engagement within the Salesforce platform.

Here's a rephrased version of the objectives for \*FoodConnect Initiative:

### 1. Optimized Task Assignment and Resource Utilization:

- Design a smart task allocation system that aligns volunteer schedules and location information with distribution activities, ensuring tasks are completed promptly and resources are used effectively across various sites.

### 2. Improved Data Accuracy and Consistency:

- Establish a data validation and synchronization process to uphold accurate records for all locations, reducing discrepancies and providing stakeholders with reliable, up-to-date information.

### 3. Efficient Communication System:

- Enable instant communication through in-platform messaging and notifications, ensuring all participants are promptly informed of their duties and any changes to distribution plans.

### 4. Enhanced Volunteer Experience and Retention:

- Integrate feedback mechanisms and satisfaction tracking to monitor and elevate the volunteer experience, fostering sustained involvement and commitment.

### 5. Comprehensive Reporting and Insights:

- Develop a reporting dashboard in Salesforce to monitor distribution metrics, task progress, volunteer engagement, and other essential KPIs, offering actionable insights to drive continuous improvement and meet strategic objectives.

## Objectives:

The *FoodConnect Initiative* aims to achieve essential business objectives and targeted technical outcomes to improve volunteer management and streamline food distribution logistics.

### Business Goals:

- Enhance Volunteer Management Efficiency:
  - Develop a structured task allocation system to streamline coordination, making it easier for volunteers to understand their roles and stay engaged.
- Improve Data Accuracy and Dependability
  - Implement protocols to keep venue, drop-off, and volunteer data accurate and up-to-date, promoting easy access to reliable information.
- Strengthen Communication and Coordination
  - Create a strong communication framework to enable smooth, effective interactions among volunteers, coordinators, and other stakeholders throughout the food distribution process.

### Specific Outcomes:

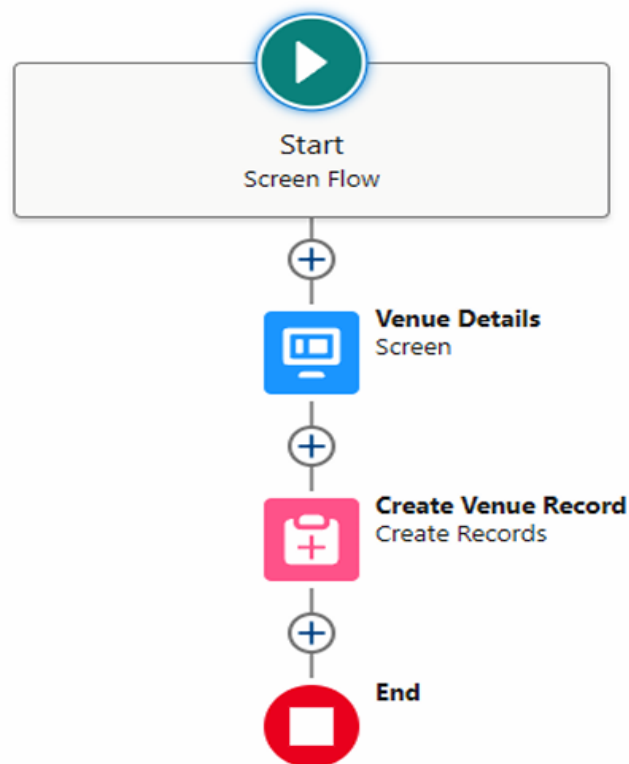
- Design of Custom Data Models:
  - Develop custom data models within Salesforce for managing Venues, Drop-Off Points, Tasks, Volunteers, and Execution Details, supporting organized data storage and easy retrieval.
- Development of an Intuitive Lightning App:
  - Build a Lightning App with a streamlined, user-friendly interface, offering easy access to critical information and smooth navigation across various features.
- Implementation of Targeted Sharing Rules:
  - Establish sharing rules to control data access based on geographic proximity, enabling volunteers to view tasks and information relevant to their specific areas.

## Salesforce Key Features and Concepts Used:

To fulfill the project objectives, the following Salesforce features and concepts have been implemented:

- Custom Objects:
  - Venues: Stores essential details for locations where food distribution activities are scheduled. Key fields include Venue Name, Address, Capacity, and Contact Information.
  - Drop-Off Points: Captures information about specific delivery locations, providing clear instructions for volunteers on where to pick up or drop off food.
  - Tasks: Tracks volunteer assignments, with fields for Task Name, Description, Due Date, and Assigned Volunteer.

- **Volunteers:** Maintains records of all program participants, including their contact information and availability.
- **Execution Details:** Logs completed tasks, creating a detailed record of each volunteer's contributions.
- **Relationships:**
  - **Master-Detail and Lookup Relationships:** Defines data interconnections. For instance, a Master-Detail relationship between Tasks and Execution Details enables multiple execution records for each task, while a Lookup relationship between Volunteers and Drop-Off Points allows easy tracking of volunteer assignments at specific locations.
- **Flows:**
  - **Salesforce Flow:** Automates the creation of Venue records and guides users through structured steps to ensure that all essential information is accurately gathered. Implemented ScreenFlow is mentioned below:



- **Triggers:**
  - **Apex Triggers:** Automates specific actions based on set conditions, such as calculating distances between venues and volunteer locations when records are added or updated.

- Reports and Dashboards:
  - Custom Reports and Dashboards: Provide visual insights into volunteer activities, tracking metrics like completed tasks, volunteer hours, and food distribution statistics.

## **Detailed Solution Design Steps:**

The following steps outline the design and implementation process for the *FoodConnect* solution:

### **A. Setting Up a Developer Account:**

- Register for a Salesforce Developer account to use as the project's development and testing environment.
- Confirm the account via verification email to access all Salesforce features.

### **B. Custom Object Creation:**

- Access the Object Manager in Salesforce Setup to build the required custom objects. Each object will have fields configured to capture pertinent data accurately.

### **C. Custom Tab Creation:**

- Set up custom tabs for each object to simplify user navigation within the Salesforce interface.

### **D. Lightning App Development:**

- Utilize the App Manager to create a Lightning App called "FoodConnect."
- Add key navigation items, including custom objects and reports, and set user profiles to restrict access based on role permissions.

### **E. Relationship Establishment:**

- Create Lookup and Master-Detail fields in the Object Manager to define data relationships, enabling efficient data retrieval and reporting.

### **F. Field Configuration for Objects:**

- Define fields for each custom object, specifying data types (e.g., Text, Number, Date) and attributes (e.g., Required, Unique) to ensure comprehensive data capture.

### **G. Flow Creation:**

- Design a screen flow for entering Venue information, enabling users to input data with ease and automating record creation for accuracy.

#### H. Trigger Development:

- Implement Apex triggers to automate calculations, such as calculating the distance between volunteers and venues. This feature will help assign volunteers to nearby tasks, enhancing logistical efficiency.

#### I. User Management:

- Create user profiles for different roles, such as volunteers and administrators, and assign permissions accordingly to manage data access and functionality.

#### J. Report Types and Dashboards:

- Set up custom report types to monitor volunteer activities and develop dashboards to visualize key metrics for food distribution and volunteer engagement.

### 5. Testing and Validation:

A thorough testing phase ensures the system functions as expected:

- Unit Testing: Run unit tests on Apex classes and triggers to confirm their performance and reliability across various scenarios.
- User Interface Testing: Verify that the user interface is intuitive and accessible, enabling users to navigate and complete tasks with ease.

### 6. Key Scenarios Addressed in the Salesforce Implementation:

The *FoodConnect* project effectively addresses several critical scenarios:

- Volunteer Assignment Management: Volunteers are assigned tasks based on their availability and location, improving efficiency in food distribution logistics.
- Food Distribution Tracking: The system monitors food distribution across venues and drop-off points, allowing coordinators to track progress and enhance operational effectiveness.
- Volunteer Activity Reporting: System-generated reports provide insights into volunteer activities, such as completed tasks and received feedback, supporting improvements for future initiatives.

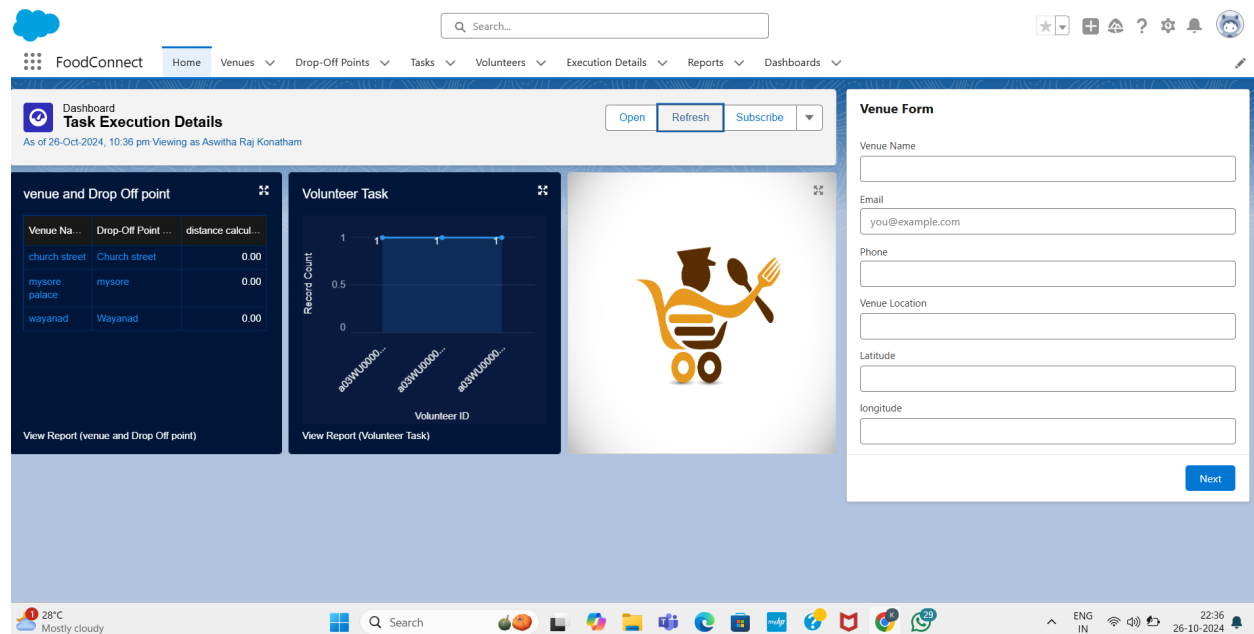
### Conclusion:

The *FoodConnect* project successfully established a robust volunteer management system within Salesforce, achieving major enhancements in data management, user experience, and operational efficiency. Through the use of custom objects, relationships, and automation, food distribution processes are now more streamlined, improving the organization's ability to coordinate volunteer efforts.

This project provides a solid foundation for future growth, scalability, and potential feature additions to further refine food distribution logistics. Moving forward, continuous monitoring, user feedback, and iterative updates will be key to keeping the system aligned with the organization's evolving needs and supporting the ongoing engagement of volunteers

## IMAGES RELATED TO THE FOODCONNECT:

### Dashboard:



Venues:

FoodConnect

Home Venues Drop-Off Points Tasks Volunteers Execution Details Reports Dashboards

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Venues

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2	<input type="checkbox"/> wayanad	▼
3	<input type="checkbox"/> mysore palace	▼

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2	<input type="checkbox"/> Wayanad	▼
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Tasks
Volunteers
Execution Details
Reports
Dashboards

Reports

Recent

4 items

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New Report

New Folder

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REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent						
Created by Me	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	25/10/2024, 10:45 pm	
Private Reports	Milestone Progress by User	Analyze how different users are progressing on a milestone.	Enablement Dashboard Reports Spring '24	Automated Process	25/10/2024, 10:45 pm	
Public Reports	Volunteer Task		Custom Reports	Aswitha Raj Konatham	26/10/2024, 2:43 pm	
All Reports	venue and Drop Off point		Custom Reports	Aswitha Raj Konatham	26/10/2024, 1:17 pm	
FOLDERS						
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All Favorites						

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