

TO SUPPLY LEFTOVER FOOD TO POOR

INTRODUCTION:

In this project, I utilized Salesforce, a leading CRM platform, to build a solution that helps in distributing leftover food to the needy. Salesforce provided me with various customization options to set up objects, automation, and reports. This project aims to resolve the problem of food wastage by efficiently collecting surplus food from venues and distributing it to drop-off points using volunteer support. The platform's flexibility allowed me to create an application that can manage the complete lifecycle of food collection and distribution.

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First name: Garudadri ✓ Last name: Vasanti ✓

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Company: Annmahacharya in ✓ Country/Region: India ✓

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☒ I agree to the [Main Services Agreement - Developer Services](#) and [Salesforce Program Agreement](#). I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

PROJECT OVERVIEW

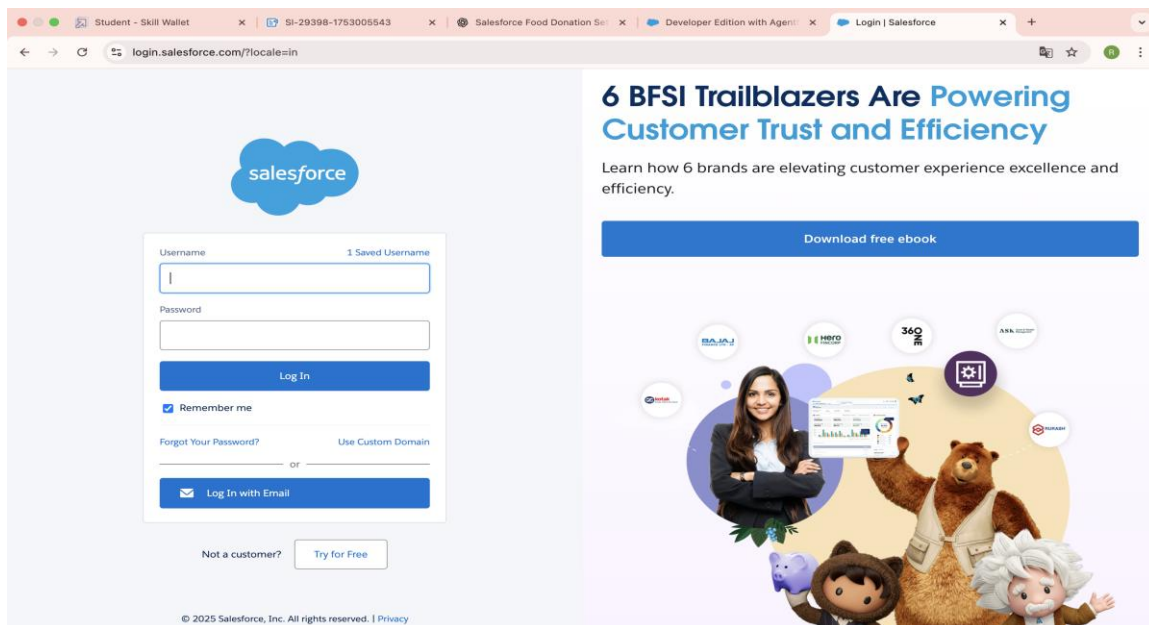
The food distribution project in salesforce is designed to streamline the process of collecting and distributing leftover food to those in need. The project uses salesforce object and automation tools to manage venues (where food is collected), drop-off points (where food is distributed), tasks (for managing food pickup and delivery), volunteers, and execution details for each distribution event. Key objects in the system include venue, drop-off point, task, volunteer, and execution details, each object captures essential data, such as venue locations, volunteer assignments, and food distribution statistics, enabling efficient tracking and coordination of the distribution process

Key features supporting the projectFor the “supply leftover food to the poor” project, salesforce can enhance operations through:

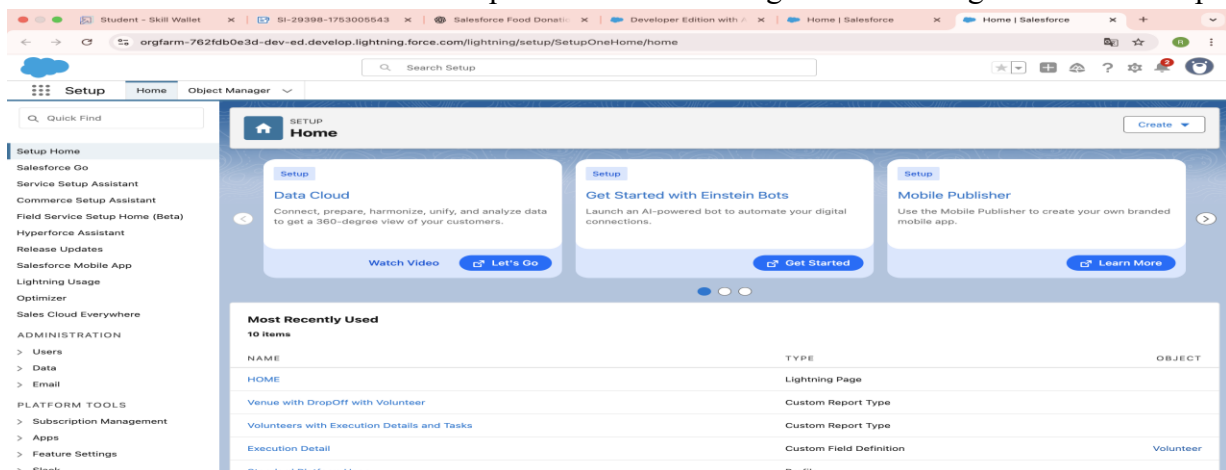
Data management: centralized storage of donor information, distribution points and logistical data.

Real-time reporting and analytics: allows for monitoring food supply levels, analysing and generating reports to improve efficiency.

Mobile accessibility: ensure volunteers and team members can update and access information on the go, a crucial feature for field operations in food distribution.



Give the username and password to login then go for setup



OBJECTIVE

The main objective of this project is to build a simple yet powerful Salesforce application that helps streamline food donation and volunteer management processes. The goal is to:

- Reduce food wastage
- Assign volunteers effectively
- Generate performance reports

- Make NGO processes more organized and transparent.

OBJECT

CREATION:

In this project, I created five custom objects in Salesforce to store all necessary information regarding food collection, delivery points, volunteer assignments, and task execution. Below are the steps I followed to create each object:

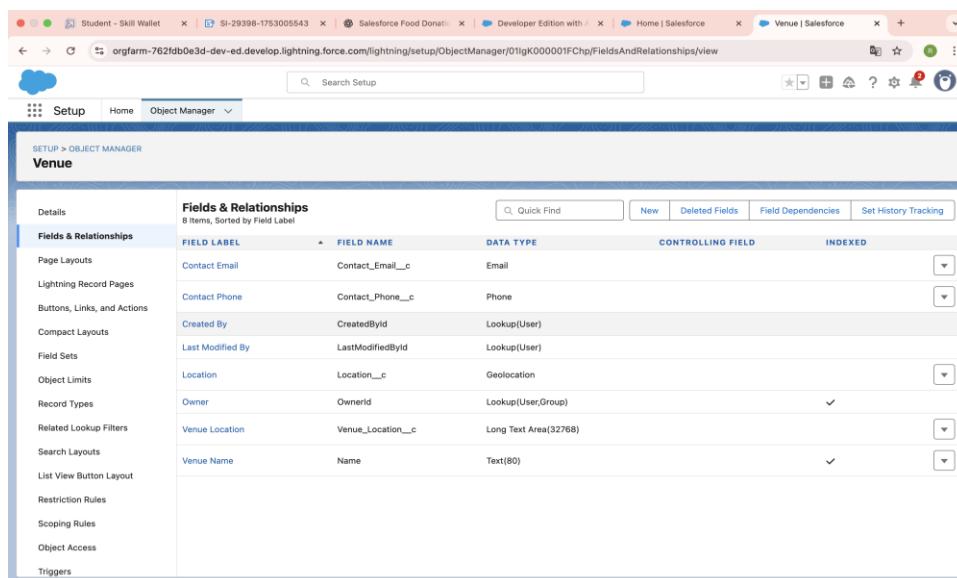
1.

VENUE:

Purpose: Stores information about food collection points.

- **Steps:** Setup → Object Manager → Create → Custom Object
- Label Name: **Venue**
- Plural Label: **Venues**
- Record Name: **Venue Name** (Text)
- Enable: Allow Reports, Track Field History, Allow Activities, Allow Search.
- Click

Save.



2.

DROP-OFF

POINT:

Purpose: Stores data about food delivery locations.

- **Steps:** Setup → Object Manager → Create → Custom Object
- Label Name: **Drop-Off Point**
- Plural Label: **Drop-Off Points**
- Record Name: **Drop-Off Point Name** (Text)
- Enable: Allow Reports, Track Field History, Allow Activities, Allow Search.

- Click **Save.**

The screenshot shows the Salesforce Setup interface for the 'Drop-Off Point' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, and Triggers. The main content area is titled 'Fields & Relationships' and shows a table of fields for the 'Drop-Off Point' object. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (CreatedById, Lookup(User)), Distance (Distance__c, Number(18, 0)), distance calculation (distance_calculation__c, Formula (Number)), Drop-Off Point Name (Name, Text(80)), Last Modified By (LastModifiedById, Lookup(User)), Location 2 (Location_2__c, Geolocation), Owner (OwnerId, Lookup(User,Group)), State (State__c, Picklist), and Venue__c (Venue__c, Lookup(Venue)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Distance	Distance__c	Number(18, 0)		
distance calculation	distance_calculation__c	Formula (Number)		
Drop-Off Point Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Location 2	Location_2__c	Geolocation		
Owner	OwnerId	Lookup(User,Group)		✓
State	State__c	Picklist		
Venue__c	Venue__c	Lookup(Venue)		✓

3. TASK:

- Purpose:** Tracks tasks like food pickup and delivery assignments.
- Steps:** Setup → Object Manager → Create → Custom Object
 - Label Name: **Task**
 - Plural Label: **Tasks**
 - Record Name: **Task Name** (Text)
 - Enable: Allow Reports, Track Field History, Allow Activities, Allow Search.
 - Click **Save.**

SETUP > OBJECT MANAGER

Task

Details

Fields & Relationships
15 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Date	Date__c	Date		
Distance	Distance__c	Number(14, 4)		
Drop-Off Point	Drop_Off_Point__c	Lookup(Drop-Off Point)		✓
Feedback	Feedback__c	Long Text Area(32768)		
Food Category	Food_Category__c	Picklist (Multi-Select)		
Last Modified By	LastModifiedById	Lookup(User)		
Name of the Person	Name_of_the_Person__c	Text(100)		
Number of People Served	Number_of_People_Served__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		

Triggers

4. VOLUNTEER:

- **Purpose:** Stores volunteer details such as contact and availability.
- **Steps:** Setup → Object Manager → Create → Custom Object
- **Label Name:** **Volunteer**
- **Plural Label:** **Volunteers**
- **Record Name:** **Volunteer Name** (Text)
- **Enable:** Allow Reports, Track Field History, Allow Activities, Allow Search.
- **Click Save.**

SETUP > OBJECT MANAGER

Volunteer

Details

Fields & Relationships
14 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

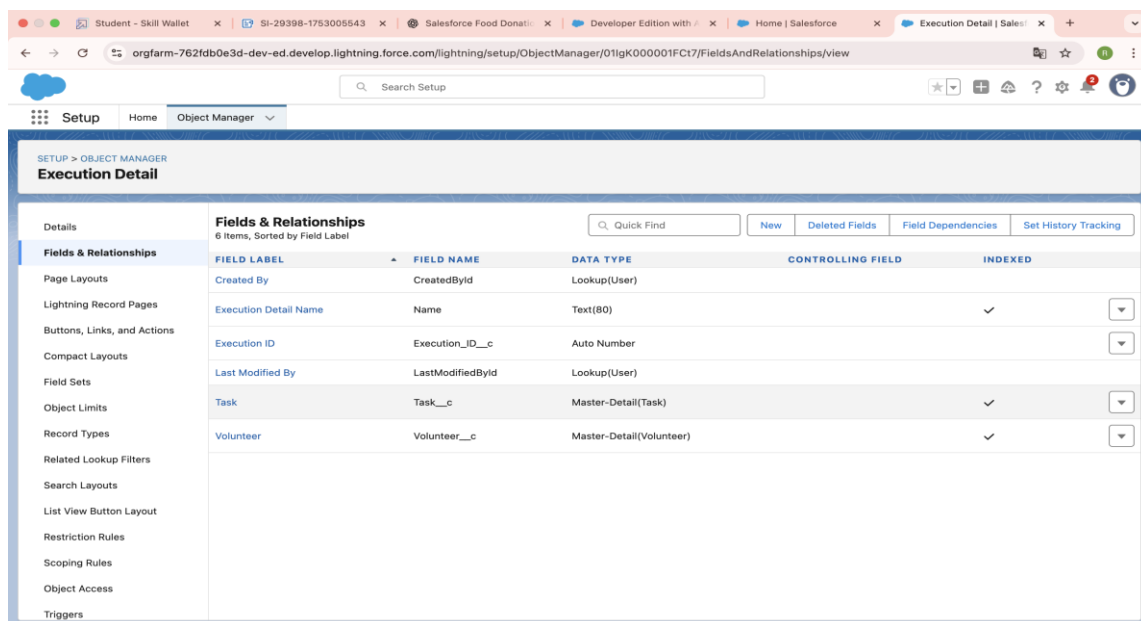
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Long Text Area(32768)		
Age	Age__c	Number(18, 0)		
Available On	Available_On__c	Date		
Contact Number	Contact_Number__c	Number(18, 0)		
Created By	CreatedBy	Lookup(User)		
Date of Birth	Date_of_Birth__c	Date		
Drop-OffPoint	Drop_Off_Point__c	Master-Detail(Drop-Off Point)		✓
Email	Email__c	Email		
Execution Detail	Execution_Detail__c	Lookup(Execution Detail)		✓
Execution ID	Execution_ID__c	Auto Number		
Gender	Gender__c	Picklist		

Triggers

5. EXECUTION DETAIL:

Purpose: Records the execution details of food deliveries.

- **Steps:** Setup → Object Manager → Create → Custom Object
- Label Name: **Execution Detail**
- Plural Label: **Execution Details**
- Record Name: **Execution Detail Name** (Text)
- Enable: Allow Reports, Track Field History, Allow Activities, Allow Search.
- Click **Save**.



TAB CREATION

In Salesforce, Tabs allow users to access and manage records of custom objects directly from the navigation menu. After creating my custom objects, I created individual tabs for each object so they can be easily accessible in the application.

Steps I Followed to Create Tabs in Salesforce:

1. I logged into Salesforce and went to the **Setup** area (Gear Icon in the top-right corner).
2. In the **Quick Find Box**, I typed **Tabs** and selected the **Tabs** option from the setup menu.
3. On the Tabs page, I scrolled down to the section called **Custom Object Tabs**.
4. I clicked on the **New** button to start creating a new tab.

Tab Creation for Each Object:

➤ **For Venue Tab:**

- I selected the **Venue** object from the **Object** dropdown list.
- I chose a **Tab Style** (an icon representing Venue).

- I clicked **Next** on the **Add to Profiles** step, leaving profile visibility at default (visible for all profiles).
- On the **Add to Apps** screen, I unchecked the box **Include Tab** since I manually managed tabs in my app later.
- I checked **Append tab to users' existing personal customizations** to make sure users can see the tab if added manually.
- I clicked **Save** to complete tab creation for Venue.

I repeated the exact same process for:

- **Drop-Off Point**
- **Task**
- **Volunteer**
- **Execution Detail**

The screenshot displays the Salesforce Setup interface for Custom Tabs. The left sidebar shows the navigation menu with 'Setup' and 'Home' tabs. The main content area is titled 'Custom Tabs' and includes a search bar and a 'Help for this Page' link. Below the title, there is a section for 'Custom Object Tabs' with a table listing existing tabs. The table has columns for 'Action', 'Label', 'Tab Style', and 'Description'. The tabs listed are 'Drop-Off Points' (Diamond), 'Execution Details' (Highway Sign), 'Tasks' (Hexagon), 'Venues' (Boat), and 'Volunteers' (Computer). Below this table, there are three sections for 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs', each with a 'New' button and a 'What is This?' link. Each of these sections indicates that no tabs have been defined for that category.

Action	Label	Tab Style	Description
Edit Del	Drop-Off Points	Diamond	
Edit Del	Execution Details	Highway Sign	
Edit Del	Tasks	Hexagon	
Edit Del	Venues	Boat	
Edit Del	Volunteers	Computer	

Web Tabs [New](#) [What is This?](#)
No Web Tabs have been defined

Visualforce Tabs [New](#) [What is This?](#)
No Visualforce Tabs have been defined

Lightning Component Tabs [New](#) [What is This?](#)
No Lightning component tabs have been defined

LIGHTNING APP CREATION

To create a Lightning App in Salesforce, follow these steps:

Step 1: Navigate to App Manager

- Go to Setup
- Type “App Manager” in the Quick Find bar

Click on App Manager

- Click “New Lightning App”

Step 2: App Details and Branding

- App Name: FoodConnect
- Developer Name: (Auto-populated)
- Image: Optional
- Primary Colour: Use default
- Click Next

Step 3: App Options

- Navigation Style: Select Standard Navigation
- Click Next

Step 4: Utility Items

- Keep default settings
- Click Next

Step 5: Add Navigation Items

- From the list, search and select the following:
- Home

- Venue
- Drop-Off Point
- Task
- Volunteer
- Execution Details
- Reports
- Use the arrow to add them
- Click Next, then Next again

Step 6: Assign User Profiles

Search for System Administrator

- Move it using the arrow
- Click Save & Finish

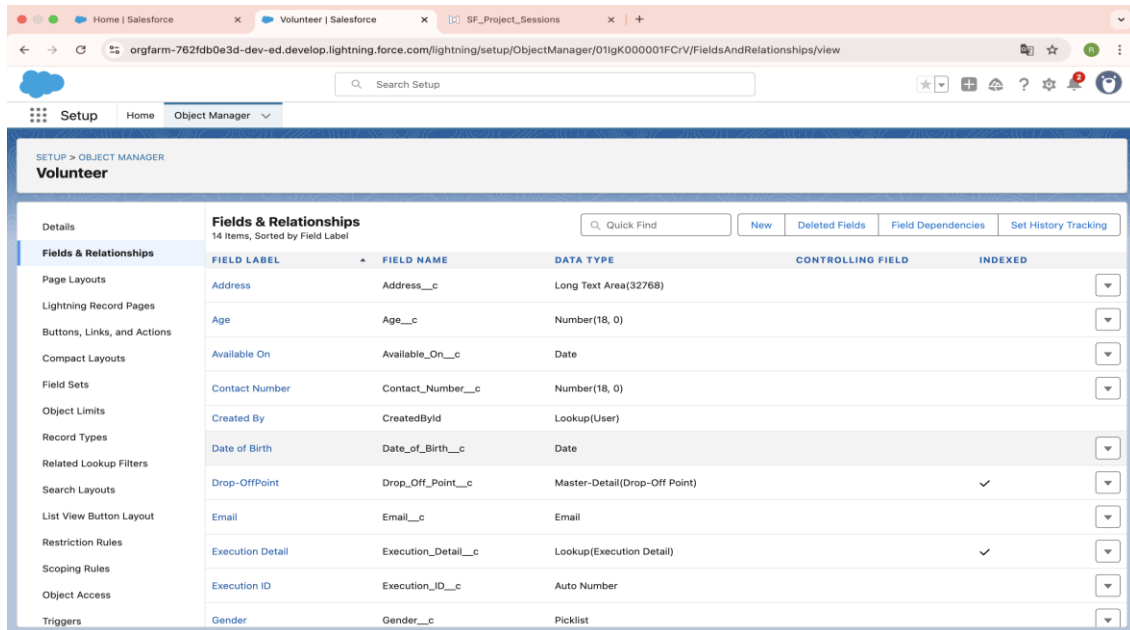
27 items - Sorted by App Name - Filtered by All appmenuitems - TabSet Type, App Type

	App Name	Developer Name	Description	Last Modified	App...	Vi...
9	Data Cloud	Audience...	build a thorough and complete understanding of your customers.	7/10/2025, 12:33 PM	Lightning	✓
10	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	7/10/2025, 12:33 PM	Lightning	✓
11	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	7/10/2025, 12:33 PM	Lightning	✓
12	FoodConnect	FoodConnect		7/18/2025, 8:54 AM	Lightning	✓
13	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	7/10/2025, 12:33 PM	Lightning	✓
14	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	7/10/2025, 12:33 PM	Classic	✓
15	My Service Journey	MSJApp	Discover new customer service capabilities.	7/10/2025, 12:33 PM	Lightning	✓
16	Platform	Platform	The fundamental Lightning Platform	7/10/2025, 12:33 PM	Classic	✓
17	Queue Management	QueueManagement	Create and manage queues for your business.	7/10/2025, 12:33 PM	Lightning	✓
18	Sales	Sales	The world's most popular sales force automation (SFA) solution	7/10/2025, 12:33 PM	Classic	✓
19	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and...	7/10/2025, 12:33 PM	Lightning	✓
20	Sales Cloud Mobile	SalesCloudMobile	New seller focused mobile first experience	7/10/2025, 12:33 PM	Lightning	✓
21	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on...	7/10/2025, 12:33 PM	Lightning	✓
22	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	7/10/2025, 12:33 PM	Classic	✓
23	Salesforce Scheduler ...	LightningScheduler	Set up personalized appointment scheduling.	7/10/2025, 12:37 PM	Lightning	✓
24	Service	Service	Manage customer service with accounts, contacts, cases, and more	7/10/2025, 12:33 PM	Classic	✓
25	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple recor...	7/10/2025, 12:33 PM	Lightning	✓

Creation of Relationship Fields in Salesforce Objects

1. Lookup Relationship on Volunteer Object
 - Path: Setup → Object Manager → Volunteer → Fields & Relationships → New
 - Type: Lookup Relationship
 - Related Object: Drop-Off Point
 - Field Name: Drop_Off_point
 - Label: Auto-generated
 - Click Next → Next → Save
2. Master-Detail Relationship on Execution Details (to Volunteer)
 - Path: Setup → Object Manager → Execution Details → Fields & Relationships → New
 - Type: Master-Detail Relationship
 - Related Object: Volunteer
 - Field Name: Volunteer
 - Label: Auto-generated
 - Click Next → Next → Save
3. Master-Detail Relationship on Execution Details (to Task)
 - Path: Setup → Object Manager → Execution Details → Fields & Relationships → New
 - Type: Master-Detail Relationship
 - Related Object: Task • Field Name: Task
 - Label: Auto-generated • Click Next → Next → Save
4. Lookup Relationship on Drop-Off Point (to Venue)
 - Path: Setup → Object Manager → Drop-Off Point → Fields & Relationships → New
 - Type: Lookup Relationship
 - Related Object: Venue
 - Field Name: Venue
 - Label: Venue__c
 - Click Next → Next → Save
5. Lookup Relationship on Task (to Venue)
 - Path: Setup → Object Manager → Task → Fields & Relationships → New
 - Type: Lookup Relationship
 - Related Object: Venue
 - Field Name: Sponsored By
 - Label: Auto-generated
 - Click Next → Next → Save
6. Lookup Relationship on Task (to Drop-Off Point)
 - Path: Setup → Object Manager → Task → Fields & Relationships → New
 - Type: Lookup Relationship
 - Related Object: Drop-Off Point
 - Field Name: Drop-Off point
 - Label: Auto-generated

- Click Next → Next → Save



PHASE Creation of Fields in Venue Object

1. Create Email Field

- Navigation:

Setup → Object Manager → Venue → Fields & Relationships → New

- Data Type: Email

- Field Label: Contact Email

- Field Name: Auto-populated

- Required: Checked

- Click Next → Next → Save & New

2. Create Phone Field

- Navigation: Setup → Object Manager → Venue → Fields & Relationships → New

- Data Type: Phone

- Field Label: Contact Phone

- Field Name: Auto-populated

- Required: Checked

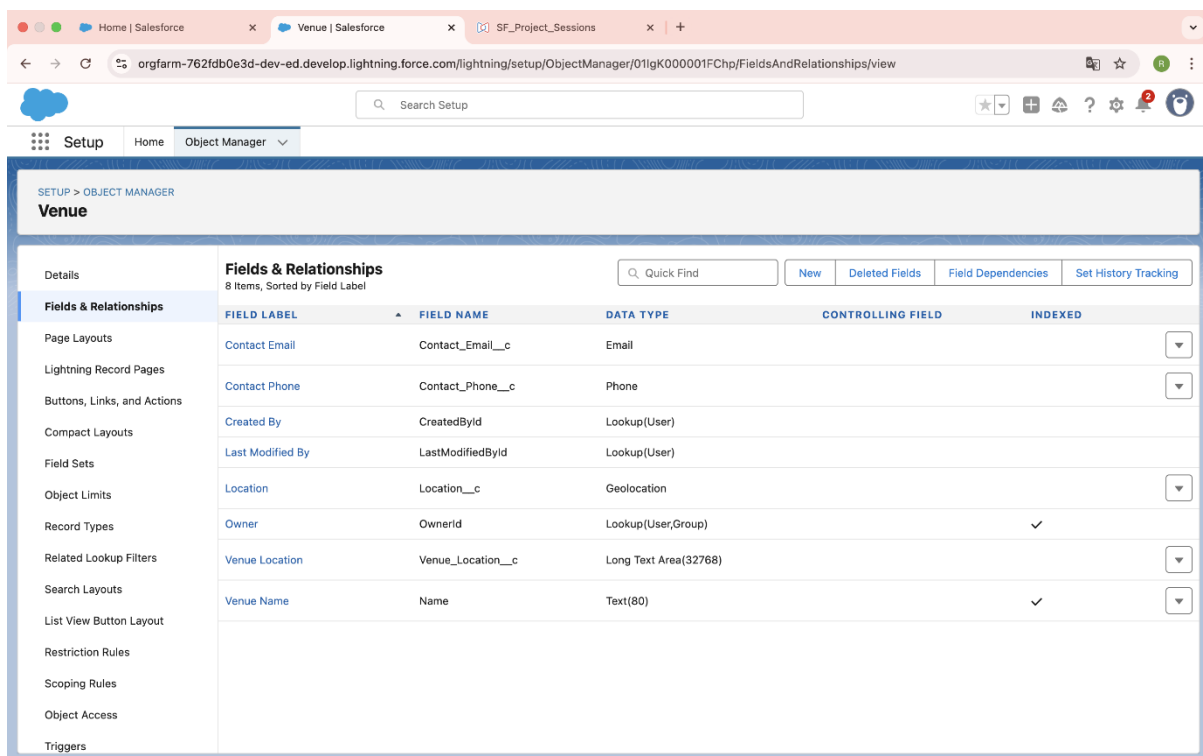
- Click Next → Next → Save & New

3. Create Geolocation Field

- Navigation: Setup → Object Manager → Venue → Fields & Relationships → New
- Data Type: Geolocation
- Field Label: Location
- Decimal Places: 4
- Field Name: Auto-populated
- Description: Enter the Geolocation of your Venue
- Click Next → Next → Save & New

4. Create Long Text Area Field

- Navigation: Setup → Object Manager → Venue → Fields & Relationships → New
- Data Type: Long Text Area
- Field Label: Venue Location
- Field Name: Venue_Location
- Click Next → Next → Save



The screenshot shows the Salesforce Setup interface. The breadcrumb trail is: SETUP > OBJECT MANAGER > Venue. The left sidebar contains a list of setup categories: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, and Triggers. The main content area is titled 'Fields & Relationships' and shows a table of 8 items, sorted by Field Label. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The items listed are: Contact Email (Email), Contact Phone (Phone), Created By (Lookup(User)), Last Modified By (Lookup(User)), Location (Geolocation), Owner (Lookup(User,Group)), Venue Location (Long Text Area(32768)), and Venue Name (Text(80)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Contact Email	Contact_Email__c	Email		
Contact Phone	Contact_Phone__c	Phone		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Geolocation		
Owner	OwnerId	Lookup(User,Group)		✓
Venue Location	Venue_Location__c	Long Text Area(32768)		
Venue Name	Name	Text(80)		✓

Creation of Fields in Drop-Off Point Object

1. Geolocation Field – Location 2

- Navigation: Setup → Object Manager → Drop-Off Point → Fields & Relationships → New
- Data Type: Geolocation
- Field Label: Location 2
- Field Name: Auto-generated
- Description: Enter the Geolocation of the Drop off Point
- Geolocation Option: Decimal
- Decimal Places: 4
- Click Next → Next → Save & New

2. Formula Field – Distance Calculation

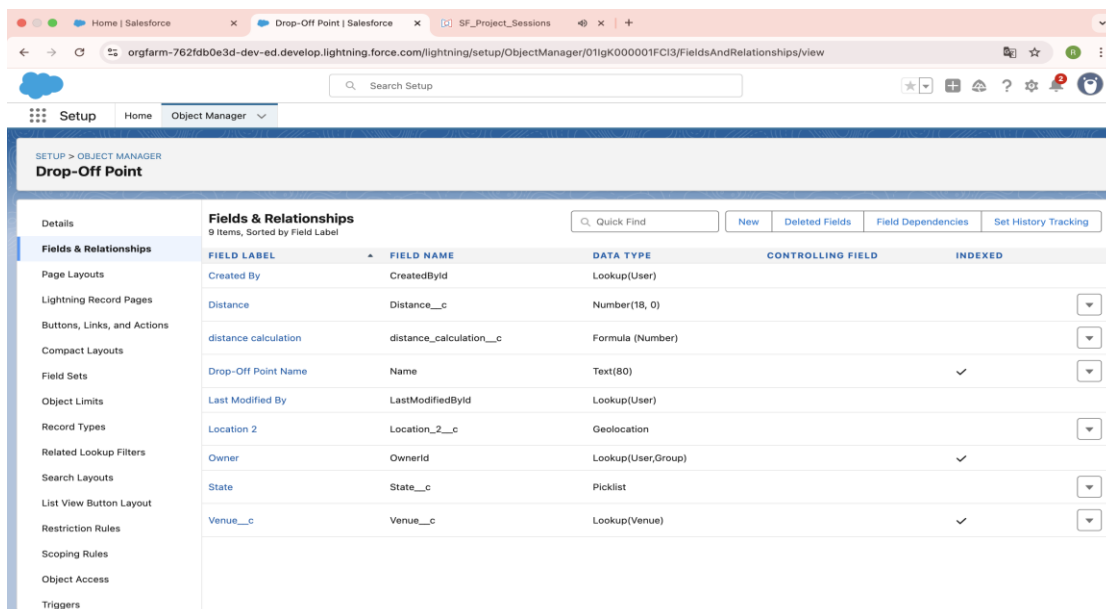
- Navigation:

Setup → Object Manager → Drop-Off Point → Fields & Relationships → New

- Data Type: Formula
- Field Label: distance calculation
- Field Name: distance_calculation
- Formula Return Type: Number
- Formula: scss CopyEdit DISTANCE (Location_2__c, Venue__r.Location__c, "km")
- Click Next → Next → Save & New

3. Picklist Field – State

- Navigation: Setup → Object Manager → Drop-Off Point → Fields & Relationships → New
- Data Type: Picklist
- Field Label: State
- Field Name: State
- Values (one per line): Puducherry (UT)
- Required: Checked
- Click Next → Next → Save & New Creation of Field in Task Object Number Field – Distance
- Navigation: Setup → Object Manager → Task → Fields & Relationships → New
- Data Type: Number
- Field Label: Distance
- Field Name: Distance
- Length: 14
- Decimal Places: 4
- Required: Checked
- Click Next → Next → Save



The screenshot shows the Salesforce Setup interface for the 'Drop-Off Point' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Created By, Distance, distance calculation, Drop-Off Point Name, Last Modified By, Location 2, Owner, State, and Venue__c.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Distance	Distance__c	Number(18, 0)		
distance calculation	distance_calculation__c	Formula (Number)		
Drop-Off Point Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Location 2	Location_2__c	Geolocation		
Owner	OwnerId	Lookup(User,Group)		✓
State	State__c	Picklist		
Venue__c	Venue__c	Lookup(Venue)		✓

Creation of Fields in Task Object

1. Auto Number Field – Task ID

- Navigation:

Setup → Object Manager → Task → Fields & Relationships → New

- Data Type: Auto Number
- Field Label: Task ID
- Display Format: TASK-{0}
- Starting Number: 1
- Required: Checked
- Click Next → Next → Save & New

2. Date Field – Date

- Data Type: Date
- Field Label: Date
- Field Name: Date
- Required: Checked
- Click Next → Next → Save & New

3. Picklist (Multi-Select) – Food Category

- Data Type: Picklist (Multi-Select)
- Field Label: Food Category
- Field Name: Food_Category
- Picklist Values:
- Required: Checked
- Click Next → Next → Save & New

4. Number Field – Number of People Served

- Data Type: Number
- Field Label: Number of People Served
- Field Name: Number_of_People_Served
- Required: Checked
- Click Next → Next → Save & New

5. Text Field – Name of the Person

- Data Type: Text
- Field Label: Name of the Person
- Field Name: Name_of_the_Person
- Click Next → Next → Save & New

6. Phone Field – Phone

- Data Type: Phone
- Field Label: Phone
- Field Name: Phone
- Click Next → Next → Save & New

7. Picklist Field – Rating • Data Type: Picklist

- Field Label: Rating
- Field Name: Rating
- Picklist Values:
- Click Next → Next → Save & New

8. Long Text Area – Feedback

- Data Type: Long Text Area
- Field Label: Feedback

- Field Name: Feedback
- Click Next → Next → Save

SETUP > OBJECT MANAGER
Task

Details

Fields & Relationships
15 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Date	Date__c	Date		
Distance	Distance__c	Number(14, 4)		
Drop-Off Point	Drop_Off_Point__c	Lookup(Drop-Off Point)		✓
Feedback	Feedback__c	Long Text Area(32768)		
Food Category	Food_Category__c	Picklist (Multi-Select)		
Last Modified By	LastModifiedById	Lookup(User)		
Name of the Person	Name_of_the_Person__c	Text(100)		
Number of People Served	Number_of_People_Served__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		

Creation of Fields in Execution Details Object

1. Auto Number – Execution ID

Go to:

Setup → Object Manager → Search for Execution Details

Steps:

1. Click on Fields & Relationships → New
2. Choose Data Type: Auto Number → Click Next
3. Field Label: Execution ID
4. Field Name: (Auto-generated)
5. Check the Required box
6. Click Next → Next → Save & New

SETUP > OBJECT MANAGER

Execution Detail

Details

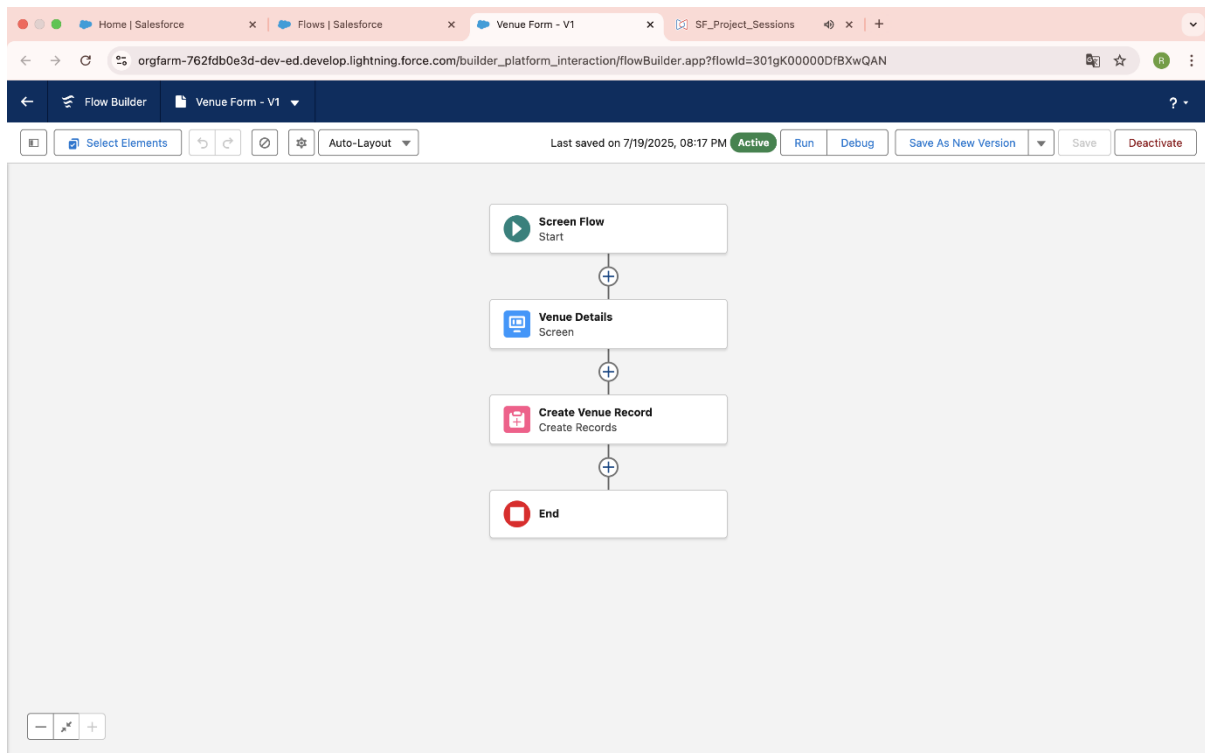
Fields & Relationships
6 Items, Sorted by Field Label

Quick Find: New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Execution Detail Name	Name	Text(80)		✓
Execution ID	Execution_ID__c	Auto Number		
Last Modified By	LastModifiedBy	Lookup(User)		
Task	Task__c	Master-Detail(Task)		✓
Volunteer	Volunteer__c	Master-Detail(Volunteer)		✓

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.



PHASE 1: REQUIREMENT ANALYSIS & PLANNING

Understanding Business Requirements:

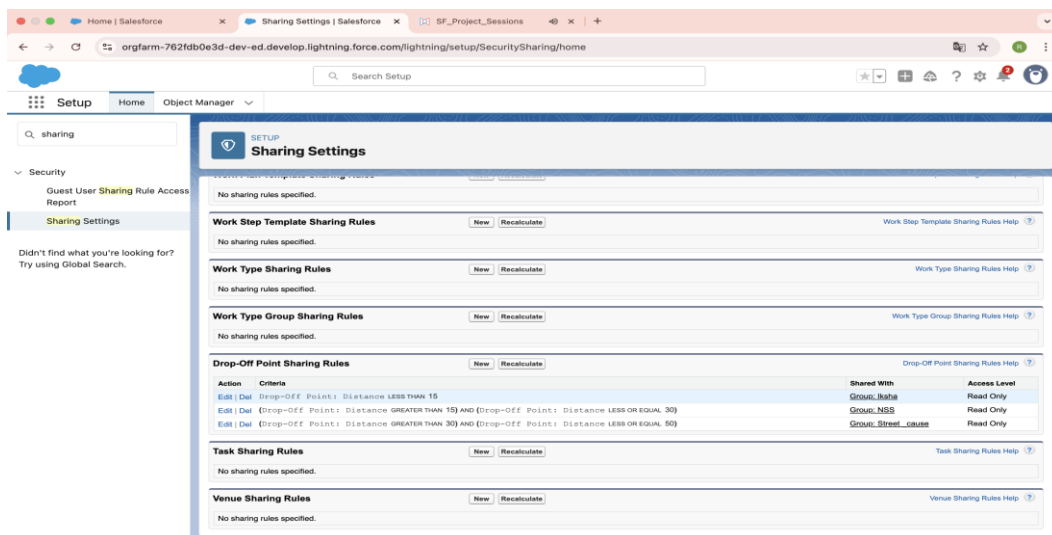
- NGOs need a system to track food pick-up and drop-off points.
- Volunteers should be assigned automatically depending on their location.
- The system should provide live updates about tasks and volunteers.
- Managers should have dashboards to easily check distribution progress.

Defining Project Scope and Objectives:

- I included custom objects for **Venues**, **Drop-Off Points**, **Volunteers**, **Tasks**, and **Execution Details**.
- I planned for user management using **Profiles** and **Public Groups**.
- Created reports and dashboards for simple monitoring.
- Added sharing rules to limit data access based on distance.
- Built automation using Flows and validation rules for efficiency.

Design Data Model and Security Model:

- **Data Model:** Custom objects connected through Lookup and Master-Detail relationships.
- **Security Model:**
 - Custom **NGOs Profile** for users.
 - Simple hierarchy using **Public Groups**.
 - **Sharing Rules** to give access based on drop-off location distance.



The screenshot shows the Salesforce 'Sharing Settings' page. The left sidebar contains a search bar with 'sharing' and a list of navigation items: Setup, Home, Object Manager, Security, Guest User Sharing Rule Access Report, and Sharing Settings (highlighted). The main content area is titled 'Sharing Settings' and lists several sharing rule categories, each with a 'New' button, a 'Recalculate' button, and a help link:

- Work Step Template Sharing Rules:** No sharing rules specified.
- 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 three rows of rules.
- Task Sharing Rules:** No sharing rules specified.
- Venue Sharing Rules:** No sharing rules specified.

Action	Criteria	Shared With	Access Level
Edit Del	Drop-Off Point: Distance LESS THAN 15	Group: Staff	Read Only
Edit Del	(Drop-Off Point: Distance GREATER THAN 15) AND (Drop-Off Point: Distance LESS OR EQUAL 30)	Group: NSS	Read Only
Edit Del	(Drop-Off Point: Distance GREATER THAN 30) AND (Drop-Off Point: Distance LESS OR EQUAL 50)	Group: Street_cause	Read Only

PHASE 2: SALESFORCE DEVELOPMENT – BACKEND & CONFIGURATIONS

Setup Environment & Deployment:

- I used a **Developer Org** for building and testing.
- Moved everything to production using **Change Sets**.

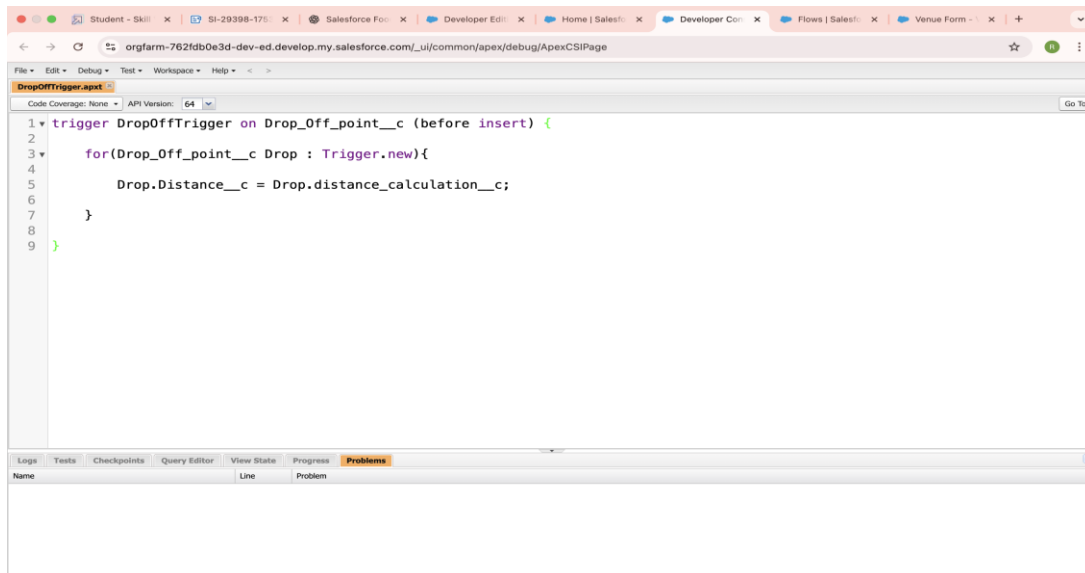
Objects, Fields, and Automation:

- Created all necessary objects with custom fields like Distance and Ratings.
- Added validation rules to prevent errors during record creation.
- Built **Flows** to assign volunteers and create tasks automatically.

Apex and Triggers:

- Only used one simple trigger for setting distance values.
- No complex Apex classes were needed in this project.

Apex and Triggers:



PHASE 3: UI/UX DEVELOPMENT & CUSTOMIZATION

Lightning App:

- Made a **Lightning App** called **FoodConnect** with all important tabs.

Page Layouts:

- Adjusted page layouts to make sure every record shows the right information.
- Added related lists to connect venues, tasks, and volunteers.

User Management:

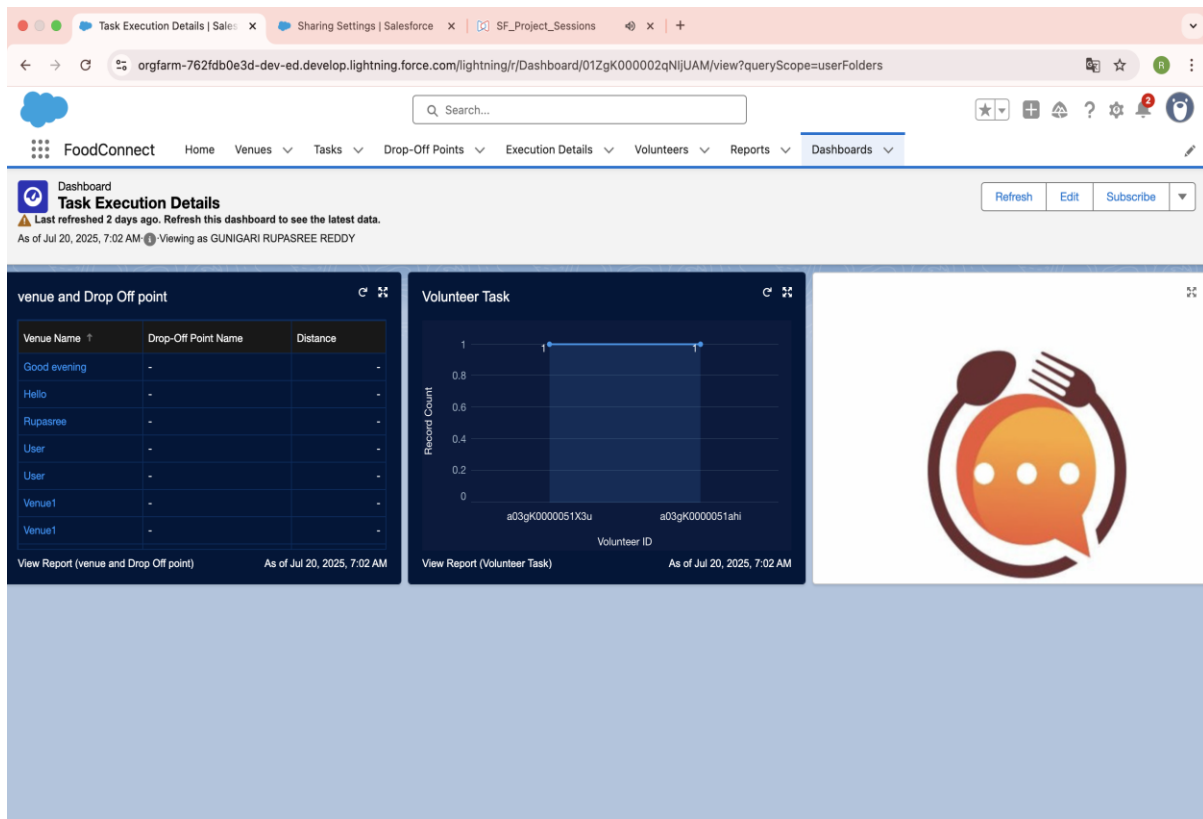
- Created different NGO users with the **NGOs Profile**.
- Grouped users in **Public Groups** like Iksha, NSS, and Street Cause.

The screenshot shows the Salesforce Setup interface for User Management. The left sidebar contains navigation links for Setup, Home, Object Manager, and a search bar. The main content area is titled 'All Users' and includes a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are Chatter Expert, EPIC_OrgFarm, Iksha_Foundation, NSS_Nss, REDDY_GUNIGARI RUPASREE, Street_cause_Street_cause, User_Integration, and User_Security. The table also includes buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty00dpk000007arzuu4.gkijra85oyl@chatter.salesforce.com	Chatter Free User	✓	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIK	epic09a5da49839@orgfarm.salesforce.com	System Administrator	✓	System Administrator
<input type="checkbox"/> Edit	Iksha_Foundation, Iksha Foundation	iksh	rupasreegunigari@28.com	NGOs Profile	✓	NGOs Profile
<input type="checkbox"/> Edit	NSS_Nss	nss	rupasreegunigari@25.com	NGOs Profile	✓	NGOs Profile
<input type="checkbox"/> Edit	REDDY_GUNIGARI RUPASREE	gun	gunigari229@agentforce.com	System Administrator	✓	System Administrator
<input type="checkbox"/> Edit	Street_cause_Street_cause	ssre	rupasreegunigari@02.com	NGOs Profile	✓	NGOs Profile
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dpk000007arzuu4.com	Analytics Cloud Integration User	✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightsecurity@00dpk000007arzuu4.com	Analytics Cloud Security User	✓	Analytics Cloud Security User

Reports and Dashboards:

- Built two report types:
 - **Venue with Drop-Off and Volunteers**
 - **Volunteers with Tasks and Execution Details**
- Designed dashboards to track volunteers and food deliveries.

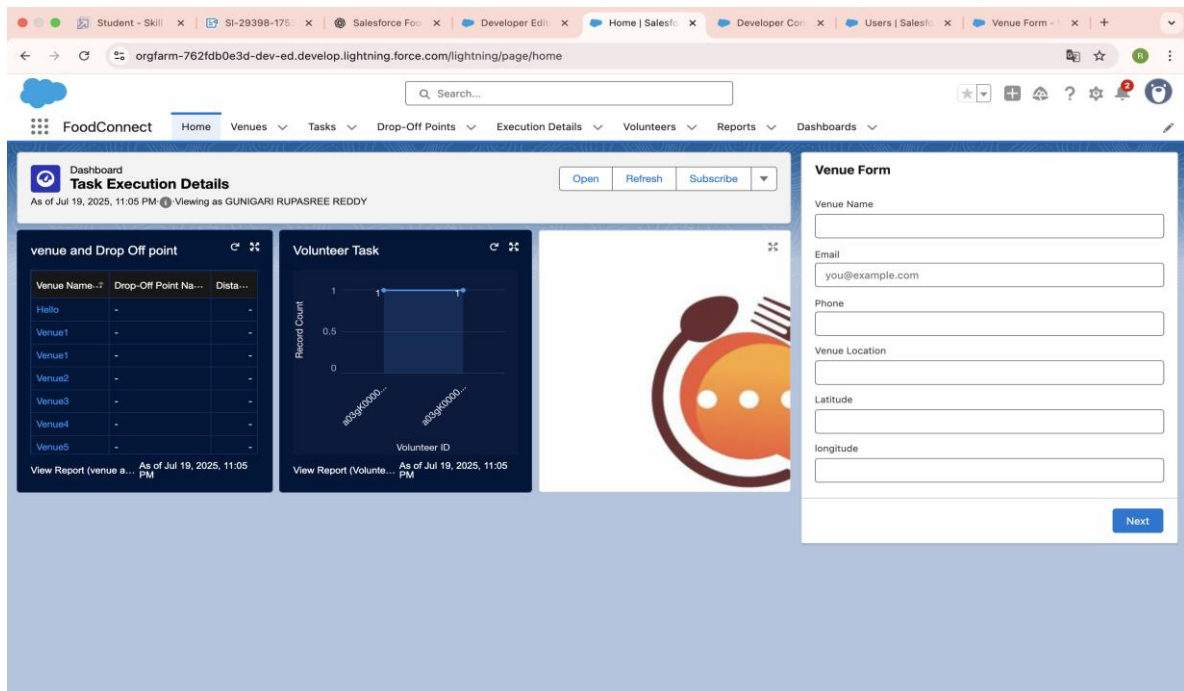


LWC Development:

- I didn't use Lightning Web Components (LWC) for this project.

Lightning Pages:

- Customized **Lightning Pages** by adding flows and dashboards to the Home Page.



PHASE 4: DATA MIGRATION, TESTING & SECURITY

Data Importing:

- Used **Data Import Wizard** for small records.
- Used **Data Loader** for bulk uploads.

Data Quality and Protection:

- Enabled **Field History Tracking**.
- Set up **Duplicate Rules** on Volunteer emails.
- Created **Sharing Rules** based on distance.

Test Classes:

- I did not need test classes since I used Flows, not complex code.
- Manually tested all flows, tasks, and reports:
 - Volunteer gets assigned correctly
 - Tasks are auto-created
 - Reports show accurate data
- Verified dashboards after every update.

PHASE 5: DEPLOYMENT, DOCUMENTATION & MAINTENANCE

Deployment:

- Used **Outbound Change Sets** to move from Sandbox to Production.

Maintenance:

- Admin is responsible for:
 - Monitoring users
 - Checking reports
 - Updating records regularly

Troubleshooting:

- Used **Debug Logs** and error paths in Flows to solve issues quickly.
- Kept a record of updates using **Setup Audit Trail**.

CONCLUSION

The FoodConnect CRM I developed provides a simple and organized solution for managing food donations by bringing together NGOs, volunteers, venues, and drop-off points in a single Salesforce platform. It helped automate volunteer assignments, track food delivery tasks, and generate real-time reports and dashboards, making the donation process faster and more efficient. By implementing custom objects, flows, and sharing rules, the system ensures better coordination, reduces manual work, and supports timely food distribution to those in need. This project also allows future upgrades like mobile access, AI-based volunteer matching, and advanced reporting features.