



**Project Title** Project to Supply Leftover Food to the Poor Using Salesforce

**Submitted by**

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## **1. Project Overview**

This project addresses the challenge of food waste and hunger by leveraging Salesforce technology to facilitate the distribution of surplus food to those in need. Through this solution, we aim to efficiently connect donors, such as restaurants and grocery stores, with organizations that assist the needy. Utilizing Salesforce CRM as the core platform, the project enables real-time tracking of donations, manages logistics, and ensures timely delivery. This initiative promotes transparency, accountability, and improved resource allocation within the network of food donors and recipients.

### **1. Objectives**

- a. **Business Goals:** Reduce food waste and combat hunger by connecting food suppliers with non-profits and shelters.
- b. **Specific Outcomes:**
  - Establish a reliable network of food donors and recipients.
  - Automate the matching process of food donations based on location, food type, and urgency.
  - Enable field agents to track deliveries and update statuses in real-time.

## 1. Salesforce Key Features and Concepts Utilized

- a. **Objects:** Custom objects created for Drop-Off Points, Tasks, Execution Details, Volunteers, and Venues to manage data specific to the project.
- b. **Tabs:** Custom tabs for key objects like Venues, Execution Details, and Volunteers, improving data organization and accessibility.
- c. **Lightning App:** Built for a smooth and user-friendly interface.
- d. **Fields:** Custom fields for storing detailed information about tasks, volunteer details, and drop-off points.
- a. **Flows:** Automated workflows for creating records and notifying users.
- b. **Triggers:** Apex triggers to enforce business logic and ensure data consistency.
- c. **Profiles and Users:** Defined specific roles and access levels to secure and organize data handling.
- d. **Public Groups:** Grouped users for simpler sharing and permissions management.
- e. **Report Types:** Created to facilitate custom reporting and track metrics like volunteer efficiency and food distribution effectiveness.
- f. **Dashboards:** Visual representation of key metrics, enabling better decision-making and operational insights.
- g. **Sharing Rules:** Used to extend access to records for users in public groups, ensuring secure and organized data sharing across the system.

## 2. Detailed Steps to Solution Design

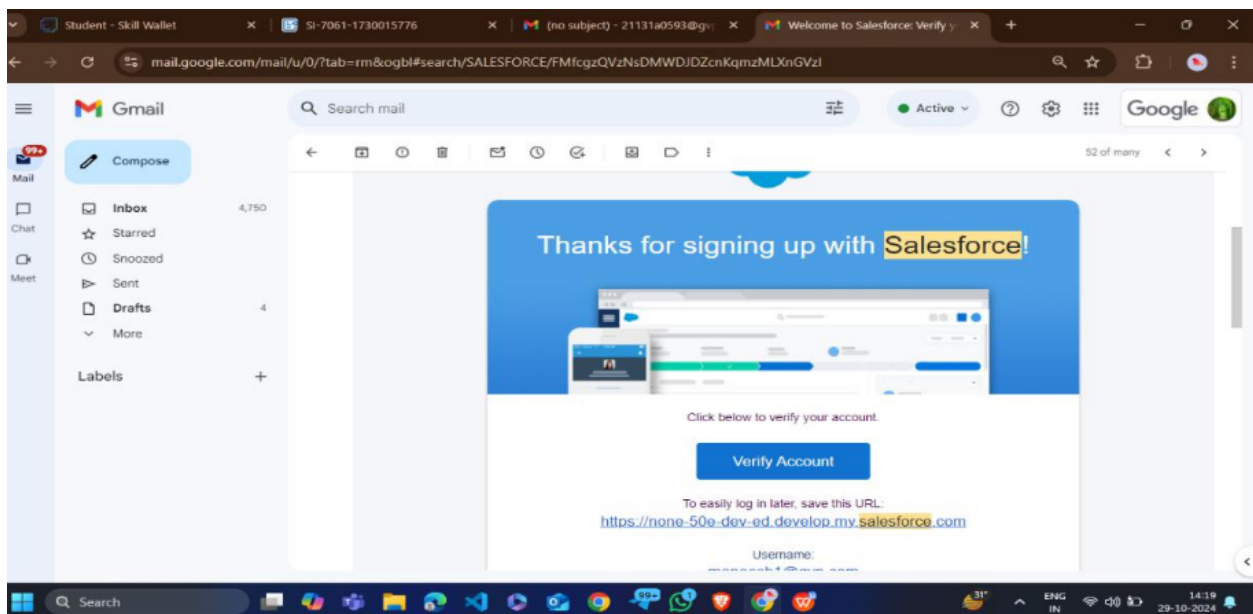
The solution design involved creating custom objects, fields, tabs, and lightning applications to

build a user-friendly interface. Each object was carefully tailored to meet the unique data requirements for the project:

1. **Data Model:** Custom objects (Drop-Off Points, Volunteers, etc.) organized data effectively, while relationships between objects streamlined the distribution workflow.
2. **User Interface:** Custom tabs and Lightning components facilitated easy access to information, optimized for mobile use.
3. **Business Logic:** Flows and triggers automated donation alerts, assignment of volunteers, and tracking of delivery updates to ensure a smooth process.

### salesforce developer account creation

1. Creating a developer org in salesforce
2. Account Activation



### Object

In Salesforce, an object is a database table that stores data related to a specific entity, such as customers, products, or sales transactions. Objects are the building blocks of Salesforce data models.

There are two types of objects in Salesforce:

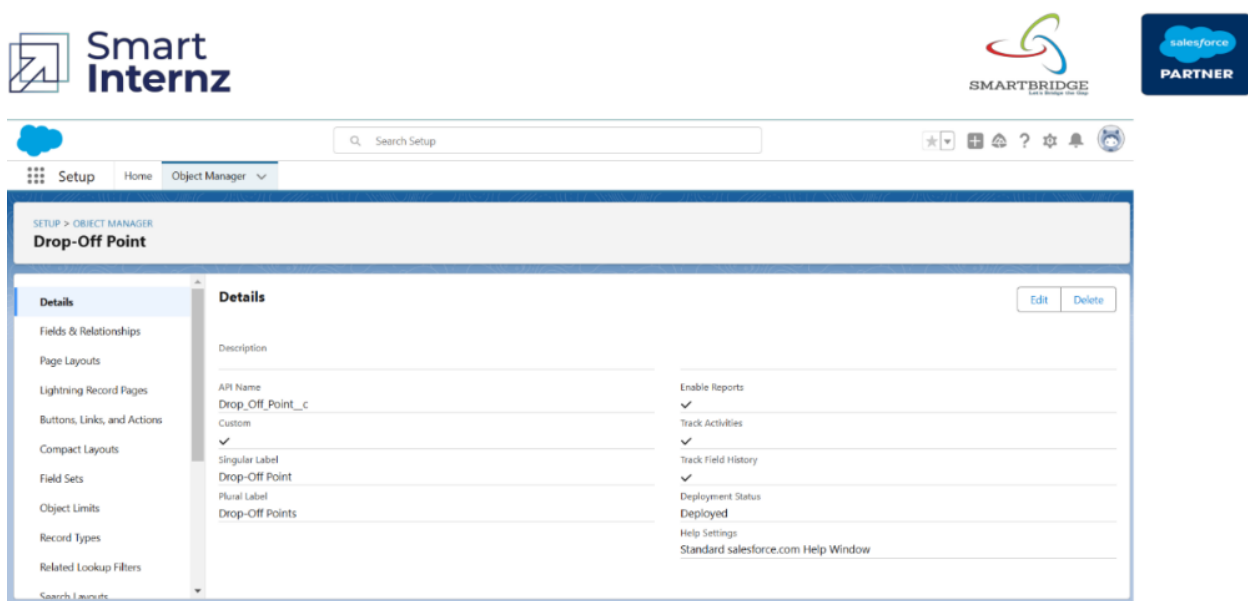
1. **Standard Objects:** These are pre-built objects provided by Salesforce, such as Accounts, Contacts, Leads, and Opportunities, which cover common business processes.
2. **Custom Objects:** These are user-defined objects created to store data unique to a particular business or application. Custom objects can have custom fields, relationships, and custom logic through workflows and triggers.

Objects are essential for organizing and managing data within the Salesforce platform.

To create an object:

Here, We have Created All the objects which where asked.

#### a. Drop-Off Point



## b. Task

The screenshot shows the Salesforce Setup interface for the 'Task' object. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and several utility icons. Below the navigation bar, the 'Setup' menu is open, showing 'Home' and 'Object Manager'. The 'Object Manager' section is selected, and the 'Task' object is highlighted. The main content area is titled 'Task' and contains a 'Details' section. On the left, a sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The 'Details' section on the right contains the following fields:

Details	
Description	
API Name	Task_c
Custom	✓
Singular Label	Task
Plural Label	Tasks
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the top right of the details section, there are 'Edit' and 'Delete' buttons. At the bottom left of the sidebar, there is a 'Search Layouts' link.

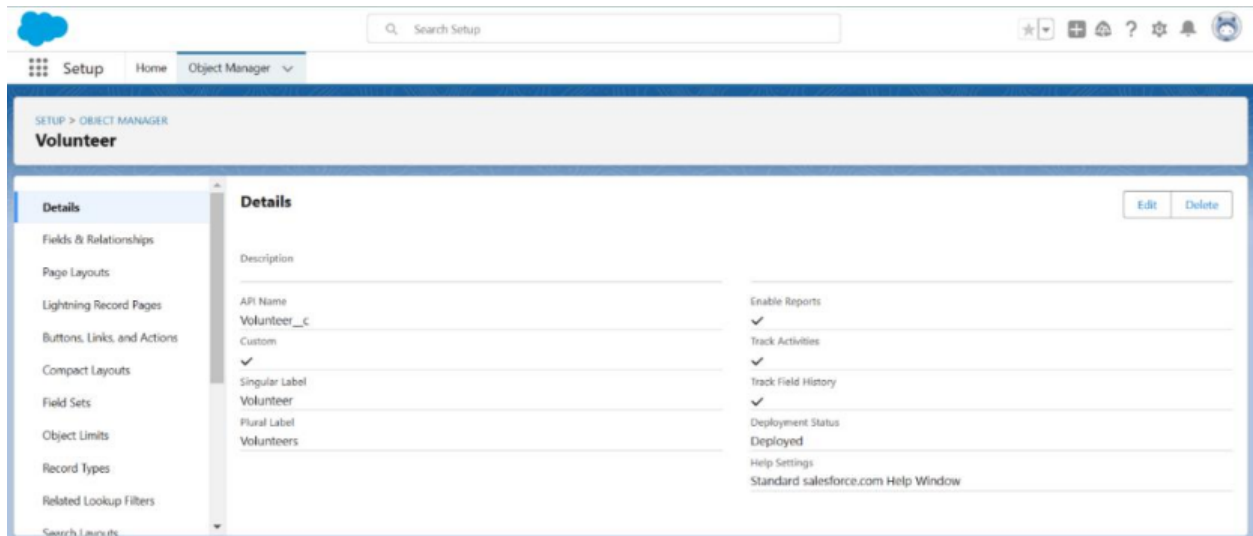
## c. Execution Detail

The screenshot shows the Salesforce Setup interface for the 'Execution Detail' object. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and several utility icons. Below the navigation bar, the 'Setup' menu is open, showing 'Home' and 'Object Manager'. The 'Object Manager' section is selected, and the 'Execution Detail' object is highlighted. The main content area is titled 'Execution Detail' and contains a 'Details' section. On the left, a sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The 'Details' section on the right contains the following fields:

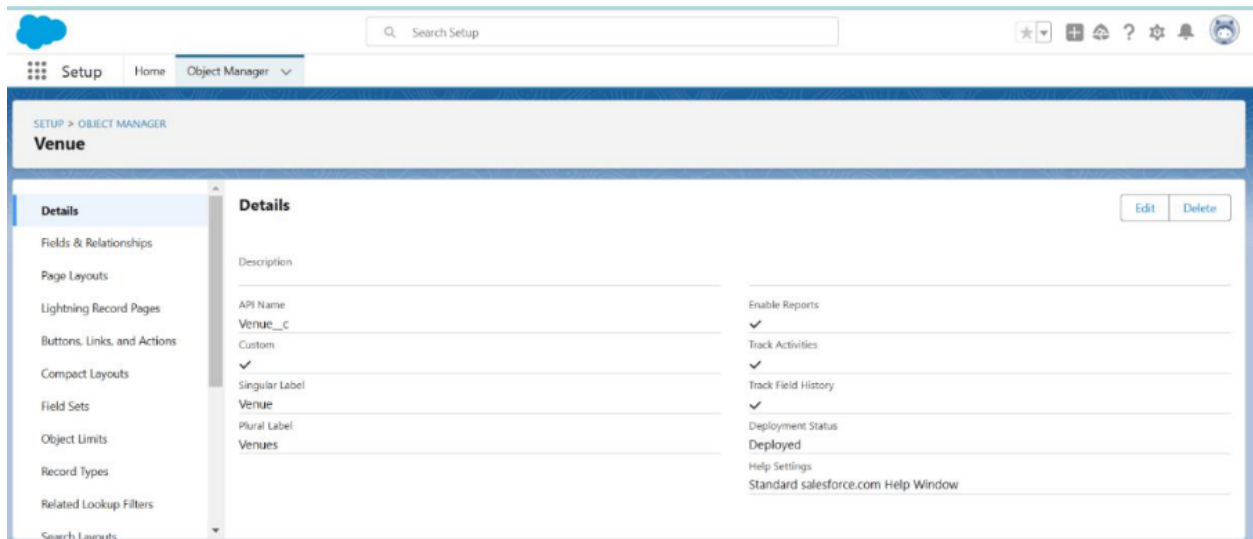
Details	
Description	
API Name	Execution_Detail_c
Custom	✓
Singular Label	Execution Detail
Plural Label	Execution Details
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the top right of the details section, there are 'Edit' and 'Delete' buttons. At the bottom left of the sidebar, there is a 'Search Layouts' link.

## d. Volunteer



## e. Venue



## Tab:

What is Tab ?




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


### a. Creating a Custom

#### Tab Create Venues

#### Tab

## 2. Drop-Off Point Tab





Setup

Home

Object Manager

Q tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for? Try using Global Search.

SETUP

Tabs

Custom Object Tab

Drop-Off Points

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Tab Label

Drop-Off Points

Tab Style

Boat

Object

Drop-Off Point

Splash Page Custom Link

Description


Created By

KEMBURU VENKAT MANEESH 26/10/2024, 3:52 pm

Modified By

KEMBURU VENKAT MANEESH 26/10/2024, 3:52 pm

## II) Execution Details Tab



Setup

Home

Object Manager

Q tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for? Try using Global Search.

SETUP

Tabs

Custom Object Tab

Execution Details

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Tab Label

Execution Details

Tab Style

Boat

Object

Execution Detail

Splash Page Custom Link

Description

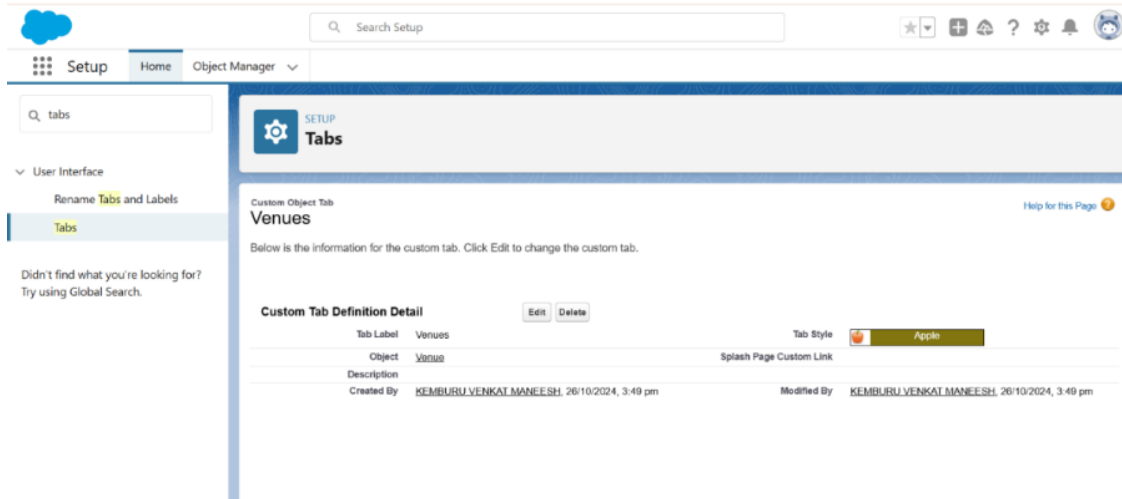
Created By

KEMBURU VENKAT MANEESH 26/10/2024, 3:53 pm

Modified By

KEMBURU VENKAT MANEESH 26/10/2024, 3:53 pm

## III) Venues Tab



Search Setup

Setup Home Object Manager

Q tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for? Try using Global Search.

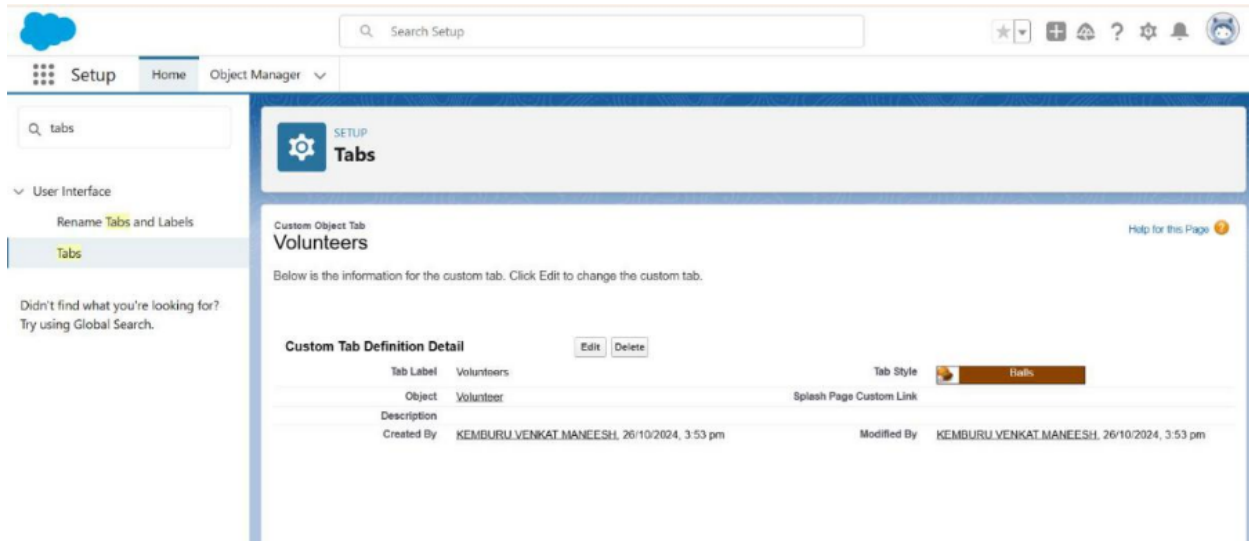
Custom Object Tab Venues [Help for this Page](#)

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail [Edit](#) [Delete](#)

Tab Label	Venues	Tab Style	Apple
Object	Venue	Splash Page Custom Link	
Description			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 3:49 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 3:49 pm

#### IV) Volunteers Tab



Search Setup

Setup Home Object Manager

Q tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for? Try using Global Search.

Custom Object Tab Volunteers [Help for this Page](#)

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail [Edit](#) [Delete](#)

Tab Label	Volunteers	Tab Style	Balls
Object	Volunteer	Splash Page Custom Link	
Description			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 3:53 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 3:53 pm

#### 4. Create a Lightning App

Will create a lightning app page-



## **5)Fields**

### **What is a Field?**

Fields are specific data points within an object where individual pieces of information are stored. They are akin to columns in a database table and can hold various types of data, such as text, numbers, or dates.

### **Creation of Fields for the Volunteer Object - Gen**

**Execution ID**

**Date of birth**

**Addresss**

**Age**

**Avaialble On**

**Drop\_off\_point**

**Volunteer ID**

**Creation of Fields for the Venue Object**

**Contact Email**

**Contact Phone**

**Location**

**Venue Location**

**Creation of Fields for the Drop-Off Point Object**

**Location**

**distance Calculation**

**Creation of Fields for the Task Object**

**Venue\_c**



**Feedback**

**Rating**

**Sponsored By**

**Task Name**

**Task ID**

**Phone**

**Number of People Served**

**Food Category**

**Date**

**Creation of Fields for the Execution Details Object**

**Volunteer**

## **Task**

### **6) Flows**

#### **What is a Flow?**

Flows are automation tools that allow users to create complex business processes and workflows using a visual interface. They can automate tasks, guide users through steps, and integrate with other systems.

#### **Flow to Create a Record in Venue Object**

