Title: FoodConnect CRM

Subtitle: Supplying Leftover Food to the Poor through Salesforce CRM

Presented by: Battala Kalyani

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Project Overview:

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Food Connect CRM is a cloud-based Customer Relationship Management (CRM) solution built on Salesforce, designed specifically for managing food donation and distribution. The system acts as a bridge between NGOs, volunteers, donors, and distribution venues, ensuring that surplus food is collected, stored, and delivered to those in need in a systematic and transparent way.Traditionally, managing food donations has been a manual and disorganized process. Donors may not know where to send surplus food, NGOs may struggle to allocate volunteers, and there is often little to no visibility on how much food has been distributed. FoodConnect CRM eliminates these inefficiencies by providing a centralized, automated, and transparent platform.

- **Key business needs addressed by FoodConnect CRM:**

Surplus food donation tracking from different venues.

Drop-off point management where donated food is stored temporarily.

Volunteer coordination and task assignment.Capturing execution details such as date, time, and location of food delivery.Monitoring NGO participation and impact.The core functionality is powered by Salesforce features such as Custom Objects (Venue, Drop-Off Point, Task, Volunteer, Execution Details), Automation (Flows, Validation Rules, Triggers), and Reporting Tools (Reports and Dashboards).

- **Objectives**

The primary objective of FoodConnect CRM is to create a digitized platform for food donation

management that enhances efficiency, transparency, and collaboration among all stakeholders.
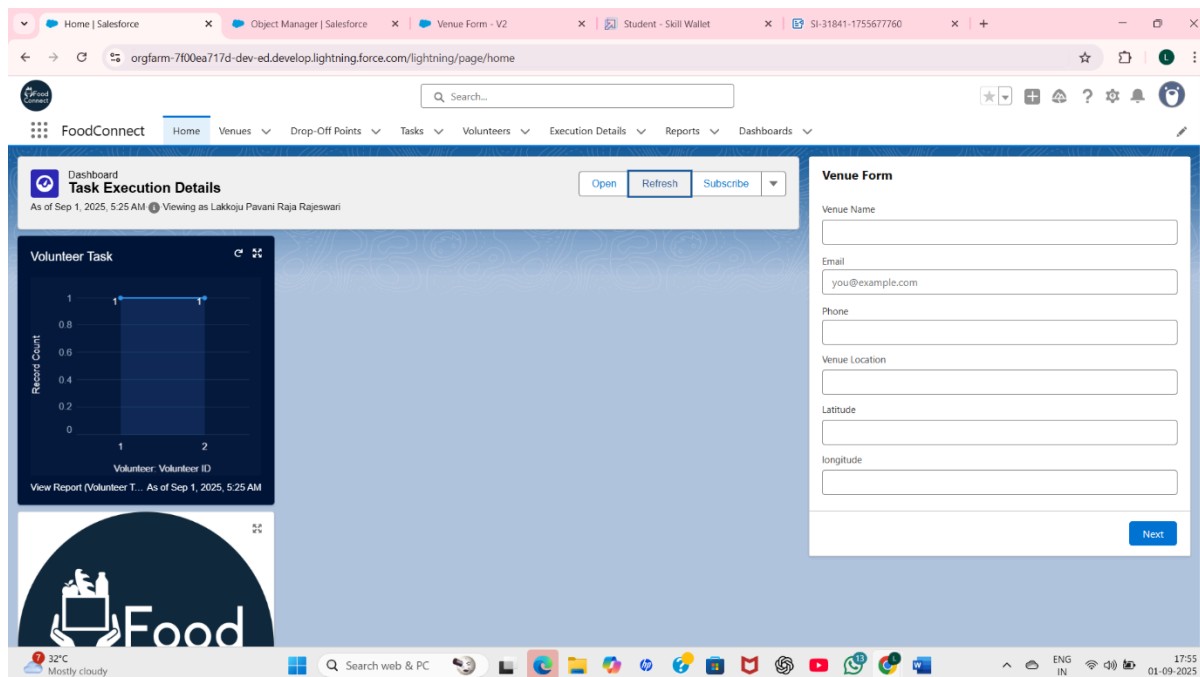
- **Detailed objectives include:**

Automate food donation management Reduce manual record-keeping.Automatically assign tasks and calculate logistics (like distance to venues and drop-off points).Enable effective collaboration between NGOs and volunteers NGOs can create drop-off points and tasks.Volunteers can view their assigned responsibilities and update execution details.Provide transparency with reports and dashboards Custom reports for tracking donations, volunteer contributions, and NGO performance.Dashboards offering real-time insights into ongoing activities.Improve decision-making through data analyticsIdentify areas with recurring food shortages.Optimize volunteer distribution.Plan for future donation drives with predictive insights.

- **Requirement Analysis & Planning**

✓ Business Requirements

Capture details of food surplus from various venues (restaurants, event halls, etc.).

Create drop-off points where food can be collected and stored.

Allocate volunteers for pickup, storage, and delivery tasks.

Record execution details like completion time, delivery address, and associated NGO.

✓ Project Scope

The FoodConnect CRM project includes the full lifecycle of food donation management, from donation

request creation to volunteer assignment, tracking execution, and generating reports for performance analysis.

✓ Data Model

The data model was designed with five major objects:

Venue – Source of food donations.

Drop-Off Point – Intermediate collection point.

Task – Activity assigned to volunteers.

Volunteer – Individual handling logistics.

Execution Details – Record of completed activities.

These objects are linked using lookup and master-detail relationships, ensuring data consistency.

✓ Security Model

Profiles & Roles – Admin, NGO, Volunteer.

Sharing Rules – Access controlled based on NGO and location.

Public Groups – To allow collaboration between NGOs.

Stakeholders

NGOs (Shisha Foundation, NSS, Street Cause).

Volunteers.

Administrators overseeing the process.

- **Roadmap**

Requirement Gathering → Development → Testing → Deployment → Maintenance.

- **Salesforce Development – Backend & Configurations**

In this phase, the core system was developed in Salesforce.

Environment Setup Salesforce Developer Organization was provisioned.

Food Connect CRM app was created as a Lightning App.

➤ **Custom Objects**

✓ Venue

✓ Drop-Off Point

✓ Task

Task

SETUP > OBJECT MANAGER
Task

Details	Details	Edit	Delete

Description

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

Left navigation:
- 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

✓ Volunteer

SETUP > OBJECT MANAGER
Volunteer

Details	Details	Edit	Delete

Description

API Name	Enable Reports
Volunteer__c	✓
Custom	Track Activities
✓	✓
Singular Label	Track Field History
Volunteer	✓
Plural Label	Deployment Status
Volunteers	Deployed
	Help Settings
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✓ Execution Details

- **Fields & Relationships**

Lookup Relationships (Volunteer ↔ Task).

Master-Detail Relationships (Drop-Off ↔ Venue)
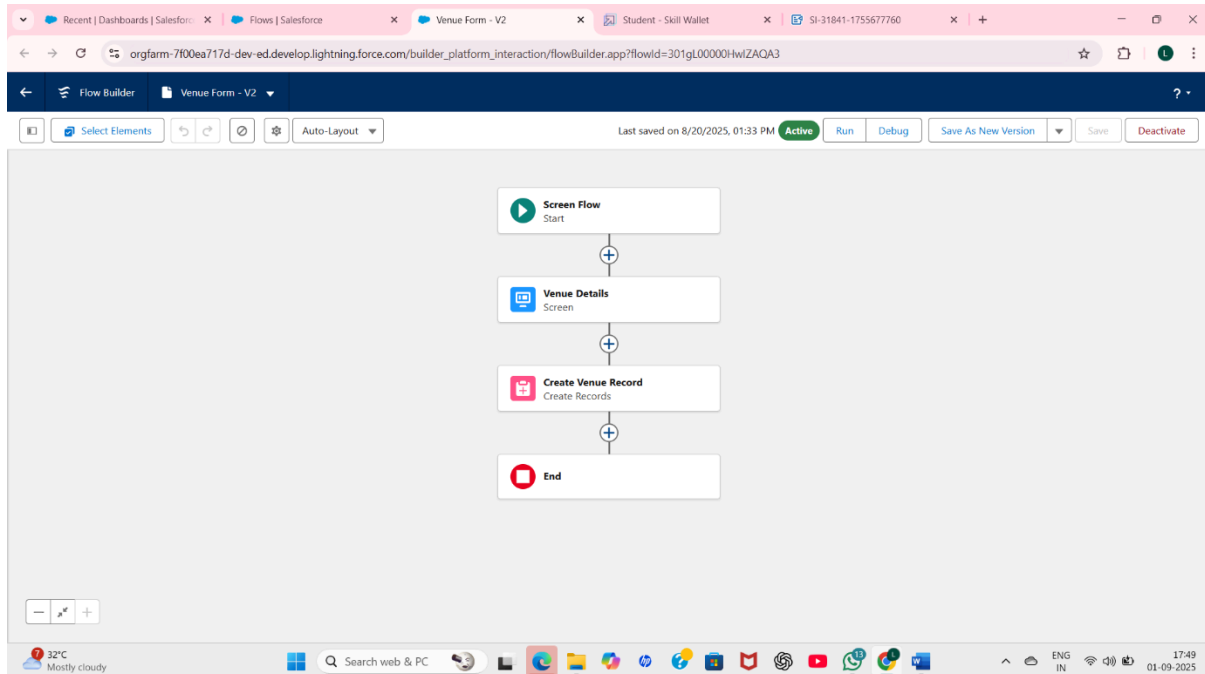
Formula Fields (auto-calculate status).

Auto Number Fields (unique IDs for tasks).

- **Automation**

Flow: To create Venue records automatically.

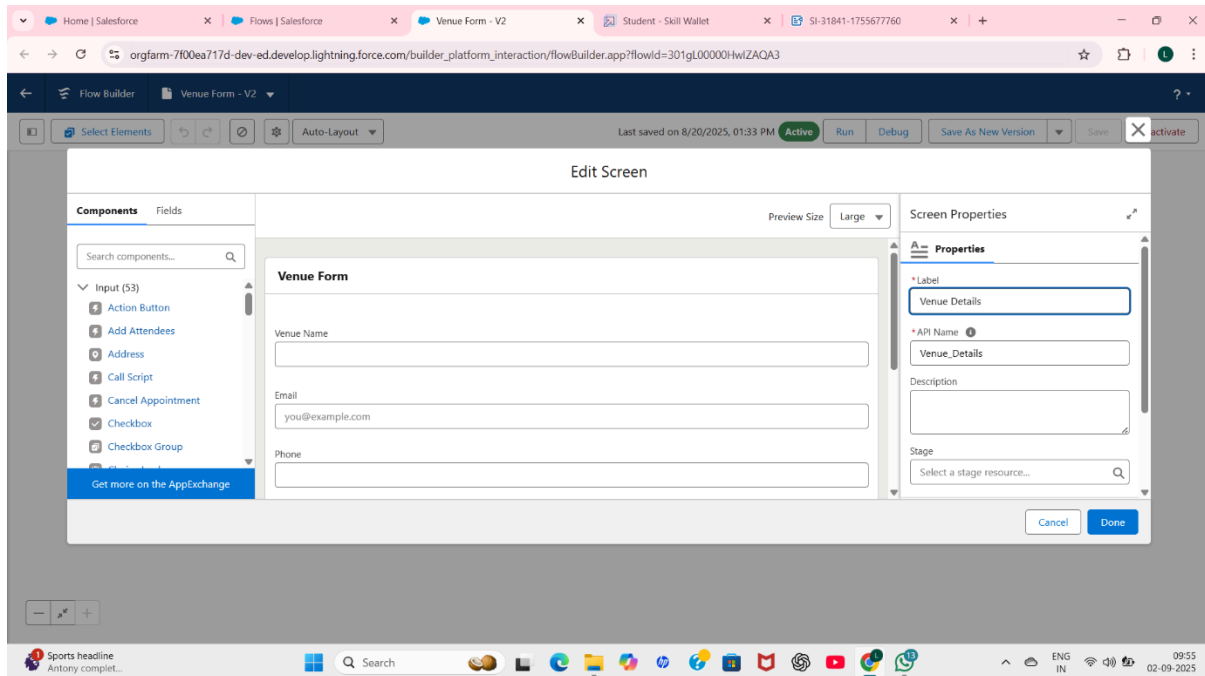**Trigger:** DropOffTrigger to calculate the distance between venues and drop-off points

Validation Rules: Example – Ensuring Contact Email/Phone is mandatory for Venue

- **Venue Custom Object Fields**

  Flow – Venue Creation

Trigger Code in Developer Console (DropOffTrigger)
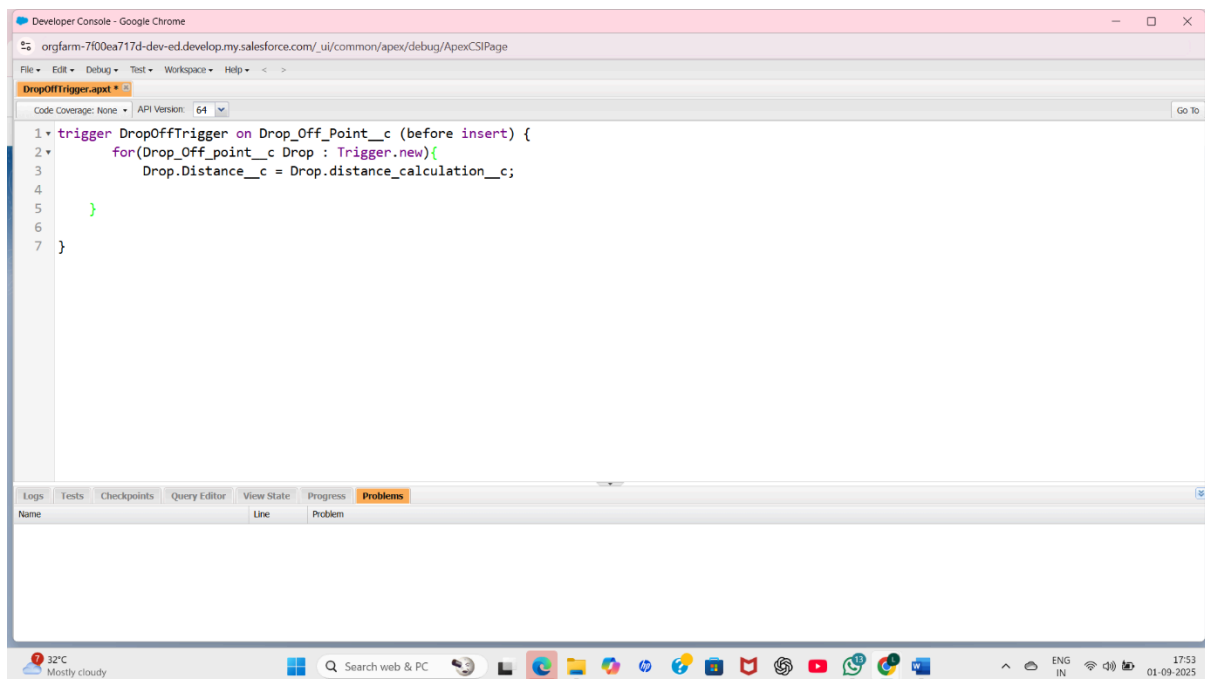
- UI/UX Development & Customization

In this phase, the user interface was designed for better usability.

- **Lightning App:** FoodConnect
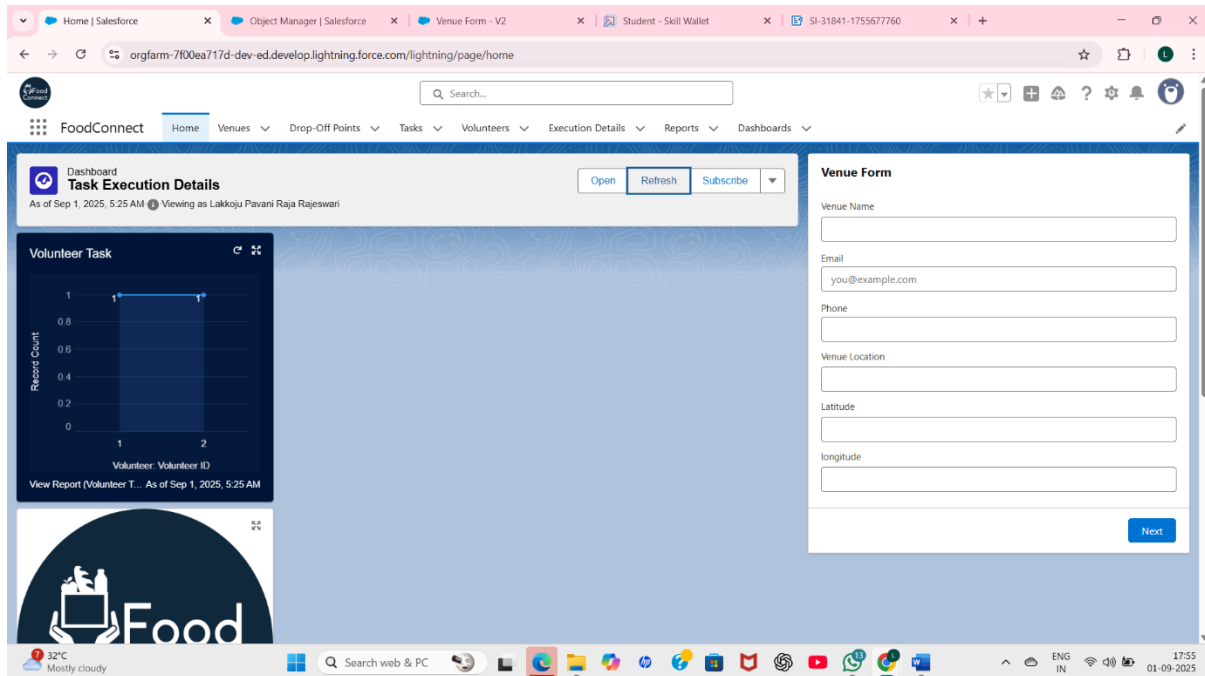
- **Navigation items:** Venue, Drop-Off Point, Volunteer, Task, Execution Details.

- **Tabs & Page Layout**

Custom layouts for each object.

Volunteers can see only their assigned tasks.

NGOs can track execution details for their food distribution.

- **Reports**
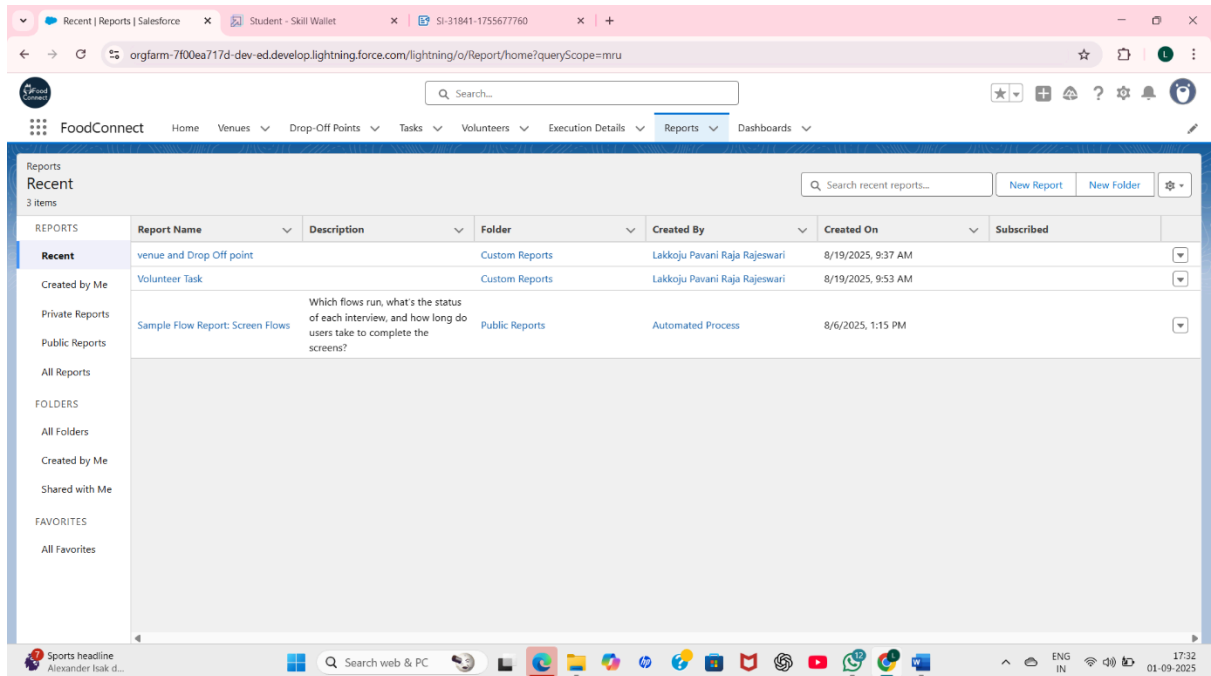
Venue with Drop-Off & Volunteers.

Volunteers with Execution Details & Tasks.

Dashboards

Organization-level dashboards showing food donations over time.

Task Execution dashboard displaying completed vs pending tasks.

- **Dashboards**

Data Migration, Testing & Security

Data Migration

Used Salesforce Data Import Wizard and Data Loader to migrate NGO and Volunteer records

Security Implementation

Profiles – NGO Profile,

Users – Shisha Foundation, NSS, Street Cause.

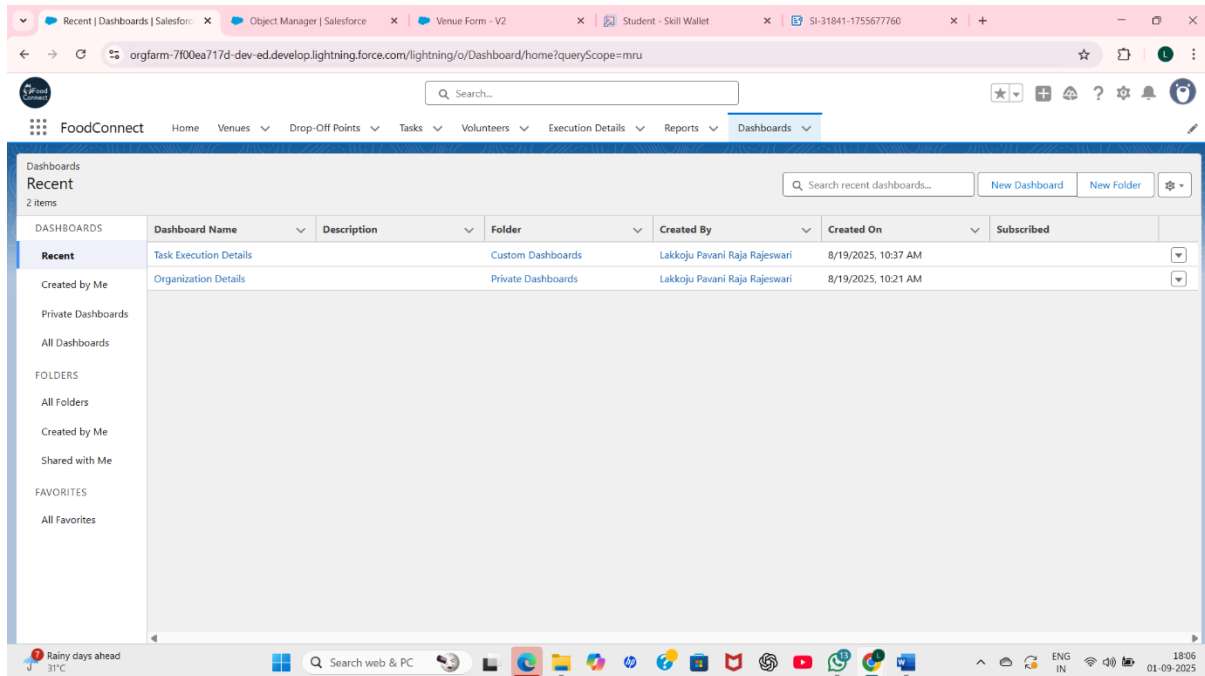Public Groups – Grouped NGOs for collaboration.

Sharing Rules – Distance-based access for drop-off points.

Testing

Verified Flows for Venue creation.

Verified Triggers for distance calculation.

Verified Reports & Dashboards with sample data.

Test Classes executed to achieve coverage >75%.

- **users**

creation of users

creating the users like this, we need to create the remains two users also like that only

- **profile**

creating the profile with the name of NGO's profile

- **Deployment**

Used Change Sets to deploy configurations and customizations from Developer Internationalization to Production.

- **Maintenance**

Regular system health checks.

Error log monitoring.

User feedback collected periodically.

- **Troubleshooting**

Capturing Flow errors and providing debug logs.

Resolving sharing rule conflicts.

- **Future Enhancements**

AI chatbot to respond to NGO and Volunteer queries.

WhatsApp integration for real-time volunteer coordination.

Predictive reports on food demand patterns.

- **Conclusion**

The FoodConnect CRM successfully delivers a robust, automated, and transparent solution for food donation management. By integrating venues, drop-off points, volunteers, and NGOs into a single Salesforce-powered ecosystem, it ensures efficient resource utilization and reduces food wastage.The project not only solves challenges but also provides actionable insights dashboards and reports. With future enhancements such as AI chatbots and WhatsApp integration, FoodConnect CRM has the potential to become a digital solution to tackle food in security.

THANK YOU

Food connect

Where food is Shared ,Happiness is doubled and From our Kitchen to Your table, Connections are made .

 Prepared by

Battala Kalyani

14 Oct 2025