

DonorLink

Disaster Relief & Donation Distribution Tracker

Phase 1: Problem Understanding & Industry Analysis

This phase defines the project's purpose, scope, and stakeholders.

- **Project Charter:**
 - **Title:** Disaster Relief & Donation Distribution Tracker (ReliefTrack)
 - **Industry:** NGOs / Government / Disaster Management
 - **Problem Statement:** Current disaster relief operations face challenges in tracking donations, managing volunteers, and ensuring timely distribution, often leading to inefficiencies and delayed aid.
 - **Proposed Solution:** A Salesforce app to centralize donations, manage supplies, assign volunteers automatically, and provide real-time dashboards for relief progress.
 - **Key Use Cases:**
 1. Track donations and supplies.
 2. Auto-assign volunteers to distributions.
 3. Monitor supply vs. demand and trigger alerts.
 4. Generate reports and dashboards for relief monitoring.
- **Stakeholders:**
 - NGO Admin / Manager: Oversees supplies and volunteer assignments.
 - Volunteer: Carries out distribution tasks.
 - Donor: Provides donations.
 - Executive / Supervisor: Monitors overall relief progress.

- **Core Business Process:** Donations received → Supplies recorded → Relief requests processed → Volunteers assigned → Supplies distributed → Progress monitored.
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Phase 2: Org Setup & Configuration

Prepare the Salesforce Developer Org for the application build.

- **Company Information:** Configure organization name, address, and time zone.
 - **User Profiles:** Create profiles for Manager, Volunteer, and Executive.
 - **Sample Users:** Create at least one user for each profile (e.g., Ria Manager, Vin Volunteer, Eva Executive).
 - **Role Hierarchy:** Set up a simple hierarchy (e.g., Admin > Manager > Volunteer).
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Phase 3: Data Modelling & Relationships

Create the objects that form the app's foundation.

- **Custom Objects:**
 1. Donor
 2. Supply
 3. Distribution
 4. Volunteer
 5. Relief Request
- **Relationships & Fields:**
 - **Supply:** Item Name, Quantity Received, Supplier, Expiry Date
 - **Distribution:** Location, Quantity Distributed, Date, Assigned Volunteer (lookup)

- **Volunteer:** Name, Availability, Status
 - **Relief Request:** Location, Requested Item, Demand Quantity, Status
 - **Donor:** Name, Contact, Donation Type, Donation Amount
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Phase 4: Process Automation (Admin)

- **Flow 1 – Supply Alert:** Trigger alerts when demand exceeds supply.
 - **Flow 2 – Volunteer Assignment:** Automatically assign available volunteers to new distribution requests.
 - **Validation Rules:** Prevent distribution if supply is insufficient.
 - **Screen Flow:** “Assign Volunteer” tool for managers to manually assign volunteers when needed.
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Phase 5: Apex Programming (Developer – Optional Enhancements)

- **Apex Trigger:** Automatically update remaining supply after each distribution.
 - **Batch Apex:** Nightly update to set volunteer availability to “Available” if assigned tasks are completed.
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Phase 6: User Interface Development

- **Lightning App:** Build a new app named “ReliefTrack.” Add tabs: Home, Donors, Supplies, Distributions, Volunteers, Relief Requests, Reports, Dashboards.
- **Page Layouts:** Organize fields and related lists (e.g., Volunteer assignments on Distribution page).
- **Embed Screen Flow:** Place “Assign Volunteer” tool on Distribution record page for managers.

Phase 7: Integration & External Access (Future)

- **REST API:** Allow external websites to fetch supply or volunteer availability.
- **Platform Events:** Broadcast messages when new relief requests are created for integration with other systems.

Phase 8: Data Management & Deployment

- **Data Import:** Prepare CSV files for Donors, Supplies, Volunteers, and Relief Requests. Use Data Loader for bulk import.
- **Deployment Strategy:** Build and test in Sandbox first, then deploy components to Production using Change Sets.

Phase 9: Reporting, Dashboards & Security Review

- **Custom Reports:**
 - Supplies Received vs Distributed
 - Volunteer Assignment Report
 - Relief Request Status Report
- **Dashboard:** “ReliefTrack Management Dashboard” with charts showing supplies, volunteer activity, and progress by location.
- **Security Review:**
 - Object permissions: Executive read-only, Manager full access, Volunteer limited access.
 - Field-level security: Hide sensitive fields (e.g., donor contact details from volunteers).

Phase 10: Final Presentation & Demo Day

- Prepare a narrative showing the business problem and solution.
- Demonstrate core processes:
 1. Admin records donation → Supply created.
 2. Relief Request processed → Volunteer auto-assigned.
 3. Distribution completed → Dashboard updated.