# Title: - To Supply Leftover Food to Poor Using Salesforce

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**College Code:** BRU3a

**TEAM ID: NM2025TMID27218**

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# INTRODUCTION

**Project overview:** Food wastage is a serious challenge in today's world, where large quantities of edible food are thrown away while millions struggle with hunger. This project focuses on creating a Salesforce CRM-based solution to efficiently manage leftover food collection and distribution. The application connects restaurants, donors, volunteers, NGOs, and drop-off points into a single streamlined system. Using custom objects, workflows, triggers, and dashboards, the process of tracking, transporting, and delivering food becomes automated and transparent. The project proves how technology can reduce wastage, ensure timely delivery, and contribute towards building a hunger-free society.

## Objectives:

- **Enhance Food Distribution Efficiency:** Ensure fast and smooth tracking of leftover food collection and delivery, so that needy people receive food on time.
- **Improve Volunteer Coordination:** Automate volunteer scheduling, notifications, and task allocation, reducing manual effort and confusion.
- **Ensure Transparency:** Maintain accurate records of donors, recipients, and distribution details, which improves trust and accountability.
- **Optimize Resource Management:** Monitor surplus food inventory, allocate it properly, and minimize unnecessary wastage
- **Enhance Real-Time Visibility:** Provide live updates of food availability, delivery status, and tracking for donors, volunteers, and receivers.
- **Promote Social Impact:** Build a transparent and efficient system that motivates donors and volunteers to contribute actively for society.

## Student outcomes:

- **Hands-on Experience:** Students practice Salesforce configuration, workflow automation, and real-time tracking, gaining technical knowledge through practical application.
- **Project Lifecycle Knowledge:** They learn the complete CRM project process from requirement gathering to deployment, preparing for real-world Salesforce projects.
- **Problem-Solving Skills:** Students develop the ability to identify food distribution challenges, design effective solutions, and troubleshoot technical issues.
- **Collaboration Skills:** By working as a team, students gain experience in requirement gathering, development, and testing with better coordination.
- **Industry Exposure:** They understand how Salesforce CRM is applied in social good projects, building confidence for future career opportunities.
- **Communication Skills:** Students improve their communication while interacting with NGOs, donors, and volunteers, as well as while presenting project reports.
- **Social Responsibility:** They learn the importance of reducing food wastage and how technology can support society through innovative solutions.

## System Requirement:

### Hardware Requirement:

- Computer with min/sum 4 GB RAM, Dual-core processor
- Stable internet connection

### Software Requirement:

- Salesforce Developer Edition Org
- Modern Web Browser (e.g., Google Chrome, Firefox)

**Project Duration: 30 Hours;**

**Phases Overview:**

| Phase No: | Phase Name | Description | Page Numbers |
|---|---|---|---|
| 1 | Requirement Analysis & Planning | Gathering requirements from donors, volunteers, and receivers; defining scope and goals; planning data model and workflows. | 5 |
| 2 | Salesforce Development – Backend & Configurations | Creating custom objects, fields, relationships; setting up Flows and Apex Triggers for automation | 5 - 12 |
| 3 | UI/UX Development & Customization | Building Lightning App, customizing layouts, adding fields, implementing Flows, and developing UI logic. | 12 – 28 |
| 4 | Data Migration, Testing & Security | Creating Users, Profiles, Public Groups, Sharing Rules; configuring Report Types, Reports, Dashboards; testing functionalities and ensuring data security. | 28 – 38 |
| 5 | Deployment, Documentation & Maintenance | Designing and finalizing Home Page, deploying solution to live environment, preparing documentation, conclusion, and ongoing system maintenance. | 38 - 43 |

**Phase 1:** Requirement Analysis & Planning: -

## To Supply Leftover Food to Poor:

Utilizing Salesforce, our project streamlines surplus food collection and distribution to the needy, ensuring efficiency and transparency.

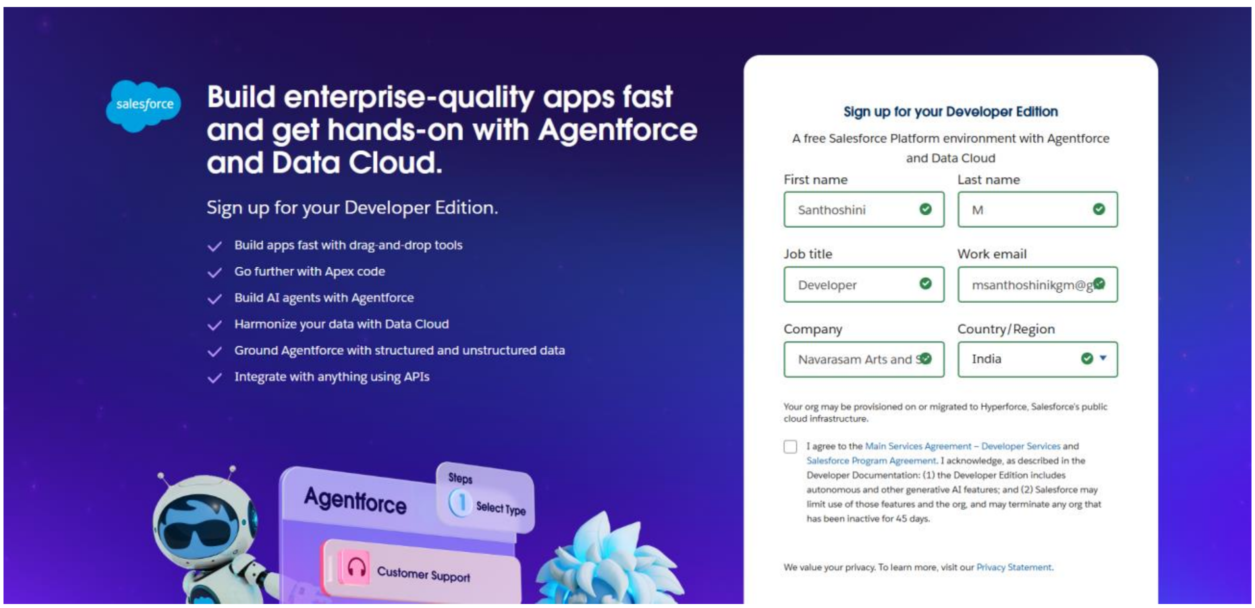
**Phase 2:** Salesforce Development – Backend & Configurations: -

## Milestone 1: Salesforce developer account creation

## Activity 1: Creating Developer Account

Steps to Create a Salesforce Developer Org

1. Go to https://developer.salesforce.com/signup




2. Fill the signup form with:

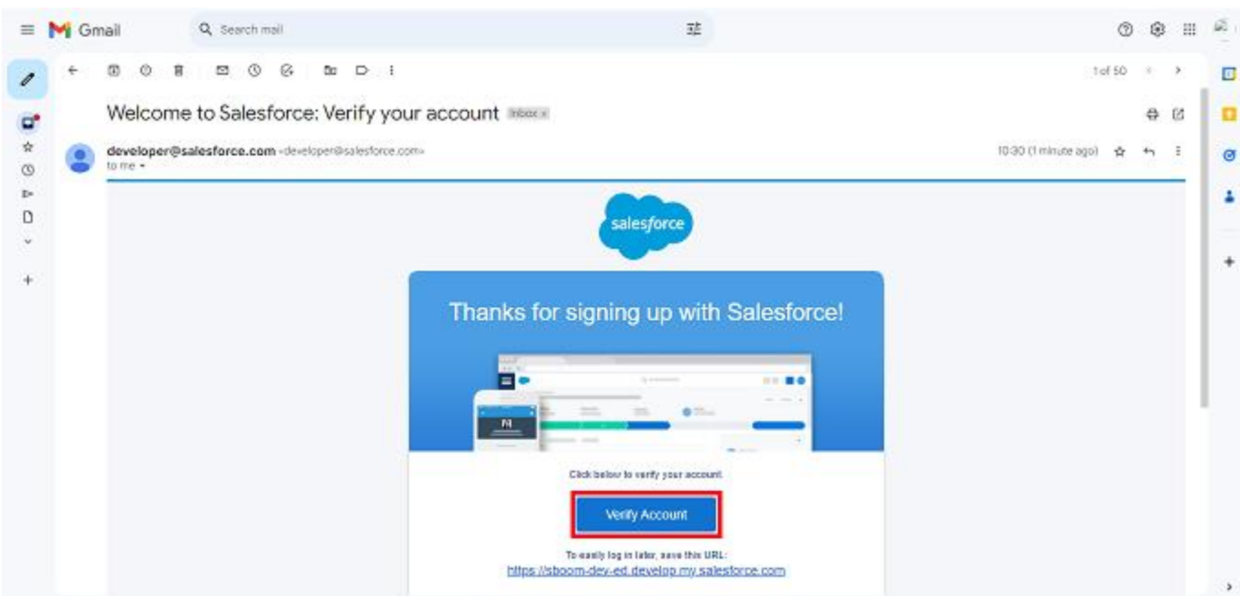
- First Name & Last Name

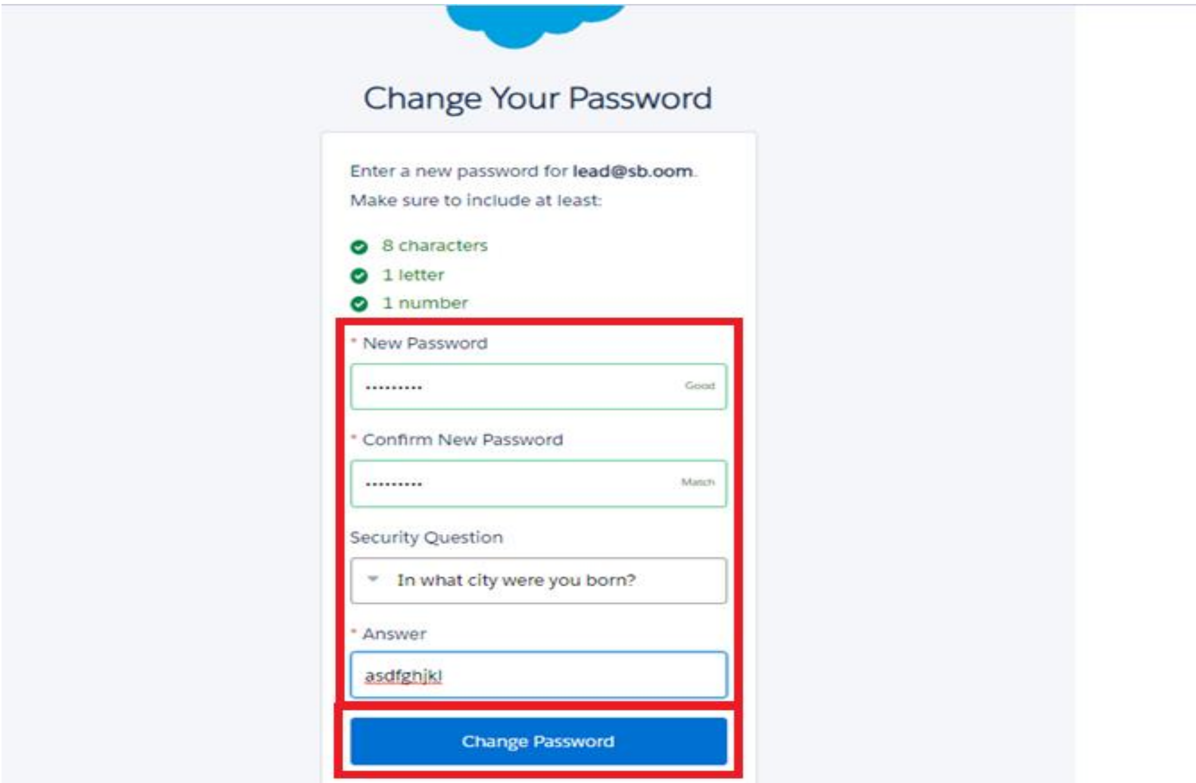
- Email ID
- Role: Developer
- Company: College/Company Name
- Country: India
- Postal Code: Your PIN Code
- Username: should be a combination of your name and company

3. Click Sign Me Up to complete the registration.

## Activity 2: Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.

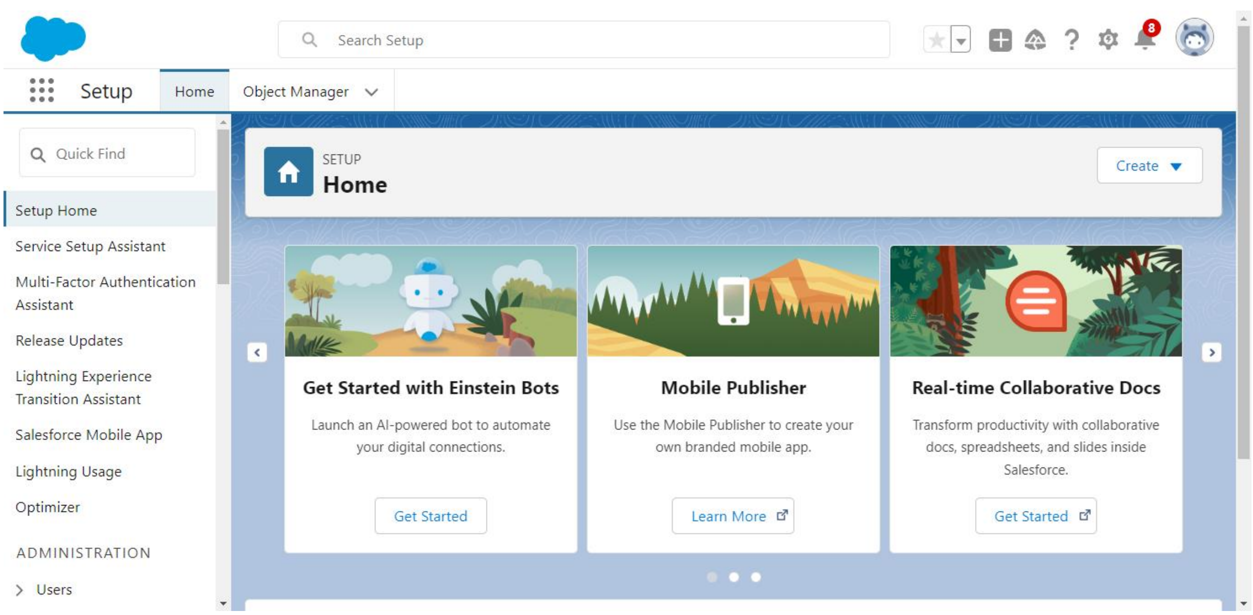





1. click on Verify Account

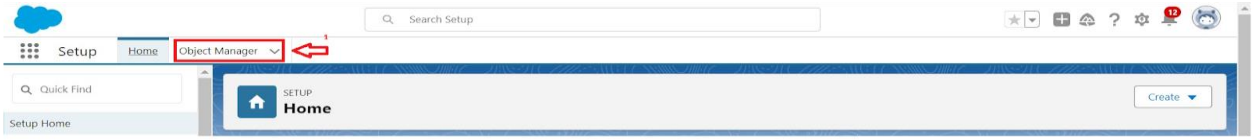
2.Give a password and answer a security question and click on change password.

3.Then you will redirect to your salesforce setup page.




## Milestone 2: Object: -

To Navigate to Setup page:

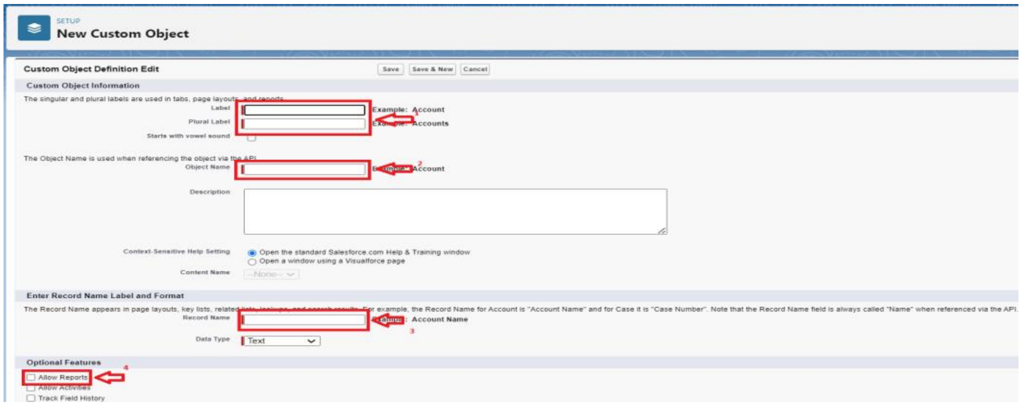


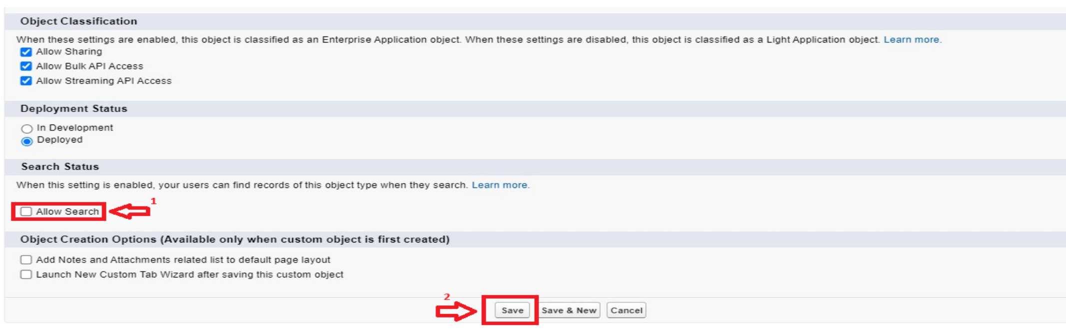

To create an object:

1.From the setup page > Click on Object Manager > Click on Create > Click on Custom Object.


2.On Custom object defining page:

3. Enter the label name, plural label name, click on Allow reports, Allow search.






4.Click on save.

## Activity 1: Create Venue Object: -

1. Go to Setup → Object Manager → Create → Custom Object
2. Enter:
    a. Label Name: Venue
    b. Plural Label: Venues
    c. Record Name: Venue Name (Data Type: Text)
3. Select:
    a. Allow Reports
    b. Track Field History
    c. Allow Activities
    d. Allow Search
4. Click Save.

### Activity 2: Create Drop-Off Point Object: -

1. Go to Setup → Object Manager → Create → Custom Object
2. Enter:
    a. Label Name: Drop-Off Point
    b. Plural Label: Drop-Off Points
    c. Record Name: Drop-Off Point Name (Data Type: Text)
3. Select: Allow Reports, Track Field History, Allow Activities, Allow Search
4. Click Save.

### Activity 3: Create Task Object: -

1. Go to Setup → Object Manager → Create → Custom Object
2. Enter:
    a. Label Name: Task
    b. Plural Label: Tasks
    c. Record Name: Task Name (Data Type: Text)
3. Select: Allow Reports, Track Field History, Allow Activities, Allow Search
4. Click Save.

### Activity 4: Create Volunteer Object: -

1. Go to Setup → Object Manager → Create → Custom Object
2. Enter:
    a. Label Name: Volunteer
    b. Plural Label: Volunteers
    c. Record Name: Volunteer Name (Data Type: Text)
3. Select: Allow Reports, Track Field History, Allow Activities, Allow Search
4. Click Save.

### Activity 5: Create Execution Details Object: -

1. Go to Setup → Object Manager → Create → Custom Object

2. Enter:
    a. Label Name: Execution Detail
    b. Plural Label: Execution Details
    c. Record Name: Execution Detail Name (Data Type: Text)
3. Select: Allow Reports, Track Field History, Allow Activities, Allow Search
4. Click Save.

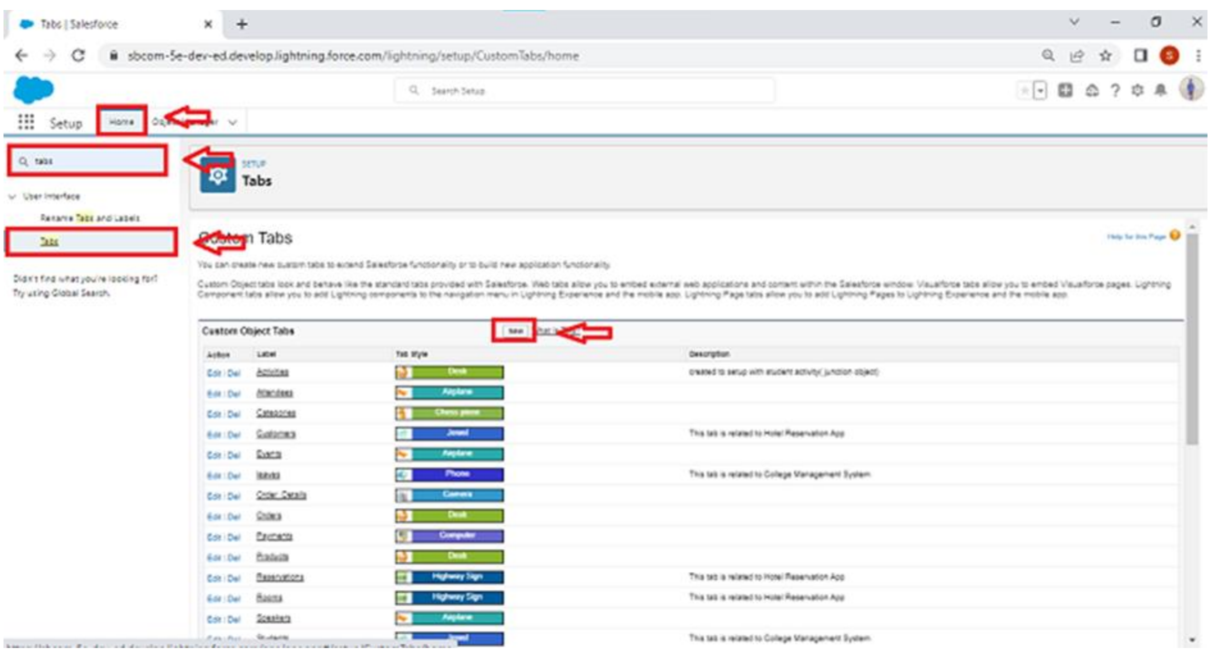
## Milestone 2: TABS: -

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.

## Activity 1: Creating a Custom Tab: -

To Create a Tab (Venue)

1. Go to Setup → Quick Find: Tabs → Custom Object Tabs → New




2.Select Object: Venue → Choose Tab Style

3.Next → Keep default for profiles

4. Next → In Custom App, uncheck *Include Tab*

5. Ensure *Append tab to users' existing personal customizations* is checked

6. Click Save.

## Activity 2: Creating Remaining Tabs: -

Now create the Tabs for the remaining Objects, they are “Drop-Off Point, Task, Volunteer, Execution Details”. 2. Follow the same steps as mentioned in Activity -1.

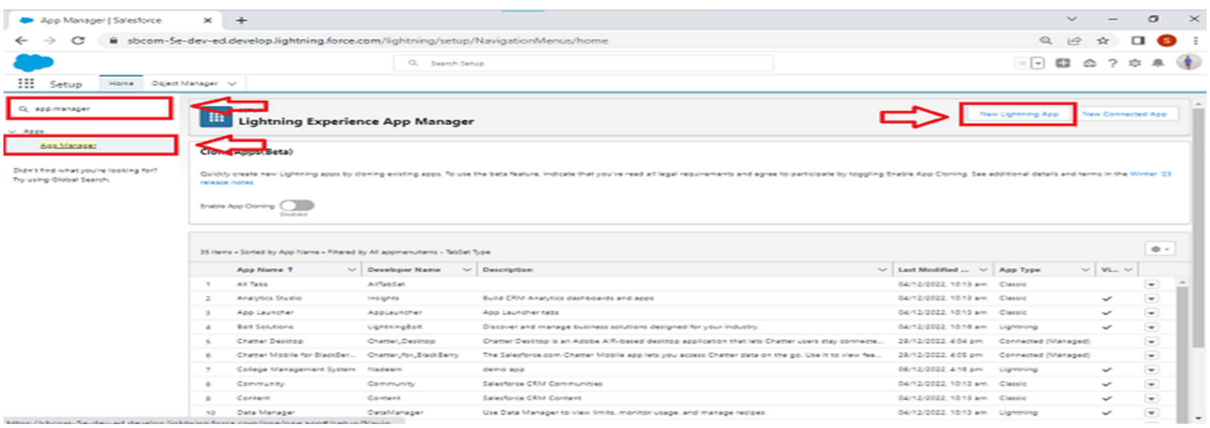
## **Phase 3:** UI/UX Development & Customization:

## Milestone 4: THE LIGHTNING APP: -

## Create a Lightning App:

**To create a lightning app page**

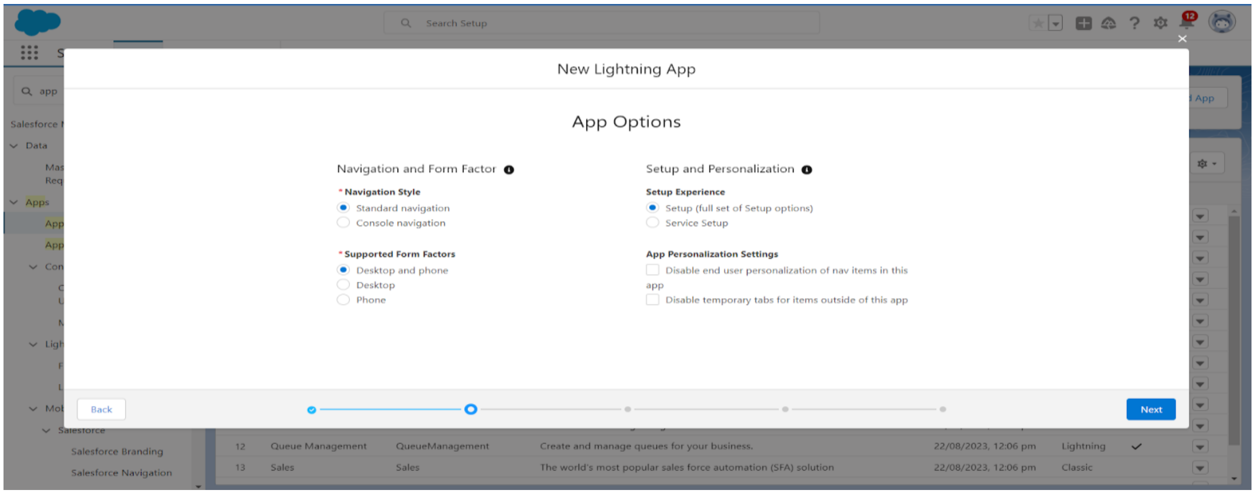
1. Go to Setup → App Manager → New Lightning App




2. Enter:

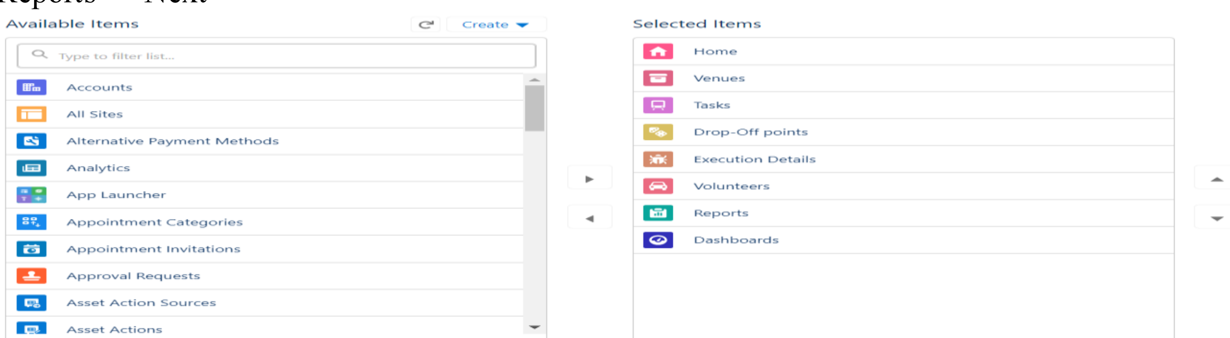
- App Name: Food Connect
- Developer Name: Auto populated
- Image: Optional
- Primary Color: Default

3. Next → Set Navigation Style: Standard Navigation



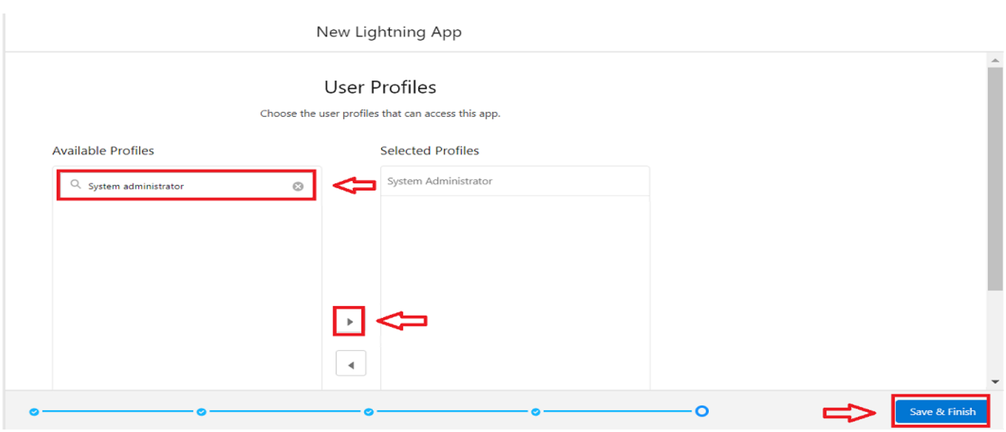

4.Utility Items: Keep default → Next

5.Add Navigation Items: Home, Venue, Drop-Off Point, Task, Volunteer, Execution Details, Reports → Next →




Next

Add User Profiles: Select System Administrator → Save & Finish

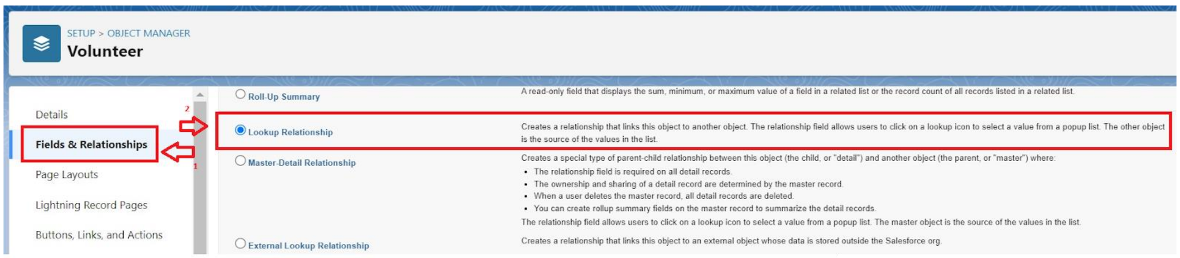


# Milestone 5: FIELDS: -

## Activity 1: Creation of Relationship Fields in Object: -

### Creation of Lookup Relationship Field on Volunteer Object:

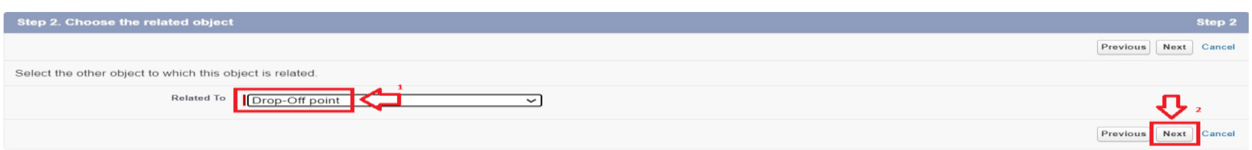
1. Go to Setup → Object Manager → Volunteer




2. Click Fields & Relationships → New

3. Select Master-Detail Relationship

4. Related Object: Drop-Off Point → Next




5. Field Name: **Drop_Off_point** (Label auto-generated)

6. Click **Next** → **Next** → **Save**

### Creation of Master Detail Relationship Field on Execution Details Object:

7.Setup → Object Manager → Execution Details

8.Fields & Relationships → New → Master-Detail → Volunteer

9.Field Name: Volunteer → Save

**Creation of Master-Detail Relationship Field on Execution Detail Object:**

10. Setup → Object Manager → Execution Details

11. Fields & Relationships → New → Master-Detail → Task

12. Field Name: Task → Save

**Creation of Lookup Relationship Field on Drop-Off Point Object:**

13. Setup → Object Manager → Drop-Off Point

14. Fields & Relationships → New → Lookup → Venue

15. Field Name: Venue → Save

**Creation of Lookup Relationship Field on Task Object:**

16. Setup → Object Manager → Task

17. Fields & Relationships → New → Lookup → Venue

18. Field Name: Sponsored By → Save

**Creation of Lookup Relationship Field on Task Object:**

19. Setup → Object Manager → Task

20. Fields & Relationships → New → Lookup → Drop-Off Point

21. Field Name: Drop-Off Point → Save

## Activity 2: Creation of Fields for Venue Object: -

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

2. Data Type: Email

3. Field Label: Contact Email

4. Required → Save & New

**To create another fields in an object:**

5.Data Type: Phone

6. Field Label: Contact Phone

7. Required → Save & New

**To create another fields in an object:**

8. Data Type: Geolocation

9. Field Label: Location

10. Decimal Places: 4

11. Description: Enter the Geolocation of your Venue

12. Save & New

**To create another fields in an object:**

13. Data Type: Long Text Area

14. Field Label: Venue Location

15. Field Name: Venue_Location

16. Save & New

## Activity 3: Creation of Fields for Drop-Off Point Object: -

1. Go to Setup → Object Manager → Drop-Off Point

2. Click Fields & Relationships → New

3. Select Data Type: Geolocation → Click Next

4. Fill details:

- Field Label: Location
- Field Name: Auto-generated
- Description: Enter the Geolocation of the Drop-Off Point
- Geolocation Options: Decimal
- Decimal Places: 4

5. Click Next → Next → Save & New

**To create another fields in an object:**

5. Go to Setup → Object Manager → Drop-Off Point

6. Click Fields & Relationships → New

7. Select Data Type: Formula → Click Next

8. Fill details:

- Field Label: distance calculation
- Field Name: distance_calculation
- Formula Return Type: Number

9. Enter Formula: DISTANCE(Location_2__c, Venue__r.Location__c, 'km')

10. Click Next → Next → Save & New


**To create another fields in an object:**

11. Go to Setup → Object Manager → Drop-Off Point.

12. Click on Fields & Relationships → New.

13. Select Data Type: Picklist → Click Next.

14. Fill details:

- Field Label: State
- Field Name: State
- Values: Enter each value in a new line (all Indian States & UTs):
  Andhra Pradesh

Arunachal Pradesh
Assam
Bihar
Chhattisgarh
Goa
Gujarat
Haryana
Himachal Pradesh
Jharkhand
Karnataka
Kerala
Maharashtra
Madhya Pradesh
Manipur
Meghalaya
Mizoram
Nagaland
Odisha
Punjab
Rajasthan
Sikkim
Tamil Nadu
Tripura
Telangana
Uttar Pradesh
Uttarakhand
West Bengal
Andaman & Nicobar (UT)
Chandigarh (UT)
Dadra & Nagar Haveli and Daman & Diu (UT)
Delhi [National Capital Territory (NCT)]
Jammu & Kashmir (UT)
Ladakh (UT)
Lakshadweep (UT)
Puducherry (UT)

- Check Required.

15. Click Next → Next → Save & New.

**To create another fields in an object:**

16. Go to Setup → Object Manager → Task.

17. Click on Fields & Relationships → New.

18. Select Data Type: Number → Click Next.

19. Fill details:

- Field Label: Distance
- Field Name: Distance
- Length: 14
- Decimal Places: 4

20. Check Required.

21.Click Next → Next → Save & New.

## Activity 4: Creation of Fields for Task Object: -

1. Go to Setup → Object Manager → Task.

2. Click Fields & Relationships → New.

3. Select Auto Number → Next.

4. Fill details:

- Field Label: Task ID
- Display Format: TASK- {0}
- Starting Number: 1
- Field Name: Auto-generated

5. Check Required

6. Click Next → Next → Save & New.

**To create another fields in an object:**

7. Go to Task → Fields & Relationships → New.

8. Select Date → Next.

9. Fill details:

- Field Label: Date
- Field Name: Date
- Check Required

10. Click Next → Next → Save & New.

**To create another fields in an object:**

11. Go to Task → Fields & Relationships → New.

12. Select Picklist (Multi-Select) → Next.

13. Fill details:

- Field Label: Food Category
- Field Name: Food_Category
- Values
  Veg
  Non-Veg
  Salad
  Snack
- Check Required

14. Click Next → Next → Save & New.

**To create another fields in an object:**

15.Go to Task → Fields & Relationships → New.

16. Select Number → Next.

17. Fill details:

- Field Label: Number of People Served
- Field Name: Number_of_People_Served
- Check Required

18. Click Next → Next → Save & New.

**To create another fields in an object:**

19.Go to Task → Fields & Relationships → New.

20.Select Text → Next.

21. Fill details:

- Field Label: Name of the Person
- Field Name: Name_of_the_Person

22. Click Next → Next → Save & New.

**To create another fields in an object:**

23. Go to Task → Fields & Relationships → New.

24. Select Phone → Next.

25. Fill details:

- Field Label: Phone
- Field Name: Phone

26. Click Next → Next → Save & New.

**To create another fields in an object:**

27. Go to Task → Fields & Relationships → New.

28. Select Picklist → Next.

29. Fill details:

- Field Label: Rating
- Field Name: Rating
- Values
  1
  2
  3
  4
  5

30. Click Next → Next → Save & New.

**To create another fields in an object:**

31. Go to Task → Fields & Relationships → New.

32. Select Long Text Area → Next.

33. Fill details:

- Field Label: Feedback
- Field Name: Feedback

34. Click Next → Next → Save & New.

## Activity 5: Creation of Fields for the Volunteer Object:-

1. Setup → Object Manager → Search Volunteer → Click.

2. Go to Fields & Relationships → Click New.

3. Select Auto Number → Click Next.

4. Fill details:

- Field Label: Volunteer ID
- Display Format: VOL-{000} (example, 001, 002, 003...)
- Starting Number: 1
- Field Name: Auto-generated
- Tick Required checkbox.

5. Click Next → Next → Save & New.

**To create another fields in an object:**

6. Go to Fields & Relationships → Click New

7. Select Picklist → Next.

8. Fill details:

- Field Label: Gender
- Field Name: Gender
- Values (each in new line):
    - Male
    - Female
- Keep Use first value as default if needed.

9. Next → Next → Save & New.

**To create another fields in an object:**

10. Click New → Select Date → Next.

11. Fill details:

- Field Label: Available On
- Field Name: Available_On
- Tick Required checkbox.

12. Next → Next → Save & New.

**To create another fields in an object:**

13. Click New → Select Number → Next

14. Fill details:

- Field Label: Age
- Field Name: Age
- Tick Required checkbox
- Decimal Places = 0

15. Next → Next → Save & New.

**To create another fields in an object:**

16. Click New → Select Email → Next.

17. Fill details:

- Field Label: Email
- Field Name: Email
- Tick Required checkbox.

18. Next → Next → Save & New.

**To create another fields in an object:**

19. Click New → Select Number → Next.

20. Fill details:

- Field Label: Contact Number
- Field Name: Contact_Number
- Tick Required checkbox.

- Decimal Places = 0
- Length = 10 (Indian mobile format).

21. Next → Next → Save & New.

**To create another fields in an object:**

22. Click New → Select Text Area (Long) → Next.

23. Fill details:

- Field Label: Address
- Field Name: Address
- Set length = 255 characters (default ok).

24. Next → Next → Save & New.

**To create another fields in an object:**

25. Click New → Select Date → Next.

26. Fill details:

- Field Label: Date of Birth
- Field Name: Date_of_Birth
- Required = Optional (user's choice).

27. Next → Next → Save

## Activity 5: Creation of Fields for the Execution Details Object: -

1. Go to Setup → open Object Manager → search Volunteer → click the object.

2. In left panel, click Fields & Relationships → click New.

3. From Data Types, select Auto Number → click Next.

4. Fill details:

- Field Label: Execution ID
- Field Name: Auto generated
- Tick Required checkbox

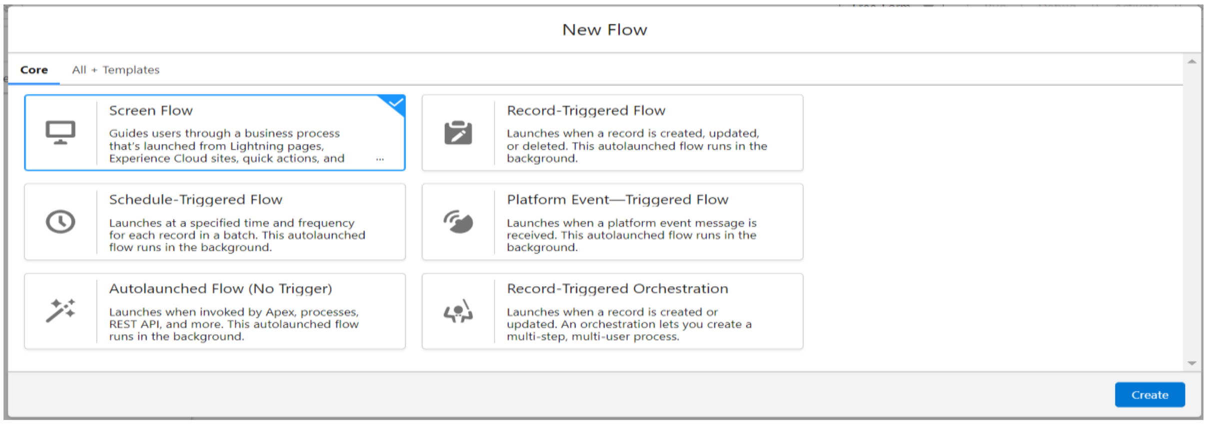
5. Click Next → Next → Save & New.

# Milestone 6: FLOWS:-

## 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.




3. Click on the '+' icon in between start and end, and click on the screen element.

4. Under the Screen Properties:

- Label : Venue Details
- API Name : Venue_Details

5. Now let's add components in this flow. Click on Text Component and name it as:

- Label : Venue Name
- API Name : Venue_Name

6. Click on Email Component and name it as:

- Label : Email
- API Name : Contact_Email

7. Click on Phone Component and name it as:

- Label : Phone
- API Name : Contact_Phone

8. Click on Text Component and name it as:

- Label : Venue Location
- API Name : Venue_Location

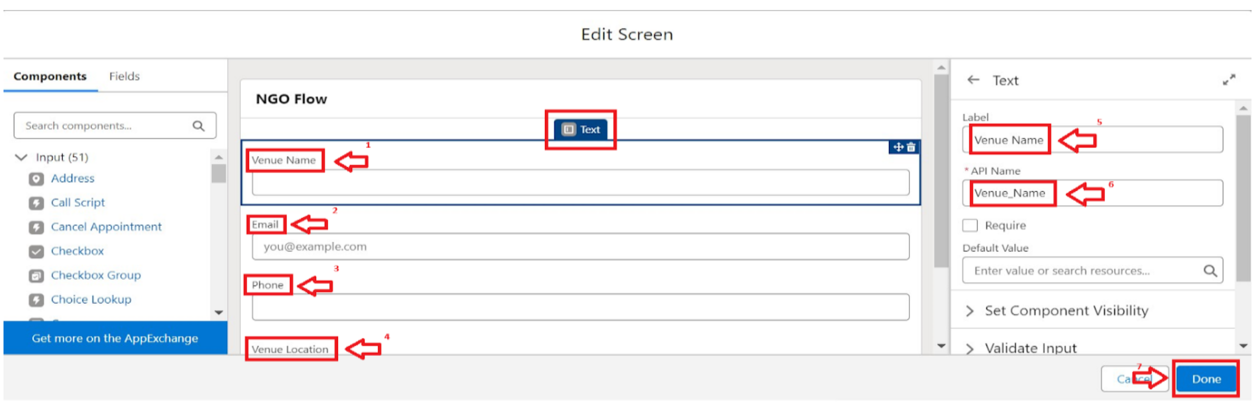
9. Click on Number Component and name it as:

- Label : Latitude
- API Name : Latitude

10. Click on Number Component and name it as:

- Label : longitude
- API Name : longitude

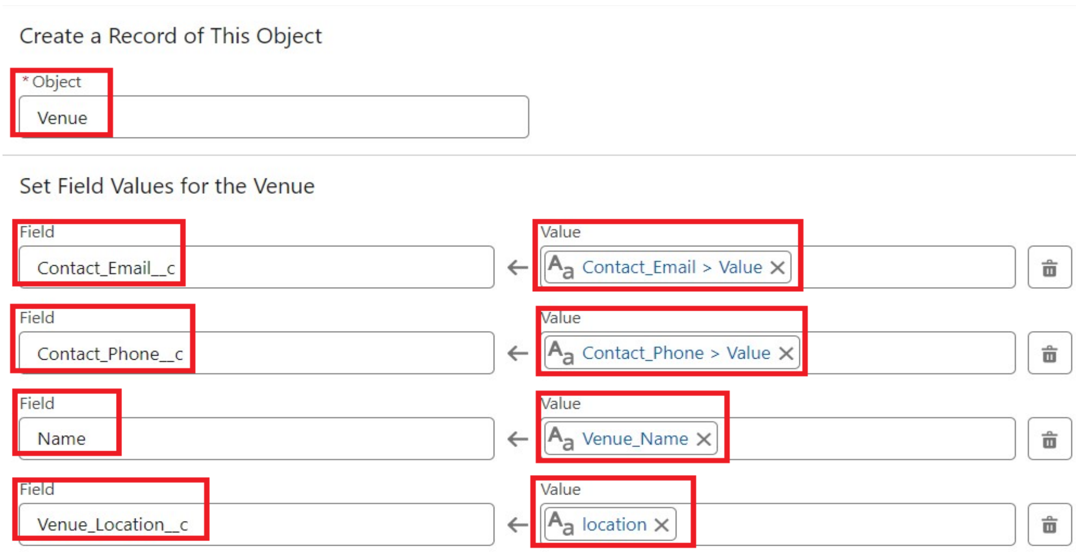
11. Next click on Done. This would like below




12. Click on the '+' icon in between Venue details and end, and click on create record element.
13. Now label it as

- Label : Create Venue Record
- API Name : Create_Venue_Record
- How Many Records to Create : One
- How to Set the Record Fields : Use separate resources, and literal values
- Object : Venue
- Set Field Values for the Venue : Click on 'Add Field' 5 times
- Field : Value = Contact_Email__c : {!Contact_Email.value}
- Field : Value = Contact_Phone__c : {!Contact_Phone.value}
- Field : Value = Name : {!Venue_Name}
- Field : Value = Venue_Location__c : {!location}
- Field : Value = Location__Latitude__s : {!latitude}
- Field : Value = Location__Longitude__s : {!longitude}

14. This would look like:




15. Click on Save as:

Flow Label : Venue Form

Flow API Name : Venue_Form

## Milestone 7: TRIGGER :-

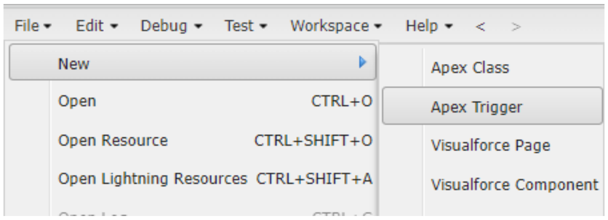
### Activity 1: Create a Trigger :

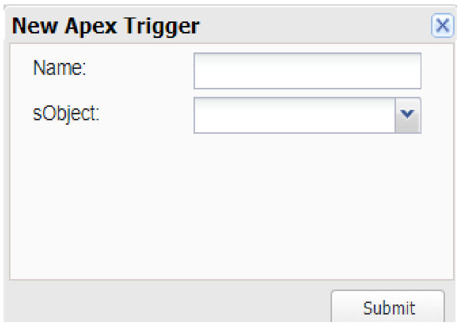
1. Log in to Trailhead account → click Gear icon (top-right).

2. Select Developer Console → new console window opens.

3. In menu bar, go to File → New → Trigger.

4. Enter Trigger Name + Object → Save




5. Enter Name: DropOffTrigger

sObject: Drop-Off Point

6. Click on Submit.

## Activity 2: Trigger Code:

(This Trigger is to assign the Distance field to the Distance Calculation field. So that we can assign the distance in the sharing rules.)

**Code:**

```
trigger DropOffTrigger on Drop_Off_point__c (before insert) {
for(Drop_Off_point__c Drop : Trigger.new){
   Drop.Distance__c = Drop.distance_calculation__c;
}
}
```

## Phase 4: Data Migration, Testing & Security

## Milestone 8: PROFILES:-

1. Go to setup page >> type Profiles in Quick Find bar >> click on Profiles >> click on 'S'

2. Click on Clone beside Standard Platform User.

3. Under Clone Profile:

Profile Name: NGOs Profile

4. Then click on Save.

## Milestone 9: CREATION OF USERS: -

In our Project we consider them as NGO's

### Activity 1: Creation of User1: -

1. Go to setup page >> type users in Quick Find bar >> click on users>> New user.

2. In General Information give details as: (Note: create users as per your wish NGO's)

- First Name: Iksha Foundation
- Last Name: Iksha_Foundation 28
- Alias: iiksh
- Email: Give Your Email
- Username: ikshafoundation@sb.com (give the username different)
- Nickname: Auto Populated
- User License: Salesforce Platform
- Profile: NGOs Profile
- Active: Check


3. Click on Save.

### Activity 2: Creation of User2 and User3: -

1. Create another Two Users by following steps in Activity - 1 with similar User License and Profile.

2. Give Different First Name, Last Name based on Different NGO’s.

## Milestone 10: PUBLIC GROUPS:-

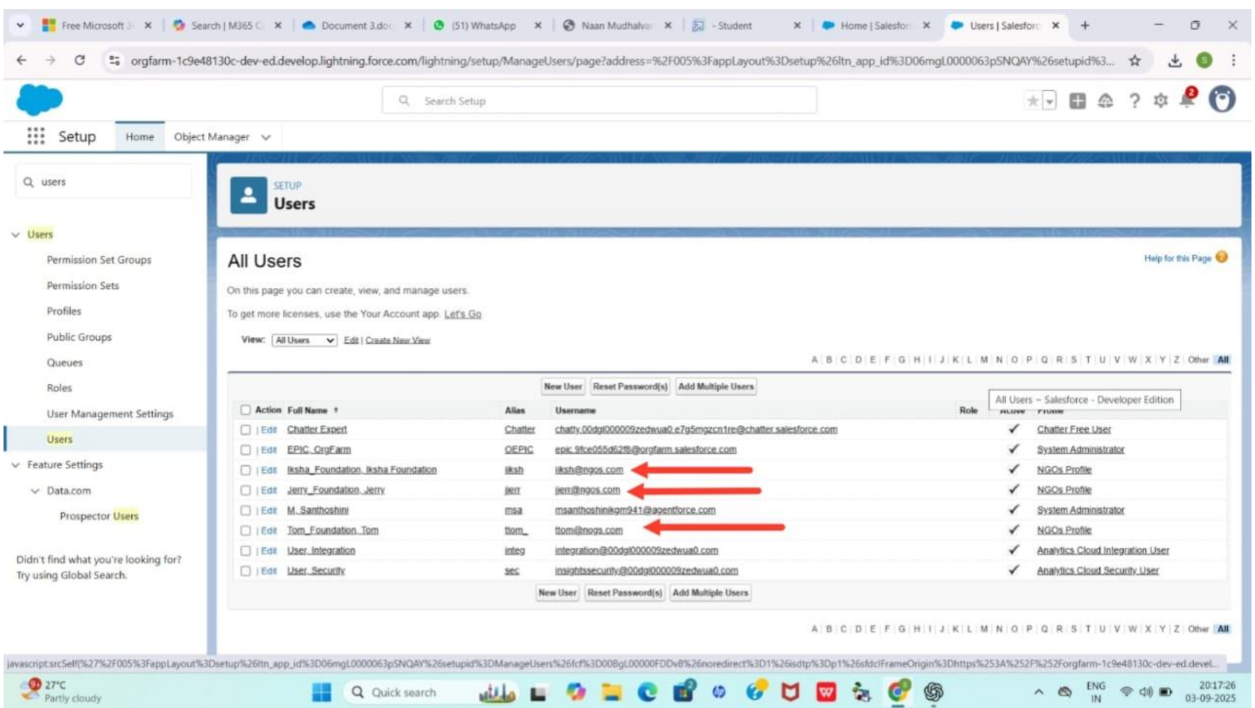
### Activity 1: Creation of Public Group 1:

1. Setup → Quick Find → Public Groups → New

2. Group Info:

- Label: Iksha
- Group Name: Iksha
- Grant Access Using Hierarchies

3. Search: Users



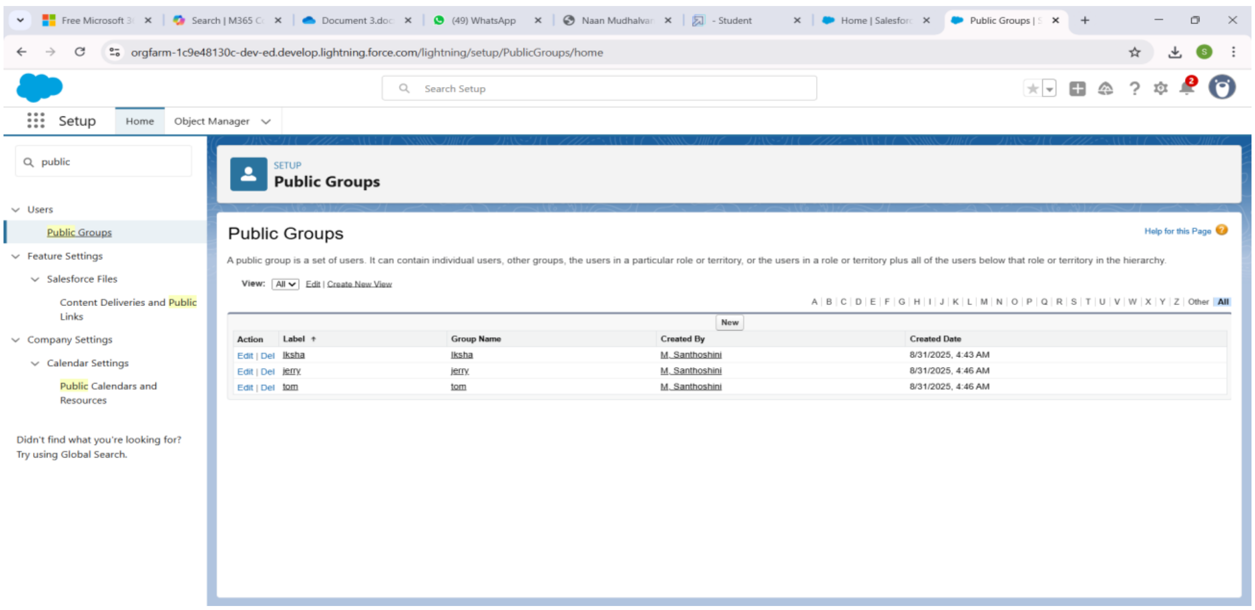

4. Selected Members: Iksha Foundation, System Administrator

5.Click Save.

## Activity 2: Creation of Public Group 2 and 3: -

1. By Following Steps in Activity 1, Create other two Public Groups for other two users.

2. After Saving this would look like this.




# Milestone 11: REPORT TYPES: -

## Activity 1: Creation of Venue with DropOff with Volunteer Reports:-

1. Setup → Quick Find → Report Types → Continue → New Custom Report Type

2. Fill report type details:

- Primary Object: Venues
- Report Type Label: Venue with DropOff with Volunteer
- Report Type Name: Venue_with_DropOff_with_Volunteer
- Description: Venue with DropOff with Volunteer
- Category: Other Reports
- Deployment Status: Deployed

3. Click Next.

4. Under object relationships:

- Relate Drop-Off Points → choose *A records may or may not have related B records*.
- Again, relate Volunteers.

5. Click Save

## Activity 2 : Creation of Volunteers with Execution Details and Tasks:-

1. Setup → Quick Find → Report Types → Continue → New Custom Report Type

2. Define Report Type:

- Primary Object: Volunteer
- Report Type Label: Volunteers with Execution Details and Tasks
- Report Type Name: Volunteers_with_Execution_Details_and_Tasks
- Description: Volunteers with Execution Details and Tasks
- Category: Other Reports
- Deployment Status: Deployed

3. Click Next

4. Relate another object → Execution Details

- Choose: *A records may or may not have related B records*

5. Click Save.

# Milestone 12: REPORTS: -

## Activity 1: Creation of Report on Venue with DropOff with Volunteer: -

1. In FoodConnect App → go to Reports tab.

2. Click New Folder →

- Label: Custom Reports
- Unique Name: CustomReports

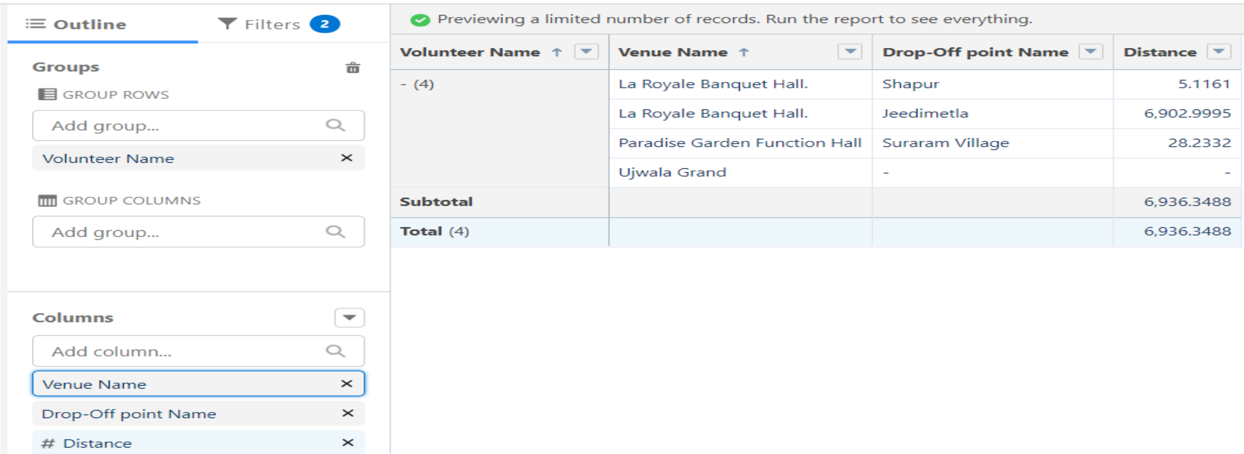
3. Open Custom Reports → click New Report.

4. Select Report Type: Venue with DropOff with Volunteer → Start Report.

5. Report Setup:

- Group Rows: Volunteer Name

- Columns: Venue Name, Drop-Off Point Name, Distance.




6. Click Save & Run →

- Report Name: venue and Drop Off point
- Unique Name: Auto (default)
- Folder: Custom Reports

7. Click Save.

## Activity 2: Creation of Report on Volunteers with Execution Details and Tasks: -

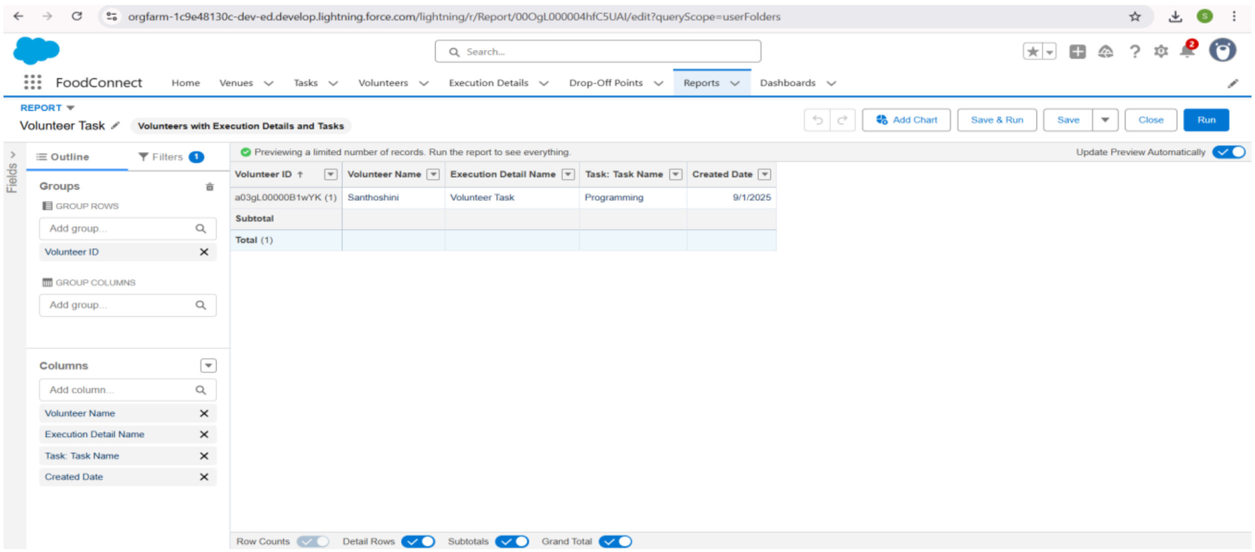
1. In FoodConnect App → go to Reports tab.

2. Open Custom Reports folder → click New Report.

3. Select Report Type: Volunteers with Execution Details and Tasks → click Start Report.

4. Report Setup:

- Group Rows: Volunteer ID
- Columns:
  - Volunteer → Volunteer Name
  - Task → Task Name
  - Execution Detail → Execution Detail Name
  - Created Date



5. Click Save & Run →

- Report Name: Volunteer Task
- Unique Name: Auto (default)
- Folder: Custom Reports

6. Click Save.

## Milestone 12: DASHBOARDS :-

### Activity 1: Adding venue and Drop Off point Report to the Dashboard:-

1. In FoodConnect App → go to Dashboards tab.

2. Click New Folder →

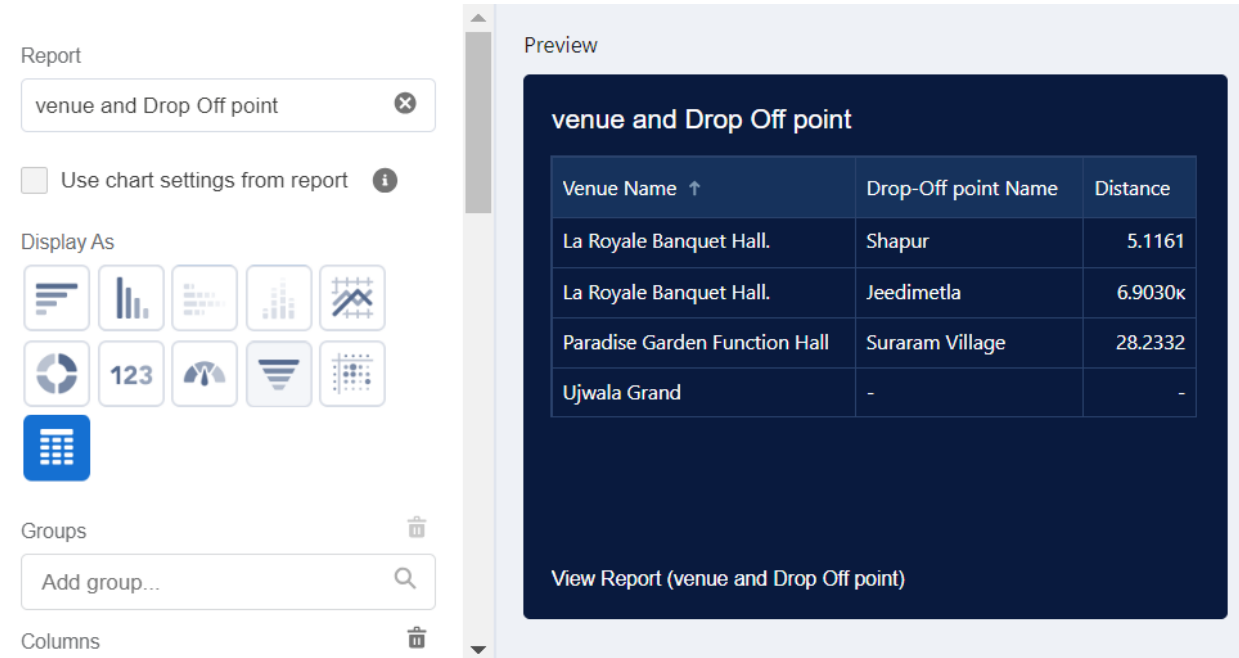
- Label: Custom Dashboards
- Unique Name: Auto (default).

3. Open Custom Dashboards → click New Dashboard.

- Name: Organization Details

4. Add Component:

- Click Widget → Chart/Table
- Select Report: venue and Drop Off point Report → Select
- Display As: Lightning Table
- Theme: Dark (optional)




5. Click Save.

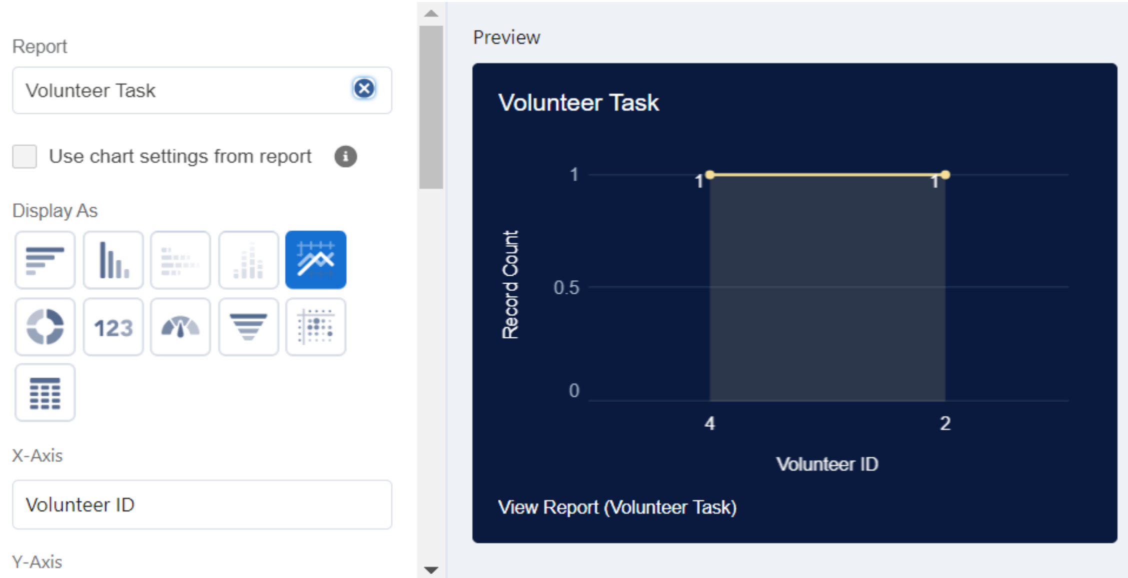
## Activity 2: Adding Volunteer Task Report to the Dashboard: -

1. Click Widget → Chart/Table.

2. In Select Report → choose Volunteer Task Report → click Select.

3. In Add Component:

- Display As: Line Chart
- Theme: Dark (optional)




4. Click Save.

## Activity 3: Adding a Picture to the Dashboard (Optional): -

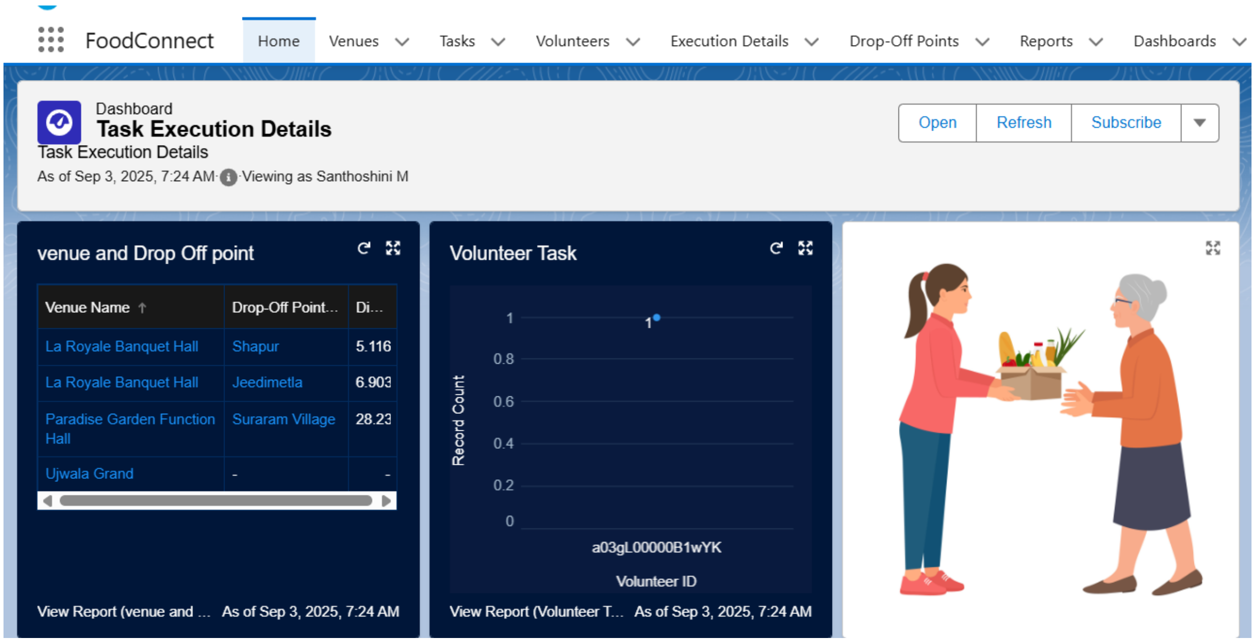
1. Download an image to your system.

2. In Dashboard → Click Widget → Image.

3. Click Browse Files → select the picture → Upload.

4. Save As: Task Execution Details

5. Folder: Custom Dashboards → Select → Save




# Milestone 13: SHARING RULES: -

## Drop-Off Point Sharing Rules Setup:

1. Setup → Quick Find → Sharing Settings

2. Scroll to Drop-Off Point Sharing Rules → click New

## Rule 1

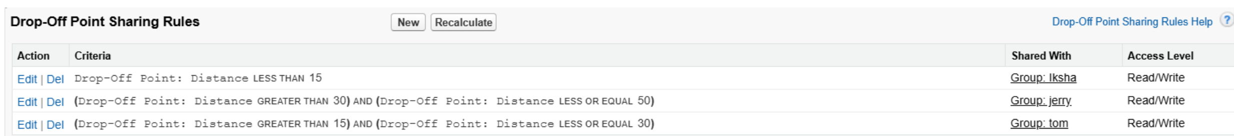
- Label: Rule 1
- Name: Rule_1
- Rule Type: Based on Criteria
- Criteria: Distance: Less than:15
- Share With: Public Group → Iksha
- Save.

## Rule 2

- Label: Rule 2
- Name: Rule_2
- Rule Type: Based on Criteria
- Criteria: Distance: Greater than:15 AND Distance: Less than equal:30
- Share With: Public Group → NSS
- Save.

## Rule 3

- Label: Rule 3
- Name: Rule_3
- Rule Type: Based on Criteria
- Criteria: Distance: Greater than: 30 AND Distance: Less than equal:50
- Share With: Public Group → Street Cause
- Save.


Drop-Off Point Sharing Rules  New  Recalculate  Drop-Off Point Sharing Rules Help

| Action | Criteria | Shared With | Access Level |
|---|---|---|---|
| Edit \| Del | Drop-Off Point: Distance LESS THAN 15 | Group: Iksha | Read/Write |
| Edit \| Del | (Drop-Off Point: Distance GREATER THAN 30) AND (Drop-Off Point: Distance LESS OR EQUAL 50) | Group: jerry | Read/Write |
| Edit \| Del | (Drop-Off Point: Distance GREATER THAN 15) AND (Drop-Off Point: Distance LESS OR EQUAL 30) | Group: tom | Read/Write |

## **Phase 5:** Deployment, Documentation & Maintenance

## Milestone 13: HOME PAGE: -

### Activity 1: Creation of Home Page: -

1. Setup → Quick Find → Lightning App Builder → New

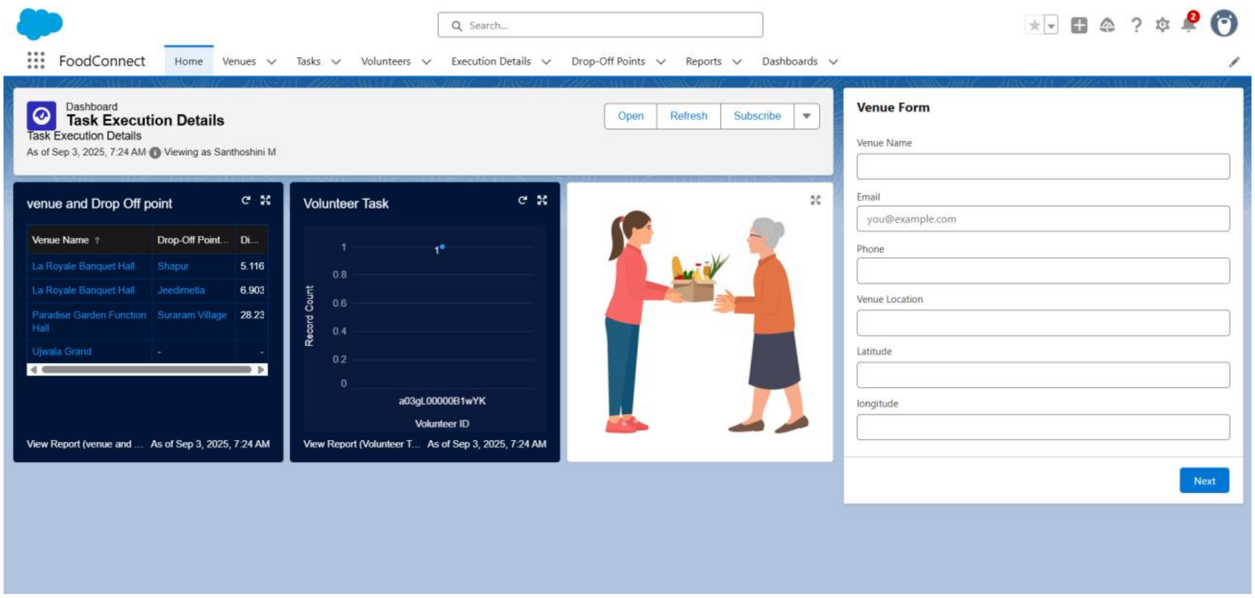
2. Select Home Page → Label: HOME Page → choose Standard Home Page.

3. In Components:

- Drag Flow to right section → set Flow = Venue Flow
- Drag Dashboard to first section

4. Click Save & Activation → choose App Default → Add Assignment → select FoodConnect App → Save

- ➢ Now FoodConnect Home Page shows Venue Flow + Dashboard.




## CONCLUSION: -

By leveraging the Salesforce platform, the project successfully created an efficient and transparent system for managing volunteers, venues, and task executions.

Through proper assignment of tasks, monitoring execution details, and ensuring smooth coordination, the project demonstrated how Salesforce CRM can be customized to support NGO operations effectively.

The project "**To Supply Leftover Food to Poor using Salesforce**" has been successfully implemented and demonstrates the practical application of Salesforce CRM for social good.

## Project Achievements:

- Automated the process of volunteer registration, task allocation, and execution tracking.
- Enabled real-time data access for NGOs to monitor ongoing activities.
- Built custom objects, fields, Flows, and triggers for smooth automation.
- Improved reporting and transparency using Reports, Dashboards, and Sharing Rules.
- Enhanced usability through Lightning App, Home Page, and role-based access.

## Student Learning Outcomes:

- Hands-on experience in Salesforce customization and development.
- Ability to solve real-world NGO management challenges using CRM.
- Gained teamwork experience in requirement gathering, analysis, and testing.

- Exposure to Salesforce project lifecycle and industry-relevant tools.

## Future Scope:

- Integration with mobile apps for volunteers and NGOs for faster communication.
- Use of AI/analytics to monitor volunteer performance and predict NGO requirements.
- Expansion to manage multiple NGOs and regions in a single Salesforce org.
- Collaboration with government agencies and social organizations for larger outreach.