



To supply leftover food to poor



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Project Overview:

This CRM enables efficient redistribution of surplus food from donors—such as restaurants, events, and households—to recipients—like charities, shelters, and volunteers—through a unified platform. Donors can quickly submit listings with details like type, quantity, expiry, and pickup window. The system then leverages geo-location matching and real-time notifications to streamline scheduling, routing, pickup tracking, and compliance. Impact tracking (e.g., meals rescued, volunteer hours, CO₂ saved) and robust communication tools ensure transparency, efficiency, and safety across operations.

Key features include:

- **Donor & Recipient Management:** Enable registration and detailed profiles for donors (with donation history) and recipients/volunteers for effective matching and communication.
- **Food Listings with Real-Time Notifications:** Post surplus items quickly; notify stakeholders instantly.
- **Geo-Matching & Routing:** Auto-match donations to nearby NGOs/volunteers and optimize pickup routes via geolocation APIs.
- **Volunteer Scheduling & Logistics:** Assign pickup tasks, set dates/times, and send reminders—streamlining volunteer coordination.
- **Impact Reporting & Analytics:** Track meals distributed, CO₂ emissions saved, and more.
- **Impact Reporting & Analytic:** Monitor expiry dates and maintain audit trails.
- **Secure, Mobile-Ready Platform:** Accessible anytime, anywhere with robust data protection.

Business Benefits:

- **Reduce Food Waste:** Quickly match surplus with need to prevent spoilage.
- **Boost Community Engagement:** Reliable system builds trust among donors, NGOs, and volunteers.
- **Improve Efficiency:** Automations free the team to focus on strategy and outreach.

- **Enable Impact Transparency:** Use data to engage stakeholders, secure funding, and report results.
- **Ensure Safety & Compliance:** Maintain records for food safety and organizational accountability.

This CRM system meets critical business needs by addressing food insecurity, reducing food waste, and enhancing the efficiency of charitable food distribution efforts. It helps organizations work more effectively, ensuring that no food goes to waste while supporting those in dire need.

Objectives:

The primary goal of building the FOODCONNECT CRM is to centralize donor, volunteer, and recipient data to streamline coordination and reduce administrative effort—enhancing operational efficiency. It also aims to automate workflows and notifications for surplus food listings, pickups, and deliveries, minimizing spoilage and maximizing meals rescued. By enabling geolocation-based matching and route planning, it ensures rapid, cost-effective distribution. Additionally, the CRM will track impact metrics (such as meals saved and volunteer hours) to reinforce transparency and bolster stakeholder engagement. Finally, it supports safety and compliance monitoring, giving confidence to partners and preparing the initiative for sustainable growth. These objectives align with key nonprofit CRM outcomes: better relationship management, automated operations, improved volunteer engagement, and impactful reporting.

Phase 1: Requirement Analysis & Planning

Understanding Business Requirements: The key requirement of this project is to establish an organized platform that connects restaurants, hotels, and event organizers willing to donate leftover food with NGOs or volunteer groups who can distribute it to the poor. The system needs to efficiently track food availability, coordinate pickups and deliveries, monitor beneficiary reach, and maintain transparent records. Users require a solution that minimizes manual coordination, prevents food spoilage, and ensures that surplus food is safely and quickly routed to the needy.

Defining Project Scope and Objectives:

- Develop a CRM system on Salesforce to register and manage profiles of donors (restaurants, hotels) and recipients (NGOs, shelters, volunteer groups).
- Automate the process of scheduling pickups and assigning delivery tasks based on food type, quantity, and location.
- Maintain historical records of donations and distributions to enable tracking and reporting.
- Implement notifications and reminders for timely pickups, and acknowledgements to donors after successful delivery.

- Generate insightful dashboards to visualize the amount of food saved, number of beneficiaries served, and partner engagement, aiding in promoting the initiative and attracting new donors.

Design Data Model and Security Model:

The data model includes custom objects like Donor, Food Donation, Pickup Schedule, Recipient, and Distribution Record, linked through appropriate relationships to maintain a clear trail from donation to delivery. The security model employs profiles and role hierarchies to ensure that restaurant managers, NGO coordinators, and volunteer drivers have access only to the data relevant to their roles. Permission sets and sharing rules are configured to maintain data privacy while supporting collaborative workflows among multiple partners.

Phase 2: Salesforce Development - Backend & Configurations

Setup environment & DevOps workflow: A dedicated Salesforce sandbox environment was set up for the development and initial testing of the FOODCONNECT CRM. This enabled isolated customization without impacting production data. A simple DevOps process was followed using Change Sets to migrate metadata from the sandbox to production, ensuring controlled deployments and version management.

Customization of Objects, Fields, Validation Rules, Automation:

Create Venue Object

To create an object:

1. Setup → Object Manager → Create → Custom Object.
2. Name the object “Venue” (singular), plural label “Venues.”
3. Set Record Name as “Venue Name” with Data Type: Text.
4. Enable Allow Reports, Track Field History, Allow Activities, and Allow Search.
5. Click Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a cloud icon, 'Setup', 'Home', and 'Object Manager'. A search bar says 'Search Setup'. On the right are standard icons for star, plus, refresh, question, gear, and bell. The main area shows 'SETUP > OBJECT MANAGER' and 'Venue'. The left sidebar has a 'Details' tab selected, listing various configuration options like Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The right panel also has a 'Details' tab with fields for Description, API Name (set to 'Venue__c'), Singular Label ('Venue'), Plural Label ('Venues'), and checkboxes for Enable Reports, Track Activities, Track Field History, Deployment Status (set to 'Deployed'), Help Settings, and Standard salesforce.com Help Window.

Create Drop-Off Point Object

To create an object:

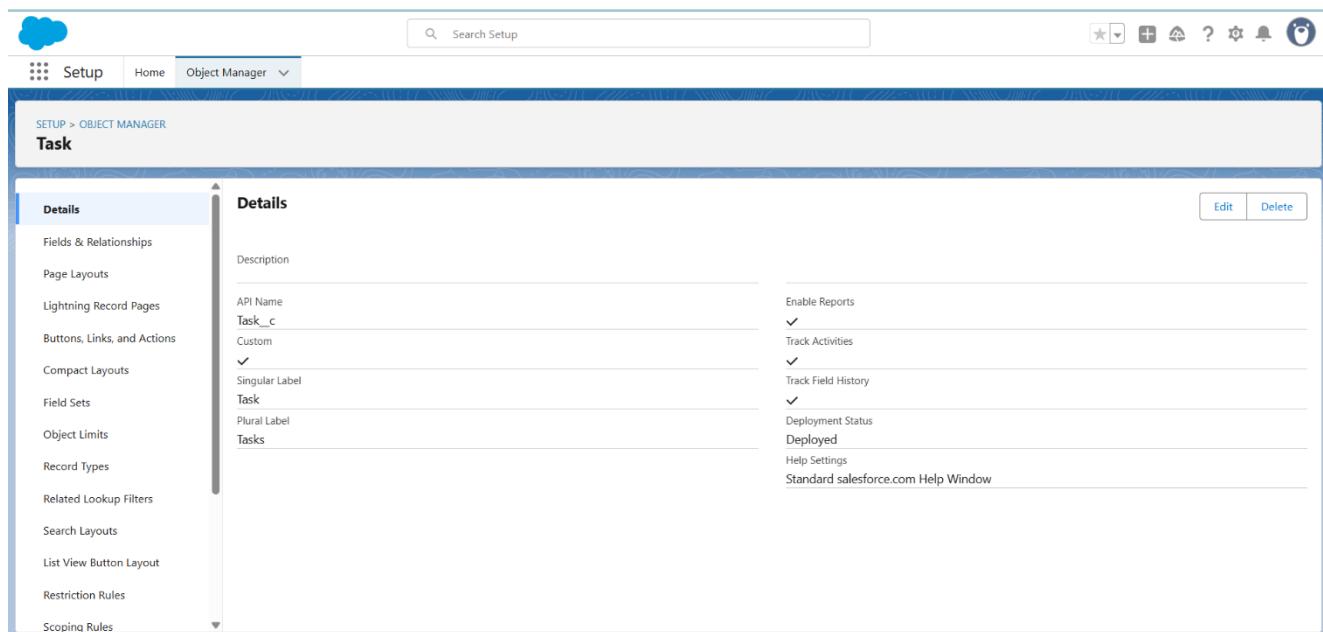
1. Go to **Setup** → **Object Manager** → **Create** → **Custom Object**.
2. Set **Label** = Drop-Off Point, **Plural Label** = Drop-Off Points.
3. Define **Record Name**: Drop-Off Point Name (Data Type = Text).
4. Enable **Allow Reports**, **Track Field History**, **Allow Activities**, and **Allow Search**.
5. Click **Save**.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a cloud icon, 'Setup', 'Home', and 'Object Manager'. A search bar says 'Search Setup'. On the right are standard icons for star, plus, refresh, question, gear, and bell. The main area shows 'SETUP > OBJECT MANAGER' and 'Drop-Off Point'. The left sidebar has a 'Details' tab selected, listing various configuration options like Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The right panel also has a 'Details' tab with fields for Description, API Name (set to 'Drop_Off_Point__c'), Singular Label ('Drop-Off Point'), Plural Label ('Drop-Off Points'), and checkboxes for Enable Reports, Track Activities, Track Field History, Deployment Status (set to 'Deployed'), Help Settings, and Standard salesforce.com Help Window.

Create Task Object

To create an object:

1. Setup → Object Manager → Create → Custom Object.
2. Label: **Task** | Plural Label: **Tasks**.
3. Record Name: **Task Name** (Data Type: Text).
4. Enable **Allow Reports, Track Field History, Allow Activities, Allow Search**.
5. Click **Save**.



Create Volunteer Object

To create an object:

1. Setup → Object Manager → Create → Custom Object.
2. Set: **Label** = Volunteer, **Plural Label** = Volunteers, **Record Name** = Volunteer Name (Text).
3. Enable: **Allow Reports, Track Field History, Allow Activities, Allow Search**.
4. Hit **Save**.

The screenshot shows the Salesforce Setup interface under the Object Manager. The left sidebar lists various configuration options for the 'Volunteer' object, including 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, and Scoping Rules. The main details pane shows the 'Details' tab for the 'Volunteer' object. It includes fields for Description, API Name (set to 'Volunteer__c'), Singular Label ('Volunteer'), and Plural Label ('Volunteers'). On the right, there are checkboxes for enabling Reports, Activities, and Field History, all of which are checked. Deployment status is set to 'Deployed'. A help link for 'Standard salesforce.com Help Window' is also present. At the top right of the details pane are 'Edit' and 'Delete' buttons.

Create Execution Details Object

To create an object:

1. Setup → Object Manager → Create → Custom Object.
2. Set: **Label** = Execution Detail, **Plural Label** = Execution Details, **Record Name** = Execution Detail Name (Text).
3. Enable **Allow Reports, Track Field History, Allow Activities, Allow Search**.
4. Hit Save.

The screenshot shows the Salesforce Setup interface under the Object Manager. The left sidebar lists various configuration options for the 'Execution Detail' object, including 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, and Restriction Rules. The main details pane shows the 'Details' tab for the 'Execution Detail' object. It includes fields for Description, API Name (set to 'Execution_Detail__c'), Singular Label ('Execution Detail'), and Plural Label ('Execution Details'). On the right, there are checkboxes for enabling Reports, Activities, and Field History, all of which are checked. Deployment status is set to 'Deployed'. A help link for 'Standard salesforce.com Help Window' is also present. At the top right of the details pane are 'Edit' and 'Delete' buttons.

Creation of Relationship fields in objects

Creation of Lookup Relationship Field on Volunteer Object:

1. Setup → Object Manager → Volunteer → Fields & Relationships → New.
2. Choose **Master-Detail Relationship**, click **Next**.
3. Select **Drop-Off Point**, click **Next**.
4. Field Name: **Drop_off_point** (Label auto-generated) → Click **Next** twice → **Save**.

The screenshot shows the Salesforce Object Manager interface for creating a custom field. The left sidebar has a 'Fields & Relationships' tab selected. The main area shows a 'Custom Field Definition Detail' for a field named 'Drop-Off Point' on the 'Volunteer' object. The field is defined as a 'Master-Detail' type, related to the 'Drop-Off Point' object. The 'Master-Detail Options' section indicates that 'Volunteers' is the child relationship name. The 'Field Information' section shows the field label and name, and the 'Master-Detail Options' section shows the related object and sharing settings.

Creation of Master Detail Relationship Field on Execution Details Object:

8. Setup → Object Manager → Execution Details → Fields & Relationships → New.
9. Select **Master-Detail Relationship**, click **Next**.
10. Choose **Volunteer**, click **Next**.
11. Field Name: **Volunteer** (Label auto-generated) → click **Next** twice → **Save**.
- 12.

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, Setup Home, Object Manager.
- Breadcrumbs:** SETUP > OBJECT MANAGER Execution Detail
- Left Sidebar (Fields & Relationships):**
 - 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
- Custom Field Definition Detail:**
 - Execution Detail Custom Field Volunteer**
 - [Back to Execution Detail](#)
 - [Validation Rules \[0\]](#)
 - [Edit](#) | [Set Field-Level Security](#) | [View Field Accessibility](#) | [Where is this used?](#)
- Field Information:**

Field Label	Volunteer	Object Name	Execution Detail
Field Name	Volunteer	Data Type	Master-Detail
API Name	Volunteer__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	tejaswini.kataru, 7/11/2025, 2:11 AM	Modified By	tejaswini.kataru, 7/11/2025, 2:11 AM
- Master-Detail Options:**

Related To	Volunteer	Child Relationship Name	Execution_Details
Related List Label	Execution Details		
Sharing Setting	Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		
Representable Master Detail	<input type="checkbox"/>		
- Lookup Filter:**

Creation of Master Detail Relationship Field on Execution Details Object :

13. Setup → Object Manager → Execution Details → Fields & Relationships → New.
14. Select **Master-Detail Relationship**, click **Next**.
15. Choose **Task** as the related object → click **Next**.
16. Set Field Name: **Task** (Label auto-generated) → click **Next** twice → **Save**.

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

17. Setup → Object Manager → Drop-Off Point → Fields & Relationships → New.
18. Select **Lookup Relationship**, click **Next**
19. Choose **Venue** as the related object, click **Next**
20. Field Name: **Venue**, Label auto-generated → click **Next** twice → **Save**.

Creation of Lookup Relationship Field on Task Object:

21. Setup → Object Manager → Task → Fields & Relationships → New
22. Choose **Lookup Relationship**, then Next
23. Select **Venue** as the related object → Next
24. Field Name: **Sponsored_By** (label auto-generated) → click **Next** twice → **Save**.

The screenshot shows the Salesforce Object Manager interface for creating a custom field. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main title is 'Task'. On the left, a sidebar under 'Fields & Relationships' lists various options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The central panel displays the 'Task Custom Field Sponsored_By' setup page. It shows the 'Custom Field Definition Detail' section with fields like 'Field Label' (Sponsored_By), 'Field Name' (SponsoredBy), 'API Name' (SponsoredBy_c), 'Object Name' (Task), and 'Data Type' (Lookup). Below this is the 'Lookup Options' section, which includes 'Related To' (Venue), 'Related List Label' (Tasks (Sponsored_By)), and 'Child Relationship Name' (Tasks1). The bottom of the page has sections for 'Validation Rules (0)', 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. A help icon and a scroll bar are visible on the right.

Creation of Lookup Relationship Field on Task Object:

25. Setup → Object Manager → Task → Fields & Relationships → New
26. Select **Lookup Relationship** → click **Next**
27. Choose **Drop-Off Point** as the related object → click **Next**
28. Field Name: **Drop_Off_Point** (label auto-generated) → **Next** twice → **Save**.

The screenshot shows the Salesforce Setup interface with the following details:

Object Manager: Task

Custom Field Definition Detail for **Drop-Off Point**:

- Field Information**:
 - Field Label: Drop-Off Point
 - Field Name: Drop_Off_Point
 - API Name: Drop_Off_Point_c
 - Description: Help Text
 - Data Owner: Field Usage
 - Data Sensitivity Level: Compliance Categorization
- Created By: tejaswini.kataru, 7/11/2025, 2:27 AM
- Modified By: tejaswini.kataru, 7/11/2025, 2:27 AM
- Object Name**: Task
- Data Type**: Lookup

Lookup Options:

- Related To: Drop-Off Point
- Related List Label: Tasks
- Required:

What to do if the lookup record is deleted? Clear the value of this field.

Help for this Page

Creation of fields for the Venue object :

1. Setup → Object Manager → Venue → Fields & Relationships → New.
2. Choose **Email** data type → Next
3. Set **Field Label & Field Name** to **Contact Email**, mark as **Required**.
4. Click **Next** → **Next** → **Save**

The screenshot shows the Salesforce Setup interface with the following details:

Object Manager: Venue

Custom Field Definition Detail for **Contact Email**:

- Field Info**:
 - Venue Custom Field: Contact Email - Salesforce - Developer Edition
 - Field Label: Contact Email
 - Field Name: Contact_Email
 - API Name: Contact_Email_c
 - Description: Help Text
 - Data Owner: Field Usage
 - Data Sensitivity Level: Compliance Categorization
- Created By: tejaswini.kataru, 7/11/2025, 2:30 AM
- Modified By: tejaswini.kataru, 7/11/2025, 2:30 AM
- Object Name**: Venue
- Data Type**: Email

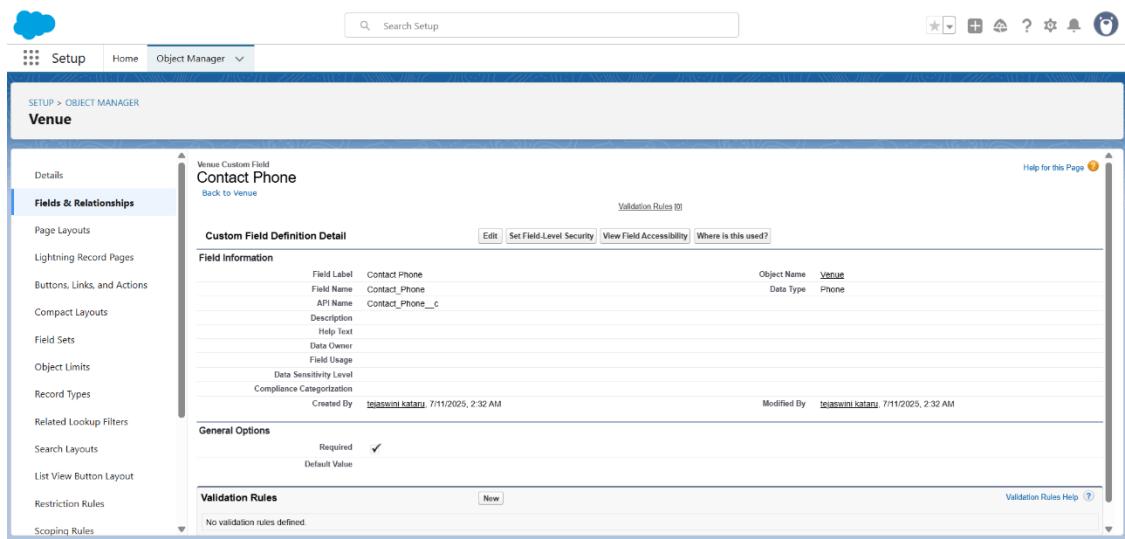
General Options:

- Required:
- Unique:
- External ID:
- Default Value:

Validation Rules Validation Rules Help

To create another fields in an object:

5. Setup → Object Manager → Venue → Fields & Relationships → New.
6. Select **Phone** as the data type → **Next**.
7. Set **Field Label** and **Field Name** to **Contact Phone**, then mark as **Required**
8. Click **Next** → **Next** → **Save & New**



To create another fields in an object:

1. Setup → Object Manager → Venue → Fields & Relationships → New.
2. Choose **Geolocation** as the data type → **Next**
3. Set: **Field Label**: Location, **Decimal Places**: 4, **Field Name**: Location, **Field Name**: Location.
4. Click **Next** → **Next** → **Save & New**.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main content area is titled 'SETUP > OBJECT MANAGER' and 'Venue'. On the left, a sidebar lists various setup options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The 'Fields & Relationships' tab is selected. The right pane shows the 'Custom Field Definition Detail' for a field named 'Location'. The 'Field Information' section shows the field label 'Location', field name 'Location', API name 'Location__c', and a description 'Enter the Geolocation of your Venue'. The 'Data Type' is listed as 'Geolocation'. The 'General Options' section shows 'Required' is unchecked. The 'Geolocation Options' section shows 'Decimal' is set to 4. The bottom of the pane shows the field was created by 'tejaswini katru' on 7/11/2025, 2:34 AM and modified by 'tejaswini katru' on 7/11/2025, 2:34 AM.

To create other fields in an object:

9. Setup → Object Manager → Venue → Fields & Relationships → New.
10. Choose **Long Text Area**, click **Next**.
11. Enter: **Field Label**: Venue Location, **Field Name**: Venue_Location.
12. Click **Next** → **Next** → **Save** (as per Salesforce custom field creation workflow).

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main content area is titled 'SETUP > OBJECT MANAGER' and 'Venue'. On the left, a sidebar lists various setup options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The 'Fields & Relationships' tab is selected. The right pane shows the 'Custom Field Definition Detail' for a field named 'Venue Location'. The 'Field Information' section shows the field label 'Venue Location', field name 'Venue_Location', API name 'Venue_Location__c', and a description. The 'Data Type' is listed as 'Long Text Area'. The 'General Options' section shows 'Default Value'. The 'Long Text Area Options' section shows '# Visible Lines' is set to 3 and 'Length' is 32,768. The bottom of the pane shows the field was created by 'tejaswini katru' on 7/11/2025, 2:36 AM and modified by 'tejaswini katru' on 7/11/2025, 2:36 AM.

Creation of fields for the Drop-Off point object:

1. Setup → Object Manager → Drop-Off Point → Fields & Relationships → New
2. Choose Geolocation → Next
3. Enter: Field Label: Location 2, **Field Name**: auto-generated, **Description**: Enter the Geolocation of the Drop off Point, **Options**: Decimal, **Decimal Places**: 4.
4. Click **Next** → **Next** → **Save & New**.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and various system icons. The main title is 'SETUP > OBJECT MANAGER Drop-Off Point'. On the left, a sidebar lists options like 'Details', 'Fields & Relationships' (which is selected), and various layout-related items. The main content area displays the 'Custom Field Definition Detail' for 'Drop-Off Point Custom Field Location 2'. It shows the field label 'Location 2', field name 'Location_2', API name 'Location_2_c', and a description 'Enter the Geolocation of the Drop off Point'. The 'Data Type' is listed as 'Geolocation'. The 'Object Name' is 'Drop-Off Point'. Under 'General Options', 'Required' is checked. Under 'Geolocation Options', 'Decimal' is checked and 'Decimal Places' is set to 4. The 'Created By' and 'Modified By' fields both show 'tejaswini.katru' with the timestamp '7/11/2025, 2:38 AM'.

To create another fields in an object:

1. Setup → Object Manager → Drop-Off Point → Fields & Relationships → New.
2. Choose **Formula** → Next
3. Set: **Field Label**: distance calculation, **Field Name**: distance_calculation, **Return Type**: Number.
4. In the formula editor, use: DISTANCE(Location_2__c, Venue__r.Location__c, 'km')
5. Click **Next** → **Next** → **Save & New**.

SETUP > OBJECT MANAGER

Drop-Off Point

Custom Field Definition Detail

Field Information

- Field Label: distance calculation
- Field Name: distance_calculation
- API Name: Drop-Off Point Custom Field: distance calculation ~ Salesforce - Developer Edition
- Description:
- Help Text:
- Data Owner:
- Field Usage:
- Data Sensitivity Level:
- Compliance Categorization:
- Created By: tejaswini kataru, 7/11/2025, 2:50 AM
- Modified By: tejaswini kataru, 7/11/2025, 2:50 AM

Formula Options

- Data Type: Formula
- Decimal Places: 2
- Formula: DISTANCE(Location_2__c, Venue__r.Location__c, 'km')

To create another fields in an object:

5. Setup → Object Manager → Drop-Off Point → Fields & Relationships → New.
6. Select **Picklist** → Next
7. Set: **Field Label**: State, **Field Name**: State, **Values**: Enter all Indian States and UTs (one per line).
8. Mark **Required** → Next → Next → Save and new.

SETUP > OBJECT MANAGER

Drop-Off Point

Custom Field Definition Detail

Field Information

- Field Label: State
- Field Name: State
- API Name: State__c
- Description:
- Help Text:
- Data Owner:
- Field Usage:
- Data Sensitivity Level:
- Compliance Categorization:
- Created By: tejaswini kataru, 7/11/2025, 2:53 AM
- Modified By: tejaswini kataru, 7/11/2025, 2:53 AM

General Options

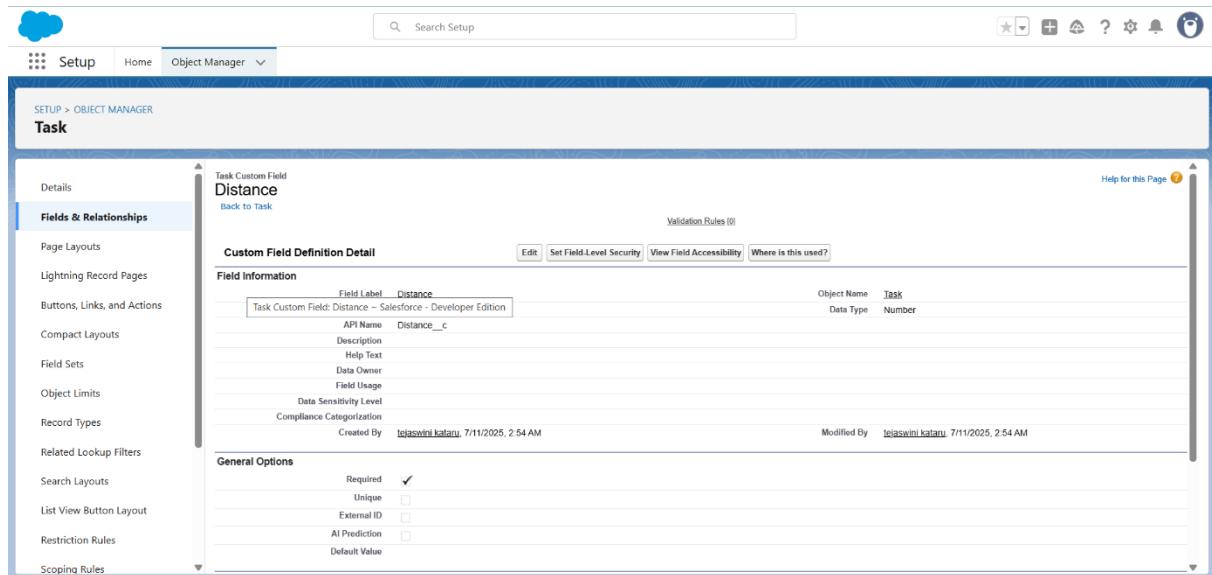
- Required:
- Default Value:

Picklist Options

- Restrict picklist to the values defined in the value set:
- Controlling Field:

To create another fields in an object:

9. Setup → Object Manager → Task → Fields & Relationships → New
10. Select **Number** → Next
11. Label/Name: Distance | Length: 14 | Decimal Places: 4 | Required
12. Next → Next → Save & New.



Creation of fields for the Task object:

1. Setup → Object Manager → Task → Fields & Relationships → New.
2. Select Auto Number → Next.
3. Label: Task ID.
4. Display Format: TASK-{0}.
5. Starting Number: 1.
6. (check Required).
7. Next → Next → Save & New.

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, Home, Object Manager.
- Breadcrumb:** SETUP > OBJECT MANAGER > Task.
- Section:** Fields & Relationships.
- Custom Field Definition Detail:**
 - Field Information:** Field Label: Task ID, Field Name: Task_ID, API Name: Task__ID_C, Description: Help Text, Data Owner: Field Usage, Data Sensitivity Level: Compliance Categorization, Created By: tejaswini.kataru, 7/11/2025, 3:00 AM, Modified By: tejaswini.kataru, 7/11/2025, 3:00 AM.
 - General Options:** External ID:
 - Auto Number Options:** Display Format: TASK-[0]
- Help:** Help for this Page.

To create another fields in an object:

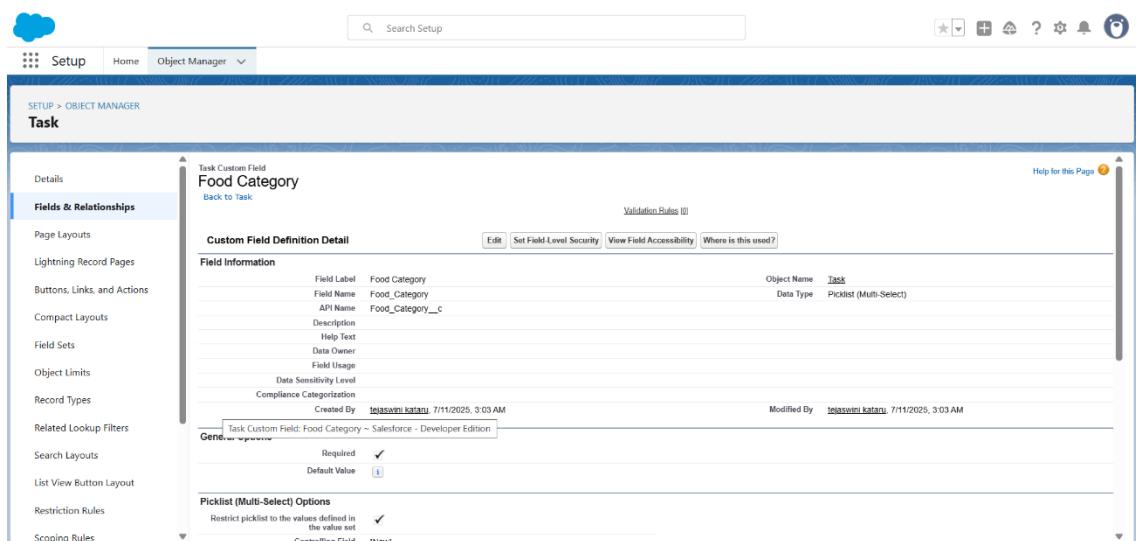
1. Setup → Object Manager → Task → Fields & Relationships → New
2. Select **Date** → Next
3. Label/Name: Date (check Required)
4. Next → Next → Save & New.

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, Home, Object Manager.
- Breadcrumb:** SETUP > OBJECT MANAGER > Task.
- Section:** Fields & Relationships.
- Custom Field Definition Detail:**
 - Field Information:** Field Label: Date, Field Name: Date, API Name: Date__C, Description: Help Text, Data Owner: Field Usage, Data Sensitivity Level: Compliance Categorization, Created By: tejaswini.kataru, 7/11/2025, 3:38 AM, Modified By: tejaswini.kataru, 7/22/2025, 10:36 AM.
 - General Options:** Required: Default Value:
 - Validation Rules:** No validation rules defined.
- Help:** Help for this Page.

To create another fields in an object:

5. Setup → Object Manager → Task → Fields & Relationships → New
6. Select “Picklist (Multi-Select)” → Next
7. Label/API Name: Food Category
8. Values (one per line):
 - 9. Veg
 - 10. Non-Veg
 - 11. Salad
 - 12. Snack
13. Required → Next → Next → Save & New.



To create another fields in an object:

9. Setup → Object Manager → Task → Fields & Relationships → New
10. Select “Number” → Next
11. Label/API Name: Number of People Served / Number_of_People_Served 12. Required → Next → Next → Save & New.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Task'. On the left, a sidebar lists various setup categories like 'Page Layouts', 'Buttons, Links, and Actions', and 'Field Sets'. The current section is 'Fields & Relationships'. The main content area displays a 'Custom Field Definition Detail' for 'Task Custom Field Number of People Served'. The 'Field Information' section shows the field label 'Number of People Served', field name 'Number_of_People_Served', API name 'Number_of_People_Served_c', and data type 'Number'. The 'General Options' section includes checkboxes for 'Required' (checked), 'Unique', 'External ID', 'AI Prediction', and 'Default Value'. A note at the bottom indicates the field was created by 'tejaswini.katru' on 7/11/2025, 3:06 AM.

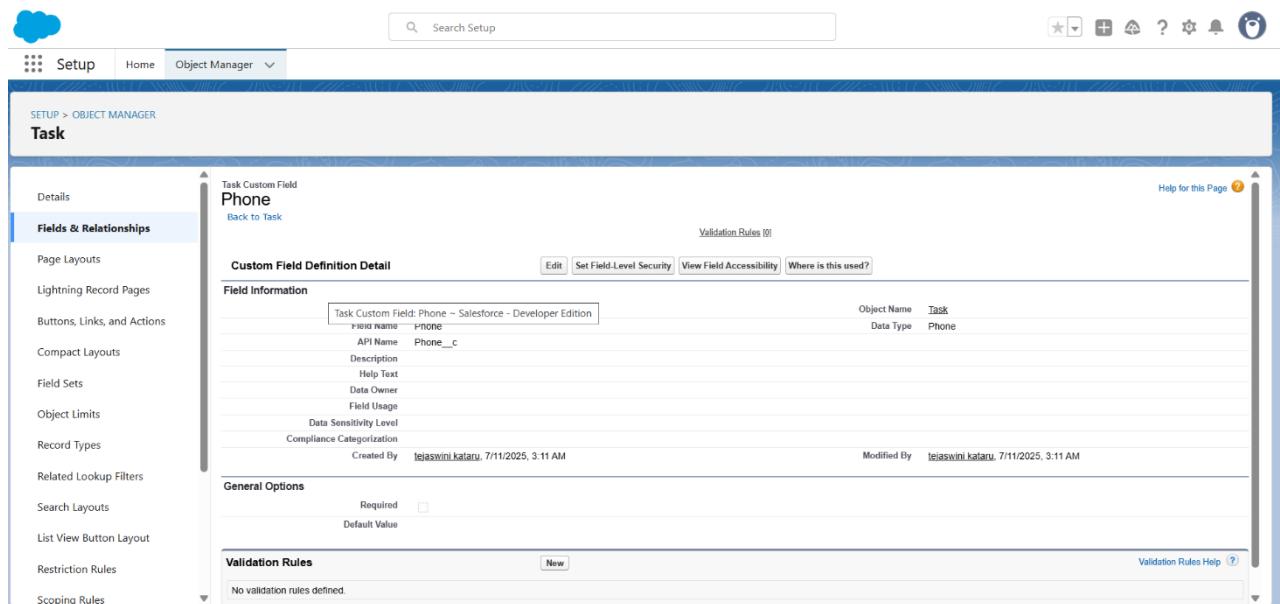
To create another fields in an object:

13. Setup → Object Manager → Task → Fields & Relationships → New
14. Select “Text” → Next
15. Label/API Name: Name of the Person / Name_of_the_Person
16. Next → Next → Save & New.

This screenshot shows the continuation of creating a new custom field. The setup steps have moved to the next screen. The 'Fields & Relationships' section is still selected. The new field is named 'Name of the Person' with API name 'Name_of_the_Person_c'. It has a data type of 'Text'. The 'General Options' section shows 'Required' is unchecked. Other options like 'Unique', 'Case Sensitive', 'External ID', and 'Default Value' are also present. The field was created by 'tejaswini.katru' on 7/11/2025, 3:09 AM.

To create another fields in an object:

17. Setup → Object Manager → Task → Fields & Relationships → New
18. Select “Phone” → Next
19. Label/API Name: Phone
20. Next → Next → Save & New .



To create another fields in an object:

21. Setup → Object Manager → Task → Fields & Relationships → New
22. Select “Picklist” → Next
23. Label/API Name: Rating
24. Values (one per line):
30. Next → Next → Save & New.

The screenshot shows the Salesforce Setup interface under the Object Manager for the Task object. A custom field named "Rating" is being created. The field is of type "Picklist" and contains a single value "Rating". It is marked as "Required". Other settings include "Help Text" and "Data Owner". The "Validation Rules" section is visible at the bottom.

To create another fields in an object:

25. Setup → Object Manager → [Your Object] → Fields & Relationships → New
26. Select “Long Text Area” → Next
27. Label/API Name: Feedback
28. Next → Next → Save & New

The screenshot shows the Salesforce Setup interface under the Object Manager for the Task object. A custom field named "Feedback" is being created. The field is of type "Long Text Area" and has settings for "Visible Lines" (3) and "Length" (32,768). The "Validation Rules" section is visible at the bottom.

Creation of fields for the Volunteer object:

1. **Setup → Object Manager** → search for **Volunteer** → open it.
2. **Fields & Relationships → New.**
3. Choose **Auto Number** → **Next**.
4. Enter **Field Label** = “Volunteer ID” (Field Name auto-fills).
5. Check **Required** → **Next** → **Next** → **Save & New**.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A custom field named 'Volunteer ID' is being created under the 'Volunteer' object. The 'Field Information' section shows the field label as 'Volunteer ID', field name as 'Volunteer_ID', API name as 'Volunteer__ID__c', and data type as 'Auto Number'. The 'General Options' section has 'External ID' unchecked. The 'Auto Number Options' section contains the note 'Volunteer Custom Field: Volunteer ID - Salesforce - Developer Edition'.

To create another fields in an object:

1. Go to **Setup → Object Manager** → search and select **Volunteer**.
2. Click **Fields & Relationships → New**.
3. Choose **Picklist** as the data type → **Next**.
4. Set **Field Label** = *Gender* (Field Name auto-fills).
5. Under values, enter each on a new line:
 - Female.
 - Male.
6. Click **Next** → **Next** → **Save & New**.

To create another fields in an object:

7. **Setup → Object Manager** → search for and select Volunteer.
8. Click **Fields & Relationships** → **New**.
9. Select **Date** as the data type → **Next**.
10. Set:
 - **Field Label** = *Available On* (Field Name auto-fills)
 - Check **Required**
11. Click **Next** → **Next** → **Save & New** (or **Save** to finish).

To create another fields in an object:

1. Setup → Object Manager → Volunteer
2. Fields & Relationships → New → Number → Next
3. Field Label: Age (API Name auto-populates)
4. Check Required → Next → Next → Save & New.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes a cloud icon, 'Setup', 'Home', and 'Object Manager'. A search bar says 'Search Setup' and various global icons are on the right. The main area shows 'SETUP > OBJECT MANAGER' and 'Volunteer'. On the left, a sidebar lists options like 'Details', 'Fields & Relationships' (which is selected), and 'Page Layouts'. The main content area displays a 'Custom Field Definition Detail' for a 'Volunteer Custom Field' named 'Age'. It shows the field label 'Age', API name 'Age__c', and data type 'Number'. The 'Field Information' section includes fields for Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'General Options' section has checkboxes for 'Required' (which is checked), 'Unique', 'External ID', 'AI Prediction', and 'Default Value'. The 'Created By' and 'Modified By' fields show 'tejaswini.katari' with the timestamp '7/11/2025, 3:21 AM'.

To create another fields in an object:

1. Setup → Object Manager → Volunteer
2. Fields & Relationships → New → Email → Next
3. Label: Email (API Name auto-fills)
4. ✓ Required → Next → Next → Save & New.

The screenshot shows the Salesforce Setup interface with the following details:

- Setup > OBJECT MANAGER**
- Volunteer**
- Fields & Relationships** tab selected.
- Custom Field Definition Detail** for **Email**.
- Field Information**:
 - Field Label: Email
 - Field Name: Email
 - API Name: Email__c
 - Description: Help Text
 - Data Owner: Field Usage
 - Data Sensitivity Level: Compliance Categorization
 - Created By: tejaswini.kataru, 7/11/2025, 3:22 AM
 - Object Name: Volunteer
 - Data Type: Email
 - Modified By: tejaswini.kataru, 7/11/2025, 3:22 AM
- General Options**:
 - Required:
 - Unique:
 - External ID:
 - Default Value: [Blank]
- Validation Rules**: [New] button.

To create another fields in an object:

1. Setup → Object Manager → Volunteer
2. Fields & Relationships → New → Number → Next
3. Label: Contact Number (API Name auto-fills)
4. Required → Next → Next → Save & New.

The screenshot shows the Salesforce Setup interface with the following details:

- Setup > OBJECT MANAGER**
- Volunteer**
- Fields & Relationships** tab selected.
- Custom Field Definition Detail** for **Contact Number**.
- Field Information**:
 - Field Label: Contact Number
 - Field Name: Contact_Number
 - API Name: Contact_Number__c
 - Description: Help Text
 - Data Owner: Field Usage
 - Compliance Categorization: [Text Box: Volunteer Custom Field: Contact Number - Salesforce - Developer Edition]
 - Created By: tejaswini.kataru, 7/11/2025, 3:24 AM
 - Object Name: Volunteer
 - Data Type: Number
 - Modified By: tejaswini.kataru, 7/11/2025, 3:24 AM
- General Options**:
 - Required:
 - Unique:
 - External ID:
 - AI Prediction:
 - Default Value: [Blank]

To create another fields in an object:

1. Setup → Object Manager → Volunteer
2. Fields & Relationships → New → Text Area (Long) → Next
3. Label: Address (API Name auto-fills)
4. Next → Next → Save & New.

The screenshot shows the Salesforce Setup interface for creating a custom field. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Volunteer'. On the left, a sidebar lists various setup categories like 'Details', 'Fields & Relationships' (which is selected), and 'Page Layouts'. The main content area is titled 'Volunteer Custom Field' and 'Address'. It shows the 'Custom Field Definition Detail' for 'Address'. Key details include:

- Field Information:** Field Label: Address, Field Name: Address, API Name: Address__c, Description: , Help Text: , Data Owner: , Field Usage: , Data Sensitivity Level: , Compliance Categorization: .
- General Options:** Default Value: .
- Long Text Area Options:** # Visible Lines: 3, Length: 32,768.
- Validation Rules:** A 'New' button is present.

Buttons at the top right include 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. A 'Help for this Page' link is also visible.

To create another fields in an object:

1. Setup → Object Manager → Volunteer
2. Fields & Relationships → New → Date → Next
3. Label: Date of Birth (API Name auto-fills)
4. Next → Next → Save & New.

Creation of fields for the Execution Details object:

1. Setup → Object Manager → Volunteer
2. Fields & Relationships → New → Auto Number → Next
3. Label: Execution ID (Name auto-fills)
4. ✓ Required → Next → Next → Save & New.

Create Flow to create a record in Venue object

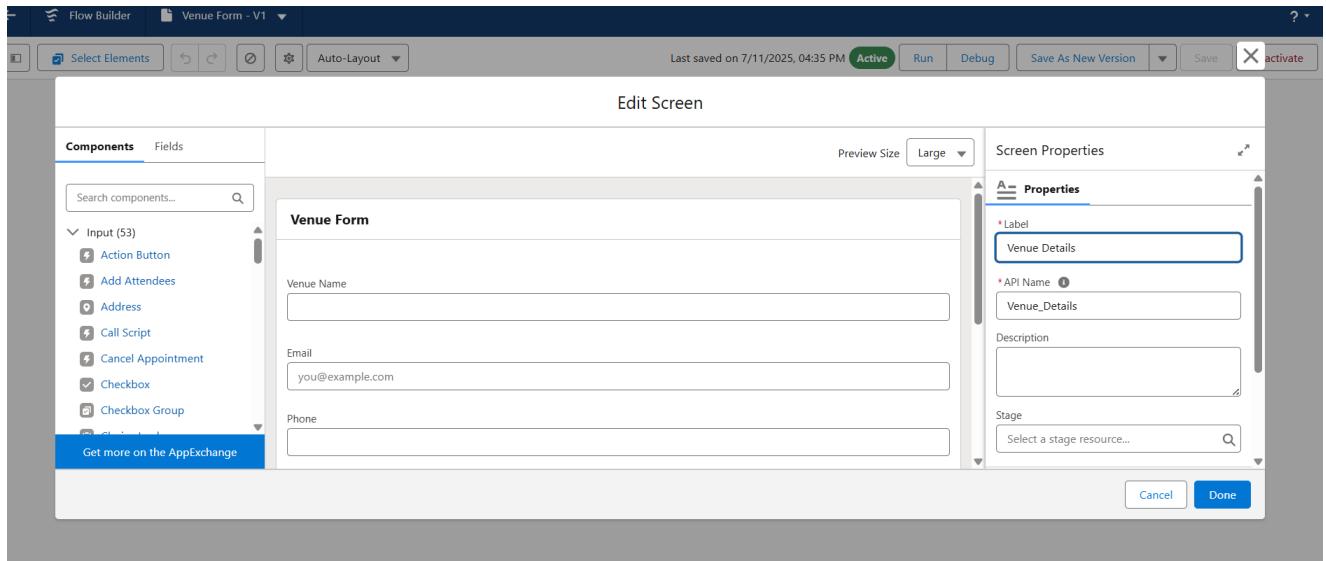
1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.
2. Select the Screen flow. Click on create.

3. Click on the '+' icon in between start and end and click on 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:

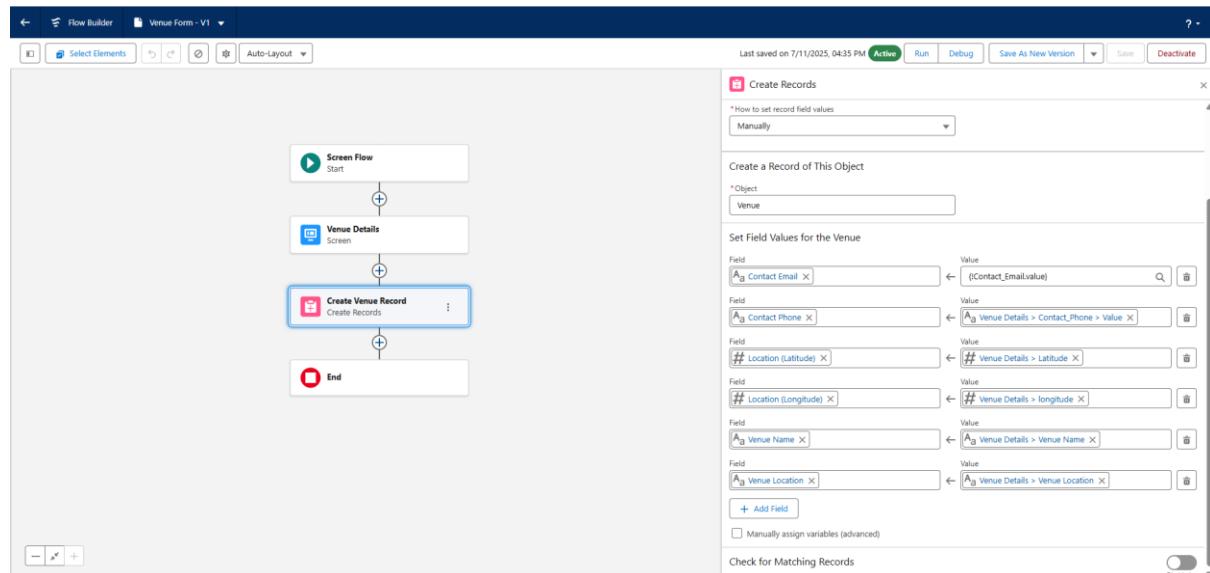
Value = Contact_Phone_c : {! Contact_Phone.value}

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

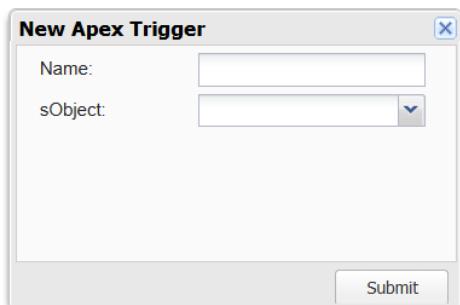
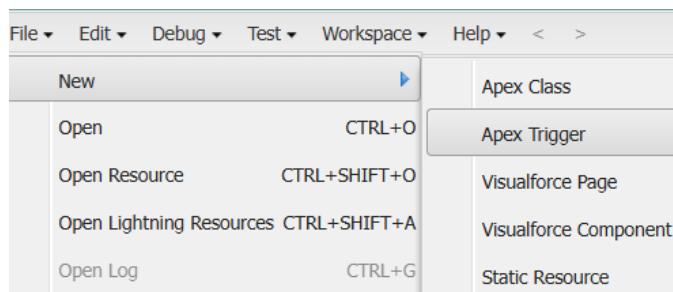
Flow API Name: Venue_Form

Apex Classes, Triggers, Asynchronous Apex:

Custom Apex triggers were developed to automatically update stock status and generate distribution records when a pickup is marked completed. Additionally, asynchronous Apex (Batch Apex) was implemented to periodically send summary emails to donors and NGOs highlighting food saved and beneficiaries served over the week. This ensures timely communication and promotes continued engagement without impacting real-time system performance.

Create a Trigger

1. Setup → Gear icon → Developer Console
2. File → New → Apex Trigger
3. Trigger Name: DropOffTriggers
4. sObject: Drop-Off Point
5. Click Submit



Trigger Code

(This Trigger is to assign 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 3: UI/UX Development & Customization:

Create a Lightning App

To create a lightning app page:

1. Setup → Quick Find: App Manager → Click “App Manager”
2. Click “New Lightning App”.

The screenshot shows the 'App Details & Branding' section of the Lightning App Builder. It includes fields for 'App Name' (FoodConnect), 'Developer Name' (FoodConnect), 'Image' (with an 'Upload' button), 'Primary Color Hex Value' (#0070D2), and a preview of the app launcher.

3. App Details & Branding.

- **App Name:** FoodConnect.
- **Developer Name:** auto-populates.
- **Image:** optional.
- **Primary Color :** keep as default.

4. Navigation Style.

- Click **Next**.
- On the App Options page, choose **Navigation Style: Standard Navigation**.
- Click **Next**.

The screenshot shows the 'App Options' section of the Lightning App Builder. It includes settings for 'Navigation and Form Factor' (Navigation Style: Standard navigation), 'Setup and Personalization' (Setup Experience: Setup (full set of Setup options)), and 'App Personalization Settings' (checkboxes for disabling end user personalization, temporary tabs, and using the Omni-Channel sidebar).

4. (Utility Items) keep it as default >> Next.

5. To Add Navigation Items:

Search for the item in the (Home, Venue, Drop-Off Point, Task, Volunteer, Execution Details, Reports) from the search bar and move it using the arrow button >> Next >> Next.

6. To Add User Profiles:

Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

Creation of Report on Venue with DropOff with Volunteer 1.

Go to the app (FoodConnect) >> click on the reports tab

2. Click on New Folder.

Folder Label: Custom Reports

Folder Unique Name: CustomReports

3. Open Custom Reports and click on New Report 4. Select Report

Type: Venue with DropOff with Volunteer

5. Then click on Start Report.

6. In GROUP ROWS: Add Volunteer Name

7. In Columns: Add Venue Name, Drop-Off point Name, Distance.

Name	Venue Name	Drop-Off Point Name	Distance
- (2)	La Royale Banquet Hall	Sharur	0.0000
	Upasra Grand	-	-
			0.0000
Bhavika (1)	Paradise Garden Function Hall	Suraram Village	3.7514300
			3.7514300
Charan (1)	La Royale Banquet Hall	Jeedimetta	5.8974800
			5.8974800
Total (4)			9.6469100

8. Now click on Save & Run.

9. Give Label as:

10. Report Name: venue and Drop Off point

11. Report Unique Name: Auto Populated

12. Click on Select Folder and select Custom Report, then click on Save.

Creation of Report on Volunteers with Execution Details and Tasks

1. Go to the app (FoodConnect) >> click on the reports tab

2. Click on Custom Reports Folder and click on New Report 3. Select Report

Type: Volunteers with Execution Details and Tasks.

4. Then click on Start Report.

5. In GROUP ROWS: Volunteer ID

6. In Columns: Add Volunteer: Volunteer Name, Task: Task Name, Execution Detail : Execution Detail Name, Volunteer: Owner Name, Task: Date, Task : Rating.

The screenshot shows the FoodConnect report builder. The report is titled "Volunteer Task" and has a sub-report titled "Tasks with Execution Details and Volunteers". The report structure is as follows:

- Groups:** Volunteer: Volunteer ID
- Columns:** Volunteer: Name, Task: Task Name, Execution Detail: Execution Detail Name, Volunteer: Volunteer Owner, Date, Rating
- Data Preview:**

Volunteer: Volunteer ID	Volunteer: Name	Task: Task Name	Execution Detail: Execution Detail Name	Volunteer: Volunteer Owner	Date	Rating
3 (1)	Charan	Task2	Execution 2	Iksha Foundation Iksha_Foundation	7/18/2025	5
4 (1)	Bhavika	Task 1	Execution 1	Iksha Foundation Iksha_Foundation	7/18/2025	4
Total (2)						

7. Now click on Save & Run.

8. Give Label as:

Report Name: Volunteer Task

Report Unique Name: Auto Populated

1. Click on Select Folder and select Custom Report, then click on Save.

Adding venue and Drop Off point Report to the Dashboard 1.

Go to the app (Food Connect) >> click on the Dashboards tab.

2. Click on New Folder.

Folder Label: Custom Dashboards

Folder Unique Name: Auto Populated

3. Open Custom Dashboards and click on New Dashboards

4. Name: Organization Details

5. Click on Widget and select Chart or Table

6. In Select Report: Select venue and Drop Off point Report.

7. Then click on select

8. In Add Component:

Display As: Select Lightning Table

Component Theme: Select Dark (Optional)

The screenshot shows the FoodConnect dashboard with a modal window titled 'Add Widget'. The modal displays a preview of a report titled 'venue and Drop Off point' with a table of data. Below the preview, there's a 'Widget Theme' section with two options: 'Light (Dashboard default)' and 'Dark'. The 'Dark' option is selected and highlighted with a blue border. At the bottom right of the modal are 'Cancel' and 'Add' buttons.

1. Now click on save.

Adding Volunteer Task Report to the Dashboard

1. Click on Widget and select Chart or Table
2. In Select Report: Select Volunteer Task Report.
3. Then click on select
4. In Add Component:

Display As: Select Line Chart

Component Theme: Select Dark (Optional)

The screenshot shows the FoodConnect dashboard with a modal window titled 'Add Widget'. The modal displays a preview of a report titled 'Volunteer Task' with a line chart. The Y-axis is labeled 'Record Count' and the X-axis is labeled 'Volunteer: Volunteer ID'. The chart shows a single data point at (3, 1). Below the preview, there's a 'Widget Theme' section with two options: 'Light (Dashboard default)' and 'Dark'. The 'Dark' option is selected and highlighted with a blue border. At the bottom right of the modal are 'Cancel' and 'Add' buttons.

1. Now click on save.

The screenshot shows the FoodConnect Salesforce application interface. At the top, there's a navigation bar with links like Home, Drop-Off Points, Volunteers, Execution Details, Reports, Venues, Tasks, Organization Details, and a search bar. Below the navigation is a section titled 'Organization Details' with a 'Save' button. To the left, there's a table titled 'venue and Drop Off point' listing venues and their drop-off points with distances. To the right, there's a chart titled 'Volunteer Task' showing a distribution of tasks across four categories. A decorative image of various dishes is on the right side of the dashboard.

Phase 4: Data Migration, Testing & Security Data

Loading Process:

Historical data of partner restaurants, NGOs, and past donation records was migrated into Salesforce using the Data Loader, chosen for its capability to handle bulk records and ensure referential integrity across custom objects like Food Donation, Pickup Schedule, and Distribution Record. This ensured a smooth transition from manual tracking systems to the new automated CRM.

Field History Tracking, Duplicate Rules, Matching Rules:

Field History Tracking was enabled on key objects such as Food Donation and Pickup Schedule to maintain an audit trail of critical changes like pickup time adjustments or status updates. Duplicate Rules and Matching Rules were configured on the Donor and Recipient records to prevent redundant entries and ensure that every partner is uniquely identified, thereby preserving data quality.

Profiles, Roles, Role Hierarchy, Permission Sets, Sharing Rules:

A robust security model was implemented using Salesforce Profiles and Roles. Profiles controlled baseline access for different users like restaurant managers, NGO coordinators, and volunteer drivers. A Role Hierarchy was established to allow NGO managers to view records of volunteers under them while keeping data compartmentalized across different NGOs. Permission Sets were used to grant additional privileges, such as access to dashboards for analytics teams, while Sharing Rules ensured specific records (like a Pickup Schedule) could be shared with relevant volunteers automatically.

Profiles

1. Setup → Quick Find “Profiles” → Profiles
2. Find “Standard Platform User” → Clone
3. Enter Profile Name: NGOs Profile
4. Click Save

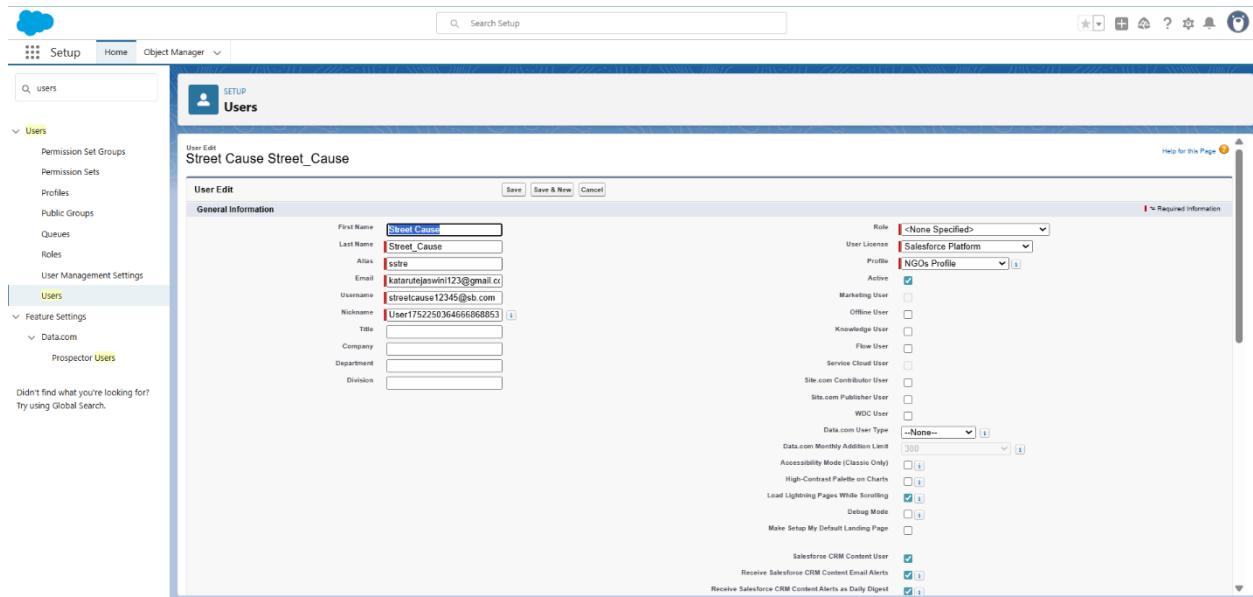
The screenshot shows the Salesforce Setup interface under the 'Users' tab. A new user record is being created for 'Iksha Foundation Iksha_Foundation'. The 'General Information' section includes fields for First Name (Iksha Foundation), Last Name (Iksha_Foundation), Alias (Iksh), Email (ikshutejaswini123@gmail.com), Username (Ikshafoundation123789@sb), Nickname (User1752249848505691605), Title (Blank), Company (Blank), Department (Blank), and Division (Blank). The 'Profile' field is set to 'NGOs Profile'. The 'Role' field is set to '<None Specified>'. The 'User License' is 'Salesforce Platform'. The 'Active' checkbox is checked. The 'Marketing User' checkbox is unchecked. The 'Data.com User Type' dropdown is set to '-None-'.

Creation of User2, User3

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

The screenshot shows the Salesforce Setup interface under the 'Users' tab. A new user record is being created for 'NSS NSS'. The 'General Information' section includes fields for First Name (NSS), Last Name (NSS), Alias (nss), Email (kshanujaswini123@gmail.com), Username (nss123789@sb.com), Nickname (User1752250153190156832), Title (Blank), Company (Blank), Department (Blank), and Division (Blank). The 'Profile' field is set to 'NGOs Profile'. The 'Role' field is set to '<None Specified>'. The 'User License' is 'Salesforce Platform'. The 'Active' checkbox is checked. The 'Marketing User' checkbox is unchecked. The 'Data.com User Type' dropdown is set to '-None-'.

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



Creation of sharing rules

1. Go to setup >> type Sharing Settings in quick find box >> Click on the Sharing Settings.
2. Scroll down and find Drop-Off point Sharing Rules.
3. Click on new near Drop-Off point Sharing Rules and Name it as:
Label: Rule 1
Rule Name: Rule_1
4. Select your rule type: Select Based on criteria.
5. Select which records to be shared:
Field: Operator: Value = Distance: less than: 15
6. Select the users to share with: Near Share With
Public Groups: Iksha
7. Click on Save.
8. Click on new near Drop-Off point Sharing Rules and Name it as:
Label: Rule 2
Rule Name: Rule_2
9. Select your rule type: Select Based on criteria.
10. Select which records to be shared:
Field: Operator: Value = Distance: greater than: 15

- Field: Operator: Value = Distance: less or equal: 30
11. Select the users to share with: Near Share With
Public Groups: NSS
 12. Click on Save.
 13. Click on new near Drop-Off point Sharing Rules and Name it as:
Label: Rule 3
Rule Name: Rule_3
 14. Select your rule type: Select Based on criteria.
 15. Select which records to be shared:
Field: Operator: Value = Distance: greater than: 30
Field: Operator: Value = Distance: less or equal: 50
 16. Select the users to share with: Near Share With
Public Groups: Street Cause
 17. Click on Save.

Phase 5: Deployment, Documentation & Maintenance

Deployment Strategy:

The deployment of the FOODCONNECT CRM from the sandbox environment to production was carried out using **Change Sets**, which facilitated secure and organized migration of metadata components including custom objects, fields, validation rules, flows, and Apex code. This method ensured that all dependencies were properly packaged and tested before final deployment, minimizing the risk of disruptions in the live environment.

System Maintenance and Monitoring:

The CRM is designed for ease of ongoing maintenance. Scheduled reports and dashboards help monitor daily operations, highlighting metrics like pending pickups and distributions completed. Regular data quality reviews are performed to identify duplicates or

Venue
La Royale Banquet Hall

Related Details

Venue Name La Royale Banquet Hall Owner tejaswini kataru

Contact Email katuntejaswini123@gmail.com

Contact Phone (087) 654-3210

Location 14. 15

Venue Location rajampet

Created By tejaswini kataru - 7/18/2025, 2:38 AM

Last Modified By tejaswini kataru - 7/18/2025, 2:38 AM

Activity

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

inconsistencies. Admins are responsible for periodic reviews of automation processes and ensuring that validation rules and flows continue to align with evolving business

Drop-Off Point
Shapur

Related Details

Drop-Off Point Name Shapur Owner tejaswini kataru

Venue_c La Royale Banquet Hall

Location 2 14. 15

distance calculation 0.00

State Andhra Pradesh

Distance 0.0000

Created By tejaswini kataru - 7/18/2025, 2:39 AM

Last Modified By tejaswini kataru - 7/18/2025, 2:39 AM

Activity

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

requirements. Any required enhancements or new features will be safely developed and tested in sandbox environments before being pushed to production.

FoodConnect Home Drop-Off Points Volunteers Execution Details Reports Venues Tasks *Organization Details *Organization Details

Volunteer Bhavika

New Contact Edit New Opportunity

Related Details

Name: Bhavika
Drop-Off Point: Suraram Village
Volunteer ID: 4
Gender: Female Available On: 7/18/2025
Age: 20 Email: kataruntejswini123@gmail.com
Contact Number: 8765432980 Address: kadapa Date of Birth: 7/18/2025 Execution ID: 4
Volunteer Owner: Isha Foundation Isha Foundation
Created By: tejaswini.kataru - 7/18/2025, 3:42 AM

Last Modified By: tejaswini.kataru - 7/18/2025, 3:42 AM

Activity

Filters: All time • All activities • All types Refresh • Expand All • View All

No activities to show. Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

FoodConnect Home Drop-Off Points Volunteers Execution Details Reports Venues Tasks *Organization Details *Organization Details

Execution Detail Execution 1

New Contact Edit New Opportunity

Related Details

Execution Detail Name: Execution 1
Volunteer: Bhavika Task: Task 1
Created By: tejaswini.kataru - 7/18/2025, 3:53 AM

Last Modified By: tejaswini.kataru - 7/18/2025, 3:53 AM

Activity

Filters: All time • All activities • All types Refresh • Expand All • View All

No activities to show. Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

+

Report: Tasks with Execution Details and Volunteers						
Volunteer Task						
Total Records 2						
<input type="checkbox"/> Volunteer: Volunteer ID + <input type="checkbox"/> Volunteer: Name + <input type="checkbox"/> Task: Task Name + <input type="checkbox"/> Execution Detail: Execution Detail Name + <input type="checkbox"/> Volunteer: Volunteer Owner + <input type="checkbox"/> Date + <input type="checkbox"/> Rating						
<input type="checkbox"/> 3 (1)	Charan	Task2	Execution 2	Iksha Foundation Iksha_Foundation	7/18/2025	5
Subtotal						
<input type="checkbox"/> 4 (1)	Bhavika	Task 1	Execution 1	Iksha Foundation Iksha_Foundation	7/18/2025	4
Subtotal						
Total (2)						

Report: Venue with DropOff with Volunteer venue and Drop Off point						
Total Records 4						
Total Distance 9,648.9100						
<input type="checkbox"/> Name + <input type="checkbox"/> Venue Name + <input type="checkbox"/> Drop-Off Point Name + <input type="checkbox"/> Distance						
<input type="checkbox"/> - (2)	La Royale Banquet Hall	Shapur	0.0000			
	Ujwala Grand	-	-			
Subtotal			0.0000			
<input type="checkbox"/> Bhavika (1)	Paradise Garden Function Hall	Suraram Village	3.7514300			
Subtotal			3.7514300			
<input type="checkbox"/> Charan (1)	La Royale Banquet Hall	Jeedimella	5.8974800			
Subtotal			5.8974800			
Total (4)			9,648.9100			

FoodConnect Home Drop-Off Points Volunteers Execution Details Reports Venues Tasks Tasks Organization Details Organization Details

Dashboard Task Execution Details Last refreshed 2 days ago. Refresh this dashboard to see the latest data. As of Jul 20, 2025, 8:40 AM Viewing as tejaswini.kataru

Venue Name	Drop-Off Point Name	Distance
La Royale Banquet Hall	Shapur	0.0000
La Royale Banquet Hall	Jeedimella	5.8975k
Paradise Garden Function Hall	Suraram Village	3.7514k
Ujwala Grand	-	-

View Report (venue and Drop Off) As of Jul 20, 2025, 8:40 AM

Volunteer Task

View Report (Volunteer Task) As of Jul 20, 2025, 8:40 AM

Venue Form

Venue Name:

Email: you@example.com

Phone:

Venue Location:

Latitude:

Longitude:

Next

Troubleshooting Approach:

A systematic troubleshooting guide is maintained to resolve common issues such as failed pickups, notification errors, or data mismatches. Debug logs are reviewed to trace problems in Apex triggers or automation flows. Additionally, the CRM documentation includes details of object relationships, business logic, and error messages to assist technical teams in quickly diagnosing and fixing problems. This structured approach ensures system stability and minimizes downtime, supporting the mission of timely delivery of leftover food to the needy.

Conclusion:

FOODCONNECT showcases how Salesforce CRM can be harnessed to create a powerful, scalable solution for surplus food redistribution. By automating the processes of collection, scheduling, and distribution, the platform significantly reduces manual effort and food waste, while ensuring timely delivery to underserved communities. The system's use of dashboards and automated communications enhances transparency and fosters stronger relationships with donors. This data-driven approach increases accountability and engagement—an essential factor in successful nonprofit initiatives. Furthermore, **FOODCONNECT** is built on a flexible architecture, enabling it to easily onboard additional donors, NGOs, and volunteers. This ensures the platform can grow in tandem with its mission. Looking toward the future, introducing AI-based demand forecasting can optimize resource allocation, while chatbot-driven donor support can streamline user engagement and elevate donor experience. These enhancements will not only deepen the platform's impact but also reinforce its core mission to combat hunger sustainably.