



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 Setup interface with the URL <https://orgfarm-c0e6610978-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001El8f/Details/view>. The page title is "SETUP > OBJECT MANAGER" and the object name is "Venue". The left sidebar lists various configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled "Details" and shows the following fields:

- Description: [empty]
- API Name: Venue__c
- Custom: ✓
- Singular Label: Venue
- Plural Label: Venues

On the right side, under "Enable Reports", the following checkboxes are checked:

- ✓
- ✓
- ✓
- ✓

Below these checkboxes, deployment status is listed as "Deployed" and help settings are mentioned as "Standard salesforce.com Help Window". At the bottom right of the main content area are "Edit" and "Delete" buttons.

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 Setup interface for the 'Object Manager'. The page title is 'SETUP > OBJECT MANAGER Drop-Off Point'. On the left, a sidebar lists various object settings like Fields & Relationships, Page Layouts, and Record Types. The main 'Details' tab is selected. The configuration pane shows the following fields:

- Description:** API Name: Drop_Off_Point__c, Custom: ✓, Singular Label: Drop-Off Point, Plural Label: Drop-Off Points.
- Enable Reports:** ✓
- Track Activities:** ✓
- Track Field History:** ✓
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

At the top right, there are 'Edit' and 'Delete' buttons.

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**.

SETUP > OBJECT MANAGER

Task

Details

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

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

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.**

SETUP > OBJECT MANAGER

Volunteer

Details

Description	API Name Volunteer_c
Custom	Singular Label Volunteer
	Plural Label Volunteers
Enable Reports	
✓ Track Activities	
✓ Track Field History	
✓ Deployment Status	
Deployed	
Help Settings	
Standard salesforce.com Help Window	

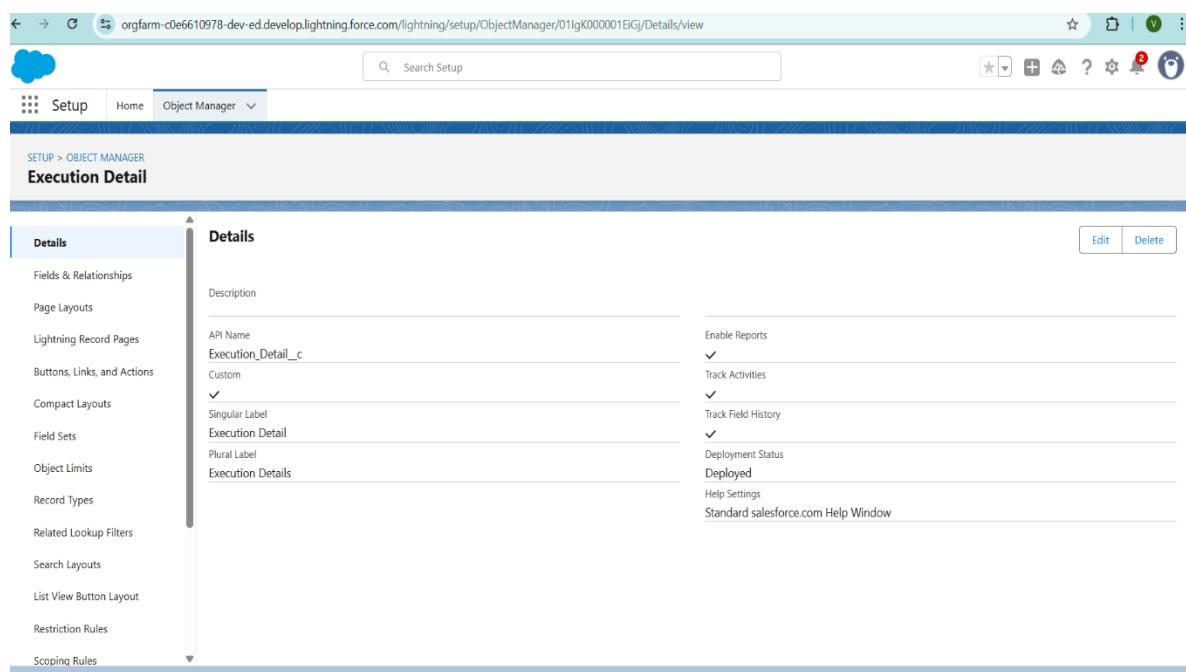
Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

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**.



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 Setup interface for creating a custom field. The object is 'Volunteer' and the field name is 'Drop-Off Point'. The 'Field Information' section shows the field label 'Drop-Off Point', field name 'Drop_Off_Point', API name 'Drop_Off_Point_c', and data type 'Master-Detail'. The 'Master-Detail Options' section shows it is related to 'Drop-Off Point' and has a child relationship name 'Volunteers'. The 'Sharing Setting' is set to 'ReadWrite: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.'

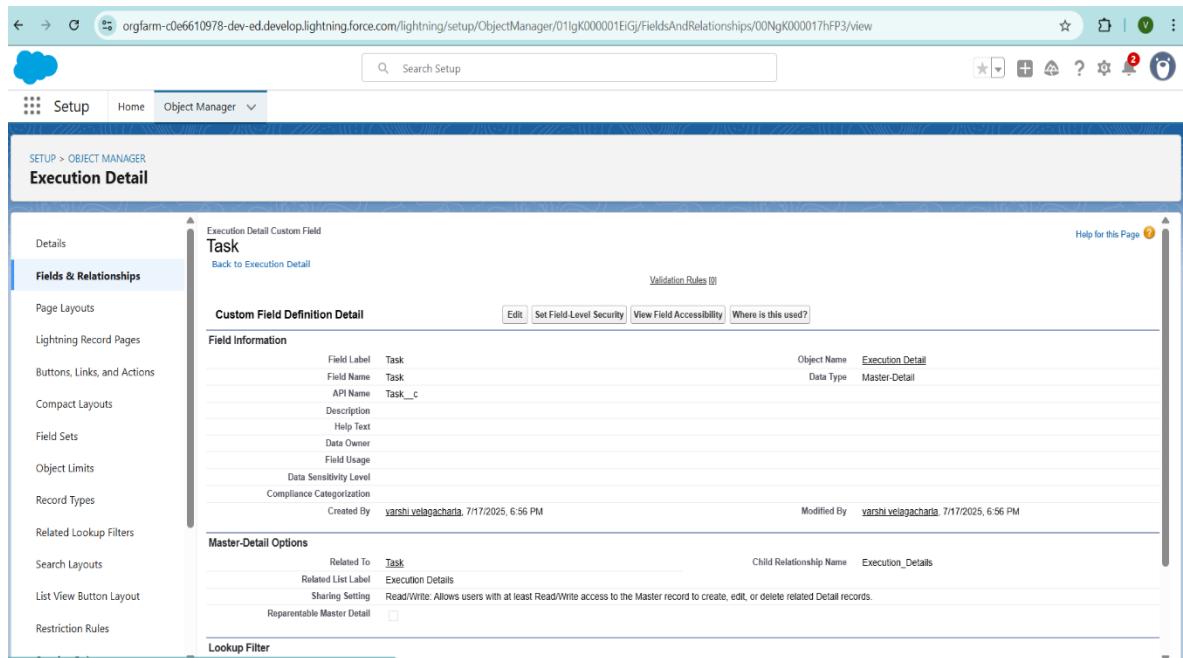
Creation of Master Detail Relationship Field on Execution Details Object:

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. **Save**.

The screenshot shows the Salesforce Setup interface for creating a custom field. The object is 'Execution Detail' and the field name is 'Volunteer'. The 'Field Information' section shows the field label 'Volunteer', field name 'Volunteer', API name 'Volunteer_c', and data type 'Master-Detail'. The 'Master-Detail Options' section shows it is related to 'Volunteer' and has a child relationship name 'Execution_Details'. The 'Sharing Setting' is set to 'ReadWrite: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.'

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**.

The screenshot shows the Salesforce Object Manager interface. A custom field named 'Venue__c' is being created for the 'Drop-Off Point' object. The 'Field Information' section shows the field label as 'Venue__c', field name as 'Venue', and API name as 'Venue__c'. The object name is 'Drop-Off Point' and the data type is 'Lookup'. The 'Related To' field is set to 'Venue'. The 'Child Relationship Name' is 'Drop_Off_Points'.

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. A custom field named 'Sponsored_By' is being created for the 'Task' object. The 'Field Information' section shows the field label as 'Sponsored_By', field name as 'Sponsored_By', and API name as 'Sponsored_By__c'. The object name is 'Task' and the data type is 'Lookup'. The 'Related To' field is set to 'Venue'. The 'Child Relationship Name' is 'Tasks (Sponsored_By)'.

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 for creating a custom field. The URL is <https://orgfarm-c0e6610978-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001EIDV/FieldsAndRelationships/00NgK000017gxVO/view>. The page title is "Task Custom Field Drop-Off Point". The left sidebar shows the "Fields & Relationships" tab is selected. The main content area displays the "Custom Field Definition Detail" for the "Drop-Off Point" field. The "Field Information" section shows the field label is "Drop-Off Point", the field name is "Drop_Off_Point", the API name is "Drop_Off_Point_c", and the object name is "Task". The "Data Type" is "Lookup". The "Lookup Options" section shows the "Related To" is "Drop-Off Point" and the "Child Relationship Name" is "Tasks". The "Required" checkbox is checked.

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 for the 'Venue' object. A custom field named 'Contact_Email' has been created. The 'Field Information' section shows the following details:

- Field Label:** Contact_Email
- Field Name:** Contact_Email
- API Name:** Contact_Email_c
- Description:** Help Text
- Data Owner:** Data Owner
- Field Usage:** Data Sensitivity Level
- Compliance Categorization:** Compliance Categorization
- Object Name:** Venue
- Data Type:** Email
- Created By:** varshi.velagachara, 7/17/2025, 7:05 PM
- Modified By:** varshi.velagachara, 7/18/2025, 1:14 AM

The 'General Options' section includes:

- Required:** checked
- Unique:** unchecked
- External ID:** unchecked
- Default Value:** (empty)

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**

The screenshot shows the Salesforce Setup interface for the 'Venue' object. A custom field named 'Contact Phone' has been created. The 'Field Information' section shows the following details:

- Field Label:** Contact Phone
- Field Name:** Contact_Phone
- API Name:** Contact_Phone_c
- Description:** Help Text
- Data Owner:** Data Owner
- Field Usage:** Data Sensitivity Level
- Compliance Categorization:** Compliance Categorization
- Object Name:** Venue
- Data Type:** Phone
- Created By:** varshi.velagachara, 7/17/2025, 7:06 PM
- Modified By:** varshi.velagachara, 7/17/2025, 7:06 PM

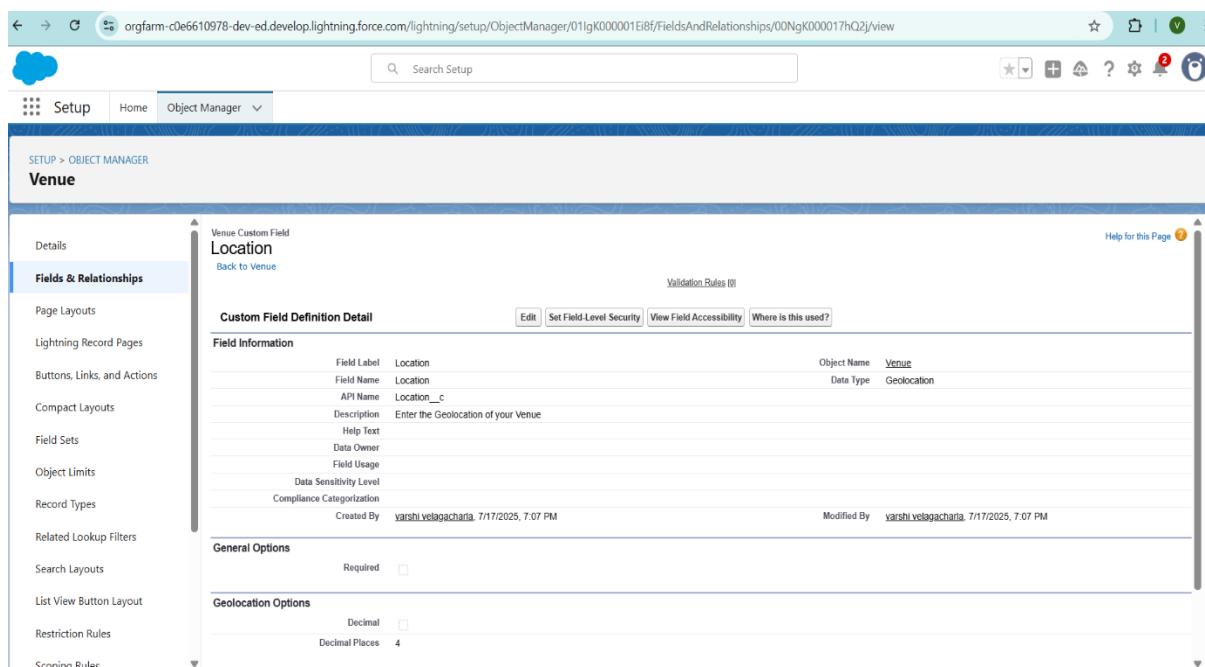
The 'General Options' section includes:

- Required:** checked
- Default Value:** (empty)

The 'Validation Rules' section indicates: "No validation rules defined".

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.**



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 for the 'Venue' object. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area displays the 'Venue Custom Field' named 'Venue Location'. The 'Field Information' section shows the field label 'Venue Location', field name 'Venue_Location', API name 'Venue_Location__c', and data type 'Long Text Area'. The 'General Options' section includes a 'Default Value' and 'Length' set to 32,768. The 'Validation Rules' section is currently empty.

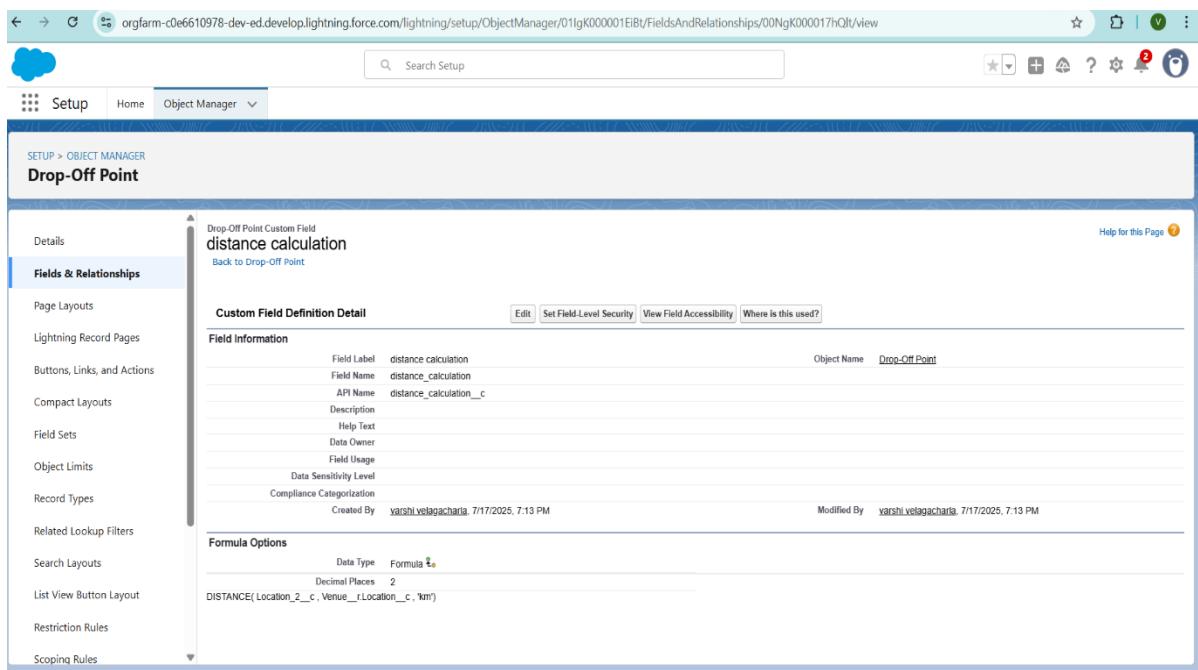
Creation of fields for the Drop-Off point object:

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 Setup interface for the 'Drop-Off Point' object. The sidebar lists various setup categories. The main area displays the 'Drop-Off Point Custom Field' named 'Location 2'. The 'Field Information' section shows the field label 'Location 2', field name 'Location_2', API name 'Location_2__c', and data type 'Geolocation'. The 'General Options' section includes a 'Required' checkbox checked. The 'Geolocation Options' section shows 'Decimal' checked and 'Decimal Places' set to 4.

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**.



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.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "SETUP > OBJECT MANAGER Drop-Off Point". On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Fields & Relationships. The "Fields & Relationships" section is currently selected. The main content area displays the "Custom Field Definition Detail" for a field named "State". The "Field Information" section shows the field label as "State", field name as "State", API name as "State__c", and data type as "Picklist". The "General Options" section indicates that the field is required. The "Picklist Options" section shows a dropdown menu with the value "Restrict picklist to the values defined in the value set". The right side of the screen shows standard Salesforce navigation icons.

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.

The screenshot shows the Salesforce Object Manager interface, similar to the previous one but for a different custom field. The main title is "SETUP > OBJECT MANAGER Drop-Off Point". The "Fields & Relationships" section is selected in the sidebar. The main content area shows the "Custom Field Definition Detail" for a field named "Distance". The "Field Information" section shows the field label as "Distance", field name as "Distance", API name as "Distance__c", and data type as "Number". The "General Options" section indicates that the field is required. The right side of the screen shows standard Salesforce navigation icons.

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 for creating a custom field. The URL in the address bar is <https://orgfarm-c0e6610978-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001EDV/FieldsAndRelationships/00NgK000017hWPt/view>. The page title is "Task Custom Field Task ID". The left sidebar shows navigation options like Details, Fields & Relationships (which is 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, and Scoping Rules. The main content area displays the "Custom Field Definition Detail" for "Task ID". It includes sections for 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), General Options (External ID), and Auto Number Options (Display Format: TASK-{0}). The right side shows the Object Name as "Task" and Data Type as "Auto Number". The bottom of the page shows the "Created By" and "Modified By" fields, both populated with "varshivelagachara" and the timestamp "7/17/2025, 7:22 PM". A "Help for this Page" link is also present.

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 Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "SETUP > OBJECT MANAGER Task". On the left, a sidebar titled "Fields & Relationships" lists various customization options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The central panel displays the "Custom Field Definition Detail" for a "Task Custom Field Date". The "Field Information" section shows the field label as "Date", field name as "Date__c", and data type as "Date". It also lists other properties such as Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The "General Options" section indicates that the field is required. The "Validation Rules" section notes that no validation rules are defined. A "Help for this Page" link is located in the top right corner.

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.

The screenshot shows the Salesforce Object Manager interface. A custom field named 'Food Category' is being created for the 'Task' object. The field is defined as a multi-select picklist. The 'Field Label' is 'Food Category', 'Field Name' is 'Food_Category', and 'API Name' is 'Food_Category__c'. The 'Data Type' is 'Picklist (Multi-Select)'. The 'Required' checkbox is checked. The 'Default Value' is set to 'None'. The 'Object Name' is 'Task'.

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 Object Manager interface. A custom field named 'Number of People Served' is being created for the 'Task' object. The field is defined as a number type. The 'Field Label' is 'Number of People Served', 'Field Name' is 'Number_of_People_Served', and 'API Name' is 'Number_of_People_Served__c'. The 'Data Type' is 'Number'. The 'Required' checkbox is checked. The 'Unique' checkbox is unchecked. The 'External ID' checkbox is unchecked. The 'AI Prediction' checkbox is unchecked. The 'Object Name' is 'Task'.

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.

The screenshot shows the Salesforce Setup interface for creating a custom field. The URL in the browser is <https://orgfarm-c0e6610978-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001EDV/FieldsAndRelationships/00NgK000017hXvR/view>. The page title is "Task Custom Field Name of the Person". The left sidebar shows the "Fields & Relationships" section selected. The main content area displays the "Custom Field Definition Detail" for the field "Name of the Person". The "Field Information" section includes details like Field Label: "Name of the Person", Field Name: "Name_of_the_Person", API Name: "Name_of_the_Person_c", and Data Type: "Text". The "General Options" section includes checkboxes for Required, Unique, Case Sensitive, External ID, and Default Value. The "Validation Rules" section is collapsed. The "Help for this Page" button is visible in the top right corner.

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 .

Task Custom Field
Phone

Custom Field Definition Detail

Field Information	Object Name	Data Type
Field Label: Phone	Task	Phone
Field Name: Phone		
API Name: Phone__c		
Description:		
Help Text:		
Data Owner:		
Field Usage:		
Data Sensitivity Level:		
Compliance Categorization:		
Created By: varshi.velagacharla, 7/17/2025, 7:29 PM	Modified By:	varshi.velagacharla, 7/17/2025, 7:29 PM

General Options

Required
<input type="checkbox"/>
Default Value:

Validation Rules

No validation rules defined.

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.

Task Custom Field
Rating

Custom Field Definition Detail

Field Information	Object Name	Data Type
Field Label: Rating	Task	Picklist
Field Name: Rating		
API Name: Rating__c		
Description:		
Help Text:		
Data Owner:		
Field Usage:		
Data Sensitivity Level:		
Compliance Categorization:		
Created By: varshi.velagacharla, 7/17/2025, 7:30 PM	Modified By:	varshi.velagacharla, 7/17/2025, 7:30 PM

General Options

Required
<input type="checkbox"/>
Default Value:

Picklist Options

Restrict picklist to the values defined in the value set

Controlling Field: Instead

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 for creating a custom field. The URL in the address bar is <https://orgfarm-c0e6610978-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001EIDV/FieldsAndRelationships/00NgK000017haen/view>. The page title is "SETUP > OBJECT MANAGER Task". On the left, there's a sidebar with various setup categories like Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, etc. The main content area shows a "Custom Field Definition Detail" for a field named "Feedback" on the "Task" object. The field information includes:

- Field Label: Feedback
- Field Name: Feedback
- API Name: Feedback_c
- Description: (empty)
- Help Text: (empty)
- Data Owner: (empty)
- Field Usage: (empty)
- Data Sensitivity Level: (empty)
- Compliance Categorization: (empty)
- Created By: varshi.velagacharla, 7/17/2025, 7:31 PM
- Modified By: varshi.velagacharla, 7/17/2025, 7:31 PM
- Object Name: Task
- Data Type: Long Text Area
- Length: 32,768

Below this, there are sections for "General Options" (Default Value) and "Long Text Area Options" (# Visible Lines: 3). At the bottom, there's a "Validation Rules" section with a "New" button.

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 for the 'Object Manager'. The 'Volunteer' object is selected. On the left, the 'Fields & Relationships' tab is active. In the center, a 'Custom Field Definition Detail' page is displayed for the 'Volunteer ID' field. The field information includes:

- Field Label:** Volunteer ID
- Field Name:** Volunteer_ID
- API Name:** Volunteer_ID_c
- Description:** Help Text
- Data Owner:** Data Usage
- Data Sensitivity Level:** Standard
- Compliance Categorization:** Not applicable
- Created By:** varshi.velagacharia, 7/18/2025, 12:21 AM
- Modified By:** varshi.velagacharia, 7/18/2025, 12:21 AM

Below the main details, there are sections for 'General Options' (External ID) and 'Auto Number Options' (Display Format).

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**.

The screenshot shows the Salesforce Object Manager interface. The URL in the address bar is <https://orgfarm-c0e6610978-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001EiF7/FieldsAndRelationships/00NgK000017jAMr/view>. The page title is "Volunteer". The left sidebar is titled "Fields & Relationships" and lists various setup options like Details, Page Layouts, Lightning Record Pages, etc. The main content area shows a "Custom Field Definition Detail" for a field named "Gender". The "Field Information" section includes fields for Field Label (Gender), Field Name (Gender), API Name (Gender__c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By (varshi.velagachari), and Modified By (varshi.velagachari). The "General Options" section has "Required" checked and "Default Value" set to null. The "Picklist Options" section has "Restrict picklist to the values defined in the value set" checked. 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 present.

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).

Volunteer Custom Field Available On

Custom Field Definition Detail

Field Information		Validation Rules	
Field Label	Available On	Object Name	Volunteer
Field Name	Available_On	Data Type	Date
API Name	Available_On_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	varshi.velagachara, 7/18/2025, 12:23 AM	Modified By	varshi.velagachara, 7/18/2025, 12:23 AM
General Options		Validation Rules	
Required <input checked="" type="checkbox"/>		New Validation Rules Help ?	
Default Value			
Validation Rules		No validation rules defined.	

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.

Volunteer Custom Field Age

Custom Field Definition Detail

Field Information		Validation Rules	
Field Label	Age	Object Name	Volunteer
Field Name	Age	Data Type	Number
API Name	Age_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	varshi.velagachara, 7/18/2025, 12:24 AM	Modified By	varshi.velagachara, 7/18/2025, 12:24 AM
General Options		Validation Rules	
Required <input checked="" type="checkbox"/>		New Validation Rules Help ?	
Unique <input type="checkbox"/>			
External ID <input type="checkbox"/>			
AI Prediction <input type="checkbox"/>			
Default Value			
Validation Rules		No validation rules defined.	

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 Object Manager interface. The top navigation bar includes links for 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, Page Layouts, and Lightning Record Pages. The "Fields & Relationships" section is currently selected. In the center, a "Custom Field Definition Detail" page is displayed for a field named "Email". The "Field Information" section shows the field label as "Email", field name as "Email", API name as "Email__c", and data type as "Email". The "General Options" section has the "Required" checkbox checked. At the bottom, there's a "Validation Rules" section with a "New" button. The URL in the browser is <https://orgfarm-c0e6610978-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001Ef7/FieldsAndRelationships/00NgK000017jArV/view>.

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 for the 'Volunteer' object. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area displays a 'Custom Field Definition Detail' for a field named 'Contact Number'. The field's API name is 'Contact_Number__c'. It is a 'Number' type field. The 'Field Information' section includes fields for Label, Name, and Description. The 'General Options' section includes checkboxes for Required (checked), Unique, External ID, AI Prediction, and Default Value.

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.

SETUP > OBJECT MANAGER
Volunteer

Fields & Relationships

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules

Custom Field Definition Detail

Field Information

Field Label	Address	Object Name	Volunteer
Field Name	Address	Data Type	Long Text Area
API Name	Address__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By: varshi.velagachari, 7/18/2025, 12:27 AM Modified By: varshi.velagachari, 7/18/2025, 12:27 AM

General Options

Default Value

Long Text Area Options

Visible Lines: 3 Length: 32,768

Validation Rules

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.

SETUP > OBJECT MANAGER
Volunteer

Fields & Relationships

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules

Custom Field Definition Detail

Field Information

Field Label	Date of Birth	Object Name	Volunteer
Field Name	Date_of_Birth	Data Type	Date
API Name	Date_of_Birth__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By: varshi.velagachari, 7/18/2025, 12:27 AM Modified By: varshi.velagachari, 7/18/2025, 12:27 AM

General Options

Required

Validation Rules

No validation rules defined.

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.

The screenshot shows the Salesforce Setup interface for creating a custom field. The URL is orgfarm-c0e6610978-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01gK000001ElF7/FieldsAndRelationships/00NgK000017j6xb/view. The page title is "Volunteer Custom Field Execution ID". The "Fields & Relationships" tab is selected in the sidebar. The main content area displays the "Custom Field Definition Detail" for the "Execution ID" field. The "Field Information" section shows the following details:

Field Label	Execution ID	Object Name	Volunteer
Field Name	Execution_ID	Data Type	Auto Number
API Name	Execution_ID_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

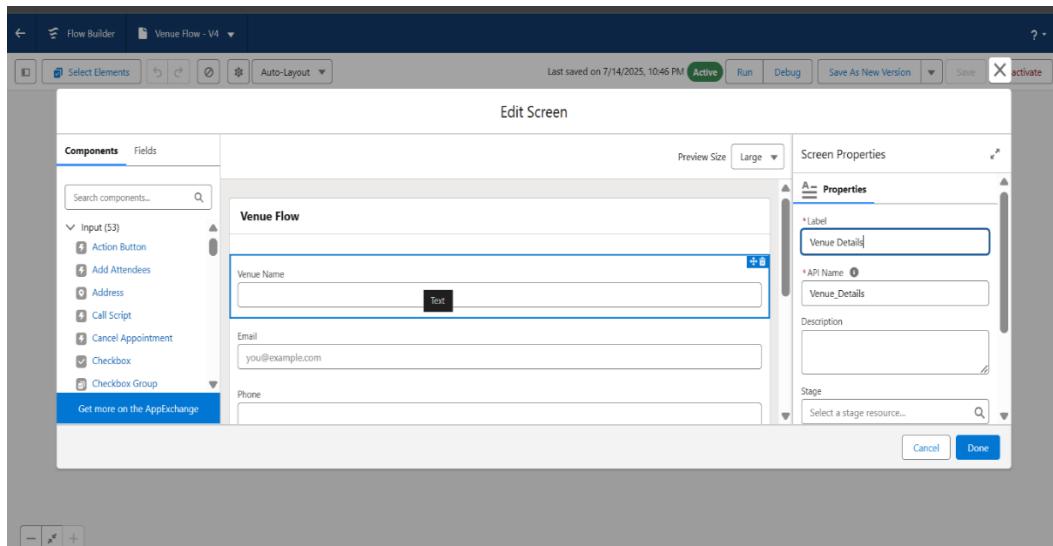
The "General Options" section includes "External ID" and "Display Format". The "Auto Number Options" section includes "Display Format". The "Created By" and "Modified By" fields show "varshi.velagacharla, 7/18/2025, 12:30 AM".

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:

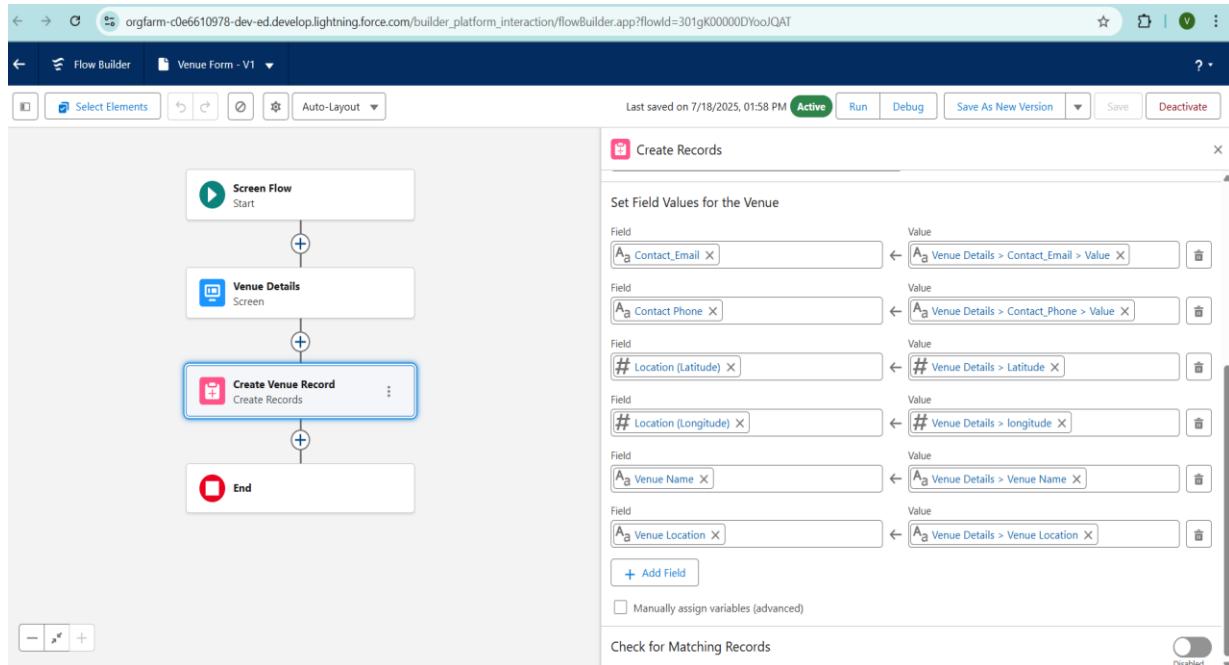
Value = Contact_Phone_c : {! Contact_Phone.value}

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

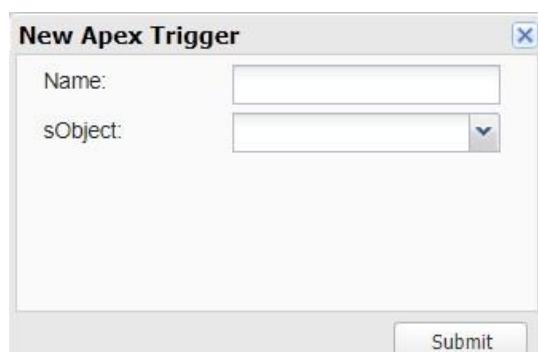
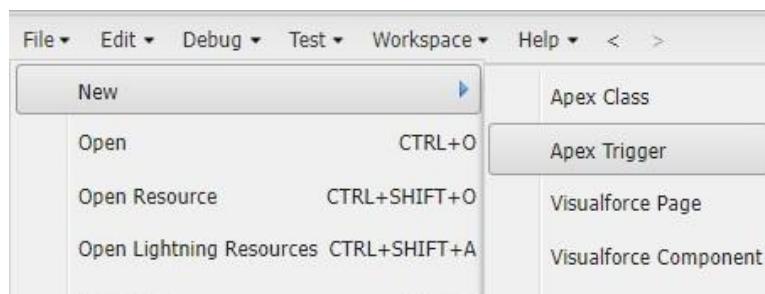
Flow API Name: Venue_Form

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;  
    }  
}
```

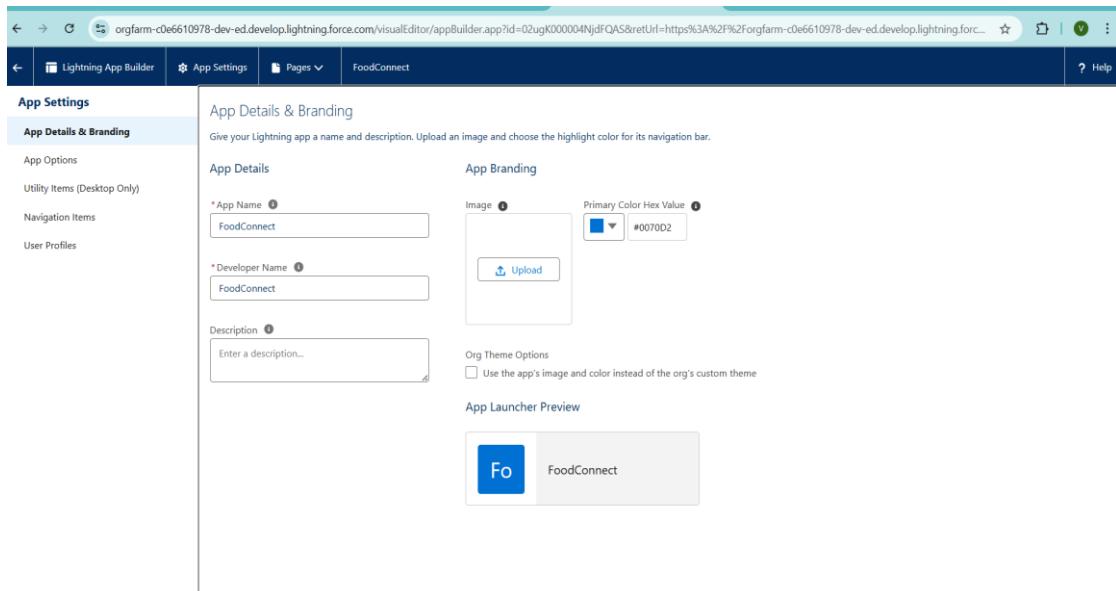


Phase 3: UI/UX Development & Customization:

Create a Lightning App

To create a lightning app page:

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



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. On the left, a sidebar lists 'App Details & Branding', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The 'App Options' tab is selected. The main content area is titled 'App Options' and contains two sections: 'Navigation and Form Factor' and 'Setup and Personalization'. Under 'Navigation and Form Factor', there are sections for 'Navigation Style' (with 'Standard navigation' selected) and 'Supported Form Factors' (with 'Desktop and phone' selected). A note explains that if not all form factors are visible, it's because the app contains items that prevent selection of one or more options. Under 'Setup and Personalization', there are sections for 'Setup Experience' (with 'Setup (full set of Setup options)' selected), 'App Personalization Settings' (with three checkboxes: 'Disable end user personalization of nav items in this app', 'Disable temporary tabs for items outside of this app', and 'Use Omni-Channel sidebar'), and a note about using the Omni-Channel sidebar.

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

5. To Add Navigation Items:

The screenshot shows the 'Navigation Items' section of the Lightning App Builder. The left sidebar includes 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)', and 'Navigation Items', with 'Navigation Items' selected. The main area is titled 'Navigation Items' and contains two lists: 'Available Items' and 'Selected Items'. The 'Available Items' list on the left shows a filtered list of items including Accounts, Activation Targets, Activations, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations, Approval Requests, Drop-Off Points, Volunteers, Execution Details, Reports, and Tasks. The 'Selected Items' list on the right currently contains Home, Venues, Drop-Off Points, Volunteers, Execution Details, Reports, and Tasks. Arrows between the lists indicate the ability to move items between them.

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:

The screenshot shows the Lightning App Builder interface with the URL <https://orgfarm-c0e6610978-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02ugK000004NjdQAS&retUrl=https%3A%2F%2Forgfarm-c0e6610978-dev-ed.develop.lightning.force.com%2FappBuilder.app>. The left sidebar has 'User Profiles' selected. The main area is titled 'User Profiles' with the sub-instruction 'Choose the user profiles that can access this app.' Below this is a 'Available Profiles' list containing various user profile names. On the right, under 'Selected Profiles', 'System Administrator' is listed. Navigation icons like back, forward, search, and help are at the top.

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.

8. Now click on Save & Run.

9. Give Label as:

10. Report Name: venue and Drop Off point

11. Report Unique Name: Auto Populated

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.

3. Then click on Start Report.

4. In GROUP ROWS: Volunteer ID

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

Volunteer Name	Venue Name	Drop-Off Point Name	Distance
- (2)	La Royale Banquet Hall	Jeedimetla	4,646.6800
	Ujwala Grand	-	-
Subtotal			4,646.6800
Bhavika (1)	Paradise Garden Function Hall	Suraram Village	3,046.9400
Subtotal			3,046.9400
Charan (1)	La Royale Banquet Hall	Shapur	1,374.3000
Subtotal			1,374.3000
Total (4)			9,067.9200

6. Now click on Save & Run.

7. 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)

1. Now click on save.
2. You can see in Analytics tab also (optional)

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 'Add Widget' modal in the Salesforce Lightning Dashboard. The report selected is 'Volunteer Task'. The preview area displays a bar chart with the following data:

Volunteer: Volunteer ID	Record Count
1	1
2	1

- Now click on save.

The screenshot shows the Salesforce Lightning Dashboard after saving the 'Volunteer Task' report as a widget. The dashboard layout includes:

- A table titled 'venue and Drop Off point' with columns: Venue Name, Drop-Off Point Name, and Distance.
- A chart titled 'Volunteer Task' showing the record count for two volunteer IDs.
- A 'Task Execution Details' section.

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 - Users page. A new user record is being created for 'Iksha Foundation'. The General Information section includes:

- First Name:** Iksha Foundation
- Last Name:** Iksha_Foundation
- Alias:** iksh
- Email:** varshi9182@gmail.com
- Username:** ikshafoundation@sb7987.o
- Nickname:** User175282821431752068
- Title:** (empty)
- Company:** (empty)
- Department:** (empty)
- Division:** (empty)

The right side of the screen displays various user profile settings and system roles, many of which are checked or set to specific values like 'NGOs Profile' for the Profile and 'Salesforce Platform' for the User License.

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 - Users page. A new user record is being created for 'NSS NSS'. The General Information section includes:

- First Name:** NSS
- Last Name:** NSS
- Alias:** mnss
- Email:** varshi9182@gmail.com
- Username:** rss567@sb.com
- Nickname:** User175282839250737964
- Title:** (empty)
- Company:** (empty)
- Department:** (empty)
- Division:** (empty)

The right side of the screen displays various user profile settings and system roles, many of which are checked or set to specific values like 'NGOs Profile' for the Profile and 'Salesforce Platform' for the User License.

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

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A specific user record is being edited, with the name 'Street_Cause' entered into both the First Name and Last Name fields. The user's profile is set to 'NGOs Profile'. Other fields like Email, Username, and Nickname are also visible.

Creation of sharing rules

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

Related Details

Venue Name	Ujwala Grand
Contact Email	varsh9182@gmail.com
Contact Phone	(948) 534-6576
Location	25, 16
Venue Location	vempalli
Created By	varshi velagacharla, 7/19/2025, 6:44 AM

Owner: varshi velagacharla

Last Modified By: varshi velagacharla, 7/19/2025, 6:44 AM

Activity

No activities to show.

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 requirements.

Drop-Off Point
Suraram Village

Related Details

Drop-Off Point Name	Suraram Village
Venue_c	Paradise Garden Function Hall
Location 2	35, 25
distance calculation	3,046.94
State	Andhra Pradesh
Distance	3,046.9400
Created By	varshi velagacharla, 7/19/2025, 6:46 AM

Owner: varshi velagacharla

Last Modified By: varshi velagacharla, 7/19/2025, 6:46 AM

Activity

No activities to show.

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.

orgfarm-c0e6610978-dev-ed.develop.lightning.force.com/lightning/r/Volunteer_c/a03gK0000051WxRQAU/view

The screenshot shows the FoodConnect application interface. At the top, there's a navigation bar with links for Home, Venues, Drop-Off Points, Volunteers, Execution Details, Reports, and Tasks. Below the navigation is a search bar and a toolbar with various icons. The main content area is titled "Volunteer" and shows details for "Bhavika". The "Details" tab is selected, displaying fields like Volunteer Name (Bhavika), Drop-Off Point (Suraram Village), Volunteer ID (2), Gender (Female), Available On (7/19/2025), Age (19), Email (varshi9182@gmail.com), Contact Number (8.179.990.295), Address (kadapa), and Date of Birth (7/8/2005). To the right, there's a "Activity" section with a header, a toolbar, filters, and a message stating "No activities to show." It also includes sections for "Upcoming & Overdue" and "Past activity".

orgfarm-c0e6610978-dev-ed.develop.lightning.force.com/lightning/r/Execution_Detail_c/a04gK00000d5mDOAQ/view

The screenshot shows the FoodConnect application interface. At the top, there's a navigation bar with links for Home, Venues, Drop-Off Points, Volunteers, Execution Details, Reports, and Tasks. Below the navigation is a search bar and a toolbar with various icons. The main content area is titled "Execution Detail" and shows details for "Execution 1". The "Details" tab is selected, displaying fields like Execution Detail Name (Execution 1), Task (Task 1), Volunteer (Bhavika), and Created By (varshi velagacharla, 7/19/2025, 8:13 AM). To the right, there's an "Activity" section with a header, a toolbar, filters, and a message stating "No activities to show." It also includes sections for "Upcoming & Overdue" and "Past activity".

Execution Detail Name: Execution 2

Task: Task 2

Volunteer: Charan

Created By: varshi.velagacharla, 7/19/2025, 8:14 AM

Last Modified By: varshi.velagacharla, 7/19/2025, 8:14 AM

Activity

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

Volunteer: Volunteer ID	Volunteer: Volunteer Name	Task: Task Name	Execution Detail: Execution Detail Name	Volunteer: Owner Name	Task: Created Date	Rating
1 (1)	Charan	Task 2	Execution 2	Iksha Foundation Iksha_Foundation	7/19/2025	5
Subtotal						
2 (1)	Bhavika	Task 1	Execution 1	Iksha Foundation Iksha_Foundation	7/19/2025	4
Subtotal						
Total (2)						

Row Counts: Detail Rows: Subtotals: Grand Total:

Screenshot of the Salesforce Lightning interface showing a report titled "Report: Venue with DropOff with Volunteer venue and Drop Off point".

The report displays the following data:

	Venue Name	Drop-Off Point Name	Distance
- (2)	La Royale Banquet Hall	Jeedimetta	4,646.6800
	Ujwala Grand	-	-
Subtotal			4,646.6800
- (1)	Paradise Garden Function Hall	Suraram Village	3,046.9400
Subtotal			3,046.9400
- (1)	La Royale Banquet Hall	Shapur	1,374.3000
Subtotal			1,374.3000
Total (4)			9,067.9200

Row Counts: Detail Rows: Subtotals: Grand Total:

Screenshot of the Salesforce Lightning interface showing the "Task Execution Details" dashboard.

The dashboard includes the following components:

- Dashboard Task Execution Details:** Last refreshed 4 days ago. Refresh this dashboard to see the latest data. As of Jul 19, 2025, 8:31 AM Viewing as varshi.velagachara
- venue and Drop Off point:**

Venue Name	Drop-Off Point Name	Distance
La Royale Banquet Hall	Jeedimetta	4.646
La Royale Banquet Hall	Shapur	1.374
Paradise Garden Function Hall	Suraram Village	3.046
Ujwala Grand	-	-
- Volunteer Task:** A chart showing Record Count vs. Volunteer ID. The chart has two points at (1, 1) and (2, 1).
- Venue Form:** A form for entering venue details:
 - Venue Name:
 - Email: you@example.com
 - Phone:
 - Venue Location:
 - Latitude:
 - Longitude:

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 demonstrates how technology can be a powerful force for social good. By leveraging Salesforce CRM, it automates food redistribution, reducing waste and fighting hunger. Real-time dashboards and communication tools improve efficiency and transparency. Its scalable design supports rapid onboarding of donors, NGOs, and volunteers. AI and chatbot integration will further optimize resource use and engagement. The platform transforms surplus into sustenance for underserved communities. It empowers nonprofits to act faster, smarter, and with greater impact. **FOODCONNECT** isn't just a tool—it's a mission in motion. It proves that innovation and compassion can solve real-world problems. And most importantly, it brings us closer to a world without hunger.