



To Supply Leftover Food To Poor



THALARI VIJAYA LAKSHMI

22701A05N9

thalarivijayalakshmi28@gmail.com

AITs, RAJAMPET

Project Overview:

This CRM system is designed to optimize the redistribution of excess food from sources such as restaurants, households, events, and other donors to those in need—like NGOs, shelters, and community volunteers. It offers a centralized platform where donors can easily list food items with relevant information such as quantity, type, expiration, and pickup time. The platform uses geo-location and real-time alerts to manage and coordinate the entire logistics process, including scheduling, routing, and pickup monitoring. Built-in tracking features help measure outcomes like meals delivered, volunteer contributions, and environmental impact (e.g., CO₂ reduction). Its communication tools ensure smooth coordination, transparency, and overall operational efficiency.

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

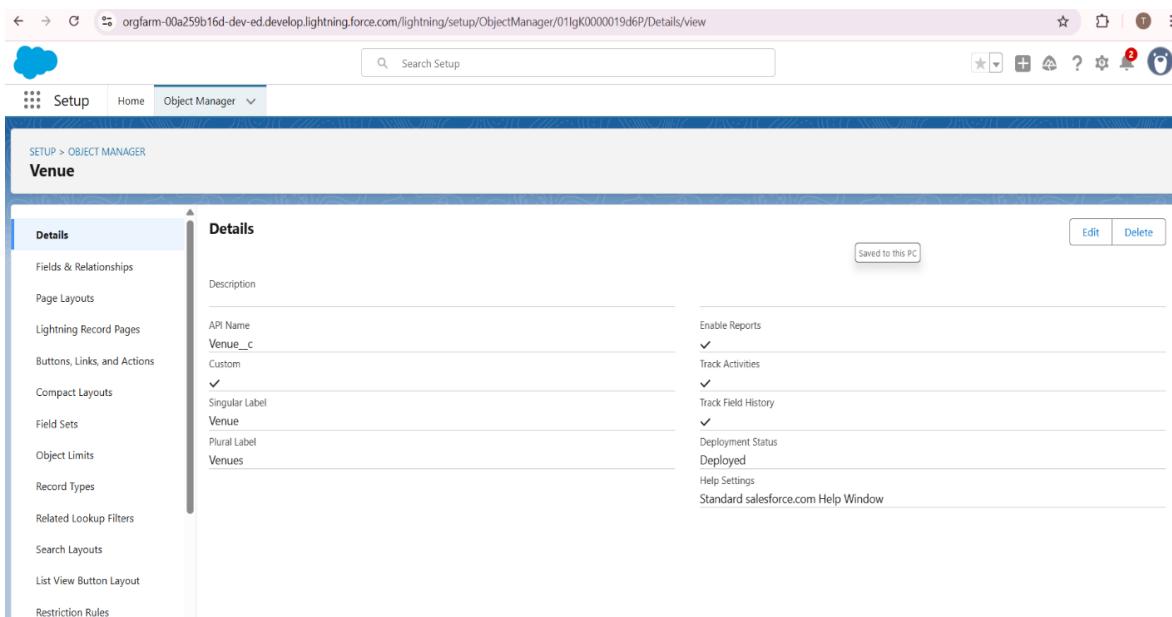
Setup environment & DevOps workflow: A dedicated Salesforce sandbox environment was set up for the development and initial testing of the FOODCONNECT CRM. This enabled isolated customization without impacting production data. A simple DevOps process was followed using Change Sets to migrate metadata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



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 links for Setup, Home, and Object Manager. A search bar is at the top right. The main title is "SETUP > OBJECT MANAGER" followed by "Drop-Off Point". On the left, a sidebar lists various configuration options: 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 content area is titled "Details" and contains fields for API Name (set to "Drop_Off_Point__c"), Singular Label (set to "Drop-Off Point"), Plural Label (set to "Drop-Off Points"), and several checkboxes for features: Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (set to "Deployed"), and Help Settings (set to "Standard salesforce.com Help Window"). At the bottom right of the details section 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**.

The screenshot shows the Salesforce Setup interface for the 'Object Manager'. The left sidebar lists various configuration options like Fields & Relationships, Page Layouts, and Record Types. The main 'Details' tab is selected for the 'Task' object. The 'Description' section contains fields for API Name (Task_c), Singular Label (Task), and Plural Label (Tasks). The 'Enable Reports' section has several checkboxes checked: 'Enable Reports', 'Track Activities', 'Track Field History', and 'Deployment Status' (set to 'Deployed'). The 'Help Settings' field is set to 'Standard salesforce.com Help Window'. At the top right, there are 'Edit' and 'Delete' buttons.

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 for the 'Object Manager'. The left sidebar lists various configuration options like Fields & Relationships, Page Layouts, and Record Types. The main 'Details' tab is selected for the 'Volunteer' object. The 'Description' section contains fields for API Name (Volunteer_c), Singular Label (Volunteer), and Plural Label (Volunteers). The 'Enable Reports' section has several checkboxes checked: 'Enable Reports', 'Track Activities', 'Track Field History', and 'Deployment Status' (set to 'Deployed'). The 'Help Settings' field is set to 'Standard salesforce.com Help Window'. At the top right, there 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 'Object Manager' setup page. In the top left, it says 'SETUP > OBJECT MANAGER'. The main title is 'Execution Detail'. On the left sidebar under 'Details', there's a list of options like Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The right panel has tabs for 'Details' and 'Fields & Relationships'. Under 'Details', the API Name is set to 'Execution_Detail_c'. Under 'Fields & Relationships', the 'Enable Reports' checkbox is checked. At the bottom right of the main area 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 'Object Manager' setup page for the 'Volunteer' object. The title is 'Volunteer Custom Field Drop-Off Point'. The left sidebar shows 'Fields & Relationships' selected. The right panel has tabs for 'Custom Field Definition Detail' and 'Validation Rules'. Under 'Custom Field Definition Detail', the 'Field Label' is 'Drop-Off Point', 'Field Name' is 'Drop_Off_Point', and 'API Name' is 'Drop_Off_Point_c'. Under 'Master-Detail Options', the 'Related To' is 'Drop-Off Point' and the 'Child Relationship Name' is 'Volunteers'. A note says 'Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.' At the bottom right are 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?' buttons.

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**.

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'SETUP > OBJECT MANAGER' and lists various options like 'Details', 'Fields & Relationships' (which is selected), 'Page Layouts', etc. The main content area is titled 'Execution Detail Custom Field' and shows a field named 'Volunteer'. The 'Field Information' section includes details such as Field Label: Volunteer, Field Name: Volunteer, API Name: Volunteer_c, Description: Help Text, Data Owner: Field Usage, Data Sensitivity Level: Compliance Categorization, and Created By: Viyaya.lakshmi.Thalari, 7/9/2025, 9:23 AM. The 'Object Name' is Execution Detail and 'Data Type' is Master-Detail. The 'Master-Detail Options' section shows Related To: Volunteer, 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, and Reparentable Master Detail: checked. A 'Help for this Page' link is also visible.

Creation of Master Detail Relationship Field on Execution Details Object :

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

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

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

Creation of Lookup Relationship Field on Task Object:

20. Setup → Object Manager → Task → Fields & Relationships → New

21. Choose **Lookup Relationship**, then **Next**
22. Select **Venue** as the related object → **Next**
23. Field Name: **Sponsored_By** (label auto-generated) → click **Next** twice → **Save**.

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-00a259b16d-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK0000019dCr/FieldsAndRelationships/00NgK0000181M61/view>. The page title is "Task Custom Field Sponsored By". The left sidebar shows navigation options like 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, and Restriction Rules. The main content area displays the "Custom Field Definition Detail" for "Sponsored_By". It includes fields for Field Label (Sponsored By), Field Name (Sponsored_By), API Name (Sponsored_By_c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By (VijayaLakshmi Thalari, 7/21/2025, 11:49 AM), Modified By (VijayaLakshmi Thalari, 7/21/2025, 11:49 AM), Object Name (Task), Data Type (Lookup), and Child Relationship Name (Tasks1). Under "Lookup Options", it shows Related To (Venue), Related List Label (Tasks (Sponsored By)), and Required (unchecked). A note at the bottom says "What to do if the lookup record is deleted? Clear the value of this field." There is also a "Lookup Filter" section.

Creation of Lookup Relationship Field on Task Object:

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

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named 'Drop-Off Point' is being created for the 'Task' object. The 'Field & Relationships' tab is selected. The field details are as follows:

- Field Label:** Drop-Off Point
- Field Name:** Drop_Off_Point
- API Name:** Drop_Off_Point_c
- Description:** (empty)
- Help Text:** (empty)
- Data Owner:** (empty)
- Field Usage:** (empty)
- Data Sensitivity Level:** (empty)
- Compliance Categorization:** (empty)

Relationship details:

- Related To:** Drop-Off Point
- Related List Label:** Tasks
- Required:**
- Child Relationship Name:** Tasks

General Options:

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

Validation Rules: [New]

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 under the Object Manager. A custom field named 'Contact Email' is being created for the 'Venue' object. The 'Field & Relationships' tab is selected. The field details are as follows:

- Field Label:** Contact Email
- Field Name:** Contact_Email
- API Name:** Contact_Email_c
- Description:** (empty)
- Help Text:** (empty)
- Data Owner:** (empty)
- Field Usage:** (empty)
- Data Sensitivity Level:** (empty)
- Compliance Categorization:** (empty)

Relationship details:

- Related To:** (empty)
- Related List Label:** (empty)
- Required:**
- Child Relationship Name:** (empty)

General Options:

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

Validation Rules: [New]

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 creating a custom field. The URL in the browser is <https://orgfarm-00a259b16d-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK0000019d6P/FieldsAndRelationships/00NgK000016nEnd/view>. The page title is "SETUP > OBJECT MANAGER" and the specific object is "Venue". The left sidebar shows various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area shows the "Custom Field Definition Detail" for a field named "Contact Phone". The "Field Information" section includes details such as Field Label: Contact Phone, Field Name: Contact_Phone, API Name: Contact_Phone__c, Data Type: Phone, and Object Name: Venue. The "General Options" section shows "Required" checked. The "Validation Rules" section indicates "No validation rules defined". 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:

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).

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 creating a custom field. The URL is orgfarm-00a259b16d-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK0000019dBF/FieldsAndRelationships/00NgK000016nF1x/view. The page title is 'SETUP > OBJECT MANAGER Drop-Off Point'. The left sidebar is under 'Fields & Relationships' and includes options like Details, 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 content area shows the 'Custom Field Definition Detail' for 'Drop-Off Point Custom Field Location 2'. It has tabs for Edit, Set Field Level Security, View Field Accessibility, and Where is this used? The 'Field Information' section shows the following details:
Field Label: Location 2
Field Name: Location_2
API Name: Location_2_c
Description: Enter the Geolocation of the Drop off Point
Object Name: Drop-Off Point
Data Type: Geolocation
Created By: VijayaLakshmi.Thalari, 7/9/2025, 7:14 PM
Modified By: VijayaLakshmi.Thalari, 7/9/2025, 7:14 PM
The 'General Options' section has 'Required' checked. The 'Geolocation Options' section has 'Decimal' checked and 'Rounded Distance' dropdown set to 'Meters'.

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.

Drop-Off Point Custom Field
distance calculation

Custom Field Definition Detail

Field Information

- Field Label: distance calculation
- Field Name: distance_calculation
- API Name: distance_calculation_c
- Description:
- Help Text:
- Data Owner:
- Field Usage:
- Data Sensitivity Level:
- Compliance Categorization:

Created By: Vijayalakshmi Thalai, 7/9/2025, 7:18 PM

Object Name: Drop-Off Point

Formula Options

- Data Type: Formula
- Decimal Places: 2

DISTANCE(Location__c, Venue__r.Location__c, 'km')

Modified By: Vijayalakshmi Thalai, 7/9/2025, 7:18 PM

To create another fields in an object:

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

Drop-Off Point Custom Field
State

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: Vijayalakshmi Thalai, 7/9/2025, 7:21 PM

Object Name: Drop-Off Point

General Options

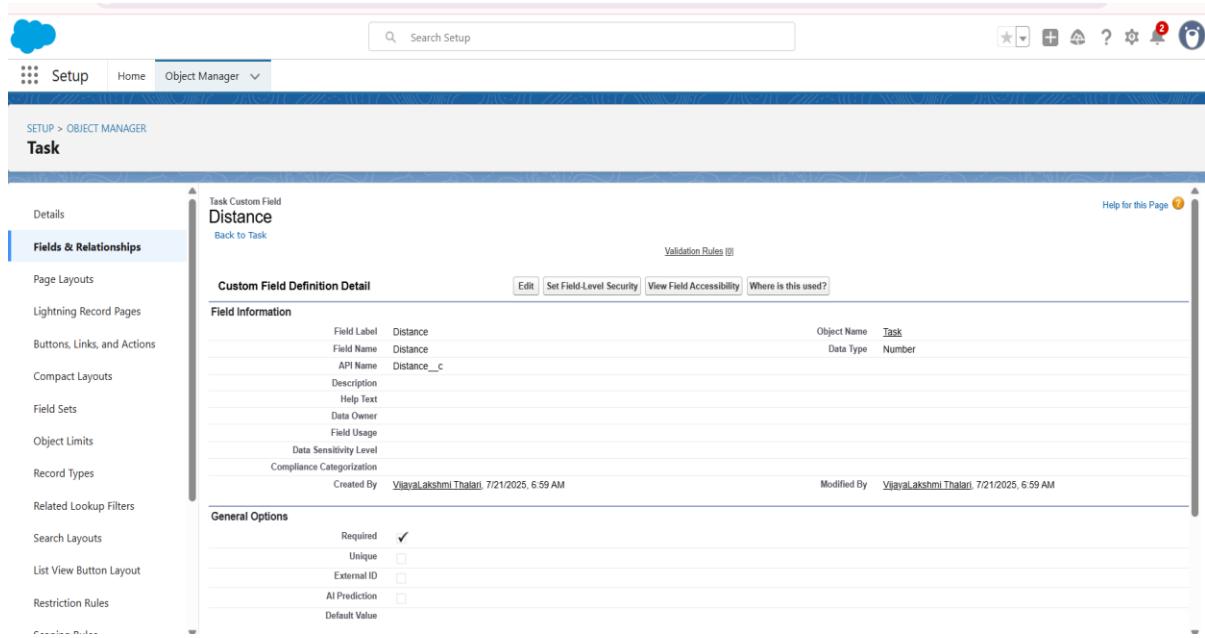
- Required:
- Default Value:

Picklist Options

Restrict picklist to the values defined in the value set

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 under the Object Manager. A custom field named 'Task ID' has been created for the 'Task' object. The field is of type 'Auto Number' and is labeled 'Task ID'. It has an API name of 'Task_ID__c'. The 'Required' checkbox is checked in the General Options section.

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 under the Object Manager. A custom field named 'Date' has been created for the 'Task' object. The field is of type 'Date' and is labeled 'Date'. It has an API name of 'Date__c'. The 'Required' checkbox is checked in the General Options section. A validation rule is also defined for this field.

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 Setup interface. On the left, there's a sidebar with various 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 area is titled 'Task Custom Field Food Category'. It shows the 'Custom Field Definition Detail' section with tabs for Edit, Set Field-Level Security, View Field Accessibility, and Where is this used?. Under 'Field Information', it lists Field Label (Food Category), Field Name (Food_Category), API Name (Food_Category__c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, and Created By (VijayaLakshmi.Thalaj). It also shows Object Name (Task) and Data Type (Picklist (Multi-Select)). The 'General Options' section has 'Required' checked and 'Default Value' set to blank. The 'Picklist (Multi-Select) Options' section has 'Restrict picklist to the values defined in the value set' checked and 'Controlling Field' set to 'None'. At the bottom, there are buttons for Help for this Page, Back to Task, and a vertical scroll bar.

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. The left sidebar is titled 'SETUP > OBJECT MANAGER' and lists various options under 'Fields & Relationships'. The main content area is titled 'Task Custom Field Number of People Served' and shows the 'Custom Field Definition Detail' for the field 'Number of People Served'. The field details include:

- Field Information:**
 - Field Label: Number of People Served
 - Field Name: Number_of_People_Served
 - API Name: Number_of_People_Served_c
 - Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By: Vijayalakshmi Thalari, 7/9/2025, 7:29 PM
 - Object Name: Task
 - Data Type: Number
- General Options:**
 - Required:
 - Unique:
 - External ID:
 - AI Prediction:
 - Default Value: [empty]

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 Object Manager interface. The left sidebar is titled 'SETUP > OBJECT MANAGER' and lists various options under 'Fields & Relationships'. The main content area is titled 'Task Custom Field Name of the Person' and shows the 'Custom Field Definition Detail' for the field 'Name of the Person'. The field details include:

- Field Information:**
 - Field Label: Name of the Person
 - Field Name: Name_of_the_Person
 - API Name: Name_of_the_Person_c
 - Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By: Vijayalakshmi Thalari, 7/9/2025, 7:31 PM
 - Object Name: Task
 - Data Type: Text
- General Options:**
 - Required:
 - Unique:
 - Case Sensitive:
 - External ID:
 - Default Value: [empty]

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 .

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'SETUP > OBJECT MANAGER' and lists various options under 'Fields & Relationships'. The 'Field Sets' option is currently selected. The main content area displays a 'Custom Field Definition Detail' for a field named 'Phone'. The 'Field Information' section shows the following details:

- Field Label: Phone
- Field Name: Phone
- API Name: Phone__c
- Description: Help Text
- Data Owner: Field Usage
- Data Sensitivity Level: Compliance Categorization
- Created By: VijayaLakshmi Thalari, 7/9/2025, 7:32 PM
- Object Name: Task
- Data Type: Phone
- Modified By: VijayaLakshmi Thalari, 7/9/2025, 7:32 PM

The 'General Options' section includes 'Required' (unchecked) and 'Default Value'. The 'Validation Rules' section indicates '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.

The screenshot shows the Salesforce Setup interface for the 'Task' object. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main content area is titled 'Task Custom Field Rating'. It shows the 'Custom Field Definition Detail' for the 'Rating' field, which has a field label of 'Rating', a field name of 'Rating', and an API name of 'Rating__c'. The data type is listed as 'Picklist'. The 'Field Information' section includes fields for Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'General Options' section shows 'Required' is unchecked and 'Default Value' is set to null. The 'Picklist Options' section indicates that the picklist is restricted to values defined in the value set. The 'Validation Rules' section is collapsed.

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 the 'Task' object. The sidebar and navigation bar are identical to the previous screenshot. The main content area is titled 'Task Custom Field Feedback'. It shows the 'Custom Field Definition Detail' for the 'Feedback' field, which has a field label of 'Feedback', a field name of 'Feedback', and an API name of 'Feedback__c'. The data type is listed as 'Long Text Area'. The 'Field Information' section includes fields for Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'General Options' section shows 'Default Value' is set to null. The 'Long Text Area Options' section shows '# Visible Lines' set to 3 and 'Length' set to 32,768. The 'Validation Rules' section is collapsed.

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 Object Manager interface. The left sidebar is titled 'SETUP > OBJECT MANAGER' and lists various configuration options under 'Fields & Relationships'. The main content area is titled 'Volunteer Custom Field' and 'Volunteer ID'. It displays the 'Custom Field Definition Detail' page for the 'Volunteer ID' field. 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 'Object Name' is 'Volunteer'. The 'General Options' section includes an 'External ID' checkbox, which is unchecked. The 'Auto Number Options' section includes a 'Display Format' dropdown, which is currently empty. At the bottom of the page, there are buttons for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The top of the page has a search bar and various navigation icons.

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 Setup interface under the Object Manager section for the 'Volunteer' object. A custom field named 'Gender' is being edited. The 'Field Information' section shows the following details:

- Field Label:** Gender
- Field Name:** Gender
- API Name:** Gender_c
- Description:** Help Text
- Data Owner:** Data Owner
- Field Usage:** Field Usage
- Data Sensitivity Level:** Data Sensitivity Level
- Compliance Categorization:** Compliance Categorization
- Created By:** VijayaLakshmi Thalari, 7/9/2025, 7:42 PM
- Modified By:** VijayaLakshmi Thalari, 7/9/2025, 7:42 PM

The 'General Options' section includes:

- Required:**
- Default Value:**

The 'Picklist Options' section includes:

- Restrict picklist to the values defined in the value set

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).

The screenshot shows the Salesforce Setup interface under the Object Manager section for the 'Volunteer' object. A custom field named 'Available On' is being edited. The 'Field Information' section shows the following details:

- Field Label:** Available On
- Field Name:** Available_On
- API Name:** Available_On_c
- Description:** Volunteer Custom Field: Available On ~ Salesforce - Developer Edition
- Data Owner:** Data Owner
- Field Usage:** Field Usage
- Data Sensitivity Level:** Data Sensitivity Level
- Compliance Categorization:** Compliance Categorization
- Created By:** VijayaLakshmi Thalari, 7/9/2025, 7:42 PM
- Modified By:** VijayaLakshmi Thalari, 7/9/2025, 7:42 PM

The 'General Options' section includes:

- Required:**
- Default Value:**

The 'Validation Rules' section includes:

- 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.

The screenshot shows the Salesforce Setup interface for creating a custom field. The URL is orgfarm-00a259b16d-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01gK0000019dHh/FieldsAndRelationships/00NgK000016nNtx/view. The page title is "Volunteer Custom Field Age". The "Fields & Relationships" tab is selected in the sidebar. The main content area displays the "Custom Field Definition Detail" for the "Age" field. The "Field Information" section shows the field label "Age", field name "Age", API name "Age__c", and data type "Number". The "General Options" section has the "Required" checkbox checked. The "Object Name" is listed as "Volunteer". The "Created By" and "Modified By" fields both show "Vijayalakshmi Thalari" with the timestamp "7/9/2025, 7:43 PM".

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 under the Object Manager for the 'Volunteer' object. A custom field named 'Email' has been created. 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 'Required' checked. The 'Validation Rules' section is empty.

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 under the Object Manager for the 'Volunteer' object. A custom field named 'Contact Number' has been created. The 'Field Information' section shows the field label as 'Contact Number', field name as 'Contact_Number', API name as 'Contact_Number__c', and data type as 'Number'. The 'General Options' section has 'Required' checked. The 'Validation Rules' section is empty.

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 Object Manager interface. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The 'Fields & Relationships' tab is selected. In the main content area, a 'Volunteer Custom Field' named 'Address' is being edited. The 'Field Information' section shows the field label 'Address', field name 'Address', API name 'Address__c', object name 'Volunteer', and data type 'Long Text Area'. The 'General Options' section includes a 'Default Value' field. The 'Long Text Area Options' section shows '# Visible Lines' set to 3 and a length of 32,768. A 'Validation Rules' section at the bottom indicates 'No validation rules defined.'

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.

The screenshot shows the Salesforce Object Manager interface. The sidebar and navigation bar are identical to the previous screenshot. In the main content area, a 'Volunteer Custom Field' named 'Date of Birth' is being edited. The 'Field Information' section shows the field label 'Date of Birth', field name 'Date_of_Birth', API name 'Date_of_Birth__c', object name 'Volunteer', and data type 'Date'. The 'General Options' section includes a 'Required' checkbox which is unchecked. The 'Validation Rules' section at the bottom indicates 'No validation rules defined.'

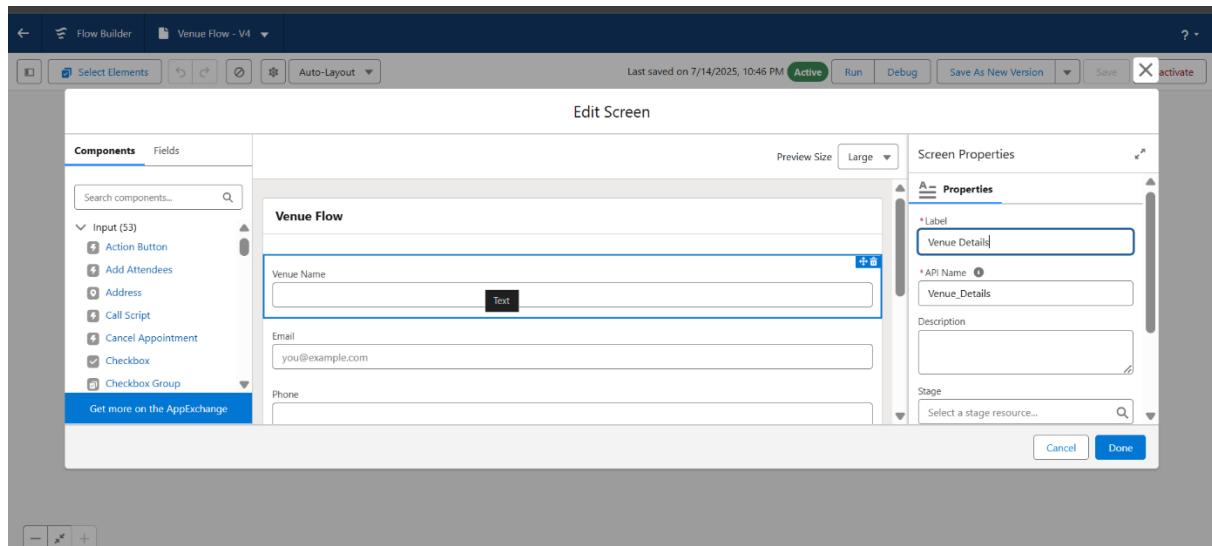
Creation of fields for the Execution Details object:

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 the 'Volunteer' object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The 'Fields & Relationships' tab is selected. In the main content area, a custom field named 'Execution ID' is being defined under the 'Volunteer Custom Field' section. The 'Field Information' table includes columns for Field Label (Execution ID), Field Name (Execution_ID), API Name (Execution_ID_c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'General Options' section shows External ID checked. The 'Auto Number Options' section shows Display Format. At the top right, there are buttons for Edit, Set Field-Level Security, View Field Accessibility, and Where is this used?

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:

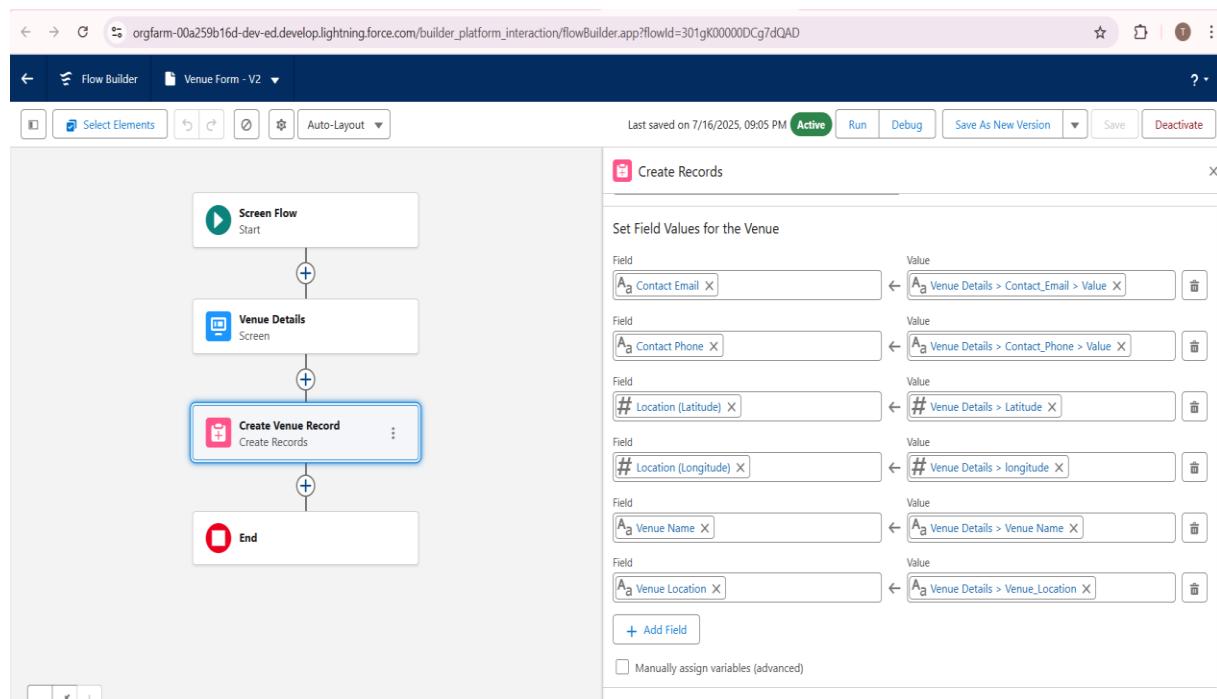
Value = Contact_Phone__c : {! Contact_Phone.value}

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

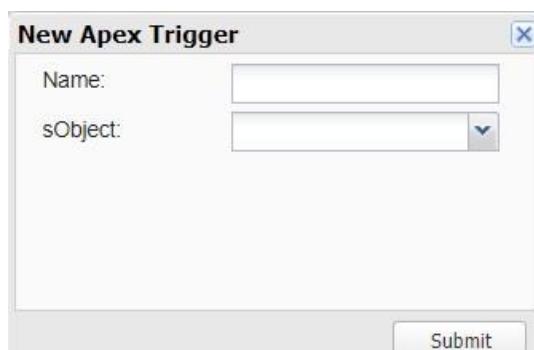
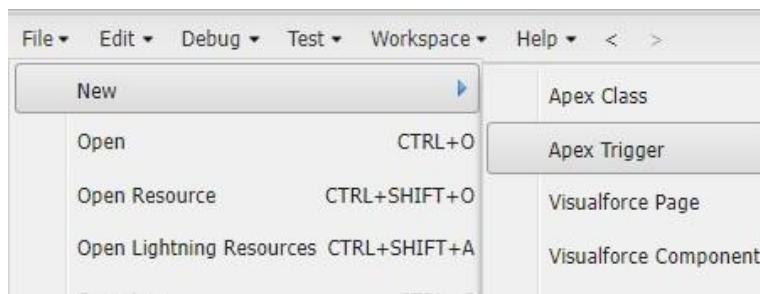
Flow API Name: Venue_Form

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

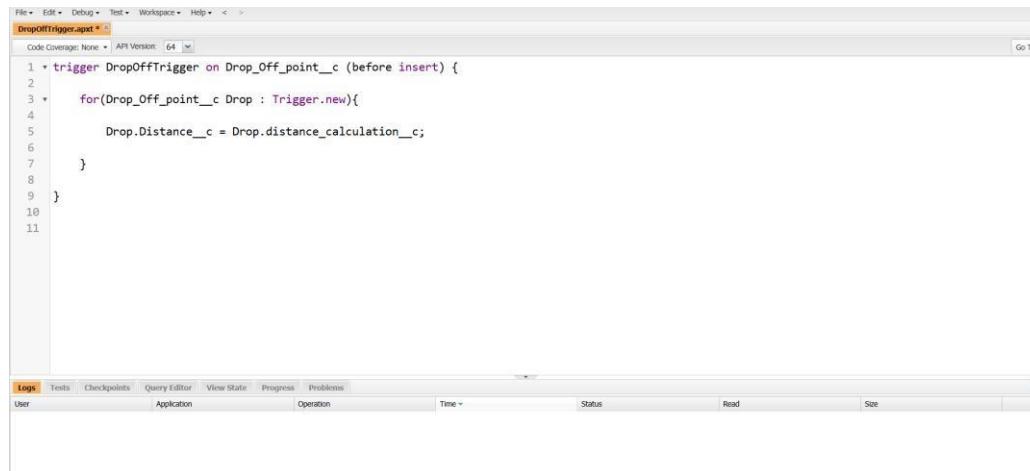


Trigger Code

(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**.

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

5. To Add Navigation Items:

The screenshot shows the 'Navigation Items' configuration screen in the Lightning App Builder. The left sidebar has 'App Settings' selected. Under 'Navigation Items', there are two sections: 'Available Items' and 'Selected Items'. The 'Available Items' section contains a list of items with icons: Accounts, Activation Targets, Activations, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations, and Approval Requests. The 'Selected Items' section contains a list of items: Home, Venues, Drop-Off Points, Tasks, Volunteers, Execution Details, Reports, and Dashboards. There are up and down arrow buttons between the two sections 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 'User Profiles' configuration screen in the Lightning App Builder. The left sidebar has 'App Settings' selected. Under 'User Profiles', there are two sections: 'Available Profiles' and 'Selected Profiles'. The 'Available Profiles' section contains a list of profiles: Analytics Cloud Integration User, Analytics Cloud Security User, Anypoint Integration, Authenticated Website, Authenticated Website, B2B Reordering Portal Buyer Profile, Contract Manager, Custom: Marketing Profile, Custom: Sales Profile, Custom: Support Profile, and Customer Community Login User. The 'Selected Profiles' section contains one profile: System Administrator. There are up and down arrow buttons between the two sections to move profiles between them.

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

- Click on New Folder.

Folder Label: Custom Reports

Folder Unique Name: CustomReports

- Open Custom Reports and click on New Report
- Select Report

Type: Venue with DropOff with Volunteer

- Then click on Start Report.
- In GROUP ROWS: Add Volunteer Name
- In Columns: Add Venue Name, Drop-Off point Name, Distance.

The screenshot shows the FoodConnect application interface with a report titled "venue and Drop Off point" filtered to "Venue with DropOff with Volunteer". The report preview displays a table with the following data:

Volunteer Name	Venue Name	Drop-Off Point Name	Distance
- (2)	Shapur	La Royale Banquet hall	28.2332
	Ujwala Grand	Sharug	-
Subtotal			28.2332
Sujitha (1)	La Royale Banquet Hall	jeedimetta	6,902.9995
Subtotal			6,902.9995
Tejaswini (1)	KPHB Public park	KPHB colony	-
Subtotal			0.0000
Vennela (1)	Paradise Garden Function hall	Suraram Village	5.1161
Subtotal			5.1161
vijayalakshmi (1)	La Royale Banquet Hall	Shapur	5.1161
Subtotal			5.1161
Total (6)			6,941.4649

- Now click on Save & Run.

- Give Label as:

- Report Name: venue and Drop Off point

- 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

- Go to the app (FoodConnect) >> click on the reports tab
- Click on Custom Reports Folder and click on New Report
- 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.

Volunteer: Volunteer ID	Task: Task Name	Execution Detail: Execution Detail Name	Volunteer: Volunteer Name	Task: Owner Name	Date	Rating
4 (1)	Task 1	Execution 1	vijayalakshmi	VijayaLakshmi Thalari	3/28/2025	4
5 (1)	Task 2	Execution 2	Sujitha	VijayaLakshmi Thalari	3/28/2024	5
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 'Edit Widget' dialog. On the left, under 'Report', there is a search bar with 'venue and Drop Off point' and a clear icon. Below it is a checkbox for 'Use chart settings from report'. Under 'Display As', there is a grid of icons representing different chart types, with the 'Table' icon selected. There are also sections for 'Groups' and 'Columns'. On the right, the 'Preview' section shows a table titled 'venue and Drop Off point' with the following data:

Venue Name ↑	Drop-Off Point Name	Distance
KPHB Public park	KPHB colony	-
La Royale Banquet Hall	Shapur	5.1161
La Royale Banquet Hall	jeedimetla	6.9030k
Paradise Garden Function hall	Suraram Village	5.1161
Shapur	La Royale Banquet hall	28.2332
Ujwalla Grand	Sharug	-

At the bottom right of the dialog are 'Cancel' and 'Update' 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)

Report

Volunteer Task X

Use chart settings from report

Display As

X-Axis

Volunteer: Volunteer ID

Y-Axis

Record Count

Volunteer Task

Record Count

1
0.5
0

1 2

Volunteer: Volunteer ID

[View Report \(Volunteer Task\)](#)

1. Now click on save.

Venue Name	Drop-Off Point Name	Distance
KPHB Public park	KPHB colony	-
La Royale Banquet Hall	Shapur	5.1161
La Royale Banquet Hall	jeedimetla	6.9030x
Paradise Garden Function hall	Suraram Village	5.1161
Shapur	La Royale Banquet hall	28.2332
Ujwala Grand	Shang	-

Volunteer Task

Record Count

1
0.8
0.6
0.4
0.2
0

4 5

Volunteer: Volunteer ID

[View Report \(Volunteer Task\)](#)

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:

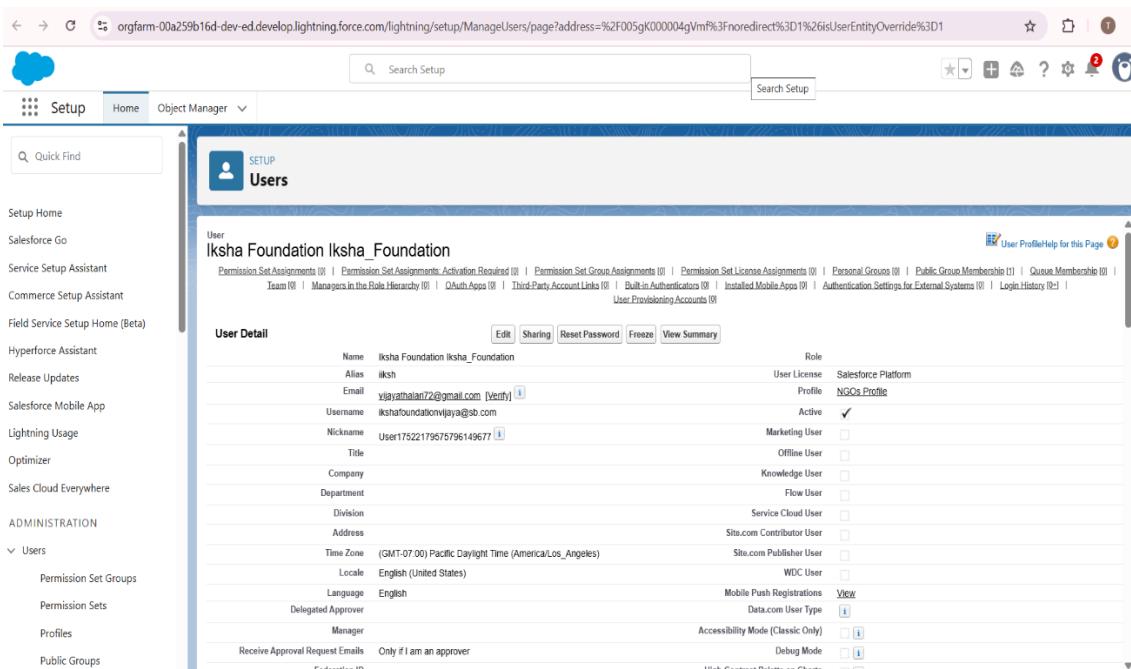
Field History Tracking was enabled on key objects such as Food Donation and Pickup Schedule to maintain an audit trail of critical changes like pickup time adjustments or status updates. Duplicate Rules and Matching Rules were configured on the Donor and Recipient records to prevent redundant entries 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 with the 'Users' tab selected. On the left, the navigation sidebar includes links for Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, and Administration. Under Administration, the 'Users' section is expanded, showing links for Permission Set Groups, Permission Sets, Profiles, and Public Groups. The main content area shows a user record for 'Iksha Foundation Iksha_Foundation'. The 'User Detail' section contains fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, and Receive Approval Request Emails. Above these fields are buttons for Edit, Sharing, Reset Password, Freeze, and View Summary. To the right of the detail section is a grid of checkboxes for various roles and user licenses, with 'NGOs Profile' checked under 'User License'. Other checked items include 'Active', 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Mobile Push Registration', 'Data.com User Type', 'Accessibility Mode (Classic Only)', and 'Debug Mode'. A note at the bottom states 'Mobile Push Registration is available for Site.com users only'.

5.

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' section. A new user record is being created for 'NSS NSS'. The 'User Detail' section includes fields for Name (NSS NSS), Alias (nsss), Email (vijayathalan72@gmail.com), Username (nss@stbijaya.com), Nickname (User1752218229558215905), Title, Company, Department, Division, Address, Time Zone (GMT-07:00 Pacific Daylight Time (America/Los_Angeles)), Locale (English (United States)), Language (English), Delegated Approver, Manager, Receive Approval Request Emails (Only if I am an approver), Role (Marketing User, Active checked), User License (Salesforce Platform, NGO's Profile), Profile (NGO's Profile), and various other checkboxes for Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations (Data.com User Type), Accessibility Mode (Classic Only), and Debug Mode.

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

The screenshot shows the Salesforce Setup interface under the 'Users' section. A new user record is being created for 'Street_Cause Street_Cause'. The 'User Detail' section includes fields for Name (Street_Cause Street_Cause), Alias (stre), Email (vijayathalan72@gmail.com), Username (stre@stbijaya.com), Nickname (User17522184916079082269), Title, Company, Department, Division, Address, Time Zone (GMT-07:00 Pacific Daylight Time (America/Los_Angeles)), Locale (English (United States)), Language (English), Delegated Approver, Manager, Receive Approval Request Emails (Only if I am an approver), Role (Marketing User, Active checked), User License (Salesforce Platform, NGO's Profile), Profile (NGO's Profile), and various other checkboxes for Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations (Data.com User Type), Accessibility Mode (Classic Only), and Debug Mode.

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

The screenshot shows a CRM application window with the following details:

- Header:** The URL is orgfarm-00a259b16d-dev-ed.lightning.force.com/lightning/r/Venue_c/a00gK00000AoTVvQAN/view. The top navigation bar includes links for Venues, Tasks, Drop-Off Points, Execution Details, Volunteers, Reports, and Dashboards.
- Venue Record:** The main area displays a record for "La Royale Banquet Hall".
 - Related:** Fields include Venue Name (La Royale Banquet Hall), Contact Email (thalari.vijaya16@gmail.com), Contact Phone ((739) 669-4425), Location, and Venue Location.
 - Details:** Fields include Owner (VijayaLakshmi Thalari), Created By (VijayaLakshmi Thalari, 7/15/2025, 8:17 AM), and Last Modified By (VijayaLakshmi Thalari, 7/15/2025, 8:17 AM).
- Activity:** A sidebar titled "Activity" shows a toolbar with icons for various actions. It includes filters for "All time • All activities • All types" and buttons for "Refresh", "Expand All", and "View All". The activity section is currently empty, stating "No activities to show. Get started by sending an email, scheduling a task, and more."

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

The screenshot shows the FoodConnect application interface. At the top, there is a navigation bar with links for Venues, Tasks, Drop-Off Points, Execution Details, Volunteers, Reports, and Dashboards. A search bar is located at the top center. On the left, a sidebar titled "Venue Shapur" shows the venue's name, owner (Vijayalakshmi Thalari), contact information, and location. The main content area is titled "Details" and contains fields for Venue Name (Shapur), Contact Email (thalarivijaya16@gmail.com), Contact Phone (939) 042-3152, Location, and Venue Location. It also shows the creation date (7/15/2025, 8:13 AM) and the last modified date (7/15/2025, 8:13 AM). To the right, there is an "Activity" section with a toolbar, filters, and a message stating "No activities to show. Get started by sending an email, scheduling a task, and more." Below this is a message stating "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.

The screenshot shows the FoodConnect application interface, similar to the previous one but for a different venue. The title bar indicates the URL is orgfarm-00a259b16d-dev-ed.lightning.force.com/lightning/r/Venue_c/a00gK00000AoZmPQAV/view. The navigation bar and search bar are identical. The sidebar on the left shows the venue's name (Paradise Garden Function hall), owner (Vijayalakshmi Thalari), contact information, and location (12, 65). The main content area is titled "Details" and contains fields for Venue Name, Contact Email (thalarivijaya16@gmail.com), Contact Phone (739) 669-4425, Location, and Venue Location. It also shows the creation date (7/15/2025, 8:23 AM) and the last modified date (7/15/2025, 8:23 AM). To the right, there is an "Activity" section with a toolbar, filters, and a message stating "No activities to show. Get started by sending an email, scheduling a task, and more." Below this is a message stating "No past activity. Past meetings and tasks marked as done show up here."

Execution Detail Execution 1

Execution Detail Name: Execution 1

Volunteer: vijayalakshmi

Task: Task 1

Execution ID: 1

Created By: VijayaLakshmi Thalari, 7/15/2025, 9:00 AM

Last Modified By: VijayaLakshmi Thalari, 7/15/2025, 9:00 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.

Execution Detail Execution 2

Execution Detail Name: Execution 2

Volunteer: Sujitha

Task: Task 2

Execution ID: 2

Created By: VijayaLakshmi Thalari, 7/15/2025, 9:01 AM

Last Modified By: VijayaLakshmi Thalari, 7/15/2025, 9:01 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

<input type="checkbox"/> Volunteer: Volunteer ID	Task: Task Name	Execution Detail: Execution Detail Name	Volunteer: Volunteer Name	Task: Owner Name	Date	Rating
<input type="checkbox"/> 4 (1)	Task 1	Execution 1	vijayalakshmi	VijayaLakshmi Thalari	3/28/2025	4
Subtotal						
<input type="checkbox"/> 5 (1)	Task 2	Execution 2	Sujitha	VijayaLakshmi Thalari	3/28/2024	5
Subtotal						
Total (2)						

Report: Venue with DropOff with Volunteer

venue and Drop Off point

Total Records 6 Total Distance 6,941.4649

<input type="checkbox"/> Volunteer Name	Venue Name	Drop-Off Point Name	Distance
<input type="checkbox"/> - (2)	Ujwalla Grand	Sharug	-
	Shapur	La Royale Banquet hall	28.2332
Subtotal			28.2332
<input type="checkbox"/> Sujitha (1)	La Royale Banquet Hall	jeedimetta	6,902.9995
Subtotal			6,902.9995
<input type="checkbox"/> Tejaswini (1)	KPHB Public park	KPHB colony	-
Subtotal			0.0000
<input type="checkbox"/> Vennela (1)	Paradise Garden Function hall	Suraram Village	5.1161
Subtotal			5.1161
<input type="checkbox"/> vijayalakshmi (1)	La Royale Banquet Hall	Shapur	5.1161
Subtotal			5.1161
Total (6)			6,941.4649

Dashboard Task Execution Details

Last refreshed 5 days ago. Refresh this dashboard to see the latest data.

As of Jul 15, 2025, 8:56 AM Viewing as Vijaya.Lakshmi.Thalari

Venue Name	Drop-Off Point	Distance
KPHB Public park	KPHB colony	-
La Royale Banquet Hall	Shapur	5.11€
La Royale Banquet Hall	jeedimetta	6.90€
Paradise Garden Function hall	Suraram Village	5.11€
Shapur	La Royale Banquet hall	28.2€
Ujawala Grand	Sharug	-

Volunteer Task

Record Count: 1

Volunteer: Volunteer ID

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.