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TITLE

To Supply Leftover Food to Poor Using Salesforce



To Supply Leftover Food To Poor

Project Overview

Here's Leftover The initiative aims to leverage Salesforce as a centralized platform to manage the collection, tracking, and distribution of leftover food from restaurants, hotels, events, and households to people in need. By using Salesforce's CRM, automation, and analytics capabilities, the system can connect food donors, volunteers, and NGOs in real-time, ensuring surplus food is distributed efficiently and safely.

Objective

The primary objective of this project is to reduce food wastage and ensure surplus food is efficiently redistributed to poor and needy communities by leveraging Salesforce as a centralized platform.

Specific Objectives:

- Streamline Food Donations Enable restaurants, hotels, and event organizers to easily register and report leftover food.
- Bridge Donors&Beneficiaries Connect food donors with NGOs, shelters, and underprivileged groups in real time.
- Optimize Logistics Track and manage volunteers, delivery partners, and food distribution routes effectively.
- Ensure Transparency&Accountability Use Salesforce dashboards and reports to monitor donated food, deliveries, and impact.
- Support CSR Initiatives – Provide corporations with a scalable platform to contribute to social good while meeting CSR goals.

Student Outcomes

By working on this project, students will be able to:

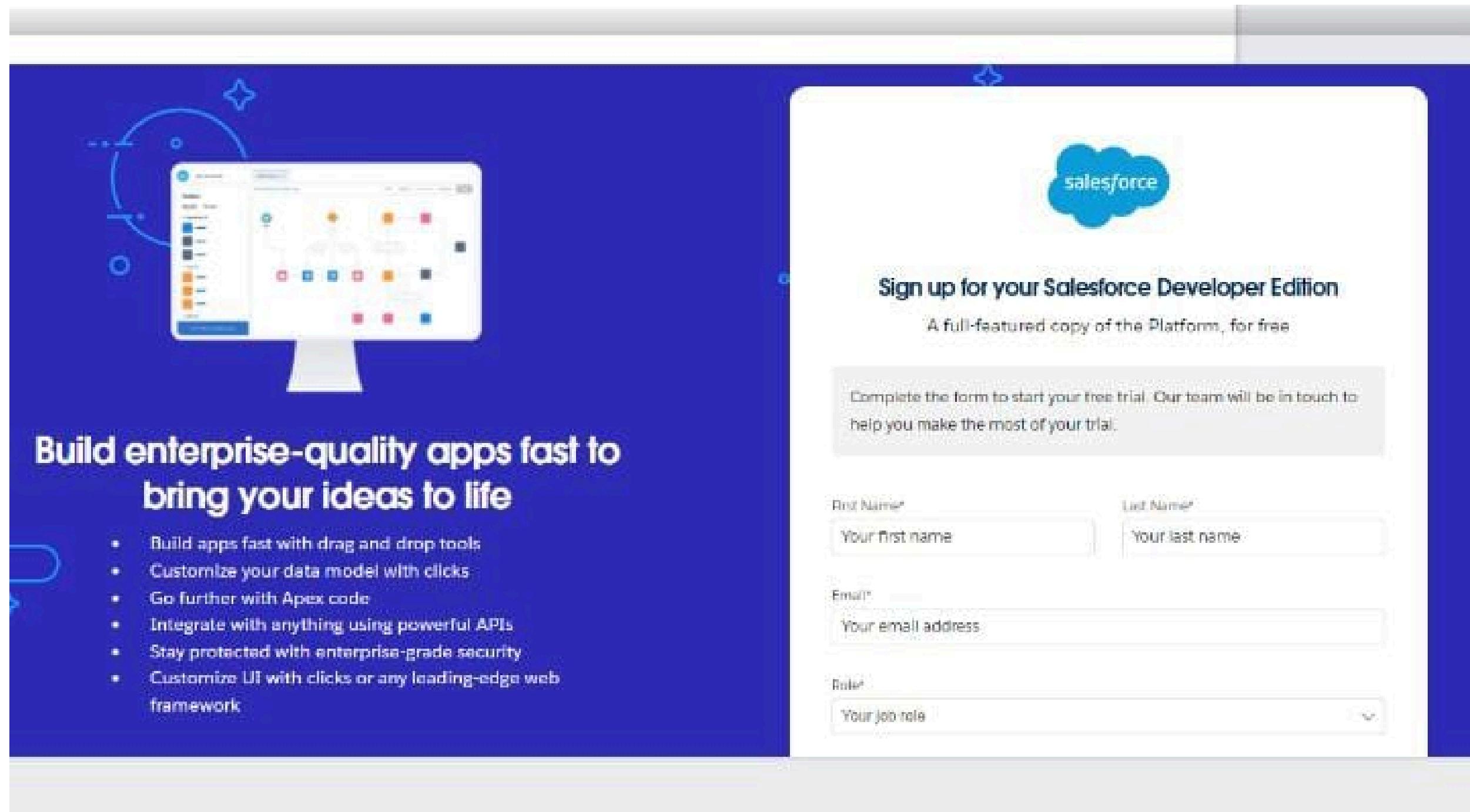
1. Technical Skills Gain hands-on experience in Salesforce CRM, including objects, flows, automation, and dashboards. Learn to design and implement cloud-based solutions for real-world social problems. Understand data management, workflow automation, and integration with external apps (like maps/ logistics).
2. Problem-Solving Skills Develop innovative solutions to reduce food wastage. Apply analytical thinking to match food supply with demand efficiently. Explore how technology can directly impact social welfare.
3. Project Management Skills Work in teams to plan, design, and execute the project. Practice requirement gathering, documentation, and reporting. Learn agile methodology by iteratively improving the solution.

Module: Salesforce

Activity I: Creating Developer Account

Creating a developer org in salesforce:

- Go to <https://developer.salesforce.com/signup>
- On the Sign up form, enter the following details:



- First name and Last name
 - Email Address
 - Role: Developer
 - Company: College Name
 - Country: India
 - Postal Code: Pin code
 - Username: should be a combination of your name and company
-
- This is an format for email id, here is an example of email format
 - Click on sign me up after filling these.

Account Activation

- Go to the inbox of the email that you used while signing up. Click on the Reset Password to activate your account. The email may take 5-10mins
- Click on Reset Password
- Give a password and answer a security question and click on change password.

Change Your Password

Enter a new password for **lead@sb.oom**.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

New Password
***** Good

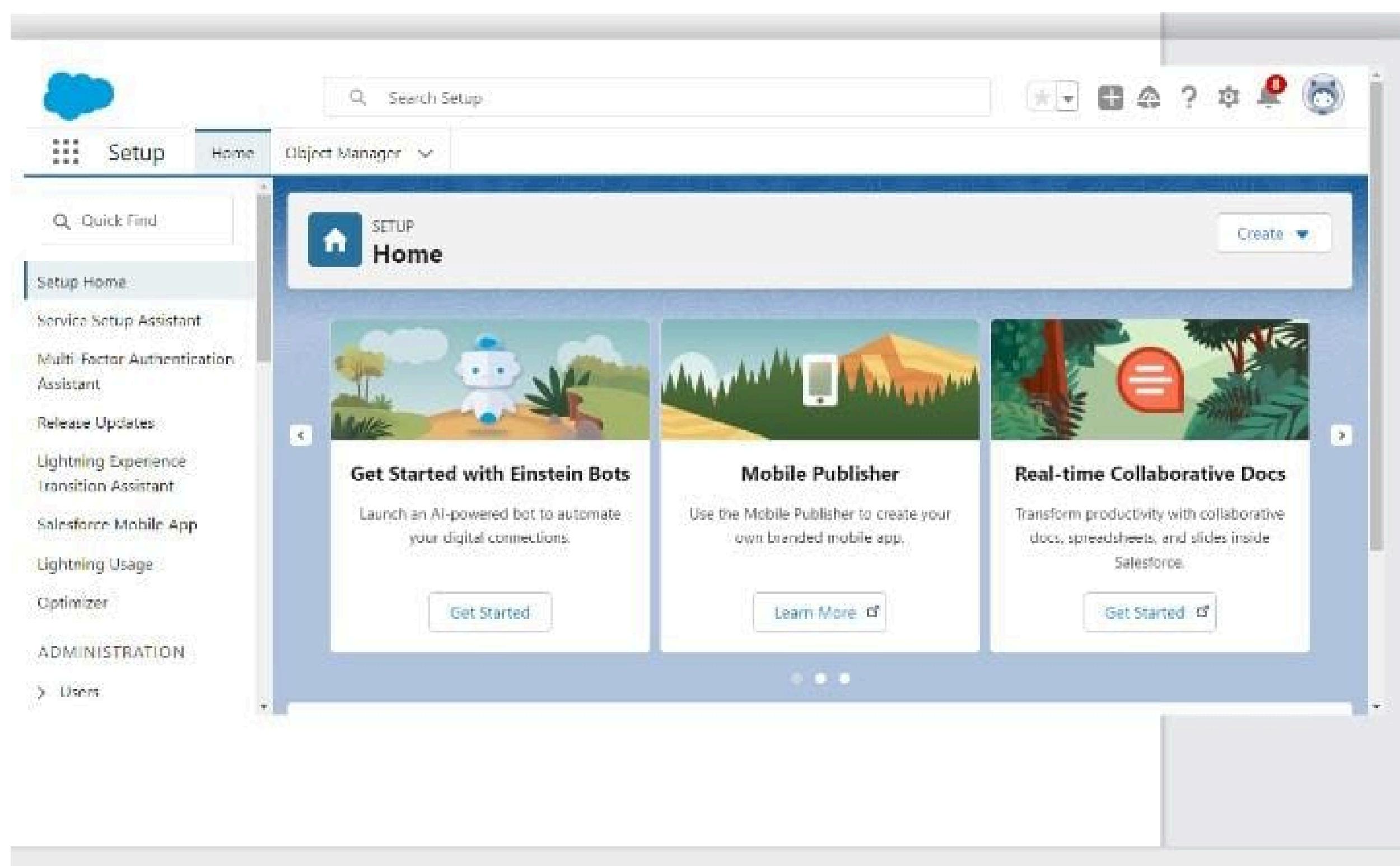
Confirm New Password
***** Match

Security Question
In what city were you born?

Answer
asdfghjkl

Change Password

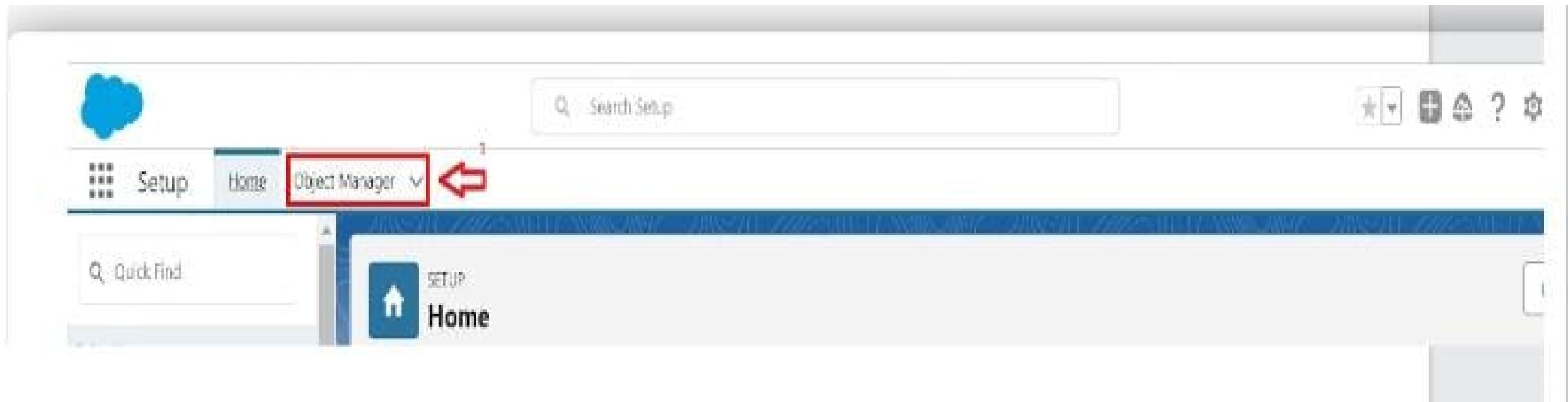
- Then you will redirect to your salesforce setup page.



Module:Object

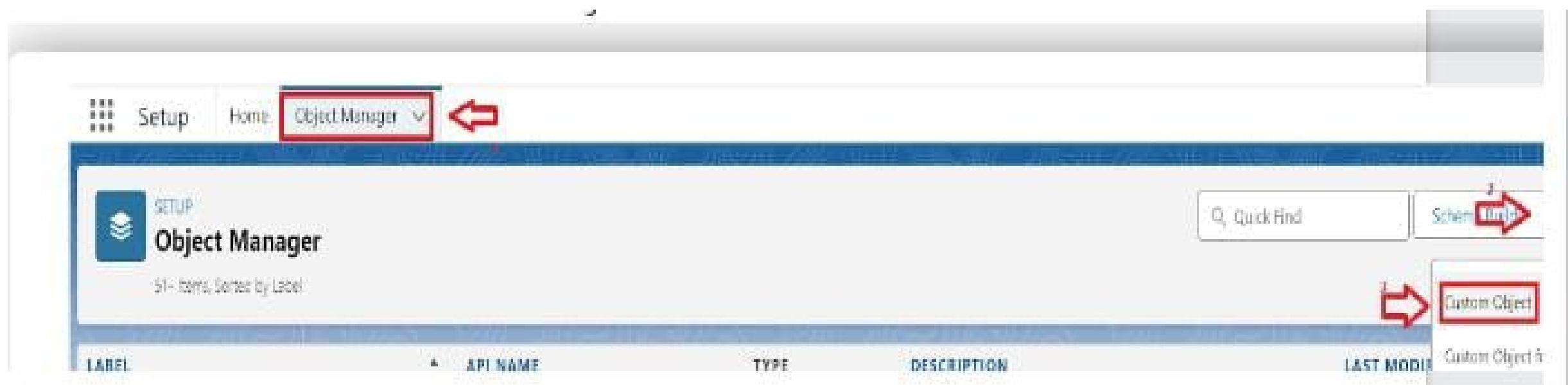
Activity 3:

- To Navigate to Setup page:



To create an object:

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



On Custom object defining page:

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

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and records.

Label: Example: Account

Plural Label: Example: Accounts

Share with external users:

The Object Name is used when referencing the object via the API.

Object Name: Example: Account

Description:

Content Sensitive Help Setting:

- Open the extended help in a new window (Help & Training window)
- Open a window using a Visualforce page

Content Name: None

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Record Name".

Record Name: Account Name

Data Type: Text

Optional Features

Allow Records 1

Allow Activities

Track Field History

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.

Allow Sharing

Allow Bulk API Access

Allow Streaming API Access

Deployment Status

In Development

Deployed 2

Search Status

When this setting is enabled, your users can find records of this object type when they search. Learn more.

Allow Search 3

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout

Launch New Custom Tab Wizard after saving this custom object

4

- Click on Save.

Create Venue Object

To create an object:

- From the setup page>>Click on Object Manager>> Click on Create >>Click on Custom Object.
- Enter the label name >>Venue

- Plural label name >>Venues
- Enter Record Name Label and Format
- Record Name >>Venue Name
- Data Type >>Text
- Click on Allow reports and Track Field History,Allow Activities.
- Allow search >> Save.

Create Drop-Off Point Object

To create an object:

- From the setup page >>Click on Object Manager>>Click on Create>> Click on Custom Object.
- Enter the label name >>Drop-Off Point
- Plural label name>> Drop-Off Points
- Enter Record Name Label and Format
- Record Name>> Drop-Off point Name
- Data Type>> Text
- Click on Allow reports and Track Field History,Allow Activities
- Allow search>> Save.

Create Task Object

To create an object:

- From the setup page>> Click on Object Manager>> Click on Create>> Click on Custom Object.
- Enter the label name>> Task
- Plural label name>> Tasks
- Enter Record Name Label and Format
- Record Name>> Task Name
- Data Type>> Text
- Click on Allow reports and Track Field History,Allow Activities

- Allow search>> Save.

Create Volunteer Object

To create an object:

- From the setup page>>Click on Object Manager>> Click on Create>> Click on Custom Object.
- Enter the label name>> Volunteer
- Plural label name>> Volunteers
- Enter Record Name Label and Format
- Record Name>> Volunteer Name
- Data Type>> Text
- Click on Allow reports and Track Field History, Allow Activities
- Allow search >>Save.

Create Execution Details Object

To create an object:

- From the setup page>> Click on Object Manager>> Click on Create>> Click on Custom Object.
- Enter the label name>> Execution Detail
- Plural label name>> Execution Details
- Enter Record Name Label and Format
- Record Name>> Execution Detail Name
- Data Type>> Text
- Click on Allow reports and Track Field History, Allow Activities
- Allow search>> Save.

Activity 4: Tabs

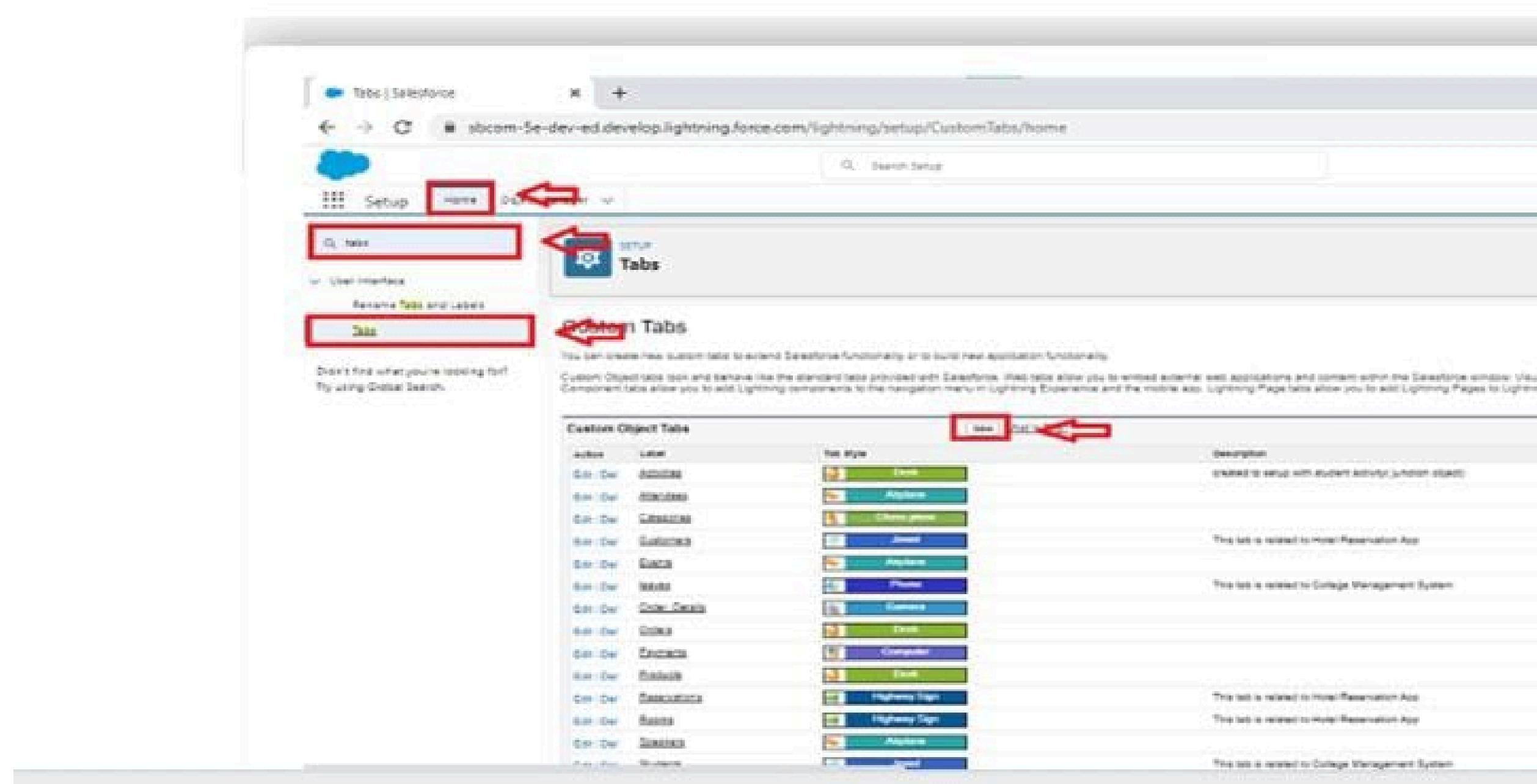
What is Tab:

A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Creating A Custom Tab

To create a Tab:(Venue)

- Go to setup page>> type Tabs in Quick Find bar>> click on tabs>> New (under custom object tab)



- Select Object(Venue)>> Select the tab style>> Next (Add to profiles page) keep it as default>> Next (Add to Custom App) uncheck the include tab .
- Make sure that the Append tab to users' existing personal customizations is checked.
- Click save

Creating Remaining Tabs

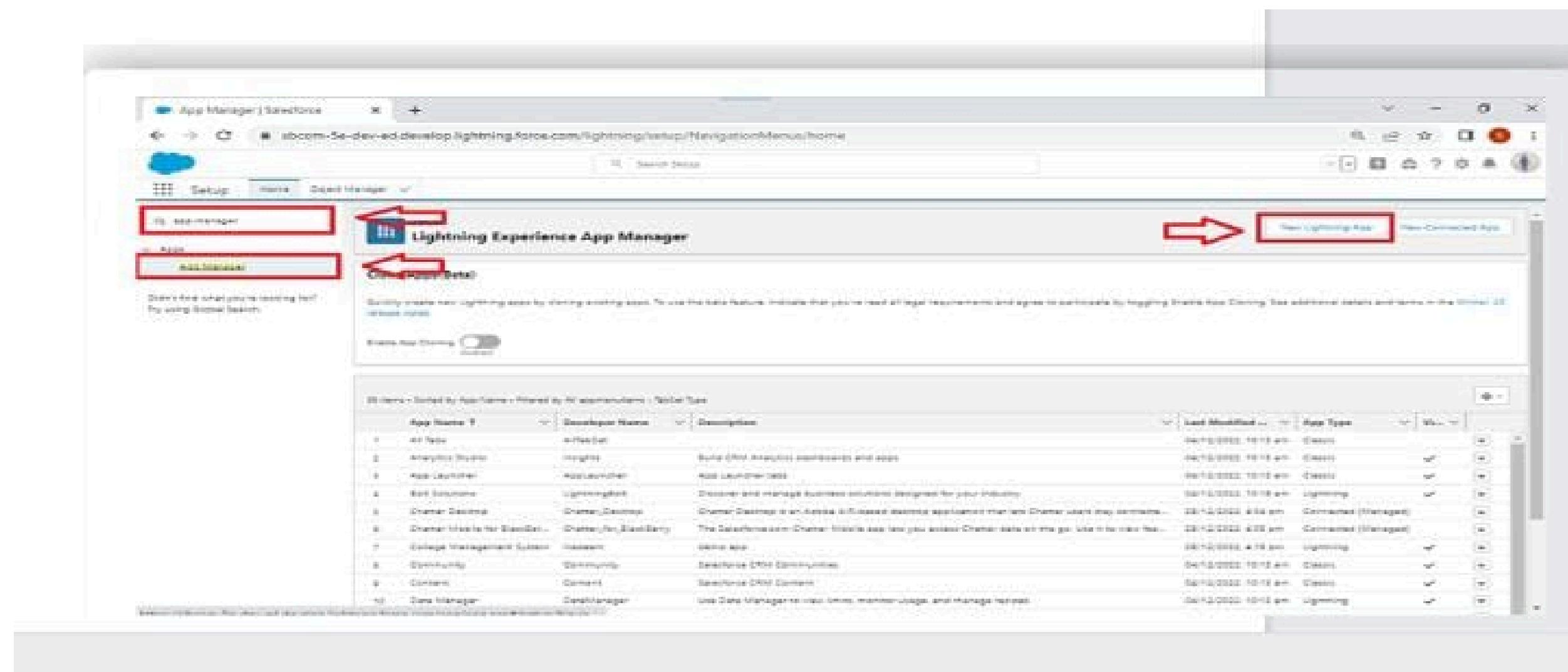
- Now create the Tabs for the remaining Objects, they are “Drop-Off Point, Task, Volunteer, Execution Details”.
- Follow the same steps as mentioned in Activity -I .

Activity 5: The Lightning App

Create A Lightning App

To create a lightning app page:

- Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.



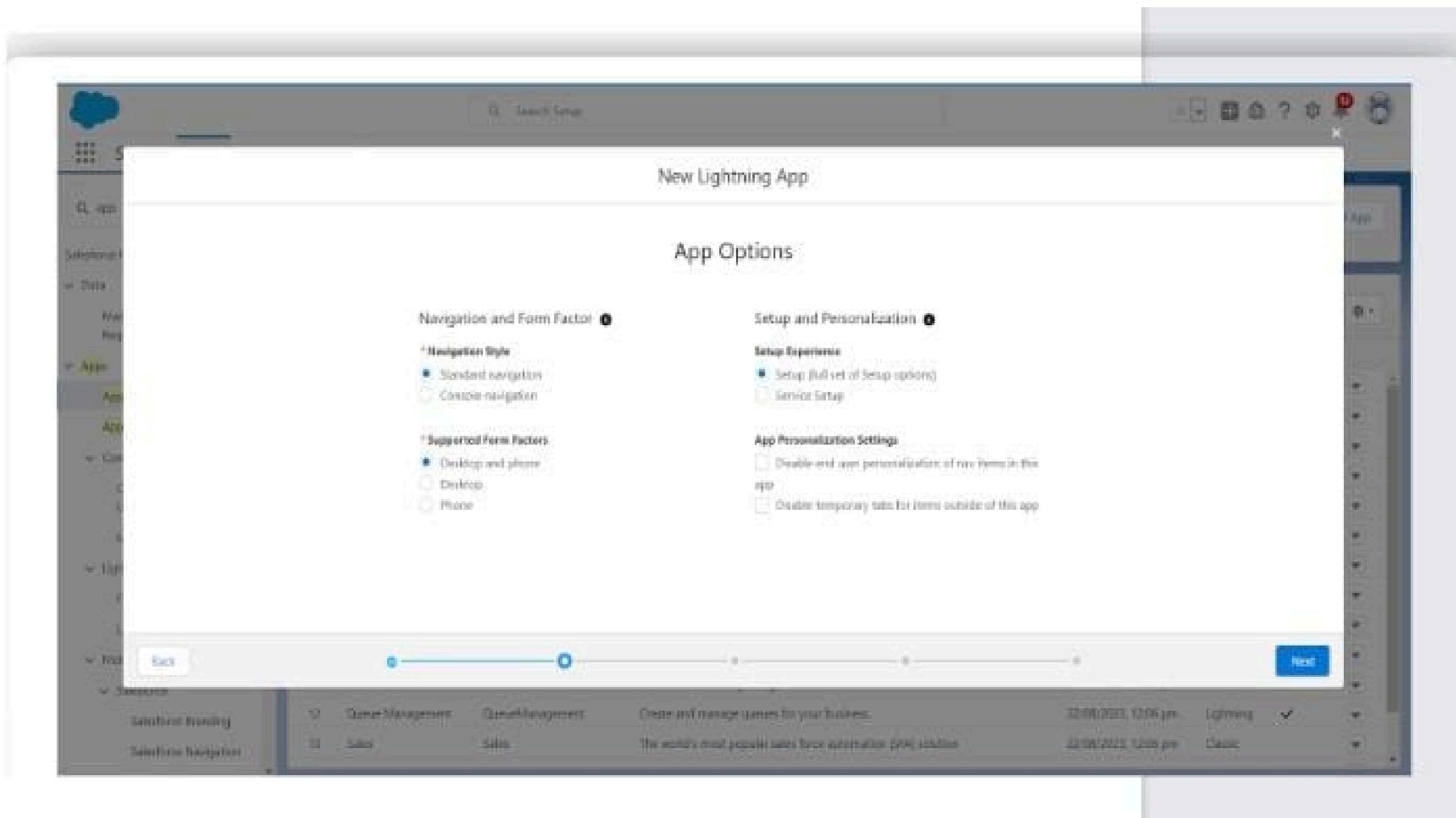
- Fill the app name in app details and branding as follow

App Name : FoodConnect

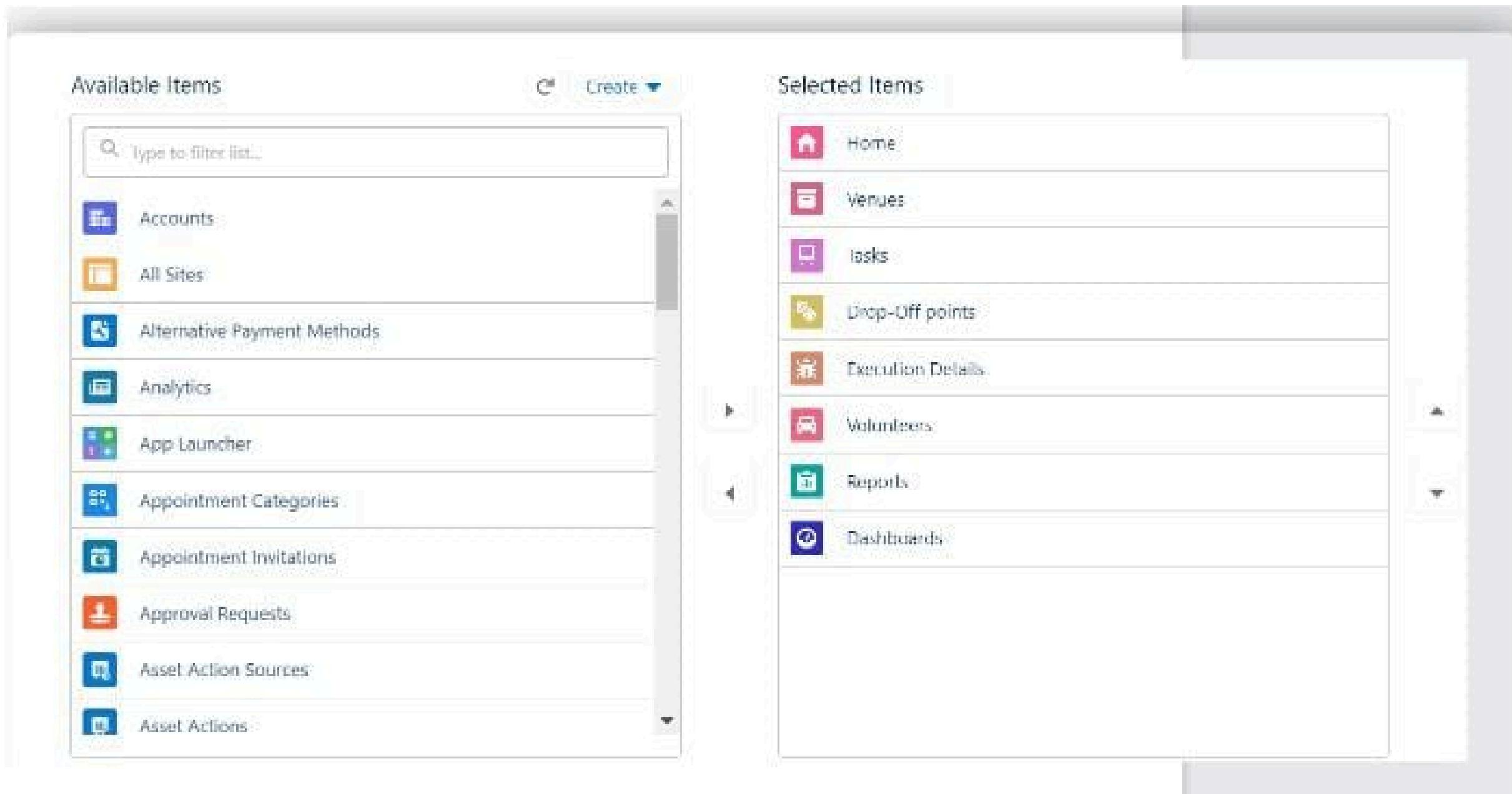
Developer Name : This will auto populated

Image : optional (if you want to give any image you can otherwise not mandatory) Primary color hex value : keep this default.

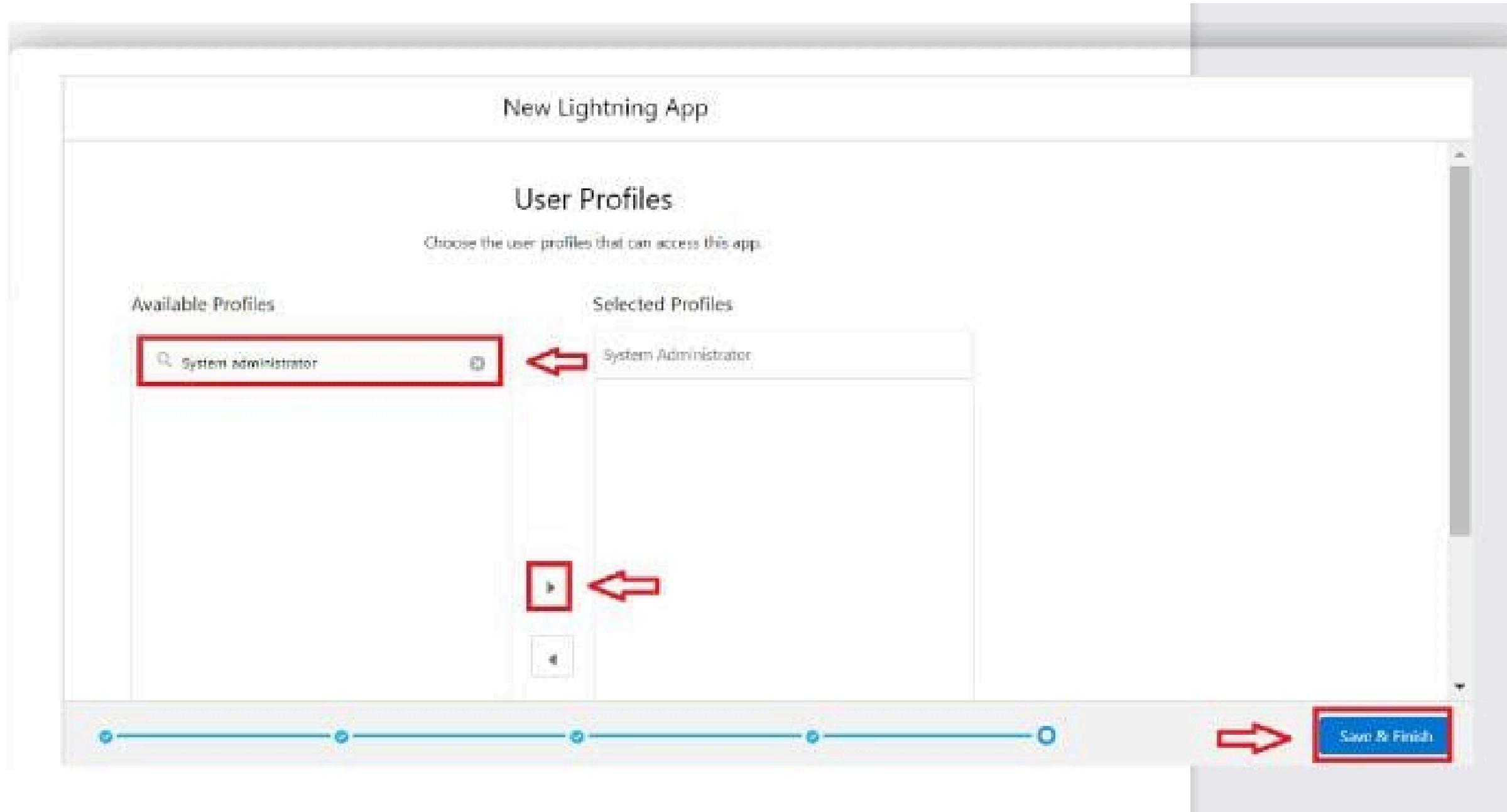
- Then click Next >> (App option page) Set Navigation Style as Standard Navigation >> Next.



- (Utility Items) keep it as default >> Next
- To Add Navigation Items:



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



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

Activity 6: Fields

Creation Of Relationship Fields in Objects

Creation of Lookup Relationship Field on Volunteer Object:

- Go to setup >> click on Object Manager >> type object name (Volunteer) in the search bar >> click on the object.



- Now click on “Fields&Relationships” >> New
- Select Master Detail relationship
- Select the related object “Drop-Off point” and click next.



- Field Name: Drop_Off_point
- Field label: Auto generated
- Next>> Next>> Save.

Creation of Master Detail Relationship Field on Execution Details Object:

- Go to setup>> click on Object Manager>> type object name (Execution Details) in the search bar>> click on the object.
- Now click on “Fields&Relationships”>> New
- Select Master Detail relationship
- Select the related object “Volunteer” and click next.
- Field Name : Volunteer
- Field label : Auto generated
- Next>> Next>> Save.
- Creation of Master Detail Relationship Field on Execution Details Object
- Go to setup >> click on Object Manager >> type object name(Execution Details) in the search bar>> click on the object.
- Now click on “Fields&Relationships”>> New
- Select Master Detail relationship
- Select the related object “Task” and click next.
- Field Name : Task
- Field label : Auto generated
- Next>> Next>> Save.

Creation of Lookup Relationship Field on Drop-Off Point Object

- Go to setup >> click on Object Manager >> type object name(Drop-Off Point) in the search bar>> click on the object.
- Now click on “Fields&Relationships”>> New
- Select Lookup relationship

- Select the related object “Venue” and click next.
- Field Name : Venue
- Field label : Venue_c
- Next>>Next>>Save.

Creation of Lookup Relationship Field on Task Object

- Go to setup>> click on Object Manager >> type object name(Task) in the search bar>> click on the object.
- Now click on “Fields&Relationships”>> New
- Select Lookup relationship
- Select the related object “Venue” and click next.
- Field Name : Sponsored By
- Field label : Auto generated
- Next>>Next>> Save.
- Creation of Lookup Relationship Field on Task Object
- Go to setup>> click on Object Manager >> type object name(Task) in the search bar>> click on the object.
- Now click on “Fields&Relationships”>> New
- Select Lookup relationship
- Select the related object “Drop-Off point” and click next.
- Field Name : Drop-Off point
- Field label : Auto generated
- Next>>Next>>Save.

Creation Of Fields for The Venue Object

- Go to setup>> click on Object Manager>> type object name (Venue) in search bar>> click on the object.
- Now click on “Fields&Relationships”>> New
- Select Data type as a “Email” and Click on Next
- Fill the Above as following

- Field Label: Contact Email
- Field Name: Contact Email
- Click on required check box
- Click on Next>> Next>> Save and new.

To create another fields in an object:

- Go to setup>> click on Object Manager>> type object name (Venue) in search bar>> click on the object.
- Now click on “Fields&Relationships”>>New
- Select Data type as a “Phone” and Click on Next
- Fill the Above as following:
- Field Label : Contact Phone
- Field Name : Contact Phone
- Click on required check box
- Click on Next>> Next>> Save and new.

To create another fields in an object:

- Go to setup >> click on Object Manager >> type object name(Venue) in search bar>>click on the object.
- Now click on “Fields&Relationships”>> New
- Select Data type as a “Geolocation” and Click on Next
- Fill the Above as following:
- Field Label : Location
- Decimal Places : 4
- Field Name : Location
- Description : Enter the Geolocation of your Venue
- Click on Next>> Next>> Save and new.

To create another fields in an object:

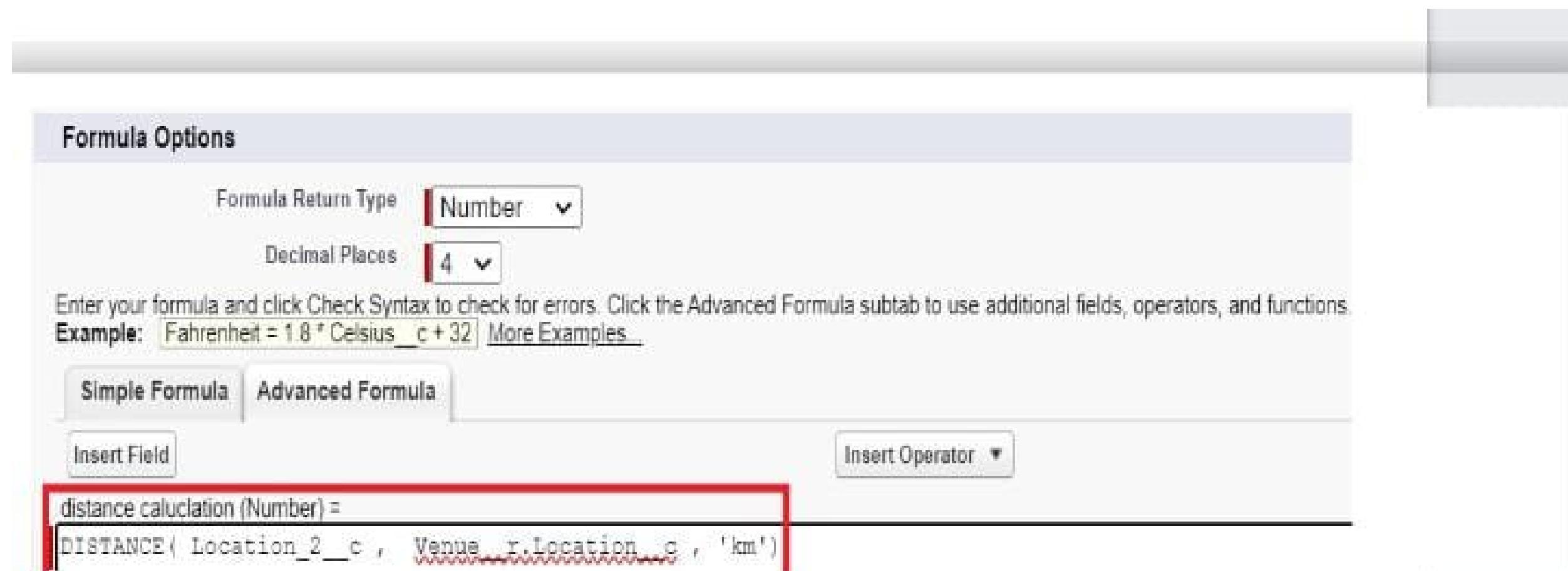
- Go to setup >> click on Object Manager >> type object name(Venue) in search bar>> click on the object.
- Now click on “Fields&Relationships”>> New
- Select Data type as a “Long Text Area” and Click on Next
- Fill the Above as following:
- Field Label : Venue Location
- Field Name : Venue_Location
- Click on Next>> Next>> Save and new.

Creation Of Fields For The Drop-Off Point Object

- Go to setup >> click on Object Manager >> type object name(Drop-Off point) in search bar>> click on the object.
- Now click on “Fields&Relationships”>> New
- Select Data type as a “Geolocation” and Click on Next
- Fill the Above as following:
- Field Label : Location 2
- Field Name : gets auto generated
- Description : Enter the Geolocation of the Drop off Point
- Geolocation Options : select Decimal
- Decimal Places : 4
- Click on Next>> Next>> Save and new.

To create another fields in an object:

- Go to setup >> click on Object Manager >> type object name(Drop-Off point) in search bar>> click on the object.
- Now click on “Fields&Relationships”>> New
- Select Data type as a “Formula” and Click on Next
- Fill the Above as following:
- Field Label : distance calculation
- Field Name : distance_calculation
- Formula Return Type : Number
- Formula Options : DISTANCE(Location_2__c , Venue__r.Location__c , 'km')
- Click on Next>> Next>> Save and new.



To create another fields in an object:

- Go to setup>> click on Object Manager>>type object name (Drop-Off point) in search bar>> click on the object.
- Now click on “Fields&Relationships”>>New
- Select Data type as a “Picklist” and Click on Next
- Fill the Above as following:
- Field Label : State
- Field Name : State

- Enter values, with each value separated by a new line :
- Andhra Pradesh
- Arunachal Pradesh
- Assam
- Bihar
- Chhattisgarh
- Goa
- Gujarat
- Haryana
- Himachal Pradesh
- Jharkhand
- Karnataka
- Kerala
- Maharashtra
- Madhya Pradesh
- Manipur
- Meghalaya
- Mizoram
- Nagaland
- Odisha
- Punjab
- Rajasthan
- Sikkim
- Tamil Nadu
- Tripura
- Telangana
- Uttar Pradesh
- Uttarakhand
- West Bengal
- Andaman&Nicobar (UT)
- Chandigarh (UT)
- Dadra&Nagar Haveli and Daman&Diu (UT)
- Delhi [National Capital Territory (NCT)]

- Jammu&Kashmir (UT)
- Ladakh (UT)
- Lakshadweep (UT)
- Puducherry (UT)
- Click on required check box
- Click on Next>> Next>> Save and new.

To create another fields in an object:

- Go to setup >> click on Object Manager >> type object name(Task) in search bar>> click on the object.
- Now click on “Fields&Relationships”>> New
- Select Data type as a “Number” and Click on Next
- Fill the Above as following:
- Field Label : Distance
- Field Name : Distance
- Length : 14
- Decimal Places : 4
- Click on required check box
- Click on Next>> Next>> Save and new.

Creation Of Fields For The Task Object

1. Go to setup>> click on Object Manager >> type object name(Task) in search bar>> click on the object.
2. Now click on “Fields&Relationships”>> New
3. Select Data type as a “Auto Number” and Click on Next
4. Fill the Above as following:
 - Field Label : Task ID

- Display Format : TASK-{0}
- Starting Number : 1
- Field Name : gets auto generated
- Click on required check box
- Click on Next>> Next>>Save and new.

To create another fields in an object:

- Go to setup >> click on Object Manager >> type object name(Task) in search bar>> click on the object.
- Now click on “Fields&Relationships”>> New
- Select Data type as a “Date” and Click on Next
- Fill the Above as following:
- Field Label : Date
- Field Name : Date
- Click on required check box
- Click on Next>> Next>> Save and new.

To create another fields in an object:

- Go to setup >> click on Object Manager >> type object name(Task) in search bar>> click on the object.
- Now click on “Fields&Relationships”>> New
- Select Data type as a “Picklist (Multi-Select)” and Click on Next
- Fill the Above as following:
- Field Label : Food Category
- Field Name : Food Category
- Enter values, with each value separated by a new line :
- Veg
- Non-Veg
- Salad

- Snack
- Click on required check box
- Click on Next>> Next>> Save and new.

To create another fields in an object:

- Go to setup >> click on Object Manager >> type object name(Task) in search bar>> click on the object.
- Now click on “Fields&Relationships”>> New
- Select Data type as a “Number” and Click on Next
- Fill the Above as following:
- Field Label : Number of People Served
- Field Name : Number_of_People_Served
- Click on required check box
- Click on Next>> Next>> Save and new.

To create another fields in an object:

- Go to setup >> click on Object Manager >> type object name(Task) in search bar>> click on the object.
- Now click on “Fields&Relationships”>> New
- Select Data type as a “Text” and Click on Next
- Fill the Above as following:
- Field Label : Name of the Person
- Field Name : Name_of_the_Person
- Click on Next>> Next>>Save and new.

To create another fields in an object:

- Go to setup>> click on Object Manager >> type object name(Task) in search bar>> click on the object.
- Now click on “Fields&Relationships”>> New
- Select Data type as a “Phone” and Click on Next

- Fill the Above as following:
- Field Label : Phone
- Field Name : Phone
- Click on Next>> Next>> Save and new.

To create another fields in an object:

- Go to setup >> click on Object Manager >> type object name(Task) in search bar>> click on the object
- Now click on “Fields&Relationships”>> New
- Select Data type as a “Pick List” and Click on Next
- Fill the Above as following:
- Field Label : Rating
- Field Name : Rating
- Enter values, with each value separated by a new line :
- 1
- 2
- 3
- 4
- 5
- Click on Next>> Next>> Save and new.

To create another fields in an object:

- Go to setup >> click on Object Manager >> type object name(Task) in search bar>> click on the object.
- Now click on “Fields&Relationships”>> New
- Select Data type as a “Long Text Area” and Click on Next
- Fill the Above as following:
- Field Label: Feedback
- Field Name: Feedback
- Click on Next>> Next>> Save and new.

Creation Of Fields for The Volunteer Object

- Go to setup>> click on Object Manager>> type object name (Volunteer) in search bar >>click on the object.
- Now click on “Fields&Relationships”>> New
- Select Data type as a “Auto Number” and Click on Next
- Fill the Above as following:
- Field Label : Volunteer ID
- Field Name : gets auto generated
- Click on required check box
- Click on Next>> Next>> Save and new.
- Click on Next>> Next>>Save and new.

To create another fields in an object:

- Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar>> click on the object.
- Now click on “Fields&Relationships” >>New
- Select Data type as a “Picklist” and Click on Next
- Fill the Above as following:
- Field Label : Gender
- Field Name : Gender
- Enter values, with each value separated by a new line :
- Female
- Male
- Click on Next>>Next >>Save and new.

To create another fields in an object:

- Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar>> click on the object.

- Now click on “Fields&Relationships”>> New
- Select Data type as a “Date” and Click on Next
- Fill the Above as following:
- Field Label : Available On
- Field Name : Available On
- Click on required check box
- Click on Next>> Next>> Save and new.

To create another fields in an object:

- Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar>> click on the object.
- Now click on “Fields&Relationships”>> New
- Select Data type as a “Number” and Click on Next
- Fill the Above as following:
- Field Label : Age
- Field Name : Age
- Click on required check box
- Click on Next>> Next>> Save and new.

To create another fields in an object:

- Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar>> click on the object.
- Now click on “Fields&Relationships”>> New
- Select Data type as a “Email” and Click on Next
- Fill the Above as following:
- Field Label : Email
- Field Name : Email
- Click on required check box
- Click on Next>> Next>> Save and new.

To create another fields in an object:

- Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar>> click on the object.
- Now click on “Fields&Relationships”>> New
- Select Data type as a “Number” and Click on Next
- Fill the Above as following:
- Field Label : Contact Number
- Field Name : Contact_Number
- Click on required check box
- Click on Next>> Next>> Save and new.

To create another fields in an object:

- Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar>> click on the object.
- Now click on “Fields&Relationships”>> New
- Select Data type as a “Text Area (Long)” and Click on Next
- Fill the Above as following:
- Field Label : Address
- Field Name : Address
- Click on Next>> Next>> Save and new.

To create another fields in an object:

- Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar>> click on the object.
- Now click on “Fields&Relationships”>>New
- Select Data type as a “Date” and Click on Next
- Fill the Above as following:
- Field Label : Date of Birth

- Field Name : Date_of_Birth
- Click on Next>> Next>> Save and new.

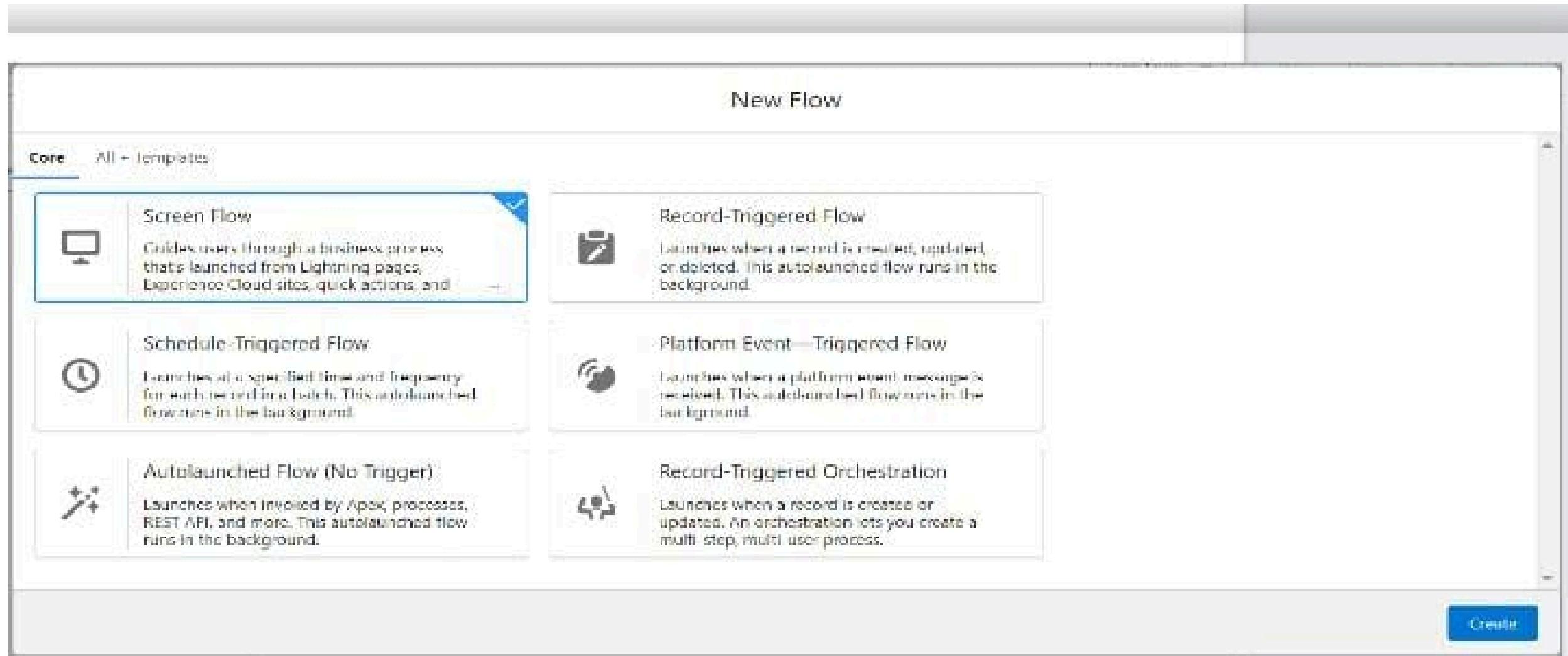
Creation Of Fields For The Execution Details Object

- Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar>> click on the object.
- Now click on “Fields&Relationships”>> New
- Select Data type as a “Auto Number” and Click on Next
- Fill the Above as following:
- Field Label : Execution ID
- Field Name : gets auto generated
- Click on required check box
- Click on Next>> Next>> Save and new.

Activity 7: FLOWS

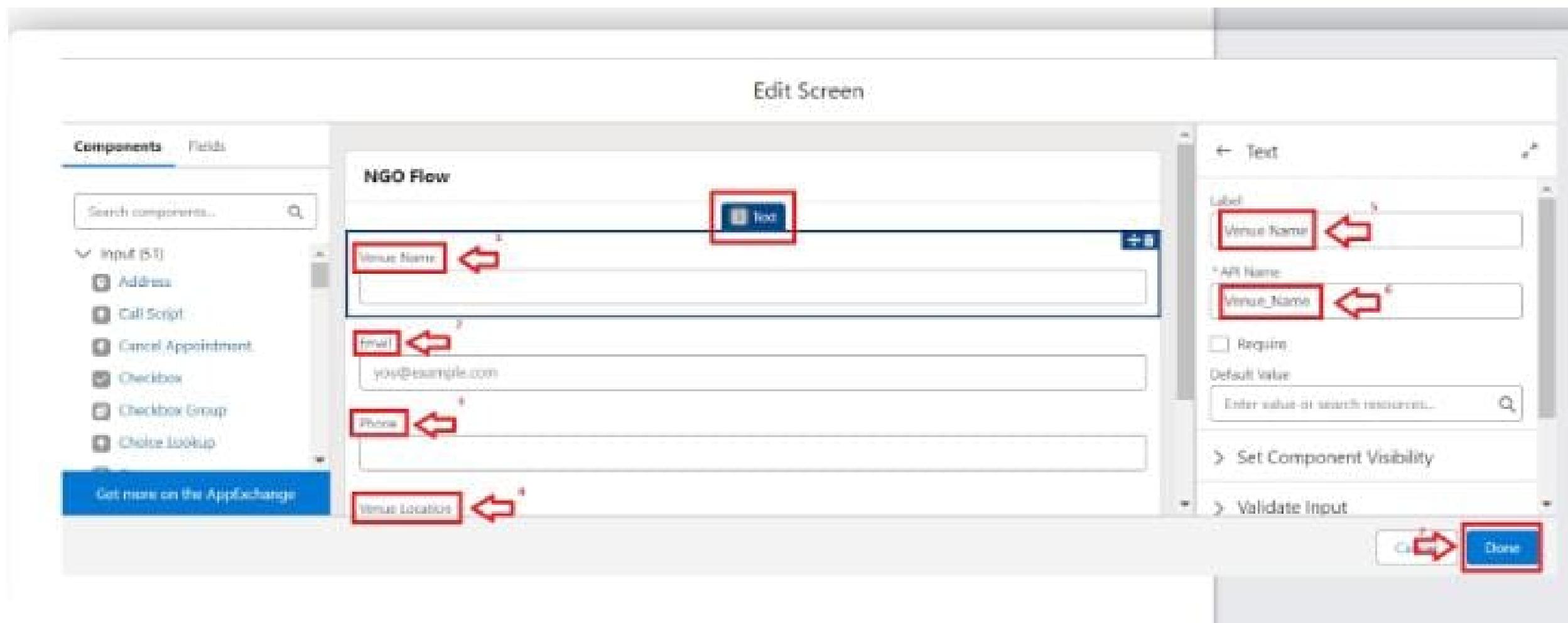
Create Flow To Create A Record In Venue Object

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



- Click on the ‘+’ icon in between start and end, and click on screen element.
- Under the Screen Properties:
- Label : Venue Details
- API Name : Venue_Details
- Now lets add components in this flow. Click on Text Component and name it as:
- Label : Venue Name
- API Name : Venue_Name
- Click on Email Component and name it as:
- Label : Email
- API Name : Contact_Email
- Click on Phone Component and name it as:
- Label : Phone
- API Name : Contact_Phone
- Click on Text Component and name it as:
- Label : Venue Location
- API Name : Venue_Location
- Click on Number Component and name it as:
- Label : Latitude
- API Name : Latitude

- Click on Number Component and name it as:
- Label : longitude
- API Name : longitude
- Next click on Done. This would look below



- Click on the ‘+’ icon in between Venue details and end, and click on create record element.
- 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}
- This would look like:

Create a Record of This Object

* Object
Venue

Set Field Values for the Venue

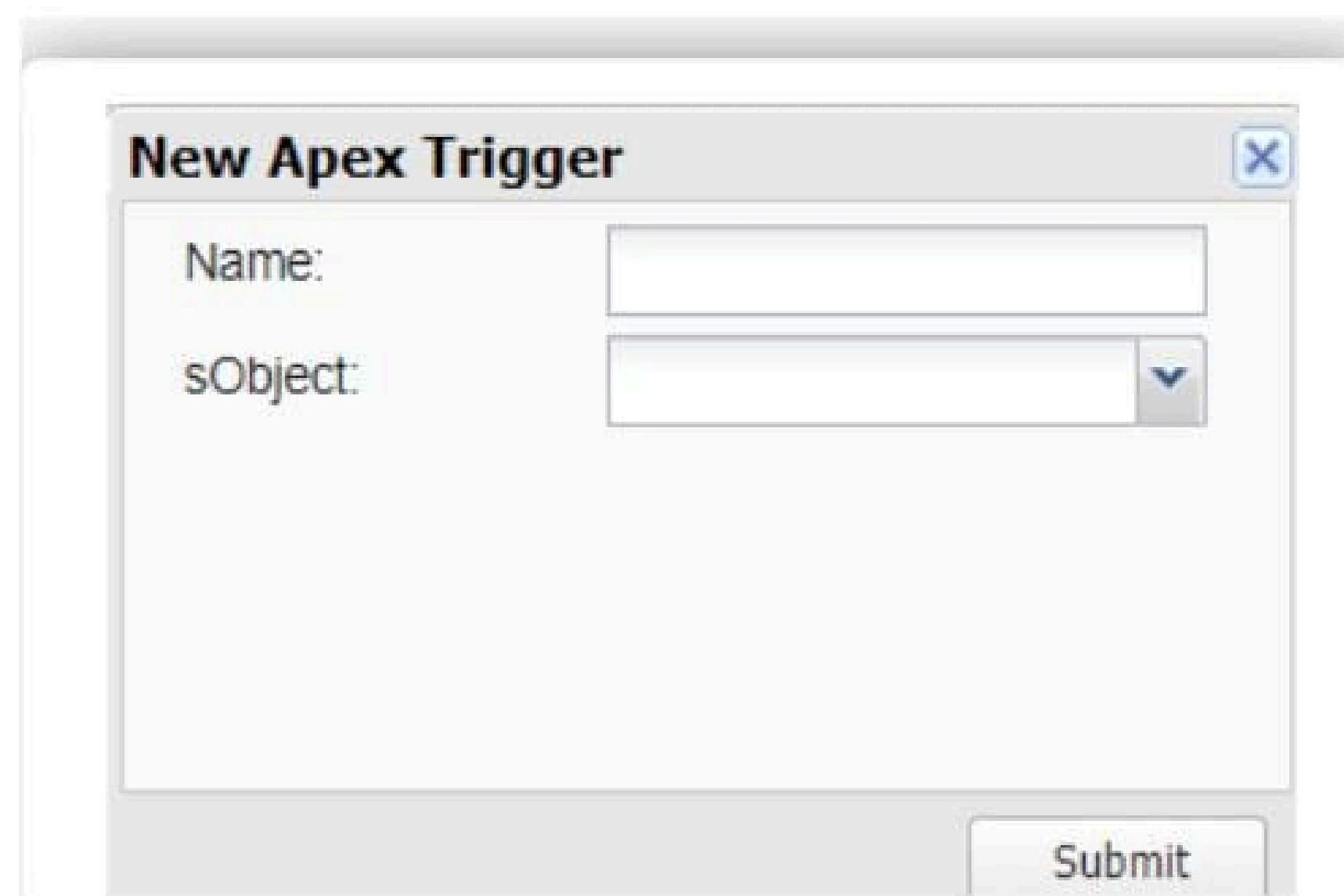
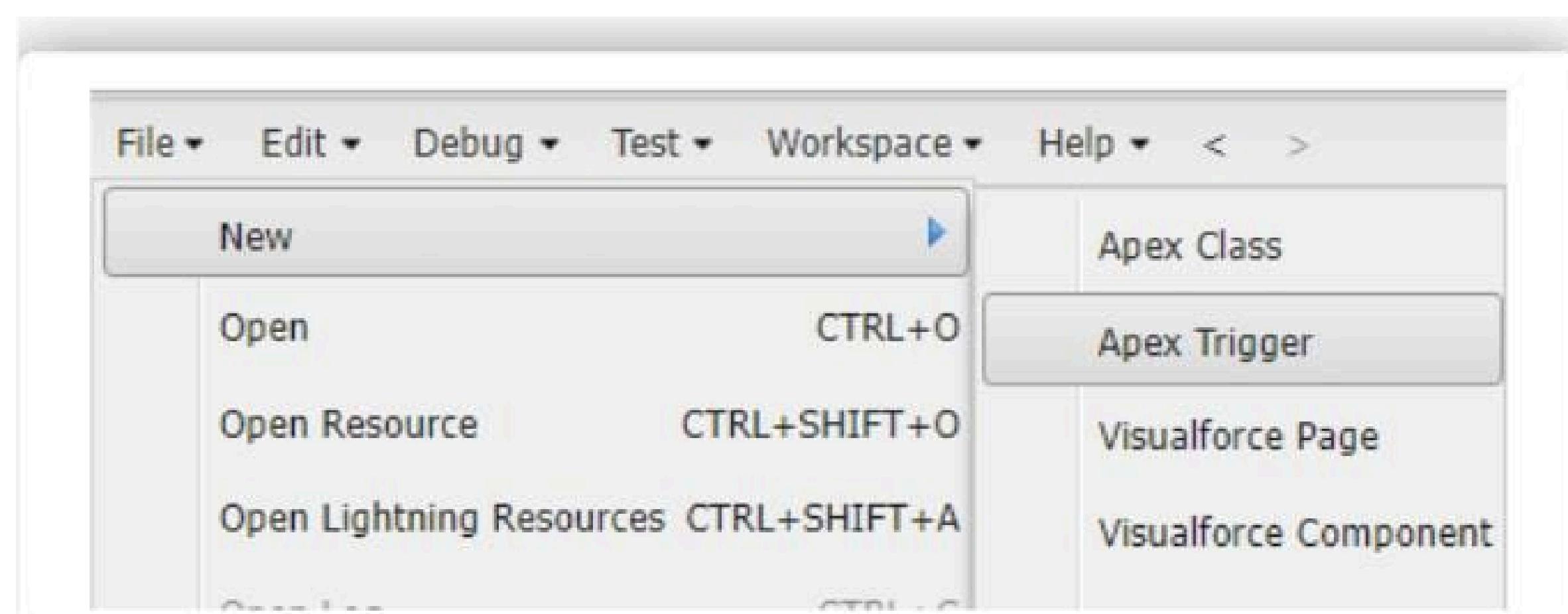
Field Contact_Email_c	Value A_a Contact_Email > Value X	✖
Field Contact_Phone_c	Value A_a Contact_Phone > Value X	✖
Field Name	Value A_a Venue_Name X	✖
Field Venue_Location_c	Value A_a location X	✖

- Click on Save as:
- Flow Label : Venue Form
- Flow API Name : Venue_Form

Activity 8: Trigger

Create A Trigger

- Log into the trailhead account, navigate to the gear icon in the top right corner.
- Click on developer console and you will be navigated to a new console window.
- Click on the File menu in the toolbar, and click on new>> Trigger.
- Enter the trigger name and the object to be triggered.



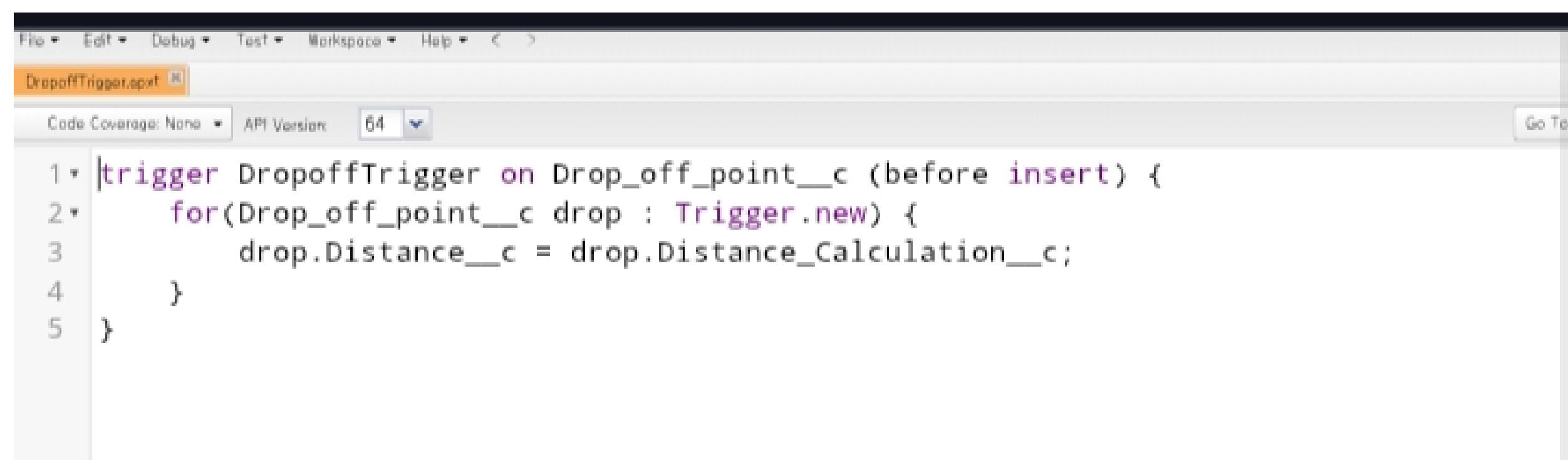
- Enter Name : DropOffTrigger
- sObject: Drop-Off Point
- Click on Submit.

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;
    }
}
```



```
trigger DropoffTrigger on Drop_off_point_c (before insert) {
    for(Drop_off_point_c drop : Trigger.new) {
        drop.Distance__c = drop.Distance_Calculation__c;
    }
}
```

Activity 9: Profiles

- Go to setup page>> type Profiles in Quick Find bar>>click on Profiles>> click on ‘S’
- Click on Clone beside Standard Platform User.
- Under Clone Profile:
- Profile Name: NGOs Profile

- Then click on Save

Activity 10: Creation of Users

In our Project we consider them as NGO's

Creation Of User1

- Go to setup page>>type users in Quick Find bar>> click on users>> New user.
- In General Information give details as: (Note: create users as per your wish NGO's)
- First Name: Iksha Foundation
- Last Name: Iksha_Foundation
- Alias : iiksh
- Email : Give Your Email
- Username : ikshafoundation@sb.com (give the username different)
- Nickname : Auto Populated
- User License : Salesforce Platform
- Profile : NGOs Profile
- Active : Check

General Information

First Name	Iksha Foundation	Role	<None Specified>
Last Name	Iksha_Foundation	User License	Salesforce Platform
Alias	iiksh	Profile	NGOs Profile
Email	bhargavipaila1023@gmail.com	Active	<input checked="" type="checkbox"/>
Username	ikshafoundation@sb.com	Marketing User	<input type="checkbox"/>
Nickname	User1711437164226559933	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>

- Click on Save

Creation Of User2, User3

- Create another Two Users by following steps in Activity - I with similar User License and Profile.
- Give Different First Name, Last Name based on Different NGO's.

<input type="checkbox"/> Edit Login <u>Iksha Foundation, Iksha Foundation</u>	<u>iksh</u>	<u>ikshafoundation@sb.com</u>	<input checked="" type="checkbox"/> NGOs Profile
<input type="checkbox"/> Edit Login <u>NSS, NSS</u>	<u>nss</u>	<u>nss@sb.com</u>	<input checked="" type="checkbox"/> NGOs Profile
<input type="checkbox"/> Edit Login <u>Street_Cause, Street Cause</u>	<u>sstre</u>	<u>streetcause@sb.com</u>	<input checked="" type="checkbox"/> NGOs Profile

Activity II: Public Groups

Creation Of Public Group 1

- Go to setup page >> type Public Groups in Quick Find bar >> click on Public Groups >> click on New.
- Under Group Information:
- Label: Iksha
- Group Name: Iksha
- Grant Access Using Hierarchies: Check
- In Search, Select Users.
- In Selected Members Add Iksha Foundation and System Administrator

Creation Of Public Group 2

- By Following Steps in Activity I, Create other two Public Groups for other two users.
- After Saving this would look like this.

Action	Label	Group Name	Created By	Created Date
Edit Del	<u>Iksha</u>	<u>Iksha</u>	<u>Bhargavi_Paila</u>	26/03/2024, 2:27 pm
Edit Del	<u>NSS</u>	<u>NSS</u>	<u>Bhargavi_Paila</u>	26/03/2024, 2:27 pm
Edit Del	<u>Street_Cause</u>	<u>Street_Cause</u>	<u>Bhargavi_Paila</u>	26/03/2024, 2:26 pm

Activity 12: Report Types

Creation Of Report Types

- Go to setup page >> type Report Types in Quick Find bar >> click on Report Types >> click on Continue >> Click on New Custom Report Type.
- In Define the Custom Report Type:
- Primary Object: Select Venues
- Report Type Label: Venue with DropOff with Volunteer
- Report Type Name: Venue_with_DropOff_with_Volunteer
- Description: Venue with DropOff with Volunteer
- Store in Category: Select Other Reports
- Deployment Status: Deployed
- Click on Next
- Near Click to relate another Object Select Drop-Off Points.
- And also select 'A' records may or may not have related 'B' records.
- Now again Near Click to relate another Object Select Volunteers.
- Now click on Save.

Activity 13: Reports

- Creation Of Report On Venue With DropOff With Volunteer
- 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.

☰ Outline ⚙ Filters 2

Groups ✖

GROUP ROWS

Add group... 🔍

Volunteer Name ✖

GROUP COLUMNS

Add group... 🔍

Columns ▼

Add column... 🔍

Venue Name ✖

Drop-Off point Name ✖

Distance ✖

✓ Previewing a limited number of records. Run the report to see everything.

Volunteer Name ↑ ↓	Venue Name ↑ ↓	Drop-Off point Name ↓	Distance ↓
- (4)	La Royale Banquet Hall.	Shapur	5.1161
	La Royale Banquet Hall.	Jeedimetla	6,902.9995
	Paradise Garden Function Hall	Suraram Village	28.2332
	Ujwala Grand	-	-
Subtotal			
Total (4)			6,936.3488

- 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.
 - Then click on Start Report.
 - In GROUP ROWS : Volunteer ID
 - In Columns : Add Volunteer : Volunteer Name, Task : Task Name, Execution Detail : Execution Detail Name, Volunteer: Owner Name, Task: Date, Task : Rating.

The screenshot shows the Zoho Report Builder interface. At the top, there's a toolbar with buttons for Report, Save & Run, Save, Close, and Run. Below the toolbar, the report title is "Volunteer Task" and the subtitle is "Volunteers with Execution Details and Tasks". On the left, there's a sidebar titled "Fields" with sections for "Outline" and "Filters". Under "Outline", there are "GROUP ROWS" and "GROUP COLUMNS" sections with "Add group..." buttons. Under "Columns", there are "Add column..." buttons followed by a list of columns: Volunteer: Volunteer Name, Task: Task Name, Execution Detail: Execution Detail Name, Volunteer: Owner Name, Task: Date, and Task: Rating. The main area shows a preview of the report data. The data includes rows for Charan and Bhavika, with subtotals and a total row. The columns correspond to the ones selected in the outline and columns sections. At the bottom of the preview area, there are checkboxes for Row Counts, Detail Rows, Subtotals, and Grand Total.

Now click on Save&Run.

- Give Label as :
- Report Name : Volunteer Task
- Report Unique Name : Auto Populated
- Click on Select Folder and select Custom Report, then click on Save.

Activity 14: Dashboards

- Adding Venue And Drop Off Point Report To The Dashboard
- Go to the app(FoodConnect) >> click on the Dashboards tab.
- Click on New Folder.
- Folder Label : Custom Dashboards
- Folder Unique Name : Auto Populated
- Open Custom Dashboards and click on New Dashboards
- Name : Organization Details
- Click on Widget and select Chart or Table

- In Select Report : Select venue and Drop Off point Report.
- Then click on select
- In Add Component:
- Display As : Select Lightning Table
- Component Theme : Select Dark (Optional)

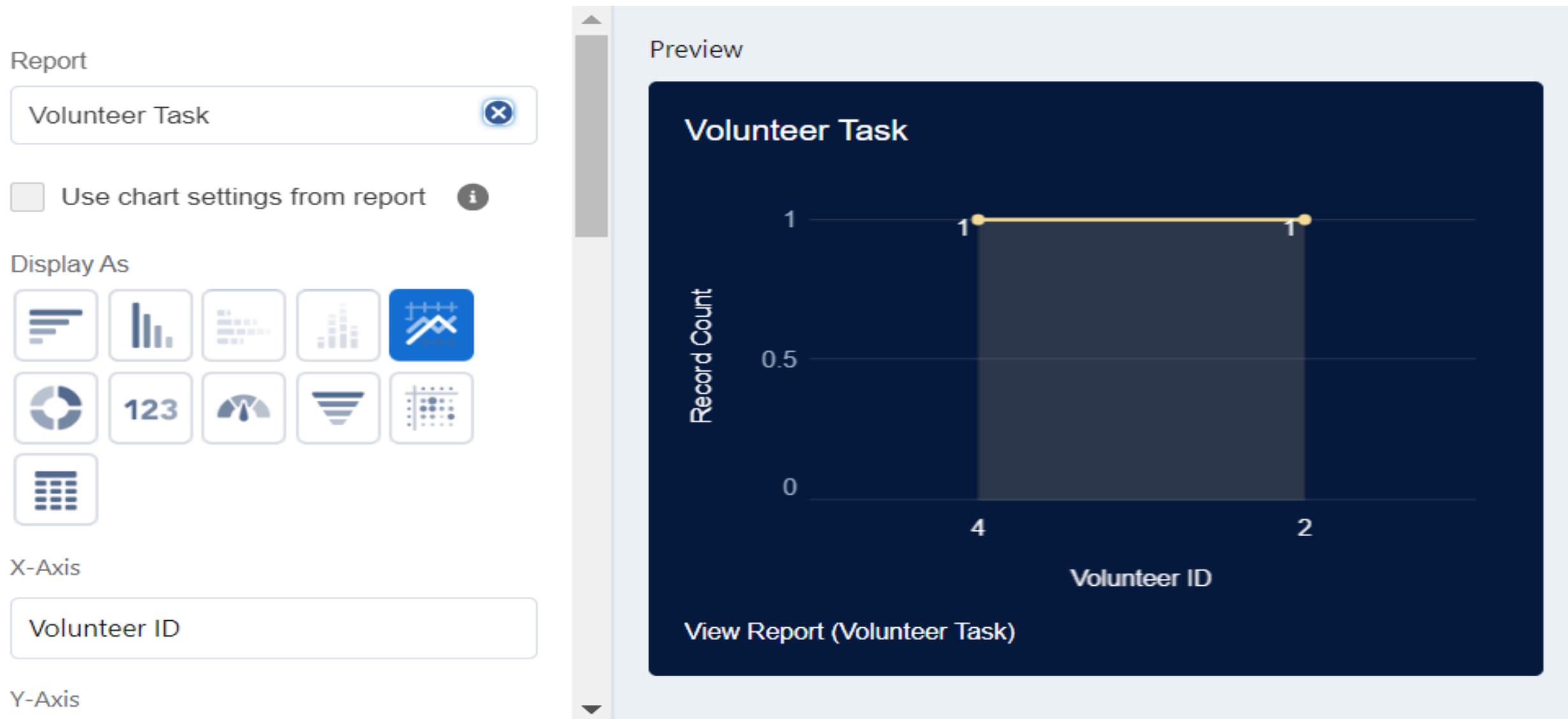
The screenshot shows the Report Builder interface. On the left, the 'Report' section is visible with the title 'venue and Drop Off point'. Below it are sections for 'Display As' (with various chart and table icons), 'Groups' (with an 'Add group...' button), and 'Columns' (with a search icon). On the right, the 'Preview' section displays the report results in a dark-themed table:

Venue Name ↑	Drop-Off point Name	Distance
La Royale Banquet Hall.	Shapur	5.1161
La Royale Banquet Hall.	Jeedimetla	6.9030k
Paradise Garden Function Hall	Suraram Village	28.2332
Ujwala Grand	-	-

At the bottom of the preview, there is a link: 'View Report (venue and Drop Off point)'.

- Now click on save.

- Adding Volunteer Task Report To The Dashboard
- Click on Widget and select Chart or Table
- In Select Report : Select Volunteer Task Report.
- Then click on select
- In Add Component:
- Display As : Select Line Chart
- Component Theme : Select Dark (Optional)



- Now click on save.

Adding A Picture To The Dashboard:

(Note : To upload an image into the Dashboard, we have to first download an image from google or other sources into your system)

- Click on Widget and select Image. Then click on Browse Files.
- Then Select the Picture you want to upload in this Dashboard.
- Then click on Save As :
- Name : Task Execution Details
- Click on Select Folder and select Custom Dashboards
- Click on Select Folder and then Save

Dashboard

Task Execution Details

As of 29-Mar-2024, 9:55 am - Viewing as Paila Bhargavi

Refresh Edit Subscribe ▾

Venue Name ↑	Drop-Off point Name	Distance
La Royale Banquet Hall.	Shapur	5.1161
La Royale Banquet Hall.	Jeedimetla	6.9030k
Paradise Garden Function Hall	Suraram Village	28.2332
Ujwala Grand	-	-

venue and Drop Off point

View Report (venue and Drop Off point)

Volunteer Task

Record Count

1
0.5
0

4 2

Volunteer ID

View Report (Volunteer Task)

Activity 15: Sharing Rules

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

- Field: Operator: Value = Distance: greater than: 30
- Field: Operator: Value = Distance: less or equal: 50
- Select the users to share with: Near Share With
- Public Groups: Street Cause
- Click on Save.

Drop-Off point Sharing Rules		New	Recalculate	Drop-Off point Sharing Rules Help	?
Action	Criteria			Shared With	Access Level
Edit Del	Drop-Off point: Distance LESS OR EQUAL 15			Group: Iksha	ReadWrite
Edit Del	(Drop-Off point: Distance GREATER THAN 15) AND (Drop-Off point: Distance LESS OR EQUAL 30)			Group: NSS	ReadWrite
Edit Del	(Drop-Off point: Distance GREATER THAN 30) AND (Drop-Off point: Distance LESS OR EQUAL 50)			Group: Street Cause	ReadWrite

Activity 16: Home Page

Creation Of Home Page

- Go to setup>>type Lightning App Builder in quick find box >> Click on the Lightning App Builder and Select the New.
- Select Home Page and give Label as HOME Page.
- Select Standard Home Page.
- Near Components search for Flow and Drag and Drop in RightSide Section
- On the right handside:
- Flow: Venue Flow
- Near Components search for Dashboard, then Drag and Drop it in first Section.

The screenshot shows the Salesforce Home page with the following components:

- Task Execution Details**: A dashboard section with a table titled "venue and Drop Off point" showing locations like La Royale Banquet Hall, Shapur, and Jeedimetla.
- Volunteer Task**: A bar chart showing the count of records for different volunteer IDs.
- Flow Component: Venue Form**: A placeholder for a flow component, indicating it's a placeholder and flows don't run in the canvas.
- Add Component(s) Here**: Two empty slots for adding new components.

- Click on Save and Activation, then click on App Default, then Add Assignments.
- Add FoodConnect App and then Save.
- FoodConnect Home Page would Look Like this.

The screenshot shows the FoodConnect Home page with the following structure:

- Navigation Bar**: Includes links for Home, Venues, Tasks, Drop-Off points, Execution Details, Volunteers, Reports, and Dashboards.
- Dashboard Area**: Displays the same "Task Execution Details" content as the previous screenshot, including the "venue and Drop Off point" table and the "Volunteer Task" bar chart.
- Form Area**: On the right side, there is a "Venue Form" section with fields for Venue Name, Email, Phone, and Venue Location, along with a "Next" button.

Conclusion

By leveraging the Salesforce platform, the project successfully established a streamlined and transparent system for managing surplus food donations. Through efficient coordination with volunteers and timely delivery to beneficiaries, the project effectively addressed food insecurity while maximizing the utilization of available resources.

