

FOOD CONNECT

- To Supply Leftover Food To Poor

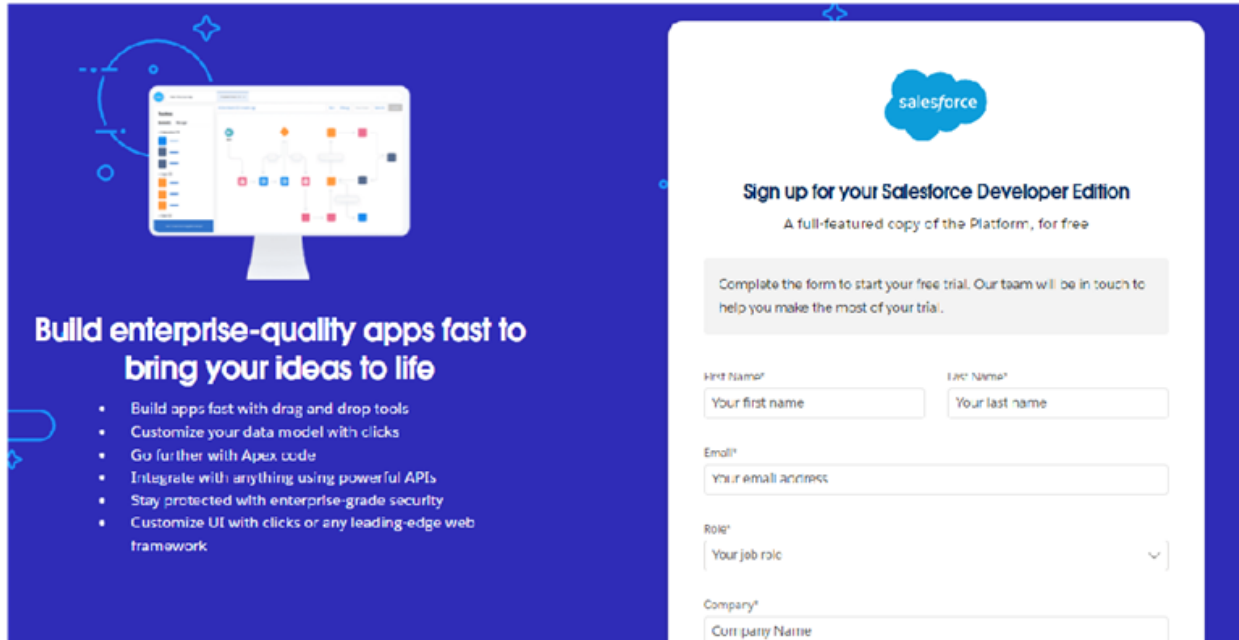


Salesforce developer account creation

Creating Developer Account

Creating a developerorg in salesforce.

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



- a. First name & Last name
- b. Email
- c. Role : Developer
- d. Company : College or Company Name
- e. Country : India
- f. Postal Code : pin code
- g. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format :

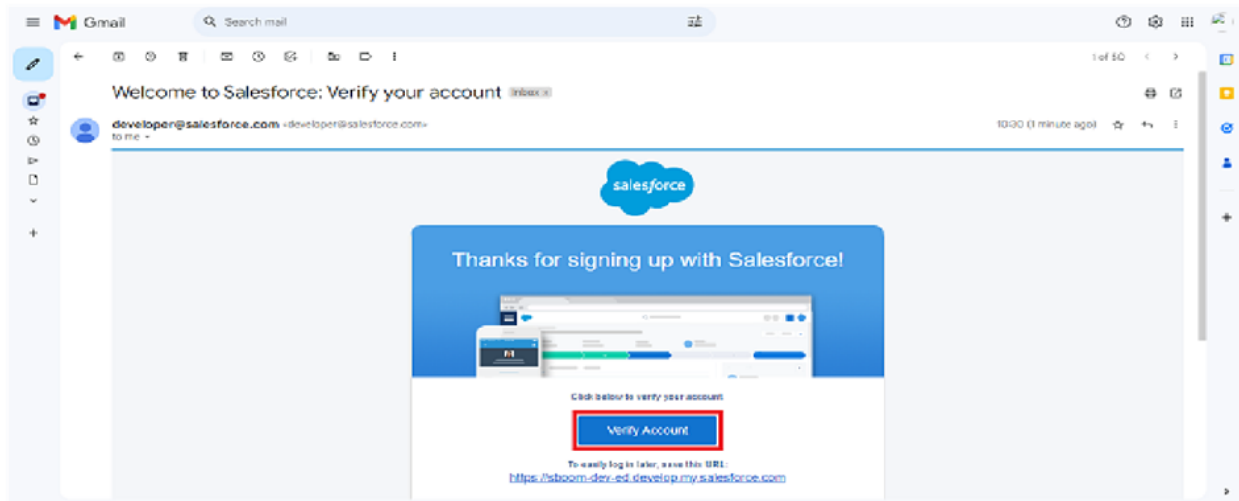
username@organization.com

Click on sign me up after filling these.

Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.

The email may take 5-10mins.



Click on Verify Account

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

1. Give a password and answer a security question and click on change password.
2. Then you will redirect to your salesforce setup page

Object Creation:

1. What is an Object? How a Custom Object is Created

Object:

1. An object in Salesforce is a database table that allows you to store information specific to your organization. Objects can be standard (provided by Salesforce) or custom (created by users)

Create Venue Object

To create an object:

- a. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
1. Enter the label name >> Venue
 2. Plural label name >> Venues
 3. Enter Record Name Label and Format
 - a. Record Name >> Venue Name
 - b. Data Type >> Text
 1. Click on Allow reports and Track Field History, Allow Activities.
 2. Allow search >> Save.

In the same way Create Drop-Off Point Object, Task Object, Volunteer Object, Execution Detail Object.

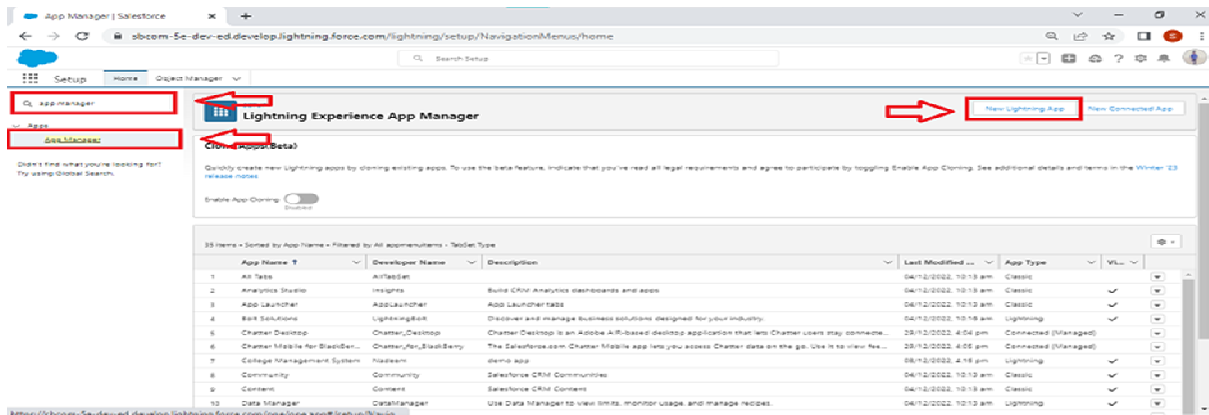
Tabs Creation:

1. **What is a Tab? How a Custom Tab is Created Tab:**
2. A tab in Salesforce is a user interface component that allows users to create, view, and edit records for an object. Tabs are associated with standard and custom objects and can be customized to enhance the user experience.

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)



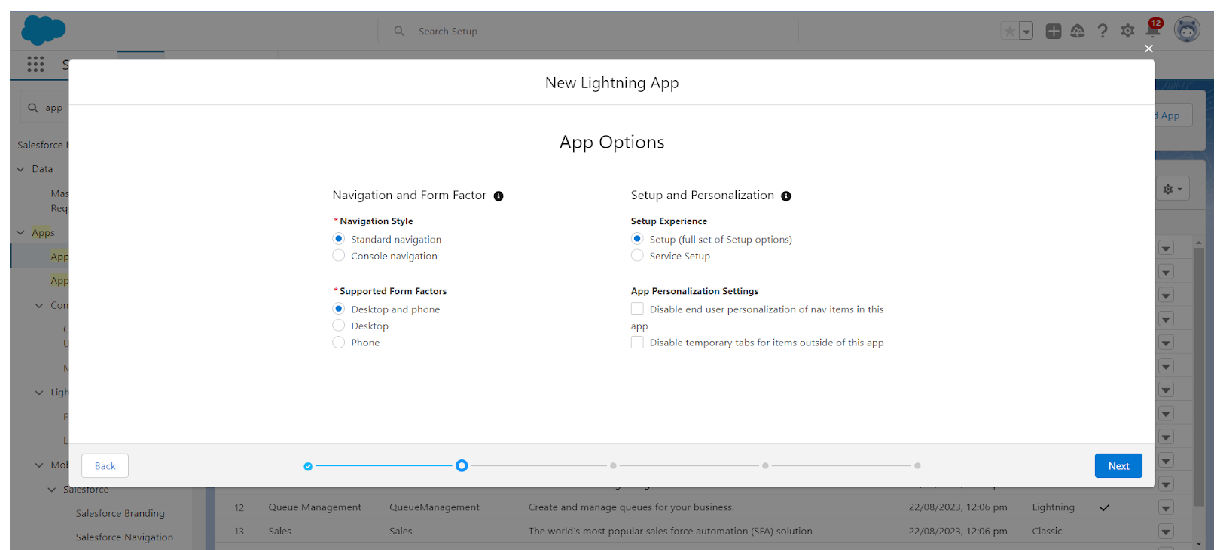
2. Fill the app name in app details and branding as follow

App Name : FoodConnect

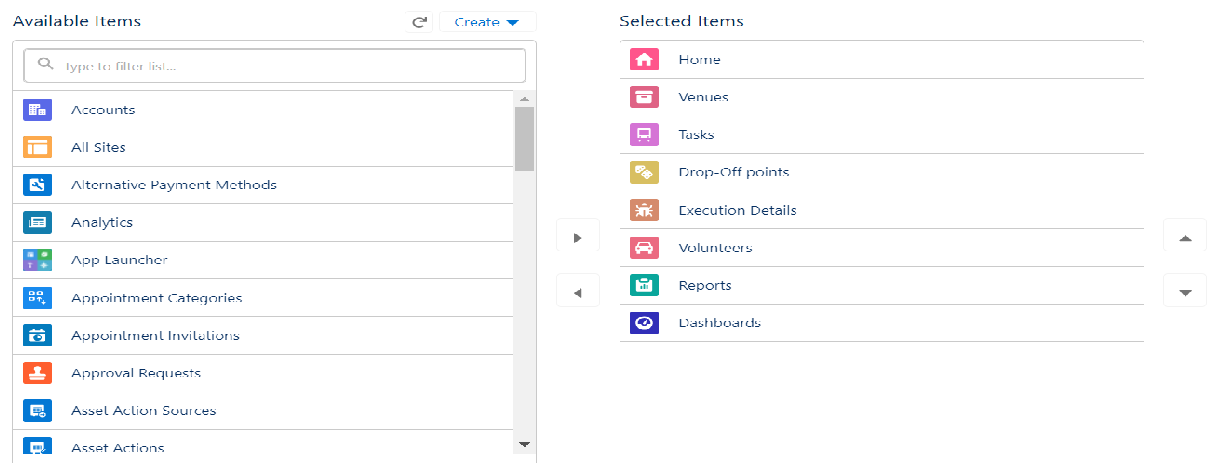
DeveloperName : This will auto populated

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

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

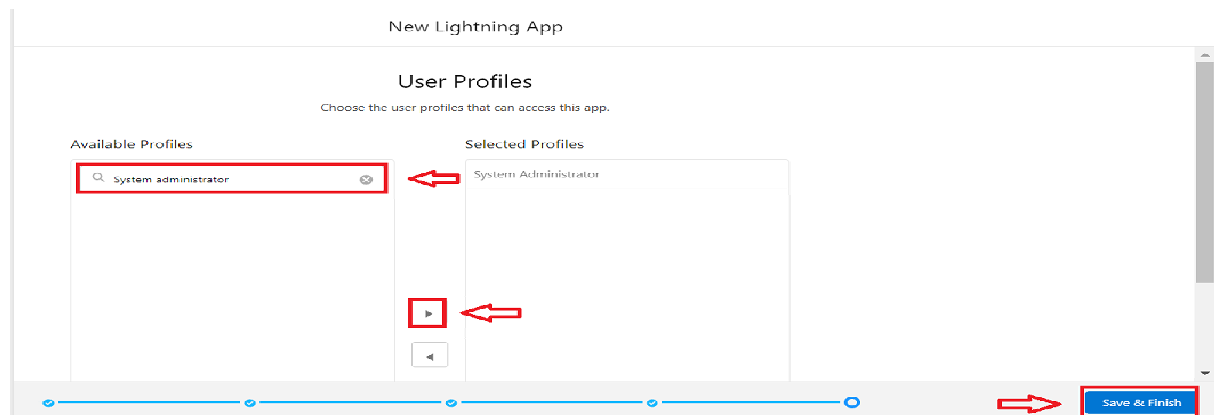


4. (Utility Items) keep it as default >> Next.
5. To Add Navigation Items:



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

1. To Add User Profiles:



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

4.What are Fields?

Fields:

1. Fields are data columns within an object, similar to columns in a database table.

They hold specific pieces of information related to the records of the object.

Creation of Relationship fields in objects

Creation of Lookup Relationship Field on Volunteer Object :

- a. Go to setup >> click on Object Manager >> type object name (Volunteer) in the search bar >> click on the object.
- b. Now click on "Fields & Relationships" >> New
- c. Select Master Detail relationship
- d. Select the related object "Drop-Off point" and click next.
- e. Field Name : Drop_Off_point
- f. Field label : Auto generated
- g. Next >> Next >> Save.

Creation of Master Detail Relationship Field on ExecutionDetails Object :

- h. Go to setup >> click on Object Manager >> type object name (ExecutionDetails) in the search bar >> click on the object.
- i. Now click on "Fields & Relationships" >> New
- j. Select Master Detail relationship
- k. Select the related object "Volunteer" and click next.
- l. Field Name : Volunteer
- m. Field label : Auto generated
- n. Next >> Next >> Save.

Creation of Master Detail Relationship Field on Execution Details

Object :

- o. Go to setup >>click on Object Manager >>type object name(ExecutionDetails) in the search bar >> clickon the object.
- p. Now click on “Fields & Relationships” >>New
- q. Select Master Detail relationship
- r. Select the relatedobject “Task” and click next.
- s. FieldName : Task
- t. Field label : Auto generated
- u. Next >> Next >> Save.

Creation of Lookup Relationship Field on Drop-OffPoint Object :

- v. Go to setup >>click on ObjectManager >> type object name(Task) in thesearchbar >> click on the object.
- w. Now click on “Fields & Relationships” >>New
- x. Select Lookup relationship
- y. Select the related object “Drop-Off Point” and click next.

Field Name : Venue
Field label : Venue_c
Next >> Next >> Save.

Creation of Lookup Relationship Field on TaskObject :

- 1. Go to setup>> click on ObjectManager >> type object name(Task) in the searchbar >> click on the object.
 - 2. Nowclick on “Fields& Relationships” >>New
 - 3. 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 :

1. Go to setup>> click on ObjectManager >> type object name(Task) in the searchbar >> click on the object.
2. Nowclick on "Fields& Relationships" >>New
3. Select Lookup relationship
4. Select the related object "Drop-Offpoint" and click next.
5. Field Name : Drop-Off point
Field label : Auto generated
Next >>Next >> Save

Creation of fields for the Venue object

1. Go to setup>> click on Object Manager >> type object name(Venue) in searchbar >> click on the object.
2. Now click on "Fields & Relationships" >>New
3. Select Data type as a "Email" and Click on Next
4. Fill theAbove as following:
 - a. Field Label : Contact Email
 - b. Field Name : Contact Email
 - c. Click on requiredcheckbox
 - d. Clickon Next >> Next >>Save and new.

To create another fields in an object:

5. Go to setup >>click on ObjectManager >> type object name(Venue) in search bar >> click on the object.
6. Now click on "Fields & Relationships" >>New
7. Select Data type as a "Phone"and Click on Next
8. Fill the Above as following:

- e. Field Label : Contact Phone
- f. Field Name : Contact Phone
- g. Click on required check box
- h. Click on Next >> Next >> Save and new.

To create another fields in an object:

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

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Venue) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as a "LongText Area" and Click on Next
4. Fill the Above as following:
 - n. Field Label: Venue Location
 - o. Field Name : Venue_Location
 - p. 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.

1. Now click on "Fields & Relationships" >> New
2. Select Data type as a "Geolocation" and Click on Next
3. Fill the Above as following:
 - a. Field Label : Location 2
 - b. Field Name : gets auto generated
 - c. Description : Enter the Geolocation of the Drop off Point
 - d. Geolocation Options : select Decimal
 - e. Decimal Places : 4
 - f. Click on Next >> Next >> Save and new.

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Drop-Off point) in searchbar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as a "Formula" and Click on Next
4. Fill the Above as following:
 - g. Field Label : distance calculation
 - h. Field Name : distance_calculation
 - i. Formula Return Type : Number
 - j. Formula Options : DISTANCE(Location_2_c , Venue_r.Location_c , 'km')
 - k. Click on Next >> Next >> Save and new.

To create another fields in an object:

5. Go to setup >> click on Object Manager >> type object name(Drop-Off point) in searchbar >> click on the object.
6. Now click on "Fields & Relationships" >> New
7. Select Data type as a "Picklist" and Click on Next
8. Fill the Above as following:
 - l. Field Label : State

- m. FieldName : State
- n. Enter values, with each value separated by a new line:
- o. Click on requiredcheck box
- p. Clickon Next >> Next >>Save and new.

To create another fields in an object:

- 9. Go to setup >>click on Object Manager >>type object name(Task) in search bar >> click on the object.
- 10. Now click on "Fields & Relationships" >>New
- 11. Select Data type as a "Number" and Click on Next
- 12. Fill the Above as following:
 - q. Field Label: Distance
 - r. Field Name : Distance
 - s. Length : 14
 - t. Decimal Places : 4
 - u. Click on requiredcheck box
 - v. Clickon Next >> Next >>Save and new.

Creation of fields for the Task object

Go to setup>> click on ObjectManager >> type object name(Task) in search bar

>> clickon the object.

- 1. Nowclick on "Fields& Relationships" >>New
- 2. Select Data type as a "Auto Number"and Click on Next
- 3. Fill the Above as following:
 - a. FieldLabel : Task ID
 - b. DisplayFormat : TASK-{0}
 - c. Starting Number : 1

- d. Field Name : gets auto generated
- e. Click on required check box
- f. Click on Next >> Next >> Save and new.

To create another fields in an 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 "Date" and Click on Next
4. Fill the Above as following:
 - g. Field Label : Date
 - h. Field Name : Date
 - a. Click on required check box:

Andhra Pradesh

Assam

Bihar

Chattishgarh

Gujarat

Harayana

Himachal Pradesh

Jarkhand

Karnataka

Kerala

Maharastra

Madya Pradesh

Manipur

Meghalaya

Mizoram

Nagaland

Odisha

Punjab

Rajasthan

Sikkim

Tamil Nadu

Tripura

Telangana
Uttar Pradesh
Uttarakhand
Andaman and Nicobar(UT)
Chandigarh (UT)
Dadra & Nagar Haveli and Daman & Diu (UT)
Delhi [National Capital Territory (NCT)]
Jammu and Kashmir(UT)
Ladakh (UT)
Lakshadweep
(UT)
Puducherry
(UT)

- i. Click on Required Checkbox
- j. Click on Next >> Next >> Save and new.

To create another fields in an object:

- 5. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
- 6. Now click on "Fields & Relationships" >> New
- 7. Select Data type as a "Picklist(Multi-Select)" and Click on Next
- 8. Fill the Above as following:
 - k. Field Label: Food Category
 - l. Field Name : Food Category
 - m. Enter values, with each value separated by a new line :
Veg
Non-Veg
Salad
Snacks
 - n. Click on required check box
 - o. Click on Next >> Next >> Save and new.

To create another fields in an object:

9. Go to setup >>click on Object Manager >>type object name(Task) in search bar >> click on the object.
10. Now click on "Fields & Relationships" >>New
11. Select Datatype as a "Number" and Click on Next
12. Fill the Above as following:
 - p. Field Label : Number of People Served
 - q. FieldName : Number_of_People_Served
 - r. Click on requiredcheck box
 - s. Clickon Next >> Next >>Save and new.

To create another fields in an object:

13. Go to setup >>click on Object Manager >>type object name(Task) in search bar >> click on the object.
14. Now click on "Fields & Relationships" >>New
15. Select Data type as a "Text" and Click on Next
16. Fill the Above as following:
 - t. Field Label : Name of the Person
 - u. FieldName : Name_of_the_Person
 - v. Clickon Next >> Next >>Save and new.

To create another fields in an object:

1. Go to setup>> click on ObjectManager >> type object name(Task) in search bar >> click on the object.
2. Now click on "Fields& Relationships" >>New
3. Select Datatype as a "Phone" and Click on Next

4. 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:

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

6. Nowclick on “Fields& Relationships” >>New

7. Select Data type as a “Pick List” and Click on Next

8. Fill theAbove as following:

Field Label: Rating

Field Name : Rating

Enter Values,with each value seperated by a new line:

1

2

3

4

5

Click on Next >> Next >> Save and new.

To create another fields in an object:

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

2. Nowclick on “Fields& Relationships” >>New

3. Select Data type as a “LongText Area” and Click on Next

4. Fill theAbove as following:

a. Field Label: Feedback

b. Field Name : Feedback

- c. Click on Next >> Next >> Save and new.

Creation of fields for the Volunteer object

1. Go to setup >> click on Object Manager >> type object name(Volunteer) 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:
 - a. Field Label : Volunteer ID
 - b. Field Name : gets auto generated
 - c. Click on required check box
 - d. Click on Next >> Next >> Save and new.
 - e. Click on Next >> Next >> Save and new.

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
 2. Now click on "Fields & Relationships" >> New
 3. Select Data type as a "Picklist" and Click on Next
 4. Fill the Above as following:
 - f. Field Label: Gender
 - g. Field Name : Gender
 - h. 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:

5. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
6. Now click on "Fields& Relationships" >>New
7. Select Data type as a "Date" and Clickon Next
8. Fill the Above as following:
 - i. Field Label : Available On
 - j. Field Name : Available On
 - k. Click on requiredcheck box
 - l. Clickon Next >> Next >>Save and new.

To create another fields in an object:

9. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
10. Now click on "Fields& Relationships" >>New
11. Select Data type as a "Number" and Click on Next
12. Fill theAbove as following:
 - m. Field Label: Age
 - n. Field Name : Age
 - o. Click on requiredcheck box
 - p. Clickon Next >> Next>> Save and new.

To create another fields in an object:

13. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
14. Now click on "Fields& Relationships" >>New
15. Select Data type as a "Email" and Click on Next
16. Fill the Above as following:
 - q. Field Label : Email

- r. Field Name : Email
- s. Click on required check box
- t. Click on Next >> Next >> Save and new.

To create another fields in an object:

- 17. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
- 18. Now click on "Fields& Relationships" >>New
- 19. Select Datatype as a "Number" and Click on Next
- 20. Fill the Above as following:
 - u. Field Label: Contact Number
 - v. Field Name : Contact_Number
 - w. Click on required check box
 - x. Click on Next >> Next >> Save and new.

To create another fields in an object:

- 21. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
- 22. Now click on "Fields& Relationships" >>New
- 23. Select Data type as a "Text Area (Long)" and Click on Next
- 24. 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:

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

bar >> click on the object.

26. Now click on "Fields & Relationships" >>
New

27. 27. Select Data type as a "Date" and Click
on Next 28.

28. Fill the Above as following:

Field Label : Date of Birth

FieldName : Date_of_Birth

Click on Next >> Next >> Save and new.

Creation of fields for the Execution Details object

1. Go to setup >> click on Object Manager >> type
objectname(Volunteer) in searchbar >> 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:
 - a. Field Label : Execution ID
 - b. Field Name : gets auto generated
 - c. Click on required check box
 - d. Click on Next >> Next >> Save and new.

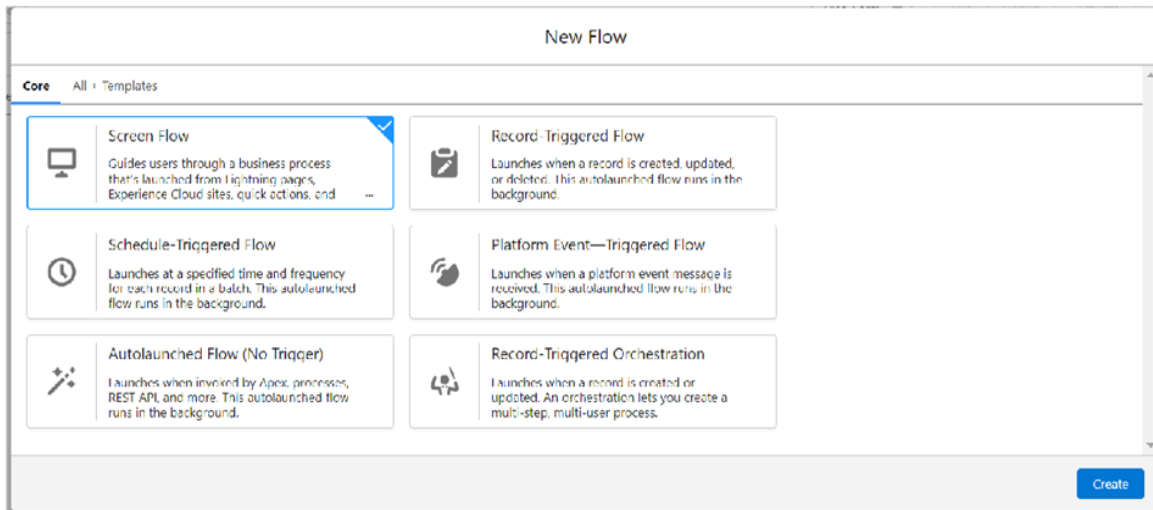
What are Flows? Create Flow to Create a Record in Venue Object

Flows:

1. Flows in Salesforce are automation tools that can collect data
and perform actions in Salesforce. Flows can be used to
automate complex business
processes by using a point-and-click interface.

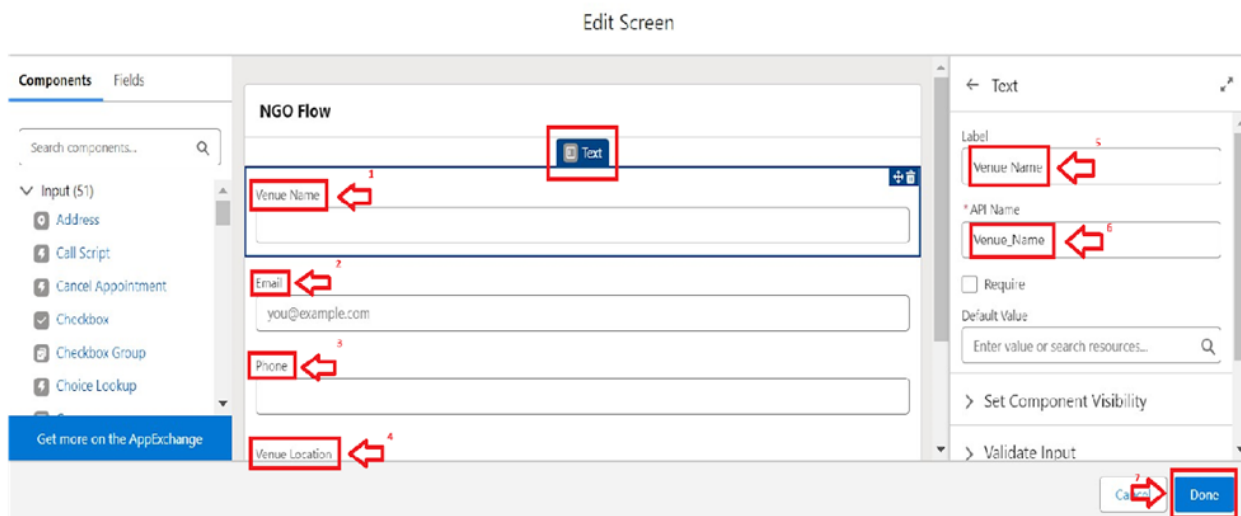
Create Flow to create a record in Venue object

1. Go to setup >>type Flow in quick find box >>Click on the Flow and Select the NewFlow.
2. Select the Screenflow. 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. Click on Number Component and name it as:
Label : longitude
API Name : longitude
- Next click on Done. This would like below



Click on the '+' icon in between Venuedetails 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	Value
Contact_Email__c	{!Contact_Email.value}
Contact_Phone__c	{!Contact_Phone.value}
Name	{!Venue_Name}
Venue_Location__c	{!location}

Click on Save as:

Flow Label : Venue

Form Flow API

Name: Venue_Form

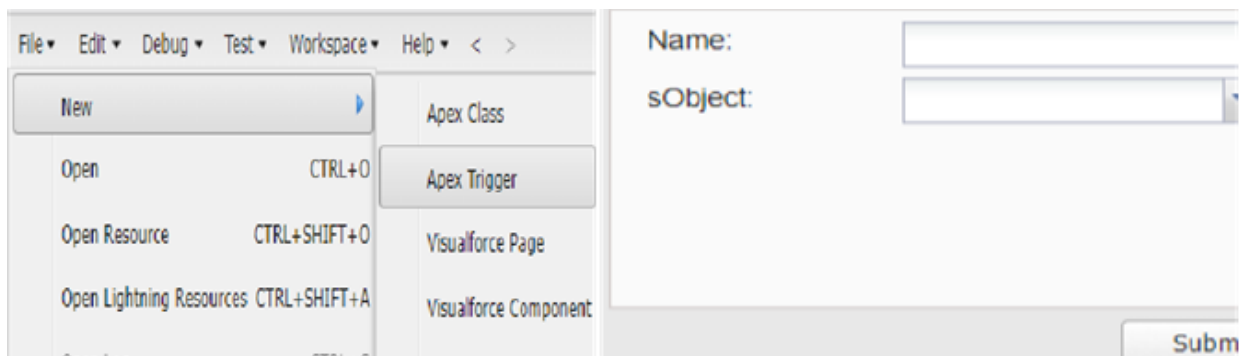
What is a Trigger? Create a Trigger, TriggerCode

Trigger:

2. A trigger is an Apex script that executes before or after specified database events, such as insert, update, or delete.

Create a Trigger

- a. Log into the trailhead account, navigate to the gear icon in the top right corner.
- b. Click on developer console and you will be navigated to a new console window.
- c. Click on the File menu in the toolbar, and click on new >> Trigger.
- d. 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__cDrop: Trigger.new){
        Drop.Distance__c= Drop.distance_calculation__c;
    }
}

```

What are Profiles and Creation of Users Profiles:

1. Profiles in Salesforce define a user's permissions to perform different functions within Salesforce. Profiles control access to objects, fields, and various functionalities.

Profiles

1. Go to setup page >> type Profiles in Quick Find bar >> click on Profiles >> click on 'S'
2. Click on Clone beside Standard Platform User.
3. Under Clone Profile:
Profile Name : NGOs Profile Then click on Save.

Creation of User1

1. Go to setup page >> type users in Quick Find bar >> click on users >> New user.
2. In General Information give details as: (Note : create users as per your wish NGO's)

First Name : Iksha Foundation

Last Name: Iksha_Foundation

Alias : iiksh

Email : GiveYour

Email

Username : suchitrafoundation@mk.com (give the username different)

Nickname : Auto Populated

UserLicense : Salesforce
PlatformProfile : NGOs Profile
Active : Check

3. Click on Save

Creation of User2, User3

1. Create another Two Users by following steps in Activity- 1 with similar User License and Profile.
2. Give Different First Name, Last Name based on Different NGO's.

<div><div>New User</div><div>Reset Password(s)</div><div>Add Multiple Users</div></div>						
<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dns000000fdr2ae.cr1pefl92dz@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Iksha_Foundation Iksha Foundation	iksh	ikshafound@sb.com		✓	NGOs Profile
<input type="checkbox"/> Edit	Kada_Bindhu Madhavi	BKada	kbindhulendi@gmail.com		✓	System Administrator
<input type="checkbox"/> Edit	NSS_NSS	nss	nss1@gmail.com		✓	NGOs Profile
<input type="checkbox"/> Edit	Street_Cause_Street Cause	sttre	streetcause1@gmail.com		✓	NGOs Profile
<input type="checkbox"/> Edit	User_Integration	inte	integration@00dns000000fdr2ae.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightsecurity@00dns000000fdr2ae.com		✓	Analytics Cloud Security User
<div><div>New User</div><div>Reset Password(s)</div><div>Add Multiple Users</div></div>						

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

What are Public Groups and Creation of Public Groups

Public Groups:

1. Public Groups are collections of users that can be used to simplify the sharing of records, access permissions, and reporting within Salesforce

Creation of PublicGroup 1

- i. Go to setup page >> type Public Groups in Quick Find bar >> click on Public Groups >> click on New.
- ii. Under Group Information:
Label : Iksha
Group Name: Iksha

Grant Access Using Hierarchies : Check

- iii. In Search, Select Users.

- iv. In Selected Members Add Iksha Foundation and SystemAdministrator

Creation of PublicGroup 2

1. By FollowingSteps in Activity1, Create other two Public Groups for other two users.
2. After Saving this would look like this.

Public Groups

[Help for this Page](#) ?

A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.

View: All Edit Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other All

New				
Action	Label ↑	Group Name	Created By	Created Date
Edit Del	Iksha	Iksha	Kada_Bindhu Madhavi	02/08/2024, 2:56 pm
Edit Del	NSS	NSS	Kada_Bindhu Madhavi	02/08/2024, 3:04 pm
Edit Del	Street Cause	Street Cause	Kada_Bindhu Madhavi	02/08/2024, 3:05 pm

What are Report Types and Creation of Report Type

Report Types:

Report Types in Salesforce define the objects and fields that are available for use

in reports. Custom report types can be created to combine data from different objects.

Creation of Report Types

1. Go to setup page >> type Report Types in Quick Find bar >> click on Report Types >> click on Continue >> Click on New Custom Report Type.

2. In Define the Custom Report Type:

Report Type Label : Venue with DropOff with
Volunteer ReportTypeName :

Venue_with_DropOff_with_Volunteer

Primary Object : Select Venues

Description : Venue withDropOff with

VolunteerStore in Category : Select

Other Reports Deployment Status :

Deployed

- i. Click on Next
- ii. Near Click to relate another Object Select Drop-Off Points.
- iii. And also select "A" records may or may not have related "B" records.
- iv. Now again Near Click to relate another Object Select Volunteers.
- v. Now click on Save.

Report Creation

Creation of Report on Venue with DropOff with Volunteer

- vi. Go to the app(FoodConnect) >> click on the reports tab
- vii. Click on New Folder.
Folder Label: Custom Reports
Folder Unique Name : CustomReports
- viii. Open CustomReports and click on New Report
- ix. Select Report Type : Venue withDropOff with Volunteer
- x. Then click on Start Report.
- xi. In GROUP ROWS : Add VolunteerName
- xii. In Columns : Add Venue Name, Drop-Off pointName, Distance.
- xiii. Now click on Save & Run.
- xiv. Give Label as :
- xv. Report Name : venue and Drop Off point
- xvi. Report Unique Name : Auto Populated
- xvii. Click on Select Folder and select Custom Report, then click on Save.

Creation of Report on Volunteers with

ExecutionDetailsand Tasks

1. Go to the app(FoodConnect) >> click on the reports tab
2. Click on Custom ReportsFolder and click on New Report
3. Select Report Type : Volunteers with Execution Details and Tasks.
4. Then click on Start Report.
5. In GROUP ROWS : Volunteer ID
6. In Columns : Add Volunteer : Volunteer Name, Task : Task Name, Execution Detail : Execution Detail Name, Volunteer: Owner Name, Task: Date, Task: Rating.
7. Now click on Save &Run.
8. GiveLabel as :

Report Name : Volunteer Task

Report Unique Name : Auto Populated

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

What are Dashboards?

Dashboards:

1. Dashboards in Salesforce are visual representations of reports, allowingusers tomonitorkey metrics and performance indicators at a glance.

Adding venue and Drop Off point Report to the

Dashboard

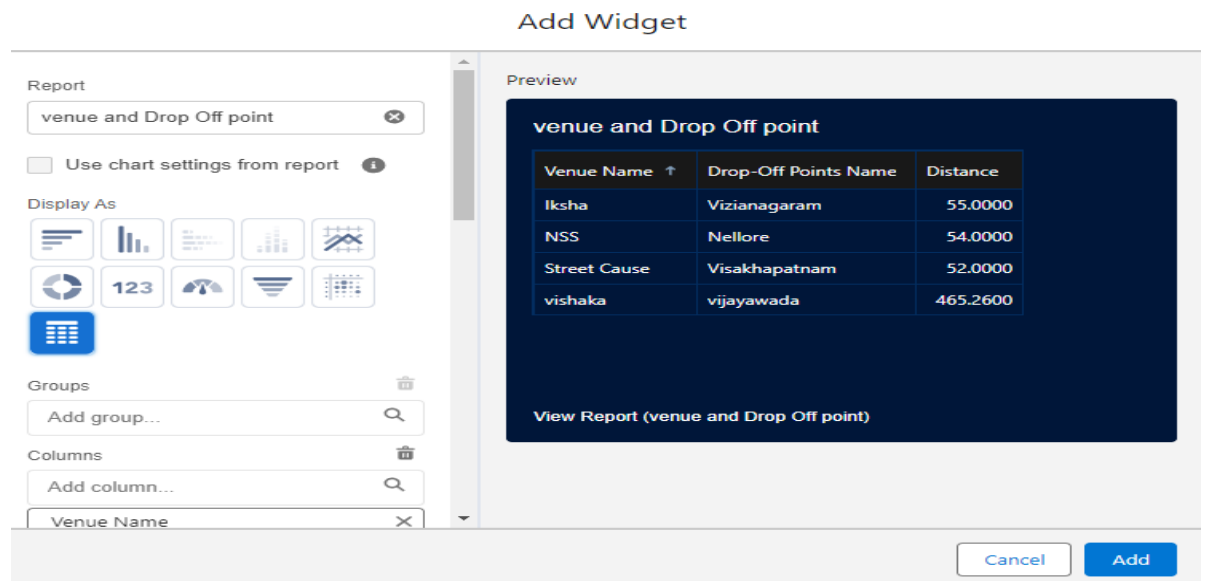
- 1.Go to the app(FoodConnect) >> click on the Dashboards tab.
- 2.Click on New Folder.
Folder Label:Custom Dashboard
Folder Unique Name:Auto Populated
- 3.Open Custom Dashboards and click on New Dashboards
- 4.Name : Organization Details

5. Click on Widget and select Chart or Table
6. In Select Report : Select venue and Drop Off point Report.
7. Then click on select
8. In Add Component:

Display As : Select Lightning Table

Component Theme : Select Dark

(Optional)



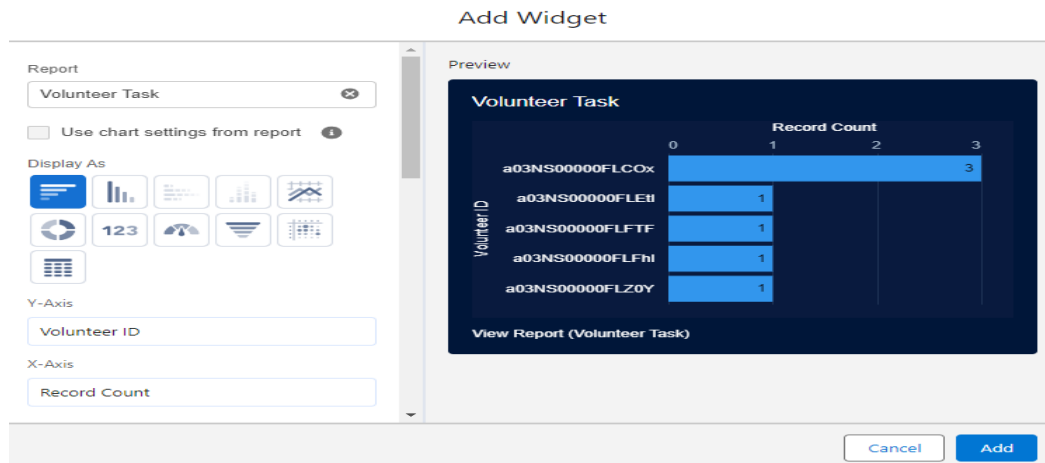
1. Now click on save.

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)



. Now click on save.

Adding a Picture to the Dashboard (Optional)

(Note : To uploadan image intothe Dashboard, we have to first downloadan image fromgoogle or othersources into yoursystem)

1. Click on Widget and select Image.Then click on Browse Files.
2. Then Selectthe Picture you want to upload in this Dashboard.
3. Then click on Save As :

Name : TaskExecution Details

Click on Select Folder and select Custom Dashboard

- 4.Click on Select Folder and then Save.



What are Sharing Rules? Creation of Sharing Rules

Sharing Rules:

1. Sharing Rules in Salesforce are used to extend the sharing access granted to users. They allow you to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Creation of sharing rules

- i. Go to setup >> type Sharing Settings in quick find box >> Click on the Sharing Settings.
- ii. Scroll down and find Drop-Off point Sharing Rules.
- iii. Click on new near Drop-Off point Sharing Rules and Name it as:

Label : Rule 1

RuleName : Rule_1
- iv. Select your rule type : Select Based on criteria.
- v. Select which records to be shared:

Field: Operator : Value= Distance : lessthan : 15

- vi. Select the users to share with :
Near Share With Public Groups:
Iksha
- vii. Clickon Save.
- viii. Click on new near Drop-Off point Sharing Rules
and Name it as:

Label : Rule 2

RuleName : Rule_2

- ix. Select your rule type : Select Based on criteria.
- x. Select which records to be shared:

Field : Operator : Value = Distance :
greater than : 15

Field:Operator:Value=Distance:lesserequ
al:30 Select the users to share with :
Near Share With

Public Groups : NSS

- 1. Click on Save.
- 2. Click on new near Drop-Off point Sharing Rules and Name it as:

label:Rule_3

Rule Name : Rule_3

- 3. Select your rule type : Select Based on criteria.
- 4. Select which records to be shared:

Field: Operator : Value= Distance :
greater than : 30Field : Operator : Value =
Distance: less or equal : 50

- 5. Select the users to share with : Near Share
WithPublicGroups : Street Cause
- 6. 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 THAN 15	Group: Iksha		Read Only	
Edit Del	(Drop-Off Point: Distance GREATER THAN 15) AND (Drop-Off Point: Distance LESS OR EQUAL 30)	Group: NSS		Read Only	
Edit Del	(Drop-Off Point: Distance GREATER THAN 30) AND (Drop-Off Point: Distance LESS OR EQUAL 50)	Group: Street Cause		Read Only	

Home Page and Creation of Home Page

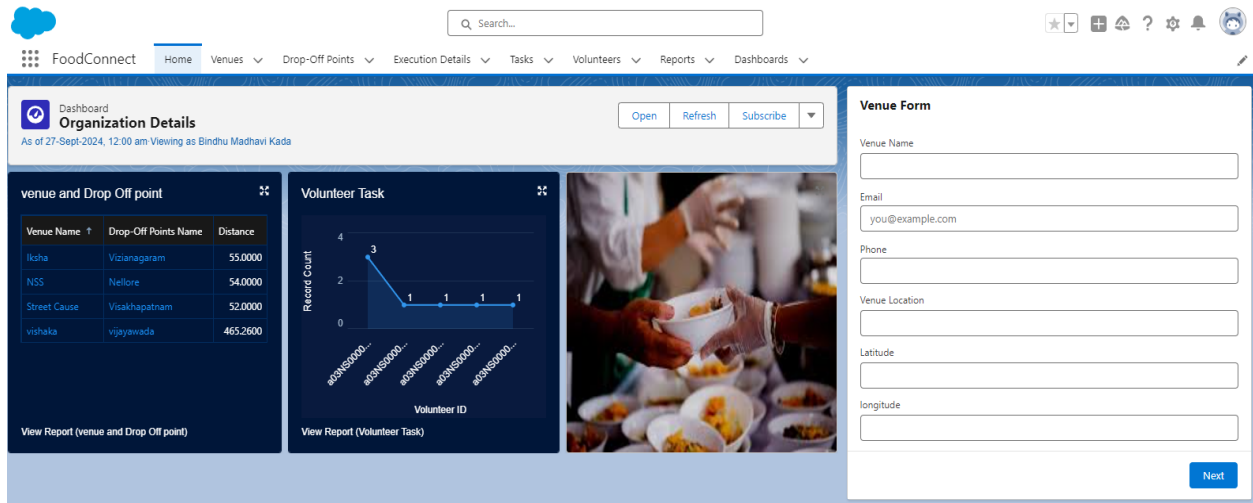
Home Page:

1. The Home Page in Salesforce is a customizable page that provides users with an overview of their tasks, calendar events, and other important information.

Creation of Home Page

- a. Go to setup >> type Lightning App Builder in quick find box >> Click on the Lightning App Builder and Select the New.
- b. Select Home Page and give Label as HOME Page.
- c. Select Standard Home Page.
- d. Near Components search for Flow and Drag and Drop in Right Side Section..
- e. On the right hand side:

Flow : Venue Flow
- f. Near Components search for Dashboard, then Drag and Drop it in first Section.
- g. Click on Save and Activation, then click on App Default, then Add Assignments.
- h. Add FoodConnect App and then Save.
- i. FoodConnect Home Page would Look Like this.



Conclusion:

By utilizing the Salesforce platform, the project successfully created a streamlined and transparent system for managing surplus food donations. With efficient coordination of volunteers and timely delivery to beneficiaries, the project effectively tackled food insecurity and maximized the use of available resources.