FOOD CONNECT

-To Supply LeftoverFood to Poor
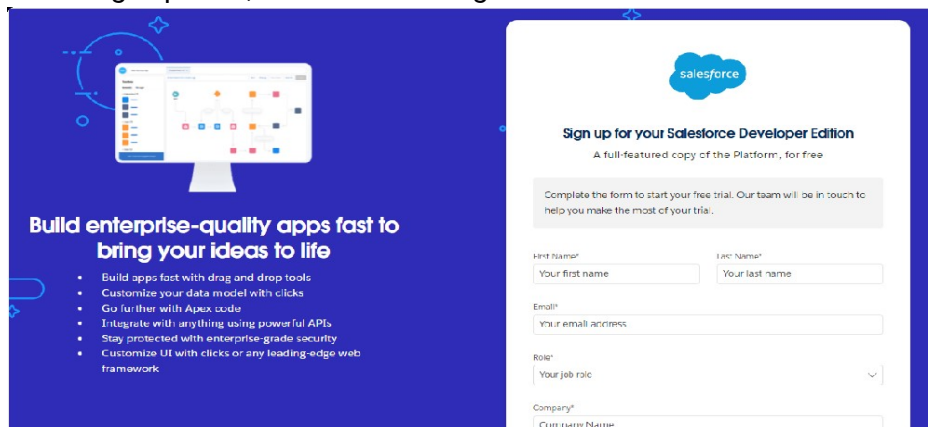

Salesforce developer account creation

Creating Developer Account

Creating a developer org in salesforce.

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

   a. First name & Last name

b. Email

c. Role : Developer

d. Company : College or Company Name

e. County : India

f. Postal Code : pin code

g. Username : should be a combination of your name and companyThis need not be an actual email id, you can give anything in the format : username@organization.com

Click on sign me up after fillingthese.

Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify accountto activate your account. The email may take 5-10mins.
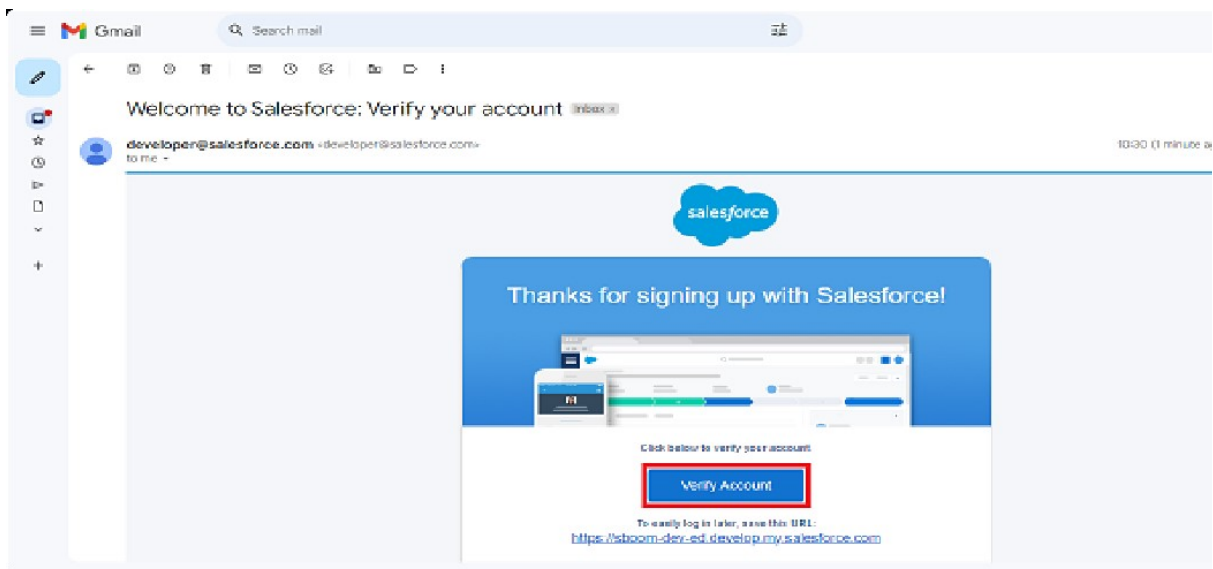
Click on VerifyAccount

1. Give a password and answer a security question and click on changepassword.

2. Then you will redirect to your salesforce setup page.

Object Creation:

1. What is an Object? How a Custom

Object is CreatedObject:

An object in Salesforce is a databasetable that allows you to store information specific to your organization. Objectscan be standard (provided by Salesforce) or custom (createdby users)
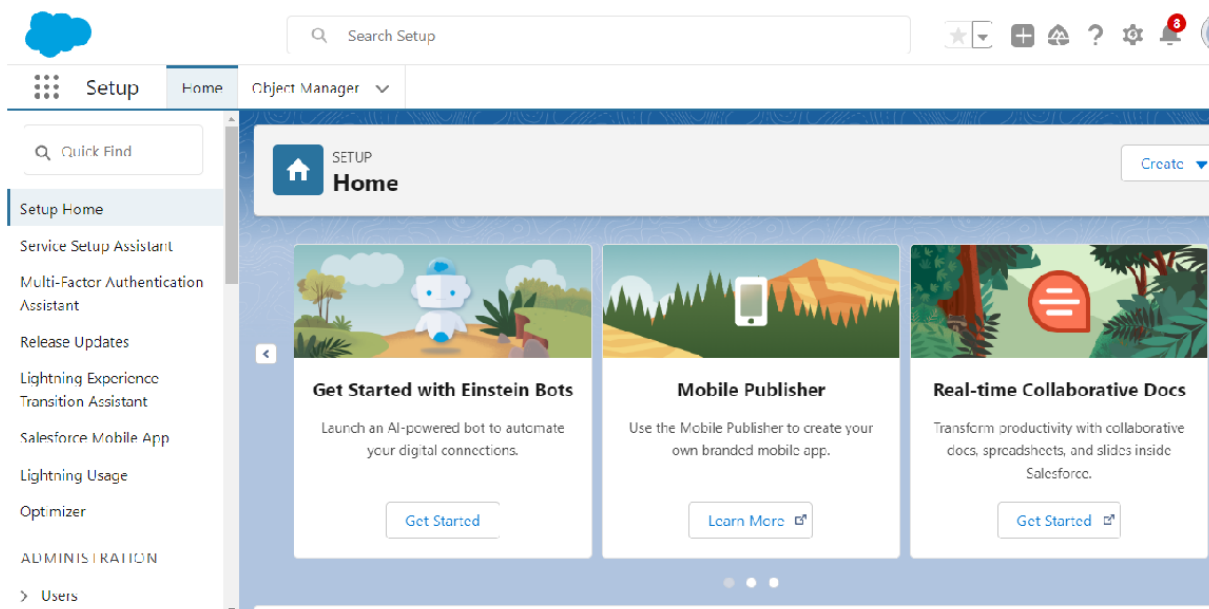
Create Venue Object

To create an object:

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 RecordName 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,ExecutionDetail Object.

Tabs Creation:

1. ## What is a Tab? How a Custom Table is CreatedTab:

2. A tab in Salesforce is a user interface component that allows usersto

   create,view, and edit records for an object. Tabs are associated with

   standard and custom objectsand can be customized to enhance the

   user experience.

Creating a Custom Tab:

To create a Tab:(Venue)

Go to setuppage >> type Tabs in Quick Find bar >>click on tabs >> New (undercustom object tab)

1. Select Object(Venue) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the includetab .

2. Make sure that the Append tab to users'existing personal customizations is checked.

3. Click save.

Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are "Drop-Off Point, Task, Volunteer, Execution Details".

2. Follow the same steps as mentioned in aboveactivity.

Creating a Lightning App:

To create a lightning app page:

Go to setup page >> search "app manager"in quick find >> select "appmanager" >> click on New lightningApp.
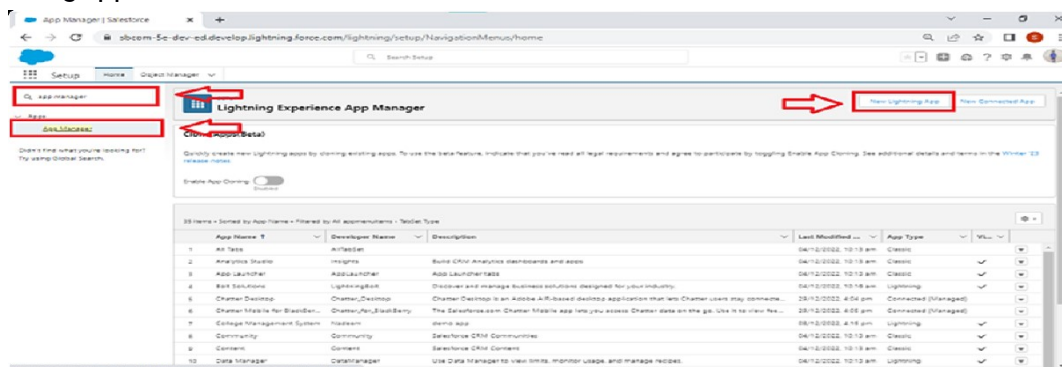
1. Fill the app name in app detailsand branding as followApp

   Name : FoodConnect

   Developer Name: This willauto populated

   Image : optional (if you want to give any image youcan otherwise notmandatory) Primary color hex value : keep this

default.

2. Then click Next >> (App option page)Set Navigation Style as StandardNavigation>> Next.
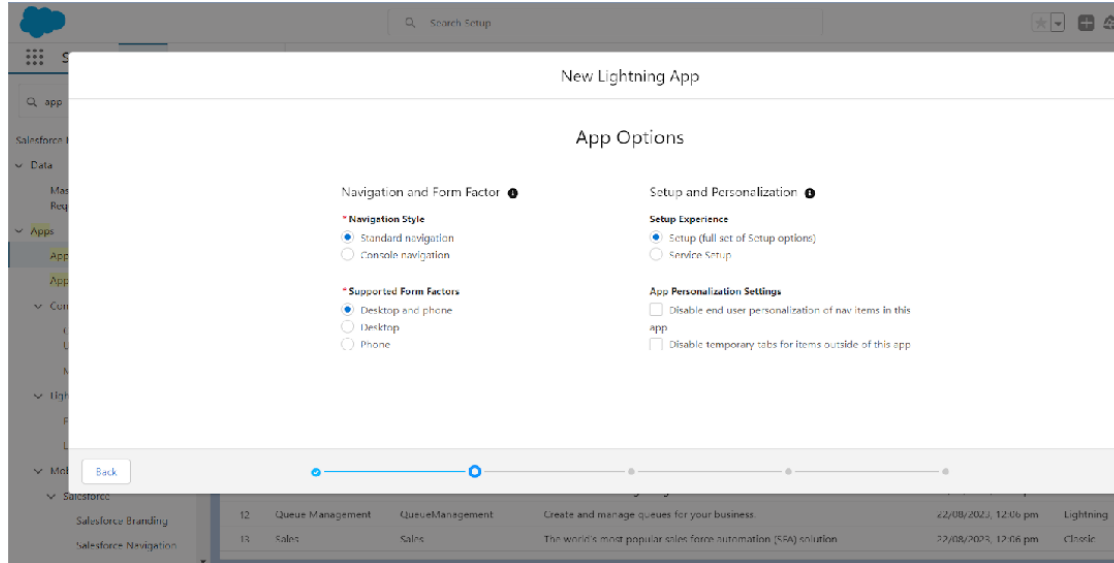
3. (Utility Items) keep it as default >> Next.
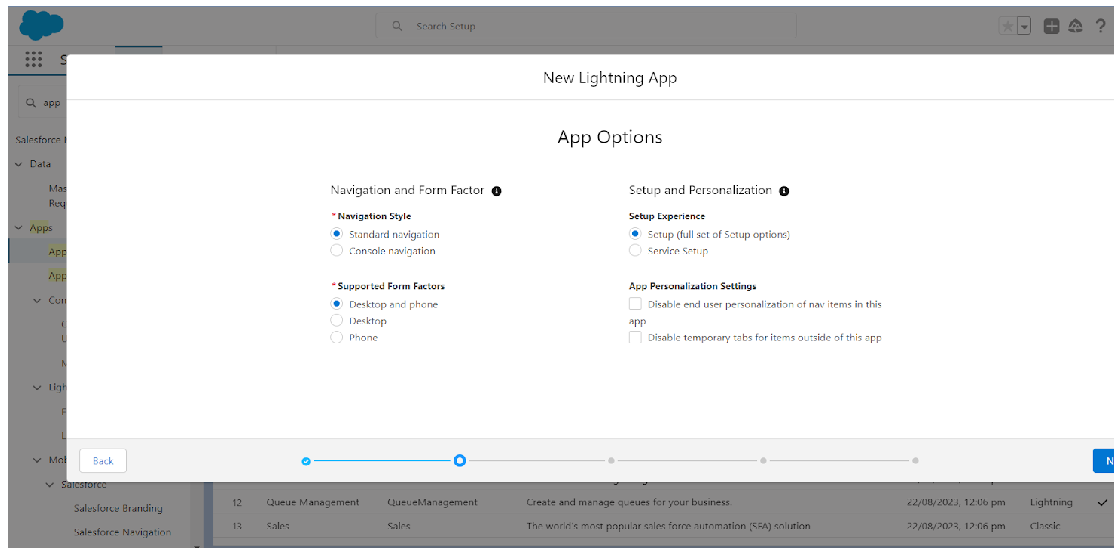
4. To Add Navigation Items:
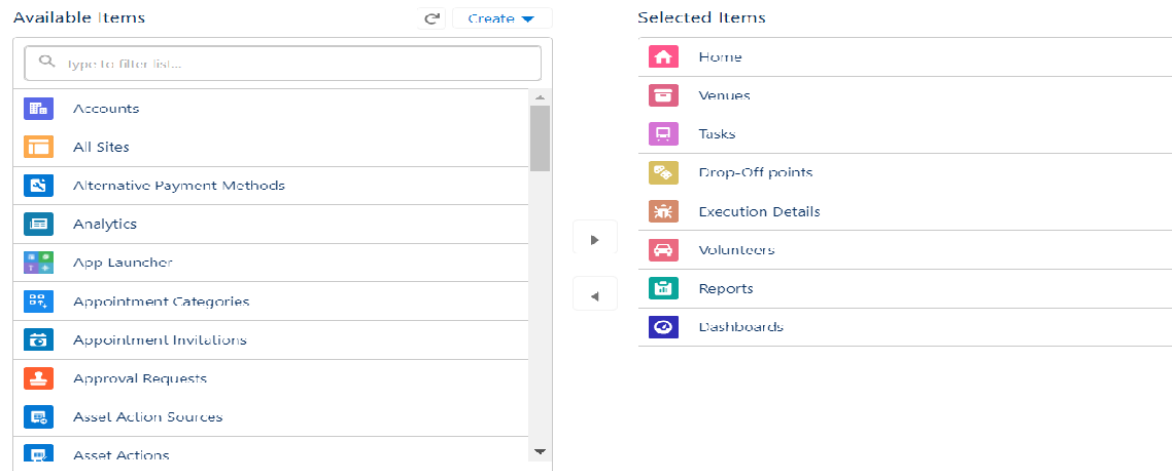
5.Search for the item in the (Home, Venue, Drop-Off Point, Task, Volunteer, Execution Details, Reports) from the search bar and move it using the arrow button >>Next >> Next.

6.To Add User Profiles:
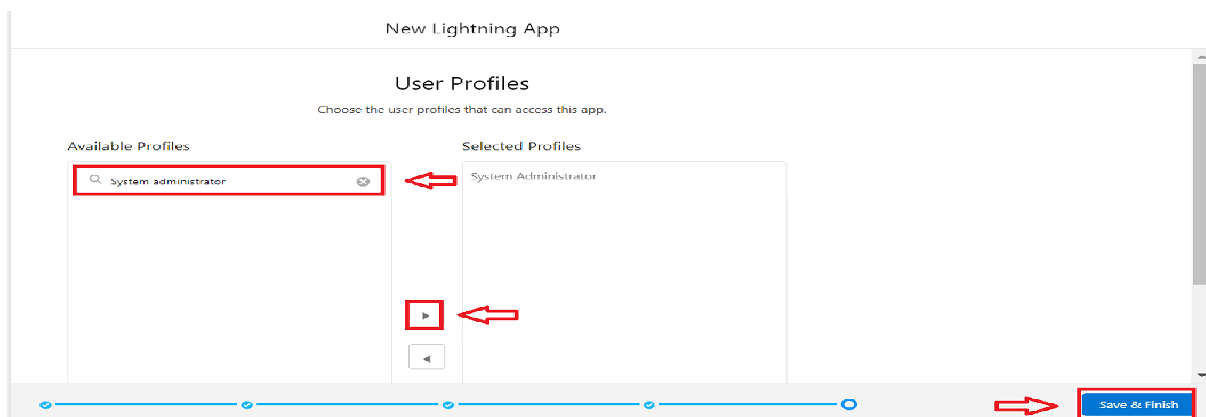
Search profiles(System administrator) in the searchbar >> clickon thearrow button >> save

What are Fields?

Fields:

Creation of Relationship fields in objects
Creation of Lookup Relationship Field on VolunteerObject :

Go to setup >> click on Object Manager >> type object name(Volunteer) in the searchbar >> click on the object.
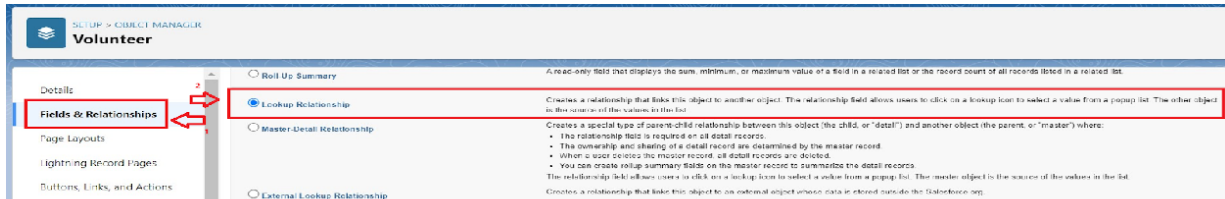
a. Now click on "Fields & Relationships" >>New

b. Select Master Detail relationship

c. Select the relatedobject "Drop-Off point" and click next.

d. Field Name : Drop_Off_point

e. Fieldlabel : Auto generated

f. Next >> Next >> Save.

Creation of Master DetailRelationship Field on Execution DetailsObject :

a. Go to setup >>click on Object Manager >>type object name(Execution Details) in the search bar >> clickon the object.

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

c. Select Master Detailrelationship

d. Select the related object "Volunteer" and click next.

e. Field Name : Volunteer

f. Field label: Auto generated

g. Next >> Next >> Save.

Creation of MasterDetail Relationship Fieldon Execution DetailsObject

h. Go to setup >>click on Object Manager >>type object name(Execution Details) in the search bar >> clickon the object.

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

j. Select Master Detailrelationship

k. Select the relatedobject "Task" and click next.

l. Field Name : Task

m. Field label: Auto generated

n. Next >> Next >> Save.

Creation of LookupRelationship Field on Drop-Off Point Object :

a. Go to setup >>click on ObjectManager >> type object name(Task) in the searchbar >> click on the object.

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

c. Select Lookup relationship

d. Select the related object "Drop-Off Point" and click next.

e. Field Name : Venue Field Label:Venue_c

f. Next >> Next >> Save

Creation of LookupRelationship Field on Task Object:

1. Go to setup>> click on ObjectManager >> type object name(Task) in the searchbar >> click on the object.

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

3. Select Lookup relationship

Select the related object "Venue" and click next.

4. FieldName:Sponsored
5. Field label : Auto
   generated
6. Next >>Next >> Save.

Creation of LookupRelationship Field on Task Object:

1. Go to setup>> click on ObjectManager >> type object name(Task) in the
   searchbar >> click on the object.

2. Now click on "Fields& Relationships" >>New
3. Select Lookup relationship
4. Select the relatedobject "Drop-Off point" and click next.
5. Field Name : Drop-Off point.
6.Field label : Auto generated
7.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 the Above as following:
   a. FieldLabel : Contact Email

   b. Field Name : Contact Email

   c. Click on required check box

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

To create another fields in an object:

5. Go to setup >>click on ObjectManager >> type object name(Venue) insearch
   bar >> click on the object.

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

7. Select Datatype as a "Phone" andClick 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 ObjectManager >> type object name(Venue) insearch 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. FieldLabel : 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 ObjectManager >> type object name(Venue) insearch bar >> click on the object.
2. Now click on "Fields & Relationships" >>New
3. Select Data type as a "Long Text Area" and Click on Next
4. Fill the Above as following:

      n. FieldLabel : 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) insearchbar >> 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-Offpoint) in searchbar >> click on the object.
2. Now click on "Fields & Relationships" >>New
3. Select Data type as a "Formula" and Click onNext
4. Fill the Above as following:
   g. Field Label: distance calculation
   h. Field Name : distance_calculation
   i. Formula ReturnType : Number
   j. Formula Options : DISTANCE(Location_2_c , Venue_r.Location_c , 'km')
   k. Click on Next >> Next >> Save and new.

Formula Options

Formula Return Type	Number	
Decimal Places	4	

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.
Example: Fahrenheit = 1.8 * Celsius__c + 32 More Examples...

Simple Formula | Advanced Formula

Insert Field   Insert Operator ▼

distance caluclation (Number) =
DISTANCE(Location_2__c , Venue__r.location__c , 'km')

To create another fields in an object:

5. Go to setup >> click on Object Manager >> type object name(Drop-Offpoint) 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. Field Name : State

Enter values, with each value separated by a new line :Andhra Pradesh Andhra Pradesh
Arunachal Pradesh

Assam

Bihar

Chhattisgarh

Goa

Gujarat

Haryana

Himachal Pradesh

Jharkhand

Karnataka

Kerala

Maharashtra

Madhya Pradesh

Manipur

Meghalaya

MizoramNagala

nd 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)

     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) insearch 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: Distance

     q. Field Name : Distance

     r. Length : 14

     s. Decimal Places: 4

     t. Click on required check box

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

Creation of fields for the Taskobject

Goto setup>> clickon Object Manager>> type objectname(Task) in searchbar >> click on the object.

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

2. Select Data type as a "AutoNumber" and Clickon Next

3. Fill the Above as following:

     a. Field Label : Task ID

     b. Display Format : 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) insearch bar >> click on the object.
2. Now click on "Fields & Relationships" >>New
3. Select Data type asa "Date" and Click on Next
4. Fill the Above as following:

   g. Field Label : Date

   h. Field Name: Date

   i. Click on required check box

   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) insearch 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. FieldLabel : Food Category

   l. Field Name : Food Category

Enter values, with each value separated by a new line :Veg
Non-
Veg
Salad
Snack

   m. Click on required check box

   n. 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) insearch 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:

    o. Field Label : Number of People Served

    p. Field Name : Number_of_People_Served

    q. Click on required check box

    r. Click on 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:

    s. Field Label : Name of the Person

    t. Field Name : Name_of_the_Person

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

To create another fields in an object:

1. Go to setup>> click on ObjectManager >> type object name(Task) insearch bar >> click on the object.
2. Now click on "Fields& Relationships" >>New
3. Select Data typeas a "Phone" and Clickon Next
4. Fill the Above as following:

    v. FieldLabel : Phone

    w. Field Name : Phone

    x. 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) insearch bar >> click on the object.
6. Now click on "Fields& Relationships" >>New

7. Select Data type as a "Pick List" and Click on Next
8. Fill the Above as following:
   y. FieldLabel : Rating

   z. Field Name : Rating

a. Enter values, with each value separated by a new line :

   1

   2

   3

   4

   5

b. 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) insearch bar >> click on the object.
10. Now click on "Fields& Relationships" >>New

11. Select Data type as a "LongText Area" and Click on Next
12. Fill the Above as following:
    aa. FieldLabel : Feedback

    ab. Field Name : Feedback

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

Creation of fields for the Volunteer object

1. Go to setup >>click on ObjectManager >> type object name(Volunteer) in search bar >> click on the object.

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

3. Select Data type as a "AutoNumber" and Clickon 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

      i.   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 asa "Date" and Click on Next
8. Fill the Above as following:

      j.   Field Label : Available On

      k. Field Name: Available On

      l.   Click on required check box

      m. 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(Volunteer)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:

      n. FieldLabel : Age

      o. Field Name : Age

p. Click on required check box

q. Click on 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:

r. Field Label: Email

s. Field Name : Email

t. Click on required check box

u. 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:

v. FieldLabel : Contact Number

w. Field Name : Contact_Number

x. Click on required check box

y. 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:

z. Field Label : Address

aa. Field Name: Address

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

To create another fields in an object:

25. Go to setup>> click on Object Manager>> type objectname(Volunteer) insearch bar >>click on the object.

26. Now click on "Fields & Relationships" >> New
    27.Select Data type as a "Date" and Click on
    Next28.Fill the Above as following:

    ac. Field Label: Date of Birth

    ad. Field Name : Date_of_Birth

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

Creation of fields for the ExecutionDetails 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 "AutoNumber" and Clickon 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

ObjectFlows:

Flows in Salesforce are automation tools that can collect data and

performactions in Salesforce. Flows can be used to automate

complexbusiness 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 andSelect the NewFlow.

2. Select the Screenflow. Click on create.
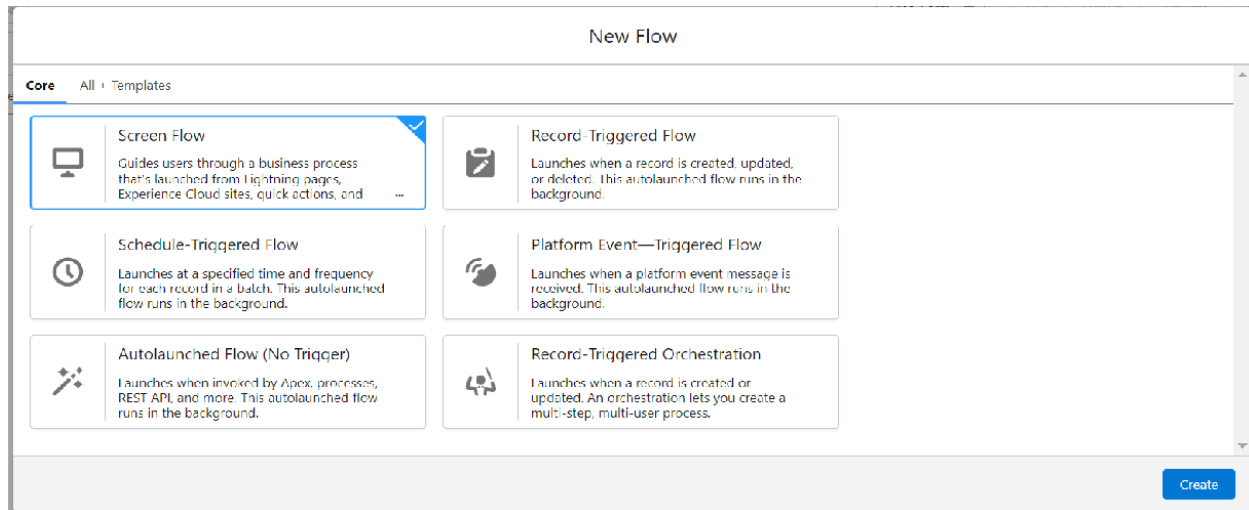
3. Click on the '+' icon in between startand end, andclick on screenelement.

4. Under the Screen
   Properties: Label : Venue
   Details

      API Name : Venue_Details

5. Now lets add components in this flow. Click on Text Component andname it as:

      Label : Venue

   NameAPI 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

Edit Screen
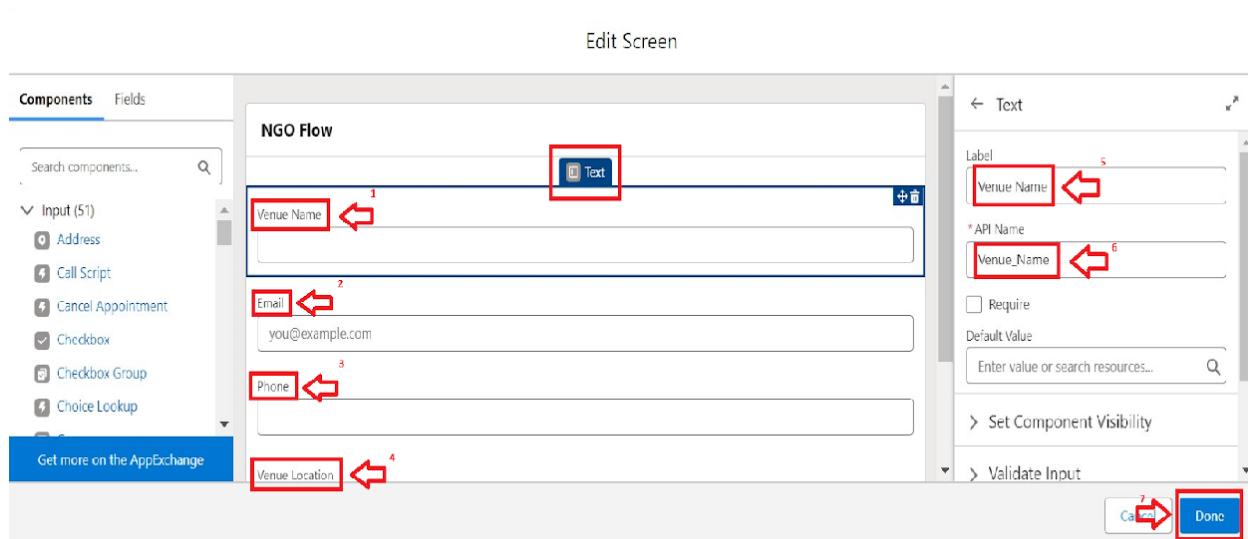
11. Click on the '+' icon in between Venue details and end, and click on create record element.

12. 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}

13. This would look like:

14. Click on Save as:

Flow Label : Venue

Form Flow API Name:

Venue_Form

Create a Record of This Object

*Object

Venue

Set Field Values for the Venue

Field		Value		
Contact_Lmail__c	←	Aa Contact Email > Value ×		🗑
Contact_Phone__c	←	Aa Contact Phone > Value ×		🗑
Name	←	Aa Venue Name ×		🗑
Venue Location__c	←	Aa location ×		🗑

What is a Trigger?

CreateTrigger,TriggerCodeTrigger:

A trigger is an Apex script that executes before or after specified

databaseevents, such as insert, update,or delete.

Create a Trigger

    a. Log into the trailheadaccount, navigate to the gear icon in the top right corner.

    b. Click on developer consoleand you will be navigatedto a new console window.

    c. Click on the File menu in the toolbar, and click on new >> Trigger.
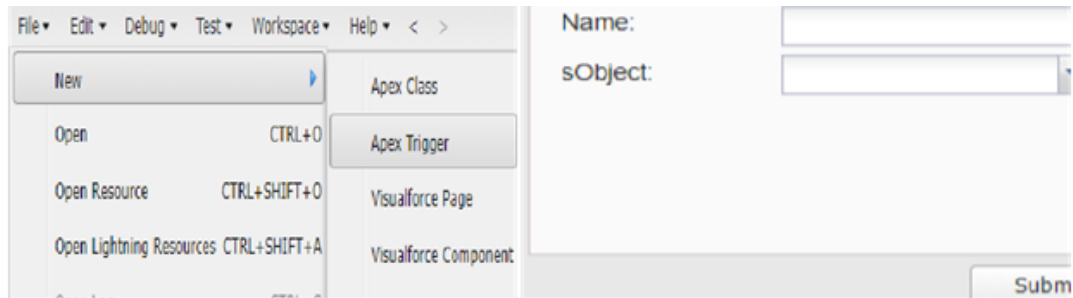
d. Enter the trigger name and the object to be triggered.

e. Enter Name: DropOffTrigger , Object: Drop-Off Point

f. Click on Submit.

Trigger Code

(This Trigger is to assign Distance field to the Distance Calculation field. Sothat we can assign the distance in the sharingrules.)

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;
    }
}
```

What are Profiles and Creation of UsersProfiles:

1. Profiles in Salesforce define a user'spermissions to performdifferent functionswithinSalesforce. Profiles controlaccess 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 besideStandard 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_FoundationAlias :
> iiksh
> Email : Give Your Email
>
> Username : mahafoundation@ mk.com (give the usernamedifferent)
>
> Nickname : Auto Populated
>
> User License : Salesforce
> PlatformProfile : NGOs Profile
> Active : Check

3. Click on Save

Creation of User2, User3

1. Create anotherTwo Users by following steps in Activity- 1 with similarUser License and Profile.
2. Give Different First Name, Last Name based on DifferentNGO's.

New User   Reset Password(s)   Add Multiple Users

	Action	Full Name ↑	Alias	Username
☐		Edit Chatter Expert	Chatter	chatty.00ddl00000920lzuai.0fcme201ss7o@chatter.salesforce.com
☐		Edit Chukka, Deekshitha	DChuk	deekshitha@project.com
☐		Edit Iksha_Foundation, Iksha Foundation	iiksh	deekshitha1@gmail.com
☐		Edit NSS, NSS	nss	deeksh1@gmail.com
☐		Edit Street_Cause, Street Cause	sstre	deekshi10@gmail.com
☐		Edit User, Integration	integ	integration@00ddl00000920lzuai.com
☐		Edit User, Security	sec	insightssecurity@00ddl00000920lzuai.com

New User   Reset Password(s)   Add Multiple Users

What are Public Groups and Creation of Public

GroupsPublicGroups:

Public Groups are collections of users that can be used to simplify the sharing of records, accesspermissions, and reportingwithin Salesforce

Creation of Public Group 1

Go to setup page >> type Public Groups in Quick Find bar >> clickon Public Groups>> click on New.
UnderGroup Information:
Label : Iksha

GroupName : Iksha

   Grant Access Using Hierarchies : Check

   i.   In Search, Select Users.

   ii.   In SelectedMembers Add IkshaFoundation and SystemAdministrator

Creation of Public Group2

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

Public Groups

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

Action	**Label** ↑	**Group Name**	**Created By**	**Created Date**
Edit	Del	Iksha	Iksha	Chukka, Deekshitha	02/08/2024, 3:03 pm
Edit	Del	NSS	NSS	Chukka, Deekshitha	02/08/2024, 3:08 pm
Edit	Del	Street Cause	Street_Cause	Chukka, Deekshitha	02/08/2024, 3:09 pm

What are Report Types and Creation of Report

TypeReport Types:

Report Types in Salesforce define the objectsand fields that are available for use in reports.Custom report typescan be created to combinedata from different objects.

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   ReportTypeName   :
Venue_with_DropOff_with_Volunteer

Description: Venue withDropOff with VolunteerStore

in   Category : Select Other Reports

Deployment Status : Deployed

      iii.   Clickon Next

      iv.   Near Click to relate another Object Select Drop-Off Points.

      v.   And also select "A" recordsmay or may not have related "B" records.

      vi.   Now again Near Click to relate another ObjectSelect Volunteers.

      vii.   Now click on Save.

Report Creation

Creation of Report on Venue with DropOff with Volunteer

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

    viii.   Click on New Folder.

            Folder Label : Custom Reports

            Folder Unique Name : CustomReports

    ix.   Open CustomReports and clickon New Report

    x.   Select Report Type : Venue with DropOff withVolunteer

    xi.   Then click on Start Report.

    xii.   In GROUP ROWS : Add VolunteerName

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

    xiv.   Now click on Save & Run.

    xv.   Give Label as :

    xvi.   Report Name : venue and Drop Off point

    xvii.   Report Unique Name : Auto Populated

    xviii.   Click on Select Folder and selectCustom Report, thenclick on Save.

Creation of Report on Volunteerswith Execution Detailsand 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 ExecutionDetails 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. Give Label as :

            Report Name : Volunteer Task

            Report Unique Name : Auto Populated

1. Click on Select Folder and select CustomReport, then clickon Save.

What are Dashboards?

Dashboards:

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

xix. Go to the app(FoodConnect) >> clickon the Dashboards tab.

xx. Click on New Folder.

Folder Label : Custom

Dashboards Folder Unique

Name : Auto Populated

xxi. Open CustomDashboards and click on New Dashboards

xxii. Name : Organization Details

xxiii. Click on Widget and select Chart or Table

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

xxv. Then click on select

xxvi. In Add Component:

Display As : Select Lightning Table

Component Theme : Select Dark

(Optional)

Add Widget

Report

| venue and Drop Off point | ⊗ |

☐ Use chart settings from report ⓘ

Display As

Y-Axis

| Volunteer Name |

X-Axis

| Sum of Distance |

Preview

venue and Drop Off point

Sum of Distance

| | 0 | 20к | 40к | 60к |

- : 56к
Bhavana : 56к
Deekshitha : 56к
SARAD : 80
SARADHA : 80
SATYA : 80

Volunteer Name

View Report (venue and Drop Off point)

Cancel   Add

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)

1. Now click on save.

Adding a Picture to the Dashboard(Optional)

(Note : To upload an 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: Task Execution Details

    Click on Select Folder and select CustomDashboards

4. Click on Select Folder and then Save.
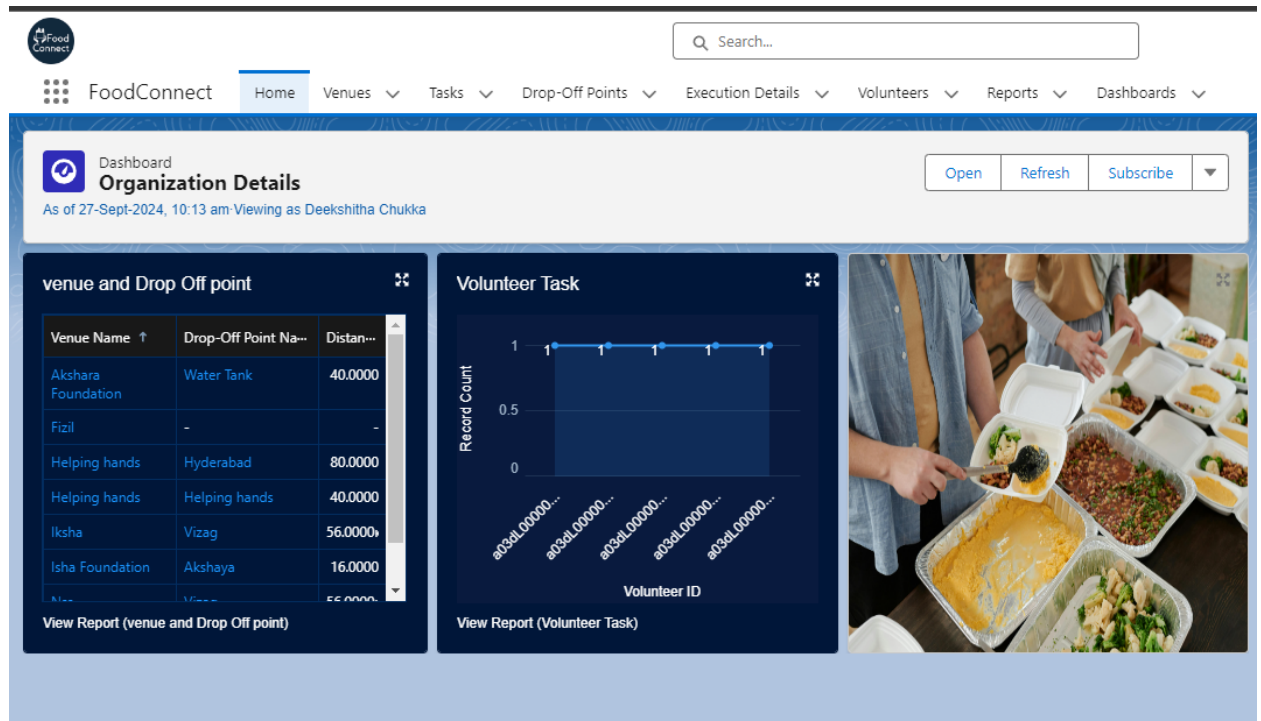
What are Sharing Rules? Creation of Sharing

Rules SharingRules:

Sharing Rules in Salesforce are used to extend the sharing

accessgranted tousers. They allow you to make automatic

exceptions to your organization-widesharing settings for defined

sets of users.

Creation of sharing rules

  xxvii. Go to setup >>type Sharing Settingsin quick find box >>Click on theSharing Settings.

  xxviii. Scroll down and find Drop-Off point Sharing Rules.

  xxix. Click on new near Drop-Off pointSharing Rules and Name it as: Label : Rule 1

Rule Name : Rule_1

xxx. Select your rule type : Select Based on criteria.

xxxi. Select which records to be shared:

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

xxxii. Select the users to share with :
Near Share With Public Groups :
Iksha

xxxiii. Click on Save.

xxxiv. Click on new near Drop-Off pointSharing Rules and
Name it as: Label : Rule 2

Rule Name : Rule_2

xxxv. Select your rule type : Select Based on criteria.

xxxvi. Select which records to be shared:

Field : Operator : Value = Distance : greater
than : 15 Field : Operator : Value = Distance :
less or equal 11.Select the users to share
with : Near Share With

Public Groups : NSS

1. Click on Save.

2. Click on new near Drop-Off pointSharing Rules and Name it as: Label :
Rule 3

RuleName : 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 With
Public Groups: 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 Creationof Home PageHome Page:

2. The Home Page in Salesforce is a customizable page that providesusers with anoverview of their tasks,calendar events, and other importantinformation.

Creation of Home Page

a. Go to setup >>type Lightning App Builder in quick find box >>Click on theLightning App Builderand Select theNew.

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, thenclick on App Default, thenAdd 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 deliveryto beneficiaries, the project effectivelytackled food insecurity and maximized the use of available resources.