



Smart  
Internz



SMARTBRIDGE  
Let's Bridge the Gap

# To Supply Leftover Food to Poor

BY

**G.ADESH**

2111cs010018@mallareddyuniversity.ac.in

# ABSTRACT:

The project, designed in Salesforce, aims to create a structured and efficient platform for redistributing leftover food to those in need. In many communities, surplus food from events, restaurants, and households goes to waste, despite high levels of food insecurity among disadvantaged populations. This Salesforce-based solution is intended to bridge this gap, streamlining the donation process while ensuring food safety and delivery efficiency.

The application leverages **Salesforce's powerful CRM** and workflow automation capabilities to manage donations, coordinate volunteers, and schedule pick-ups and deliveries. Donors, such as restaurants, event organizers, or households, can log their surplus food through a user-friendly interface, detailing the type and quantity of food and setting a pick-up time. Salesforce automation notifies volunteers about available donations and assigns them based on their location and availability, minimizing logistical complexities. The system also tracks the distance and estimated delivery time to maximize resource efficiency.

Further, the platform integrates with external applications for route optimization, ensuring faster and environmentally friendly transportation. Real-time analytics and reporting allow for continuous improvement and performance measurement, offering insights into donation frequency, waste reduction, and the program's impact on local food security. By promoting sustainable food practices, this Salesforce solution fosters a compassionate community approach to combating hunger and food waste.

<b>Mile Stones</b>		<b>Page No:</b>
<b>Object</b>	Creating a venue object Creating drop-off point object Creating task object Creating Volunteer object Creating Execution Detail Object	5 - 8
<b>Tabs</b>	Creating a custom tab Creating Remaining tabs	9
<b>The Lightning App</b>	Create a Lightning app	10 - 11
<b>Fields</b>	Creation of relationship fields in objects Creation of fields for Venue object Creation of Fields for Drop-off point object Creation of Fields for task objects Creation of Fields for Volunteer object Creation of fields for Execution Detail object	11 - 25
<b>FLOWS</b>	Create flow to create a record in Venue object	25 - 27
<b>Trigger</b>	Create a trigger Trigger Code	27 - 28
<b>Profiles</b>	Profiles	28

Creation of Users	Creation of User1 Creation of User2 and User3	29 - 30
Public Groups	Creation of Public group1 Creation of Public group2	30 - 31
Report Types	Creation of report types	31
Reports	Creation of Report on Venue with DropOff with Volunteer  Creation of Report on Volunteers with Execution Details and Tasks	31 - 33
Dashboards	Adding venue and Drop Off point Report to the Dashboard  Adding Volunteer Task Report to the Dashboard  Adding a Picture to the Dashboard (Optional)	33 - 35
Sharing Rules and Home page	Creation of sharing rules Creation of home page	35 - 37

# Creation of Objects:

## Create Venue Object:

To create an object:

1. 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
  - Record Name >> Venue Name
  - Data Type >> Text
2. Click on Allow reports and Track Field History,Allow Activities.
3. Allow search >> Save.

The screenshot displays the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the 'Venue' object is selected. The left sidebar lists various setup categories like 'Fields & Relationships', 'Page Layouts', etc. The main content area is titled 'Custom Object Definition Edit' and contains several sections: 'Custom Object Information' (with fields for Label 'Venue', Plural Label 'Venues', and Object Name 'Venue'), 'Enter Record Name Label and Format' (with Record Name 'Venue Name' and Data Type 'Text'), 'Optional Features' (with checkboxes for 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'), and 'Object Classification' (with 'Allow Sharing' checked).

## Create Drop-Off Point Object:

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
1. Enter the label name >> Drop-Off Point
2. Plural label name>> Drop-Off Points

3. Enter Record Name Label and Format
  - Record Name >> Drop-Off point Name
  - Data Type >> Text
2. Click on Allow reports and Track Field History, Allow Activities
3. Allow search >> Save.

The screenshot shows the Salesforce Setup interface for creating a custom object. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Drop-Off Point' and includes a 'Details' sidebar with links like Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, and Validation Rules.

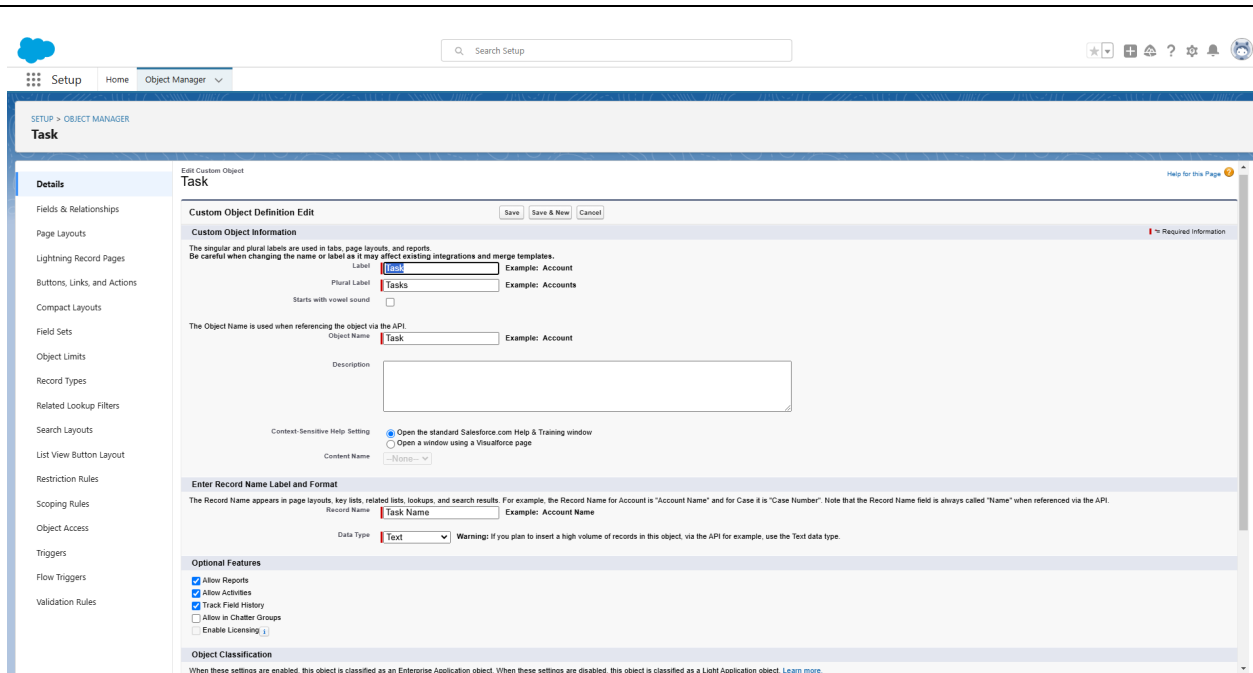
The main form is titled 'Edit Custom Object Drop-Off Point' and contains the following sections:

- Custom Object Definition Edit:** Includes 'Save', 'Save & New', and 'Cancel' buttons.
- Custom Object Information:**
  - Label:** 'Drop-Off Point' (Example: Account)
  - Plural Label:** 'Drop-Off Points' (Example: Accounts)
  - Starts with vowel sound:** ☐
  - The Object Name is used when referencing the object via the API:** 'Drop\_Off\_Point' (Example: Account)
  - Description:** A large text area.
  - Context-Sensitive Help Setting:** ☒ 'Open the standard Salesforce.com Help & Training window' and ☐ 'Open a window using a Visualforce page'.
  - Constant Name:** A dropdown menu.
- Enter Record Name Label and Format:**
  - The Record Name appears in page layouts, key lists, related lists, lookups, 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 "Name" when referenced via the API.
  - Record Name:** 'Drop-Off Point Name' (Example: Account Name)
  - Data Type:** 'Text' (Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.)
- Optional Features:**
  - ☒ Allow Reports
  - ☒ Allow Activities
  - ☒ Track Field History
  - ☐ Allow in Chatter Groups
  - ☐ Enable Licensing
- Object Classification:**

## Create Task Object:

To create an object:

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

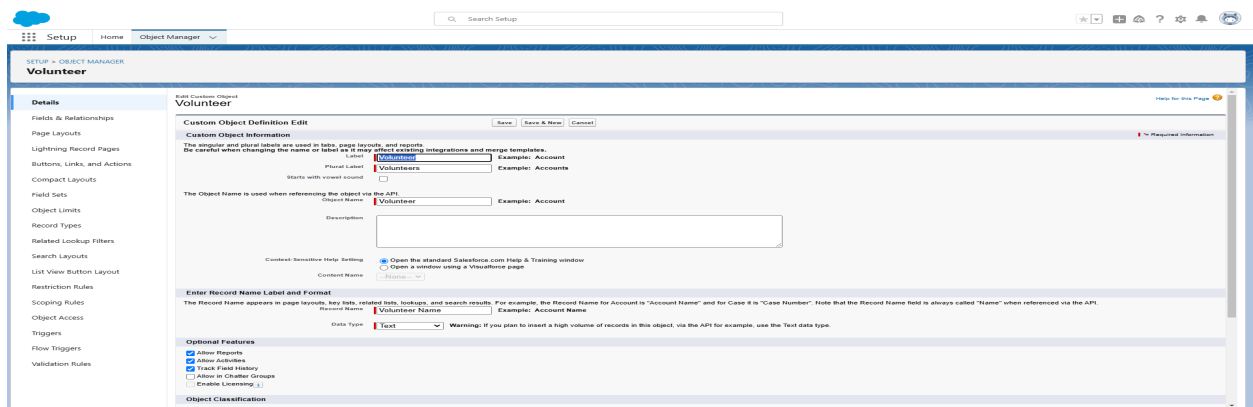


The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The 'Task' object is being edited. The 'Custom Object Definition Edit' section includes fields for Label (Task), Plural Label (Tasks), and Object Name (Task). The 'Enter Record Name Label and Format' section shows the Record Name (Task Name) and Data Type (Text). The 'Optional Features' section has checkboxes for Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups, and Enable Licensing.

## Create Volunteer Object:

To create an object:

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



The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The 'Volunteer' object is being edited. The 'Custom Object Definition Edit' section includes fields for Label (Volunteer), Plural Label (Volunteers), and Object Name (Volunteer). The 'Enter Record Name Label and Format' section shows the Record Name (Volunteer Name) and Data Type (Text). The 'Optional Features' section has checkboxes for Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups, and Enable Licensing.

## Create Execution Details Object:

To create an object:

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

The screenshot shows the Salesforce Object Manager interface for creating a custom object named 'Execution Detail'. The page is titled 'Execution Detail' and includes a sidebar with navigation options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main content area is divided into sections: 'Custom Object Information', 'Enter Record Name Label and Format', 'Optional Features', and 'Object Classification'. In the 'Custom Object Information' section, the 'Label' is set to 'Execution Detail' and the 'Plural Label' is 'Execution Details'. The 'Object Name' is 'Execution\_Detail'. In the 'Enter Record Name Label and Format' section, the 'Record Name' is 'Execution Detail Name' and the 'Data Type' is 'Text'. In the 'Optional Features' section, 'Allow Reports', 'Allow Activities', and 'Track Field History' are checked. The 'Object Classification' section at the bottom indicates that the object is classified as an Enterprise Application object when these settings are enabled.



# Creation of Tabs:

## To Create a Tab(Venue):

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom 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 include tab .
2. Make sure that the Append tab to users' existing personal customizations is checked.
3. Click save

The screenshot shows the 'Edit Custom Object Tab' page for 'Venues'. The 'Custom Tab Definition Edit' section is active. Under 'Custom Object Tab Information', the 'Tab Label' is 'Venues', the 'Object' is 'Venue', and the 'Tab Style' is 'Building'. Below this, there is a section for 'Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' with a dropdown menu set to '--None--'. There is also a 'Description' field. At the bottom, there are 'Save' and 'Cancel' buttons.

Follow the same above steps for creating other tabs. After completing it would be like this:

The screenshot shows the 'Custom Tabs' page in the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Setup' and 'Home' tabs. The main content area is titled 'Custom Tabs' and includes a 'New' button and a 'What's This?' link. Below this, there are sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Each section has a table of tabs and a 'What's This?' link.

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	Drive-Off Points	Car	
<a href="#">Edit</a>   <a href="#">Del</a>	Execution Details	Shopping Cart	
<a href="#">Edit</a>   <a href="#">Del</a>	Tasks	Shopping Cart	
<a href="#">Edit</a>   <a href="#">Del</a>	Venues	Building	
<a href="#">Edit</a>   <a href="#">Del</a>	Venues	Building	

**Web Tabs** | [New](#) | [What's This?](#)  
No Web Tabs have been defined

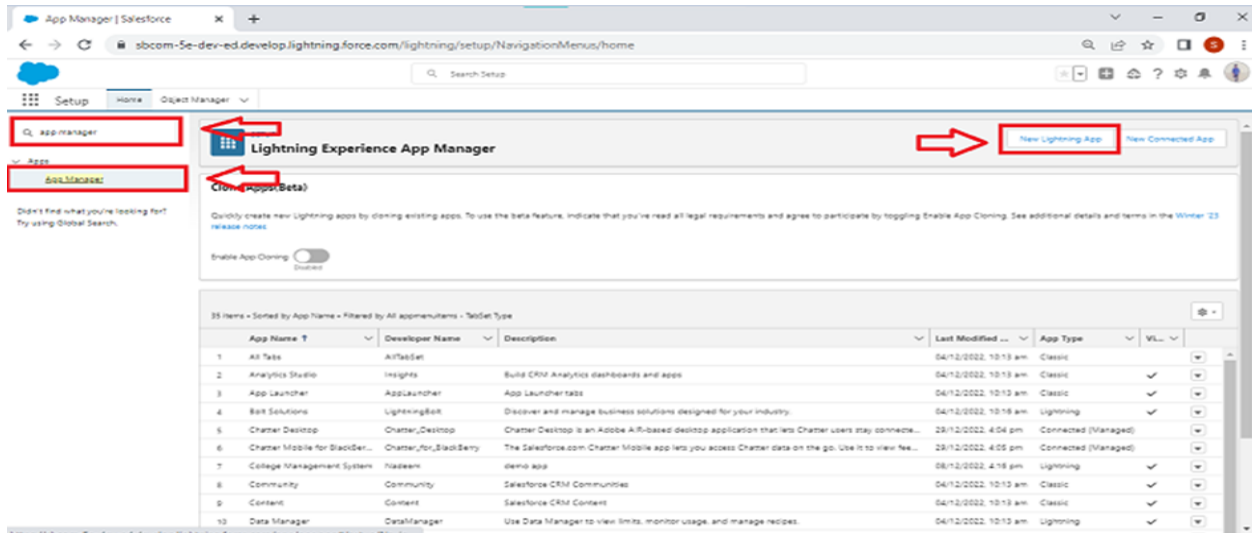
**Visualforce Tabs** | [New](#) | [What's This?](#)  
No Visualforce Tabs have been defined

**Lightning Component Tabs** | [New](#) | [What's This?](#)  
No Lightning component tabs have been defined

**Lightning Page Tabs** | [New](#) | [What's This?](#)  
No Lightning Page Tabs have been defined

# Creating a Lightning App

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

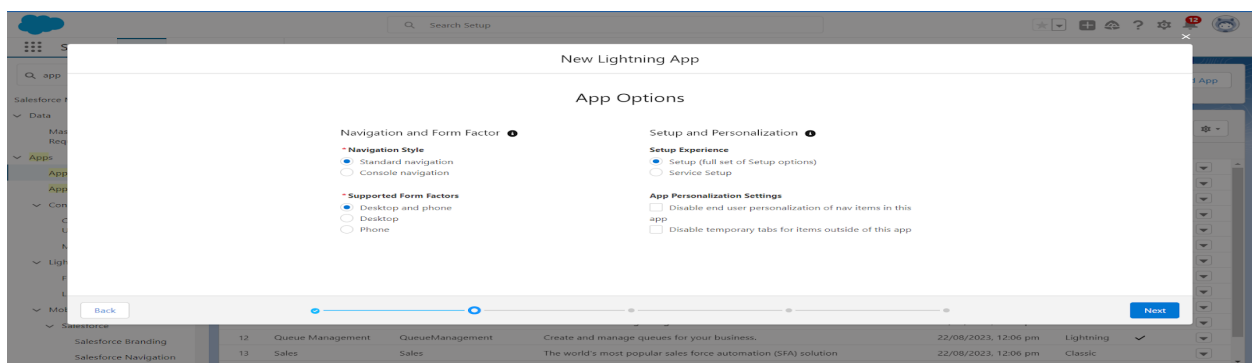


2. Fill the app name in app details and branding as follow

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.

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:

The screenshot shows a user interface for adding navigation items. On the left, under 'Available Items', there is a search bar with the placeholder text 'Type to filter list...'. Below the search bar is a list of items: Accounts, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations, Approval Requests, Asset Action Sources, and Asset Actions. On the right, under 'Selected Items', there is a list of items: Home, Venues, Tasks, Drop-Off points, Execution Details, Volunteers, Reports, and Dashboards. Between the two lists are two arrow buttons: a right-pointing arrow and a left-pointing arrow. To the right of the 'Selected Items' list are two more arrow buttons: an up-pointing arrow and a down-pointing arrow.

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

6. To Add User Profiles:

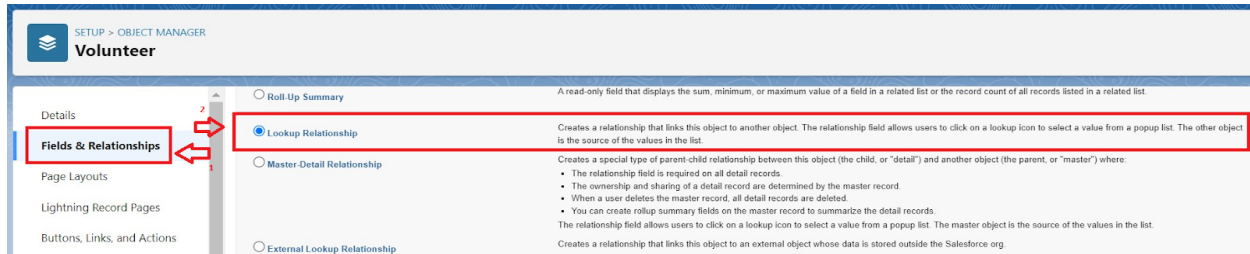
The screenshot shows a 'New Lightning App' window with a 'User Profiles' section. The section has a title 'User Profiles' and a subtitle 'Choose the user profiles that can access this app.' Below the subtitle are two panels: 'Available Profiles' and 'Selected Profiles'. In the 'Available Profiles' panel, there is a search bar with the text 'System administrator' and a right-pointing arrow button. In the 'Selected Profiles' panel, there is a list with the text 'System Administrator' and a left-pointing arrow button. At the bottom right of the window, there is a 'Save & Finish' button. Red arrows point from the search bar in 'Available Profiles' to the right-pointing arrow button, from the left-pointing arrow button to the 'System Administrator' text in 'Selected Profiles', and from the 'Save & Finish' button to the right.

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

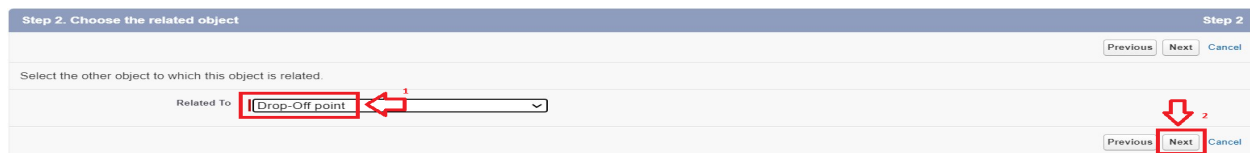
## Fields:

## Creation of Lookup Relationship Field on Volunteer Object :

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



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



5. Field Name : Drop\_Off\_point
6. Field label : Auto generated
7. Next >> Next >> Save.

### **Creation of Master Detail Relationship Field onExecution DetailsObject :**

8. Go to setup >> click on Object Manager >> type object name(Execution Details) in the search bar >> click on the object.
9. Now click on "Fields & Relationships" >> New
10. Select Master Detail relationship
11. Select the related object "Volunteer" and click next.
12. Field Name : Volunteer
13. Field label : Auto generated
14. Next >> Next >> Save.

### **Creation of Master Detail Relationship Field onExecution DetailsObject :**

15. Go to setup >> click on Object Manager >> type object name(Execution Details) in the search bar >> click on the object.
16. Now click on "Fields & Relationships" >> New
17. Select Master Detail relationship
18. Select the related object "Task" and click next.
19. Field Name : Task
20. Field label : Auto generated
21. Next >> Next >> Save.

### **Creation of Lookup Relationship Field onDrop-Off PointObject :**

22. Go to setup >> click on Object Manager >> type object name(Task) in the search bar >> click on the object.
23. Now click on "Fields & Relationships" >> New
24. Select Lookup relationship
25. Select the related object "Drop-Off Point" and click next.
26. Field Name : Venue
27. Field label : Venue\_\_c
28. Next >> Next >> Save.

#### Creation of Lookup Relationship Field onTaskObject :

29. Go to setup>> click on Object Manager >> type object name(Task) in the search bar >> click on the object.
30. Now click on "Fields & Relationships" >> New
31. Select Lookup relationship
32. Select the related object "Venue" and click next.
33. Field Name : Sponsored By
34. Field label : Auto generated
35. Next >> Next >> Save.

#### Creation of Lookup Relationship Field onTaskObject :

36. Go to setup>> click on Object Manager >> type object name(Task) in the search bar >> click on the object.
37. Now click on "Fields & Relationships" >> New
38. Select Lookup relationship
39. Select the related object "Drop-Off point" and click next.
40. Field Name : Drop-Off point
41. Field label : Auto generated
42. Next >> Next >> Save.

### **Creation of fields for the Venue 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 "Email" and Click on Next
4. 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:**

5. Go to setup >> click on Object Manager >> 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:
  - 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:**

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:
  - 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:**

9. Go to setup >> click on Object Manager >> type object name(Venue) in search bar >> click on the object.
10. Now click on “Fields & Relationships” >> New
11. Select Data type as a “Long Text Area” and Click on Next
12. 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.

2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Geolocation” and Click on Next
4. 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:

1. Go to setup >> click on Object Manager >> type object name(Drop-Off point) in search bar >> 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:
  - 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.



**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 calucation (Number) =  
`DISTANCE( Location_2__c , Venus_r.Location_c , 'km' )`

To create another fields in an object:

5. Go to setup >> click on Object Manager >> type object name(Drop-Off point) in search bar >> 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:
  - 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:

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:

- 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:

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:

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:

- 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:

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:

- 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:

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:

- 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:

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:

- 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:

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

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

19. Select Data type as a "Phone" and Click on Next

20. 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:

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

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

23. Select Data type as a "Pick List" and Click on Next

24. 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:

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

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

27. Select Data type as a "Long Text Area" and Click on Next

28. 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:**

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:
  - 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:

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:
  - 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:

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 Click on Next
8. 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:

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 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:

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:
  - 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:

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 Data type as a "Number" and Click on Next
20. 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:

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. Select Data type as a “Date” and Click on Next

28. 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:**

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:

- Field Label : Execution ID
- Field Name : gets auto generated

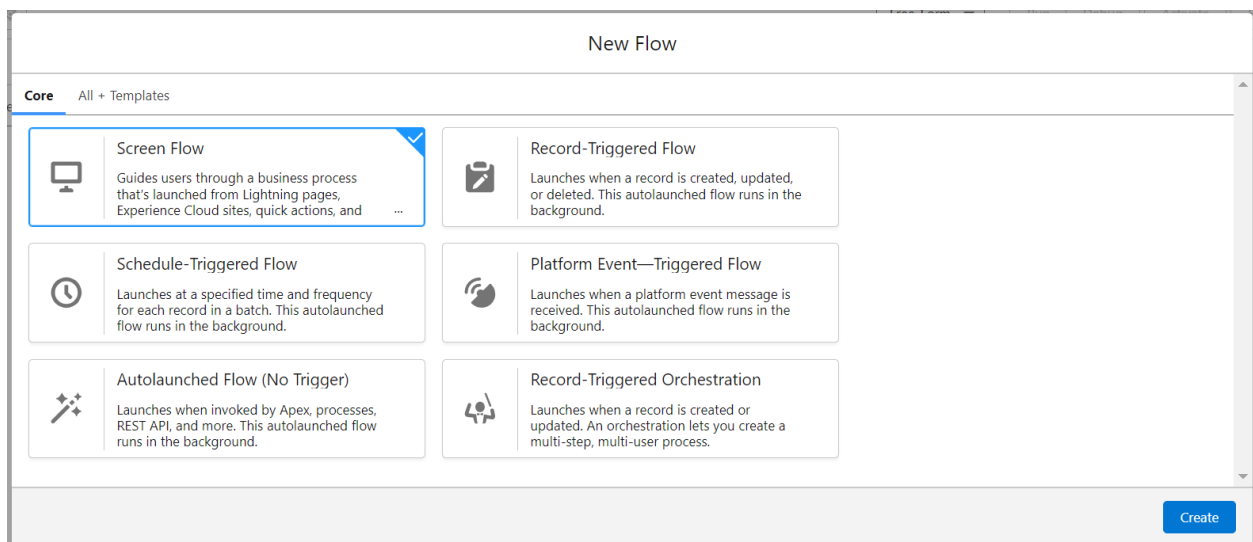


- Click on required check box
- Click on Next >> Next >> Save and new.

# Flows:

## Create Flow to create a record in Venue object:

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



3. Click on the '+' icon in between start and end, and click on screen element.
4. Under the Screen Properties:  
Label : Venue Details  
API Name : Venue\_Details
5. Now lets add components in this flow. Click on Text Component and name it as:  
Label : Venue Name  
API Name : Venue\_Name
6. Click on Email Component and name it as:  
Label : Email  
API Name : Contact\_Email
7. Click on Phone Component and name it as:  
Label : Phone

API Name : Contact\_Phone

8. Click on Text Component and name it as:

Label : Venue Location

API Name : Venue\_Location

9. Click on Number Component and name it as:

Label : Latitude

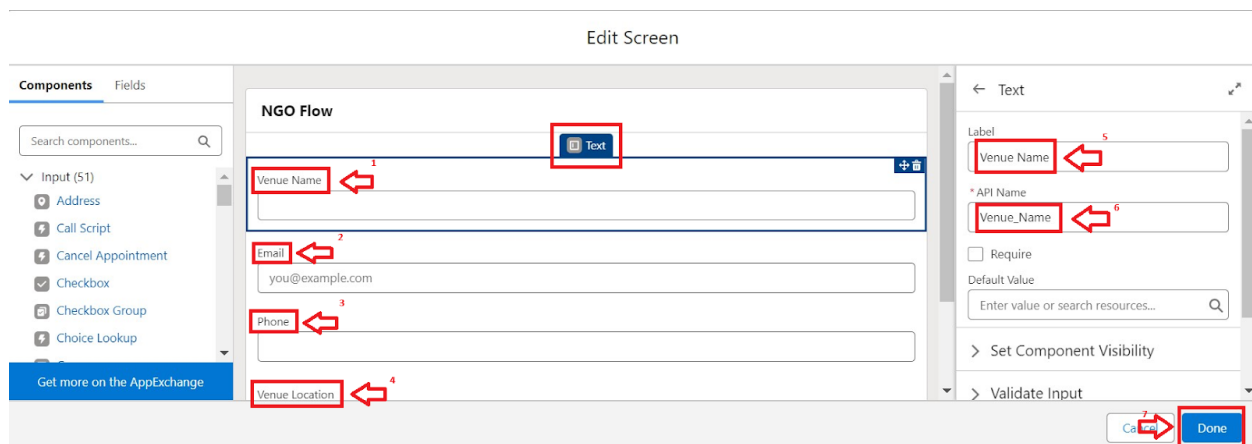
API Name : Latitude

10. Click on Number Component and name it as:

Label : longitude

API Name : longitude

11. Next click on Done. This would like below



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

13. Now label it as

Label : Create Venue Record

API Name : Create\_Venue\_Record

How Many Records to Create : One

How to Set the Record Fields : Use separate resources, and literal values

Object : Venue

Set Field Values for the Venue : Click on 'Add Field' 5 times

Field : Value = Contact\_Email\_\_c : {!Contact\_Email.value}

Field : Value = Contact\_Phone\_\_c : {!Contact\_Phone.value}

Field : Value = Name : {!Venue\_Name}

Field : Value = Venue\_Location\_\_c : {!location}

Field : Value = Location\_\_Latitude\_\_s : {!latitude}

Field : Value = Location\_\_Longitude\_\_s : {!longitude}

14. This would look like:

---

Create a Record of This Object

\* Object  
Venue

---

Set Field Values for the Venue

Field Contact_Email__c	←	Value Aa Contact_Email > Value ×	🗑️
Field Contact_Phone__c	←	Value Aa Contact_Phone > Value ×	🗑️
Field Name	←	Value Aa Venue_Name ×	🗑️
Field Venue_Location__c	←	Value Aa location ×	🗑️

15. Click on Save as:

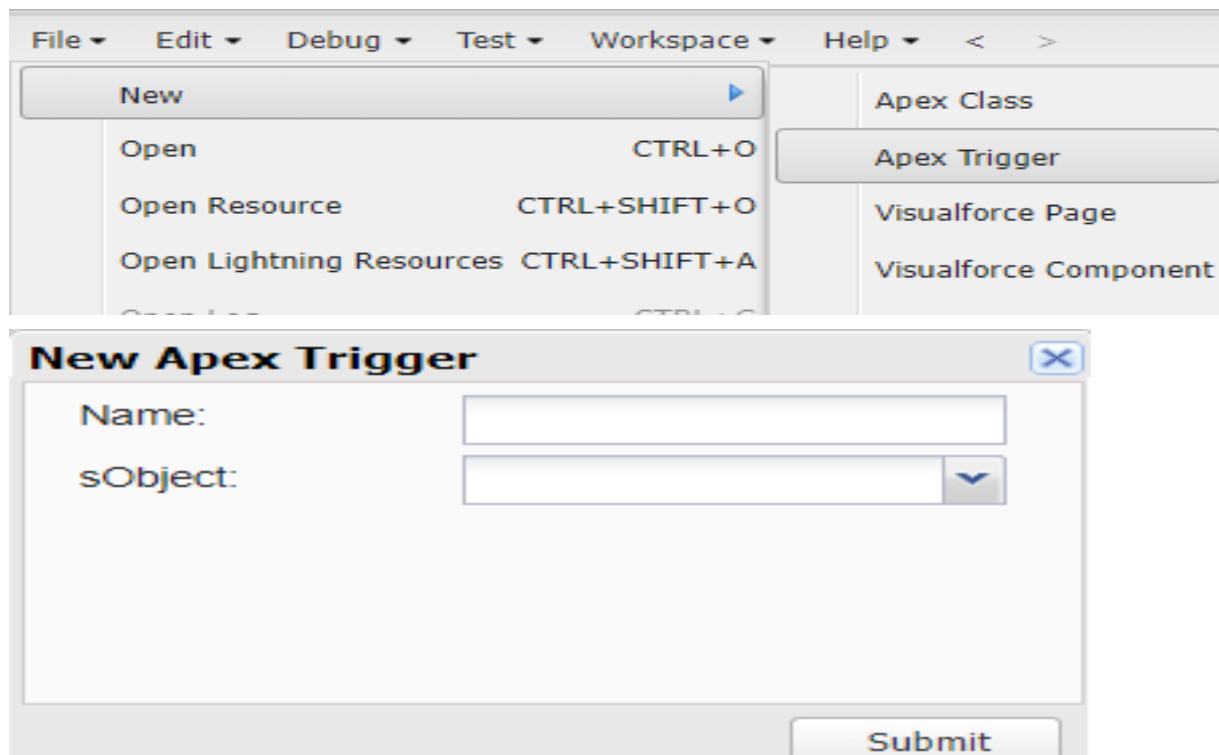
Flow Label : Venue Form

Flow API Name : Venue\_Form

# Trigger

## Create a Trigger

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



5. Enter Name : DropOffTrigger  
sObject: Drop-Off Point
6. 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;  
    }  
}
```

# 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
1. Then click on Save

# Creation of Users

## 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 : Give Your Email  
Username : [ikshafoundation@sb.com](mailto: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
Last Name	Iksha_Foundation
Alias	iksh
Email	bhargavipaila1023@gmail.c
Username	ikshafoundation@sb.com
Nickname	User1711437164226559933
Title	
Company	
Department	
Division	
Role	<None Specified>
User License	Salesforce Platform
Profile	NGOs Profile
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>

3. Click on Save
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.

	<a href="#">Edit</a>   <a href="#">Login</a>	<a href="#">Iksha_Foundation, Iksha Foundation</a>	<a href="#">iksh</a>	<a href="#">ikshafoundation@sb.com</a>		<a href="#">NGOs Profile</a>
	<a href="#">Edit</a>   <a href="#">Login</a>	<a href="#">NSS, NSS</a>	<a href="#">nnss</a>	<a href="#">nss@sb.com</a>		<a href="#">NGOs Profile</a>
	<a href="#">Edit</a>   <a href="#">Login</a>	<a href="#">Street_Cause, Street Cause</a>	<a href="#">sstre</a>	<a href="#">streetcause@sb.com</a>		<a href="#">NGOs Profile</a>

## Public Groups

### Creation of Public Group 1

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

### Creation of Public Group 2

1. By Following Steps in Activity 1, Create other two Public Groups for other two users.
2. After Saving this would look like this.

New				
Action	Label ↑	Group Name	Created By	Created Date
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Iksha</a>	<a href="#">Iksha</a>	<a href="#">Bhargavi_Palla</a>	26/03/2024, 2:27 pm
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">NSS</a>	<a href="#">NSS</a>	<a href="#">Bhargavi_Palla</a>	26/03/2024, 2:27 pm
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Street_Cause</a>	<a href="#">Street_Cause</a>	<a href="#">Bhargavi_Palla</a>	26/03/2024, 2:26 pm

# Report Types

## 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:  
 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
3. Click on Next
4. Near Click to relate another Object Select Drop-Off Points.
5. And also select "A" records may or may not have related "B" records.
6. Now again Near Click to relate another Object Select Volunteers.
7. Now click on Save.

# Reports

## Creation of Report on Venue with DropOff with Volunteer

1. Go to the app(FoodConnect) >> click on the reports tab
2. Click on New Folder.  
 Folder Label : Custom Reports  
 Folder Unique Name : CustomReports
3. Open Custom Reports and click on New Report
4. Select Report Type : Venue with DropOff with Volunteer

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

**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			6,936.3488
Total (4)			6,936.3488

8. Now click on Save & Run.
9. Give Label as :
10. Report Name : venue and Drop Off point
11. Report Unique Name : Auto Populated
12. Click on Select Folder and select Custom Report, then click on Save.

## Creation of Report on Volunteers with Execution Details and Tasks

1. Go to the app(FoodConnect) >> click on the reports tab
2. Click on Custom Reports Folder and click on New Report
3. Select Report Type : Volunteers with Execution Details and Tasks.
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.



**REPORT** ▾

Volunteer Task **Volunteers with Execution Details and Tasks**

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically ☒

Volunteer ID	Volunteer: Volunteer Name	Task: Task Name	Execution Detail: Execution Detail Name	Volunteer: Owner Name	Task: Date	Task: Rating
2 (1)	Charan	Task 2	Execution 2	Iksha Foundation Iksha_Foundation	28/03/2024	5
<b>Subtotal</b>						
4 (1)	Bhavika	Task 1	Execution 1	Iksha Foundation Iksha_Foundation	28/03/2024	4
<b>Subtotal</b>						
<b>Total (2)</b>						

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒

7. Now click on Save & Run.

8. Give Label as :

Report Name : Volunteer Task

Report Unique Name : Auto Populated

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

# Dashboards

## 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 Dashboards

Folder Unique Name : Auto Populated

3. Open Custom Dashboards and click on New Dashboards

4. Name : Organization Details

5. Click on Widget and select Chart or Table

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

7. Then click on select

8. In Add Component:

Display As : Select Lightning Table

Component Theme : Select Dark (Optional)

#### Report

venue and Drop Off point

☐ Use chart settings from report

#### Display As



#### Groups

Add group...

#### Columns

#### Preview

##### venue and Drop Off point

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	-	-

[View Report \(venue and Drop Off point\)](#)

1. Now click on save.

## Adding Volunteer Task Report to the Dashboard

1. Click on Widget and select Chart or Table
2. In Select Report : Select Volunteer Task Report.
3. Then click on select
4. In Add Component:

Display As : Select Line Chart

Component Theme : Select Dark (Optional)

#### Report

Volunteer Task

☐ Use chart settings from report

#### Display As



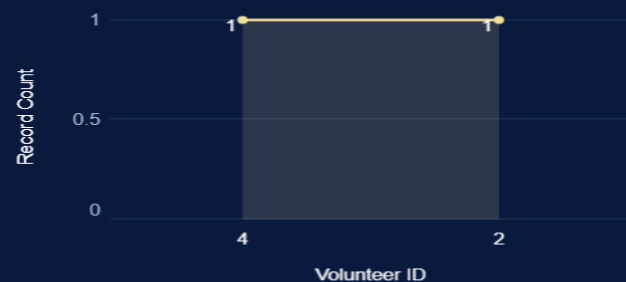
#### X-Axis

Volunteer ID

#### Y-Axis

#### Preview

##### Volunteer Task



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

1. Now click on save.

## Adding a Picture to the Dashboard (Optional)

(Note : To upload an image into the Dashboard, we have to first download an image

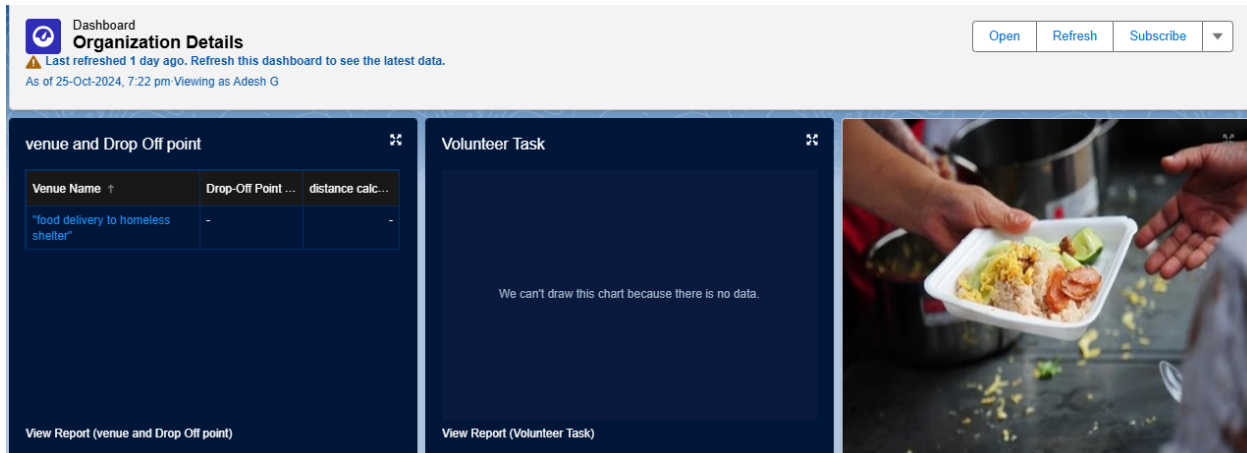
from google or other sources into your system)

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

Name : Task Execution Details

Click on Select Folder and select Custom Dashboards

4. Click on Select Folder and then Save.



## Sharing Rules

### Creation of sharing rules

1. Go to setup >> type Sharing Settings in quick find box >> Click on the Sharing Settings.
2. Scroll down and find Drop-Off point Sharing Rules.
3. Click on new near Drop-Off point Sharing Rules and Name it as:  
Label : Rule 1  
Rule Name : Rule\_1
4. Select your rule type : Select Based on criteria.
5. Select which records to be shared:  
Field : Operator : Value = Distance : less than : 15
6. Select the users to share with : Near Share With  
Public Groups : Iksha
7. Click on Save.
8. Click on new near Drop-Off point Sharing Rules and Name it as:

Label : Rule 2

Rule Name : Rule\_2

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

10. Select which records to be shared:

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

Field : Operator : Value = Distance : less or equal : 30

11. Select the users to share with : Near Share With

Public Groups : NSS

12. Click on Save.

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

Label : Rule 3

Rule Name : Rule\_3

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

15. Select which records to be shared:

Field : Operator : Value = Distance : greater than : 30

Field : Operator : Value = Distance : less or equal : 50

16. Select the users to share with : Near Share With

Public Groups : Street Cause

17. Click on Save.

Drop-Off point Sharing Rules		New	Recalculate	Drop-Off point Sharing Rules Help ?	
Action	Criteria	Shared With		Access Level	
<a href="#">Edit</a>   <a href="#">Del</a>	Drop-Off point: Distance LESS OR EQUAL 15	<a href="#">Group: Iksha</a>		Read/Write	
<a href="#">Edit</a>   <a href="#">Del</a>	(Drop-Off point: Distance GREATER THAN 15) AND (Drop-Off point: Distance LESS OR EQUAL 30)	<a href="#">Group: NSS</a>		Read/Write	
<a href="#">Edit</a>   <a href="#">Del</a>	(Drop-Off point: Distance GREATER THAN 30) AND (Drop-Off point: Distance LESS OR EQUAL 50)	<a href="#">Group: Street Cause</a>		Read/Write	

# Home Page

## Creation of Home Page

1. Go to setup >> type Lightning App Builder in quick find box >> Click on the Lightning App Builder and Select the New.
2. Select Home Page and give Label as HOME Page.
3. Select Standard Home Page.
4. Near Components search for Flow and Drag and Drop in Right Side Section..

5. On the right hand side:

Flow : Venue Flow

6. Near Components search for Dashboard, then Drag and Drop it in first Section.
7. Click on Save and Activation, then click on App Default, then Add Assignments.
8. Add FoodConnect App and then Save.
9. FoodConnect Home Page would Look Like this.

The screenshot displays the FoodConnect dashboard interface. At the top, there is a navigation bar with the FoodConnect logo, a search bar, and several menu items: Home, Venues, Drop-Off Points, Tasks, Volunteers, Execution Details, and Reports. Below the navigation bar, the dashboard is divided into several sections. On the left, there is a 'Dashboard' section with 'Organization Details' and a 'Venue and Drop Off point' table. The 'Venue and Drop Off point' table has columns for Venue Name, Drop-Off Point, and distance calc. Below the table, there is a 'View Report (venue and Drop Off point)' button. In the center, there is a 'Volunteer Task' section with a message 'We can't draw this chart because there is no data.' and a 'View Report (Volunteer Task)' button. On the right, there is a 'Venue Form' section with input fields for Venue Name, Email, Phone, Venue Location, Latitude, and Longitude, and a 'Next' button. The dashboard also features a 'Dashboard' section with 'Organization Details' and a 'Venue and Drop Off point' table.

FoodConnect Home Venues Drop-Off Points Tasks Volunteers Execution Details Reports

Search...

Dashboard Organization Details

Last refreshed 1 day ago. Refresh this dashboard to see the latest data.

As of 25-Oct-2024, 7:22 pm Viewing as Adesh G

Open Refresh Subscribe

venue and Drop Off point

Venue Name	Drop-Off Point	distance calc.
"Food delivery to homeless shelter"	-	-

View Report (venue and Drop Off point)

Volunteer Task

We can't draw this chart because there is no data.

View Report (Volunteer Task)

Venue Form

Venue Name

Email

you@example.com

Phone

Venue Location

Latitude

Longitude

Next