

9) Users

What is a User?

Users are individuals who have login access to the Salesforce organization. Each user has a unique username, profile, and role, determining their access levels and permissions within the system.

Iksha Foundation Iks

Project Title Project to Supply Leftover Food to the Poor Using Salesforce

Submitted by

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1. Project Overview

This project addresses the challenge of food waste and hunger by leveraging Salesforce technology to facilitate the distribution of surplus food to those in need. Through this solution, we aim to efficiently connect donors, such as restaurants and grocery stores, with organizations that assist the needy. Utilizing Salesforce CRM as the core platform, the project enables real-time tracking of donations, manages logistics, and ensures timely delivery. This initiative promotes transparency, accountability, and improved resource allocation within the network of food donors and recipients.

1. Objectives

- a. **Business Goals:** Reduce food waste and combat hunger by connecting food suppliers with non-profits and shelters.



b. Specific Outcomes:

- Establish a reliable network of food donors and recipients.
- Automate the matching process of food donations based on location, food type, and urgency.
 - Enable field agents to track deliveries and update statuses in real-time.

1. Salesforce Key Features and Concepts Utilized

- a. **Objects:** Custom objects created for Drop-Off Points, Tasks, Execution Details, Volunteers, and Venues to manage data specific to the project.
- b. **Tabs:** Custom tabs for key objects like Venues, Execution Details, and Volunteers, improving data organization and accessibility.
- c. **Lightning App:** Built for a smooth and user-friendly interface.
- d. **Fields:** Custom fields for storing detailed information about tasks, volunteer details, and drop-off points.
- a. **Flows:** Automated workflows for creating records and notifying users.
- b. **Triggers:** Apex triggers to enforce business logic and ensure data consistency.
- c. **Profiles and Users:** Defined specific roles and access levels to secure and organize data handling.
- d. **Public Groups:** Grouped users for simpler sharing and permissions management.
- e. **Report Types:** Created to facilitate custom reporting and track metrics like volunteer efficiency and food distribution effectiveness.
- f. **Dashboards:** Visual representation of key metrics, enabling better decision-



making and operational insights.



- g. **Sharing Rules:** Used to extend access to records for users in public groups, ensuring secure and organized data sharing across the system.

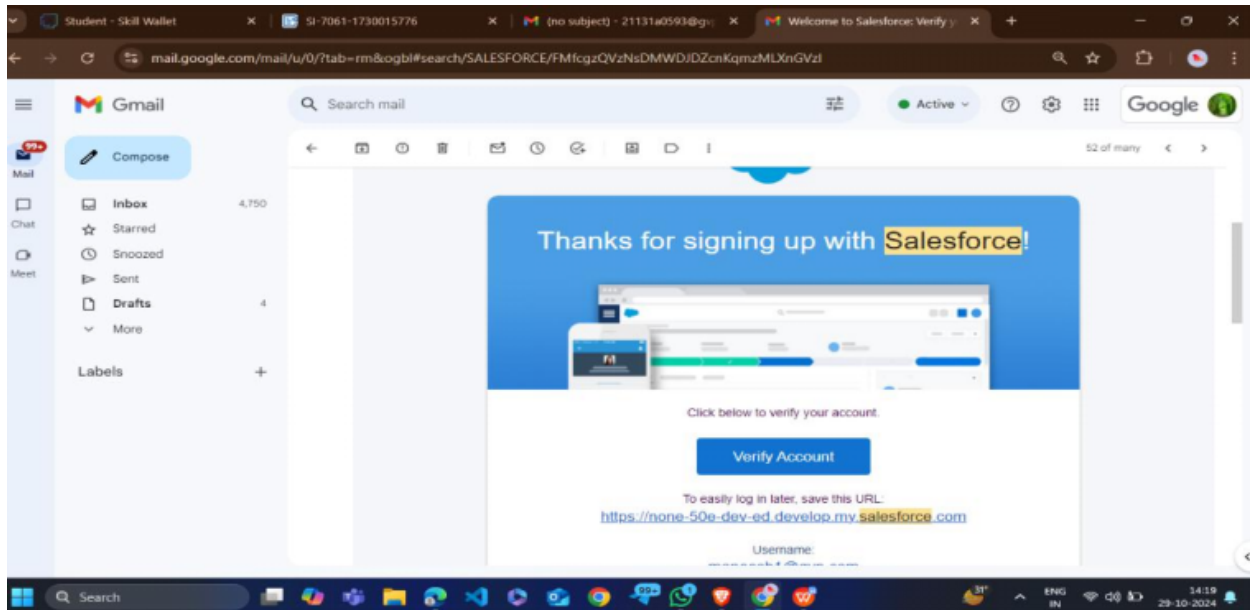
2. Detailed Steps to Solution Design

The solution design involved creating custom objects, fields, tabs, and lightning applications to build a user-friendly interface. Each object was carefully tailored to meet the unique data requirements for the project:

1. **Data Model:** Custom objects (Drop-Off Points, Volunteers, etc.) organized data effectively, while relationships between objects streamlined the distribution workflow.
2. **User Interface:** Custom tabs and Lightning components facilitated easy access to information, optimized for mobile use.
3. **Business Logic:** Flows and triggers automated donation alerts, assignment of volunteers, and tracking of delivery updates to ensure a smooth process.

salesforce developer account creation

1. Creating a developer org in salesforce
1. Account Activation



Object

In Salesforce, an object is a database table that stores data related to a specific entity, such as customers, products, or sales transactions. Objects are the building blocks of Salesforce data models.

There are two types of objects in Salesforce:

1. **Standard Objects:** These are pre-built objects provided by Salesforce, such as Accounts, Contacts, Leads, and Opportunities, which cover common business processes.
2. **Custom Objects:** These are user-defined objects created to store data unique to a particular business or application. Custom objects can have custom fields, relationships, and custom logic through workflows and triggers.

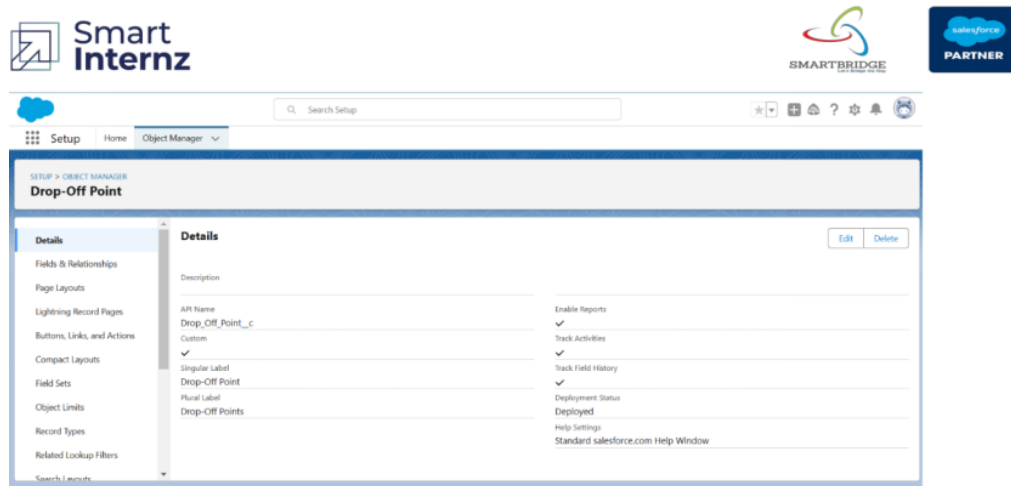
Objects are essential for organizing and managing data within the Salesforce platform.



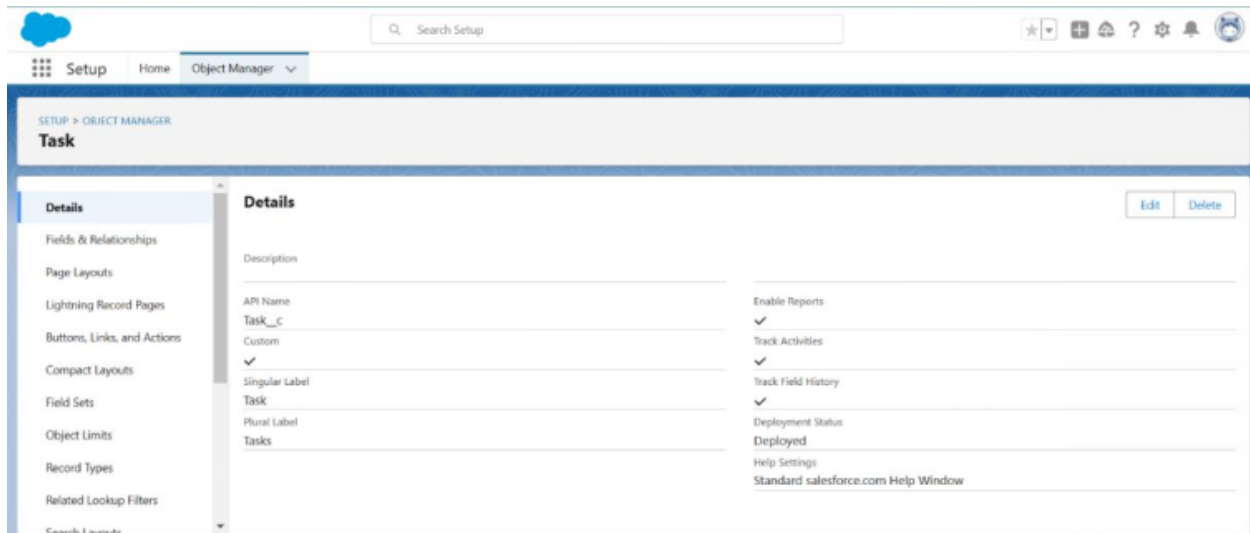
To create an object:

Here, We have Created All the objects which where asked.


a. Drop-Off Point



b. Task



c. Execution Detail



Setup Home Object Manager

SETUP > OBJECT MANAGER
Execution Detail

Details
 Fields & Relationships
 Page Layouts
 Lightning Record Pages
 Buttons, Links, and Actions
 Compact Layouts
 Field Sets
 Object Limits
 Record Types
 Related Lookup Filters
 Search Layouts


Details

Edit Delete

Description
 API Name
 Execution_Detail__c
 Custom
 Singular Label
 Execution Detail
 Plural Label
 Execution Details

Enable Reports
 Track Activities
 Track Field History
 Deployment Status
 Deployed
 Help Settings
 Standard salesforce.com Help Window

d. Volunteer



Setup Home Object Manager

SETUP > OBJECT MANAGER
Volunteer

Details
 Fields & Relationships
 Page Layouts
 Lightning Record Pages
 Buttons, Links, and Actions
 Compact Layouts
 Field Sets
 Object Limits
 Record Types
 Related Lookup Filters
 Search Layouts

Details

Edit Delete

Description
 API Name
 Volunteer__c
 Custom
 Singular Label
 Volunteer
 Plural Label
 Volunteers

Enable Reports
 Track Activities
 Track Field History
 Deployment Status
 Deployed
 Help Settings
 Standard salesforce.com Help Window

e. Venue



Tab:

What is Tab ?

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

a. Creating a Custom

Tab Create Venues

Tab

Drop-Off Point Tab



II) Execution Details Tab

III) Venues Tab

IV) Volunteers Tab



IV) Volunteers Tab

4. Create a Lightning App

Will create a lightning app page-



5)Fields

What is a Field?

Fields are specific data points within an object where individual pieces of information are stored. They are akin to columns in a database table and can hold various types of data, such as text, numbers, or dates.

Creation of Fields for the Volunteer Object - Gender

Execution ID



Date of birth

Addresss



Age



Avaialble On

Drop_off_point



Creation of Fields for the Venue Object

Contact Email



Contact Phone

Location



Venue Location

Location



distance Calculation

Creation of Fields for the Task Object

Venue_c



Feedback

Rating




Sponsored By

Task Name



Task ID

Phone



Setup Home Object Manager

SETUP > OBJECT MANAGER
Task

Details
Fields & Relationships
 Page Layouts
 Lightning Record Pages
 Buttons, Links, and Actions
 Compact Layouts
 Field Sets
 Object Limits
 Record Types
 Related Lookup Filters

Task Custom Field
Phone
[Back to Task](#)


[Validation Rules \(0\)](#)

Custom Field Definition Detail
 [Edit](#)
[Set Field-Level Security](#)
[View Field Accessibility](#)
[Where is this used?](#)

Field Information

Field Label	Phone	Object Name	Task
Field Name	Phone	Data Type	Phone
API Name	Phone__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH 26/10/2024, 9:54 pm	Modified By	KEMBURU VENKAT MANEESH 26/10/2024, 9:54 pm

Number of People Served



Setup Home Object Manager

SETUP > OBJECT MANAGER
Task

Details
Fields & Relationships
 Page Layouts
 Lightning Record Pages
 Buttons, Links, and Actions
 Compact Layouts
 Field Sets
 Object Limits
 Record Types
 Related Lookup Filters

Task Custom Field
Number of People Served
[Back to Task](#)

[Validation Rules \(0\)](#)

Custom Field Definition Detail
 [Edit](#)
[Set Field-Level Security](#)
[View Field Accessibility](#)
[Where is this used?](#)


Field Information



Field Label	Number of People Served	Object Name	Task
Field Name	Number_of_People_Served	Data Type	Number
API Name	Number_of_People_Served__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH 26/10/2024, 9:52 pm	Modified By	KEMBURU VENKAT MANEESH 26/10/2024, 9:52 pm


Date








Creation of Fields for the Execution Details Object Volunteer

Task





Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Execution Detail

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Execution Detail Custom Field

Task

Back to Execution Detail

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

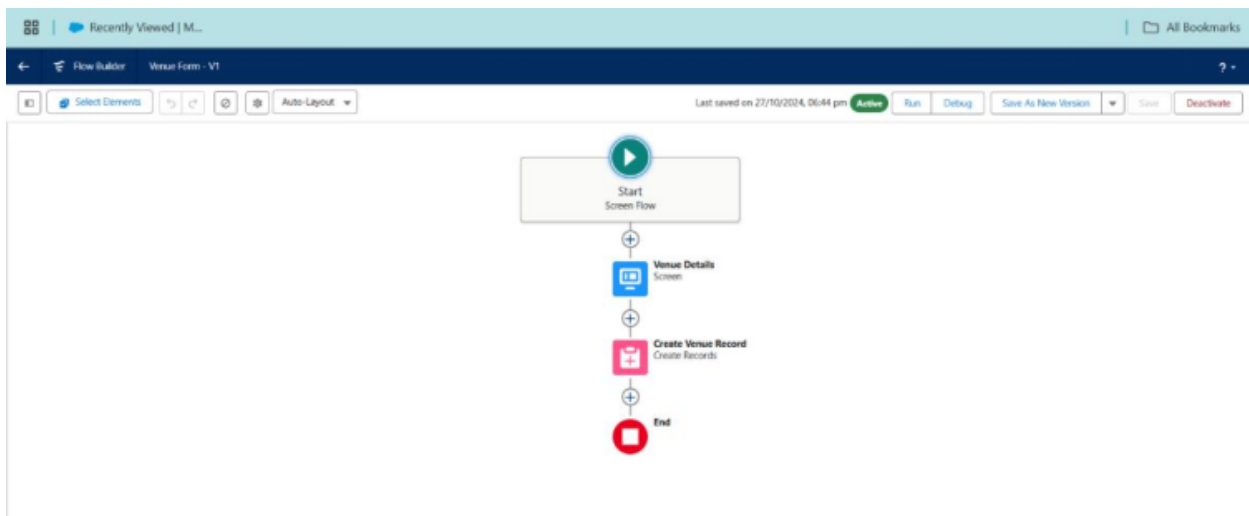
Field Label	Task	Object Name	Execution Detail
Field Name	Task	Data Type	Master-Detail
API Name	Task_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBRU VENKAT MANEESH	26/10/2024, 4:16 pm	Modified By
			KEMBRU VENKAT MANEESH
			26/10/2024, 4:16 pm

6) Flows

What is a Flow?

Flows are automation tools that allow users to create complex business processes and workflows using a visual interface. They can automate tasks, guide users through steps, and integrate with other systems.

Flow to Create a Record in Venue Object



7) Trigger

What is a Trigger?

A trigger is a piece of Apex code that executes before or after specific database events on objects, such as insertions, updates, or deletions. Triggers are used to perform custom actions or enforce business rules.


Trigger Code








```
1 trigger DropOffTrigger on Drop_Off_point__c (before insert) {  
2  
3     for(Drop_Off_point__c Drop : Trigger.new){  
4  
5         Drop.Distance__c = Drop.distance_calculation__c;  
6  
7     }  
8  
9 }
```


8) Profiles

What is a Profile?

Profiles define a user's permissions and access settings, controlling what users can see and do within the application. They specify the objects, fields, and functions a user can access.




Setup


Home

Object Manager

Users

Profiles

Didn't find what you're looking for?
 Try using Global Search.


Profiles

Profile
NGOs Profile

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.
 If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

Profile Detail

Edit Clone Delete View Users

Name	NGOs Profile		
User License	Salesforce Platform	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	KEMBURU VENKAT MANEESH, 27/10/2024, 8:13 am	Modified By	KEMBURU VENKAT MANEESH, 27/10/2024, 9:46 am

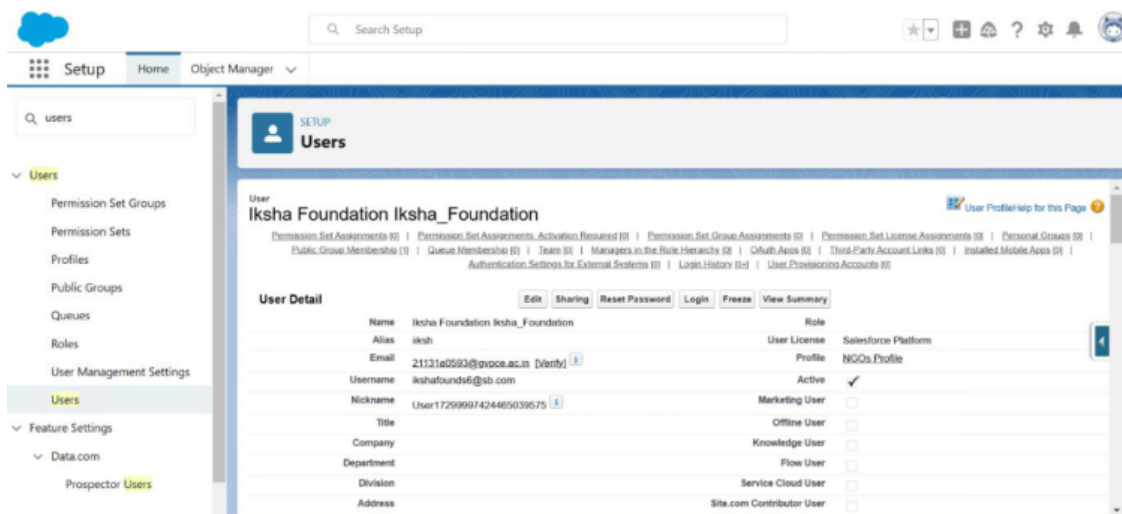
Page Layouts
 Standard Object Layouts

9) Users

What is a User?

Users are individuals who have login access to the Salesforce organization. Each user has a unique username, profile, and role, determining their access levels and permissions within the system.

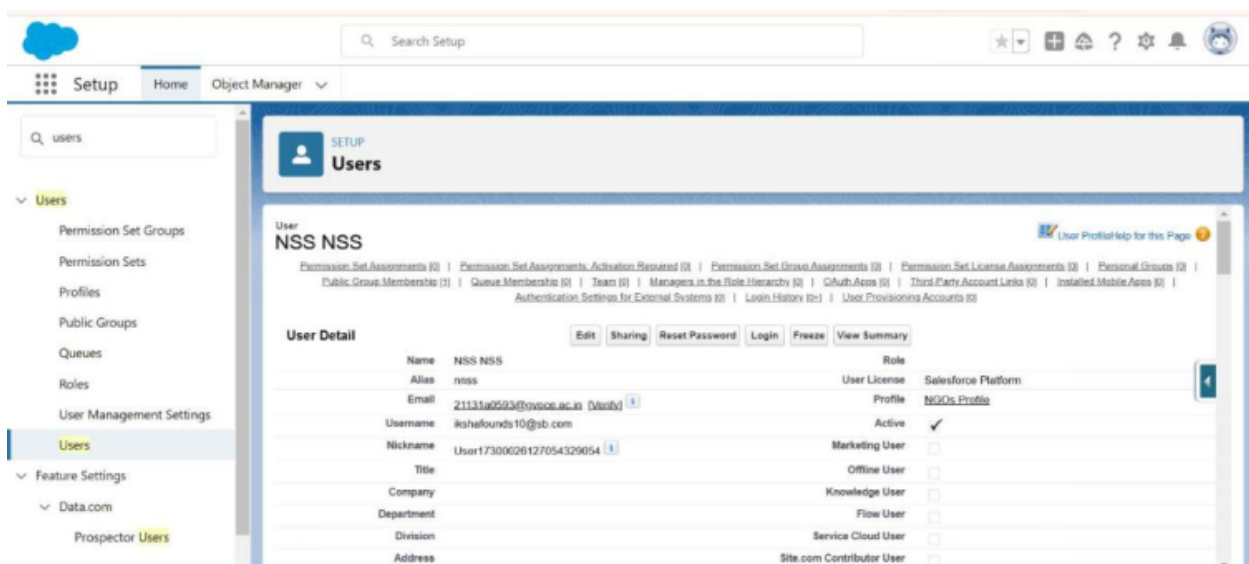
Iksha Foundation Iksha



The screenshot shows the Salesforce Setup page for a user named 'Iksha Foundation Iksha_Foundation'. The left sidebar shows the 'Users' section under 'Setup'. The main content area displays the user's details, including Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, and Address. The user is active and has the role of 'Marketing User'.

User Detail		Role	User License	Profile	Active
Name	Iksha Foundation Iksha_Foundation		Salesforce Platform	NGOs Profile	<input checked="" type="checkbox"/>
Alias	iksh				
Email	21131a0593@gpoco.ac.in [Verify]				
Username	ikshafound6@sb.com				
Nickname	User1729997424465039575	Marketing User			<input checked="" type="checkbox"/>
Title		Offline User			<input type="checkbox"/>
Company		Knowledge User			<input type="checkbox"/>
Department		Flow User			<input type="checkbox"/>
Division		Service Cloud User			<input type="checkbox"/>
Address		Site.com Contributor User			<input type="checkbox"/>




NSS




The screenshot shows the Salesforce Setup page for a user named 'NSS NSS'. The left sidebar shows the 'Users' section under 'Setup'. The main content area displays the user's details, including Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, and Address. The user is active and has the role of 'Marketing User'.

User Detail		Role	User License	Profile	Active
Name	NSS NSS		Salesforce Platform	NGOs Profile	<input checked="" type="checkbox"/>
Alias	nss				
Email	21131a0593@gpoco.ac.in [Verify]				
Username	ikshafound10@sb.com				
Nickname	User17300026127054329054	Marketing User			<input checked="" type="checkbox"/>
Title		Offline User			<input type="checkbox"/>
Company		Knowledge User			<input type="checkbox"/>
Department		Flow User			<input type="checkbox"/>
Division		Service Cloud User			<input type="checkbox"/>
Address		Site.com Contributor User			<input type="checkbox"/>


Street Cause








[Setup](#)
[Home](#)
[Object Manager](#)

- Users
 - Permission Set Groups
 - Permission Sets
 - Profiles
 - Public Groups
 - Queues
 - Roles
 - User Management Settings
 - Users**
- Feature Settings
 - Data.com
 - Prospector **Users**


Users


User

Street Cause Street Cause

[Permission Set Assignments \(0\)](#) | [Permission Set Assignments Activation History \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Personal Users \(0\)](#) | [Public Group Memberships \(0\)](#) | [Queue Memberships \(0\)](#) | [Teams \(0\)](#) | [Managers in the Role Hierarchy \(0\)](#) | [Child Apps \(0\)](#) | [Third Party Account Links \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(0\)](#) | [User Provisioning Accounts \(0\)](#)

User Detail
[Edit](#)
[Sharing](#)
[Reset Password](#)
[Login](#)
[Freeze](#)
[View Summary](#)


Name	Street Cause Street Cause			Role	
Alias	scsb			User License	Salesforce Platform
Email	21131a0593@pvtco.ac.in [Verify]			Profile	NGOs Profile
Username	iksha@found30@sb.com			Active	<input checked="" type="checkbox"/>
Nickname	User1730002879314702459 [1]			Marketing User	<input type="checkbox"/>
Title				Offline User	<input type="checkbox"/>
Company				Knowledge User	<input type="checkbox"/>
Department				Flow User	<input type="checkbox"/>
Division				Service Cloud User	<input type="checkbox"/>
Address				Site.com Contributor User	<input type="checkbox"/>

10) Public Groups

What is a Public Groups?


Public groups are collections of users, roles, and other groups that can be used to simplify sharing rules and access settings. They help manage data visibility and permissions across multiple users.


Iksha



[Setup](#)
[Home](#)
[Object Manager](#)

- Users
- Public Groups**
- Feature Settings
 - Salesforce Files
 - Content Deliveries and **Public Links**
 - Company Settings
 - Calendar Settings
 - Public** Calendars and Resources


Public Groups


Group

Iksha

[Edit](#)
[Delete](#)
[View Summary](#)

Label	Iksha		
Group Name	Iksha		
Grant Access Using Hierarchies	<input checked="" type="checkbox"/>		
Description			
Created By	KEMBURU VENKAT MANEESH, 27/10/2024, 9:55 am	Modified By	KEMBURU VENKAT MANEESH, 27/10/2024, 9:55 am

[View All Users](#)

Name	Type
KEMBURU VENKAT MANEESH	User
Iksha Foundation Iksha_Foundation	User

nss

Search Setup

Setup Home Object Manager

public

Users

Public Groups

Feature Settings

Salesforce Files

Content Deliveries and Public Links

Company Settings

Calendar Settings

Public Calendars and Resources

Didn't find what you're looking for? Try using Global Search.

SETUP Public Groups

Group nss

Help for this Page

Edit Delete View Summary

Label	nss
Group Name	nss
Grant Access Using Hierarchies	<input checked="" type="checkbox"/>
Description	
Created By	KEMBURU VENKAT MANEESH, 27/10/2024, 9:56 am
Modified By	KEMBURU VENKAT MANEESH, 27/10/2024, 9:56 am

View All Users

Name	Type
KEMBURU VENKAT MANEESH	User
NSS.NSS	User

street cause

Search Setup

Setup Home Object Manager

public

Users

Public Groups

Feature Settings

Salesforce Files

Content Deliveries and Public Links

Company Settings

Calendar Settings

Public Calendars and Resources

Didn't find what you're looking for? Try using Global Search.

SETUP Public Groups

Group street cause

Help for this Page

Edit Delete View Summary

Label	street cause
Group Name	street_cause
Grant Access Using Hierarchies	<input checked="" type="checkbox"/>
Description	
Created By	KEMBURU VENKAT MANEESH, 27/10/2024, 9:57 am
Modified By	KEMBURU VENKAT MANEESH, 27/10/2024, 9:57 am

View All Users

Name	Type
KEMBURU VENKAT MANEESH	User
Street Cause Street Cause	User

11) Report Types

What is a Report Type?

Report types define the set of records and fields available for a report. They determine which objects, and their relationships can be included, allowing users to create customized reports based on specific criteria.

Venue with DropOff with Volunteer

Source	Selected Fields
Drop-Off Points	12
Volunteers	16
Execution Details	9

12) Dashboards

What is a Dashboard?

Dashboards are visual displays of key metrics and reports, providing a snapshot of business performance. They consist of multiple components like charts, graphs, and tables, offering insights and data visualization for decision-making.

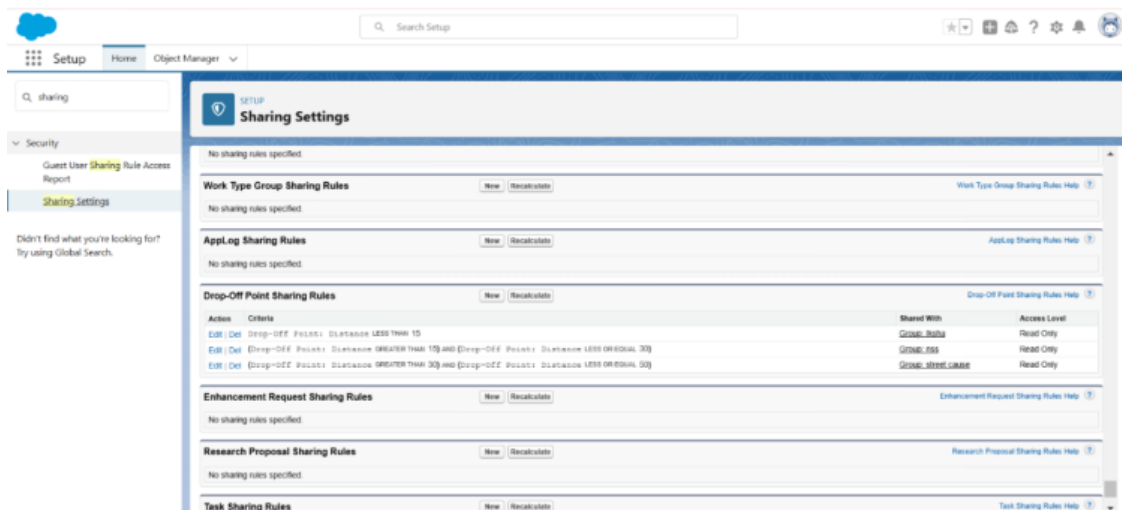
13) Sharing Rules

What is a Sharing Rule?

sharing rules are used to extend access to records to users in public groups or roles.



They allow administrators to define additional criteria for sharing records beyond what is granted by default through profiles and roles, ensuring appropriate data access across the organization.



5. Testing and Validation

To ensure the robustness of the system, the project incorporated multiple layers of testing:

- Unit Testing:** For Apex classes and triggers, confirming all business logic performed as expected.
- User Interface Testing:** Conducted to ensure a smooth and user-friendly experience, especially for mobile field agents updating delivery statuses.

2. Key Scenarios Addressed by Salesforce in the Implementation Project

The project handles various real-life scenarios:

- Automated matching of food donations based on location and urgency.
- Real-time status updates for field agents during deliveries.
- Detailed reporting to track and evaluate donation efficiency, volunteer participation, and overall impact.

7. Conclusion

Summary of Achievements: This project successfully created a streamlined and transparent system for managing surplus food donations, reducing food waste, and addressing hunger. Through efficient coordination of donations and volunteer efforts, the solution maximized the positive impact on food security for underserved communities.

