

# Project Title: To Supply Leftover Food to Poor

**Category:** Salesforce

**Skills Required:** Salesforce Developer

## Project Overview

The CRM Application for Food Connect is designed to facilitate the efficient distribution of leftover food to communities in need. The application leverages Salesforce's robust CRM capabilities to streamline the food supply chain, improve interaction with partners, and ensure seamless food distribution operations. A notable feature of the application is its integration with communication tools to engage and collaborate effectively with food donors, recipients, and volunteers.

## Features and Functionalities

- **Food Inventory Management:** Tracks and manages the inventory of surplus food available for distribution.
- **Donor and Recipient Management:** Maintains detailed records of donors, recipients, and their interactions with the food supply service.
- **Food Donation and Distribution Process:** Facilitates the scheduling and management of food donations and their distribution lifecycle.
- **Billing and Donation Tracking:** Automates tracking and reporting of donations and billing (if applicable for handling costs).
- **User Roles and Profiles:** Defines different levels of access and user roles, such as Admin, Donor, Volunteer, and Recipient Coordinator, to ensure proper data handling and security.
- **Validation Rules:** Ensures the accuracy and completeness of critical information such as contact details, donation specifics, and eligibility criteria for recipients.
- **Automation via Flows and Apex:** Utilizes Salesforce Flows and Apex triggers to automate key processes, such as scheduling donations and tracking food distribution status.
- **Reports and Dashboards:** Provides real-time insights into food distribution metrics, donation trends, and volunteer engagement through comprehensive reports and visual dashboards.

# Detailed Setup Instructions

## Objects

- **Navigate to Setup:**
  - From the setup page, click on **Object Manager**.
- **Create a Custom Object:**
  - Click on **Create >> Custom Object**.
- **Enter Details:**
  - **Label Name:** Enter the name (e.g., *Venue, Drop-Off Point, Task, Volunteer, Execution Detail*).
  - **Plural Label Name:** Enter the plural form (e.g., *Venues, Drop-Off Points*, etc.).
  - **Record Name Label:** Enter the record name (e.g., *Venue Name, Task Name*).
  - **Data Type:** Choose **Text**.
- **Enable Options:**
  - Check **Allow Reports, Track Field History**, and **Allow Activities**.
  - Enable **Allow Search**.
- **Save:**
  - Click **Save** to complete the creation.

### Details

EditDelete

Description	
API Name	Enable Reports
Execution_Detail__c	✓
Custom	Track Activities
✓	✓
Singular Label	Track Field History
Execution Detail	✓
Plural Label	Deployment Status
Execution Details	Deployed
	Help Settings
	Standard salesforce.com Help Window

Details

EditDelete

Description

API Name  
Drop\_Off\_Point\_\_c

Custom  
✓

Singular Label  
Drop-Off Point

Plural Label  
Drop-Off Points

Enable Reports  
✓

Track Activities  
✓

Track Field History  
✓

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Details

EditDelete

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

Details

EditDelete

Description

API Name  
Venue\_\_c

Custom  
✓

Singular Label  
Venue

Plural Label  
Venues

Enable Reports  
✓

Track Activities  
✓

Track Field History  
✓

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

## Details

[Edit](#) [Delete](#)

Description

API Name

Task\_c

Custom

✓

Singular Label

Task

Plural Label

Tasks

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status


Deployed

Help Settings

Standard salesforce.com Help Window

## Creating Tabs

1. **Navigate to Setup:**
  - a. Type "**Tabs**" in the Quick Find bar and select **Tabs**.
2. **Create a New Tab:**
  - a. Click on **New** under **Custom Object Tabs**.
  - b. Select the custom object (e.g., *Venue*) and choose a **Tab Style**.
  - c. Keep default settings, ensure **Append tab to users' existing personal customizations** is checked, and uncheck **Include Tab in Custom App**.
  - d. Click **Save**.
3. **Create Remaining Tabs:**
  - Repeat the steps for the following objects: a. *Drop-Off Point*  
b. *Task*  
c. *Volunteer*  
d. *Execution Details*






 **SETUP**  
**Tabs**

### Custom Tabs

[Help for this Page](#)

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs		<a href="#">New</a>	<a href="#">What Is This?</a>
Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Drop-Off Points</a>	 Airplane	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Execution Details</a>	 Balls	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Tasks</a>	 Bank	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Venues</a>	 Books	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Volunteers</a>	 Can	

**Web Tabs** [New](#) [What Is This?](#)

No Web Tabs have been defined

**Visualforce Tabs** [New](#) [What Is This?](#)

No Visualforce Tabs have been defined

## Creating a Lightning App Page

1. **Navigate to App Manager:**
  - a. Go to the **Setup** page.
  - b. Search for "**App Manager**" in the Quick Find bar and select **App Manager**.
2. **Create a New Lightning App:**
  - a. Click on **New Lightning App**.
  - b. Fill in the app details:
    - **App Name:** *FoodConnect*
    - **Developer Name:** (This will auto-populate)
    - **Image:** Optional (You can upload an image, but it's not mandatory).
    - **Primary Color Hex Value:** Keep the default.
  - c. Click **Next**.
3. **App Options:**
  - a. Set **Navigation Style** to **Standard Navigation**.
  - b. Click **Next**.
4. **Utility Items:**
  - a. Keep it as default and click **Next**.
5. **Add Navigation Items:**
  - a. Search for the following items in the search bar:
    - **Home, Venue, Drop-Off Point, Task, Volunteer, Execution Details, Reports.**
  - b. Use the arrow button to move them to the **Selected Items** section.
  - c. Click **Next**.
6. **Add User Profiles:**
  - a. Search for **System Administrator** in the search bar.
  - b. Click the arrow button to add it.
  - c. Click **Save & Finish**

## Creating Fields

### 1. Create Master-Detail Relationship Field on Volunteer Object

- Go to **Setup > Object Manager > Search for Volunteer > Click on it.**
- Under **Fields & Relationships**, click **New**.
- Select **Master-Detail Relationship**.
- Choose the related object **Drop-Off Point**.
- Field Name: Drop\_Off\_point, Field Label: Auto-generated.
- Click **Next**, then **Save**.

### 2. Create Master-Detail Relationship Field on Execution Details Object

- Go to **Setup > Object Manager > Search for Execution Details > Click on it.**
- Under **Fields & Relationships**, click **New**.
- Select **Master-Detail Relationship**.
- Choose the related object **Volunteer**.
- Field Name: Volunteer, Field Label: Auto-generated.
- Click **Next**, then **Save**.

### 3. Create Lookup Relationship Fields

- For **Drop-Off Point** Object:

- Go to **Setup > Object Manager > Search for Task > Click on it.**
- Under **Fields & Relationships**, click **New**.
- Select **Lookup Relationship**, choose **Drop-Off Point**.
- Field Name: Venue, Field Label: Venue\_\_c.
- Click **Next**, then **Save**.
- For **Task** Object:
  - Go to **Setup > Object Manager > Search for Task > Click on it.**
  - Under **Fields & Relationships**, click **New**.
  - Select **Lookup Relationship**, choose **Venue**.
  - Field Name: Sponsored By, Field Label: Auto-generated.
  - Click **Next**, then **Save**.

#### 4. Create Fields for the Venue Object

- Create **Email**, **Phone**, **Geolocation**, and **Long Text Area** fields as described in the instructions, following similar steps:
  - Go to **Setup > Object Manager > Search for Venue**.
  - Under **Fields & Relationships**, click **New**, choose the appropriate data type (Email, Phone, Geolocation, etc.), and fill in the necessary details (Field Label, Field Name).
  - Click **Next** and **Save**.

#### 5. Create Fields for the Drop-Off Point Object

- Follow similar steps as for **Venue** to create **Geolocation**, **Formula**, and **Picklist** fields:
  - Geolocation: Location 2
  - Formula: distance\_calculation (using DISTANCE formula function).
  - Picklist: State (with predefined states listed).

#### 6. Create Fields for the Task Object

- Create fields like **Auto Number**, **Date**, **Picklist (Multi-Select)**, **Number**, and **Text** for the **Task** object:
  - Auto Number: Task ID (Format: TASK-{0}).
  - Date: Date.
  - Picklist: Food Category.
  - Number: Number of People Served.
  - Text: Name of the Person, etc.

## 7. Create Fields for the Volunteer Object

- For **Volunteer** object, create fields like **Auto Number**, **Picklist**, **Number**, **Email**, **Text Area**, etc., similar to the other objects:
  - Auto Number: Volunteer ID.
  - Picklist: Gender.
  - Date: Available On, Date of Birth.

## 8. Create Fields for the Execution Details Object

- For **Execution Details** object, create an **Auto Number** field:
  - Auto Number: Execution ID.

For each field, follow these steps:

1. Go to **Setup > Object Manager**.
2. Select the object.
3. Under **Fields & Relationships**, click **New**.
4. Choose the field type, fill in the necessary details, then click **Save**.

SETUP > OBJECT MANAGER					
Execution Detail					
Details <ul style="list-style-type: none"><li>Fields &amp; Relationships</li><li>Page Layouts</li><li>Lightning Record Pages</li><li>Buttons, Links, and Actions</li><li>Compact Layouts</li><li>Field Sets</li><li>Object Limits</li><li>Record Types</li><li>Related Lookup Filters</li><li>Search Layouts</li><li>List View Button Layout</li><li>Restriction Rules</li><li>Scoping Rules</li><li>Object Access</li><li>Triggers</li><li>Flow Triggers</li><li>Validation Rules</li></ul>	<b>Fields &amp; Relationships</b> <div>5 Items, Sorted by Field Label</div> <div>Quick FindNewDeleted FieldsField DependenciesSet History Tracking</div>				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
	Created By	CreatedById	Lookup(User)		
	Execution Detail Name	Name	Text(80)		✓
	Last Modified By	LastModifiedById	Lookup(User)		
	Task	Task__c	Lookup(Task)		✓
	Volunteer	Volunteer__c	Master-Detail(Volunteer)		✓



Details

Fields & Relationships

14 Items, Sorted By Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

Fields & Relationships

Field Label	Field Name	Data Type	Controlling Field	Indexed
Page Layouts	Address	Address_c	Long Text Area(32768)	
Lightning Record Pages	Age	Age_c	Number(16, 0)	
Buttons, Links, and Actions	Available On	Available_On_c	Date	
Compact Layouts				
Field Sets	Contact Number	Contact_Number_c	Number(18, 0)	
Object Limits	Created By	CreatedById	Lookup(User)	
Record Types	Date of Birth	Date_of_Birth_c	Date	
Related Lookup Filters	Drop-Off Point	Drop_Off_Point_c	Master-Detail(Drop-Off Point)	✓
Search Layouts	Email	Email_c	Email	
List View Button Layout				
Restriction Rules	Execution ID	Execution_ID_c	Auto Number	
Scoping Rules	Gender	Gender_c	Picklist	
Object Access	Last Modified By	LastModifiedById	Lookup(User)	
Triggers	Owner Name	Owner_Name_c	Text(18)	
Flow Triggers				
Validation Rules	Volunteer ID	Volunteer_ID_c	Auto Number	
	Volunteer Name	Name	Text(50)	✓

Details	<b>Fields &amp; Relationships</b> 8 Items, sorted by Field Label			<input type="text" value="Quick Find"/>	<a href="#">New</a>	<a href="#">Deleted Fields</a>	<a href="#">Field Dependencies</a>	<a href="#">Set History Tracking</a>
<b>Fields &amp; Relationships</b>	<b>FIELD LABEL</b>	<b>FIELD NAME</b>	<b>DATA TYPE</b>	<b>CONTROLLING FIELD</b>	<b>INDEXED</b>			
Page Layouts	<a href="#">Contact Email</a>	Contact_Email__c	Email					▼
Lightning Record Pages	<a href="#">Contact Phone</a>	Contact_Phone__c	Phone					▼
Buttons, Links, and Actions	<a href="#">Created By</a>	CreatedById	Lookup(User)					
Compact Layouts	<a href="#">Last Modified By</a>	LastModifiedById	Lookup(User)					
Field Sets	<a href="#">Location</a>	Location__c	Geolocation					▼
Object Limits	<a href="#">Owner</a>	OwnerId	Lookup(User.Group)		✓			
Record Types	<a href="#">Venue Location</a>	Venue_Location__c	Long Text Area(32768)					▼
Related Lookup Filters	<a href="#">Venue Name</a>	Name	Text(30)		✓			▼
Search Layouts								
List View Button Layout								
Restriction Rules								
Scoping Rules								
Object Access								
Triggers								
Flow Triggers								
Validation Rules								

Details	Fields & Relationships 16 Items. Sorted By Field Label				Quick Find	New	Deleted Fields	Field Dependencies	Set History Tracking
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED				
Page Layouts	Created By	CreatedById	Lookup(User)						
Lightning Record Pages	Date	Date__c	Date						
Buttons, Links, and Actions	Distance	Distance__c	Number(14, 4)						
Compact Layouts	Drop-Off Point	Drop_Off_Point__c	Lookup(Drop-Off Point)		✓				
Field Sets	Execution Detail	Execution_Detail__c	Master-Detail(Execution Detail)		✓				
Object Limits	Feedback	Feedback__c	Long Text Area(32768)						
Record Types	Food Category	Food_Category__c	Picklist (Multi-Select)						
Related Lookup Filters	Last Modified By	LastModFeedById	Lookup(User)						
Search Layouts	Name of the Person	Name_of_the_Person__c	Text(18)						
List View Button Layout	Number of People Served	Number_of_People_Served__c	Number(18, 0)						
Restriction Rules	Phone	Phone__c	Phone						
Scoping Rules	Rating	Rating__c	Picklist						
Object Access	Sponsored By	Sponsored_By__c	Lookup(Venue)		✓				
Triggers	Task ID	Task_ID__c	Auto Number						
Flow Triggers	Task Name	Name	Text(50)		✓				
Validation Rules	Venue__c	Venue__c	Lookup(Drop-Off Point)		✓				

# Creating Flows

## 1. Create Flow:

- Go to **Setup** → Type "Flow" → Click **New Flow**.
- Select **Screen Flow** → **Create**.

## 2. Add Screen Element:

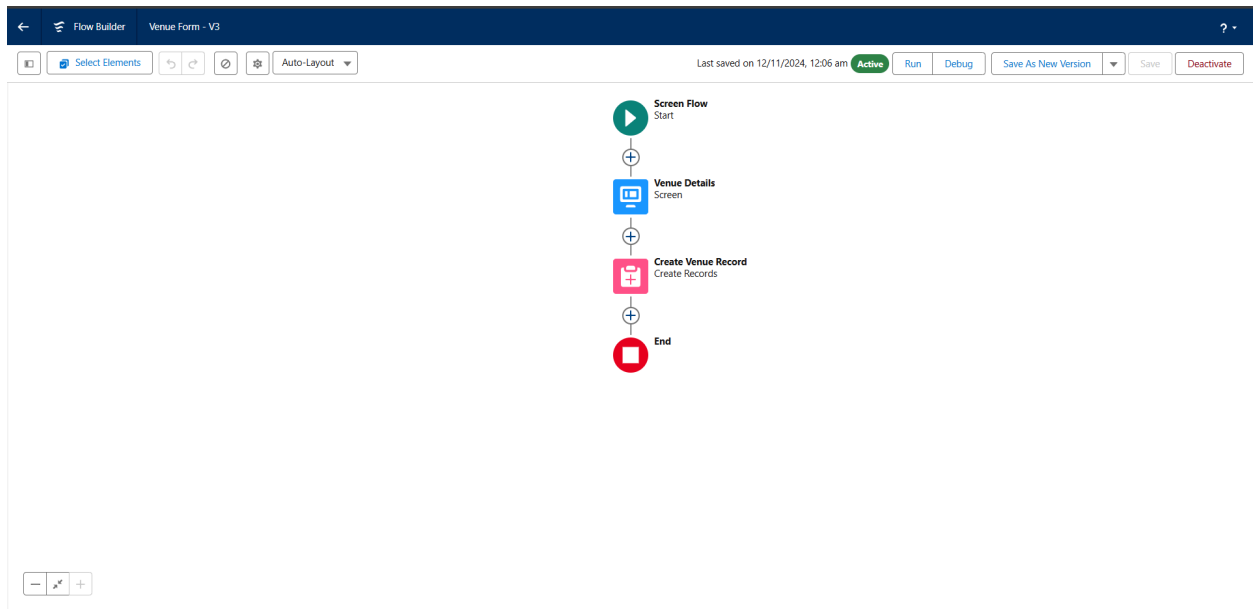
- Click '+' → Select **Screen**.
- Set **Label**: Venue Details, **API Name**: Venue\_Details.
- Add these components:
  - **Text**: Venue Name
  - **Email**: Contact Email
  - **Phone**: Contact Phone
  - **Text**: Venue Location
  - **Number**: Latitude
  - **Number**: Longitude
- Click **Done**.

## 3. Create Record Element:

- Click '+' → Select **Create Record**.
- Set **Label**: Create Venue Record, **API Name**: Create\_Venue\_Record.
- Choose **One record** → Set fields:
  - **Contact\_Email\_\_c** = {!Contact\_Email.value}
  - **Contact\_Phone\_\_c** = {!Contact\_Phone.value}
  - **Name** = {!Venue\_Name}
  - **Venue\_Location\_\_c** = {!Venue\_Location}
  - **Location\_\_Latitude\_\_s** = {!Latitude}
  - **Location\_\_Longitude\_\_s** = {!Longitude}
- Click **Done**.

## 4. Save Flow:

- **Flow Label**: Venue Form
- **API Name**: Venue\_Form
- Click **Save**.



## TRIGGERS

### 1. Log into Trailhead:

- Click the **Gear Icon** → **Developer Console**.

### 2. Create Trigger:

- Go to **File** → **New** → **Trigger**.
- Set:
  - **Trigger Name:** DropOffTrigger
  - **Object:** Drop-Off Point

### 3. Write Trigger 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;  
    }  
}
```

### 4. Submit to save the trigger.

## Creating Profiles

### 1. Go to Setup:

- Type **Profiles** in the Quick Find box and select **Profiles**.

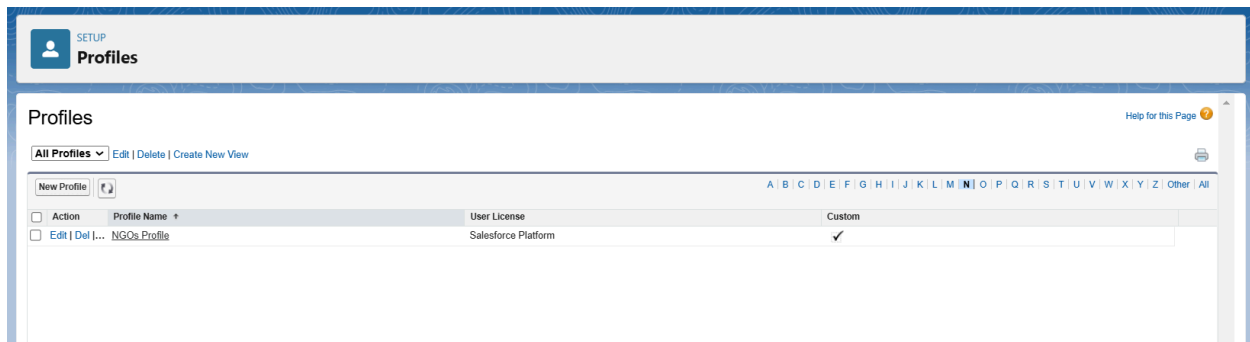
### 2. Clone Profile:

- Find **Standard Platform User**, and click on **Clone**.

### 3. Set Profile Name:

- Enter **Profile Name**: NGOs Profile.

### 4. Save the profile.



## Create User:

### 1. Go to Setup: Type Users in Quick Find and select Users.

### 2. Click on New User.

### 3. Fill in General Information:

- **First Name**: Iksha Foundation
- **Last Name**: Iksha\_Foundation
- **Alias**: iiksh
- **Email**: Your Email
- **Username**: ikshafoundation@sb.com (use a unique username)
- **Nickname**: Auto Populated
- **User License**: Salesforce Platform
- **Profile**: NGOs Profile
- **Active**: Check

### 4. Click Save

Follow the same steps to create two more users.

Use different **First Name** and **Last Name** based on other NGOs, but keep the same **User License** and **Profile**.

**SETUP**  
**Users**

**All Users** [Help for this Page](#)

On this page you can create, view, and manage users.  
To get more licenses, use the Your Account app. [Let's Go](#)

View: **All Users** [Edit](#) [Create New View](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

<input type="checkbox"/> Action	Full Name +	Alias	Username	Role	Active	Profile
<input type="checkbox"/> <a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00dd000007xdquab.hfm2h2qobgth@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> <a href="#">Edit</a>	Iksha Foundation, Iksha Foundation	iksh	ikshafoundation17@sb.com		✓	NGOs Profile
<input type="checkbox"/> <a href="#">Edit</a>	Nss, NSS	nss	nss1724@gmail.com		✓	NGOs Profile
<input type="checkbox"/> <a href="#">Edit</a>	Puchakayala, Harshitha	HPuch	harshitha1724@gmail.com		✓	System Administrator
<input type="checkbox"/> <a href="#">Edit</a>	Street Cause, Street Cause	sstre	sstre1724@gmail.com		✓	NGOs Profile
<input type="checkbox"/> <a href="#">Edit</a>	User, Integration	integ	integration@00dd000007xdquab.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> <a href="#">Edit</a>	User, Security	sec	insightssecurity@00dd000007xdquab.com		✓	Analytics Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

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

## Create Public Group :

1. **Go to Setup:** Type **Public Groups** in Quick Find and select **Public Groups**.
2. **Click on New.**
3. **Group Information:**
  - **Label:** Iksha
  - **Group Name:** Iksha
  - **Grant Access Using Hierarchies:** Check
4. **Search for Users** and add:
  - **Iksha Foundation**
  - **System Administrator**
5. **Click Save.**

Follow the same steps to create two more public groups for the other two users.

SETUP

Public Groups

Public Groups

Help for this Page

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

View: All Edit Create New View

A

B

C

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U

V

W

X

Y

Z

Other

All

New

Action	Label +	Group Name	Created By	Created Date
<a href="#">Edit</a>   <a href="#">Del</a>	Iksha	Iksha	Puchakayala_Harshitha	08/11/2024, 11:29 pm
<a href="#">Edit</a>   <a href="#">Del</a>	NSS	NSS	Puchakayala_Harshitha	08/11/2024, 11:30 pm
<a href="#">Edit</a>   <a href="#">Del</a>	Street_Cause	Street_Cause	Puchakayala_Harshitha	08/11/2024, 11:30 pm

## Creation of Report Types

- Go to Setup:** Type **Report Types** in Quick Find, click on **Report Types**, then click **New Custom Report Type**.
- Define Custom Report Type:**
  - **Primary Object:** Venues
  - **Label:** Venue with DropOff with Volunteer
  - **Name:** Venue\_with\_DropOff\_with\_Volunteer
  - **Description:** Venue with DropOff with Volunteer
  - **Category:** Other Reports
  - **Deployment Status:** Deployed
- Relate Objects:**
  - First, relate to **Drop-Off Points** (Choose "A" records may or may not have related "B" records).
  - Then, relate to **Volunteers**.
- Click Save.**



SETUP

## Report Types

Custom Report Type

## Venue with DropOff with Volunteer

[Help for this Page](#)

Below is the information for this custom report type. You can click the buttons on this page to preview or update information for the custom report type.

## Custom Report Type Definition

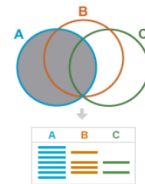
[Edit](#) [Delete](#) [Clone](#)

Report Type Label	Venue with DropOff with Volunteer	Report Type Category	Other Reports
Report Type Name	Venue_with_DropOff_with_Volunteer	Deployment Status	Deployed
Description	Venue with DropOff with Volunteer		
Created By	Harshitha Puchakayala, 08/11/2024, 11:34 pm	Modified By	Harshitha Puchakayala, 08/11/2024, 11:34 pm

## Object Relationships

[Edit](#)[Object Relationships Help](#)

## Venues (A)

☐ with or without related records from Drop-Off Points (B)☐ with or without related records from Volunteers (C)

## Fields Available for Reports

[Edit Layout](#) [Preview Layout](#)[Fields Available for Reports Help](#)

Source	Selected Fields
Venues	13



SETUP

## Report Types

Custom Report Type

## Volunteers With Execution Details And Tasks

[Help for this Page](#)

Below is the information for this custom report type. You can click the buttons on this page to preview or update information for the custom report type.

## Custom Report Type Definition

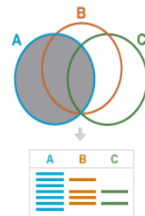
[Edit](#) [Delete](#) [Clone](#)

Report Type Label	Volunteers With Execution Details And Tasks	Report Type Category	Other Reports
Report Type Name	Volunteers_With_Execution_Details_And_Tasks	Deployment Status	Deployed
Description	Volunteers With Execution Details And Tasks		
Created By	Harshitha Puchakayala, 12/11/2024, 12:46 am	Modified By	Harshitha Puchakayala, 12/11/2024, 12:46 am

## Object Relationships

[Edit](#)[Object Relationships Help](#)

## Volunteers (A)

☐ with or without related records from Execution Details (B)☐ with or without related records from Tasks (C)

## Fields Available for Reports

[Edit Layout](#) [Preview Layout](#)[Fields Available for Reports Help](#)

Source	Selected Fields
Volunteers	18

# Reports

## Creation of Report on Venue with DropOff with Volunteer

1. **Go to Reports Tab:** In the app, click **Reports**.
2. **Create Folder:**
  - Click on **New Folder**.
  - Name it **Custom Reports**.
  - Click **Save**.
3. **Create New Report:**
  - Select **Venue with DropOff with Volunteer**.
  - Click **Start Report**.
4. **Group Rows:** Add **Volunteer Name**.
5. **Add Columns:**
  - Venue Name
  - Drop-Off point Name
  - Distance
6. **Save & Run:**
  - **Name it:** Venue and Drop Off Point.
  - **Select Folder:** Custom Report.
  - **Click Save**.

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

REPORT venue and Drop Off point Venue with DropOff with Volunteer

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

Volunteer Name	Venue Name	Drop-Off Point Name	Distance
Rahul (1)	Sara Foundation	Delhi	5,368.2100
Subtotal			5,368.2100
Mahesh (1)	xyz foundation	Hyderabad	173.0000
Subtotal			173.0000
Total (2)			5,541.2100

Row Counts Detail Rows Subtotals Grand Total

Unified Analytics Home



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

1. **Go to Reports Tab:** In the app, click **Reports**.
2. **Create New Report:** Select **Volunteers with Execution Details and Tasks**.
3. **Start Report:** Group by **Volunteer ID**, and add columns:
  - **Volunteer Name**
  - **Task Name**
  - **Execution Detail Name**
  - **Owner Name**
  - **Date**
  - **Rating**
4. **Save & Run:** Name it **Volunteer Task**, select folder **Custom Report**, then save.

The screenshot shows the FoodConnect app interface. The top navigation bar includes a search bar and several icons. The main menu on the left lists: Home, Venues, Tasks, Drop-Off Points, Execution Details, Volunteers, Reports (selected), and Dashboards. The 'Reports' section is active, showing a report titled 'Volunteer Task' with the subtitle 'Volunteers With Execution Details And Tasks'. The report is grouped by 'Volunteer ID'. The table displays the following data:

Volunteer ID	Volunteer Name	Task Name	Execution Detail Name	Owner Name	Date	Rating
1 (1)	Rahul	-	-	Sara	-	-
Subtotal						
2 (1)	Mahesh	-	-	XYZ	-	-
Subtotal						
Total (2)						

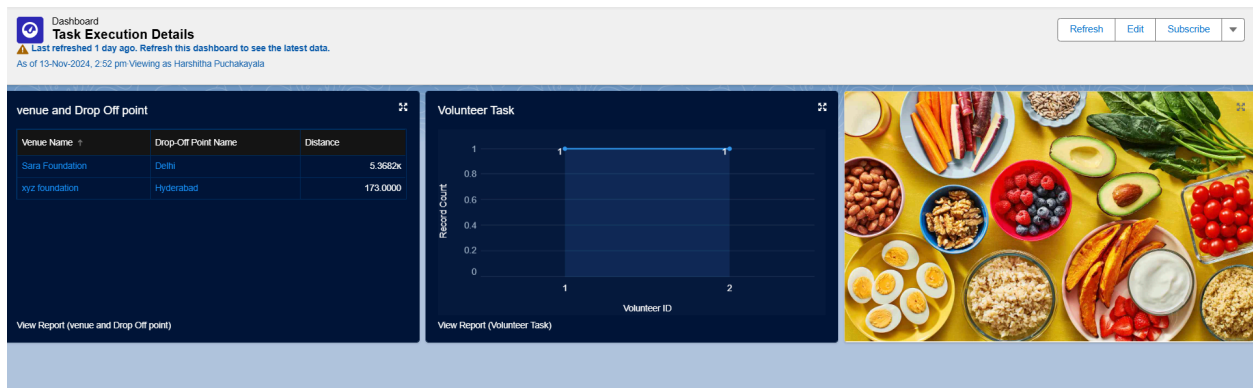
The interface also includes a sidebar with 'Groups' and 'Columns' sections, and a top right area with buttons for 'Add Chart', 'Save & Run', 'Save', 'Close', and 'Run'.

## Dashboards

### Adding Reports to Dashboard

1. **Go to Dashboards Tab:** Click on **New Folder**, name it **Custom Dashboards**, then save.
2. **New Dashboard:** Name it **Organization Details**.
3. **Add Widgets:**
  - For **Venue and Drop Off Point:** Select **Lightning Table** and save.
  - For **Volunteer Task:** Select **Line Chart** and save.

4. **Add Image (Optional):** Select **Image Widget**, browse files to upload, and save as **Task Execution Details**.



## Creation of Sharing Rules

1. **Go to Setup:** Type **Sharing Settings** in Quick Find, click on **Sharing Settings**.
2. **Create Rules:**
  - **Rule 1:** Distance < 15, Share with **Iksha** public group.
  - **Rule 2:** Distance between 15-30, Share with **NSS** public group.
  - **Rule 3:** Distance between 30-50, Share with **Street Cause** public group.

SETUP

Sharing Settings

Work Plan Template Sharing Rules

New Recalculate

Work Plan Template Sharing Rules Help ?

No sharing rules specified.

Work Step Template Sharing Rules

New Recalculate

Work Step Template Sharing Rules Help ?

No sharing rules specified.

Work Type Sharing Rules

New Recalculate

Work Type Sharing Rules Help ?

No sharing rules specified.

Work Type Group Sharing Rules

New Recalculate

Work Type Group Sharing Rules Help ?

No sharing rules specified.

Account Sharing Rules

New Recalculate

Account Sharing Rules Help ?

No sharing rules specified.

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 THAN 15	Group: Iksha	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)	Group: NSS	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)	Group: Street Cause	Read/Write

Venue Sharing Rules

New Recalculate

Venue Sharing Rules Help ?

No sharing rules specified.

## Creation of Home Page

- Go to Setup:** Type **Lightning App Builder** in Quick Find, click on **Lightning App Builder**.
- Create Home Page:** Select **Standard Home Page**, name it **HOME Page**.
- Add Components:**
  - **Flow:** Add **Venue Flow**.
  - **Dashboard:** Add **Dashboard** component.
- Save & Activate:** Set **FoodConnect App**, then save.

FoodConnect

Home

Venues

Tasks

Drop-Off Points

Execution Details

Volunteers

Reports

Dashboards

Search...

Dashboard

Task Execution Details

Open

Refresh

Subscribe

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

As of 13-Nov-2024, 2:52 pm Viewing as Harshitha Puchakayala

venue and Drop Off point

Venue Name	Drop-Off Point Name	Distance
Sara Foundation	Deshi	5.3682x
xyz foundation	Hyderabad	173.0000

View Report (venue and Drop Off point)

Volunteer Task

View Report (Volunteer Task)

Venue Form

Venue Name

Email

Phone

Venue Location

Latitude

Longitude

Next