

TO SUPPLY LEFTOVER FOOD TO POOR

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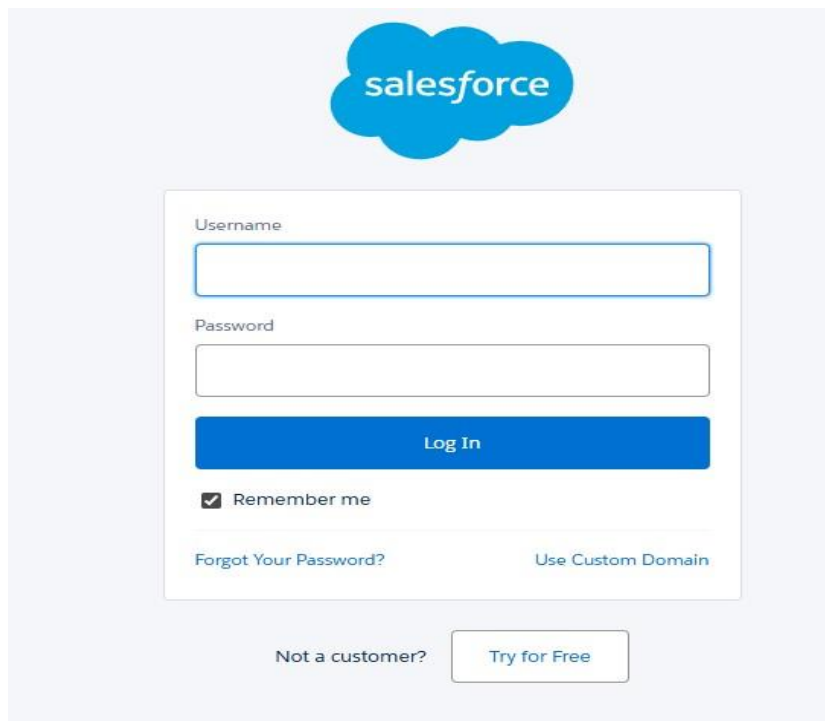
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I. Introduction

Salesforce is a cloud-based Customer Relationship Management (CRM) platform that provides tools to manage and optimize customer relationships, sales processes, and customer service.

The purpose of this project is to create a solution that helps distribute leftover food to poor people effectively by using Salesforce for data management, automation, and reporting.



II. Custom Report Types

To track the operations of food distribution, we need to create custom report types.

Steps:

1. Go to Setup → Quick Find → Report Types → Continue → New Custom Report Type.

Primary Object: Venues

Report Type Label: Venue with Drop Off with Volunteer

Report Type Name: Venue_with_DropOff_with_Volunteer

Description: Venue with Drop Off with Volunteer

Store in Category: Other Reports

Deployment Status: Deployed

The screenshot shows the Salesforce Setup interface for 'Report Types'. The left sidebar contains navigation options under 'Feature Settings' > 'Analytics' > 'Reports & Dashboards', including 'Access Policies', 'Historical Trending', 'Report Types' (selected), 'Reporting Snapshots', 'Reports and Dashboards Settings', and 'Security' > 'Guest User Sharing Rule Access Report'. The main content area is titled 'All Custom Report Types' and includes a search bar and a 'New Custom Report Type' button. Below this is a table listing existing report types.

Action	Label *	Description	Category	Deployed	Created By Alias	Created Date
Edit Del	Drop-Off Points with Volunteers with Execution Details	Drop-Off Points with Volunteers with Execution Details	Other Reports	✓	STW	26/12/2024
Edit Del	Orchestration Run Logs Spring '24	Find out which orchestration run logs were created and what happened in their associated orchestration runs.	Other Reports	✓	autoproc	26/12/2024
Edit Del	Orchestration Runs Spring '24	Find out which orchestration runs were created.	Other Reports	✓	autoproc	26/12/2024
Edit Del	Orchestration Stage Runs Spring '24	Find out which orchestration stage runs were created and the current status of each run.	Other Reports	✓	autoproc	26/12/2024
Edit Del	Orchestration Step Runs Spring '24	Find out which orchestration step runs were created and the current status of each run.	Other Reports	✓	autoproc	26/12/2024
Edit Del	Orchestration Work Items Spring '24	Find out which orchestration work items were created, who's the associated assignee, and what's the current status of each work item.	Other Reports	✓	autoproc	26/12/2024
Edit Del	Program Definition Spring '24	Review your analytics with a program-like structure. See each program task, target day, results, and more directly in a report and dashboard.	Other Reports	✓	autoproc	26/12/2024
Edit Del	Program Definition Summer '24	Review your analytics with a program-like structure. See each program task, target day, results,	Other	✓	autoproc	26/12/2024

2. Click Next → relate Drop-Off Points (option: “A records may or may not have related B records”) → relate Volunteers → Save.

The screenshot shows the 'New Custom Report Type' form in Salesforce Setup. The 'Identification' section contains the following fields:

- Report Type Label:** Drop-Off Points with Volunteers with Execution Details
- Report Type Name:** Drop_Off_Points_with_Volu
- Description:** Drop-Off Points with Volunteers with Execution Details
- Report Type Category:** Other Reports

The 'Deployment' section shows the **Deployment Status** set to **Deployed** (selected over 'In Development'). At the bottom are 'Save' and 'Cancel' buttons.

Creating Reports

Go to Reports tab → New Folder (name: Custom Reports).

Create the following reports:

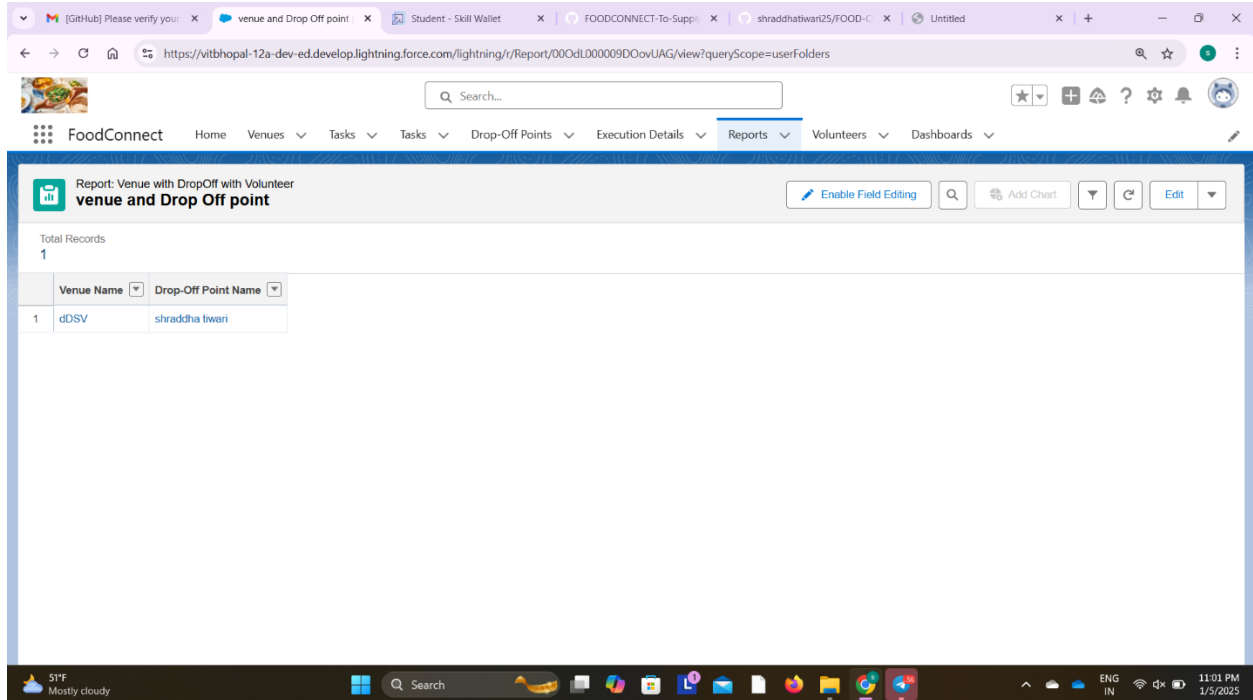
Report 1: Venue and Drop Off Point

Report Type: Venue with Drop Off with Volunteer

Group Rows By: Volunteer Name

Columns: Venue Name, Drop-Off Point Name, Distance

Save as Venue and Drop Off Point in Custom Reports folder.



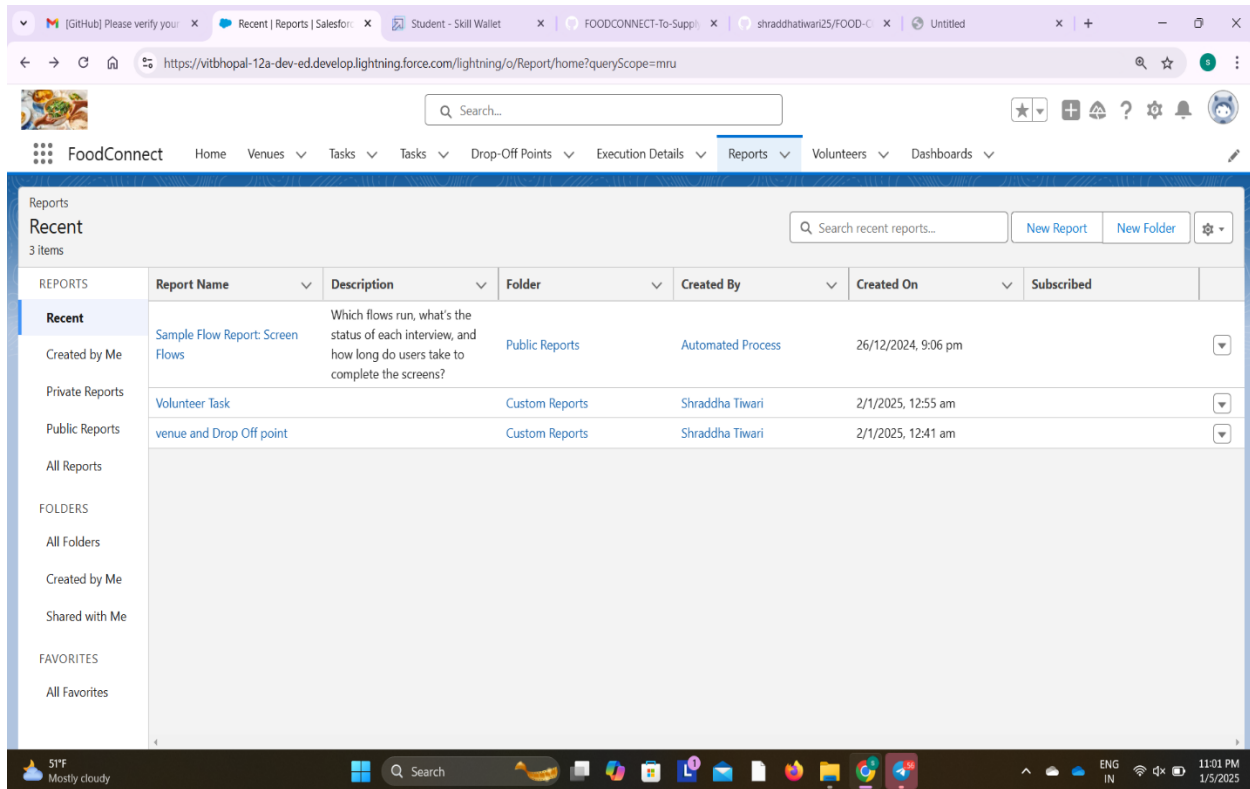
Report 2: Volunteer Task

Report Type: Volunteers with Execution Details and Tasks

Group Rows By: Volunteer ID

Columns: Volunteer Name, Task Name, Execution Detail Name, Owner Name, Date, Rating

Save as Volunteer Task in Custom Reports folder.



III. Dashboard Creation

Dashboards provide a visual representation of data to track metrics such as food collected, delivered, and volunteer activity.

Steps:

1. Go to Dashboards tab → New Dashboard.

2. Name: Food Distribution Overview → Choose Folder.

3. Add components:

From Venue and Drop Off Point report → Add as Lightning Table.

From Volunteer Task report → Add as Line Chart.

Add an Image Widget if required (e.g., Task Execution Details image).

The screenshot shows a web browser window with multiple tabs. The active tab is a Lightning Dashboards page for 'FoodConnect'. The dashboard is titled 'Organization Details' and includes a search bar and navigation menu. The main content area displays two widgets:

- venue and Drop Off point**: A table with two columns: 'Venue Name' and 'Drop-Off Point Name'. The table contains one row with the values 'dDSV' and 'shraddha tiwari'.
- Volunteer Task**: A chart placeholder with the text 'We can't draw this chart because there is no data.'

A large image of various fruits and vegetables is displayed on the right side of the dashboard. The bottom of the screen shows a Windows taskbar with the date and time '11:04 PM 1/5/2025'.

Venue Name ↑	Drop-Off Point Name
dDSV	shraddha tiwari

IV. Sharing Rules

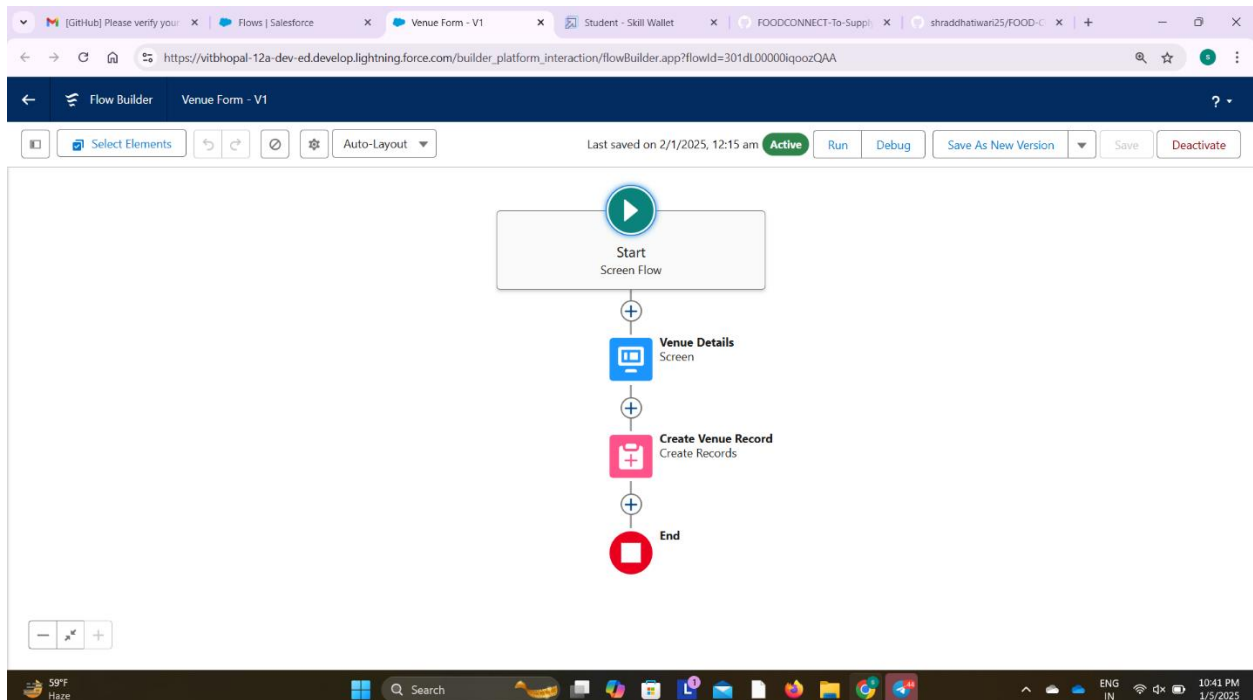
Sharing rules define which users or groups can access certain records.

Steps:

1. Go to Setup → Sharing Settings.
2. Scroll to Drop-Off Point Sharing Rules.
3. Create rules:

Rule 1: Distance < 15 → Share with Public Group Iksha.

Rule 2: $15 < \text{Distance} \leq 30$ → Share with Public Group NSS.



V. Object Manager – Fields & Relationships

Venue Object

Contact Email (Email, Required)

Contact Phone (Phone, Required)

Location (Geolocation, 4 decimal places)

Venue Location (Long Text Area)

The screenshot shows the Salesforce Object Manager interface for the 'Venue' custom object. The browser address bar indicates the URL: <https://vitbhopal-12a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dL000003DXG1/edit?address=%2F01dL000003DXG1%2Fe%3FretURL%3D%252Fsetup%252F...>. The page title is 'Venue' under the 'Object Manager' tab. The left sidebar lists various configuration options: 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, and List View Button Layout. The main content area is titled 'Edit Custom Object Venue' and contains the 'Custom Object Definition Edit' section. This section includes fields for 'Label' (Venue), 'Plural Label' (Venues), 'Object Name' (Venue), and a 'Description' text area. It also features a 'Starts with vowel sound' checkbox and a 'Context-Sensitive Help Setting' section with two radio button options: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'. A 'Required Information' icon is visible in the top right corner of the main content area. The bottom of the screen shows a Windows taskbar with the date and time as 8:36 PM on 1/5/2025.

Setup > OBJECT MANAGER
Venue

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
- List View Button Layout

Edit Custom Object
Venue

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Help for this Page

FUL - IPS
Live - H2

Search

ENG
IN

8:36 PM
1/5/2025

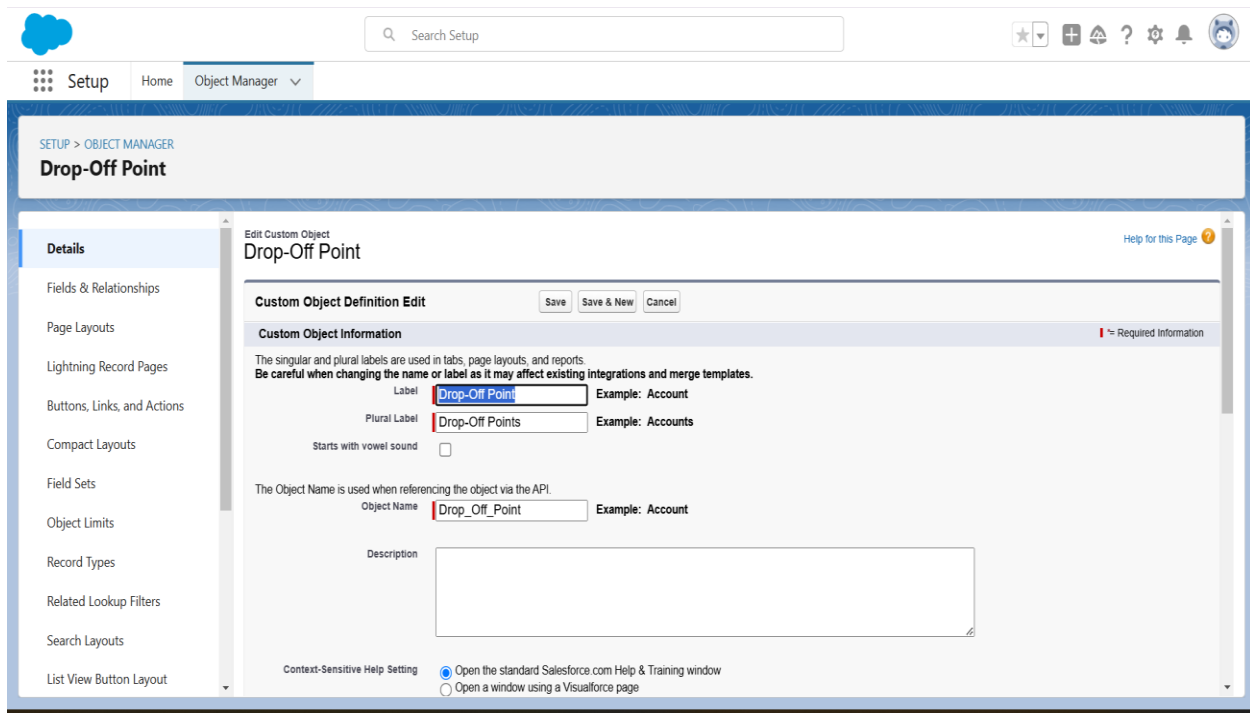
Drop-Off Point Object

Location 2 (Geolocation, 4 decimals)

Distance Calculation (Formula):

`DISTANCE(Location_2_c, Venuer.Location_c, "km")`

State (Picklist with Indian States/UTs, Required)



The screenshot shows the Salesforce Setup interface for the 'Drop-Off Point' custom object. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area is titled 'Drop-Off Point' and contains the 'Custom Object Definition Edit' form. The form includes fields for 'Label' (Drop-Off Point), 'Plural Label' (Drop-Off Points), 'Object Name' (Drop_Off_Point), and a 'Description' text area. A warning message states: 'Be careful when changing the name or label as it may affect existing integrations and merge templates.' The 'Context-Sensitive Help Setting' is set to 'Open the standard Salesforce.com Help & Training window'.

Setup > OBJECT MANAGER

Drop-Off Point

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
- List View Button Layout

Edit Custom Object

Drop-Off Point

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Task Object

Distance (Number, length 14, 4 decimals, Required)

Task ID (Auto Number, format TASK-{0}, Required)

Date (Date, Required)

Food Category (Multi-select Picklist: Veg, Non-Veg, Salad, Snack)

Number of People Served (Number, Required)

Name of the Person (Text)

Phone (Phone)

Rating (Picklist: 1, 2, 3, 4, 5)

Feedback (Long Text Area)

Volunteer Object

Volunteer ID (Auto Number, Required)

Gender (Picklist: Male, Female)

Available On (Date, Required)

Age (Number, Required)

Email (Email, Required)

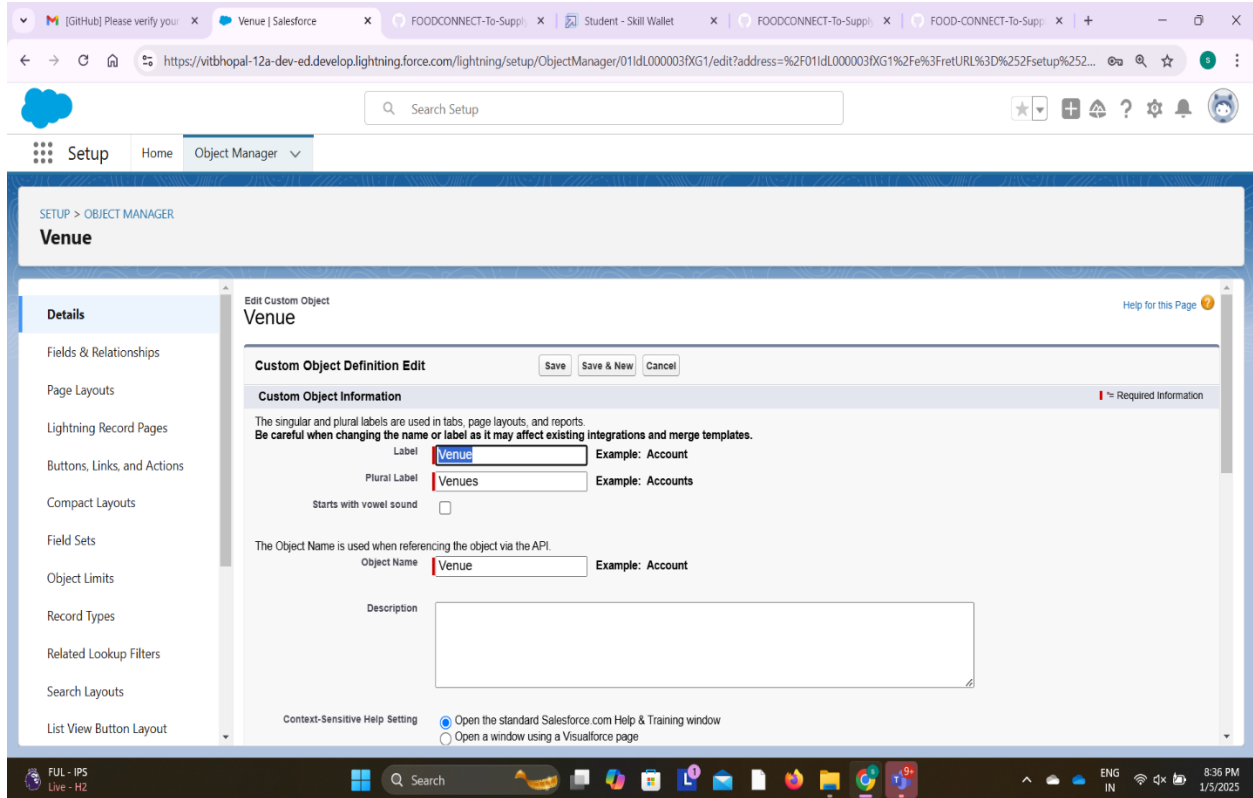
Contact Number (Number, Required)

Address (Long Text Area)

Date of Birth (Date)

Execution Details Object

Execution ID (Auto Number, Required)



VI. Automation Using Flows

Example: Flow to create Venue records

1. Go to Setup → Flows → New Flow → Screen Flow.

2. Add a Screen Element:

Label: Venue Details

Components:

Venue Name (Text)

Email (Email)

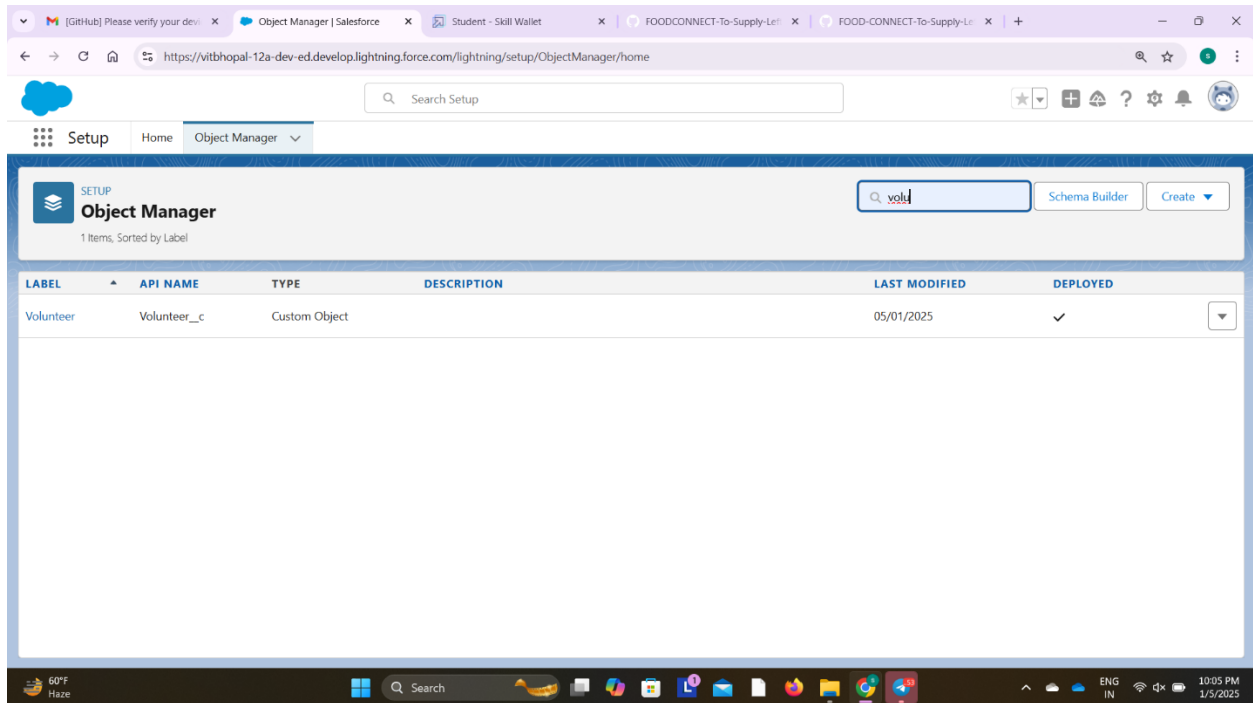
Phone (Phone)

Venue Location (Text)

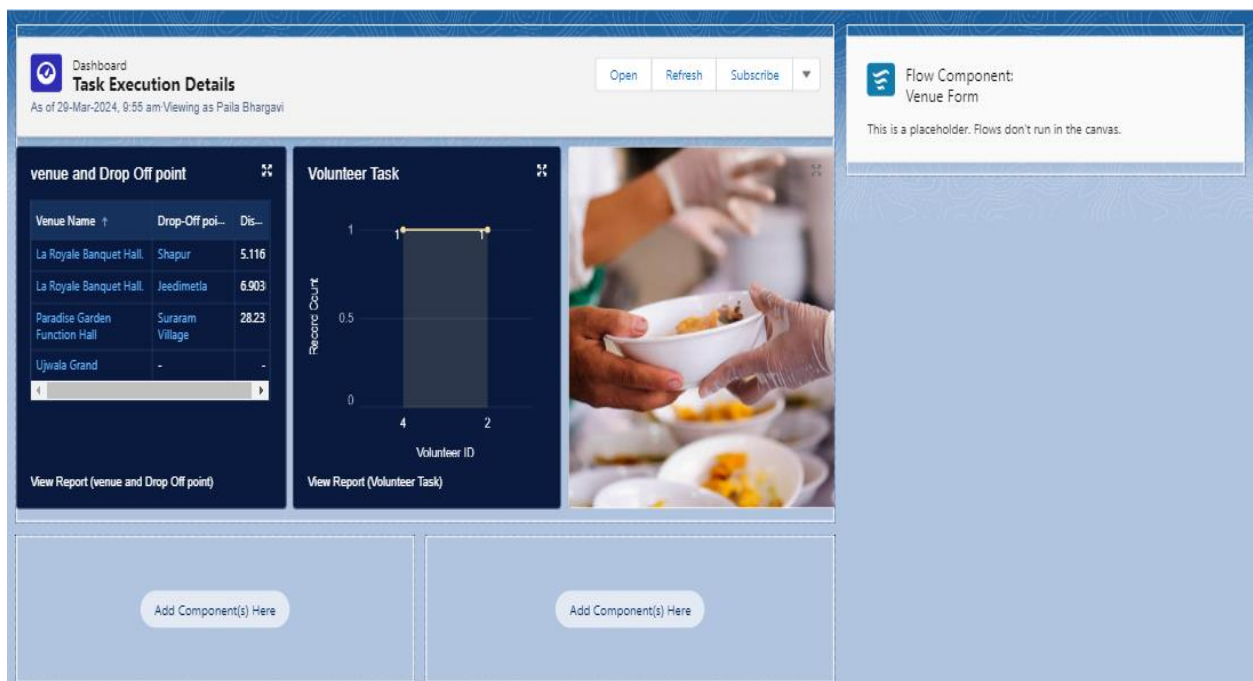
Latitude (Number, 4 decimals)

Longitude (Number, 4 decimals)

Save and Connect with Create Record Element to insert new Venue.



Go to setup >> type Lightning App Builder in quick find box >> Click on the Lightning App Builder and Select the New.

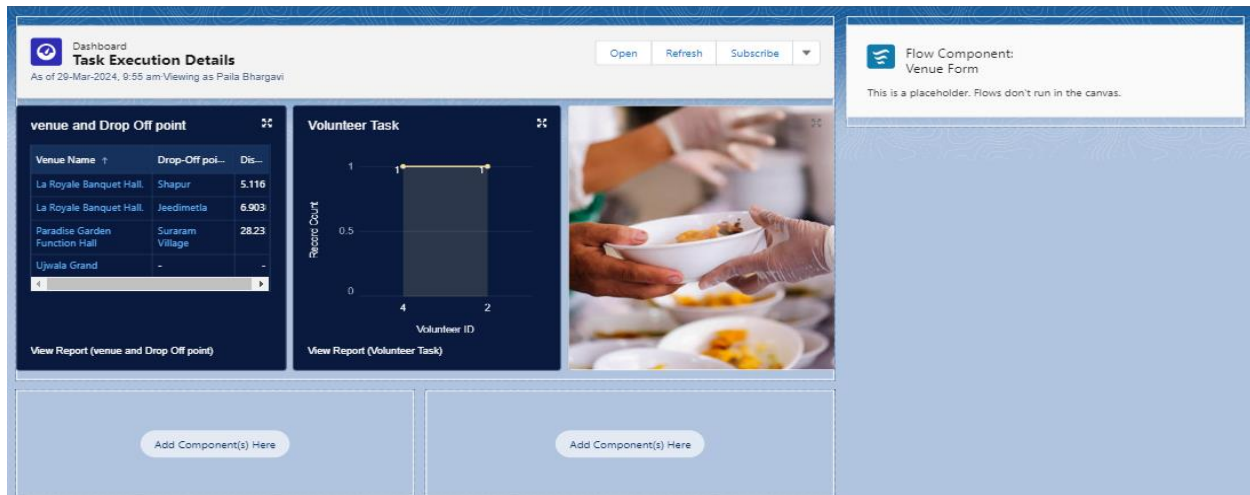


Creation of Home Page

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.



FoodConnect

Home

Venues

Tasks

Drop-Off points

Execution Details

Volunteers

Reports

Dashboards

Search...



Dashboard

Task Execution Details

As of 29-Mar-2024, 9:55 am Viewing as Palla Bhargavi

Open

Refresh

Subscribe

venue and Drop Off point

Venue Name ↑	Drop-Off poin...	Dis...
La Royale Banquet Hall,	Shapur	5.116
La Royale Banquet Hall,	Jeedimetla	6.903
Paradise Garden Function Hall	Suraram Village	28.23
Ujwala Grand	-	-

View Report (venue and Drop Off point)

Volunteer Task



View Report (Volunteer Task)



Venue Form

Venue Name

Email

you@example.com

Phone

Venue Location

Next