

To Supply Leftover Food to Poor

College: PPG Institute of Technology

College Code: 7125

Team ID: NM2024TMID17257

Team Members	NM ID
Kathir R	420E4B6960ADD83B6854468310751581
Manikandan M	8F27F0CEE2C233DA0D2413FB18378414
Yogesh Kumar S	5B0EE75318D59C5A50940C56EEB0EED8
Ramkumar K	FDD3F0981527EA8BE724E87A27A21C8E

GitHub Repo: <https://github.com/Kathir-eng/To-Supply-Leftover-Food-to-Poor.git>

Demo Video link: <https://youtu.be/t3Vhk4Dly0>

1. User Story:

The project "To supply leftover food to the poor" aims to leverage the Salesforce platform to streamline the process of collecting surplus food from various sources and distributing it to those in need. By utilizing Salesforce's robust features and functionalities, the project intends to create an efficient and transparent system for managing food donations, coordinating with volunteers, and ensuring timely delivery to beneficiaries.

2. Project Overview :

The primary objective of this project is to create a platform leveraging Salesforce technology to efficiently connect surplus food from various sources with organizations or individuals in need. This initiative aims to minimize food wastage and alleviate hunger by facilitating the redistribution of excess food to those who are food insecure.

Project Flow:

Milestone 1 : Salesforce developer Account Creation

Milestone 2 : Object

Milestone 3 : Tabs

Milestone 4 : The Lightning App

Milestone 5 : Fields

Milestone 6 : Flows

Milestone 7 : Trigger

Milestone 8 : Profiles

Milestone 9 : Creation of Users

Milestone 10 : Public Groups

Milestone 11 : Reports Types

Milestone 12 : Reports

Milestone 13 : Dashboards

Milestone 14 : Sharing Rules

Milestone 15 : Home Page

Milestone 16 : Conclusion

Milestone 1-Salesforce developer account creation :

Activity 1:

Creating Developer Account: Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>

Sign up for your Salesforce Developer Edition
A Salesforce Platform environment for free.
Complete the form to get access to the Salesforce Developer Edition.

First Name* Kathir R

Email* kathir2004@gmail.com

Role* Developer

Company* PPG Institute of Technology

Country/Region* India

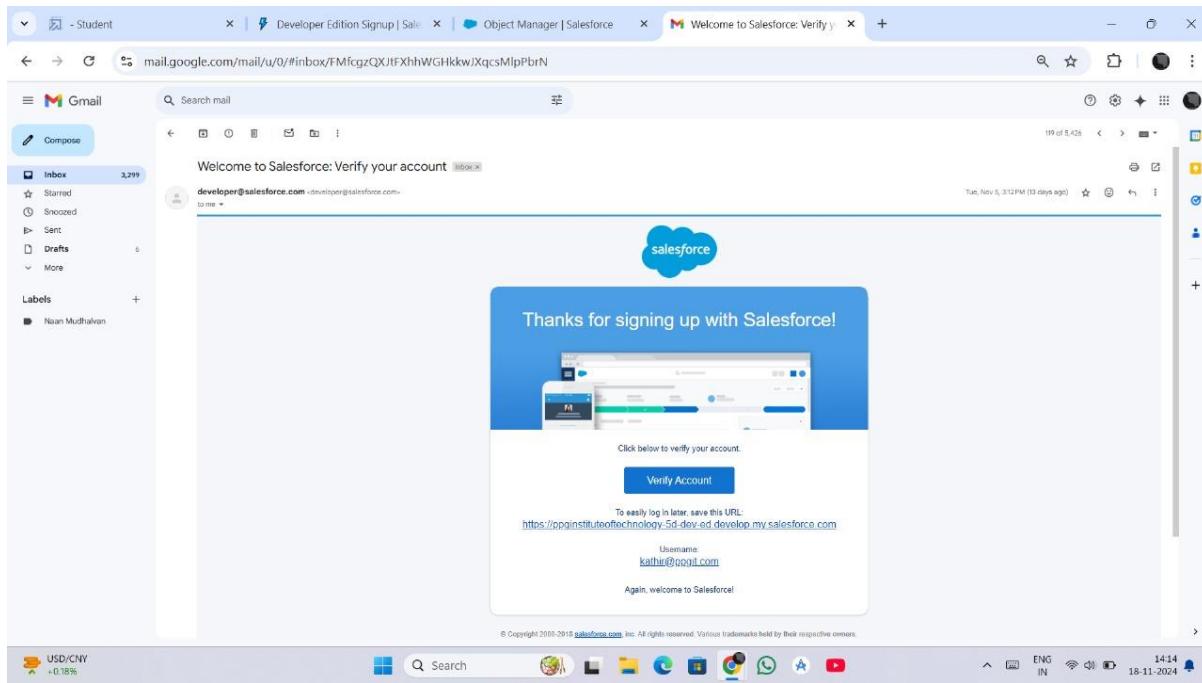
State/Province* Tamil Nadu

Postal Code* 641035

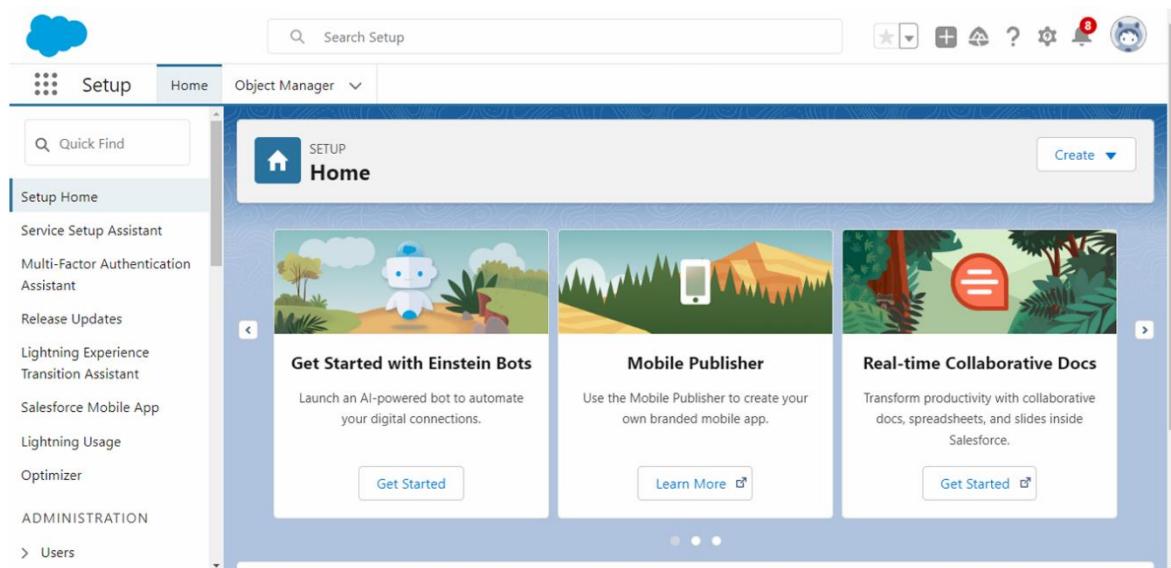
Username* Kathir@ppgit.com

Activity 2: Account Activation:

After signing up, I activated my Salesforce Developer Account by verifying my email. I clicked on the "Verify Account" link, set a secure password, and answered a security question. Upon completing these steps, I was redirected to the Salesforce setup page, successfully enabling access to the platform's features.



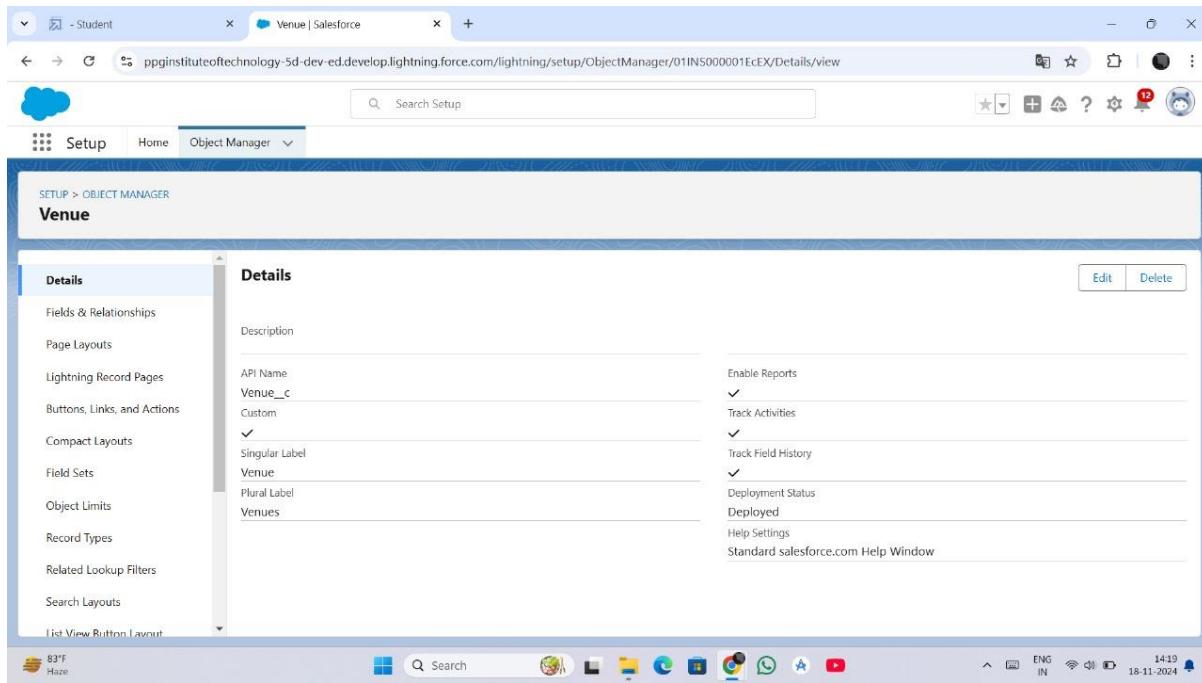
Home Page:



Milestone 2- Object :

For the "**To Supply Leftover Food to the Poor**" project, we use custom objects in Salesforce to manage the data effectively. Below are the steps to create and configure the required objects for the project.

1.Venue Object:



The **Venue Object** stores information about the locations providing leftover food, such as restaurants or event spaces. This object includes fields like:

- **Venue Name:** The name of the food donor.
- **Address:** Location of the venue.
- **Contact Information:** Point of contact for coordination.

By creating this object, we centralize details about food sources, making it easier to track and manage donors.

2. Drop-Off Point Object:

The screenshot shows the Salesforce Setup interface with the title 'Drop-Off Point | Salesforce'. The main area displays the 'Details' tab for the 'Drop-Off Point' object. On the left, a sidebar lists various setup categories like Fields & Relationships, Page Layouts, and Lightning Record Pages. The main details pane includes fields for API Name ('Drop_Off_Point__c'), Singular Label ('Drop-Off Point'), Plural Label ('Drop-Off Points'), and several checkboxes for reports and activities. Buttons for 'Edit' and 'Delete' are at the top right. The status bar at the bottom shows system information including the date (18-11-2024) and time (14:18).

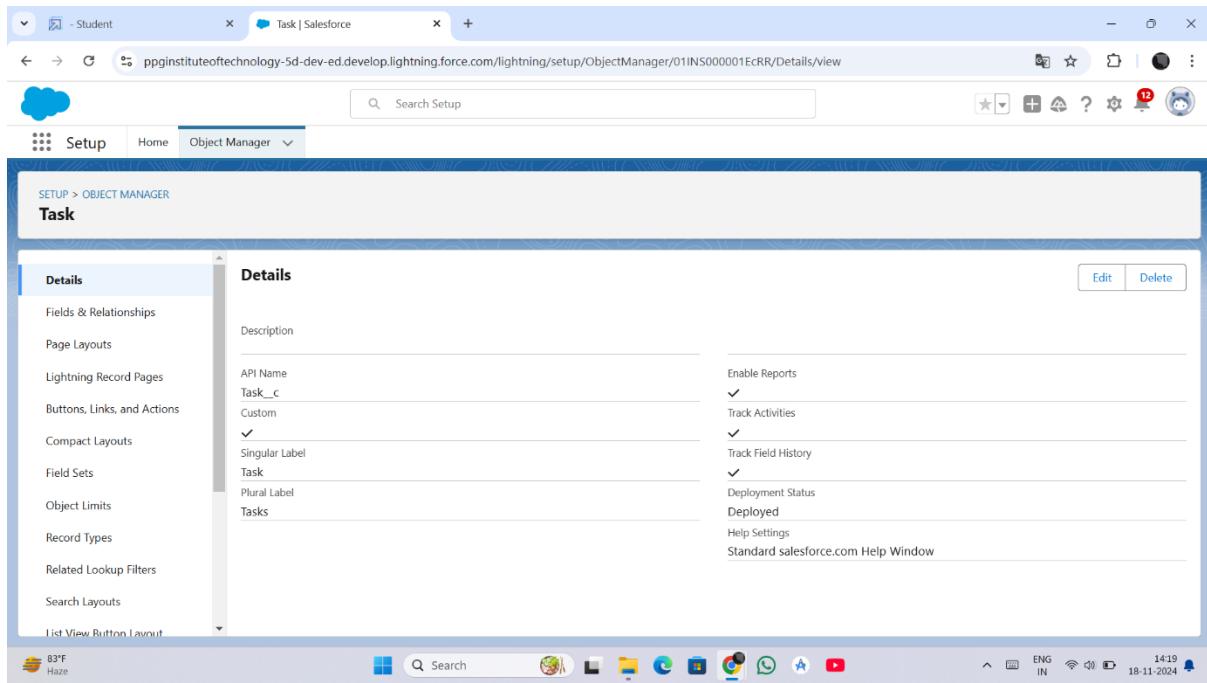
The **Drop-Off Point Object** represents locations where food will be delivered for further distribution to the needy. It includes fields such as:

- **Location:** Address or area of the drop-off point.
- **Capacity:** Amount of food it can accommodate.
- **Contact Details:** To manage logistics at the drop-off point.

3. Task:

The **Task Object** is used to manage actions required in the project, such as food pickup, delivery, and coordination activities. Fields like:

- **Task Name:** Title of the task (e.g., "Food Pickup from Venue A").
- **Assigned To:** Volunteer or team handling the task.
- **Deadline:** To track task completion timelines.



4. Volunteer Object

The **Volunteer Object** keeps details about the individuals participating in the project.

Key fields include:

- **Name:** Name of the volunteer.
- **Contact Number and Email:** For communication purposes.
- **Availability:** To assign tasks based on their schedule.
- **Assigned Tasks:** Tasks linked to the volunteer.

This object streamlines volunteer management and enables efficient task assignment.

The screenshot shows the Salesforce Setup interface with the URL ppginstuteoftechnology-5d-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS00001EcjB/Details/view. The page title is "Volunteer". The left sidebar lists various configuration options under "Details". The main "Details" section shows the API Name as "Volunteer__c" and the singular label as "Volunteer". On the right, there are checkboxes for "Enable Reports", "Track Activities", "Track Field History", "Deployment Status" (set to "Deployed"), and "Help Settings". The status bar at the bottom indicates it's 14:20 on 18-11-2024.

5. Execution Detail Object

The screenshot shows the Salesforce Setup interface with the URL ppginstuteoftechnology-5d-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS00001EcjT/Details/view. The page title is "Execution Detail". The left sidebar lists various configuration options under "Details". The main "Details" section shows the API Name as "Execution_Detail__c" and the singular label as "Execution Detail". On the right, there are checkboxes for "Enable Reports", "Track Activities", "Track Field History", "Deployment Status" (set to "Deployed"), and "Help Settings". The status bar at the bottom indicates it's 14:20 on 18-11-2024.

The **Execution Detail Object** tracks the progress and completion of activities, ensuring transparency and accountability. It includes fields such as:

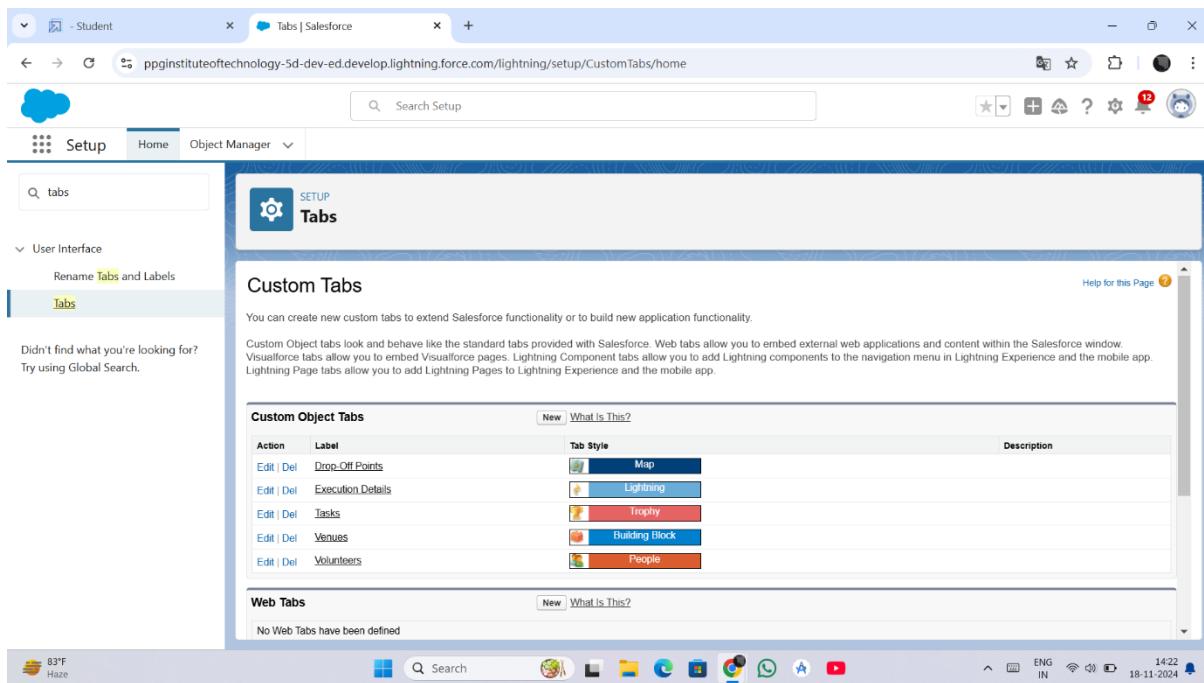
- **Execution ID:** Unique identifier for each execution instance.
- **Venue and Volunteer:** Details about the source and person responsible.

- **Drop-Off Point:** Delivery location.
- **Completion Status:** Indicates whether the activity is complete.
- **Date & Time:** Timestamp for better tracking.

This object provides a comprehensive overview of the project's execution and helps monitor its success.

Milestone 3 :Tab Creation in Salesforce:

Tabs in Salesforce provide a user-friendly way to access and interact with data stored in custom objects. For the "**To Supply Leftover Food to the Poor**" project, we create custom tabs for each object to simplify navigation and data management.



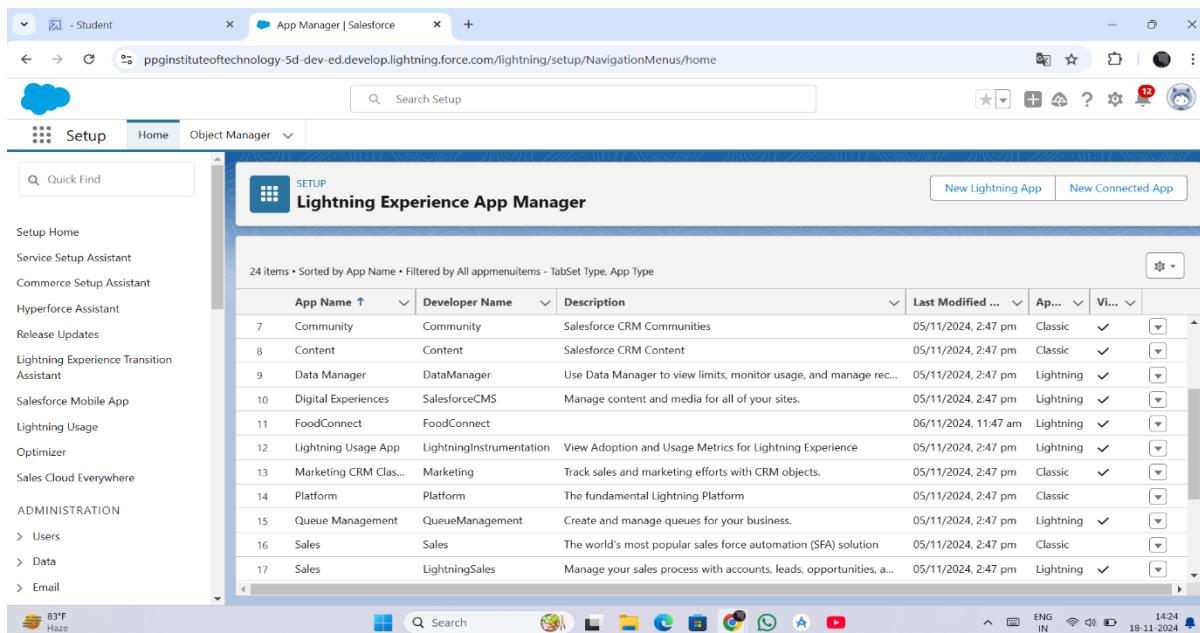
Creating Tabs for All Objects

- **Venue Tab:** Provides access to details of all venues donating food.
- **Drop-Off Point Tab:** Displays information about food distribution points.
- **Task Tab:** Allows users to view and manage all assigned tasks.
- **Volunteer Tab:** Centralized location for managing volunteer data.

- **Execution Detail Tab:** Shows the execution history and progress of the project activities.

Milestone 4: Creating a Lightning App and Lightning App Page:

In Salesforce, Lightning Apps enhance the user experience by providing an intuitive interface to manage data and processes. For the "**To Supply Leftover Food to the Poor**" project, we will create a custom Lightning App and a Lightning App Page to centralize operations.



Create a Lightning App

Step 1: Navigate to App Manager

1. Log in to Salesforce and go to **Setup**.
2. In the **Quick Find** box, search for **App Manager** and select it.

Step 2: Create a New Lightning App

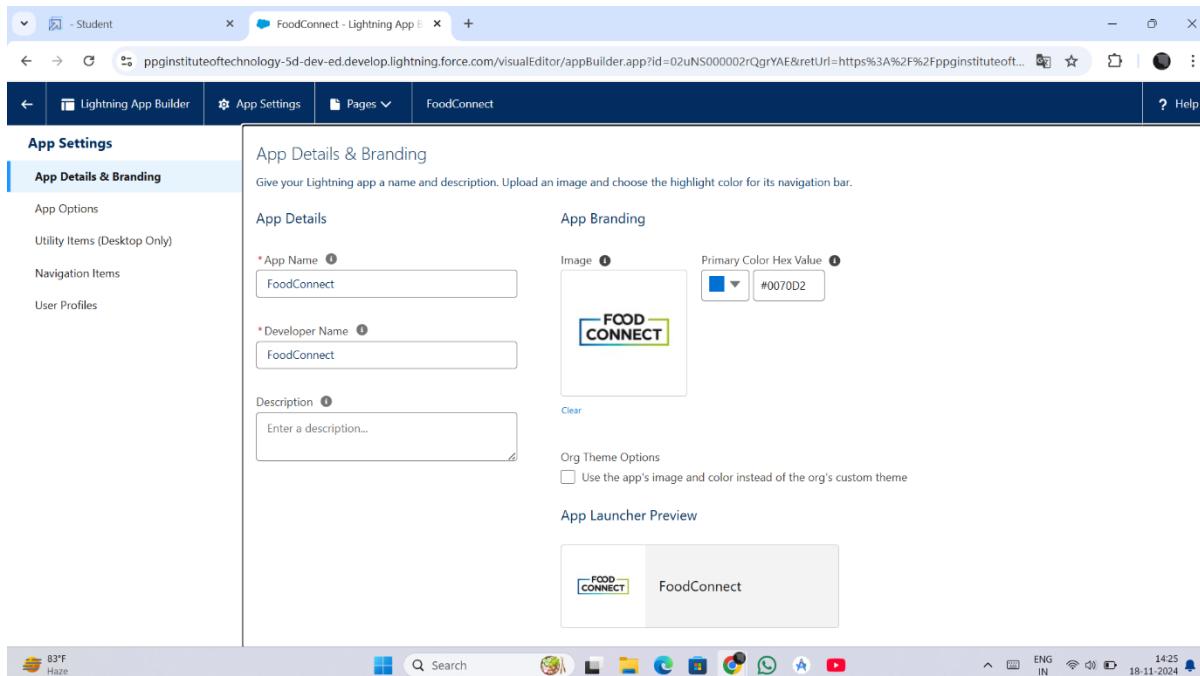
1. Click the **New Lightning App** button in the App Manager.
2. Enter the following details:
 - **App Name:** To Supply Leftover Food to Poor

- **Developer Name:** Automatically populated, or enter a unique identifier.

Description: A platform to manage leftover food collection and distribution

Milestone 4: Create a Lightning App Page:

A Lightning App Page organizes essential data and components for streamlined workflows.



Step 1: Navigate to App Builder

1. From **Setup**, search for **Lightning App Builder** in the **Quick Find** box.
2. Click **New** and select **App Page** as the type of Lightning page.

Step 2: Design the Layout

1. Choose a layout template for the app page, such as:
 - **Single Region:** For a simple page.
 - **Two or Three Columns:** To display multiple components side by side.
2. Click **Next** to proceed.

Step 3: Add Components to the Page

1. Drag and drop components into the layout. Include:
 - **Tabs or Lists:** For objects like Venues, Drop-Off Points, etc.
 - **Charts and Dashboards:** To display reports on food collected and distributed.
 - **Record Details:** To view detailed information for selected records.
2. Customize each component's settings to display relevant data.

Step 4: Save and Activate the Page

1. Save the app page and click **Activate**.
2. Assign the page to a specific app or make it the default home page for selected profiles.

Milestone 5: Creation of Relationship Fields in Objects.

Relationship fields in Salesforce are used to establish connections between objects, enabling seamless data integration and better data management. For the "**To Supply Leftover Food to the Poor**" project, various relationship fields are created to link objects effectively. Below are the steps for each relationship creation:

1. Creation of Master-Detail Relationship Field on Volunteer Object

1. Go to **Setup** and click **Object Manager**.
2. Search for **Volunteer** in the search bar and select the object.
3. Click on **Fields & Relationships**, then click **New**.
4. Select **Master-Detail Relationship** and click **Next**.
5. Choose the related object **Drop-Off Point** and click **Next**.
6. Enter the following details:
 - **Field Name:** Drop_Off_Point
 - **Field Label:** Auto-generated.
7. Click **Next >> Next >> Save**.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar has tabs for 'Student' and 'Volunteer | Salesforce'. The main title is 'SETUP > OBJECT MANAGER Volunteer'. On the left, a sidebar lists various setup categories. The central area is titled 'Fields & Relationships' and displays a table of fields for the 'Volunteer' object. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed include Address, Age, Available On, Contact Number, Created By, Date of Birth, Drop-Off Point, Execution ID, Gender, Last Modified By, Owner, and Volunteer ID. The 'INDEXED' column shows checkboxes for each row.

2. Creation of Master-Detail Relationship Field on Execution Details Object (Volunteer)

1. Go to **Setup** and click **Object Manager**.
2. Search for **Execution Details** in the search bar and select the object.
3. Click on **Fields & Relationships**, then click **New**.
4. Select **Master-Detail Relationship** and click **Next**.
5. Choose the related object **Volunteer** and click **Next**.
6. Enter the following details:
 - **Field Name:** Volunteer
 - **Field Label:** Auto-generated.
7. Click **Next >> Next >> Save**.

- Student Drop-Off Point | Salesforce +

ppginstuteoftechnology-5d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000001EcPp/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

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

Fields & Relationships
9 Items, Sorted by Field Label

Distance	Distance_c	Number(14, 4)	▼
distance calculation	distance_calculation_c	Formula (Number)	▼
Drop-Off Point Name	Name	Text(80)	▼
Last Modified By	LastModifiedByld	Lookup(User)	▼
Location 2	Location_2_c	Geolocation	▼
Owner	OwnerId	Lookup(User,Group)	▼
State	State_c	Picklist	▼
Venue	Venue_c	Lookup(Venue)	▼

82°F Haze 14:29 18-11-2024

- Student Execution Detail | Salesforce +

ppginstuteoftechnology-5d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000001EcUT/FieldsAndRelationships/view

Search Setup

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 List View Button Layout

Fields & Relationships
5 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedByld	Lookup(User)		▼
Execution Detail Name	Name	Text(80)		▼
Last Modified By	LastModifiedByld	Lookup(User)		▼
Task	Task_c	Master-Detail(Task)		▼
Volunteer	Volunteer_c	Master-Detail(Volunteer)		▼

High UV Now 14:32 18-11-2024

The screenshot shows the Salesforce Object Manager interface for the 'Task' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main content area is titled 'Fields & Relationships' and displays 16 items sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. Key fields shown include Date, Distance, Drop-Off Point, Feedback, Food Category, Last Modified By, Name of the Person, Number of People Served, Owner, Phone, Rating, Sponsored By, Task ID, Task Name, and Venue.

The screenshot shows the Salesforce Object Manager interface for the 'Venue' object. The left sidebar lists various setup categories. The main content area is titled 'Fields & Relationships' and displays 8 items sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. Key fields shown include Contact Email, Contact Phone, Created By, Last Modified By, Location, Owner, Venue Location, and Venue Name.

Milestone 6: Creation of a Flow to Create a Record in the Venue Object.

Flows in Salesforce provide a user-friendly way to automate processes without extensive coding. For the "**To Supply Leftover Food to the Poor**" project, we will create a flow that allows users to create a new record in the **Venue** object. This ensures data entry is streamlined and consistent.

Steps to Create the Flow

Step 1: Navigate to Flow Builder

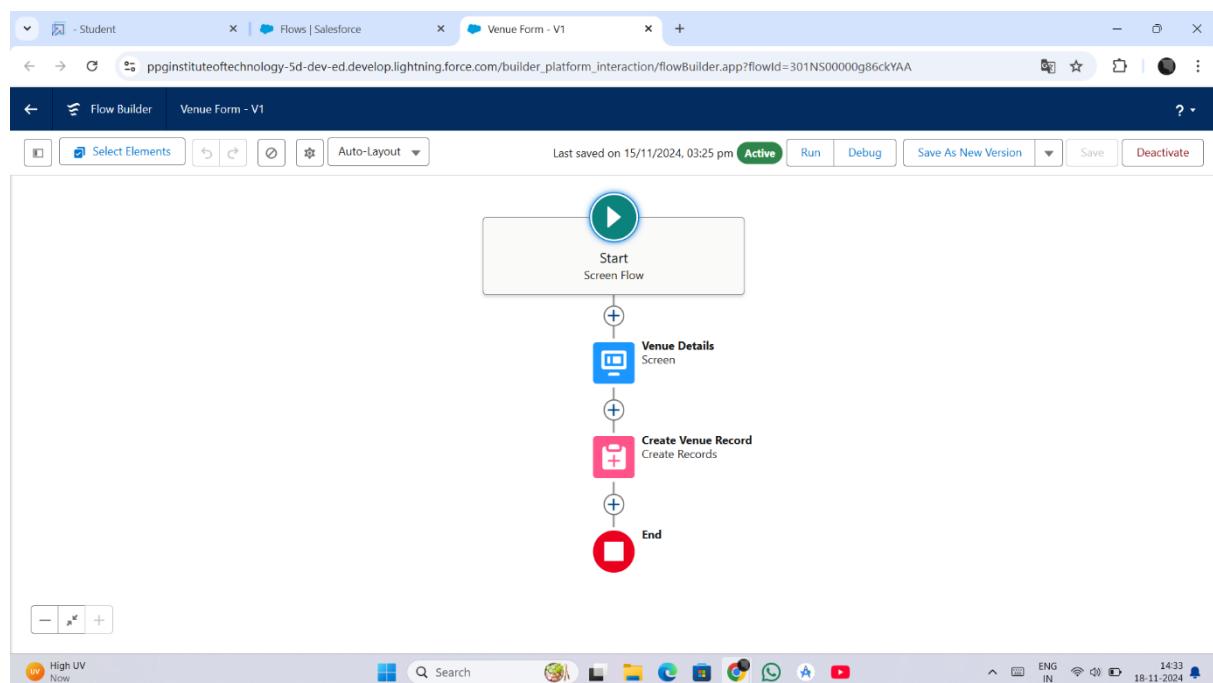
1. Log in to your Salesforce Developer account.
2. Go to **Setup**, and in the **Quick Find** box, search for **Flows**.
3. Click **Flows** under **Process Automation** and then click **New Flow**.

Step 2: Select Flow Type

1. Choose **Screen Flow** to create an interactive flow for users.
2. Click **Create** to open the Flow Builder.

Step 3: Add a Screen Element

1. Drag the **Screen** element from the toolbox onto the canvas.
2. Configure the screen to collect data for the **Venue** object:
 - o Add fields for **Venue Name**, **Address**, **Contact Number**, and any other required fields.
 - o Use components like **Text**, **Phone**, or **Email** based on the field types.
3. Provide a name for the screen, e.g., **Enter Venue Details**, and click **Done**.



Step 4: Add a Create Records Element

- Drag the **Create Records** element onto the canvas, following the screen element.
- Configure the **Create Records** element:
 - **Label:** Create Venue Record.
 - **Create a Record For:** Select **Venue**.
 - **How to Set Record Fields:** Choose **Use separate resources and literal values**.
- Map the inputs from the screen to the Venue object fields. For example:
 - **Venue Name** → Screen Input: Venue Name
 - **Address** → Screen Input: Address
 - **Contact Number** → Screen Input: Contact Number
- Click **Done**.

Step 5: Connect Elements

1. Connect the **Start** element to the **Screen** element.
2. Connect the **Screen** element to the **Create Records** element.

Step 6: Save and Activate the Flow

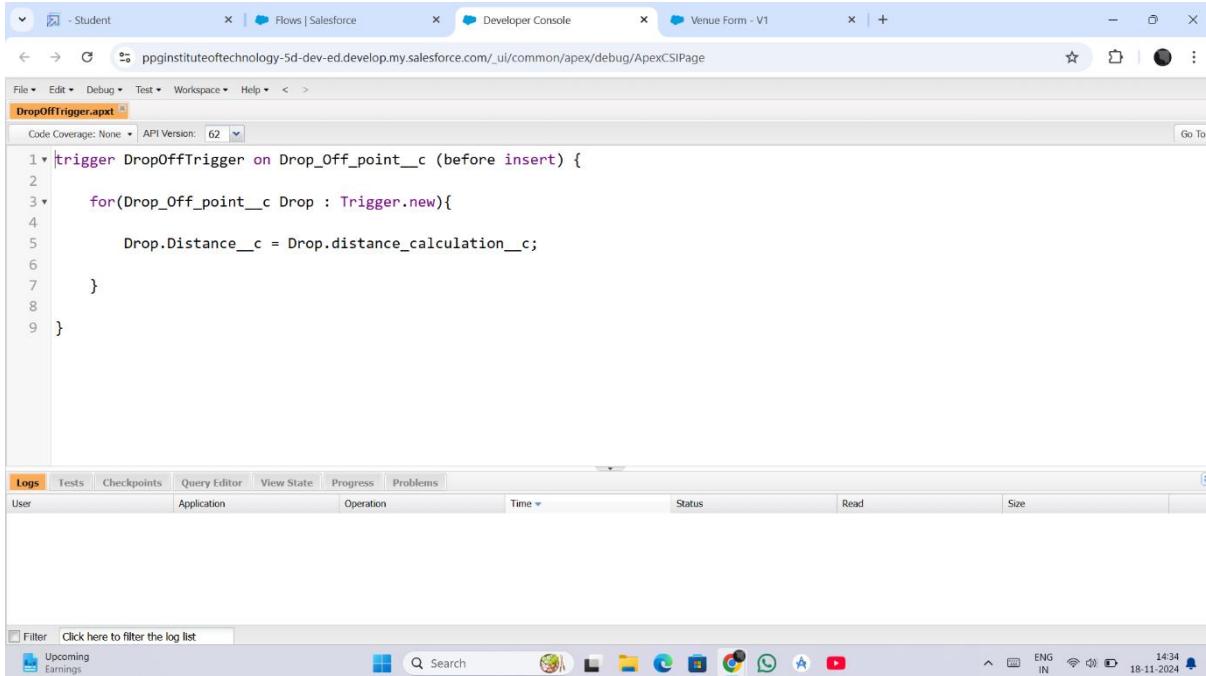
1. Click **Save** and provide a name for the flow, e.g., **Create Venue Record Flow**.
2. Click **Activate** to make the flow available for use.

Milestone 7: Creation of a Trigger in Salesforce

A **trigger** in Salesforce is an Apex script that executes before or after specific events occur on a record. For the "**To Supply Leftover Food to the Poor**" project, we will create a trigger to automate actions based on operations performed on an object.

(This Trigger is to assign Distance field to the Distance Calculation field. So that we can assign the distance in the sharing rules.)

```
trigger DropOffTrigger on Drop_Off_point__c (before insert) {  
    for(Drop_Off_point__c Drop : Trigger.new){  
        Drop.Distance__c = Drop.distance_calculation__c;  
    }  
}
```



The screenshot shows the Salesforce Developer Console interface. The top navigation bar includes tabs for 'Flows | Salesforce', 'Developer Console', and 'Venue Form - V1'. Below the navigation is a toolbar with file operations like 'File', 'Edit', 'Debug', 'Test', 'Workspace', and 'Help'. A dropdown menu shows 'DropOffTrigger.apxt' is selected. The main area displays the Apex 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;  
    }  
}
```

Below the code editor is a 'Logs' tab, which is currently active. It shows a table with columns: User, Application, Operation, Time, Status, and Size. There are no logs listed. At the bottom of the interface is a Windows taskbar with various icons.

Explanation:

- The above example ensures that the **Contact Number** field is not left blank when creating or updating a Venue record.
- Use **Trigger.new** to access the new values of the record.

Step 5: Save and Test the Trigger

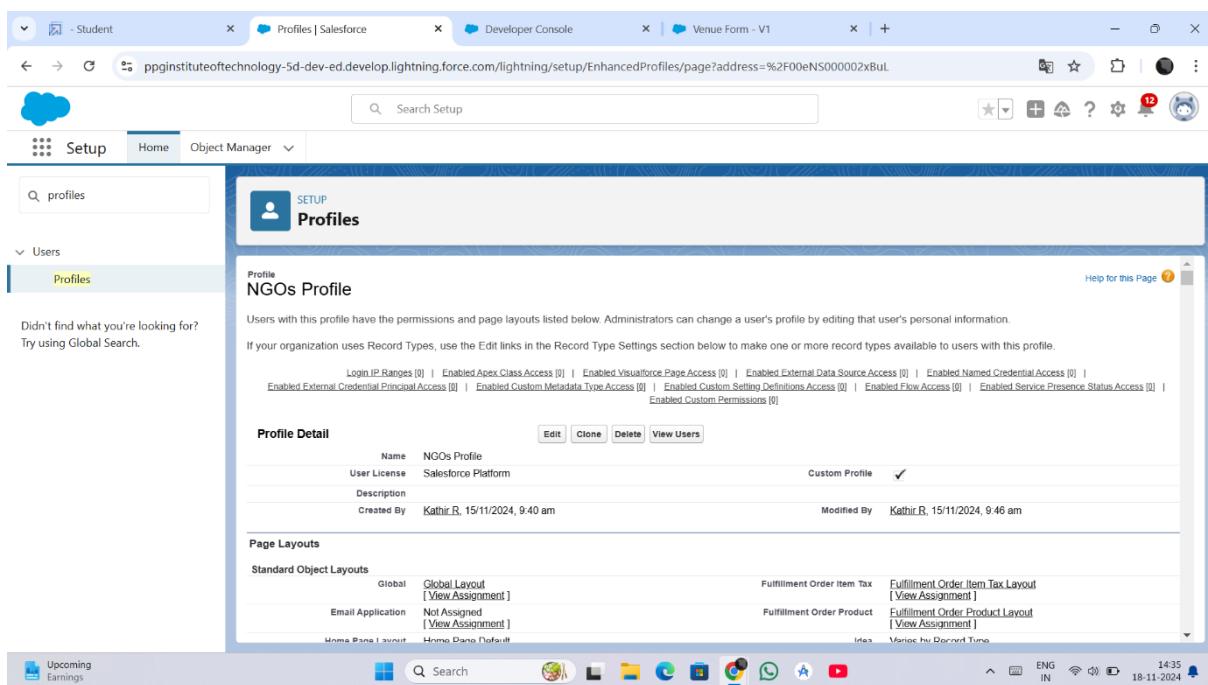
1. Save the trigger in the Developer Console.
2. Navigate to the **Venue** object (or the selected object) and try creating or updating a record to test the trigger's functionality.

Milestone 8: Creation of Profiles in Salesforce

Profiles in Salesforce are used to define the level of access and permissions a user has for data and features. For the "**To Supply Leftover Food to the Poor**" project, we will create a custom profile for NGOs to manage their activities efficiently while ensuring data security and access control.

1. Creation of User 1 (NGO Manager)

1. On the **Users** page, click **New User**.
2. Creating a NGOs Profile by cloing the standard user.
3. Click **Save**.



Milestone 9: Creation of Users

Creation of users in Salesforce involves setting up individual user accounts with specific roles, permissions, and profiles that align with the goals and structure of the project. It ensures that members of your team or stakeholders have access to the Salesforce platform with the appropriate level of access to perform their tasks. For a project like an NGO management system, this process is critical for defining access and responsibilities.

1. Created custom profiles such as Donor Manager and Volunteer Manager.
2. Assigned permissions for accessing, editing, or viewing specific objects.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty@00dns000005idj2a4.lfmh1ch6ca81@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	Iksa_Foundation, Iksa Foundation	iksh	ikashfoundation@24.com		<input checked="" type="checkbox"/>	NGOs Profile
Edit	NSS, NSS	nss	nssred@24.com		<input checked="" type="checkbox"/>	NGOs Profile
Edit	R_Kathir	KR	kathir@ppgit.com		<input checked="" type="checkbox"/>	System Administrator
Edit	Street_Cause, Street_Cause	ssre	streetcause@red.com		<input checked="" type="checkbox"/>	NGOs Profile
Edit	User_Integration	integ	integration@00dns000005idj2a4.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00dns000005idj2a4.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Milestone 10: Public Groups

Purpose: This group is intended for NGO Managers who oversee the overall operation of food distribution.

Action	Label	Group Name	Created By	Created Date
Edit	ikash	ikash	R_Kathir	15/11/2024, 10:34 am
Edit	NSS	NSS	R_Kathir	15/11/2024, 10:35 am
Edit	Street_Cause	Street_Cause	R_Kathir	15/11/2024, 10:36 am

Milestone 11: Report Types

In Salesforce, **Report Types** define the structure and data relationships available for generating reports. For the "**To Supply Leftover Food to the Poor**" project, creating custom report types helps in analyzing critical data such as Venue details, Task assignments, and Volunteer performance.

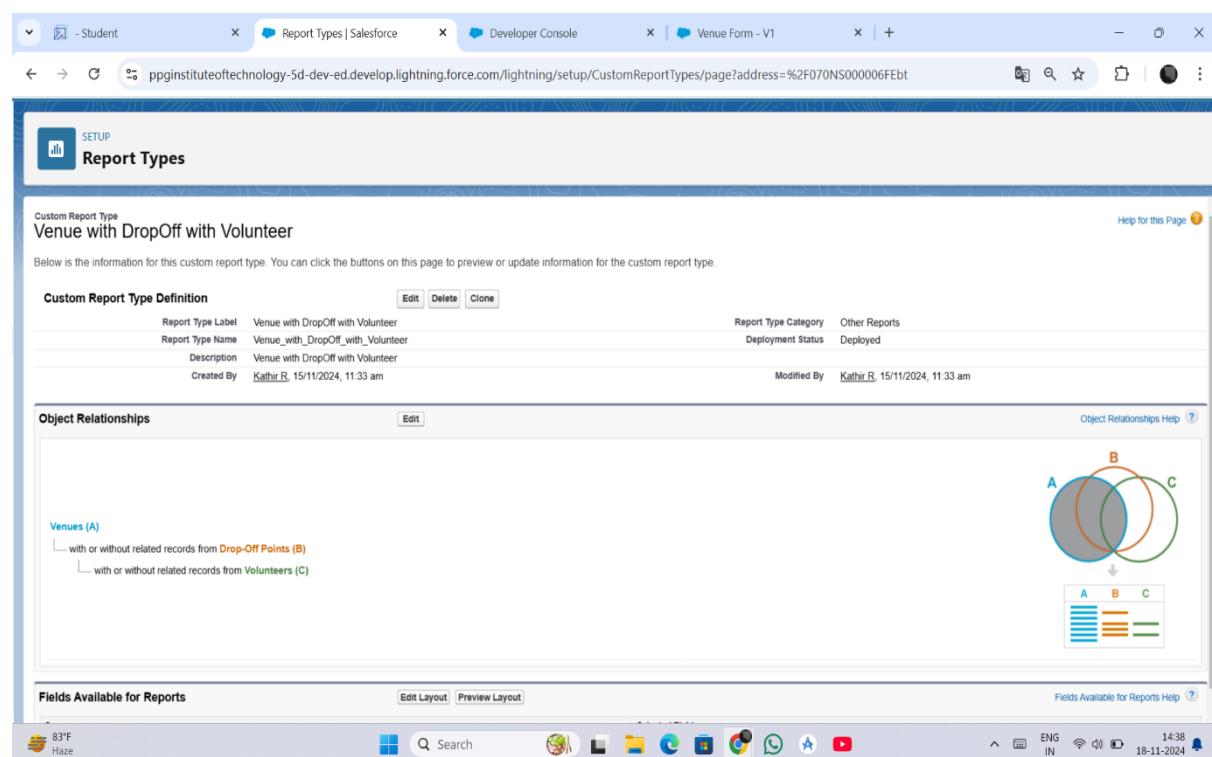
Steps to Create Report Types

Step 1: Navigate to Report Types

1. Log in to Salesforce and go to the **Setup** page.
2. In the **Quick Find** bar, type **Report Types** and select **Report Types** from the results.

Step 2: Click on New Custom Report Type

1. Click the **New Custom Report Type** button.



Step 3: Define the Report Type Details

1. **Primary Object:** Select the primary object for the report (e.g., **Venue**, **Task**, **Volunteer**).
2. **Report Type Label:** Enter a descriptive name for the report type (e.g., **Venue and Drop-Off Points Report**).
3. **Report Type Name:** Automatically generated based on the label.

Milestone 12: Reports

Activity 1: Creation of Reports: Venue with Drop-Off Point and Volunteer.

Reports in Salesforce help visualize and analyze data effectively. For the "**To Supply Leftover Food to the Poor**" project, a report combining Venue, Drop-Off Point, and Volunteer data provides insights into the food distribution network and volunteer participation.

The screenshot shows the Salesforce Report Builder interface. The top navigation bar includes tabs for Student, Report Builder, Developer Console, and Venue Form - V1. The main menu has sections for Home, Venues, Drop-Off Points, Tasks, Volunteers, Execution Details, Reports, and Dashboards. The Reports tab is selected. A sub-menu under Reports shows 'venue and Drop Off point' and 'Venue with DropOff with Volunteer'. The current report is titled 'Venue with DropOff with Volunteer'. The left sidebar shows the 'Fields' section with 'Outline' selected, displaying 'Groups' and 'Columns'. Under Groups, there is a 'Volunteer Name' field. Under Columns, there are fields for 'Venue Name', 'Drop-Off Point Name', and '# Distance'. The center pane displays a preview message: 'Previewing a limited number of records. Run the report to see everything.' It lists filter options: 'Volunteer Name ↑', 'Venue Name ↓', 'Drop-Off Point Name ↓', and 'Distance ↓'. Below this, it says 'No records returned in preview. Try running the report or editing report filters.' with three bullet points: 'Show All venues.', 'Set the Created Date filter to All Time.', and 'Edit other filters in the filter panel.' At the bottom of the preview pane are buttons for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total'. The bottom right corner of the interface shows system status: 83°F Haze, ENG IN, 14:42, and 18-11-2024.

Steps to Create the Report:

Step 1: Navigate to Report Types

3. Log in to Salesforce and go to the **Setup** page.
4. In the **Quick Find** bar, type **Report Types** and select **Report Types** from the results.

Step 2: Click on New Custom Report Type

2. Click the **New Custom Report Type** button.

Step 3: Define the Report Type Details

4. **Primary Object:** Select the primary object for the report (e.g., **Venue**, **Task**, **Volunteer**).
 5. **Report Type Label:** Enter a descriptive name for the report type (e.g., **Venue and Drop-Off Points Report**).
 6. **Report Type Name:** Automatically generated based on the label.
 7. **Description:** Enter a brief description of the report type's purpose (e.g., "Tracks venue details and associated drop-off points").
 8. **Store in Category:** Choose the category where the report type will be saved (e.g., Other Reports).
 9. **Deployment Status:** Set the status to **Deployed** to make the report type available for use.
10. Click **Next**.

Step 4: Define Object Relationships

1. **Add Related Objects:**

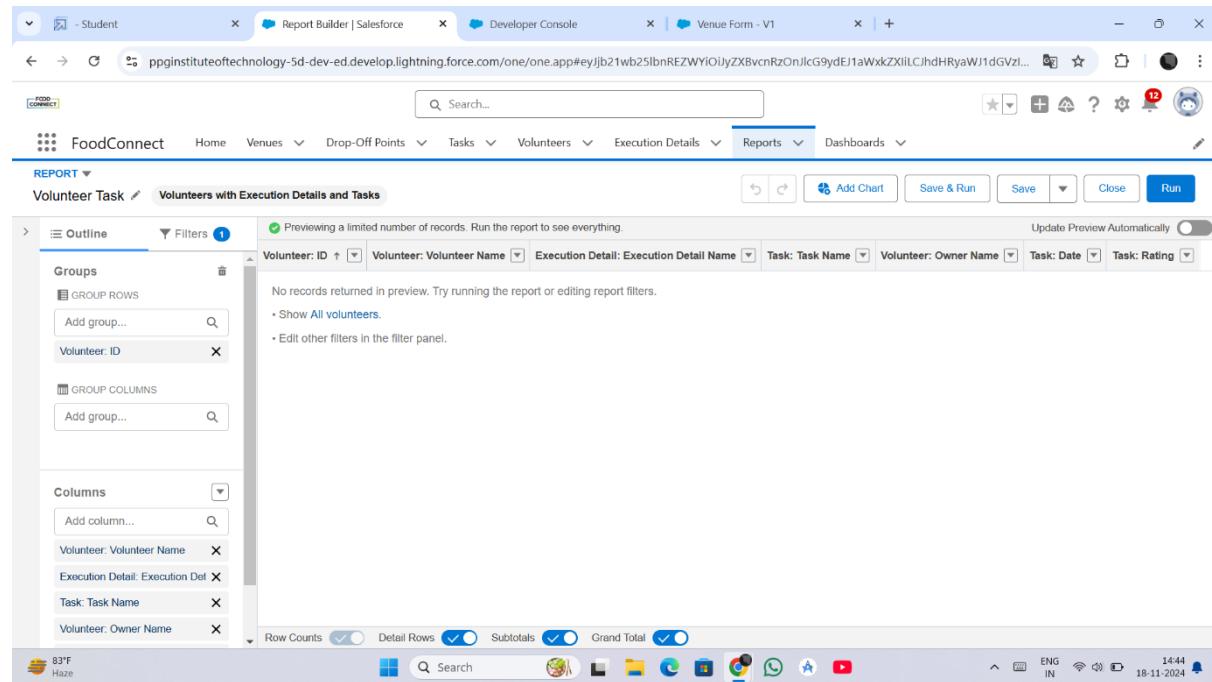
- Select related objects to include additional data in the report. For example:
 - Venue** (Primary Object) with **Drop-Off Point** (Related Object).
- Define the relationship type (e.g., "Each A may or may not have related B").

2. Click **Save**.

Activity 2:

Creation of Report: Volunteers with Execution Details and Tasks

In the "**To Supply Leftover Food to the Poor**" project, creating a report that combines Volunteer data with Execution Details and Tasks helps in tracking volunteer activities, task progress, and execution outcomes.



Steps to Create the Report:

Step 1: Navigate to the Reports Tab

1. Log in to Salesforce.
2. Click on the **App Launcher** and select **Reports**.
3. In the Reports page, click **New Report**.

Step 2: Select a Report Type

1. In the **Choose Report Type** window:
 - Search for and select the **Venue with Drop-Off Point and Volunteer** report type.
 - Click **Continue**.

Step 3: Configure the Report

1. **Add Filters:**
 - Set the filters to include relevant data:
 - **Status:** Active
 - **Date:** Select a date range to filter data (e.g., Current Month).
2. **Add Columns:**
 - Include the following columns to display key data:
 - **Venue Name**
 - **Drop-Off Point Location**
 - **Volunteer Name**
 - **Task Description**
 - **Task Status**
3. **Group Data:**
 - Group the report by **Venue Name** to categorize data by venue.

4. Sort Data:

- Sort the report by **Task Status** or **Drop-Off Point Location** as needed.

Step 4: Save and Run the Report

1. Click **Save & Run** to generate the report.
2. Enter report details:
 - **Report Name:** Venue with Drop-Off Point and Volunteer
 - **Description:** Tracks venues, drop-off locations, and volunteer participation for food distribution.
 - **Folder:** Save the report in a shared folder for access by team members.

Milestone 13: Dashboards

Activity 1: Steps to Add Venue and Drop-Off Point Report to the Dashboard

A **Dashboard** refers to a visual interface or a consolidated page within the **FoodConnect** application that presents data and reports in an organized and interactive manner. It is designed to help users analyze key metrics, track performance, and make data-driven decisions effectively.

In the "**Food Connect**" project, adding a **Venue and Drop-Off Point Report** to a Salesforce Dashboard enables project stakeholders to have a visual and real-time overview of the distribution venues and drop-off points. This helps in tracking the status and improving the operational efficiency of the food distribution process.

1. Navigate to Dashboards:

- Open the **FoodConnect** app.

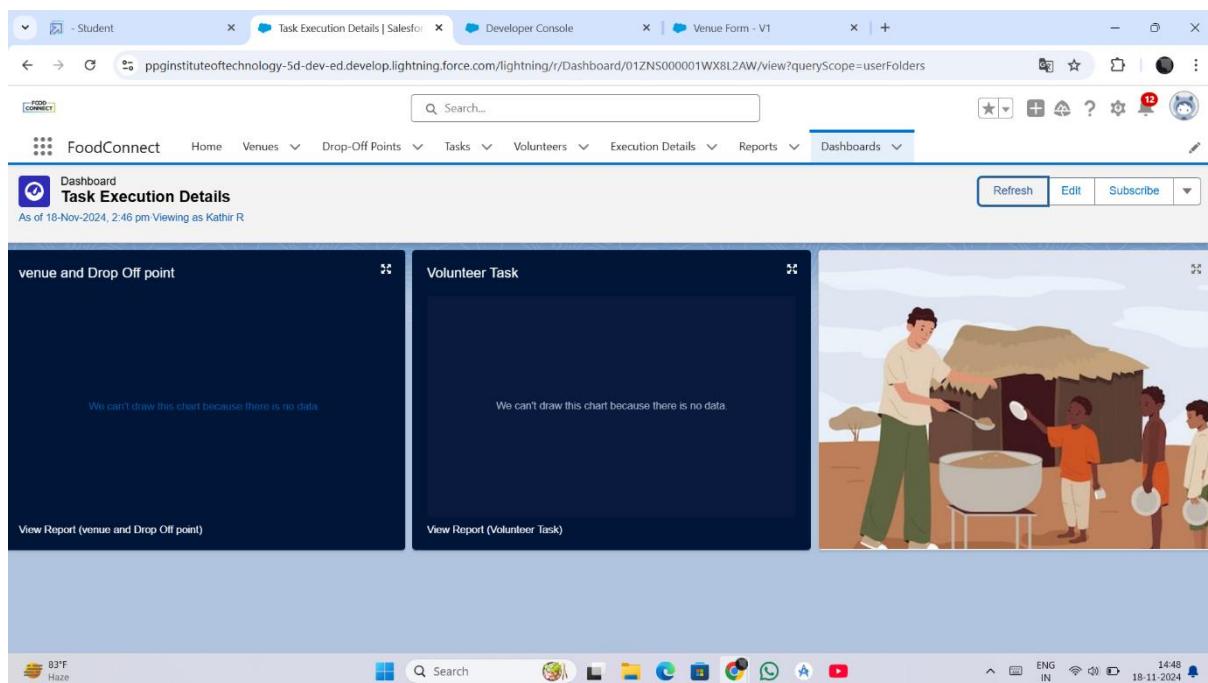
- Click on the **Dashboards** tab.

2. Create a New Folder:

- Click **New Folder**.
- Enter the following details:
- **Folder Label:** Custom Dashboards
- **Folder Unique Name:** (*Auto-populated*)
- Save the folder.

3. Create a New Dashboard:

- Open the newly created **Custom Dashboards** folder.
- Click **New Dashboard**.
- Enter the following details:
 - **Name:** Organization Details
- Save the dashboard.

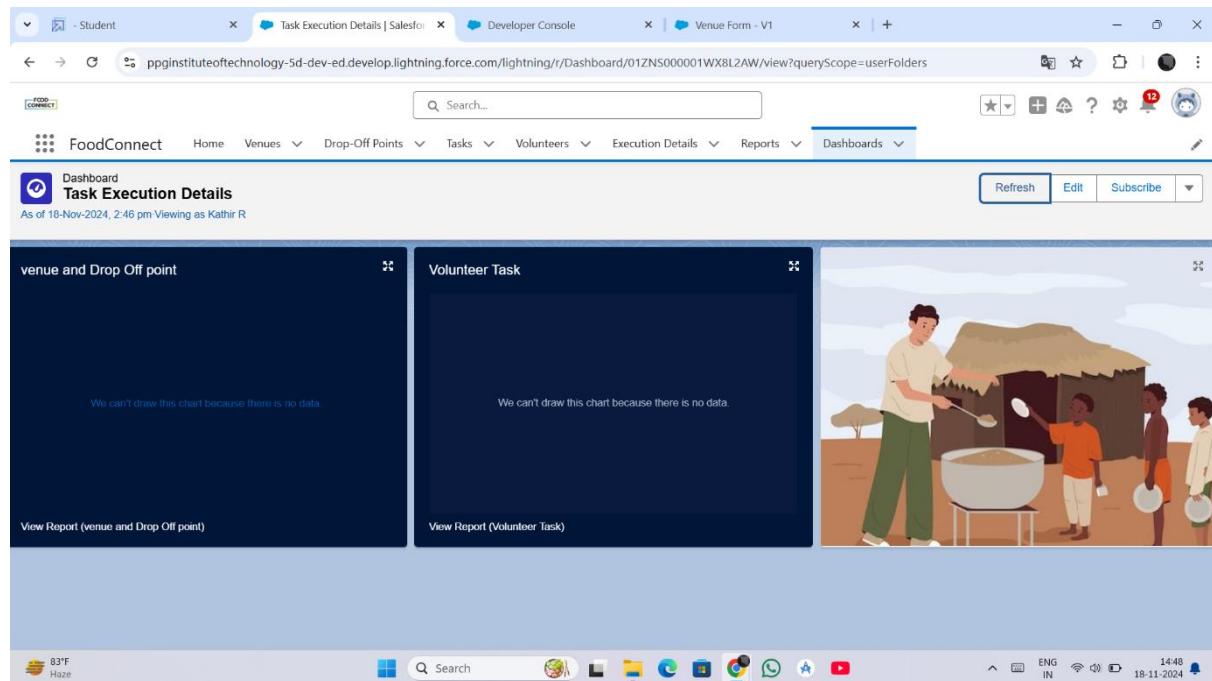


Adding Volunteer Task Report to the Dashboard

To provide an overview of volunteer tasks and their progress, you can add the **Volunteer Task Report** to the Salesforce dashboard.

Adding a Picture to the Dashboard (Optional)

Visual elements such as logos or project-related images can be added to dashboards for a more engaging user experience.



Milestone 14: Sharing Rules

Sharing Rules Configuration for Drop-Off Points.

Sharing rules define the level of data access across users and groups. In the "**FoodConnect**" project, sharing rules ensure that relevant stakeholders have access to important records.

To configure sharing rules for Drop-Off Points based on distance criteria, ensuring that specific data is shared with appropriate public groups in alignment with access requirements.

Rule 1:

- **Label:** Rule 1
- **Rule Name:** Rule_1
- **Type:** Based on Criteria
- **Records to be Shared:**
 - **Field:** Distance
 - **Operator:** Less Than
 - **Value:** 15
- **Users to Share With:**
 - **Public Group:** Iksha
- **Action:** Saved successfully.

Rule 2:

- **Label:** Rule 2
- **Rule Name:** Rule_2
- **Type:** Based on Criteria
- **Records to be Shared:**
 - **Field:** Distance
 - **Operator:** Greater Than
 - **Value:** 15
 - **Field:** Distance
 - **Operator:** Less or Equal
 - **Value:** 30
- **Users to Share With:**
 - **Public Group:** NSS
- **Action:** Saved successfully.

Rule 3:

- **Label:** Rule 3
- **Rule Name:** Rule_3
- **Type:** Based on Criteria
- **Records to be Shared:**
 - **Field:** Distance
 - **Operator:** Greater Than
 - **Value:** 30
 - **Field:** Distance
 - **Operator:** Less or Equal
 - **Value:** 50
- **Users to Share With:**
 - **Public Group:** Street Cause
- **Action:** Saved successfully.

The screenshot shows the Salesforce Sharing Settings page. The left sidebar has a search bar and navigation links for Security, Guest User Sharing Rule Access Report, and Sharing Settings. The main content area is titled "Sharing Settings" and contains several sections for different sharing rules:

- Work Type Group Sharing Rules:** No sharing rules specified.
- Drop-Off Point Sharing Rules:**

Action	Criteria	Shared With	Access Level
Edit Del	(Drop-Off Point: Distance LESS THAN 15)	Group_Iash	Read Only
Edit Del	(Drop-Off Point: Distance GREATER THAN 15) AND (Drop-Off Point: Distance LESS OR EQUAL 30)	Group_NSS	Read Only
Edit Del	(Drop-Off Point: Distance GREATER THAN 30) AND (Drop-Off Point: Distance LESS OR EQUAL 50)	Group_Street.Cause	Read Only
- Task Sharing Rules:** No sharing rules specified.
- Venue Sharing Rules:** No sharing rules specified.
- Volunteer Sharing Rules:** No sharing rules specified.

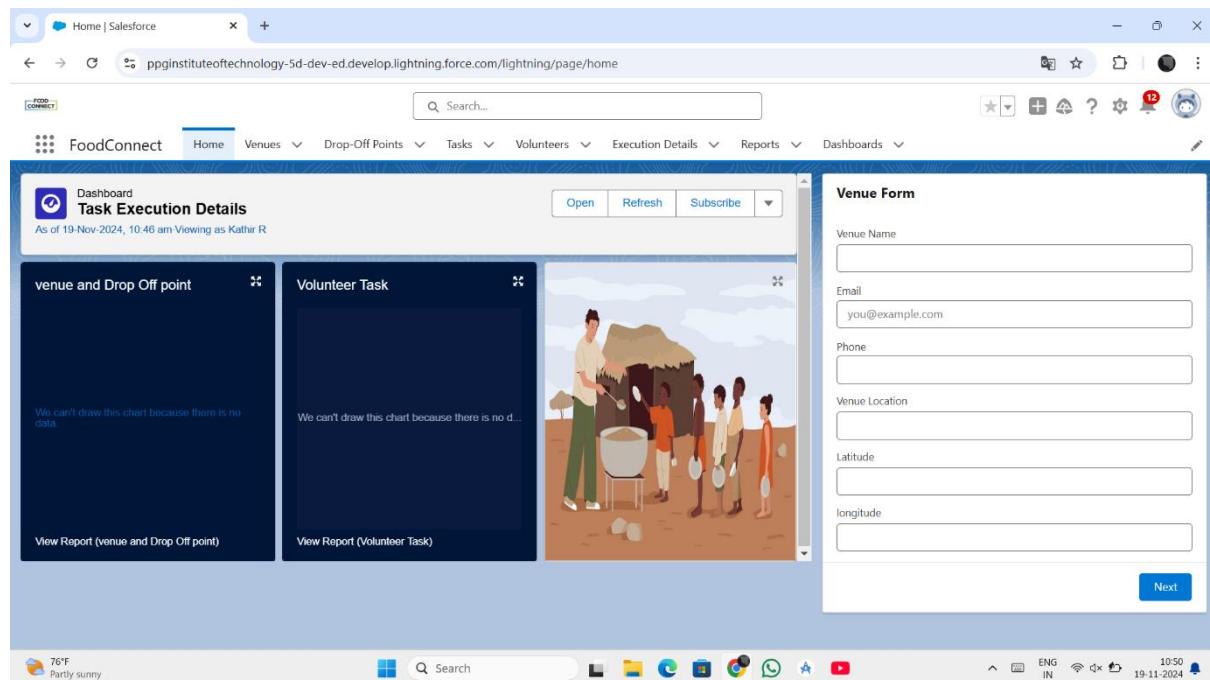
The bottom of the screen shows the Windows taskbar with various icons and system status information.

Milestone 15: Home Page

Creation of Home Page:

Customizing the home page in Salesforce helps to display relevant information for users, ensuring that they can quickly access the data they need.

To create and configure a custom Home Page in the FoodConnect application using Salesforce's Lightning App Builder. The page will include key components such as a Flow and a Dashboard to enhance the user interface and functionality.



Steps:

1. Go to **Setup** and search for **App Builder**.
2. Select **New** to create a new **Home Page**.
3. Choose a **Page Layout**.
4. **Add Components:** Drag and drop components such as:
 - o Reports (e.g., Volunteer Task Report)
 - o Charts

- News (for project updates)
 - Recent Records (e.g., Task Status or Volunteer Assignments)
5. Customize the layout as per the user's role or function (NGO Managers, Volunteers, etc.).

Milestone 16: Conclusion :

By leveraging the Salesforce platform, the project successfully established a streamlined and transparent system for managing surplus food donations. Through efficient coordination with volunteers and timely delivery to beneficiaries, the project effectively addressed food insecurity while maximizing the utilization of available resources.