

To Supply Leftover Food to Poor

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.

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

Done by:

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What you'll learn

1. Real Time Salesforce Project
2. Object & their relationship in Salesforce
3. Profiles & Users
4. Public Groups
5. Report Types
6. Reports & dashboards
7. Flows
8. Triggers
9. Lightning App

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>
2. On the sign up form, enter the following details :

The image contains two side-by-side screenshots of the Salesforce Developer Edition sign-up page. The left screenshot features a dark blue background with a white computer monitor icon displaying a flowchart. Below the monitor, the text reads: "Build enterprise-quality apps fast to bring your ideas to life" followed by a bulleted list of features: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". The right screenshot shows the actual sign-up form with a light blue header containing the Salesforce logo and the text "Sign up for your Salesforce Developer Edition" and "A full-featured copy of the Platform, for free". Below the header, there is a message: "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The form itself has five fields: "First Name*" with input field "Your first name", "Last Name*" with input field "Your last name", "Email*" with input field "Your email address", "Role*" with dropdown menu "Your job role", and "Company*" with input field "Company Name".

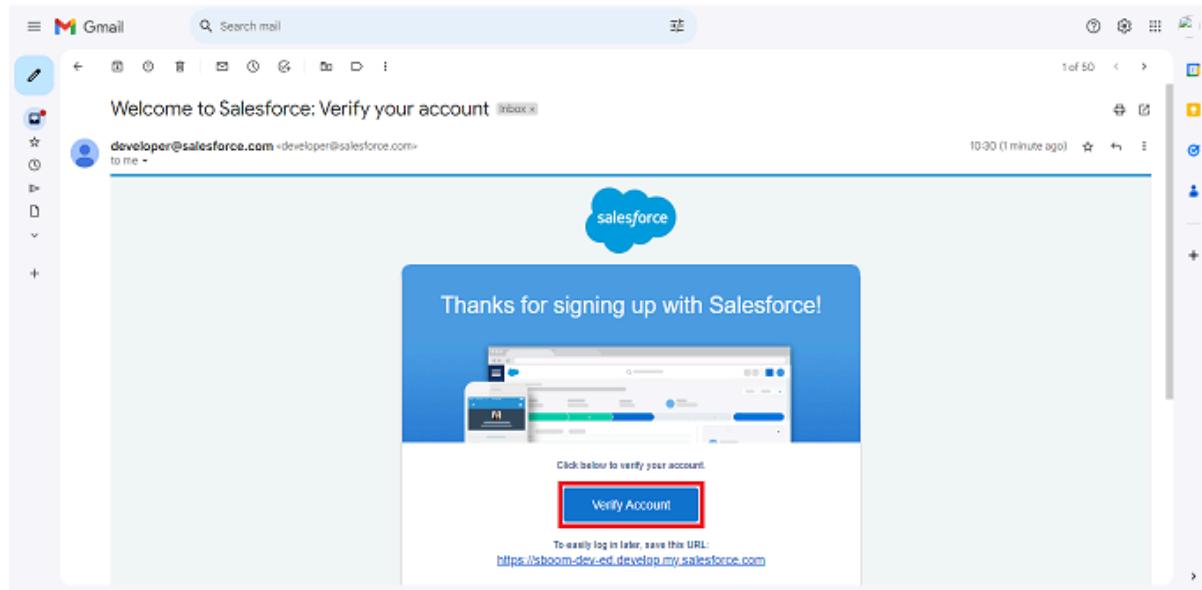
- 1) First name & Last name
- 2) Email
- 3) Role : Developer
- 4) Company : College or Company Name
- 5) County : India
- 6) Postal Code : pin code

7) Username : should be a combination of your name and company
This need not be an actual email id, you can give anything in the format :
username@organization.com

Click on sign me up after filling these.

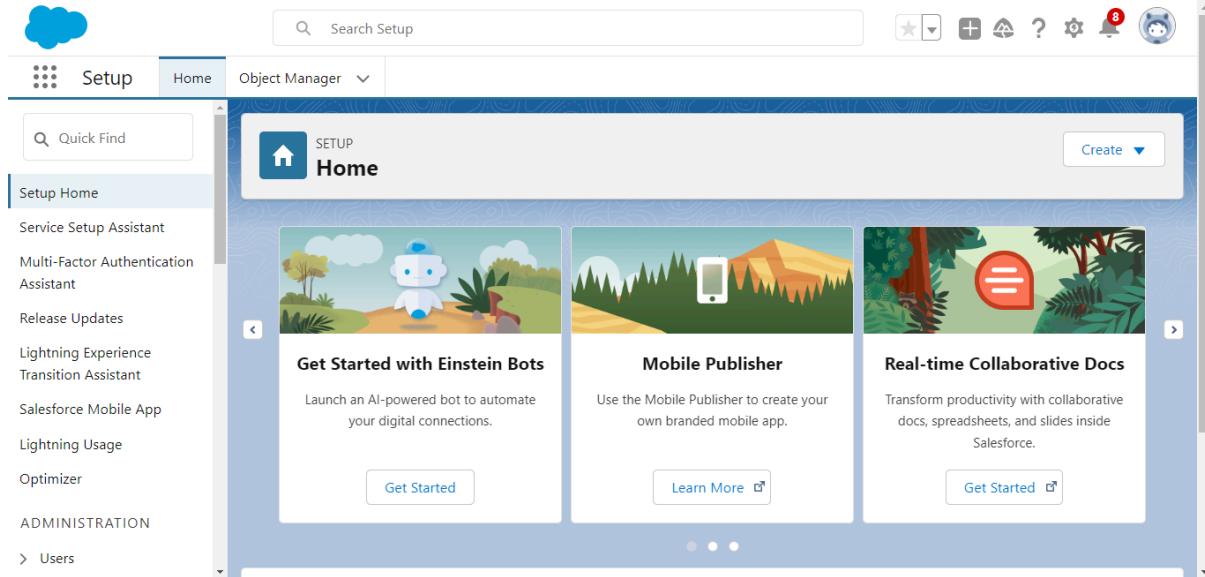
Activity 2: Account Activation:

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.

A screenshot of a "Change Your Password" page. The title is "Change Your Password". It says "Enter a new password for lead@sb.com. Make sure to include at least:" followed by three checked items: "8 characters", "1 letter", and "1 number". There are two input fields: "New Password" and "Confirm New Password", both with red borders. Below them is a "Security Question" field with the question "In what city were you born?" and an "Answer" field containing "asdfghijkl". A large red box surrounds the "New Password", "Confirm New Password", "Security Question", and "Answer" fields. At the bottom is a blue "Change Password" button.

1.

- Click on Verify Account
2. Give a password and answer a security question and click on change password.
 3. Give a password and answer a security question and click on change password.
 4. Then you will redirect to your salesforce setup page.



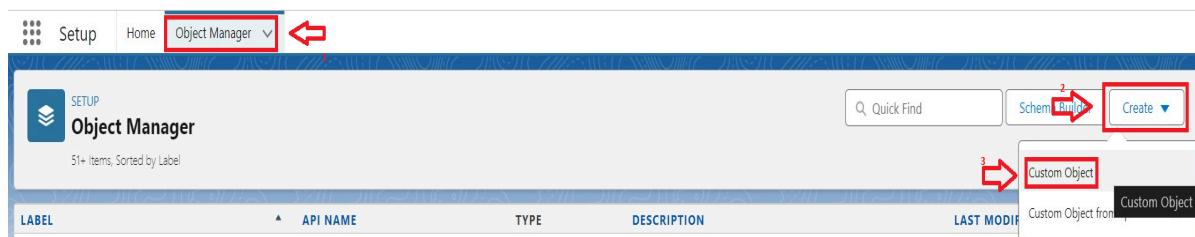
Milestone 2- Object

To Navigate to Setup page:



To create an object:

1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.



2. On Custom object defining page:

3. Enter the label name, plural label name, click on Allow reports, Allow search.

4. Click on Save.

Activity 1: Create Venue Object

To create an object:

- From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
 - Enter the label name→ Venue
 - Plural label name→ Venues
 - Enter Record Name Label and Format
 - Record Name → Venue Name
 - Data Type → Text

2. Click on Allow reports and Track Field History,Allow Activities
3. Allow search → **Save.**

Activity 2: Create Drop-Off Point Object

To create an object:

4. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
 - 4) Enter the label name→ Drop-Off Point
 - 5) Plural label name→ Drop-Off Points
 - 6) Enter Record Name Label and Format
 - Record Name → Drop-Off point Name
 - Data Type → Text
5. Click on Allow reports and Track Field History,Allow Activities
6. Allow search → **Save.**

Activity 3: Create Task Object

To create an object:

7. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
 - 7) Enter the label name→ Task
 - 8) Plural label name→ Tasks
 - 9) Enter Record Name Label and Format
 - Record Name → Task Name
 - Data Type → Text
8. Click on Allow reports and Track Field History,Allow Activities
9. Allow search → **Save.**

Activity 4: Create Volunteer Object

To create an object:

10. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
 - 10) Enter the label name→ Volunteer
 - 11) Plural label name→ Volunteers
 - 12) Enter Record Name Label and Format
 - Record Name → Volunteer Name
 - Data Type → Text
11. Click on Allow reports and Track Field History,Allow Activities
12. Allow search → **Save.**

Activity 5: Create Execution Details Object

To create an object:

13. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
- 13) Enter the label name → Execution Detail
- 14) Plural label name → Execution Details
- 15) Enter Record Name Label and Format
 - Record Name → Execution Detail Name
 - Data Type → Text

14. Click on Allow reports and Track Field History, Allow Activities

15. Allow search → Save.

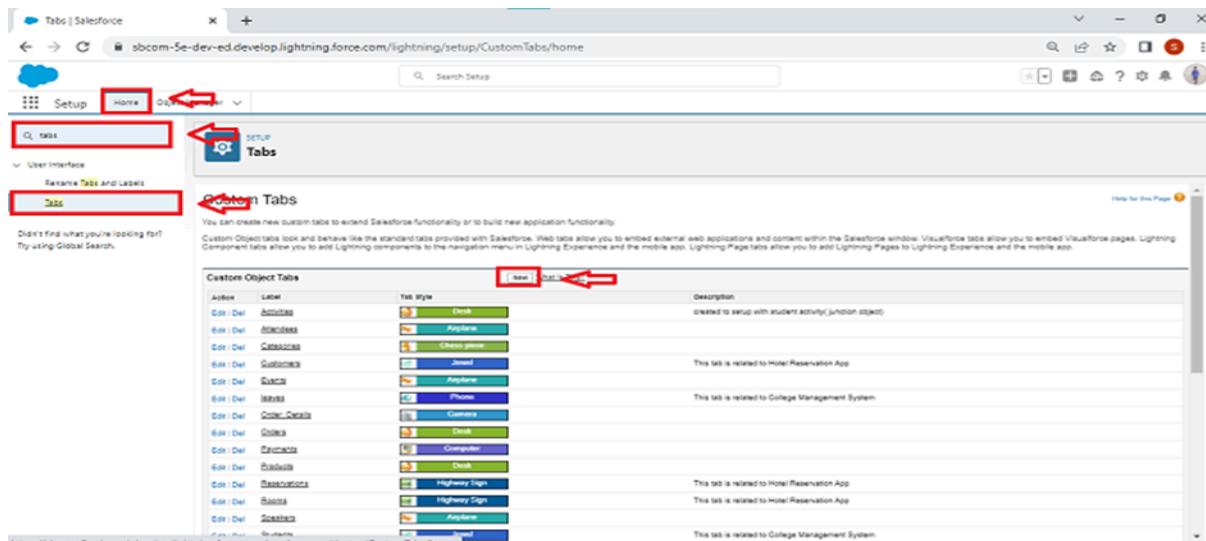
Milestone 3- Tabs

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.

Activity 1: Creating a Custom Tab

To create a Tab:(Venue)

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)



1. Select Object(Venue) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) uncheck the include tab .

2. Make sure that the Append tab to users' existing personal customizations is checked.
3. Click save

Activity 2: Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “Drop-Off Point, Task, Volunteer, Execution Details”.
2. Follow the same steps as mentioned in Activity -1 .

Milestone 4 : The Lightning App

Activity 1: Create a Lightning App

To create a lightning app page:

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

The screenshot shows the Salesforce App Manager interface. At the top, there's a navigation bar with tabs like 'Setup', 'Home', and 'Object Manager'. Below the navigation bar, there's a search bar and a sidebar with links for 'App Manager', 'My Apps', and 'App Marketplace'. The main content area is titled 'Lightning Experience App Manager' and contains a sub-section 'Clone Apps(Beta)'. A prominent red arrow points to a blue rectangular button labeled 'New Lightning App'. To the right of this button, there's another red arrow pointing to a link 'New Connected App'. Below these buttons, there's a note about cloning existing apps and a 'Enable App Cloning' toggle switch. The bottom half of the screen shows a table listing various apps, with columns for 'App Name', 'Developer Name', 'Description', 'Last Modified', 'App Type', and 'VLR'. The table lists items like 'All Tabs', 'Analytics Studio', 'App Launcher', etc.

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

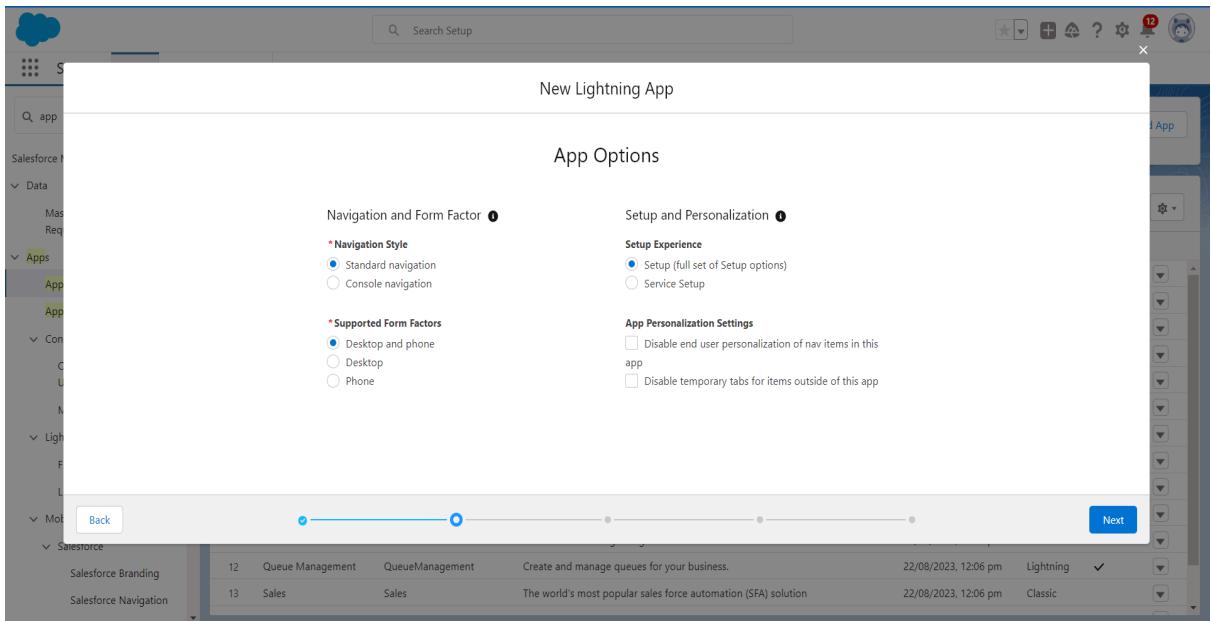
App Name : FoodConnect

Developer Name : This will auto populated

Image : optional (if you want to give any image you can otherwise not mandatory)

Primary color hex value : keep this default.

3. Then click Next → (App option page) Set Navigation Style as Standard Navigation → Next.



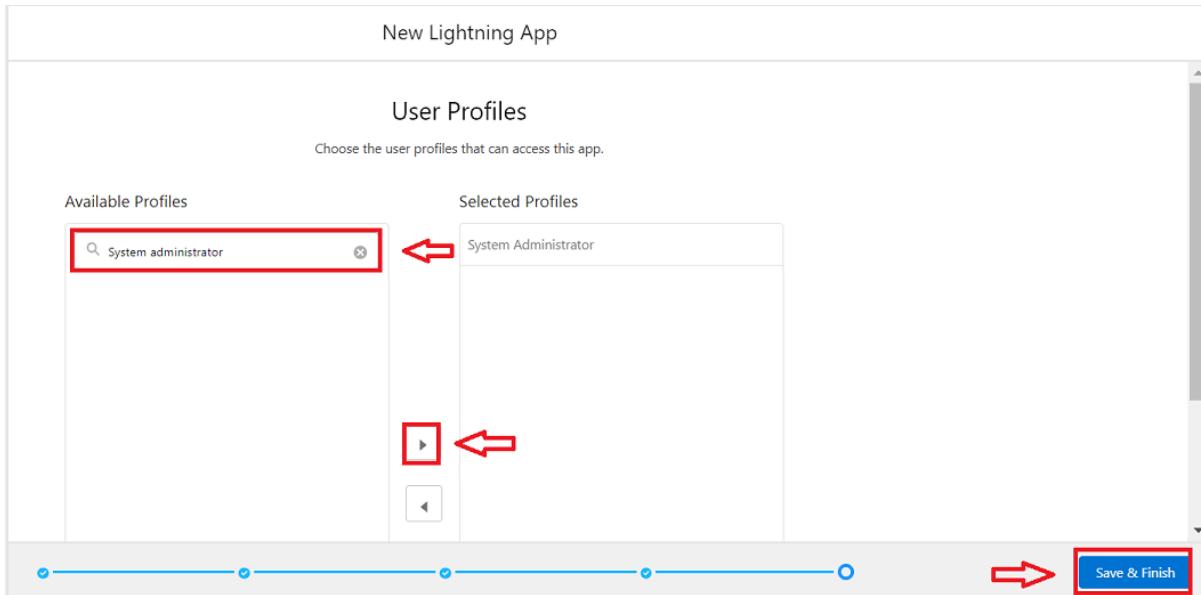
4. (Utility Items) keep it as default → Next.

5. To Add Navigation Items:

Available Items	Selected Items
Accounts	Home
All Sites	Venues
Alternative Payment Methods	Tasks
Analytics	Drop-Off points
App Launcher	Execution Details
Appointment Categories	Volunteers
Appointment Invitations	Reports
Approval Requests	Dashboards
Asset Action Sources	
Asset Actions	

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

6. To Add User Profiles:



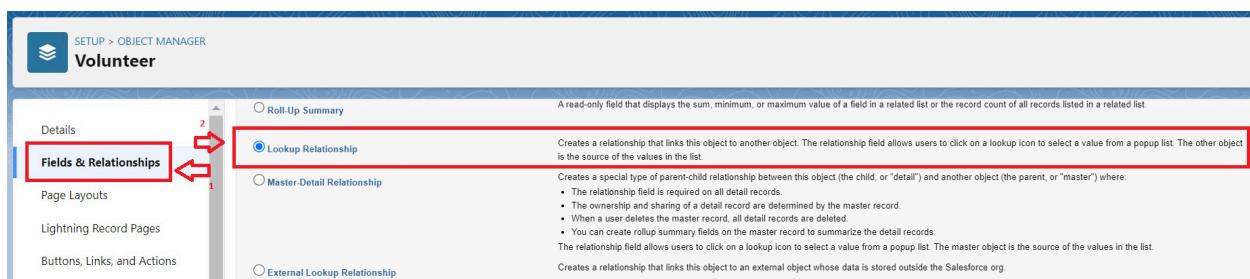
Search profiles (System administrator) in the search bar → click on the arrow button → save & finish.

Milestone 5 : Fields

Activity 1: Creation of Relationship fields in objects

Creation of Lookup Relationship Field on Volunteer Object :

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



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



5. Field Name : Drop_Off_point
6. Field label : Auto generated
7. Next → Next → Save.

Creation of Master Detail Relationship Field on Execution Details Object :

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

Creation of Master Detail Relationship Field on Execution Details Object :

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

Creation of Lookup Relationship Field on Drop-Off Point Object :

22. Go to setup → click on Object Manager → type object name(Task) in the search bar → click on the object.
23. Now click on “Fields & Relationships” → New
24. Select Lookup relationship

25. Select the related object “Venue” and click next.
26. Field Name : Venue
27. Field label : Venue__c
28. Next → Next → Save.

Creation of Lookup Relationship Field on Task Object :

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

Creation of Lookup Relationship Field on Task Object :

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

Activity 2: Creation of fields for the Venue object

1. Go to setup → click on Object Manager → type object name(Venue) in search bar → click on the object.
2. Now click on “Fields & Relationships” → New
3. Select Data type as a “Email” and Click on Next
4. Fill the Above as following:
 - Field Label : Contact Email
 - Field Name : Contact Email
 - Click on required check box
 - Click on Next → Next → Save and new.

To create another fields in an object:

5. Go to setup → click on Object Manager → type object name(Venue) in search bar → click on the object.
6. Now click on “Fields & Relationships” → New
7. Select Data type as a “Phone” and Click on Next
8. Fill the Above as following:
 - Field Label : Contact Phone
 - Field Name : Contact Phone
 - Click on required check box
 - Click on Next → Next → Save and new.

To create another fields in an object:

1. Go to setup → click on Object Manager → type object name(Venue) in search bar → click on the object.
2. Now click on “Fields & Relationships” → New
3. Select Data type as a “Geolocation” and Click on Next
4. Fill the Above as following:
 - Field Label : Location
 - Decimal Places : 4
 - Field Name : Location
 - Description : Enter the Geolocation of your Venue
 - Click on Next → Next → Save and new.

To create another fields in an object:

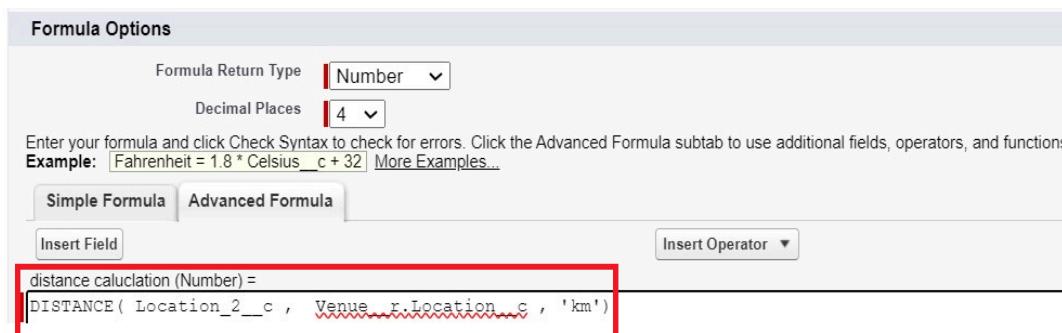
9. Go to setup → click on Object Manager → type object name(Venue) in search bar → click on the object.
10. Now click on “Fields & Relationships” → New
11. Select Data type as a “Long Text Area” and Click on Next
12. Fill the Above as following:
 - Field Label : Venue Location
 - Field Name : Venue_Location
 - Click on Next → Next → Save and new.

Activity 3: Creation of fields for the Drop-Off point object

1. Go to setup → click on Object Manager → type object name(Drop-Off point) in search bar → click on the object.
2. Now click on “Fields & Relationships” → New
3. Select Data type as a “Geolocation” and Click on Next
4. Fill the Above as following:
 - Field Label : Location 2
 - Field Name : gets auto generated
 - Description : Enter the Geolocation of the Drop off Point
 - Geolocation Options : select Decimal
 - Decimal Places : 4
 - Click on Next → Next → Save and new.

To create another fields in an object:

13. Go to setup → click on Object Manager → type object name(Drop-Off point) in search bar → click on the object.
14. Now click on “Fields & Relationships” → New
15. Select Data type as a “Formula” and Click on Next
16. Fill the Above as following:
 - Field Label : distance calculation
 - Field Name : distance_calculation
 - Formula Return Type : Number
 - Formula Options : DISTANCE(Location_2__c , Venue__r.Location__c , 'km')
 - Click on Next → Next → Save and new.



To create another fields in an object:

17. Go to setup → click on Object Manager → type object name(Drop-Off point) in search bar → click on the object.
18. Now click on “Fields & Relationships” → New

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

20. Fill the Above as following:

- Field Label : State
- Field Name : State
- Enter values, with each value separated by a new line :
Andhra Pradesh
Arunachal Pradesh
Assam
Bihar
Chhattisgarh
Goa
Gujarat
Haryana
Himachal Pradesh
Jharkhand
Karnataka
Kerala
Maharashtra
Madhya Pradesh
Manipur
Meghalaya
Mizoram
Nagaland
Odisha
Punjab
Rajasthan
Sikkim
Tamil Nadu
Tripura
Telangana
Uttar Pradesh
Uttarakhand
West Bengal
Andaman & Nicobar (UT)
Chandigarh (UT)
Dadra & Nagar Haveli and Daman & Diu (UT)
Delhi [National Capital Territory (NCT)]
Jammu & Kashmir (UT)
Ladakh (UT)
Lakshadweep (UT)
Puducherry (UT)

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

To create another fields in an object:

21. Go to setup → click on Object Manager → type object name(Task) in search bar → click on the object.
22. Now click on “Fields & Relationships” → New
23. Select Data type as a “Number” and Click on Next
24. Fill the Above as following:
 - Field Label : Distance
 - Field Name : Distance
 - Length : 14
 - Decimal Places : 4
 - Click on required check box
 - Click on Next → Next → Save and new.

Activity 4: Creation of fields for the Task object

1. Go to setup → click on Object Manager → type object name(Task) in search bar → click on the object.
2. Now click on “Fields & Relationships” → New
3. Select Data type as a “Auto Number” and Click on Next
4. Fill the Above as following:
 - Field Label : Task ID
 - Display Format : TASK-{0}
 - Starting Number : 1
 - Field Name : gets auto generated
 - Click on required check box
 - Click on Next → Next → Save and new.

To create another fields in an object:

25. Go to setup → click on Object Manager → type object name(Task) in search bar → click on the object.
26. Now click on “Fields & Relationships” → New
27. Select Data type as a “Date” and Click on Next
28. Fill the Above as following:
 - Field Label : Date
 - Field Name : Date
 - Click on required check box

- Click on Next → Next → Save and new.

To create another fields in an object:

29. Go to setup → click on Object Manager → type object name(Task) in search bar → click on the object.
30. Now click on “Fields & Relationships” → New
31. Select Data type as a “Picklist (Multi-Select)” and Click on Next
32. Fill the Above as following:
 - Field Label : Food Category
 - Field Name : Food Category
 - Enter values, with each value separated by a new line :

Veg
Non-Veg
Salad
Snack
 - Click on required check box
 - Click on Next → Next → Save and new.

To create another fields in an object:

33. Go to setup → click on Object Manager → type object name(Task) in search bar → click on the object.
34. Now click on “Fields & Relationships” → New
35. Select Data type as a “Number” and Click on Next
36. Fill the Above as following:
 - Field Label : Number of People Served
 - Field Name : Number_of_People_Served
 - Click on required check box
 - Click on Next → Next → Save and new.

To create another fields in an object:

37. Go to setup → click on Object Manager → type object name(Task) in search bar → click on the object.
38. Now click on “Fields & Relationships” → New
39. Select Data type as a “Text” and Click on Next
40. Fill the Above as following:
 - Field Label : Name of the Person
 - Length : 255
 - Field Name : Name_of_the_Person
 - Click on Next → Next → Save and new.

To create another fields in an object:

41. Go to setup → click on Object Manager → type object name(Task) in search bar → click on the object.
42. Now click on “Fields & Relationships” → New
43. Select Data type as a “Phone” and Click on Next
44. Fill the Above as following:
 - Field Label : Phone
 - Field Name : Phone
 - Click on Next → Next → Save and new.

To create another fields in an object:

45. Go to setup → click on Object Manager → type object name(Task) in search bar → click on the object.
46. Now click on “Fields & Relationships” → New
47. Select Data type as a “Pick List” and Click on Next
48. Fill the Above as following:
 - Field Label : Rating
 - Field Name : Rating
 - Enter values, with each value separated by a new line :
 - 1
 - 2
 - 3
 - 4
 - 5
 - Click on Next → Next → Save and new.

To create another fields in an object:

49. Go to setup → click on Object Manager → type object name(Task) in search bar → click on the object.
50. Now click on “Fields & Relationships” → New
51. Select Data type as a “Long Text Area” and Click on Next
52. Fill the Above as following:
 - Field Label : Feedback
 - Field Name : Feedback
 - Click on Next → Next → Save and new.

Activity 5: Creation of fields for the Volunteer object

1. Go to setup → click on Object Manager → type object name(Volunteer) in search bar → click on the object.
2. Now click on “Fields & Relationships” → New
3. Select Data type as a “Auto Number” and Click on Next
4. Fill the Above as following:
 - Field Label : Volunteer ID
 - Field Name : gets auto generated
 - Starting number : 1
 - Click on required check box
 - Click on Next → Next → Save and new.
 - Click on Next → Next → Save and new.

To create another fields in an object:

53. Go to setup → click on Object Manager → type object name(Volunteer) in search bar → click on the object.
54. Now click on “Fields & Relationships” → New
55. Select Data type as a “Picklist” and Click on Next
56. Fill the Above as following:
 - Field Label : Gender
 - Field Name : Gender
 - Enter values, with each value separated by a new line :
Female
Male
 - Click on Next → Next → Save and new.

To create another fields in an object:

57. Go to setup → click on Object Manager → type object name(Volunteer) in search bar → click on the object.
58. Now click on “Fields & Relationships” → New
59. Select Data type as a “Date” and Click on Next
60. Fill the Above as following:
 - Field Label : Available On
 - Field Name : Available On
 - Click on required check box
 - Click on Next → Next → Save and new.

To create another fields in an object:

61. Go to setup → click on Object Manager → type object name(Volunteer) in search bar → click on the object.
62. Now click on “Fields & Relationships” → New
63. Select Data type as a “Number” and Click on Next
64. Fill the Above as following:
 - Field Label : Age
 - Field Name : Age
 - Click on required check box
 - Click on Next → Next → Save and new.

To create another fields in an object:

65. Go to setup → click on Object Manager → type object name(Volunteer) in search bar → click on the object.
66. Now click on “Fields & Relationships” → New
67. Select Data type as a “Email” and Click on Next
68. Fill the Above as following:
 - Field Label : Email
 - Field Name : Email
 - Click on required check box
 - Click on Next → Next → Save and new.

To create another fields in an object:

69. Go to setup → click on Object Manager → type object name(Volunteer) in search bar → click on the object.
70. Now click on “Fields & Relationships” → New
71. Select Data type as a “Number” and Click on Next
72. Fill the Above as following:
 - Field Label : Contact Number
 - Field Name : Contact_Number
 - Click on required check box
 - Click on Next → Next → Save and new.

To create another fields in an object:

73. Go to setup → click on Object Manager → type object name(Volunteer) in search bar → click on the object.
74. Now click on “Fields & Relationships” → New
75. Select Data type as a “Text Area (Long)” and Click on Next
76. Fill the Above as following:
 - Field Label : Address

- Field Name : Address
- Click on Next → Next → Save and new.

To create another fields in an object:

77. Go to setup → click on Object Manager → type object name(Volunteer) in search bar → click on the object.
78. Now click on “Fields & Relationships” → New
79. Select Data type as a “Date” and Click on Next
80. Fill the Above as following:
 - Field Label : Date of Birth
 - Field Name : Date_of_Birth
 - Click on Next → Next → Save and new.

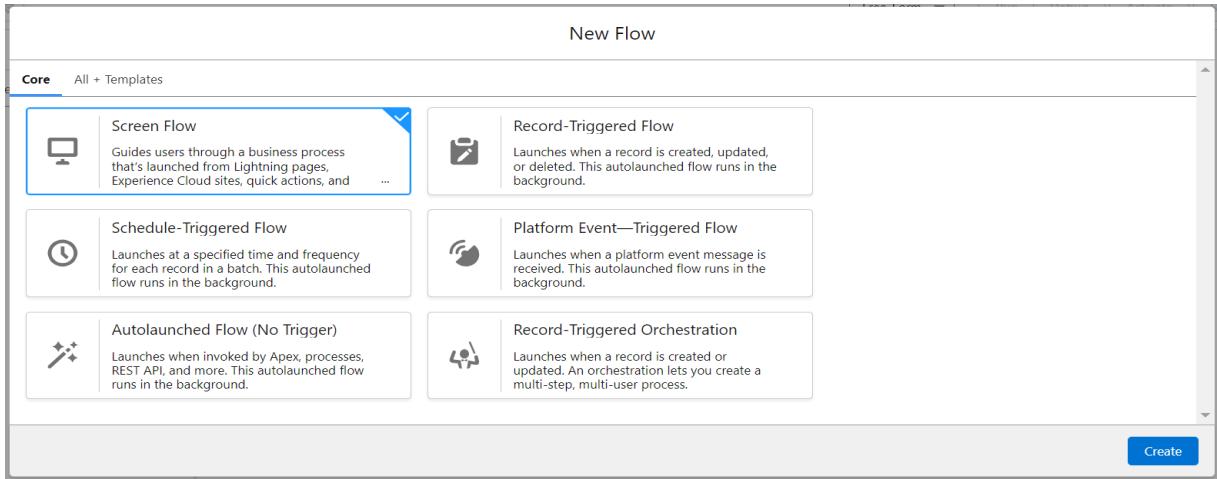
Activity 6: Creation of fields for the Execution Details object

- 1.Go to setup → click on Object Manager → type object name(Volunteer) in search bar → click on the object.
2. Now click on “Fields & Relationships” → New
3. Select Data type as a “Auto Number” and Click on Next
4. Fill the Above as following:
 - Field Label : Execution ID
 - Field Name : gets auto generated
 - Starting Number : 1
 - Click on required check box
 - Click on Next → Next → Save and new.

Milestone 6 : FLOWS

Activity 1 : Create Flow to create a record in Venue object:

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



3. Click on the '+' icon in between start and end, and click on screen element.

4. Under the Screen Properties:

Label : Venue Details

API Name : Venue_Details

5. Now lets add components in this flow. Click on Text Component and name it as:

Label : Venue Name

API Name : Venue_Name

6. Click on Email Component and name it as:

Label : Email

API Name : Contact_Email

7. Click on Phone Component and name it as:

Label : Phone

API Name : Contact_Phone

8. Click on Text Component and name it as:

Label : Venue Location

API Name : Venue_Location

9. Click on Number Component and name it as:

Label : Latitude

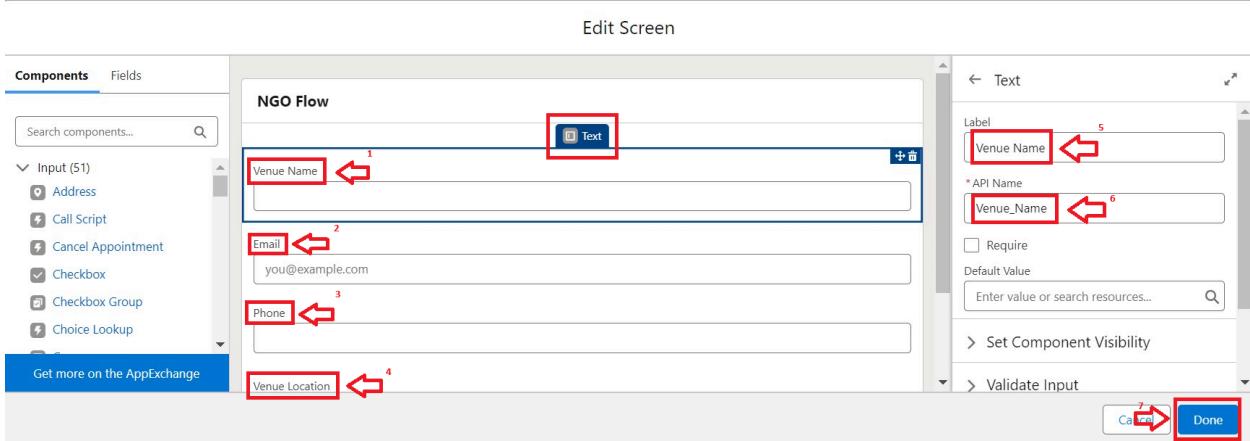
API Name : Latitude

10. Click on Number Component and name it as:

Label : longitude

API Name : longitude

11. Next click on Done. This would like below



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

13. Now label it as

Label : Create Venue Record

API Name : Create_Venue_Record

How Many Records to Create : One

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

Object : Venue

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

Field : Value = Contact_Email_c : {!Contact_Email.value} : value

Field : Value = Contact_Phone_c : {!Contact_Phone.value} : value

Field : Value = Name : {!Venue_Name}

Field : Value = Venue_Location_c : {!location}

Field : Value = Location_Latitude_s : {!latitude}

Field : Value = Location_Longitude_s : {!longitude}

14. This would look like:

Create a Record of This Object

* Object
Venue

Set Field Values for the Venue

Field Contact_Email_c	Value Aa Contact_Email > Value X
Field Contact_Phone_c	Value Aa Contact_Phone > Value X
Field Name	Value Aa Venue_Name X
Field Venue_Location_c	Value Aa location X

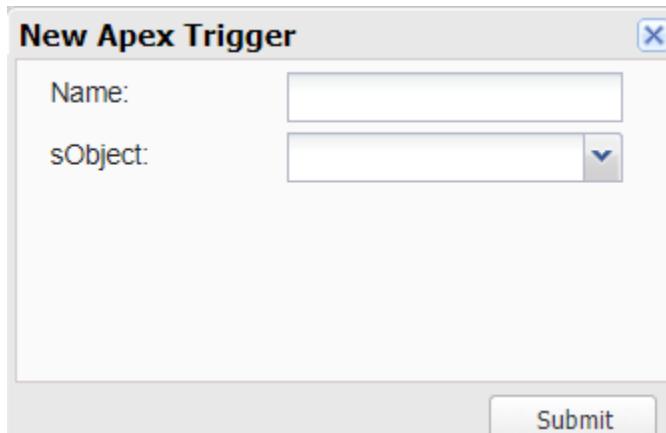
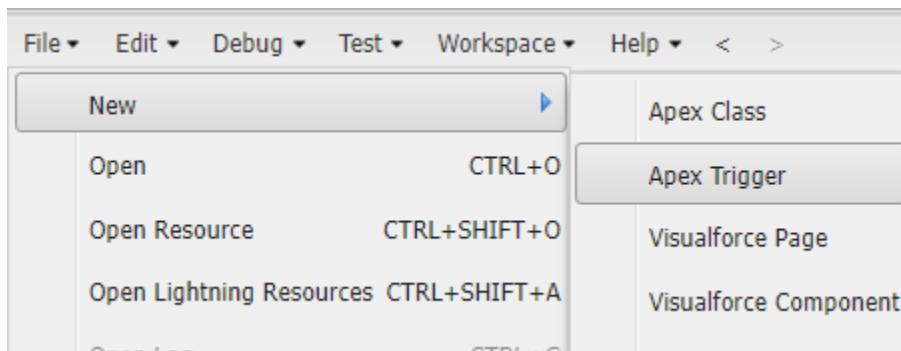
15. Click on Save as:

Flow Label : Venue Form
Flow API Name : Venue_Form

Milestone 7 : Trigger

Activity 1 : Create a Trigger.

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



- 5) Enter Name : DropOffTrigger
sObject: Drop-Off Point
- 6) Click on Submit.

Activity 2 : Trigger Code.

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

Code:

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

Milestone 8 : Profiles

1. Go to setup page → type Profiles in Quick Find bar → click on Profiles→ click on ‘S’
2. Click on Clone beside Standard Platform User.
3. Under Clone Profile:
Profile Name : NGOs Profile
4. Then click on Save

Milestone 9 : Creation of Users (In our Project we consider them as NGO's).

Activity 1 : Creation of User1.

1. Go to setup page → type users in Quick Find bar → click on users→ New user.
2. In General Information give details as: (Note : create users as per your wish NGO's)
First Name : Iksha Foundation
Last Name : Iksha_Foundation
Alias : iiksh
Email : Give Your Email
Username : ikshafoundation@sb.com (give the username different)
Nickname : Auto Populated
User License : Salesforce Platform
Profile : NGOs Profile
Active : Check

General Information

First Name	Iksha Foundation	Role	<None Specified>
Last Name	Iksha_Foundation	User License	Salesforce Platform
Alias	iiksh	Profile	NGOs Profile
Email	bhargavipaila1023@gmail.co	Active	<input checked="" type="checkbox"/>
Username	ikshafoundation@sb.com	Marketing User	<input type="checkbox"/>
Nickname	User1711437164226559933	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>

3. Click on Save

Activity 2 : Creation of User2, User3

1. Create another Two Users by following steps in Activity - 1 with similar User License and Profile.
2. Give Different First Name, Last Name based on Different NGO's.

<input type="checkbox"/> Edit Login <u>Iksha_Foundation</u> , <u>Iksha Foundation</u>	iiksh	<u>ikshafoundation@sb.com</u>	<input checked="" type="checkbox"/> NGOs Profile
<input type="checkbox"/> Edit Login <u>NSS</u> , <u>NSS</u>	nss	<u>nss@sb.com</u>	<input checked="" type="checkbox"/> NGOs Profile
<input type="checkbox"/> Edit Login <u>Street_Cause</u> , <u>Street Cause</u>	sstre	<u>streetcause@sb.com</u>	<input checked="" type="checkbox"/> NGOs Profile

Milestone 10 : Public Groups

Activity 1 : Creation of Public Group 1.

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

Activity 2 : Creation of Public Group 2.

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

New				
Action	Label ↑	Group Name	Created By	Created Date
Edit Del	Iksha	Iksha	Bhargavi, Paila	26/03/2024, 2:27 pm
Edit Del	NSS	NSS	Bhargavi, Paila	26/03/2024, 2:27 pm
Edit Del	Street Cause	Street_Cause	Bhargavi, Paila	26/03/2024, 2:26 pm

Milestone 11 : Report Types

Activity 1 : Creation of Report Types

1. Go to setup page → type Report Types in Quick Find bar → click on Report Types → click on Continue → Click on New Custom Report Type.
2. In Define the Custom Report Type:
Primary Object : Select Venues
Report Type Label : Venue with DropOff with Volunteer
Report Type Name : Venue_with_DropOff_with_Volunteer
Description : Venue with DropOff with Volunteer
Store in Category : Select Other Reports
Deployment Status : Deployed
3. Click on Next
4. Near Click to relate another Object Select Drop-Off Points.
5. And also select "A" records may or may not have related "B" records.
6. Now again Near Click to relate another Object Select Volunteers.
7. Now click on Save.

Milestone 12 : Reports

Activity 1 : Creation of Report on Venue with DropOff with Volunteer

1. Go to the app(FoodConnect) → click on the reports tab
2. Click on New Folder.
Folder Label : Custom Reports
Folder Unique Name : CustomReports
3. Open Custom Reports and click on New Report
4. Select Report Type : Venue with DropOff with Volunteer
5. Then click on Start Report.
6. In GROUP ROWS : Add Volunteer Name

7. In Columns : Add Venue Name, Drop-Off point Name, Distance.

The screenshot shows the Oracle Reports builder interface. On the left, there's a sidebar with sections for 'Outline' (selected), 'Groups', 'Columns', and 'Filters'. Under 'Outline', 'Volunteer Name' is listed under 'Groups' and 'Venue Name' is listed under 'Columns'. The main area displays a preview of a report with the following data:

	Volunteer Name ↑	Venue Name ↑	Drop-Off point Name ↓	Distance ↓
- (4)		La Royale Banquet Hall.	Shapur	5.1161
		La Royale Banquet Hall.	Jeedimetla	6,902.9995
		Paradise Garden Function Hall	Suraram Village	28.2332
		Ujwala Grand	-	-
Subtotal				6,936.3488
Total (4)				6,936.3488

8. Now click on Save & Run.

9. Give Label as :

Report Name : venue and Drop Off point

Report Unique Name : Auto Populated

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

Activity 2 : Creation of Report on Volunteers with Execution Details and Tasks

11. Go to the app(FoodConnect) → click on the reports tab
12. Click on Custom Reports Folder and click on New Report
13. Select Report Type : Volunteers with Execution Details and Tasks.
14. Then click on Start Report.
15. In GROUP ROWS : Volunteer ID
16. In Columns : Add Volunteer : Volunteer Name, Task : Task Name, Execution Detail : Execution Detail Name, Volunteer: Owner Name, Task: Date, Task : Rating.

REPORT ▾

Volunteer Task ➔ Volunteers with Execution Details and Tasks

Fields > Outline Filters

GROUP ROWS Add group...

Volunteer ID X

GROUP COLUMNS Add group...

Columns Add column...

Volunteer: Volunteer Name X

Task: Task Name X

Execution Detail: Execution Detail X

Volunteer: Owner Name X

Task: Date X

Task: Rating X

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

Update Preview Automatically

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

Row Counts Detail Rows Subtotals Grand Total

17. Now click on Save & Run.

18. Give Label as :

Report Name : Volunteer Task

Report Unique Name : Auto Populated

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

Milestone 13 : Dashboards

Activity 1 : Adding venue and Drop Off point Report to the Dashboard

1. Go to the app(FoodConnect) → click on the Dashboards tab.

2. Click on New Folder.

Folder Label : Custom Dashboards

Folder Unique Name : Auto Populated

3. Open Custom Dashboards and click on New Dashboards

4. Name : Organization Details

5. Click on Widget and select Chart or Table

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

7. Then click on select

8. In Add Component:

Display As : Select Lightning Table

Component Theme : Select Dark (Optional)

The screenshot shows the configuration interface for a report titled "venue and Drop Off point". The left panel includes fields for "Report" (set to "venue and Drop Off point"), "Display As" (with various chart and table icons), "Groups" (with an "Add group..." button), and "Columns" (with a delete icon). The right panel shows a "Preview" of the report, which displays a table with four rows:

Venue Name ↑	Drop-Off point Name	Distance
La Royale Banquet Hall.	Shapur	5.1161
La Royale Banquet Hall.	Jeedimetla	6.9030K
Paradise Garden Function Hall	Suraram Village	28.2332
Ujwala Grand	-	-

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

9. Now click on save.

Activity 2 : Adding Volunteer Task Report to the Dashboard

10. Click on Widget and select Chart or Table
11. In Select Report : Select Volunteer Task Report.
12. Then click on select
13. In Add Component:

Display As : Select Line Chart

Component Theme : Select Dark (Optional)

The screenshot shows the configuration interface for a report titled "Volunteer Task". The left panel includes fields for "Report" (set to "Volunteer Task"), "Display As" (with various chart and table icons), "X-Axis" (set to "Volunteer ID"), and "Y-Axis" (set to "Record Count"). The right panel shows a "Preview" of the report, which displays a line chart with two data points at (4, 1) and (2, 1).

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

14. Now click on save.

Activity 3 : Adding a Picture to the Dashboard (Optional)

(Note : To upload an image into the Dashboard, we have to first download an image from google or other sources into your system)

15. Click on Widget and select Image. Then click on Browse Files.

16. Then Select the Picture you want to upload in this Dashboard.

17. Then click on Save As :

Name : Task Execution Details

Click on Select Folder and select Custom Dashboards

18. Click on Select Folder and then Save.



Milestone 14 : Sharing Rules

Activity 1 : Creation of sharing rules

1. Go to setup → type Sharing Settings in quick find box → Click on the Sharing Settings.
2. Scroll down and find Drop-Off point Sharing Rules.
3. Click on new near Drop-Off point Sharing Rules and Name it as:
Label : Rule 1
Rule Name : Rule_1
4. Select your rule type : Select Based on criteria.
5. Select which records to be shared:
Field : Operator : Value = Distance : less than : 15
6. Select the users to share with : Near Share With
Public Groups : Iksha
7. Click on Save.

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

Label : Rule 2

Rule Name : Rule_2

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

10. Select which records to be shared:

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

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

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

Public Groups : NSS

12. Click on Save.

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

Label : Rule 3

Rule Name : Rule_3

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

15. Select which records to be shared:

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

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

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

Public Groups : Street Cause

17. Click on Save.

Drop-Off point Sharing Rules		New	Recalculate	Drop-Off point Sharing Rules Help ?	
Action	Criteria			Shared With	Access Level
Edit Del	(Drop-Off point: Distance LESS OR EQUAL 15)			Group: Iksha	ReadWrite
Edit Del	(Drop-Off point: Distance GREATER THAN 15) AND (Drop-Off point: Distance LESS OR EQUAL 30)			Group: NSS	ReadWrite
Edit Del	(Drop-Off point: Distance GREATER THAN 30) AND (Drop-Off point: Distance LESS OR EQUAL 50)			Group: Street Cause	ReadWrite

Milestone 15 : Home Page

Activity 1 : 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.

The screenshot shows a Salesforce canvas page. At the top, there's a header with a dashboard icon, the title "Task Execution Details", and a timestamp "As of 29-Mar-2024, 9:55 am Viewing as Paila Bhargavi". To the right are buttons for "Open", "Refresh", "Subscribe", and a dropdown menu. Below the header are two report components: "venue and Drop Off point" and "Volunteer Task". The "venue and Drop Off point" report displays a table of locations with their names, drop-off points, and distances. The "Volunteer Task" report shows a bar chart of task counts by volunteer ID. To the right of these reports is a placeholder component titled "Flow Component: Venue Form" with the note "This is a placeholder. Flows don't run in the canvas." Below the reports are two empty slots with "Add Component(s) Here" buttons.

7. Click on Save and Activation, then click on App Default, then Add Assignments.
8. Add FoodConnect App and then Save.
9. FoodConnect Home Page would Look Like this.

The screenshot shows the FoodConnect home page. At the top, there's a navigation bar with icons for search, filters, and user profile, followed by the "FoodConnect" logo and a dropdown menu. Below the navigation is a header with a dashboard icon, the title "Task Execution Details", and a timestamp "As of 29-Mar-2024, 9:55 am Viewing as Paila Bhargavi". To the right are buttons for "Open", "Refresh", "Subscribe", and a dropdown menu. The main content area contains the "venue and Drop Off point" report (a table of locations), the "Volunteer Task" report (a bar chart), and a "Venue Form" component. The "Venue Form" component includes fields for "Venue Name" (with a placeholder value), "Email" (with a placeholder value), "Phone" (empty), and "Venue Location" (empty). A "Next" button is at the bottom right of the form.

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.

