

# 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

## 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 :

**Build enterprise-quality apps fast to bring your ideas to life**

- 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
- Customize UI with clicks or any leading-edge web framework

**Sign up for your Salesforce Developer Edition**  
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name\*  Last Name\*

Email\*

Role\*

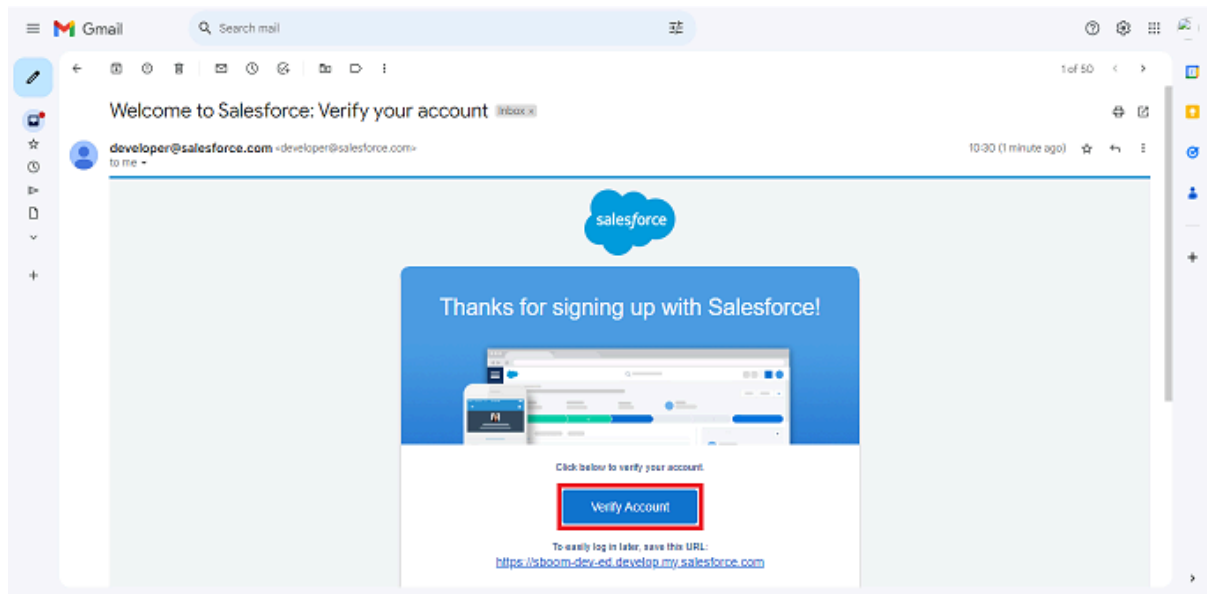
Company\*

- 1) First name & Last name
- 2) Email
- 3) Role : Developer
- 4) Company : College or Company Name
- 5) Country : 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](mailto:username@organization.com)  
Click on sign me up after filling these.

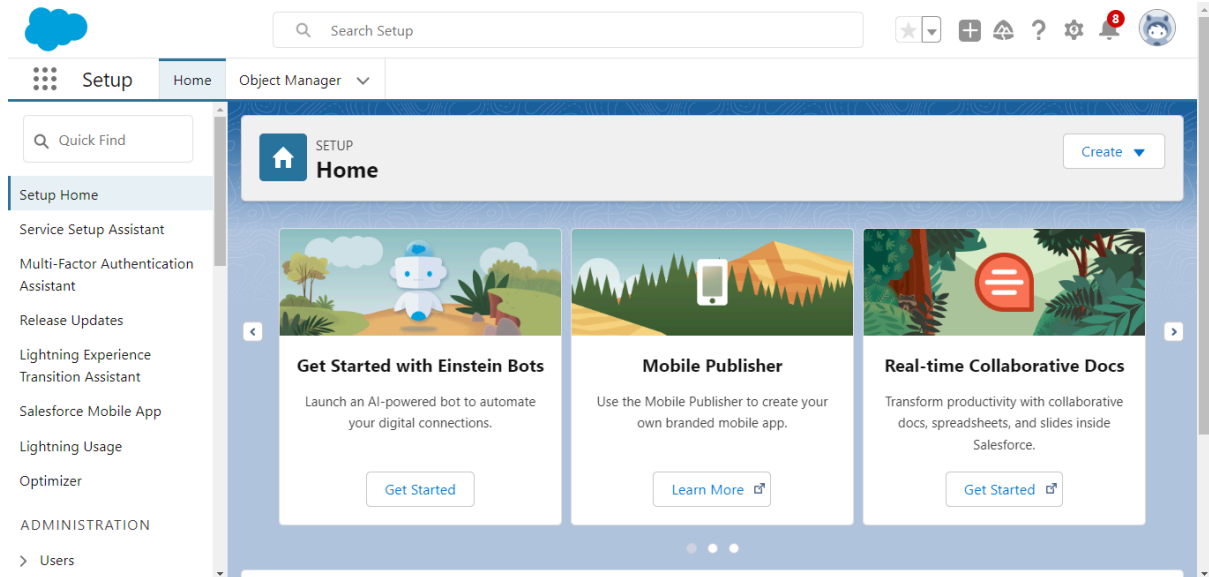
## Activity 2: Account Activation:

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 the 'Change Your Password' form in Salesforce. The form is titled 'Change Your Password' and asks to 'Enter a new password for lead@sb.com'. It lists requirements: 8 characters, 1 letter, and 1 number. There are three green checkmarks indicating these requirements are met. The form has four main sections: 'New Password' with a text input field and a 'Good' status indicator; 'Confirm New Password' with a text input field and a 'Match' status indicator; 'Security Question' with a dropdown menu showing 'In what city were you born?'; and 'Answer' with a text input field containing 'asdfghjkl'. The 'New Password', 'Confirm New Password', 'Security Question', and 'Answer' sections are grouped together and highlighted with a red rectangle. At the bottom is a blue 'Change Password' button.

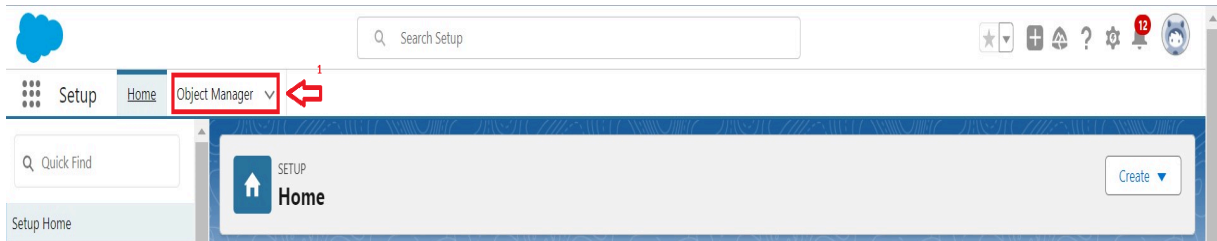
1.

- 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.



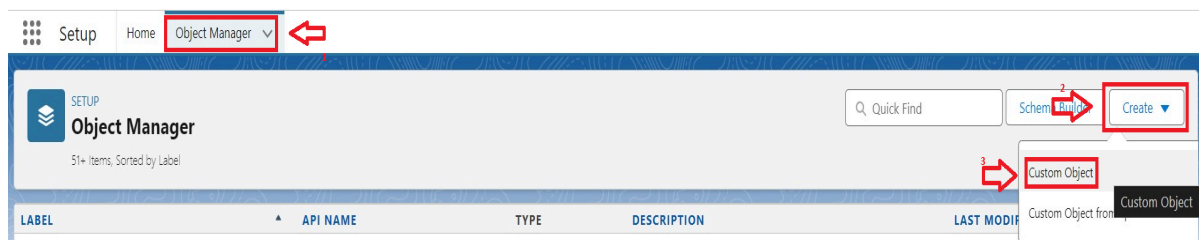
## Milestone 2- Object

### 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.

The screenshot shows the 'New Custom Object' setup page in Salesforce. Red boxes and arrows highlight specific fields and options:

- Custom Object Information:**
  - Label:** A text input field with a red box and arrow pointing to it.
  - Plural Label:** A text input field with a red box and arrow pointing to it.
  - Object Name:** A text input field with a red box and arrow pointing to it.
  - Example:** 'Account' and 'Accounts' are shown next to the Label and Plural Label fields respectively.
- Enter Record Name Label and Format:**
  - Record Name:** A text input field with a red box and arrow pointing to it.
  - Example:** 'Account Name' is shown next to the Record Name field.
  - Data Type:** A dropdown menu set to 'Text'.
- Optional Features:**
  - Allow Reports:** A checkbox with a red box and arrow pointing to it.
  - Allow Search:** A checkbox with a red box and arrow pointing to it.
- Object Classification:**
  - Allow Sharing:** A checked checkbox.
  - Allow Bulk API Access:** A checked checkbox.
  - Allow Streaming API Access:** A checked checkbox.
- Deployment Status:**
  - Deployed:** A selected radio button.
- Search Status:**
  - Allow Search:** A checkbox with a red box and arrow pointing to it.
- Object Creation Options:**
  - Add Notes and Attachments related list to default page layout:** An unchecked checkbox.
  - Launch New Custom Tab Wizard after saving this custom object:** An unchecked checkbox.
- Buttons:** 'Save', 'Save & New', and 'Cancel' buttons are at the bottom right. The 'Save' button is highlighted with a red box and arrow.

4. Click on Save.

## Activity 1: Create Venue Object

To create an object:

1. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
  - 1) Enter the label name → Venue
  - 2) Plural label name → Venues
  - 3) 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.**

To create an object:

- ### Milestone 3- Tabs

## Activity 1: Creating a Custom Tab

### To create a Tab:(Venue)

- 
- The screenshot shows the Salesforce Lightning Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Custom Tabs'. The 'Custom Tabs' section is active, displaying a list of custom tabs. A red box highlights the 'New' button in the 'Custom Object Tabs' table. Another red box highlights the 'New' button in the 'Custom Page Tabs' table. The page also shows a list of existing custom tabs with columns for Action, Label, Tab Style, and Description.
- | Action       | Label         | Tab Style     | Description  |
|--------------|---------------|---------------|--|
| Go to Detail | Accounts      | Check         | created to setup with student activity (junction object) |
| Go to Detail | Accounts      | Appstore      |  |
| Go to Detail | Accounts      | Classroom     |  |
| Go to Detail | Students      | Journal       | This tab is related to Hotel Reservation App             |
| Go to Detail | Students      | Portfolio     |  |
| Go to Detail | Students      | Phone         | This tab is related to College Management System         |
| Go to Detail | Order Details | Contents      |  |
| Go to Detail | Students      | Check         |  |
| Go to Detail | Students      | Computer      |  |
| Go to Detail | Students      | Check         |  |
| Go to Detail | Reservations  | Highway Signs | This tab is related to Hotel Reservation App             |
| Go to Detail | Students      | Highway Signs | This tab is related to Hotel Reservation App             |
| Go to Detail | Students      | Appstore      |  |
| Go to Detail | Students      | Journal       | This tab is related to College Management System         |

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

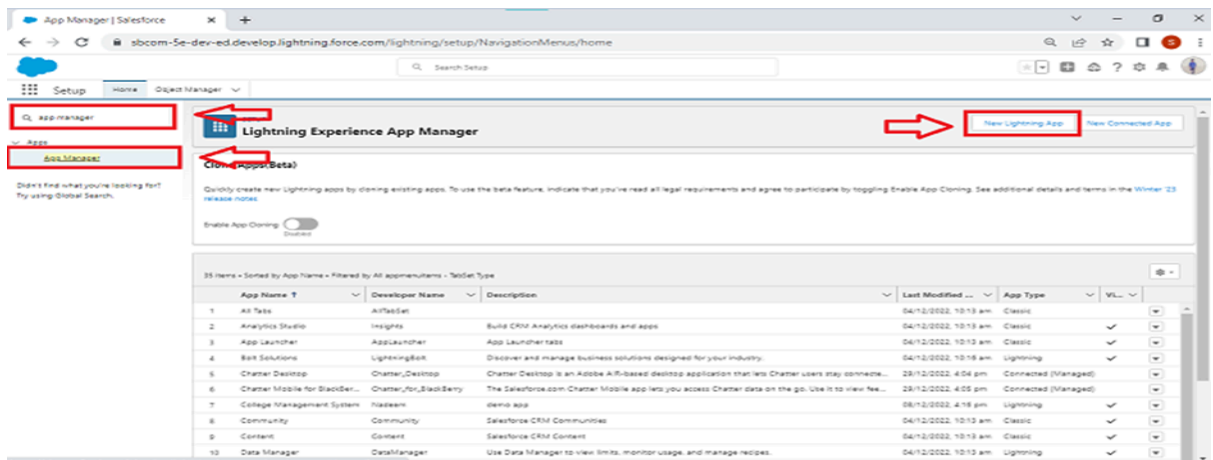
1. Now create the Tabs for the remaining Objects, they are “Drop-Off Point, Task, Volunteer, Execution Details”.
2. Follow the same steps as mentioned in Activity -1 .

## 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.



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

App Name : FoodConnect

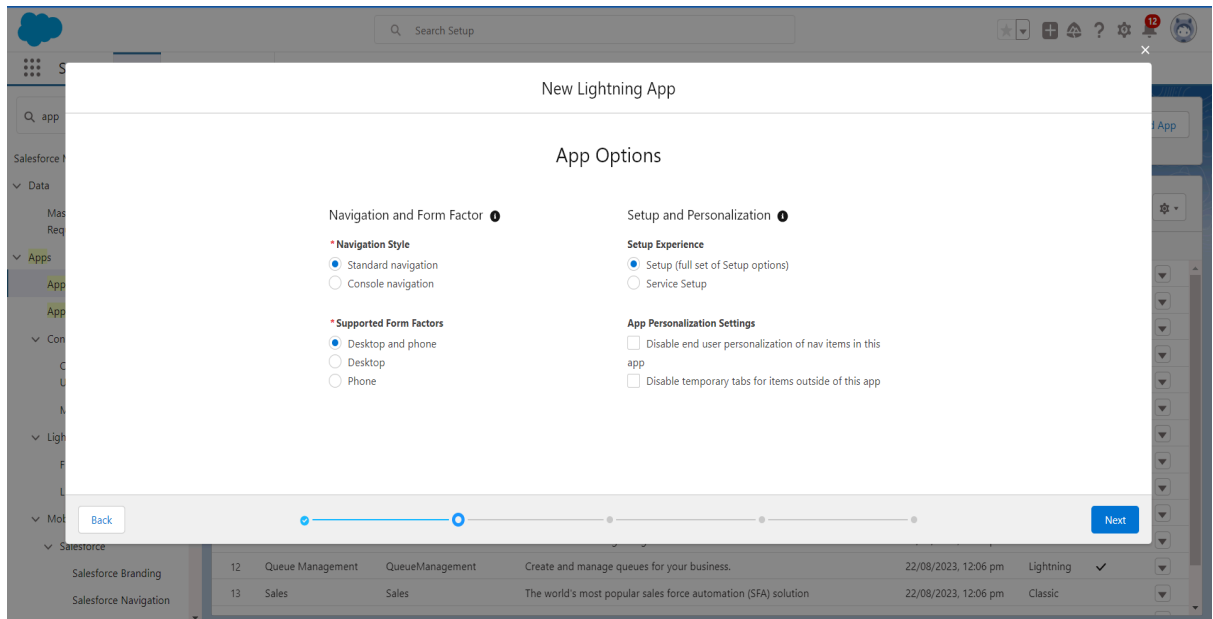
Developer Name : This will auto populated

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

Primary color hex value : keep this default.

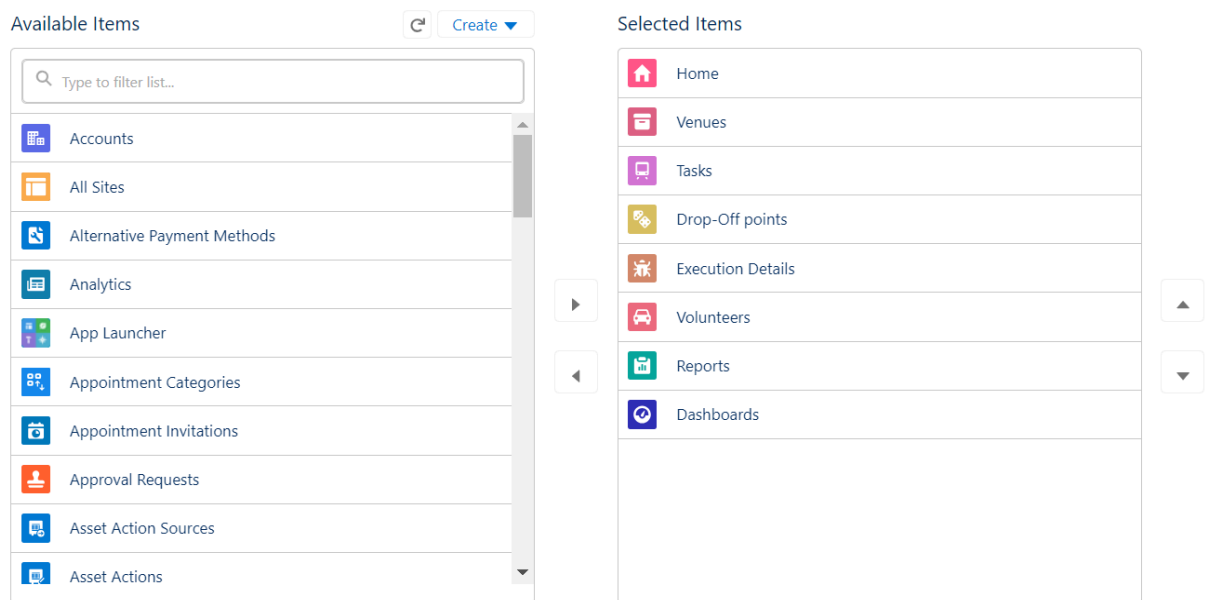
3. Then click Next → (App option page) Set Navigation Style as Standard Navigation → Next.





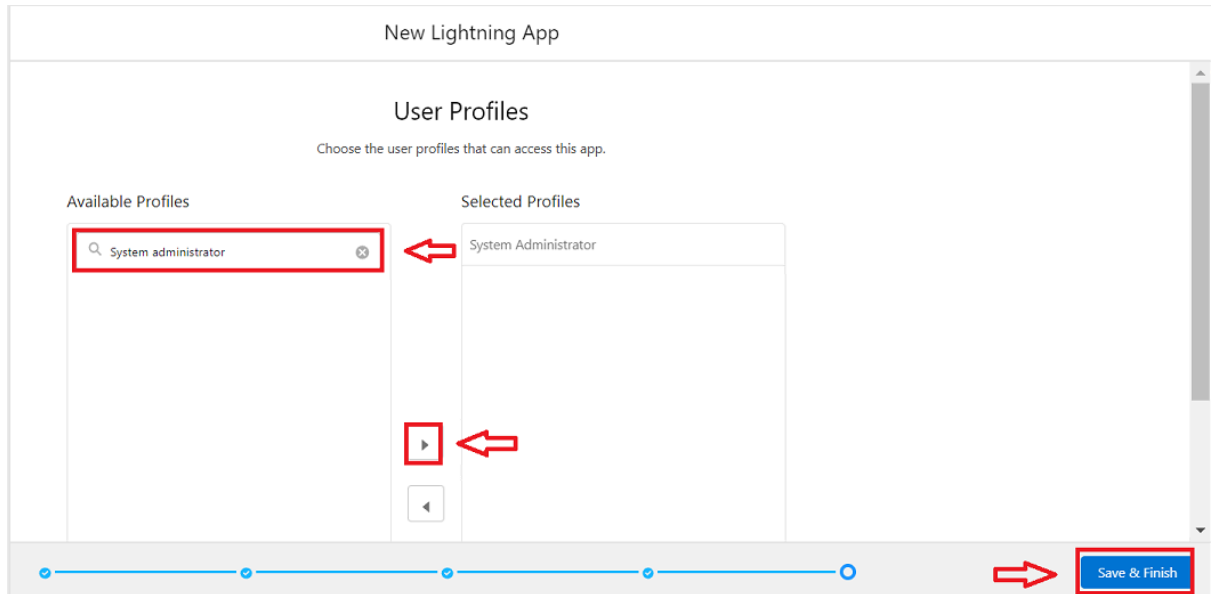
4. (Utility Items) keep it as default → Next.

5. To Add Navigation Items:



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:



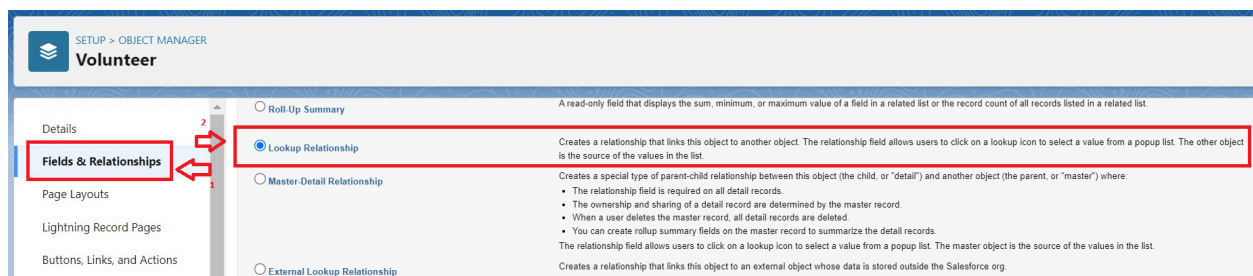
Search profiles (System administrator) in the search bar → click on the arrow button → save & finish.

## **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.

Step 2. Choose the related object

Previous Next Cancel

Select the other object to which this object is related.

Related To Drop-Off point

Previous Next Cancel

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.

**Formula Options**

Formula Return Type:

Decimal Places:

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.  
**Example:** Fahrenheit = 1.8 \* Celsius\_\_c + 32 [More Examples...](#)

distance calculation (Number) =  
DISTANCE( Location\_2\_\_c , Venue\_\_r.Location\_\_c , 'km')

#### 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.

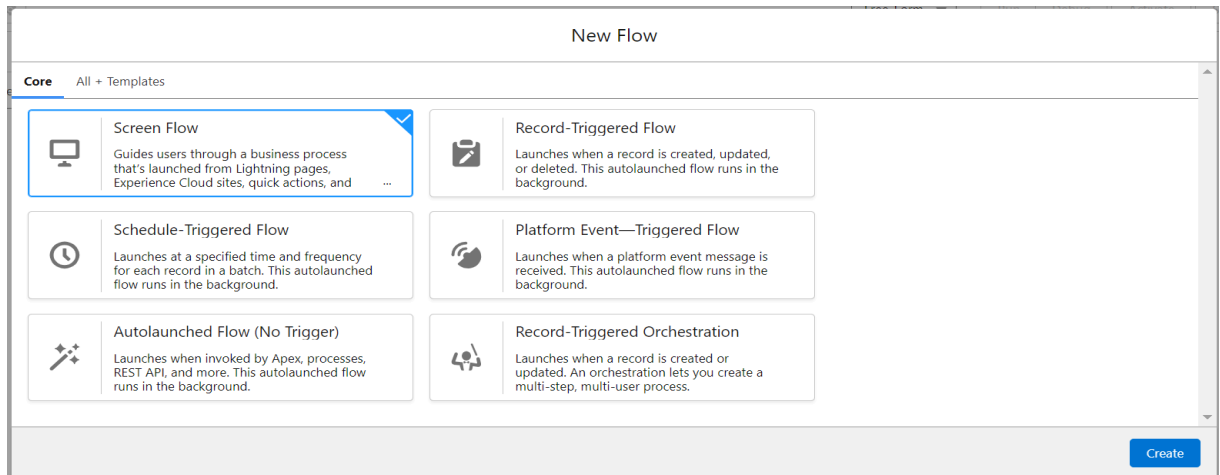
**Activity 6: Creation of fields for the Execution Details object**

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.

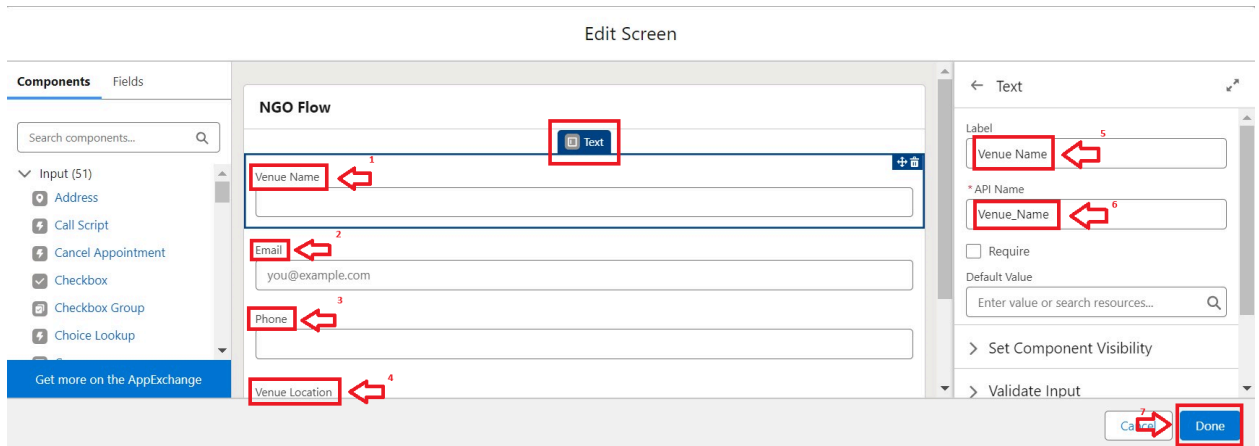
**Milestone 6 : FLOWS**

**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 A Contact_Email > Value X	
Field Contact_Phone__c	←	Value A Contact_Phone > Value X	
Field Name	←	Value A Venue_Name X	
Field Venue_Location__c	←	Value A location X	

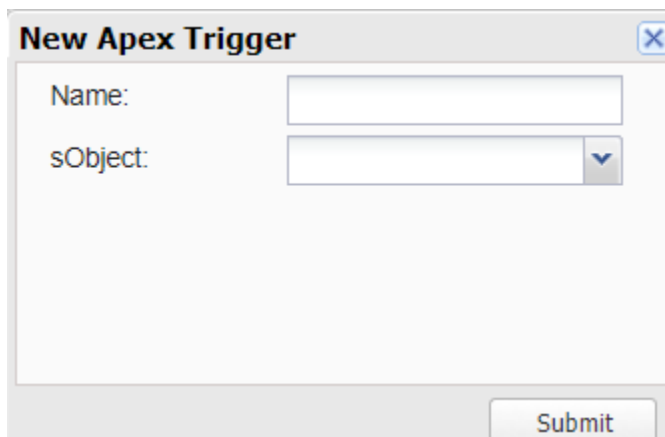
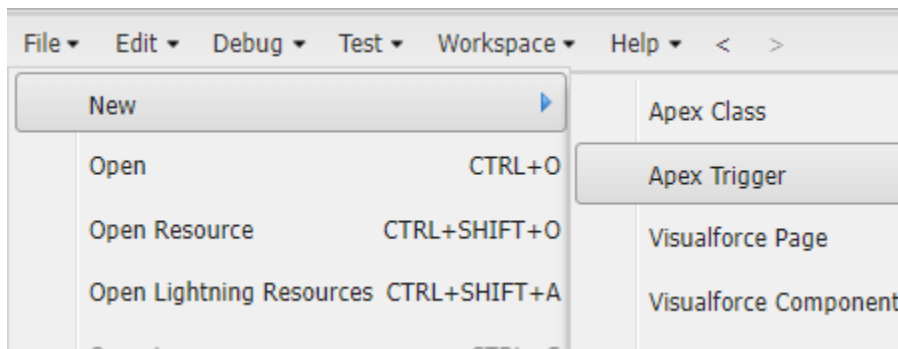
15. Click on Save as:

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.

A screenshot of the 'New Apex Trigger' dialog box. It has a title bar with a close button. Inside, there are two input fields: 'Name:' with a text box and 'sObject:' with a dropdown menu. At the bottom right, there is a 'Submit' button.

- 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](mailto: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
Last Name	Iksha_Foundation
Alias	iksh
Email	bhargavipaila1023@gmail.c
Username	ikshafoundation@sb.com
Nickname	User1711437164226559933
Title	
Company	
Department	
Division	
Role	<None Specified>
User License	Salesforce Platform
Profile	NGOs Profile
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
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.

	<a href="#">Edit</a>   <a href="#">Login</a>	Iksha_Foundation, Iksha Foundation	iksh	ikshafoundation@sb.com		<a href="#">NGOs Profile</a>
	<a href="#">Edit</a>   <a href="#">Login</a>	NSS, NSS	nnss	nss@sb.com		<a href="#">NGOs Profile</a>
	<a href="#">Edit</a>   <a href="#">Login</a>	Street_Cause, Street Cause	ssstre	streetcause@sb.com		<a href="#">NGOs Profile</a>

## 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.

<div>New</div>				
Action	Label ↑	Group Name	Created By	Created Date
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Iksha</a>	<a href="#">Iksha</a>	<a href="#">Bhargavi, Paila</a>	26/03/2024, 2:27 pm
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">NSS</a>	<a href="#">NSS</a>	<a href="#">Bhargavi, Paila</a>	26/03/2024, 2:27 pm
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Street Cause</a>	<a href="#">Street_Cause</a>	<a href="#">Bhargavi, Paila</a>	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.

**Outline**
Filters 2

**Groups**

GROUP ROWS

Add group...

Volunteer Name

GROUP COLUMNS

Add group...

**Columns**

Add column...

Venue Name

Drop-Off point Name

# Distance

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

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	-	-
<b>Subtotal</b>			6,936.3488
<b>Total (4)</b>			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**

Add Chart
 Save & Run
 Save ▾
 Close
 Run

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
<b>Subtotal</b>						
4 (1)	Bhavika	Task 1	Execution 1	Iksha Foundation Iksha_Foundation	28/03/2024	4
<b>Subtotal</b>						
<b>Total (2)</b>						

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)

Report

venue and Drop Off point

☐ Use chart settings from report

Display As

Groups

Add group...

Columns

Preview

venue and Drop Off point

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

- Click on Widget and select Chart or Table
- In Select Report : Select Volunteer Task Report.
- Then click on select
- In Add Component:

Display As : Select Line Chart

Component Theme : Select Dark (Optional)

Report

Volunteer Task

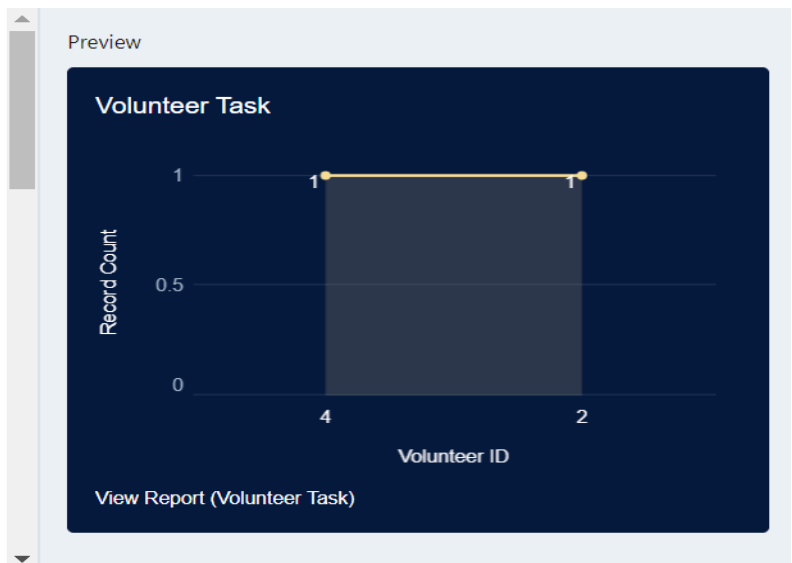
☐ Use chart settings from report

Display As

X-Axis

Volunteer ID

Y-Axis



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.

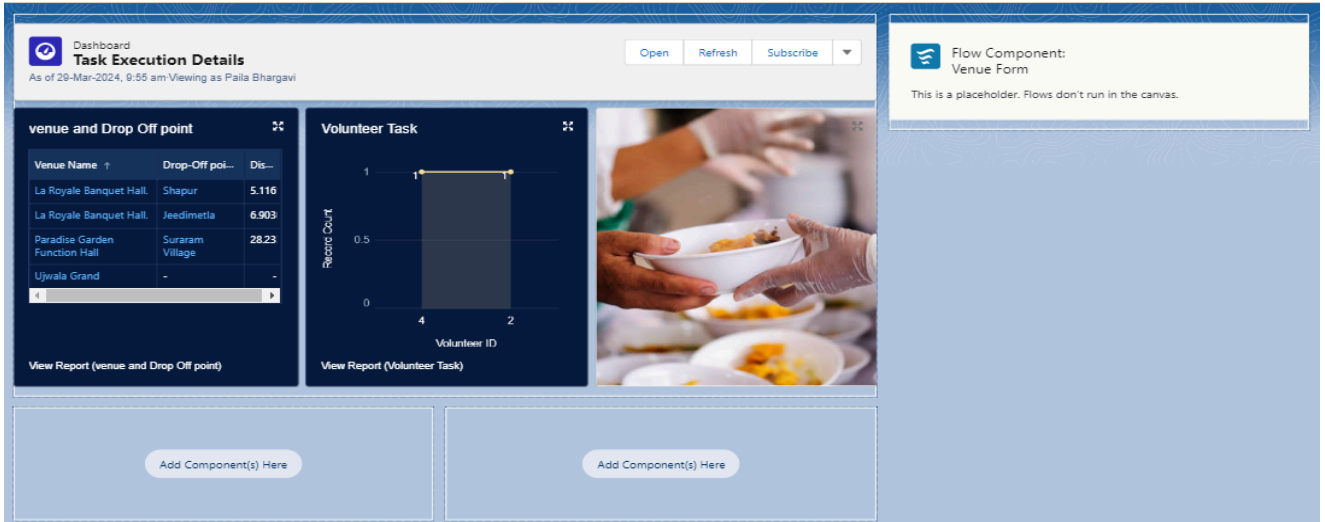
Drop-Off point Sharing Rules			
		New Recalculate	Drop-Off point Sharing Rules Help ?
Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Drop-Off point: Distance LESS OR EQUAL 15	<a href="#">Group: Iksha</a>	Read/Write
<a href="#">Edit</a>   <a href="#">Del</a>	(Drop-Off point: Distance GREATER THAN 15) AND (Drop-Off point: Distance LESS OR EQUAL 30)	<a href="#">Group: NSS</a>	Read/Write
<a href="#">Edit</a>   <a href="#">Del</a>	(Drop-Off point: Distance GREATER THAN 30) AND (Drop-Off point: Distance LESS OR EQUAL 50)	<a href="#">Group: Street Cause</a>	Read/Write

## **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.





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

**Task Execution Details**  
As of 29-Mar-2024, 9:55 am Viewing as Paila Bhargavi

**venue and Drop Off point**

Venue Name ↑	Drop-Off poi...	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	-	-

**Volunteer Task**

Record Count

Volunteer ID

**Venue Form**

Venue Name

Email

Phone

Venue Location

Next

## 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.

