



***FOODCONNECT: TO  
SUPPLY LEFTOVER FOOD TO POOR***

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## **ABSTRACT:**

The Salesforce-based project aims to create a sustainable solution for redistributing surplus food to those in need, addressing both food waste and hunger. This initiative connects food donors—such as restaurants, hotels, and event organizers—with NGOs, shelters, and community kitchens that serve the underprivileged. Using Salesforce's robust CRM and automation tools, the platform allows donors to easily register leftover food, which is then efficiently matched with nearby recipients based on real-time demand and logistical factors.

Key features of the project include automated notifications to both donors and recipients, intelligent scheduling to ensure food is picked up and delivered promptly, and tracking to monitor the food's journey from donor to beneficiary. The system also integrates with mapping and route optimization tools to minimize transportation time and reduce carbon footprints.

To support continuous improvement, the platform provides detailed analytics on food donations, recipient needs, and operational efficiency. These insights help refine the distribution network, identify areas with the highest demand, and foster stronger relationships with food donors. Additionally, the platform includes community engagement features, such as recognition programs for donors and impact reports that highlight the benefits of their contributions.

By integrating these capabilities, the Salesforce project not only addresses immediate food insecurity but also builds a replicable model for communities worldwide to tackle hunger and food waste in a more organized and impactful manner.

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# INTRODUCTION:

Food waste is a significant global issue, with millions of tons of edible food discarded every year, while millions of people face hunger and food insecurity. This disparity highlights the need for innovative solutions that can bridge the gap between food surplus and hunger. The Salesforce project, designed to supply leftover food to the poor, addresses this challenge by creating an organized, efficient, and scalable platform for food redistribution.

The project leverages Salesforce's comprehensive CRM and automation capabilities to connect food donors—such as restaurants, hotels, and event venues—with organizations that serve the underprivileged, including NGOs, shelters, and community kitchens. The platform simplifies the process of donating surplus food, ensuring that it reaches those in need promptly and safely. By automating notifications, optimizing logistics, and providing real-time tracking, the system minimizes food spoilage and ensures that surplus food is distributed where it can have the most impact.

This introduction sets the stage for a solution that not only reduces food waste but also contributes to social welfare by feeding the hungry. The Salesforce-based platform aims to create a sustainable, replicable model that can be adapted by communities worldwide, ultimately fostering a more equitable distribution of resources and addressing the critical issue of food insecurity.

# OBJECT:

Salesforce objects are key components used to store and manage data within the Salesforce platform. There are two main types:

1. **Standard Objects:** Pre-built objects provided by Salesforce, such as:
  1. **Account:** Stores information about organizations like food donors or recipient NGOs.
  2. **Contact:** Holds details about individuals associated with these organizations.
  3. **Opportunity:** Tracks potential food donations through various stages.
  4. **Case:** Manages issues that arise during the food distribution process.
2. **Custom Objects:** User-defined objects tailored to specific needs, such as:
  - **Venue:** Stores information about locations where surplus food is available, such as restaurants, hotels, or event sites.
  - **Dropoff Point:** Captures details of locations where food will be delivered, such as shelters, NGOs, or community kitchens.
  - **Task:** Manages specific actions or steps needed in the food redistribution process, like scheduling pickups, coordinating with volunteers, or confirming deliveries.
  - **Volunteer:** Tracks details about individuals who are helping with the food distribution, including their availability, assigned tasks, and contact information.
  - **Execution Details:** Holds information on the actual implementation of food distribution activities, including logistics, timing, and any issues encountered during the process.

## 1. Create Customer DetailsObject

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Enter the label name >> Customer

Details Plural label name >>

Customer Details

Enter Record Name Label and

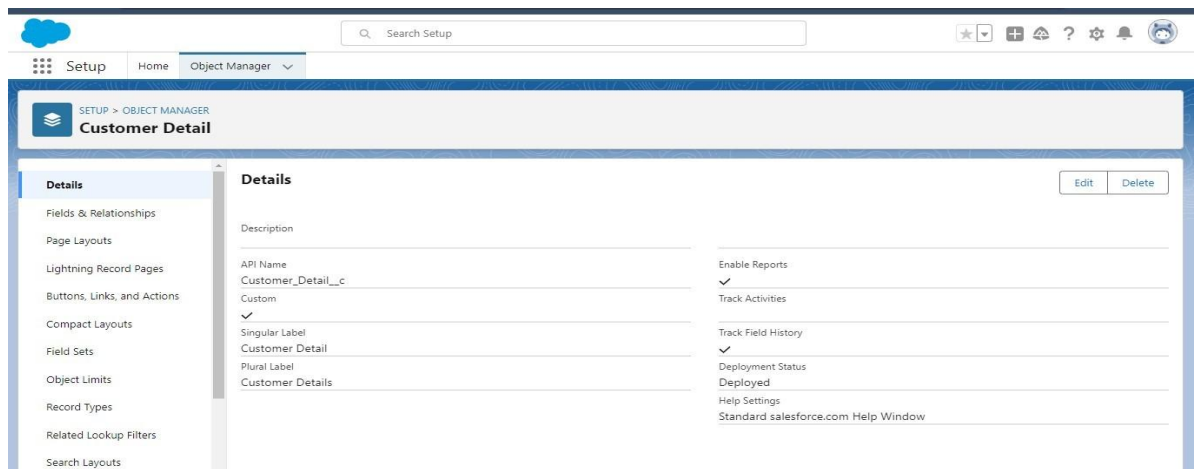
Format Record Name >>

Customer Name Data Type >>

Text

Click on Allow reports and Track Field

History, Allow search >> Save



## 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

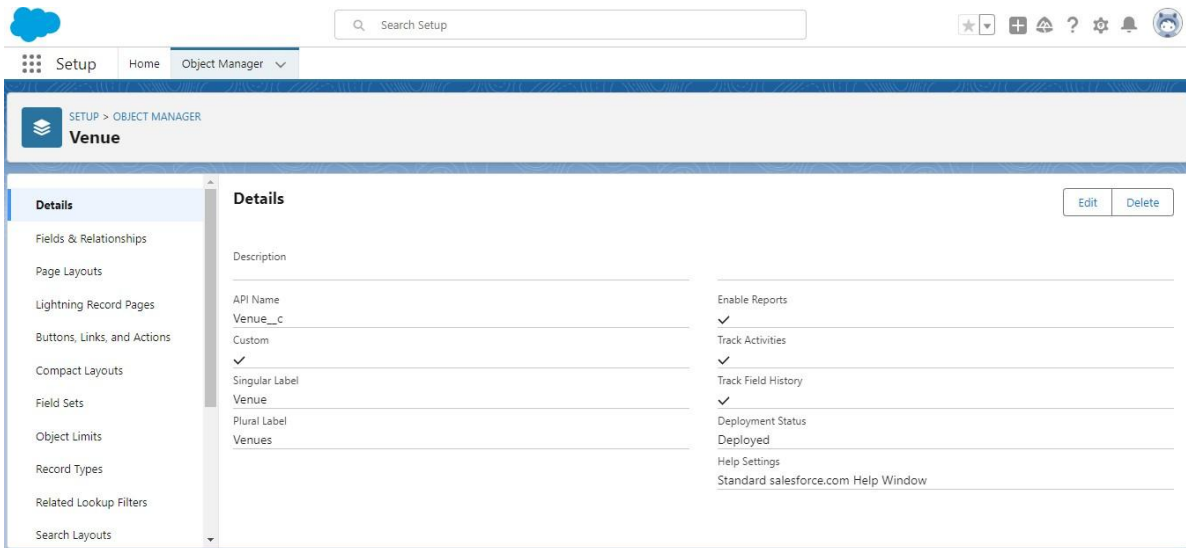
Record Name >>

Venue Name Data

Type >> Text

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

Allow search >> Save.



## 2. Create Drop-Off Point Object

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Enter the label name >> Drop-

Off Point Plural label name>>

Drop-Off Points Enter Record

Name Label and Format Record

Name >> Drop-Off point Name

Data Type >> Text

Click on Allow reports and Track Field History, Allow

Activities Allow search >> Save.

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled "Search Setup" and a navigation bar with "Setup", "Home", and "Object Manager". The "Object Manager" section is expanded, showing a list of objects. The "Drop-Off Point" object is selected, and its details are displayed. The details page has a left sidebar with a "Details" tab and a list of configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled "Details" and contains a form with the following fields: Description, API Name (Drop\_Off\_Point\_c), Custom (checked), Singular Label (Drop-Off Point), Plural Label (Drop-Off Points), Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window. There are "Edit" and "Delete" buttons in the top right corner of the details section.

### 3. Create Task Object

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Enter the label

name>> Task Plural

label name>> Tasks

Enter Record Name Label and Format

Record Name >>

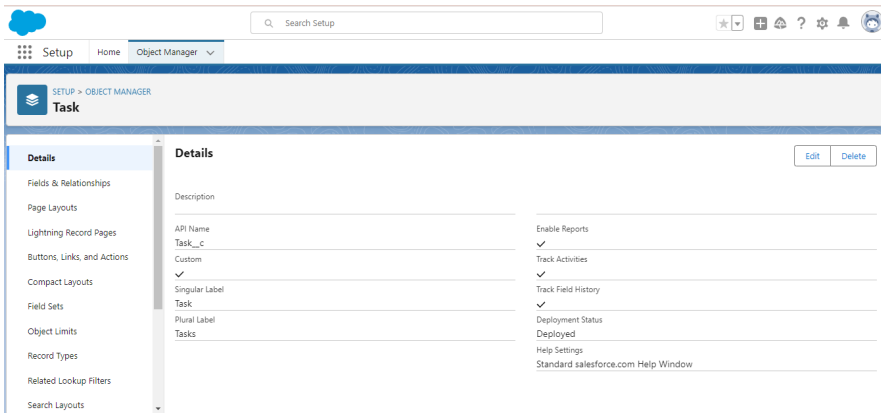
Task Name Data

Type >> Text

Click on Allow reports and Track Field History, Allow Activities

Allow search >> Save.





## 4. Create Volunteer Object

To create an object:

From the setup page >> Click on Object Manager>> Click on Create >> Click on Custom Object. Enter the label name>> Volunteer Plural label name>> Volunteers Enter Record Name Label and

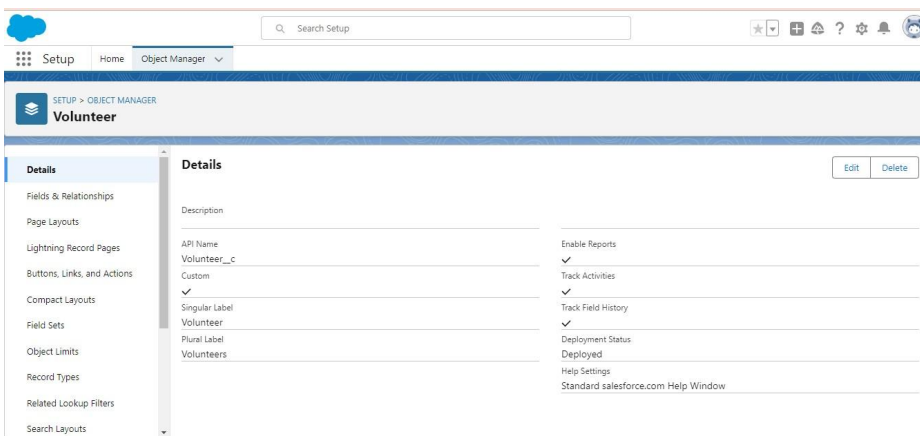
Format Record Name >>

Volunteer Name Data Type >>

Text

Click on Allow reports and Track Field History, Allow

Activities Allow search >> Save.



## 5. Create Execution Details Object

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Enter the label name >> Execution

Detail Plural label name >>

Execution Details Enter Record

Name Label and Format Record

Name >> Execution Detail Name

Data Type >> Text

Click on Allow reports and Track Field History, Allow

Activities Allow search >> Save.

The screenshot shows the Salesforce Setup interface for creating a custom object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main header displays 'SETUP > OBJECT MANAGER' and 'Execution Detail'. A left sidebar lists various configuration options under the 'Details' section, including 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'. The main content area is titled 'Details' and contains a form for configuring the object. The form includes fields for 'API Name' (Execution\_Detail\_\_c), 'Custom' (checked), 'Singular Label' (Execution Detail), 'Plural Label' (Execution Details), 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (Deployed), and 'Help Settings' (Standard salesforce.com Help Window). 'Edit' and 'Delete' buttons are located in the top right corner of the form.

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

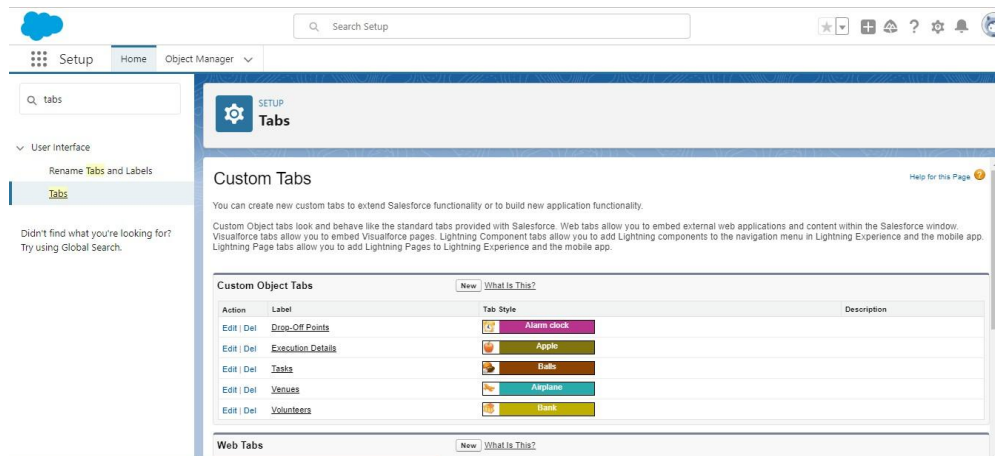
# TABS

A tab is like a user interface that is used to build records for objects and to view the records in the objects.

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



## 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 above

# THE LIGHTNING APP

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

## 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.
  1. 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.
2. Then click Next >> (App option page) Set Navigation Style as Standard Navigation >> Next.
3. (Utility Items) keep it as default >> Next.
4. 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.
5. To Add User Profiles:  
Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

Lightning App Builder | App Settings | Pages | FoodConnect | ? Help

**App Settings**

**App Details & Branding**

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

**App Details & Branding**

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

**App Details**

\* App Name

\* Developer Name

Description

**App Branding**

Image

Primary Color Hex Value

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

**App Launcher Preview**

FoodConnect

App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)
- Navigation Items
- User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Create ▾

Type to filter list...

Accounts

All Sites

Alternative Payment Methods

Analytics

App Launcher

Appointment Categories

Appointment Invitations

Annual Banquets



Selected Items

Venues

Tasks

Volunteers

Drop-Off Points

Execution Details

▲

▼

App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)
- Navigation Items
- User Profiles

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Type to filter list...

Analytics Cloud Integration User

Analytics Cloud Security User

Authenticated Website

Authenticated Website

B2B Reordering Portal Buyer Profile

Contract Manager

Custom: Marketing Profile

Custom: Sales Profile

Custom: Support Profile



Selected Profiles

System Administrator

# FIELDS

## 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 Master Detail 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.
- 8.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, a search bar labeled "Search Setup", and various utility icons. The main navigation menu on the left includes Setup, Home, and Object Manager. The "Object Manager" section is expanded, showing a list of objects. The "Drop-Off Point" object is selected, and the "Fields & Relationships" tab is active. The "Fields & Relationships" section displays a table with 9 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table lists fields such as Created By, Distance, distance calculation, Drop-Off Point Name, Last Modified By, Location 2, Owner, State, and Venue. The "Venue" field is highlighted, showing it is a Lookup relationship to the Venue object, with a controlling field and indexed.

| FIELD LABEL          | FIELD NAME              | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|----------------------|-------------------------|--------------------|-------------------|---------|
| Created By           | CreatedById             | Lookup(User)       |                   |         |
| Distance             | Distance__c             | Number(18, 0)      |                   |         |
| distance calculation | distance_calculation__c | Formula (Number)   |                   |         |
| Drop-Off Point Name  | Name                    | Text(80)           |                   | ✓       |
| Last Modified By     | LastModifiedById        | Lookup(User)       |                   |         |
| Location 2           | Location_2__c           | Geolocation        |                   |         |
| Owner                | OwnerId                 | Lookup(User,Group) |                   | ✓       |
| State                | State__c                | Picklist           |                   |         |
| Venue                | Venue__c                | Lookup(Venue)      |                   | ✓       |

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

Volunteer

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

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Fields & Relationships

14 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

| FIELD LABEL      | FIELD NAME       | DATA TYPE              | CONTROLLING FIELD | INDEXED |
|------------------|------------------|------------------------|-------------------|---------|
| Address          | Address_c        | Long Text Area(32768)  |                   |         |
| Age              | Age_c            | Number(18, 0)          |                   |         |
| Available On     | Available_On_c   | Date                   |                   |         |
| Contact Number   | Contact_Number_c | Number(18, 0)          |                   |         |
| Created By       | CreatedById      | Lookup(User)           |                   |         |
| Date of Birth    | Date_of_Birth_c  | Date                   |                   |         |
| Drop-Off Point   | Drop_Off_Point_c | Lookup(Drop-Off Point) |                   | ✓       |
| Email            | Email_c          | Email                  |                   |         |
| Execution ID     | Execution_ID_c   | Auto Number            |                   |         |
| Gender           | Gender_c         | Picklist               |                   |         |
| Last Modified By | LastModifiedById | Lookup(User)           |                   |         |
| Owner            | OwnerId          | Lookup(User Group)     |                   | ✓       |
| Volunteer ID     | Volunteer_ID_c   | Auto Number            |                   |         |
| Volunteer Name   | Name             | Text(80)               |                   | ✓       |

Next >> Next >> Save.

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

Venue

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Fields & Relationships

11 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

| FIELD LABEL      | FIELD NAME        | DATA TYPE             | CONTROLLING FIELD | INDEXED |
|------------------|-------------------|-----------------------|-------------------|---------|
| Contact Email    | Contact_Email__c  | Email                 |                   |         |
| Contact Phone    | Contact_Phone__c  | Phone                 |                   |         |
| Created By       | CreatedById       | Lookup(User)          |                   |         |
| Last Modified By | LastModifiedById  | Lookup(User)          |                   |         |
| Location         | Location_c        | Geolocation           |                   |         |
| Location 2       | Location_2__c     | Geolocation           |                   |         |
| Owner            | OwnerId           | Lookup(User Group)    |                   | ✓       |
| Venue            | Venue_c__c        | Lookup(Venue)         |                   | ✓       |
| Venue            | Venue_c           | Lookup(Venue)         |                   | ✓       |
| Venue Location   | Venue_Location__c | Long Text Area(32768) |                   |         |
| Venue Name       | Name              | Text(80)              |                   | ✓       |

Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

Task

Details

Fields & Relationships

16 Items, Sorted by Field Label

Quick Find

New


Deleted Fields

Field Dependencies

Set History Tracking

Fields & Relationships

| FIELD LABEL                 | FIELD NAME              | DATA TYPE               | CONTROLLING FIELD | INDEXED |
|-----------------------------|-------------------------|-------------------------|-------------------|---------|
| Page Layouts                | Created By              | Lookup(User)            |                   |         |
| Lightning Record Pages      | Date                    | Date                    |                   |         |
| Buttons, Links, and Actions | Distance                | Number(14, 4)           |                   |         |
| Compact Layouts             | Drop-Off Point          | Lookup(Drop-Off Point)  |                   | ✓       |
| Field Sets                  | Feedback                | Long Text Area(32768)   |                   |         |
| Object Limits               | Food Category           | Picklist (Multi Select) |                   |         |
| Record Types                | Last Modified By        | Lookup(User)            |                   |         |
| Related Lookup Filters      | Name of the Person      | Text(18)                |                   |         |
| Search Layouts              | Number of People Served | Number(18, 0)           |                   |         |
| List View Button Layout     | Owner                   | Lookup(User Group)      |                   | ✓       |
| Restriction Rules           | Phone                   | Phone                   |                   |         |
| Scoping Rules               | Rating                  | Picklist                |                   |         |
| Triggers                    | Sponsored By            | Lookup(Venue)           |                   | ✓       |
| Flow Triggers               | Task ID                 | Auto Number             |                   |         |
| Validation Rules            | Task Name               | Text(80)                |                   | ✓       |
|                             | Venue_c                 | Lookup(Drop-Off Point)  |                   | ✓       |



Search Setup

★

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⚙

🔔

👤

SetupHomeObject 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

Restriction Rules

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

| FIELD LABEL           | FIELD NAME       | DATA TYPE          | CONTROLLING FIELD | INDEXED |   |
|-----------------------|------------------|--------------------|-------------------|---------|---|
| Created By            | CreatedById      | Lookup(User)       |                   |         |   |
| Execution Detail Name | Name             | Text(80)           |                   | ✓       | ▼ |
| Last Modified By      | LastModifiedById | Lookup(User)       |                   |         |   |
| Owner                 | OwnerId          | Lookup(User,Group) |                   | ✓       |   |
| Task                  | Task__c          | Lookup(Task)       |                   | ✓       | ▼ |
| Volunteer             | Volunteer__c     | Lookup(Volunteer)  |                   | ✓       | ▼ |



# FLOWS

## 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 look 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} Field : Value = Contact\_Phone\_

c : {!Contact\_Phone.value} Field : Value = Name :

{!Venue\_Name}

Field : Value = Venue\_Location\_c :

{!location} Field : Value = Location\_Latitude\_

s : {!latitude}

Field : Value = Location\_Longitude\_\_s : {!longitude}

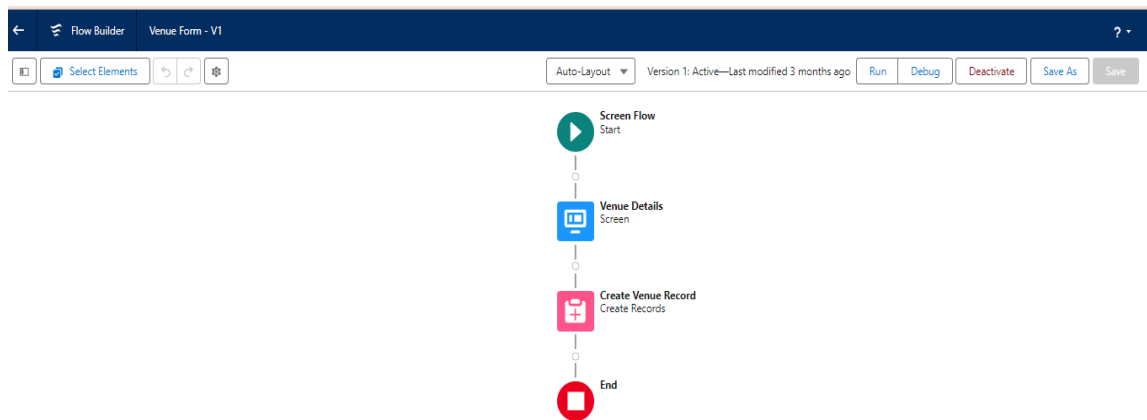
14. This would look like:

15. Click on Save as:

Flow Label : Venue

Form Flow API Name

: Venue\_Form



# TRIGGERS

## Create a Trigger

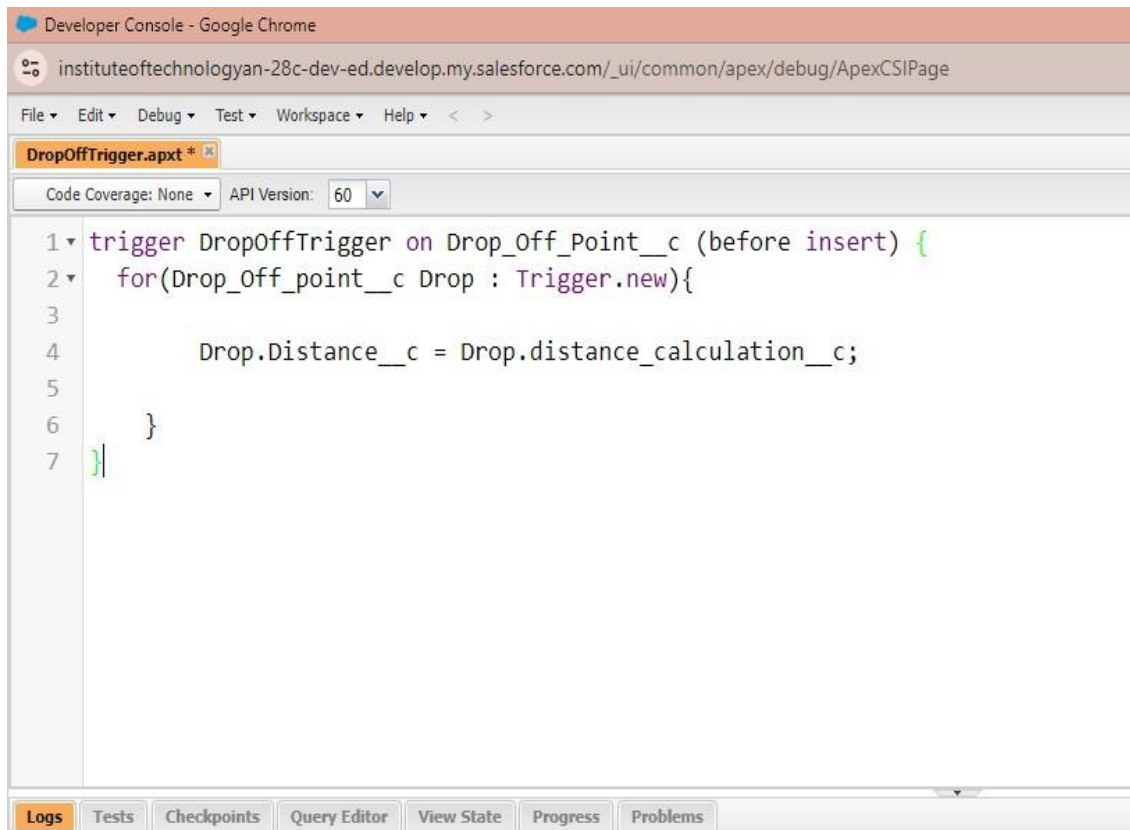
1. Log into the trailhead account, navigate to the gear icon in the top right corner.
2. Click on developer console and you will be navigated to a new console window.
3. Click on the File menu in the toolbar, and click on new >> Trigger.
4. Enter the trigger name and the object to be triggered.
5. Enter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

DropOffTrigger

sObject: Drop-Off

Point

6. Click on Submit.



The screenshot shows the Salesforce Developer Console interface. The top bar indicates 'Developer Console - Google Chrome' and the URL is 'instituteoftechnologyan-28c-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage'. The menu bar includes File, Edit, Debug, Test, Workspace, and Help. The editor window is titled 'DropOffTrigger.apxt' and shows the following Apex code:

```
1 trigger DropOffTrigger on Drop_Off_Point__c (before insert) {  
2     for(Drop_Off_point__c Drop : Trigger.new){  
3  
4         Drop.Distance__c = Drop.distance_calculation__c;  
5  
6     }  
7 }
```

The bottom of the console shows tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems.

To create a matching rule to an Customer details Object

1. Go to quick find box in setup and search for matching Rule.
2. Click on matching rule >> click on New Rule.
3. Select the object as Customer details and click Next.
4. Give the Rule name : Matching customer details
5. Unique name : is auto populated

6. Define the matching criteria as

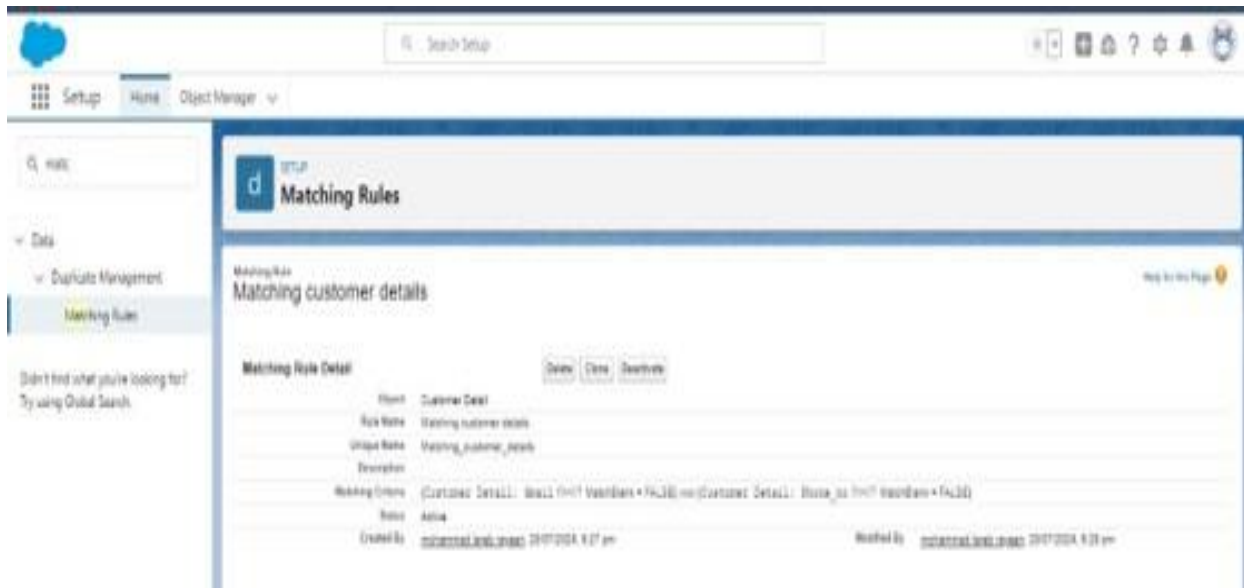
7. Field Matching Method

1. Gmail Exact

2. Phone Number Exact

8. Click save.

9. After saving click on activate



# 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

1. Then click on Save

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, a search bar labeled "Search Setup", and various utility icons. The left sidebar shows the "Setup" menu with "Home" and "Object Manager" options. The "Profiles" section is selected, and a search for "profile" is shown. The main content area displays the "Clone Profile" dialog. The dialog prompts the user to "Enter the name of the new profile." and states "You must select an existing profile to clone from." Below this, a table lists the existing profile details:

|                  |                        |
|------------------|------------------------|
| Existing Profile | Standard Platform User |
| User License     | Salesforce Platform    |
| Profile Name     | NGOs Profile           |

At the bottom of the dialog are "Save" and "Cancel" buttons. A "Required Information" message is visible on the right side of the dialog.

# CREATION OF USERS

In our Project we consider them as NGO's

## 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

### 1. Click on Save

The screenshot shows the Salesforce 'User Edit' interface. The left sidebar contains navigation links for 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main content area is titled 'User Edit' and 'Iksha Foundation Iksha\_Foundation'. It includes a 'General Information' section with fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' dropdown is set to '<None Specified>', 'User License' is 'Salesforce Platform', and 'Profile' is 'NGOs Profile'. The 'Active' checkbox is checked. Below these are various user type checkboxes: Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type, Data.com Monthly Addition Limit, Accessibility Mode (Classic Only), High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, Debug Mode, and Make Setup My Default Landing Page. The 'Salesforce CRM Content User' checkbox is also checked. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

## Creation of User2, User3

2. Give Different First Name, Last Name based on Different NGO's.

[illegible]



# PUBLIC GROUPS

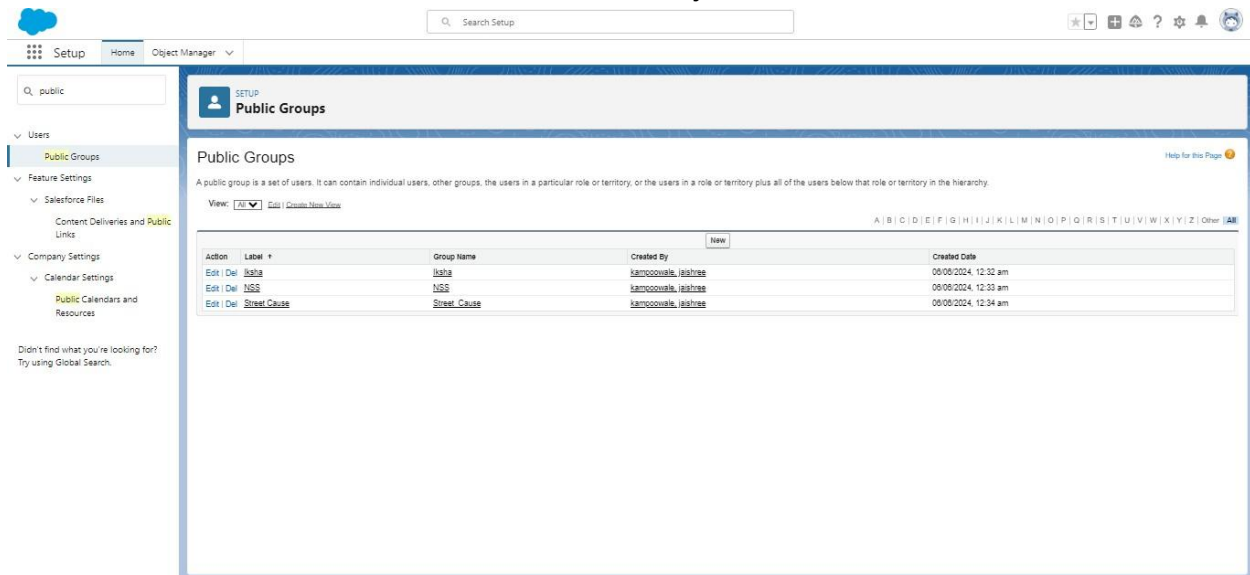
## Creation of Public Group 1

1. Go to setup page >> type Public Groups in Quick Find bar >> click on Public Groups >> click on New.
2. Under Group Information: Label : Iksha

Group Name : Iksha

Grant Access Using Hierarchies : Check

1. In Search, Select Users.
2. In Selected Members Add Iksha Foundation and System Administrator



The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with the following items: Setup, Home, Object Manager, Users, Public Groups (selected), Feature Settings, Salesforce Files, Content Deliveries and Public Links, Company Settings, Calendar Settings, and Public Calendars and Resources. The main content area is titled 'Public Groups' and includes a description: 'A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.' Below the description is a table with the following columns: Action, Label, Group Name, Created By, and Created Date. The table contains three rows of data:

| Action     | Label        | Group Name   | Created By         | Created Date         |
|------------|--------------|--------------|--------------------|----------------------|
| Edit   Del | Iksha        | Iksha        | kamoonvalle, iksha | 09/09/2024, 12:32 am |
| Edit   Del | NSS          | NSS          | kamoonvalle, iksha | 09/09/2024, 12:33 am |
| Edit   Del | Street_Cause | Street_Cause | kamoonvalle, iksha | 09/09/2024, 12:34 am |

## 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.

# REPORT TYPES

## 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

1. Click on Next
2. Near Click to relate another Object Select Drop-Off Points.
3. And also select "A" records may or may not have related "B" records.
4. Now again Near Click to relate another Object Select Volunteers.
5. Now click on Save

Setup

Home

Object Manager

Search Setup

Q report

Feature Settings

Analytics

Reports & Dashboards

Access Policies

Historical Trending

Report Types

Reporting Snapshots

Reports and Dashboards Settings

Security

Guest User Sharing Rule Access

Report

Didn't find what you're looking for?  
Try using Global Search.

Report Types

Setup

Edit Custom Report Type

Venue with DropOff with Volunteer

Help for this Page

Define the Custom Report Type

Save

Cancel

Report Type Focus

Primary Object

Venues

Identification

Report Type Label

Venue with DropOff with Volunteer

Report Type Name

Venue\_with\_DropOff\_with\_

Note: Description will be visible to users who create reports.

Description

Venue with DropOff with Volunteer

Report Type Category

Other Reports

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

Deployment Status

In Development

Deployed

Save

Cancel

Setup

Home

Object Manager

Search Setup

Q report

Feature Settings

Analytics

Reports & Dashboards

Access Policies

Historical Trending

Report Types

Reporting Snapshots

Reports and Dashboards Settings

Security

Guest User Sharing Rule Access

Report

Didn't find what you're looking for?  
Try using Global Search.

Report Types

Setup

Edit Custom Report Type

Volunteers with Execution Details and Tasks.

Help for this Page

Define the Custom Report Type

Save

Cancel

Report Type Focus

Primary Object

Volunteers

Identification

Report Type Label

Volunteers with Execution Details and Tasks.

Report Type Name

Volunteers\_with\_Execution

Note: Description will be visible to users who create reports.

Description

Volunteers with Execution Details and Tasks.

Report Type Category

Other Reports

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

Deployment Status

In Development

Deployed

Save

Cancel

## **REPORTS**

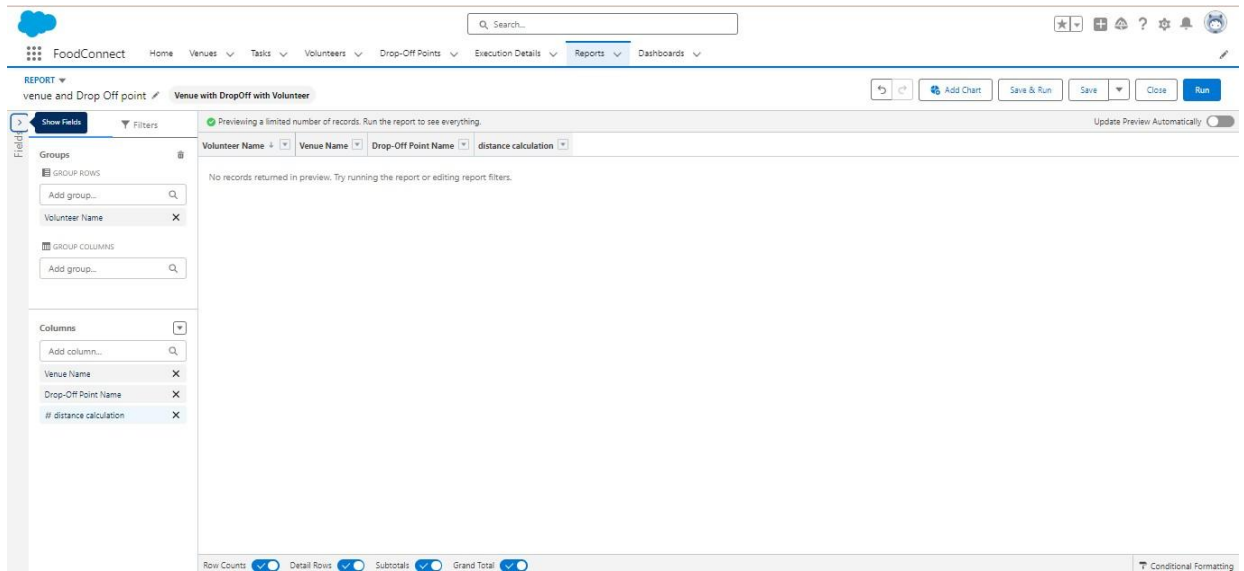
### **Creation of Report on Venue with DropOff with Volunteer**

1. Go to the app(FoodConnect) >> click on the reports tab
2. Click on New Folder.

Folder Label : Custom Reports

Folder Unique Name : CustomReports

1. Open Custom Reports and click on New Report
2. Select Report Type : Venue with DropOff with Volunteer
3. Then click on Start Report.
4. In GROUP ROWS : Add Volunteer Name
5. In Columns : Add Venue Name, Drop-Off point Name, Distance.
1. Now click on Save & Run.
2. Give Label as :
3. Report Name : venue and Drop Off point
4. Report Unique Name : Auto Populated
5. Click on Select Folder and select Custom Report, then click on Save.



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

1. Go to the app(FoodConnect) >> click on the reports tab
2. Click on Custom Reports Folder and click on New Report
3. Select Report Type : Volunteers with Execution Details and Tasks.
4. Then click on Start Report.
5. In GROUP ROWS : Volunteer ID
6. In Columns : Add Volunteer : Volunteer Name, Task : Task Name, Execution Detail : Execution Detail Name, Volunteer: Owner Name, Task: Date, Task : Rating.

1. Now click on Save & Run.

2. Give Label as :

Report Name : Volunteer Task

Report Unique Name : Auto Populated

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



# DASHBOARDS

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


1. Open Custom Dashboards and click on New Dashboards
2. Name : Organization Details
3. Click on Widget and select Chart or Table
4. In Select Report : Select venue and Drop Off point Report.
5. Then click on select
6. In Add Component:

Display As : Select Lightning Table

Component Theme : Select Dark

(Optional)

1. Now click on save.



Q Search...


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FoodConnectHomeVenuesTasksVolunteersDrop-Off PointsExecution DetailsReportsDashboards

Dashboard

Organization Details

Last refreshed 77 days ago. Refresh this dashboard to see the latest data.  
As of 07-Jun-2024, 12:53 am Viewing as jashree kampoowale

RefreshEditSubscribe

venue and Drop Off point

To view this table, refresh the dashboard.

View Report

Volunteer Task

We can't draw this chart because there is no data.

View Report (Volunteer Task)



# SHARING RULES

## 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.

The screenshot displays the AWS IAM console's 'Sharing Settings' page. The left sidebar shows the navigation menu with 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Sharing Settings' and includes sections for 'Organization-Wide Defaults', 'Other Settings', 'Sharing Rules', and 'Sharing Overrides'.

**Organization-Wide Defaults:** This section shows default internal and external access settings for 'Drop-Off Point' objects. The 'Default internal access' is set to 'Public Read/Write', and the 'Default external access' is set to 'Private'. The 'Grant access using master roles' checkbox is checked.

**Other Settings:** This section includes options for 'Manager groups', 'Secure guest user record access' (checked), and 'Require permission to view record names in listing fields'.

**Sharing Rules:** This section displays a table of 'Drop-Off Point Sharing Rules'. The table has columns for 'Action', 'Criteria', 'Shared With', and 'Access Level'. There are three rules listed:

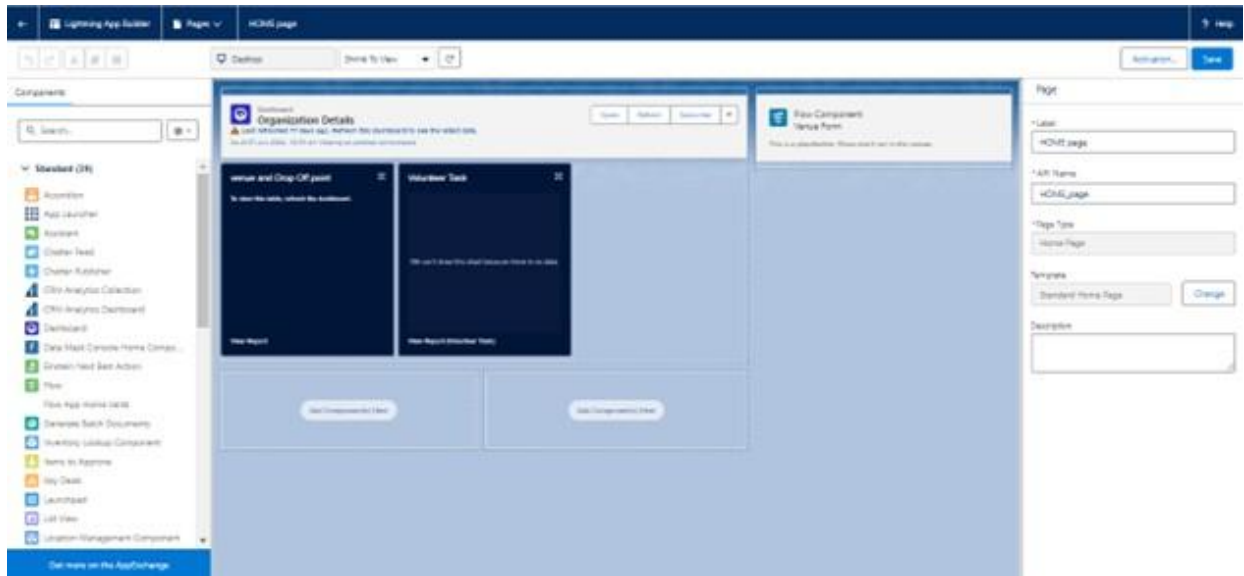
| Action | Criteria   | Shared With  | Access Level |
|--------|--|--------------|--------------|
| Drop   | Distance (Drop-Off Point) from 10                              | Street Cause | Read Only    |
| Drop   | Distance (Drop-Off Point) from 10 and (Drop-Off Point) from 20 | Street Cause | Read Only    |
| Drop   | Distance (Drop-Off Point) from 20 and (Drop-Off Point) from 50 | Street Cause | Read Only    |

**Sharing Overrides:** This section shows a table of profiles that override sharing rules. The table has columns for 'Profile', 'Custom Profile', 'View of Data', 'Organization-Wide Permissions', 'Monthly of Data', 'View of Data', 'Drop-Off Point Permissions', and 'Monthly of Data'. The profiles listed are 'Analytics Cloud Integration User' and 'System Administrator'.

# HOME PAGE

## 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
1. Near Components search for Dashboard, then Drag and Drop it in first Section.
  2. Click on Save and Activation, then click on App Default, then Add Assignments.
  3. Add FoodConnect App and then Save.
  4. FoodConnect Home Page would Look Like this.



## **CONCLUSION**

The Salesforce-based food redistribution project effectively addresses the dual challenges of food waste and hunger by creating a streamlined, organized system for managing surplus food. Through the use of custom objects such as Venue, Dropoff Point, Task, Volunteer, and Execution Details, the platform ensures that all aspects of the food donation and distribution process are meticulously tracked and managed.

By automating key tasks, optimizing logistics, and providing real-time data insights, the project not only improves operational efficiency but also maximizes the impact of food donations. Volunteers are better coordinated, food is delivered promptly and safely, and the system adapts to the needs of both donors and recipients.

Ultimately, this project demonstrates the power of Salesforce in creating scalable, sustainable solutions that benefit both communities and the environment. It sets a precedent for how technology can be leveraged to tackle pressing social issues, offering a replicable model that can be adapted by other communities worldwide to address food insecurity.