

FOOD CONNECT-To Supply Leftover Food to Poor



Salesforce developer account creation **Creating Developer Account**

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
On the sign up form, enter the following details :

A screenshot of the Salesforce Developer Edition sign-up page. The page has a blue header with the Salesforce logo and the text "Sign up for your Salesforce Developer Edition". Below this, there is a brief description: "A full-featured copy of the Platform, for free". A call-to-action button says "Start your free trial". To the left of the form, there is a sidebar with the heading "Build enterprise-quality apps fast to bring your ideas to life" and a 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
- Customize UI with clicks or any leading-edge web framework

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

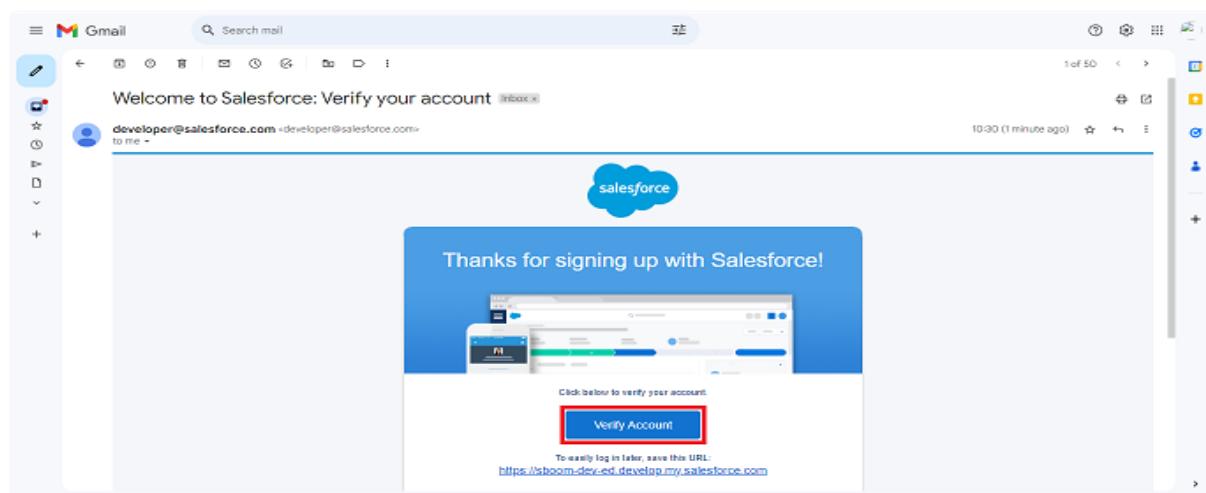
This need not be an actual email id, you can give anything in the format :

username@organization.com

Click on sign me up after filling these.

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.



Change Your Password

Enter a new password for lead@sboom.com.
Make sure to include at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

New Password
..... Good

Confirm New Password
..... Match

Security Question
In what city were you born?

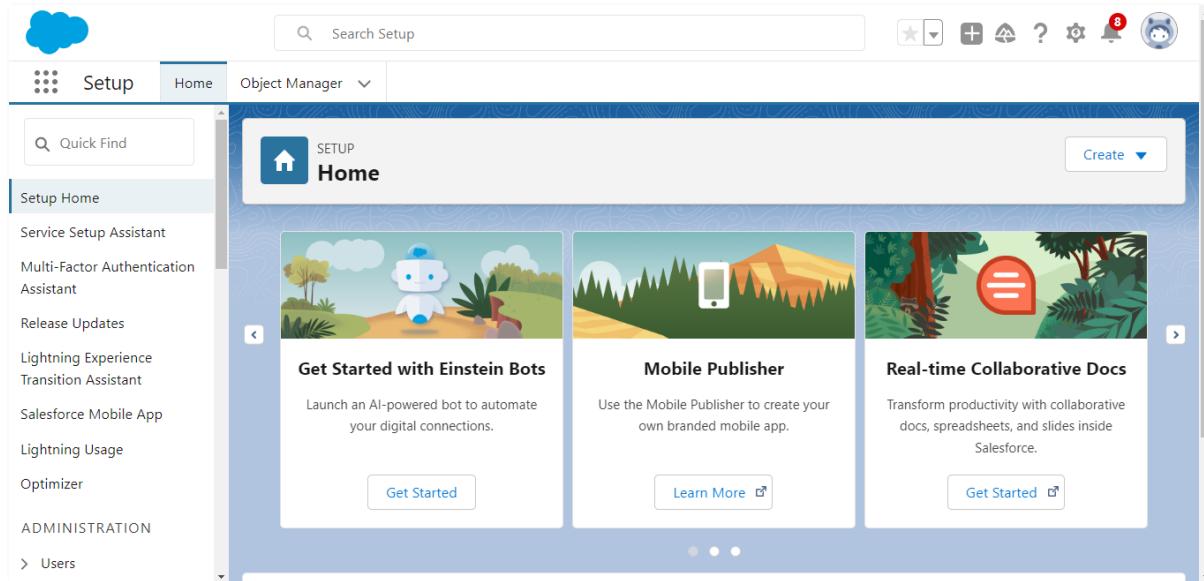
Answer
asdfghijkl

Change Password

Click on Verify Account

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.



Object Creation:

1.What is an Object? How a Custom Object is Created

Object:

- An object in Salesforce is a database table that allows you to store information specific to your organization. Objects can be standard (provided by Salesforce) or custom (created by users)

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.

In the same way Create Drop-Off Point Object,Task Object,Volunteer Object,Execution Detail Object.

Tabs Creation:

2. What is a Tab? How a Custom Tab is Created

Tab:

- A tab in Salesforce is a user interface component that allows users to create, view, and edit records for an object. Tabs are associated with standard and custom objects and can be customized to enhance the user experience.

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)

The screenshot shows the Salesforce Setup interface with the following highlights:

- Setup** button (highlighted with a red arrow).
- Home** button (highlighted with a red arrow).
- Custom Tabs** link (highlighted with a red arrow).
- Custom Object Tabs** section (highlighted with a red box).
- New** button (highlighted with a red arrow).

The 'Custom Object Tabs' table lists various tabs for different objects, each with a 'Tab Style' icon and a 'Description' column. The columns are:

Action	Object	Tab Style	Description
Edit	Activities	Desk	Created to setup with student activity(junction object)
Edit	Attendees	Anytime	
Edit	Carecases	Check point	
Edit	Classifications	Joint	This tab is related to Hotel Reservation App
Edit	Events	Anytime	
Edit	Matrix	Phone	This tab is related to College Management System
Edit	Code_Details	Camera	
Edit	Codes	Desk	
Edit	Comments	Computer	
Edit	Endorsements	Desk	
Edit	Feedbacks	Highway Sign	This tab is related to Hotel Reservation App
Edit	Geographies	Highway Sign	This tab is related to Hotel Reservation App
Edit	Locations	Anytime	
Edit	Persons	Standard	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

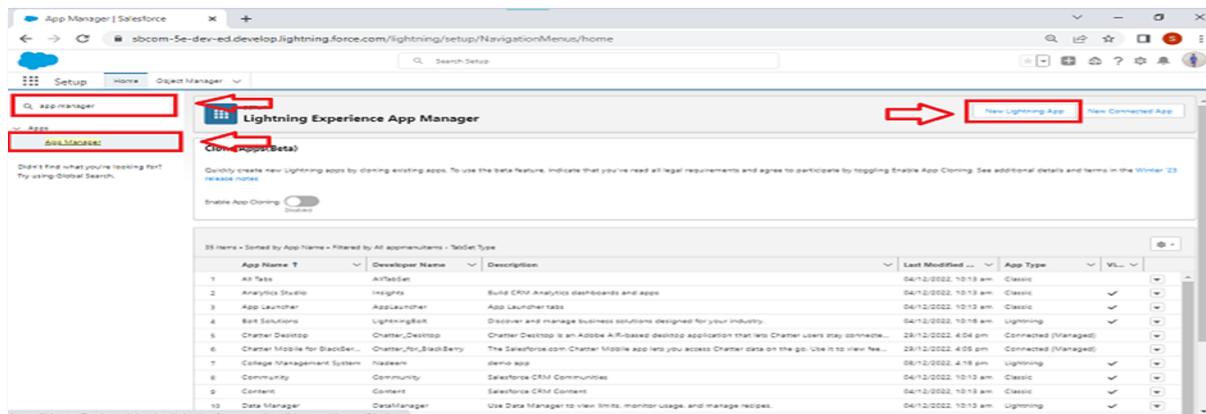
Creating Remaining Tabs

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 above activity.

Creating 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.



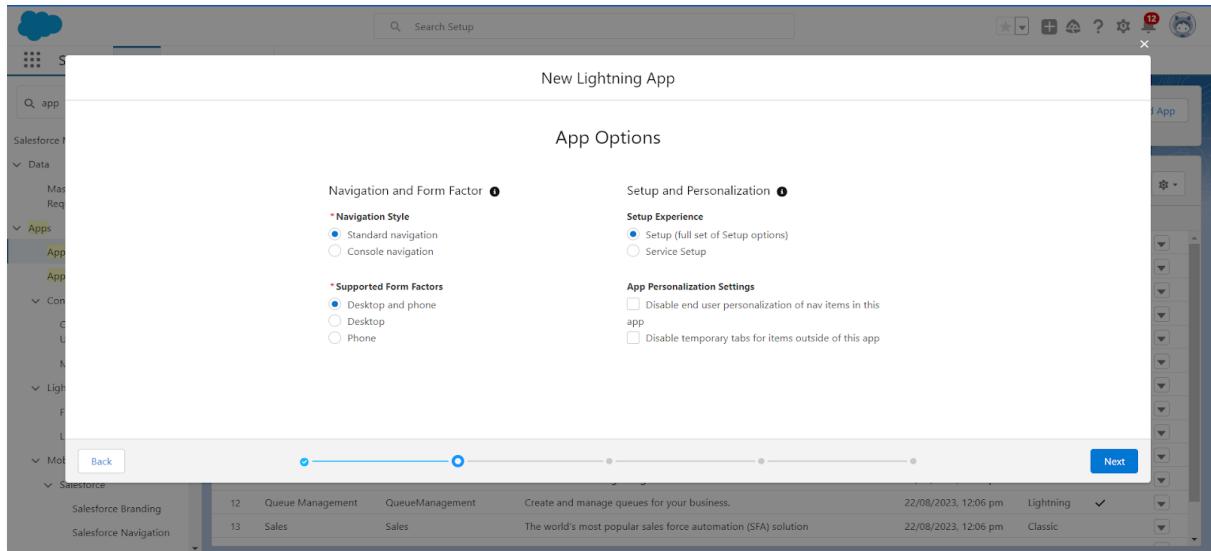
2. Fill the app name in app details and branding as follow

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.



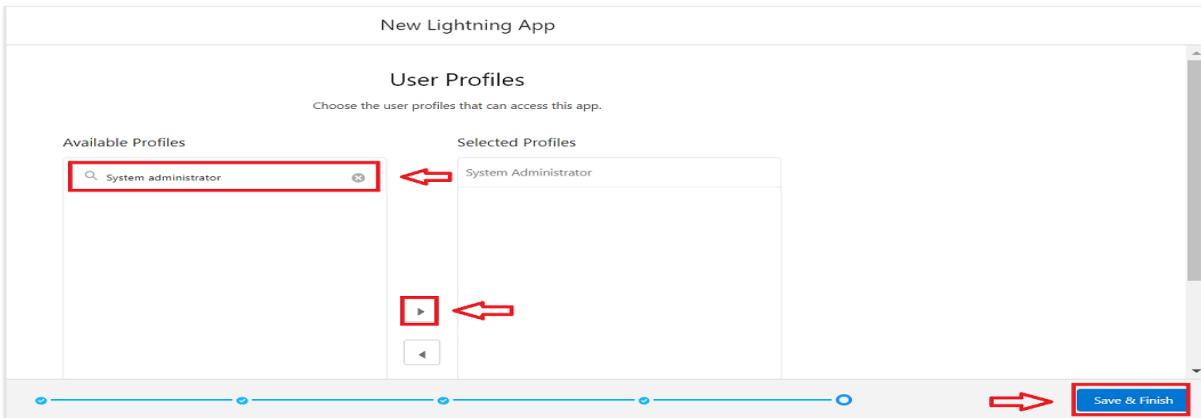
4. (Utility Items) keep it as default >> Next.

5. To Add Navigation Items:

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.

4. What are Fields?

Fields:

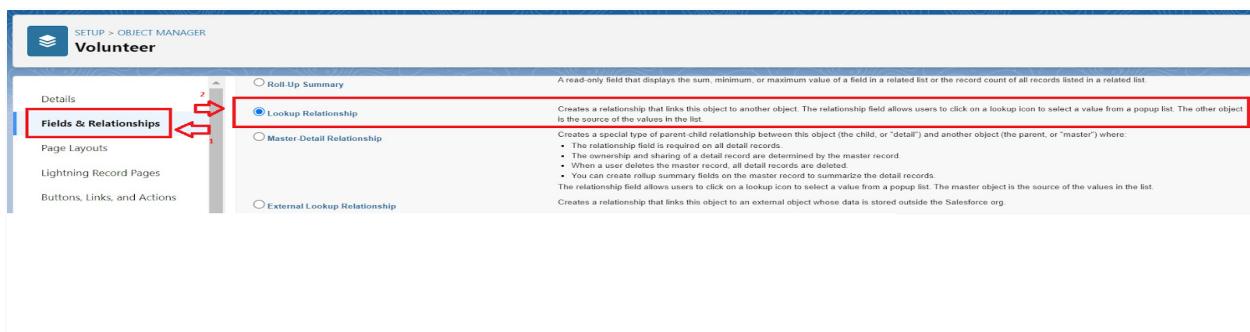
- Fields are data columns within an object, similar to columns in a database table.

They hold specific pieces of information related to the records of the object.

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 Master Detail relationship
4. Select the related object “Drop-Off point” and click next.

Step 2. Choose the related object

Select the other object to which this object is related.

Related To 1

Step 2

Previous Next Cancel 2

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 “Drop-Off Point” 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
Select the related object “Venue” and click next.
- 32.**Field Name : Sponsored By
- 33.**Field label : Auto generated
- 34.**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.

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.

Creation of fields for the Drop-Off point object

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:

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 “Formula” and Click on Next
4. 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.

The screenshot shows the 'Formula Options' dialog box. At the top, 'Formula Return Type' is set to 'Number' and 'Decimal Places' is set to 4. Below that, there's a text area with placeholder text: 'Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.' It also includes an example: 'Fahrenheit = 1.8 * Celsius + 32' and a link to 'More Examples'. There are tabs for 'Simple Formula' and 'Advanced Formula', and buttons for 'Insert Field' and 'Insert Operator'. The formula 'distance calculation (Number)' and 'DISTANCE(Location_2__c , Venue__r.Location__c , 'km')' are entered into the formula field, with the entire formula being highlighted by a red box.

To create another fields in an object:

5. Go to setup >> click on Object Manager >> type object name(Drop-Off point) in search bar >> click on the object.
6. Now click on “Fields & Relationships” >> New
7. Select Data type as a “Picklist” and Click on Next
8. 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:

9. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.

10. Now click on “Fields & Relationships” >> New

11. Select Data type as a “Number” and Click on Next

12. 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.

Creation of fields for the Task object

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:

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 “Date” and Click on Next
4. 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:

5. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
6. Now click on “Fields & Relationships” >> New
7. Select Data type as a “Picklist (Multi-Select)” and Click on Next
8. 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:

9. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
10. Now click on “Fields & Relationships” >> New
11. Select Data type as a “Number” and Click on Next
12. 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:

13. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
14. Now click on “Fields & Relationships” >> New
15. Select Data type as a “Text” and Click on Next
16. Fill the Above as following:
 - Field Label : Name of the Person
 - Field Name : Name_of_the_Person
 - 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(Task) in search bar >> click on the object.
18. Now click on “Fields & Relationships” >> New
19. Select Data type as a “Phone” and Click on Next
20. 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:

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 “Pick List” and Click on Next
24. 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:

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 “Long Text Area” and Click on Next

28. Fill the Above as following:

- Field Label : Feedback
- Field Name : Feedback
- Click on Next >> Next >> Save and new.

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
- 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:

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 “Picklist” and Click on Next
4. 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:

5. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
6. Now click on “Fields & Relationships” >> New
7. Select Data type as a “Date” and Click on Next
8. 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:

9. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
10. Now click on “Fields & Relationships” >> New
11. Select Data type as a “Number” and Click on Next
12. 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:

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

14. Now click on “Fields & Relationships” >> New

15. Select Data type as a “Email” and Click on Next

16. 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:

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

18. Now click on “Fields & Relationships” >> New

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

20. 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:

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

22. Now click on “Fields & Relationships” >> New

23. Select Data type as a “Text Area (Long)” and Click on Next

24. 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:

25. Go to setup >> click on Object Manager >> type object name(Volunteer)

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 of Birth
- Field Name : Date_of_Birth
- Click on Next >> Next >> Save and new.

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

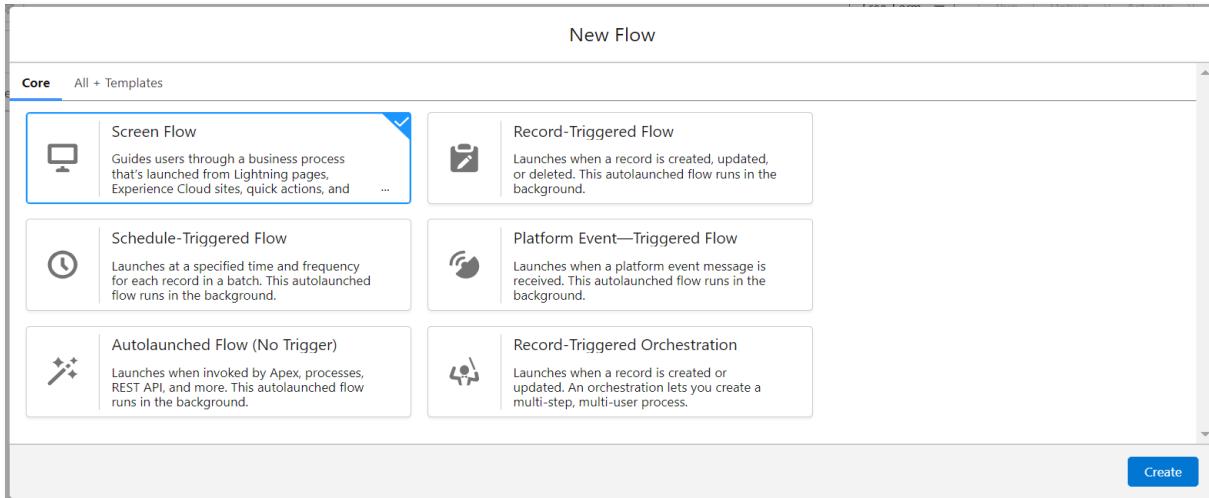
5. What are Flows? Create Flow to Create a Record in Venue Object

Flows:

• Flows in Salesforce are automation tools that can collect data and perform actions in Salesforce. Flows can be used to automate complex business processes by using a point-and-click interface.

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.



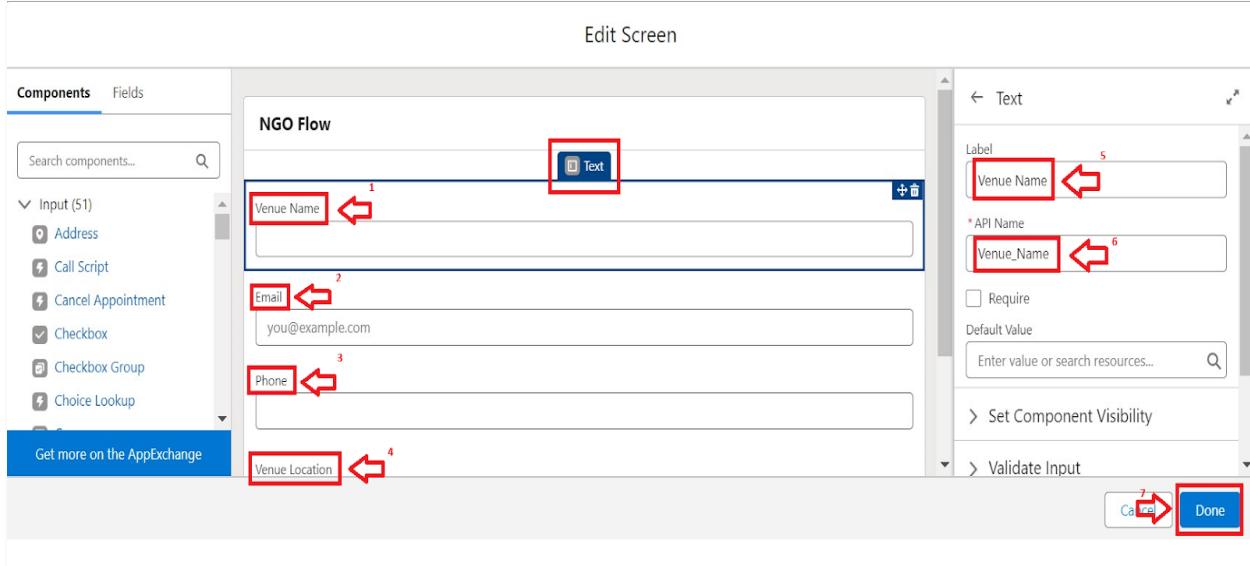
3. Click on the '+' icon in between start and end, and click on screen element.
4. Under the Screen Properties:
Label : Venue Details
API Name : Venue_Details
5. Now lets add components in this flow. Click on Text Component and name it as:
Label : Venue Name
API Name : Venue_Name
6. Click on Email Component 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}

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:

Create a Record of This Object

Object
Venue

Set Field Values for the Venue

Field	Value
Contact_Email__c	Aa Contact_Email > Value X
Contact_Phone__c	Aa Contact_Phone > Value X
Name	Aa Venue_Name X
Venue_Location__c	Aa location X

15. Click on Save as:

Flow Label : Venue Form

Flow API Name : Venue_Form

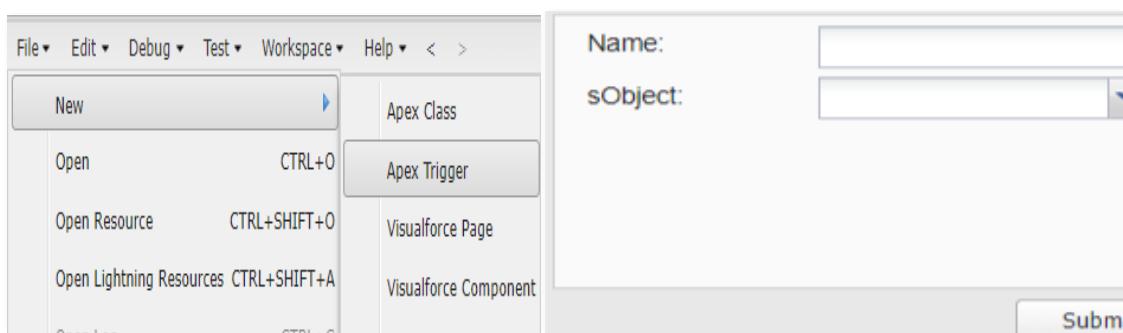
6. What is a Trigger? Create a Trigger, Trigger Code

Trigger:

- A trigger is an Apex script that executes before or after specified database events, such as insert, update, or delete.

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.

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;  
    }  
}
```

7. What are Profiles and Creation of Users

Profiles:

- Profiles in Salesforce define a user's permissions to perform different functions within Salesforce. Profiles control access to objects, fields, and various functionalities.

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 Then click on Save.

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 : mahafoundation@mk.com (give the username different)
Nickname : Auto Populated
User License : Salesforce Platform
Profile : NGOs Profile
Active : Check

3. Click on Save

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.

	Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit	Allu_Deepak-Foundation	Deepak	deepak@lendi.com		<input checked="" type="checkbox"/>	NGOs Profile
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty.00ddm00009rrwouao.j8uaexn4i0m@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit	Ganta_Kirthika Mahalaxmi	KGant	mahalaxmi@lendi.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit	Ganta_Komali Foundation	Komali	komalifoundation@mk.com		<input checked="" type="checkbox"/>	NGOs Profile
<input type="checkbox"/>	Edit	Sujatha_Sujatha-Foundation	sujatha	sujatha@gmail.com		<input checked="" type="checkbox"/>	NGOs Profile

8. What are Public Groups and Creation of Public Groups

Public Groups:

- Public Groups are collections of users that can be used to simplify the sharing of records, access permissions, and reporting within Salesforce

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

3. In Search, Select Users.
4. In Selected Members Add Iksha Foundation and System Administrator

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.

The screenshot shows the Salesforce 'Public Groups' page. At the top, there's a header with a user icon, 'SETUP', and 'Public Groups'. Below the header, the page title is 'Public Groups'. A sub-header explains that a public group is a set of users. There are buttons for 'View: All' (selected), 'Edit', and 'Create New View'. A help link 'Help for this Page' is at the top right. The main area has a table with columns: Action, Label +, Group Name, Created By, and Created Date. The table contains three rows:

Action	Label +	Group Name	Created By	Created Date
Edit Del	Deepak	Deepak	Ganta_Kirthika Mahalaxmi	07/08/2024, 5:13 pm
Edit Del	Komali	Komali	Ganta_Kirthika Mahalaxmi	07/08/2024, 5:12 pm
Edit Del	Sujatha	Sujatha	Ganta_Kirthika Mahalaxmi	07/08/2024, 5:14 pm

9. What are Report Types and Creation of Report Type

Report Types:

- **Report Types** in Salesforce define the objects and fields that are available for use in reports. Custom report types can be created to combine data from different objects.

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.

10. Report Creation

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.
8. Now click on Save & Run.
9. Give Label as :
10. Report Name : venue and Drop Off point
11. Report Unique Name : Auto Populated
12. 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.
 7. Now click on Save & Run.
 8. 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.

11. What are Dashboards?

Dashboards:

- Dashboards in Salesforce are visual representations of reports, allowing users to monitor key metrics and performance indicators at a glance.

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". On the left, there are sections for "Report" (set to "venue and Drop Off point"), "Display As" (with various chart icons), "Groups" (with an "Add group..." button), and "Columns" (with a delete icon). On the right, the "Preview" section 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	-	-

At the bottom of the preview is a link: "View Report (venue and Drop Off point)".

1. Now click on save.

Adding Volunteer Task Report to the Dashboard

1. Click on Widget and select Chart or Table
2. In Select Report : Select Volunteer Task Report.
3. Then click on select
4. 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". On the left, there are sections for "Report" (set to "Volunteer Task"), "Display As" (with various chart icons), "X-Axis" (set to "Volunteer ID"), and "Y-Axis" (set to "Record Count"). On the right, the "Preview" section displays a line chart with two data points at (1, 1) and (2, 1). The Y-axis is labeled "Record Count" with values 0, 0.5, and 1. The X-axis is labeled "Volunteer ID" with values 4 and 2.

At the bottom of the preview is a link: "View Report (Volunteer Task)".

1. Now click on save.

Adding a Picture to the Dashboard (Optional)

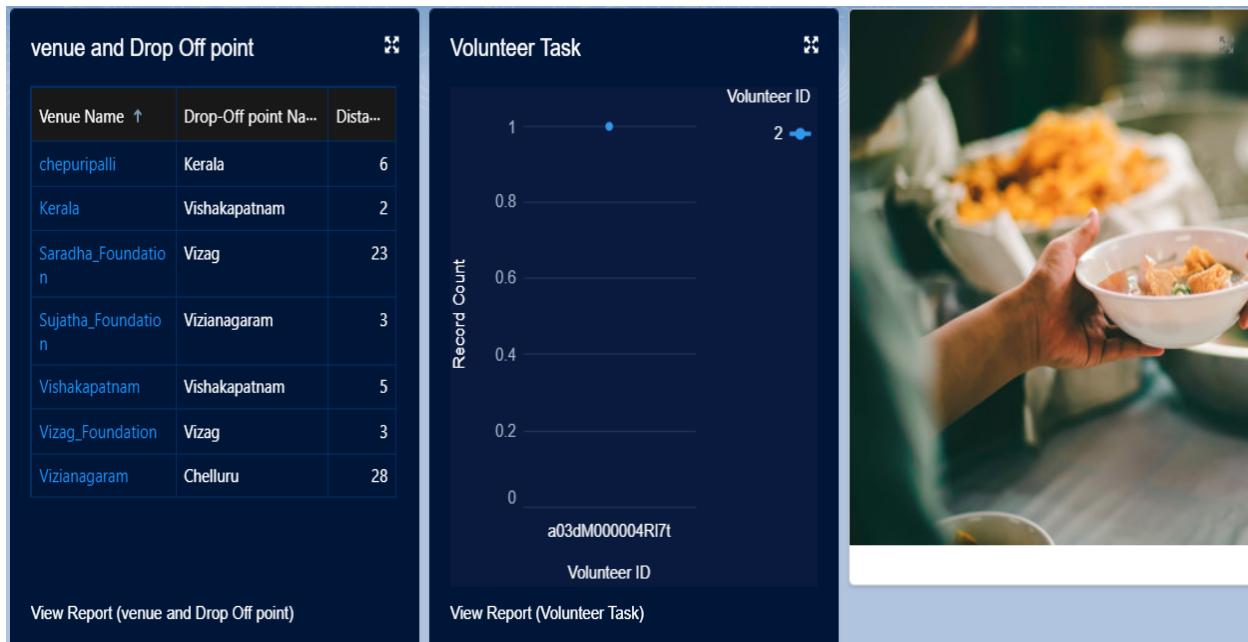
(Note : To upload an image into the Dashboard, we have to first download an image from google or other sources into your system)

1. Click on Widget and select Image. Then click on Browse Files.
2. Then Select the Picture you want to upload in this Dashboard.
3. Then click on Save As :

Name : Task Execution Details

Click on Select Folder and select Custom Dashboards

4. Click on Select Folder and then Save.



12. What are Sharing Rules? Creation of Sharing Rules

Sharing Rules:

- Sharing Rules in Salesforce are used to extend the sharing access granted to users. They allow you to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

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 GREATER THAN 15) AND (Drop-Off Point: Distance LESS THAN 30)			Group: Deepak	ReadWrite
Edit Del	Drop-Off Point: Distance LESS THAN 15			Group: Komali	ReadWrite
Edit Del	(Drop-Off Point: Distance GREATER THAN 30) AND (Drop-Off Point: Distance LESS OR EQUAL 50)			Group: Sujatha	ReadWrite

13. Home Page and Creation of Home Page

Home Page:

- The Home Page in Salesforce is a customizable page that provides users with an overview of their tasks, calendar events, and other important information.

Creation of Home Page

- Go to setup >> type Lightning App Builder in quick find box >> Click on the Lightning App Builder and Select the New.
- Select Home Page and give Label as HOME Page.
- Select Standard Home Page.
- Near Components search for Flow and Drag and Drop in Right Side Section..
- On the right hand side:
Flow : Venue Flow
- Near Components search for Dashboard, then Drag and Drop it in first Section.
- Click on Save and Activation, then click on App Default, then Add Assignments.
- Add FoodConnect App and then Save.
- FoodConnect Home Page would Look Like this.

The screenshot shows the FoodConnect Task Execution Details dashboard. At the top, there's a search bar and a navigation menu with links like Home, Venues, Drop-Off Points, Execution Details, Tasks, Volunteers, Reports, and Dashboards. Below the menu, a header bar displays "Task Execution Details" and the date "As of 18-Aug-2024, 7:56 pm Viewing as Kirthika Mahalaxmi Ganta".

venue and Drop Off point:

Venue Name	Drop-Off point Na...	Dista...
cheppuripalli	Kerala	6
Kerala	Vishakapatnam	2
Saradha_Foundatio...	Vizag	23
Sujatha_Foundatio...	Vizianagaram	3
Vishakapatnam	Vishakapatnam	5
Vizag_Foundation	Vizag	3
Vizianagaram	Chelluru	28

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

Volunteer Task:

Volunteer ID: a03dm000004Ri7I
Record Count: 2

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

Venue Form:

Venue Name:
 Email: name@example.com
 Phone:
 Venue Location:
 longitude:
 Latitude:
 Distance:
 Volunteer Name:

[Next](#)

Conclusion:

By utilizing the Salesforce platform, the project successfully created a streamlined and transparent system for managing surplus food donations. With efficient coordination of volunteers and timely delivery to beneficiaries, the project effectively tackled food insecurity and maximized the use of available resources.