SALESFORCE DEVELOPER FOOD CONNECT

TO SUPPLY LEFT OVER FOOD TO POOR

Name : MOLLI SAI VAMSI

College: Gayatri Vidya Parishad College of Engineering (A), Visakhapatnam

Roll Number: 21131A05C4

Email: 21131a05c4@gvpce.ac.in

Overview

FoodConnect is a Salesforce-driven application designed to reduce food waste and support hunger relief efforts. By connecting food donors—such as restaurants, grocery stores, and suppliers—with non-profits and shelters, FoodConnect facilitates efficient surplus food redistribution to communities in need. The platform leverages automation and real-time tracking to optimize logistics and ensure transparency in the donation process.

Objectives

1. **Reduce Food Waste**: Significantly decrease the amount of surplus food discarded by restaurants, grocery stores, and food suppliers by redirecting it to communities in need.
2. **Enhance Social Impact**: Support hunger relief efforts by creating an efficient distribution network that connects food donors with recipient organizations.
3. **Increase Operational Efficiency**: Use Salesforce to streamline and automate food donation logistics, ensuring timely and accurate distribution.
4. **Promote Transparency and Accountability**: Provide visibility into the food donation process for stakeholders, from donation registration to delivery.

Specific Outcomes

1. **Real-Time Tracking of Donations**: Implement a live dashboard to monitor food donations from initial registration to delivery confirmation.
2. **Automated Matching System**: Establish a location-based matching algorithm that pairs donors with nearby shelters or non-profits based on food type and urgency.
3. **Customizable Alerts and Notifications**: Send automated alerts to field agents and recipient organizations regarding new donations, pickup times, and delivery statuses.
4. **Mobile-Enabled Delivery Management**: Equip field agents with mobile access for status updates and tracking deliveries, enhancing logistical precision and real-time reporting.
5. **Comprehensive Donor and Recipient Management**: Use Salesforce CRM capabilities to maintain records of all donors and recipients, fostering a sustainable food redistribution network.

Salesforce Key Features and Concepts Utilized

What is Salesforce?

Salesforce is a leading cloud-based Customer Relationship Management (CRM) platform that supports businesses in managing sales, customer service, and marketing. It provides tools for automation, analytics, and customer en gagement, along with extensive customization through its AppExchange marketplace and a wide range of integration options. Salesforce's scalability and flexibility make it suitable for companies of all sizes and industries.

Salesforce Concepts Applied

1. **Custom and Standard Objects**
   - **Custom Objects**: Created for entities like Donors, Drop-Off Points, Volunteers, and Venues to organize data essential for managing food donations, tracking drop-off points, and coordinating volunteers.
   - **Standard Objects**: Leveraged Accounts and Contacts to manage relationships with donors and recipient organizations, ensuring data consistency and accessibility.
2. **Fields and Data Management**
   - **Custom Fields**: Added to track specifics, such as food category, donation quantity, task ID, volunteer availability, and location details for easy access and organization.
   - **Data Tracking**: Ensures efficient logging and retrieval of information, supporting real-time updates and streamlined reporting.
3. **Flows**
   - Automated workflows (Flows) guide users through processes like registering new donations, alerting volunteers, and scheduling tasks, reducing manual effort and enhancing efficiency.
4. **Triggers**
   - **Apex Triggers**: Automate actions on record changes, such as updating inventory counts and notifying field agents, which improves response times and data accuracy.

5. **Profiles and Permissions**
    - Defined profiles and user roles to control access levels, ensuring data privacy and security, and allowing users to interact only with relevant data.
6. **Public Groups and Sharing Rules**
    - **Public Groups and Sharing Rules**: Facilitate collaborative access among users, with groups like volunteer networks and donor partners established for streamlined coordination.
7. **Reports and Dashboards**
    - **Custom Reports and Dashboards**: Provide visual insights into donation status, volunteer activity, and delivery metrics, with real-time analytics for project monitoring and impact evaluation.
8. **Mobile Integration**
    - Mobile device compatibility allows field agents to access and update data remotely, improving logistics management and real-time updates.
9. **Lightning App and Custom Tabs**
    - Custom Lightning App and tabs for easy navigation between key objects, such as Donation Status, Task Tracking, and Volunteer Management, providing a user-friendly experience.
10. **Dashboards for Key Performance Indicators (KPIs)**

- Dashboards display critical metrics on food distribution, volunteer engagement, and donor contributions, giving stakeholders an overview of project performance and impact.

Creating a Salesforce Developer Account

Instructions

- **Go to the following website:***https://developer.salesforce.com/signup*.
- **Fill out the sign-up form** with the information below.

Required Information

Field	Description
First Name & Last Name	Your full name
Email	Your email address
Role	Developer
Company	College or Company Name
Country	India
Postal Code	Your postal code
Username	A combination of your name and company, in the formatusername@organization.com. This does not need to be a real email address.

Account Activation

- **Check your email** for a verification message.
- **Follow the link** in the email to activate your account.
- *Activation may take 5-10 minutes*.

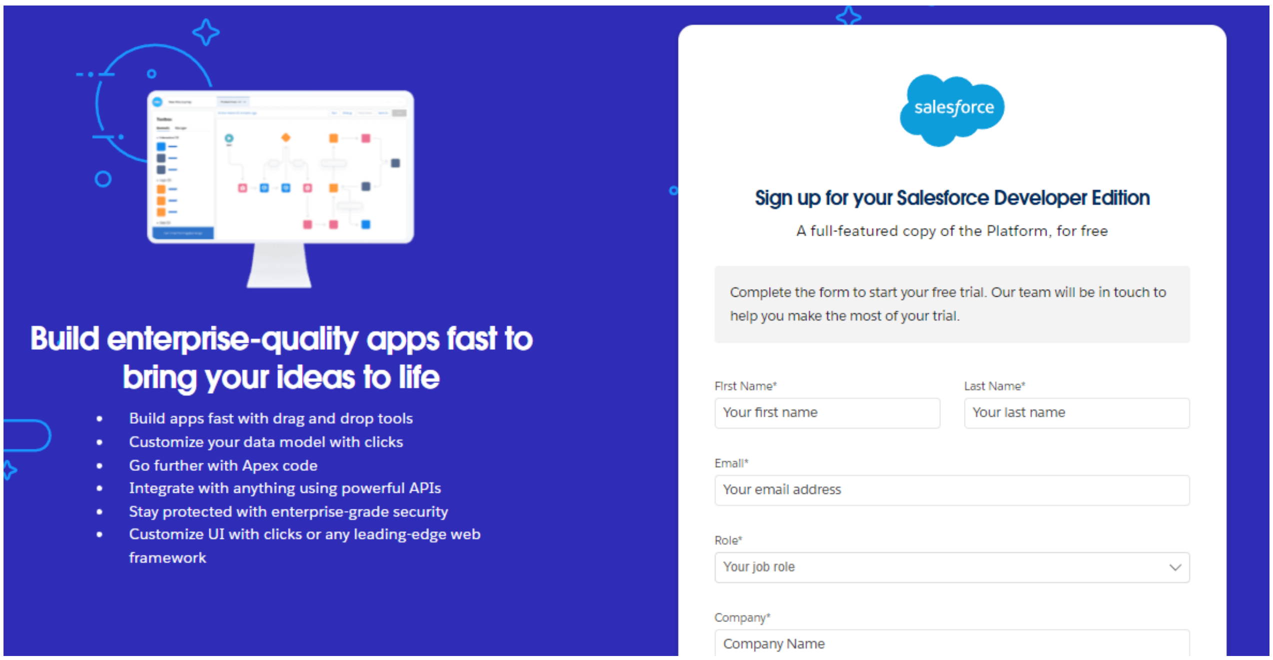
Salesforce Account Setup

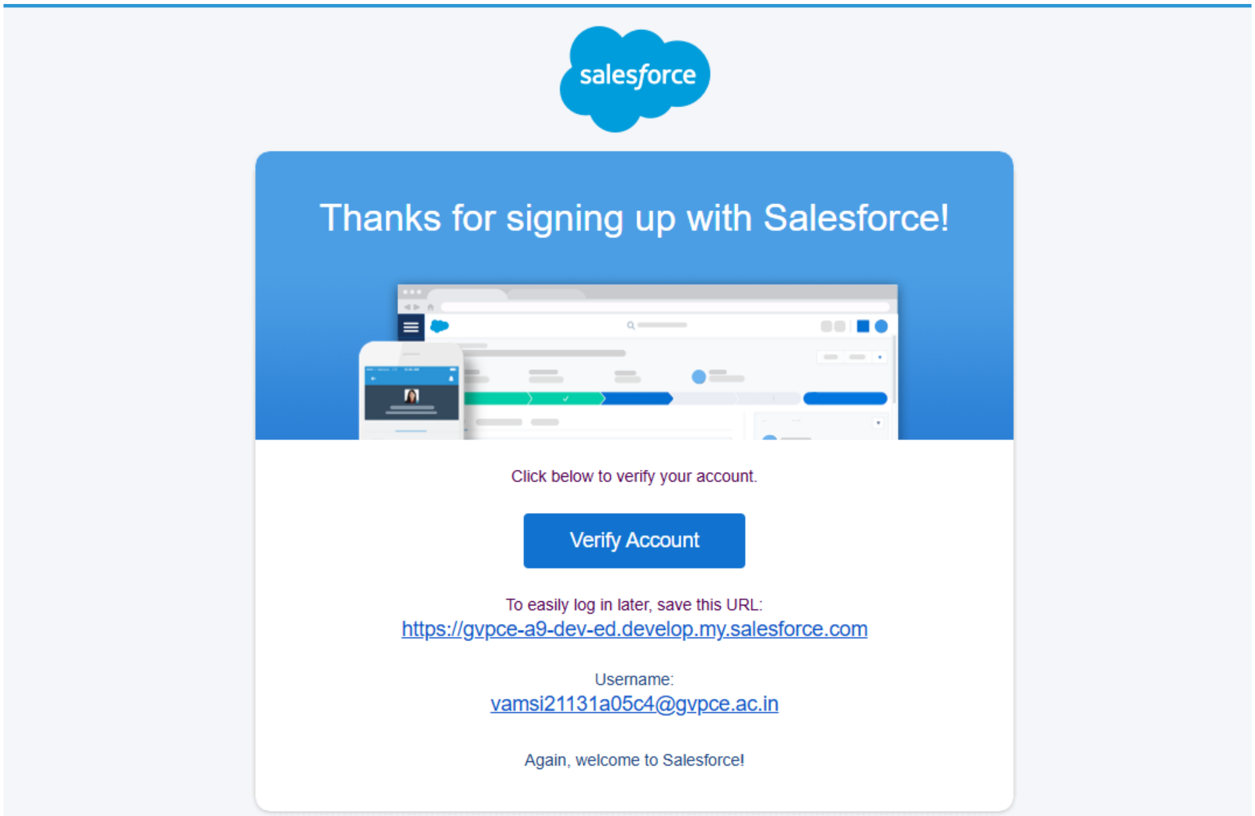
Instructions

This document provides instructions for changing your Salesforce password.

Steps

- **Step 1:** Click on **Verify Account**.
- **Step 2:** Provide a new password meeting the following criteria:*At least***8 characters**.*At least***1 letter**.*At least***1 number**.
- **Step 3:** Answer the security question.
- **Step 4:** Click **Change Password**.
- **Result:** You will be redirected to your Salesforce setup page.





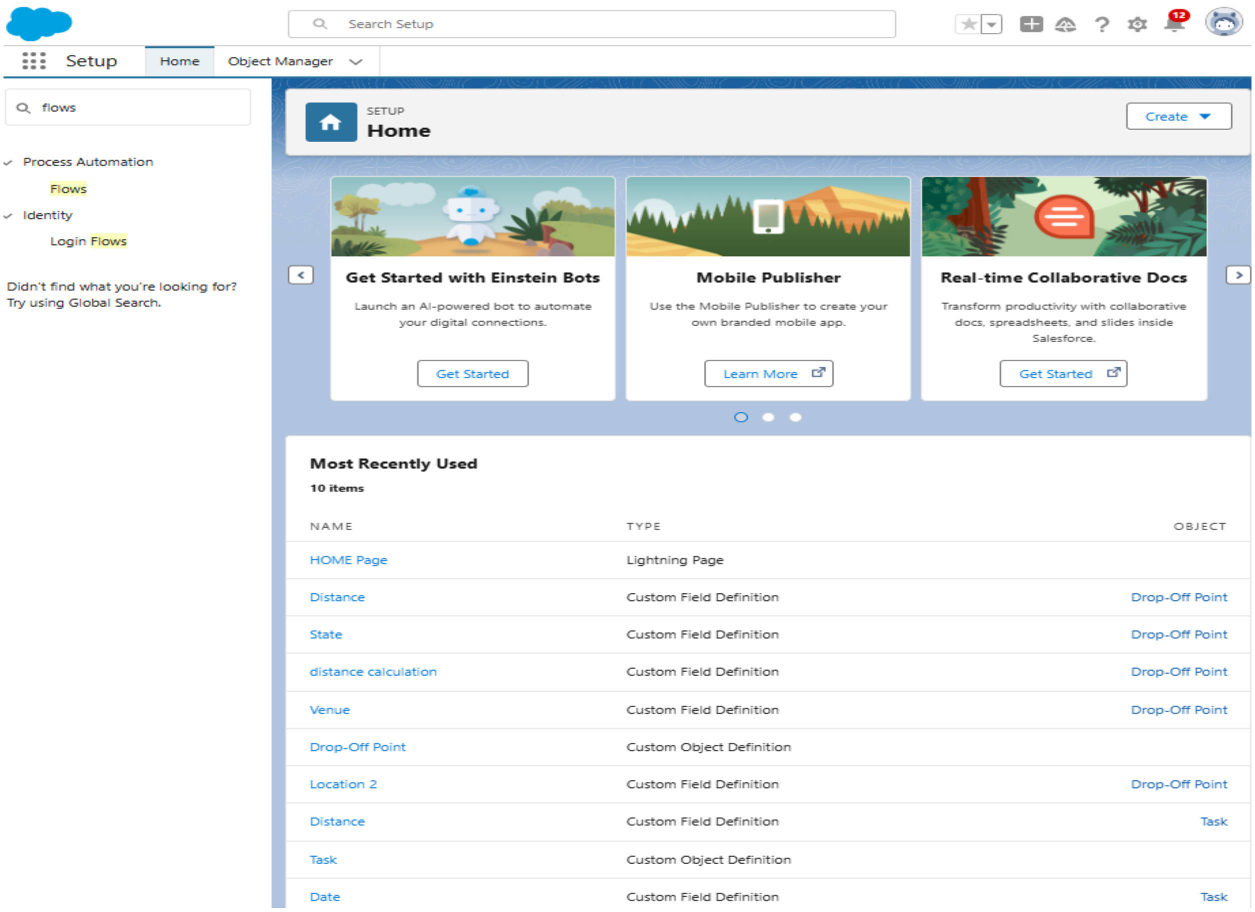
Salesforce Setup Instructions

Navigating to Setup

- To reach the Setup page, click on **Setup** in the top navigation bar.

Creating an Object

- To create a new object:From the Setup page, click on **Object Manager**.Click on **Create**.Select **Custom Object**.



Custom Object Definition

Defining the Object

- **Label Name:** Enter the singular label name.
- **Plural Label Name:** Enter the plural label name.
- **Features:** Click on **Allow reports** and **Allow search**.

Creating Custom Objects

Instructions for Creating "Venue" Object

- **Steps to create a Venue object:**Navigate to the setup page.Click on *Object Manager*.Click on *Create*.Click on *Custom Object*.Enter the label name as **Venue**.Enter the plural label name as **Venues**.Set the record name as **Venue Name**.Choose **Text** as the data type.Click on *Allow reports* and *Track Field History*, *Allow Activities*.Enable *Allow Search*.Click *Save*.

Instructions for Creating "Drop-Off Point" Object

- **Steps to create a Drop-Off Point object:**Navigate to the setup page.Click on *Object Manager*.Click on *Create*.Click on *Custom Object*.Enter the label name as **Drop-Off Point**.Enter the plural label name as **Drop-Off Points**.Specify the record name.Click *Save*.

Creating Objects in a System

This document outlines steps for creating different types of objects within a system.

Creating a Task Object

- **To create a task object:**Navigate to the *setup page* and select *Object Manager*.Click *Create* and choose *Custom Object*.Enter the label name as **Task**.Enter the plural label name as **Tasks**.Set the *Record Name* to **Task Name**.Set the *Data Type* to **Text**.Click *Allow* reports, *Track Field History*, and *Allow Activities*.Click *Save*.

Creating a Volunteer Object

- **To create a volunteer object:**Navigate to the *setup page* and select *Object Manager*.Click *Create* and choose *Custom Object*.Enter the label name as **Volunteer**.Enter the plural label name as **Volunteers**.Set the *Record Name* to **Volunteer Name**.Set the *Data Type* to **Text**.Click *Allow* reports, *Track Field History*, and *Allow Activities*.Click *Save*.

Creating an Execution Details Object

- **To create an execution details object:** *Instructions for creating this object are provided*.

Note: The document uses a format of instructions with step numbers and arrows (>>) to indicate navigation or actions. The document also references allowing reports, field history, and activities, which likely relate to system features.

Most Recently Used

10 items

NAME	TYPE	OBJECT
HOME Page	Lightning Page	
Distance	Custom Field Definition	Drop-Off Point
State	Custom Field Definition	Drop-Off Point
distance calculation	Custom Field Definition	Drop-Off Point
Venue	Custom Field Definition	Drop-Off Point
Drop-Off Point	Custom Object Definition	
Location 2	Custom Field Definition	Drop-Off Point
Distance	Custom Field Definition	Task
Task	Custom Object Definition	
Date	Custom Field Definition	Task

Creating a Custom Tab

Steps

- **Select Object:** Choose the object (e.g., Venue).
- **Choose Tab Style:** Select the desired tab style.
- **Add to Profiles:** Add the tab to profiles. This is the default setting.
- **Add to Custom App:** Add the tab to a custom app.
- **Include Tab:** Remove the checkmark from the *include tab* option.
- **Personal Customizations:** Ensure the *Append tab to users' existing personal customizations* option is checked.
- **Save:** Click the Save button.

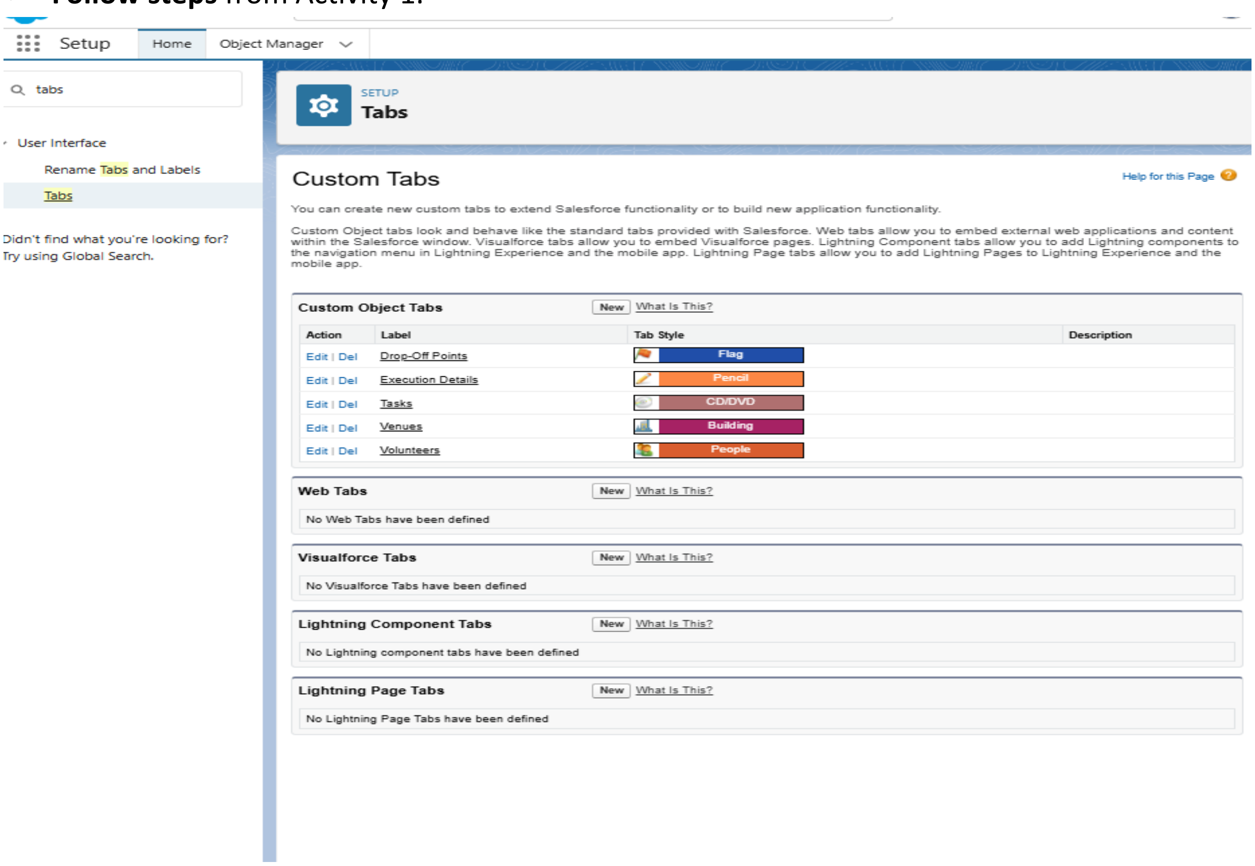
Creating a Tab

- **Find Tabs:** Go to the setup page and search for "Tabs" in the Quick Find bar.
- **Create New Tab:** Click on the "New" option, specifically under the "Custom object" tab.
- **Object Name:** Enter the label name for the tab.
- **Plural Label:** Enter the plural label.
- **Record Name/Format:** Enter the record name and format. (e.g., Execution Detail Name)
- **Data Type:** Set the data type (e.g., Text).
- **Permissions:** Click on *Allow reports* and *Track Field History*, and *Allow Activities*.
- **Search:** Allow search functionality.
- **Save:** Click the save button.

Creating Remaining Tabs

Instructions

- **Create tabs** for remaining objects (*Drop-Off Point, Task, Volunteer, Execution Details*).
- **Follow steps** from Activity 1.



Create a Lightning App

Instructions

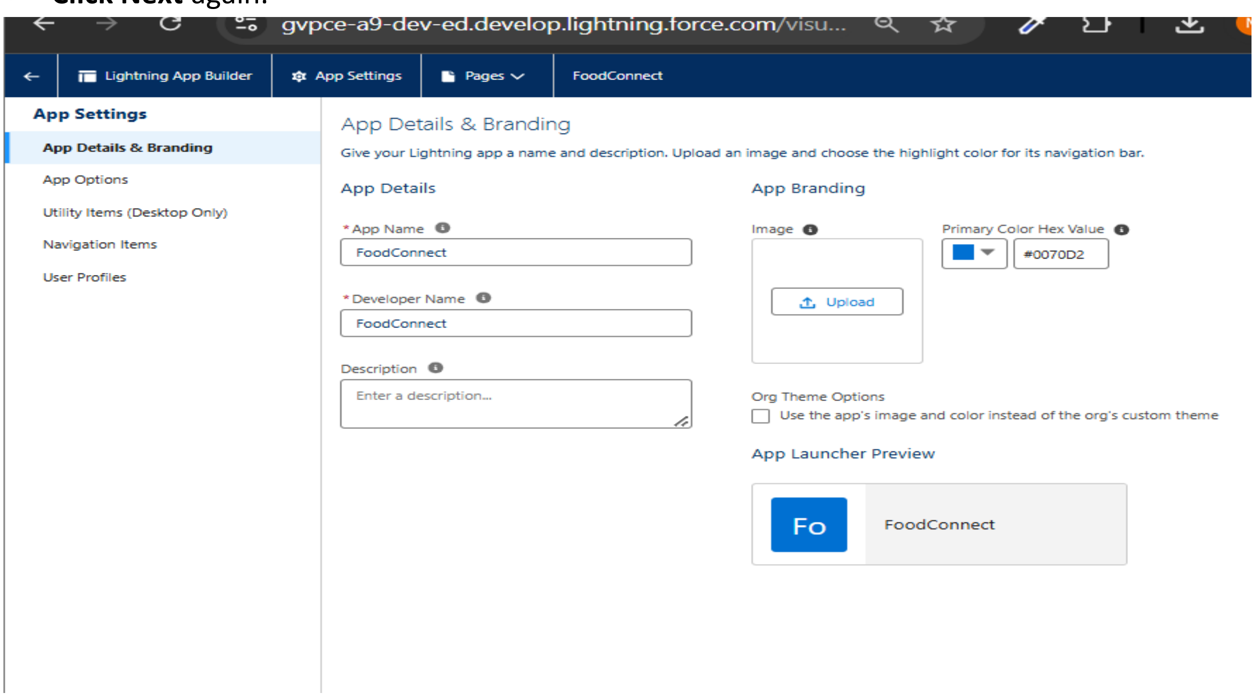
- **Go to setup page**.
- **Search** for *app manager* in quick find.
- **Select app manager**.
- **Click on New Lightning App**.

App Details and Branding

- **App Name:***FoodConnect* (auto-populated).
- **Developer Name:***Auto-populated*.
- **Image:** Optional. If desired, upload an image. Otherwise, keep the default.
- **Primary color:** Use a hexadecimal color code (keep default).

Final Step

- **Click Next**.
- **Set Navigation Style** to *Standard* in the app options page.
- **Click Next** again.



New Lightning App Setup

App Options

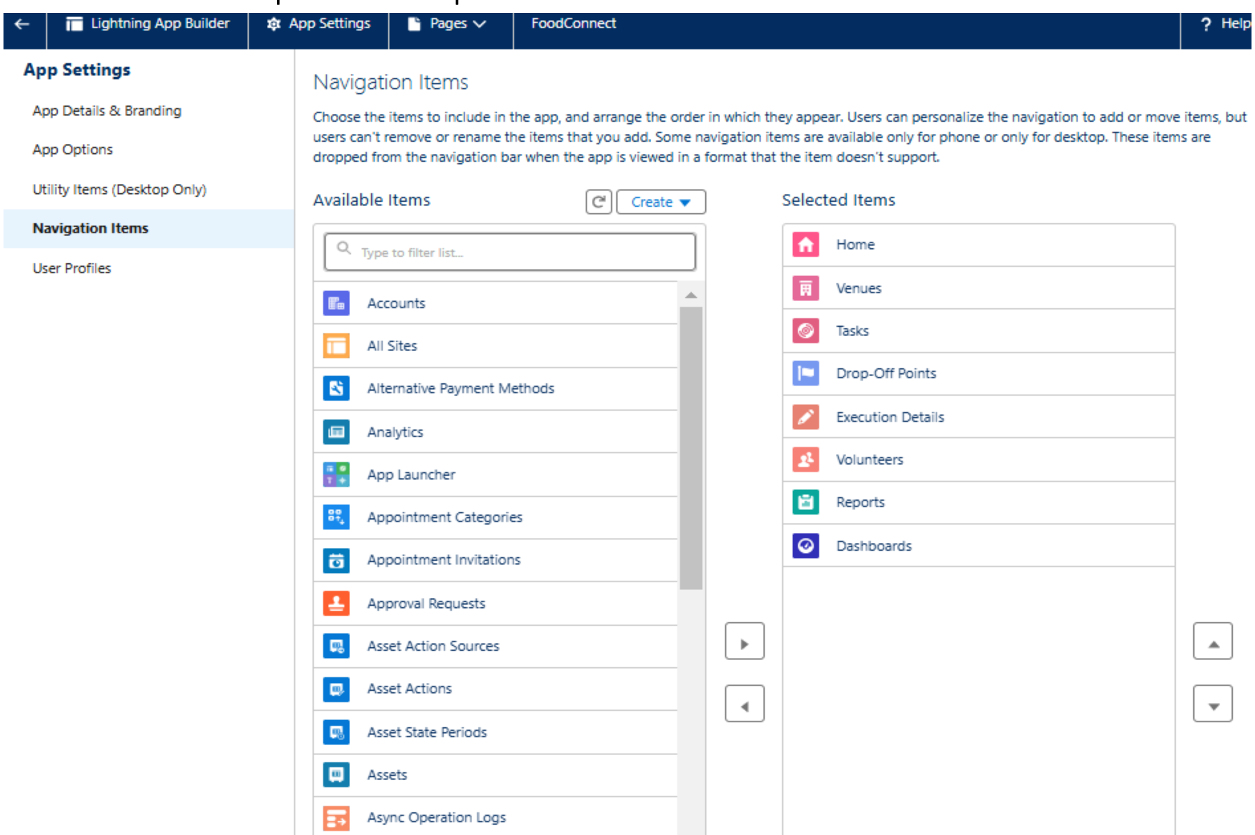
- Keep *default* navigation and form factors.
- Choose *setup* and *personalization* options.

Navigation Items

- **Available Items:** A list of items that can be added to the navigation.
- **Selected Items:** A list of items currently selected for navigation. Items include Home, Venues, Tasks, Drop-Off Points, Execution Details, Volunteers, Reports, and Dashboards.
- Use the search bar and arrow buttons to add or remove items.

Next Steps

- Move to the next step to add user profiles.



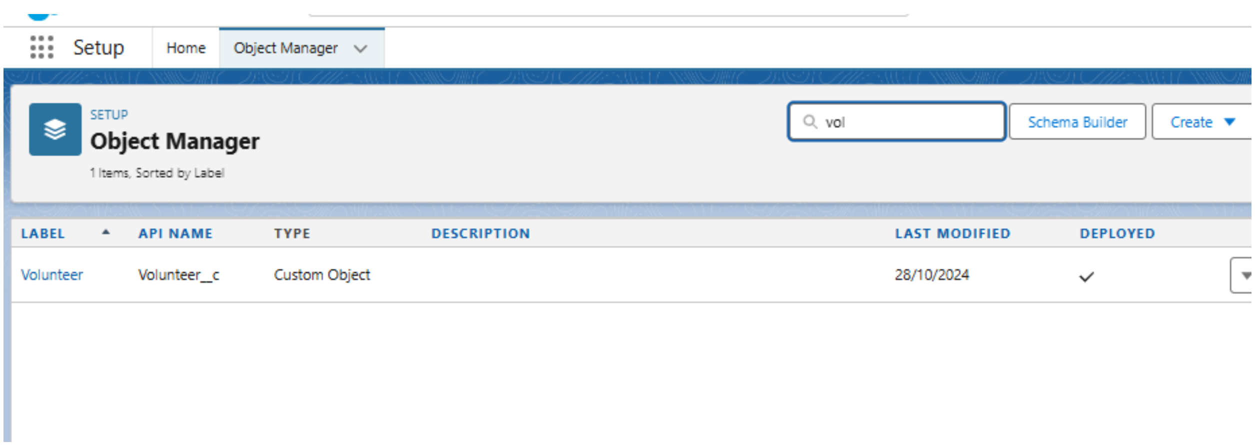
Creating Relationships in Salesforce

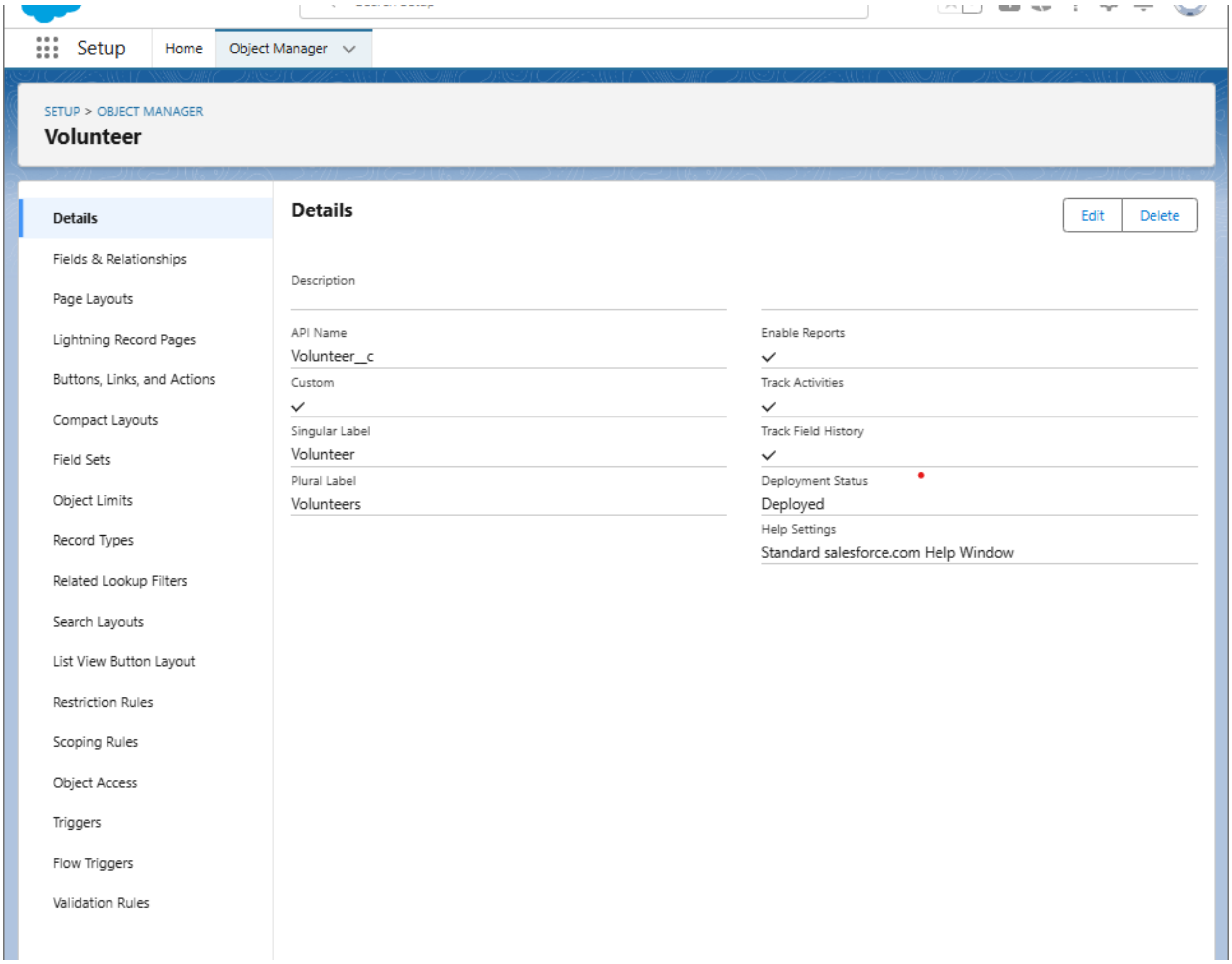
This document describes how to create relationships between objects in a Salesforce application.

Setting up a Lookup Relationship

- **Step 1:** Navigate to *Setup* > *Object Manager*.
- **Step 2:** Search for the *Volunteer* object.
- **Step 3:** Click on *Fields & Relationships* > *New*.
- **Step 4:** Select *Master Detail* relationship.
- **Step 5:** Choose the related object ("*Drop-Off point*").

Note: This process creates a relationship between a Volunteer *object and a* Drop-Off point *object.*





Setting Up Relationships in a System

This document describes steps for creating relationships between objects in a system. The process involves adding fields that link different data entries.

Creating a "Drop-Off Point" Relationship

- **Field Name:***Drop_Off_point*
- **Field Label:***Auto generated*
- **Next Steps:***Next >> Next >> Save*

Creating a "Volunteer" Relationship

- **Steps:**Access the *Object Manager* and search for *Execution Details*.Navigate to *Fields & Relationships* > *New*.Select *Master Detail Relationship*.Choose *Volunteer* as the related object.**Field Name:***Volunteer***Field Label:***Auto generated***Next Steps:***Next >> Next >> Save*

Creating a "Task" Relationship

- **Steps:**Access the *Object Manager* and search for *Execution Details*.Navigate to *Fields & Relationships* > *New*.Select *Master Detail Relationship*.Choose *Task* as the related object.**Field Name:***Task***Field Label:***Auto generated***Next Steps:***Next >> Next >> Save*

Creating Lookup Relationships

Instructions for Creating Lookup Relationships

This document provides instructions for creating lookup relationships in a system, likely a CRM or similar application. It details steps for associating fields with other objects.

Step-by-Step Instructions

- *Open***Object Manager**.
- *Find* the desired object.
- Navigate to **Fields & Relationships**.
- Select **New**.
- Choose **Lookup Relationship**.
- Select the **related object**.
- Enter the **field name** and **label**.
- Click **Next** twice and then **Save**.

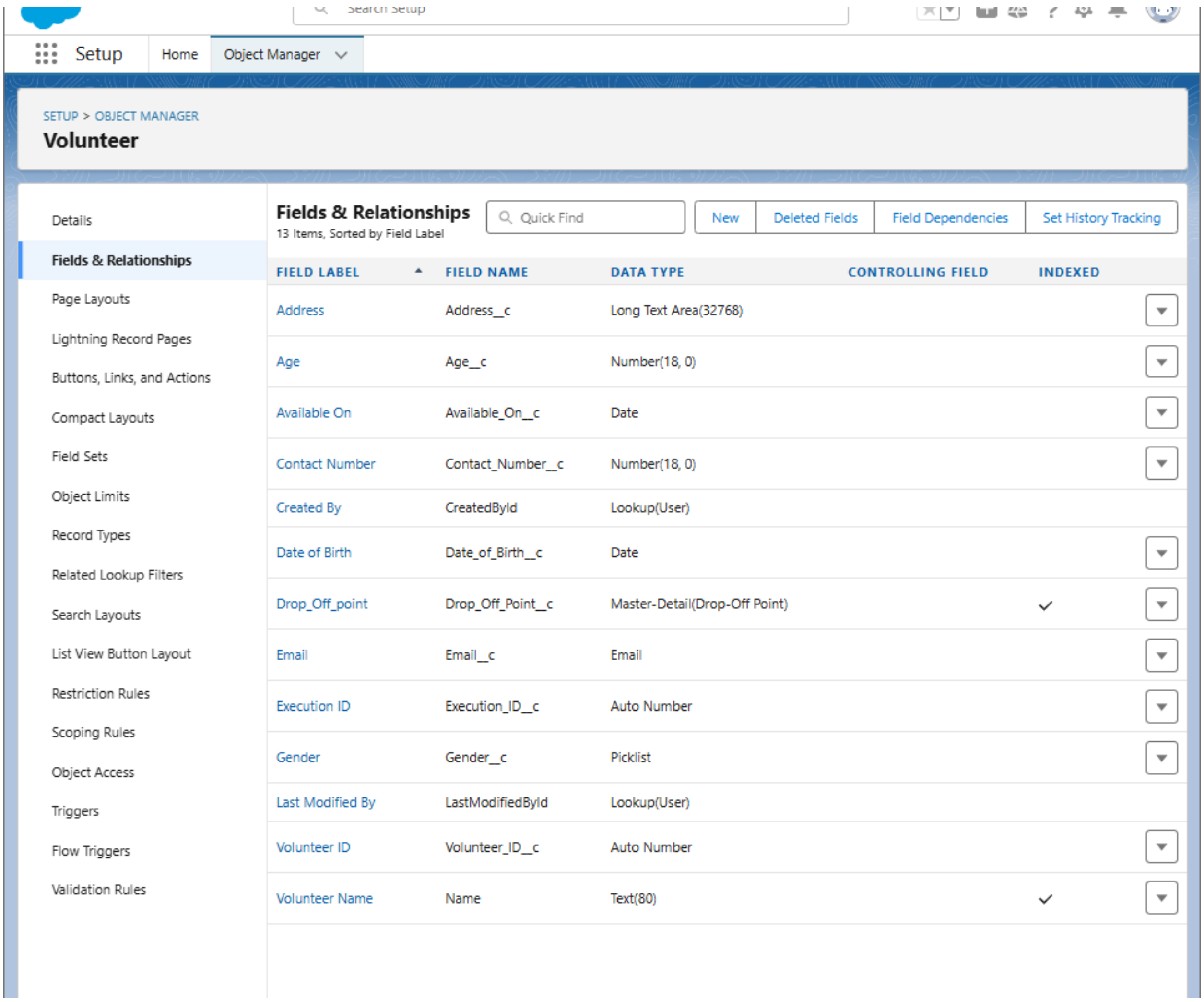
Specific Examples (Venue Object)

- **Related Object:***Drop-Off Point*
- **Field Name:***Venue*
- **Field Label:***Venue_c*
- **Related Object:***Venue*
- **Field Name:***Sponsored By*
- **Field Label:***Auto generated*
- **Related Object:***Drop-Off point*

- **Field Name:***Drop-Off point*
- **Field Label:***Auto generated*

Adding Fields to an Object

This document provides instructions for adding fields to an object, likely in a database or software application.



Adding an Email Field

- **Step 1:** Navigate to **Object Manager**.
- **Step 2:** Search for the object (e.g., "Venue").
- **Step 3:** Click on **Fields & Relationships** -> **New**.

- **Step 4:** Select **Data Type** as "Email".
- **Step 5:** Enter the following:**Field Label:***Contact Email***Field Name:***Contact Email*
- **Step 6:** Check the required box.
- **Step 7:** Click **Next** twice, then **Save and new**.

Adding a Phone Field

- **Step 1:** Navigate to **Object Manager**.
- **Step 2:** Search for the object (e.g., "Venue").
- **Step 3:** Click on **Fields & Relationships** -> **New**.
- **Step 4:** Select **Data Type** as "Phone".
- **Step 5:** Enter the following:**Field Label:***Contact Phone***Field Name:***Contact Phone*
- **Step 6:** Check the required box.
- **Step 7:** Click **Next** twice, then **Save and new**.

Adding a Geolocation Field

- **Step 1:** Navigate to **Object Manager**.
- **Step 2:** Search for the object (e.g., "Venue").
- **Step 3:** Click on **Fields & Relationships** -> **New**.
- **Step 4:** Select **Data Type** as "Geolocation".
- **Step 5:** Enter the following:**Field Label:***Location***Decimal Places:***4***Field Name:***Location***Description:***Enter the Geolocation of your Venue*

Step 6: Click **Next** twice, then **Save and new**.

Creating Fields in Objects

Venue Object

- To create a new field:Go to *Object Manager*.Type *Venue* in the search bar.Click on the object.Click on *Fields & Relationships*.Click *New*.Select *Long Text Area* as the data type.Fill in the following:**Field Label**: Venue Location**Field Name**: Venue_LocationClick *Next >> Next >> Save and new*.

Drop-Off Point Object

- To create a new field:Go to *Object Manager*.Type *Drop-Off point* in the search bar.Click on the object.Click on *Fields & Relationships*.Click *New*.Select *Geolocation* as the data type.Fill in the 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**: 4Click *Next >> Next >> Save and new*.

Creating Fields in a Document

Creating a Formula Field

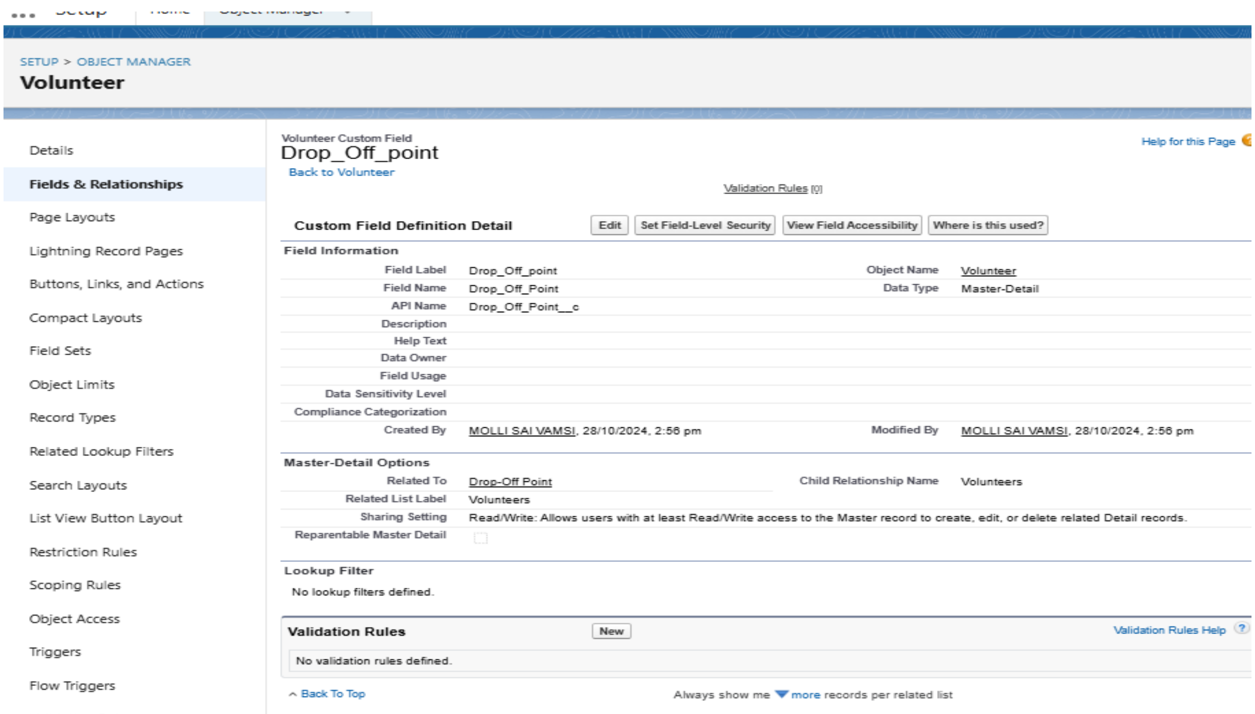
- **Data Type:***Formula*
- **Label:***distance calculation*
- **Name:***distance_calculation*
- **Return Type:***Number*
- **Formula:***DISTANCE(Location_2_c, Venue_r.Location_c, 'km')*
- **Action:***Click Next >> Next >> Save and new.*

Creating a Picklist Field

- **Data Type:***Picklist*
- **Label:***State*
- **Name:***State*
- **Values:***Enter values, with each value separated by a new line:Andhra Pradesh*

Creating Additional Fields

- **Navigate:***Go to setup >> click on Object Manager >> type object name (Drop-Off point) in search bar >> click on the object.*
- **Create New Field:***Now click on "Fields & Relationships" >> New*



Indian States and Territories

This document lists the states and union territories of India.

States

- **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**

Union Territories

- **Andaman & Nicobar (UT)**
- **Chandigarh (UT)**
- **Dadra & Nagar Haveli and Daman & Diu (UT)**
- **Delhi (National Capital Territory (NCT))**

Note: The list is presented in alphabetical order.

Creating Fields in an Object

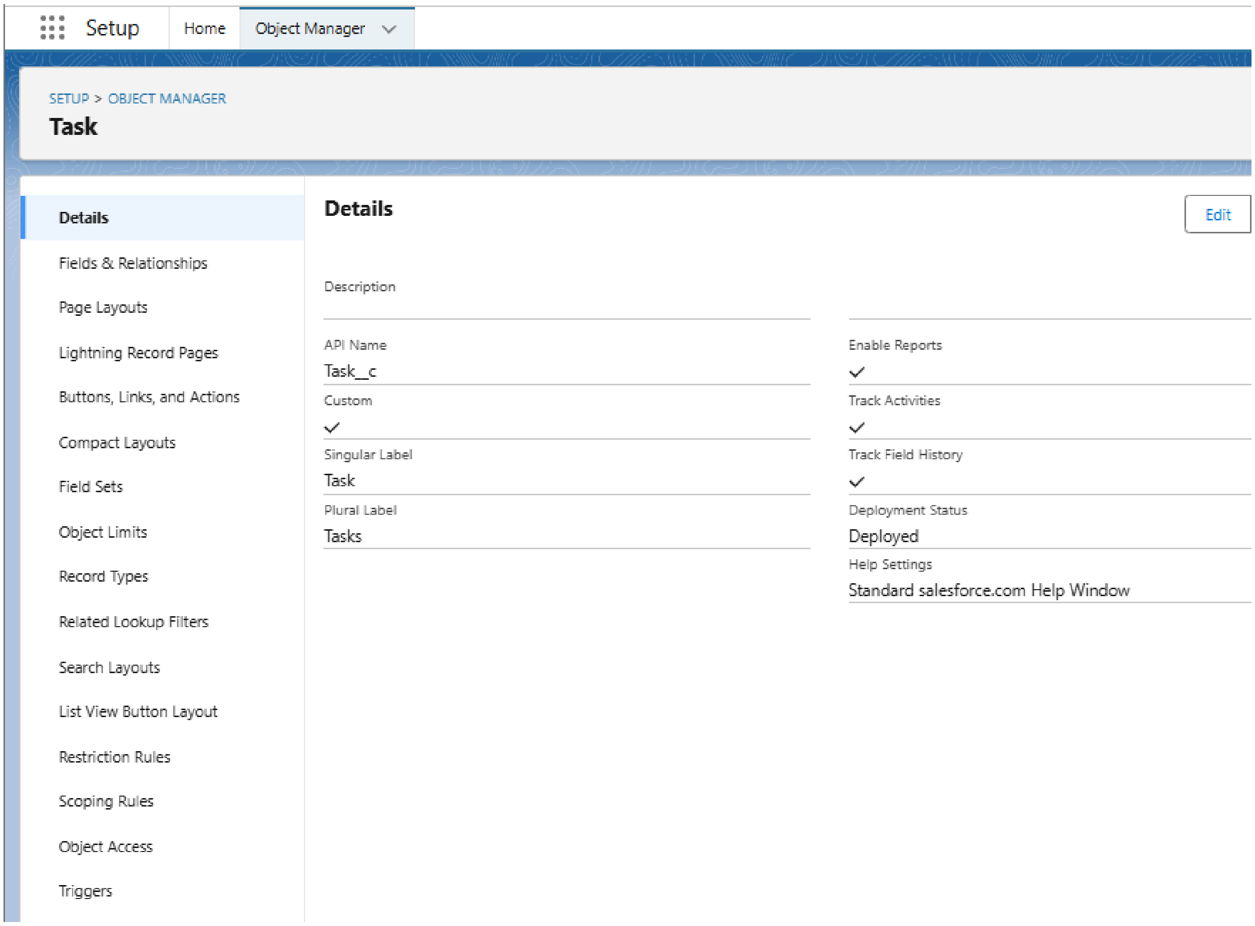
Creating a "Distance" Field

- **Steps:**Go to *setup*, click *Object Manager*, type *object name* (e.g., Task) in search bar, and click on the objectClick on *Fields & Relationships* >> *New*Select *Data type* as *Number* and click *Next*Fill the following:*Field Label*: Distance*Field Name*: Distance*Length*: 14*Decimal Places*: 4Check the *required check box*Click *Next* >> *Next* >> *Save and new*

Creating a "Task ID" Field

- **Steps:**Go to *setup*, click *Object Manager*, type *object name* (e.g., Task) in search bar, and click on the objectClick on *Fields & Relationships* >> *New*Select *Data type* as *Auto Number* and click *Next*Fill the following:*Field Label*: Task ID*Display Format*: TASK-{0}*Starting Number*:

1*Field Name*: automatically generatedCheck the *required check box*Click *Next* >> *Next* >> *Save and new*

- 

Adding Fields to an Object

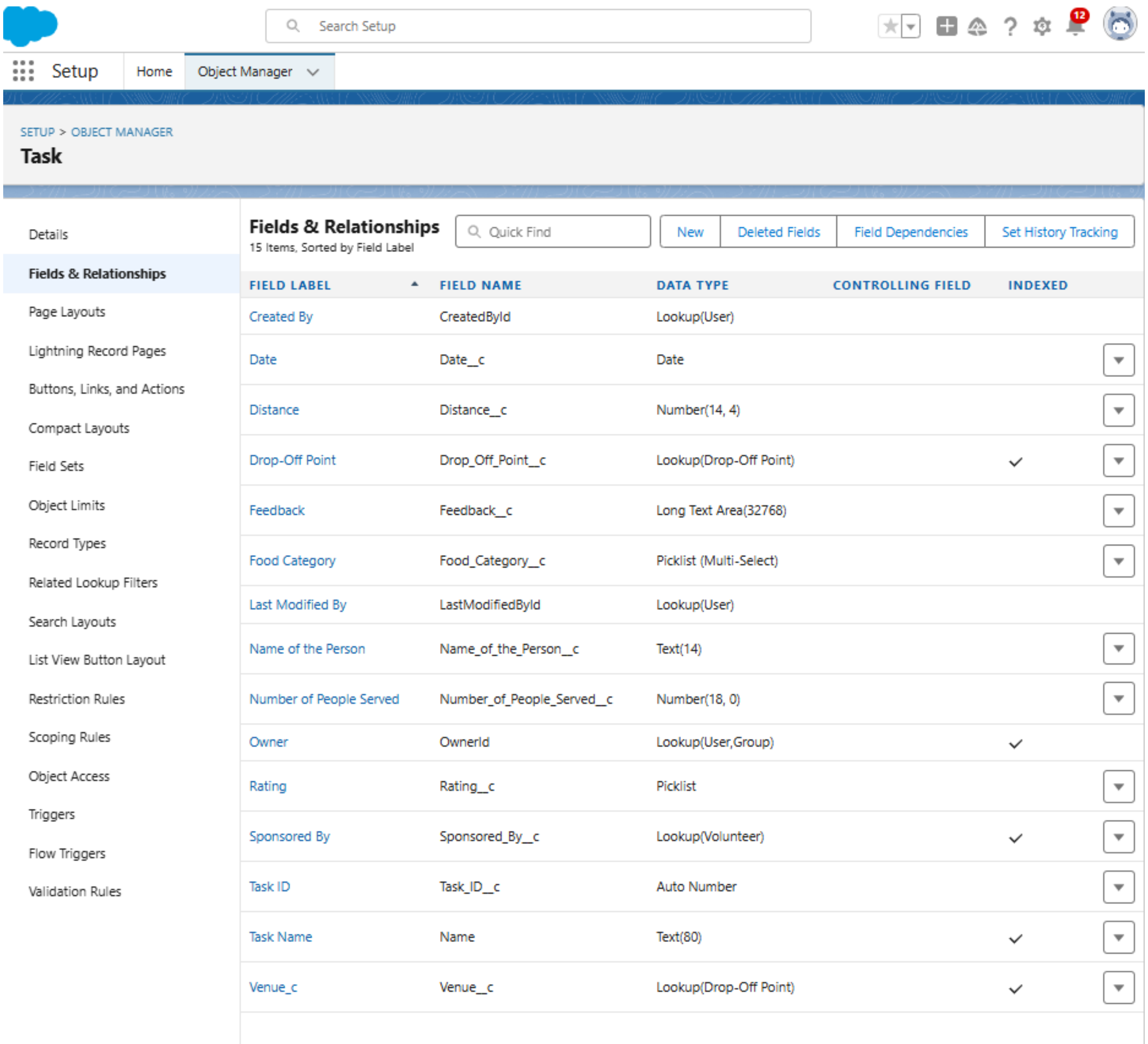
This document provides instructions for adding fields to an object, likely in a software application.

Adding a Date Field

- **Step 1:** Go to *Setup* and open *Object Manager*.
- **Step 2:** Search for the object type (e.g., "Task").
- **Step 3:** Open *Fields & Relationships* and select *New*.
- **Step 4:** Choose *Date* as the data type and click *Next*.
- **Step 5:** Fill in the following:*Field Label*: **Date***Field Name*: **Date**Check the *required* box.
- **Step 6:** Click *Next* twice, then *Save and new*.

Adding a Multi-Select Picklist Field

- **Step 1:** Go to *Setup* and open *Object Manager*.
- **Step 2:** Search for the object type (e.g., "Task").
- **Step 3:** Open *Fields & Relationships* and select *New*.
- **Step 4:** Choose *Picklist (Multi-Select)* as the data type and click *Next*.
- **Step 5:** Fill in the following:*Field Label*: **Food Category***Field Name*: **Food Category**Enter the values for the picklist (Veg, Non-Veg, Salad, Snack), each on a new line.
- **Step 6:** Check the *required* box.
- **Step 7:** Click *Next* twice, then *Save and new*.



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Adding Fields to Objects

This document provides instructions for adding fields to different objects.

Adding a "Rating" Field

- **Object:***Task*
- **Steps:**Go to *Setup* and open *Object Manager*.Search for the *Task* object.Click on *Fields & Relationships -> New*.Select *Data Type* as *Pick List*.Click *Next*.Fill in *Field Label* as *Rating*.Fill in *Field Name* as *Rating*.Enter values for the *Rating* field, each on a new line (e.g., 1, 2, 3, 4, 5).Click *Next -> Next -> Save and new*.

Adding a "Feedback" Field

- **Object:***Task*
- **Steps:**Go to *Setup* and open *Object Manager*.Search for the *Task* object.Click on *Fields & Relationships -> New*.Select *Data Type* as *Long Text Area*.Click *Next*.Fill in *Field Label* as *Feedback*.Fill in *Field Name* as *Feedback*.Click *Next -> Next -> Save and new*.

Adding a "Auto Number" Field

- **Object:***Volunteer*
- **Steps:**Go to *Setup* and open *Object Manager*.Search for the *Volunteer* object.Click on *Fields & Relationships -> New*.Select *Data Type* as *Auto Number*.Click *Next*.Fill in the required fields.Click *Next -> Next -> Save and new*.

Adding Fields to an Object

This document provides instructions for adding fields to an object, likely within a database or software application.

Steps for Adding a Field

- **Find the Object:** Navigate to the *Object Manager* and search for the desired object (e.g., "Volunteer").
- **Access Field Creation:** Click on the "Fields & Relationships" section and select "New."
- **Choose Data Type:** Select the appropriate data type (e.g., "Number," "Email").

- **Add Field Details:** Fill in the required information, including:**Field Label:** A descriptive name for the field (e.g., "Age").**Field Name:** The internal name for the field (e.g., "Age").**Required Check Box:** Ensure the field is required.
- **Save Changes:** Click "Next" twice and then "Save" to finalize the field addition.

The instructions repeat these steps for adding fields with different data types (Age, Email, and Contact Number).

Creating Fields in an Object

Contact Number Field

- **Field Name:***Contact Number*
- Click on the *required check box*
- Click *Next >> Next >> Save and new*.

Address Field

- **Steps to create:**Go to *setup*, click *Object Manager*, type *Volunteer* in search bar, then click on the object.Click on *Fields & Relationships >> New*Select *Data type* as *Text Area (Long)* and click *Next*Fill the *label* and *name* as *Address*Click *Next >> Next >> Save and new*.

Date of Birth Field

- **Steps to create:**Go to *setup*, click *Object Manager*, type *Volunteer* in search bar, then click on the object.Click on *Fields & Relationships >> New*Select *Data type* as *Date* and click *Next*Fill the *label* and *name* as *Date of Birth*Click *Next >> Next >> Save and new*.

Execution ID Field

- **Steps to create:**Go to *setup*, click *Object Manager*, type *Volunteer* in search bar, then click on the object.Click on *Fields & Relationships >> New*Select *Data type* as *Auto Number* and click *Next*Fill in *label* as *Execution ID*.

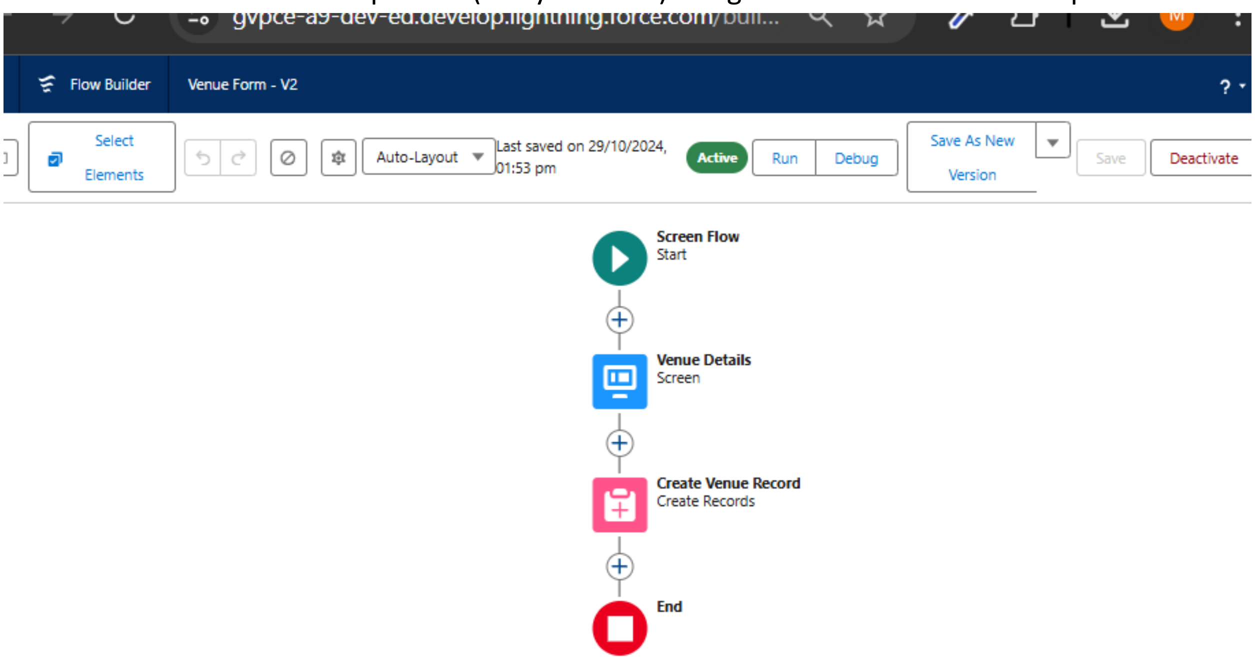
Creating a Flow for Venue Records

Initial Setup

- **Field Name:** Automatically generated.
- **Required Check Box:** Click to select.
- **Next Steps:** Click "Next" and "Save," then "New."
- **Flow Creation:**Navigate to Setup.Search for "Flow."Select "New Flow."Choose "Screen Flow."Click "Create."

Adding Components

- **Screen Element Modification:** Add elements using the "+" icon.
- **Screen Properties:** Configure screen properties (e.g., label).
- **Component Addition:**Add text components for *Venue Name*, *Email*, *Phone*, *Venue Location*.Add a number component (likely for data).Assign API names to each component.



Venue Creation Instructions

Step-by-Step Guide

- **Step 10:** Name the latitude component.
- **Step 11:** Name the longitude component and click "Done."
- **Step 12:** Click the "+" symbol between the venue details and the end. Click on the "create record" element.
- **Step 13:** Rename this new element as "Create Venue Record."
- **Step 13 (Continued):**Create one venue record.**Set Venue Record Fields:** Use separate resources and literal values.**Object:** Venue**Set Field Values:** Click "Add Field" five times to populate the required fields. Each field will be populated with a specific value.

Field Value Settings

Field	Value
Contact Email	{!Contact_Email.value}
Contact Phone	{!Contact_Phone.value}
Name	{!Venue_Name}
Venue Location	{!location}
Latitude	{!latitude}
Longitude	{!longitude}

Note:{!...} likely represents a syntax for referencing specific values within a system.

Creating a Record and Trigger

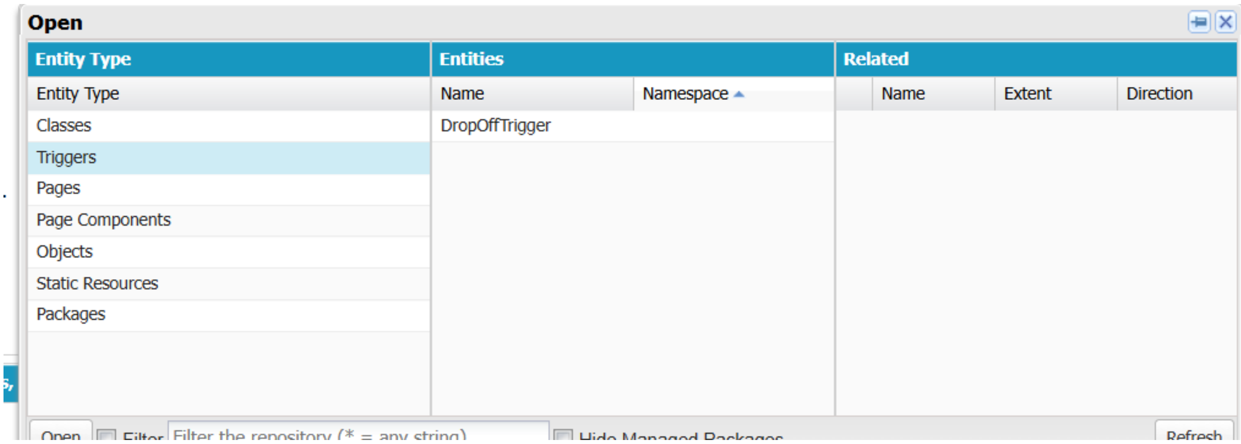
This document describes how to create a record and a trigger in a Salesforce-like system.

Creating a Record

- **Set field values:** The system allows setting values for fields like *Contact Email*, *Contact Phone*, *Name*, and *Venue Location*.
- **Click on Save:** Save the record with a specified *Flow Label* and *Flow API Name*.

Creating a Trigger

- **Access Developer Console:** Log in to the account and navigate to the developer console.
- **Create a Trigger:**Open the *File* menu in the toolbar.Select *New > Trigger*.
- **Configure Trigger:**Enter the *trigger name*.Specify the *object* to be triggered.



Keyboard Shortcuts

- A table of keyboard shortcuts is provided for common actions.

Action	Shortcut
Open	CTRL+O
Open Resource	CTRL+SHIFT+O
Open Lightning Resources	CTRL+SHIFT+A

New Apex Trigger Configuration

Trigger Creation

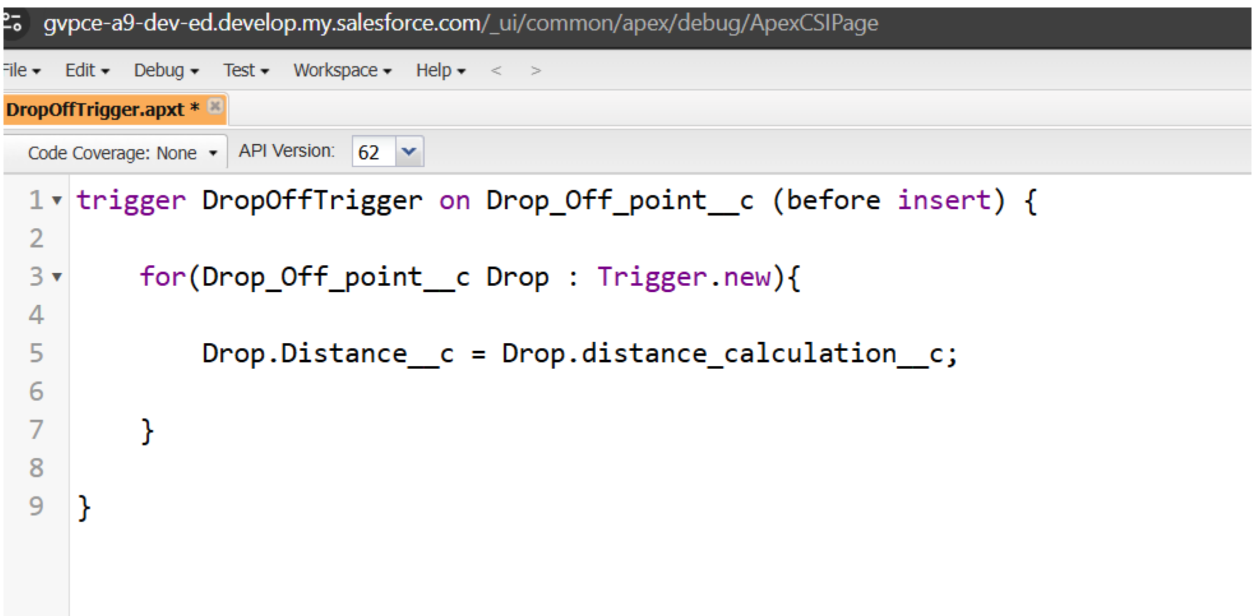
- **Name:***DropOffTrigger*
- **Object:***Drop-Off Point*
- **Action:***Click on Submit*

Trigger Code Description

- **Purpose:** This trigger assigns the *Distance* field value from the *Distance Calculation* field. This is for use in sharing rules.

Trigger Code

trigger DropOffTrigger on Drop_Off_point_c (before insert) {
for(Drop_Off_point_c Drop: Trigger.new){
Drop.Distance_c = Drop.distance_calculation_c;
}
}



Profile Creation

- **Objective:** Create a new profile.
- **Steps:**Go to setup page.Type *Profiles* in Quick Find.Click on *Profiles*.Click on *Clone* beside *Standard Platform User*.Select *NGOs Profile* as the new profile name.Click *Save*.

User Creation Instructions

Creating User 1

- **Steps:** Go to the setup page, search for "users", click "New user".
- **General Information:** Fill in details like First Name, Last Name, Alias, Email, Username, and select the *User License* and *Profile*.
- **Username:** The *username* should be different from the *email*.
- **Example:** First Name: *Iksha Foundation*, Last Name: *Iksha_Foundation*, Alias: *iiksh*, Email: *ikshafoundation@sb.com*, *User License*: Salesforce Platform, *Profile*: NGOs Profile.
- **Active:** Check the "Active" box.

Saving the User

- Click "Save" button.

Creating Users 2 and 3

- **Steps:** Create two more users using the same steps as for User 1.
- **Differences:** Use different first and last names for each user, reflecting different NGOs.
- **Example:** Using different NGO names will create different user entries.

Field	User 2 (Example)	User 3 (Example)
First Name	NSS	Street Cause
Last Name	NSS	Street Cause
Username	nss@sb.com	streetcause@sb.com
Profile	NGOs Profile	NGOs Profile

Note: This document provides instructions for creating users with specific details and profiles. The different NGO names are used to create different user entries.

Creating Public Groups and Report Types

This document provides instructions for creating public groups and custom report types.

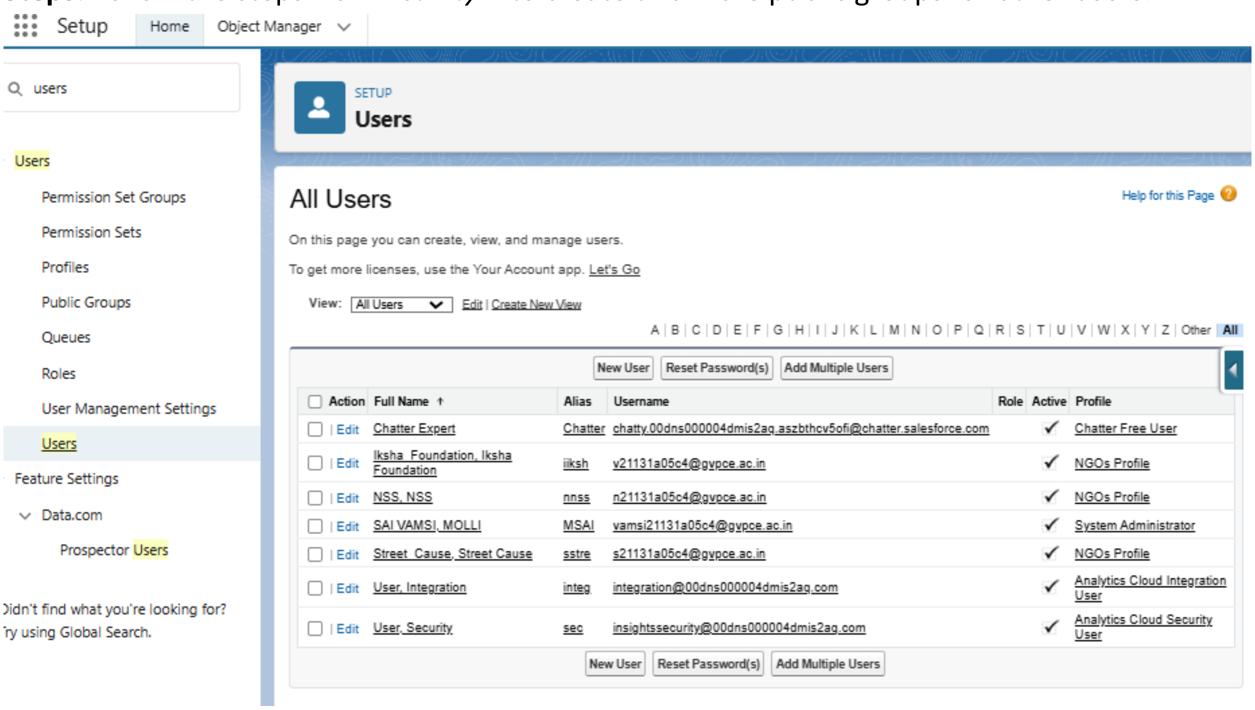
Creating Public Groups

Public Group 1

- **Steps:** Navigate to the *setup page*, search for *Public Groups*, click *New*, enter *Iksha* for the label and name, grant access using hierarchies, select the relevant users, and add administrators.

Public Group 2

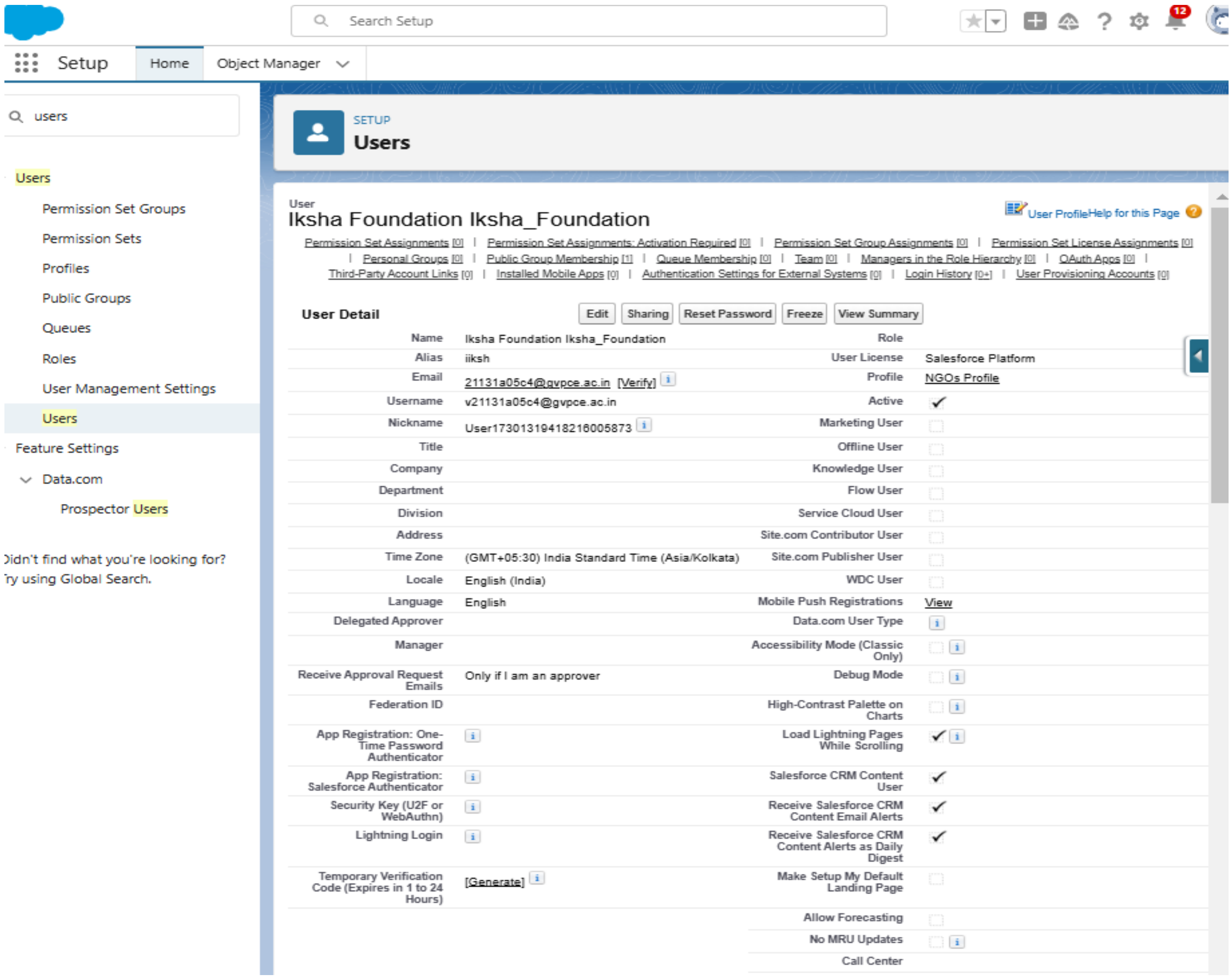
- **Steps:** Follow the steps from *Activity 1* to create two more public groups for other users.



Creating Custom Report Types

Report Type Creation

- **Steps:** Navigate to the *setup page*, search for *Report Types*, click *New Custom Report Type*, choose *Venues* as the primary object, name the type *Venue with DropOff with Volunteer*, describe it, save it to the *Other Reports* category, and set the deployment status to *Deployed*.
- **Additional Steps:**Click *Next*Link to other objects, such as *Drop-Off Points*.Select records that may or may not have related records.



Creating a Report on Venue with Drop-Off and Volunteer

Instructions

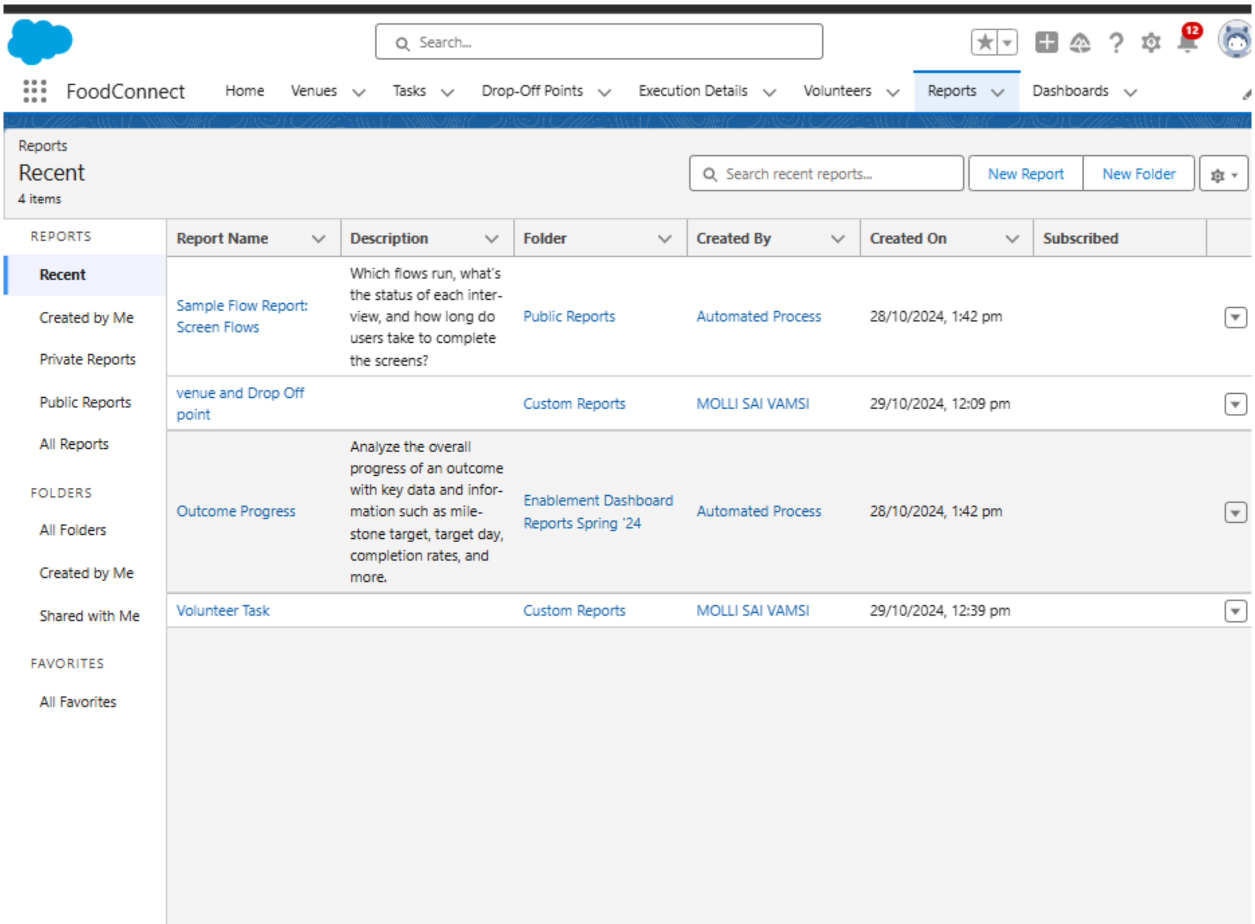
This document describes how to create a report showing volunteer information, venue details, and distances.

- **Access the app:** Go to the *FoodConnect* app and click on the reports tab.
- **Create a folder:** Click on *New Folder*, name it *Custom Reports*, and save it.
- **Open a new report:** Open the *Custom Reports* folder and click on *New Report*.
- **Select report type:** Choose *Venue with DropOff with Volunteer* as the report type.
- **Start the report:** Click on *Start Report*.

- **Add fields:** Add *Volunteer Name*, *Venue Name*, *Drop-Off point Name*, and *Distance* to the report.

Report Details

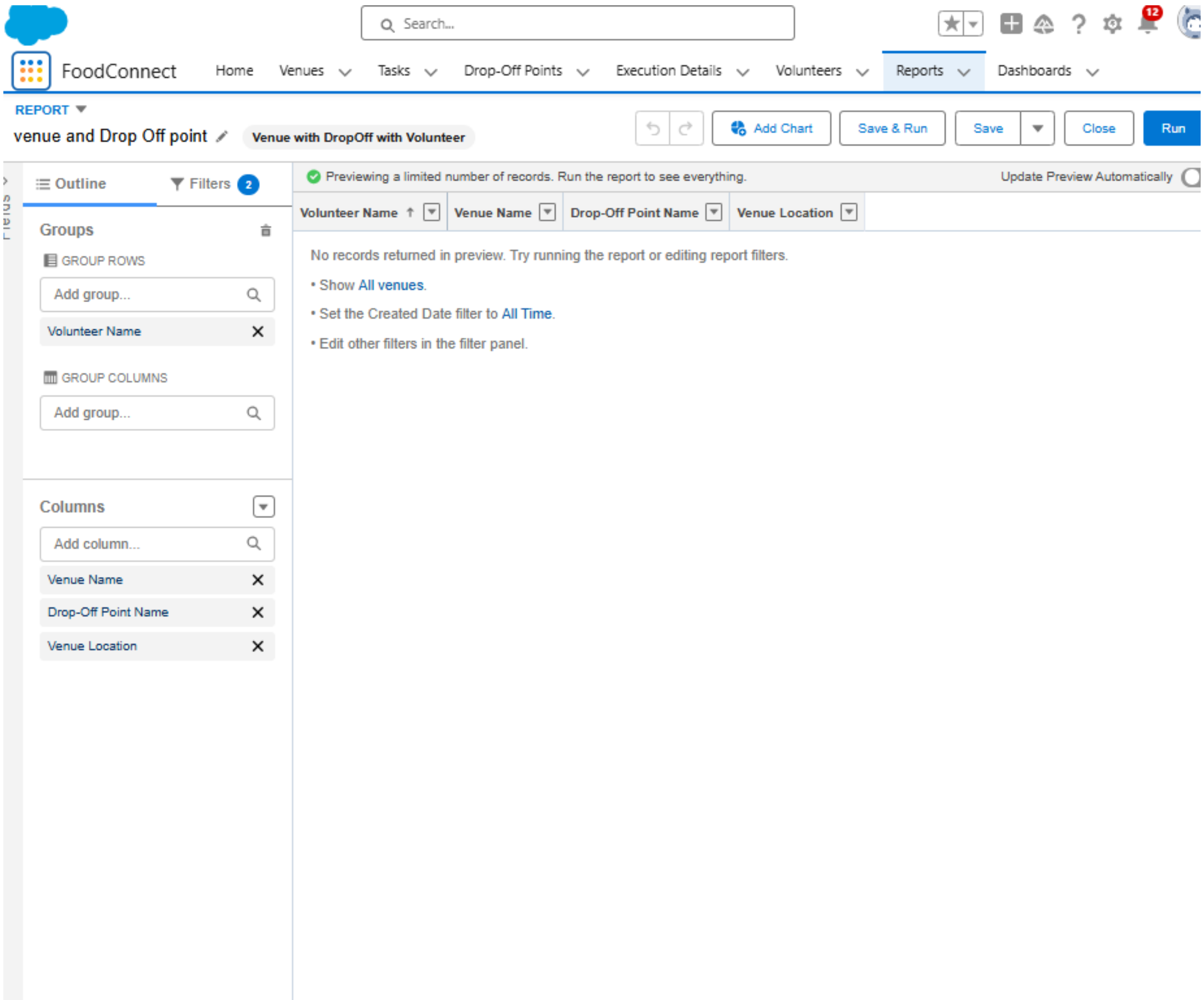
- **Data display:** The report displays data in a table format.
- **Grouping:** Volunteer names are grouped together.
- **Calculations:** Subtotals and totals of distances are present.



-

Saving the Report

- **Save and run:** Click on *Save & Run*.
- **Label:** Give a label to the report.
- **Name:** Name the report *venue and Drop Off point*.
- **Unique Name:** The *Unique Name* will be automatically populated.
- **Save:** Click *Select Folder*, choose *Custom Report*, and click *Save*.

- 

Creating a Volunteer Report

Generating the Report

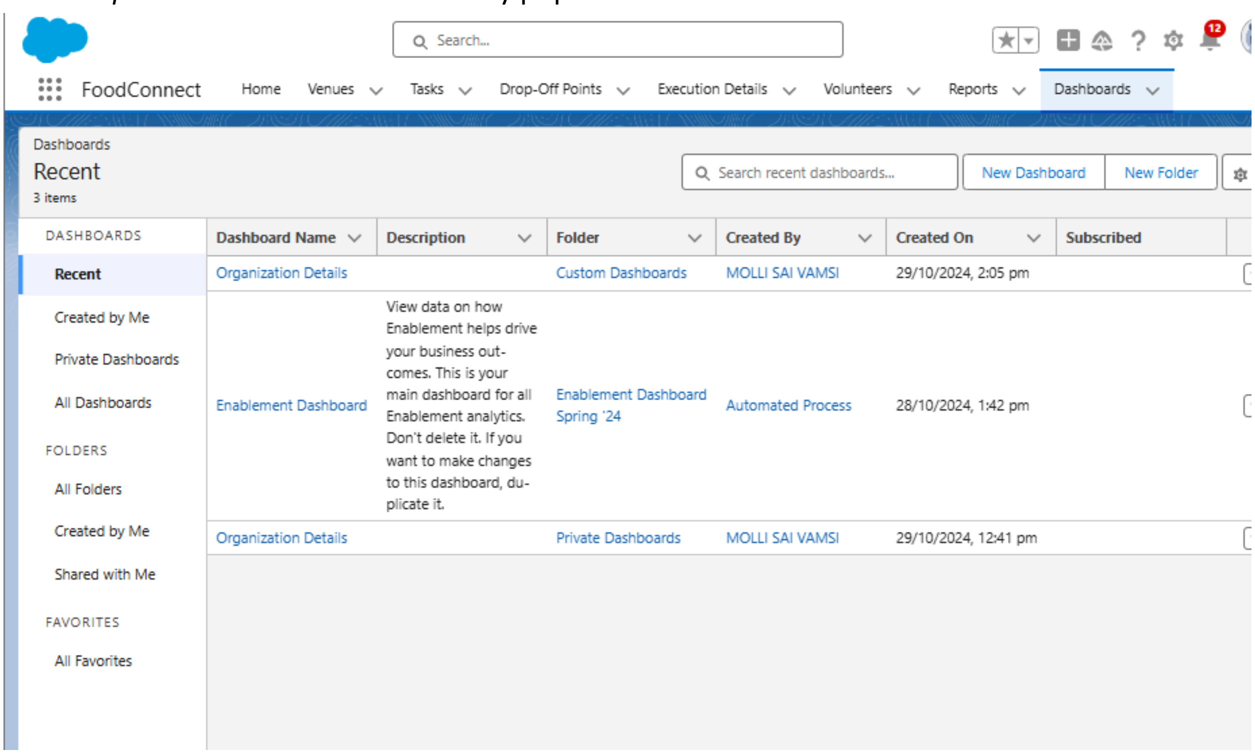
- Open the *FoodConnect* app.
- Navigate to the *reports* tab.
- Select *Custom Reports*.
- Choose the *Volunteers with Execution Details and Tasks* report type.
- Start the report.
- Group the rows by *Volunteer ID*.
- Add columns for:*Volunteer NameTask NameExecution DetailOwner NameTask DateTask Rating*

Saving the Report

- Click *Save & Run*.
- Label the report as *Volunteer Task*.
- The *Unique Name* will be automatically populated.
- Select the *Custom Report* folder and click *Save*.

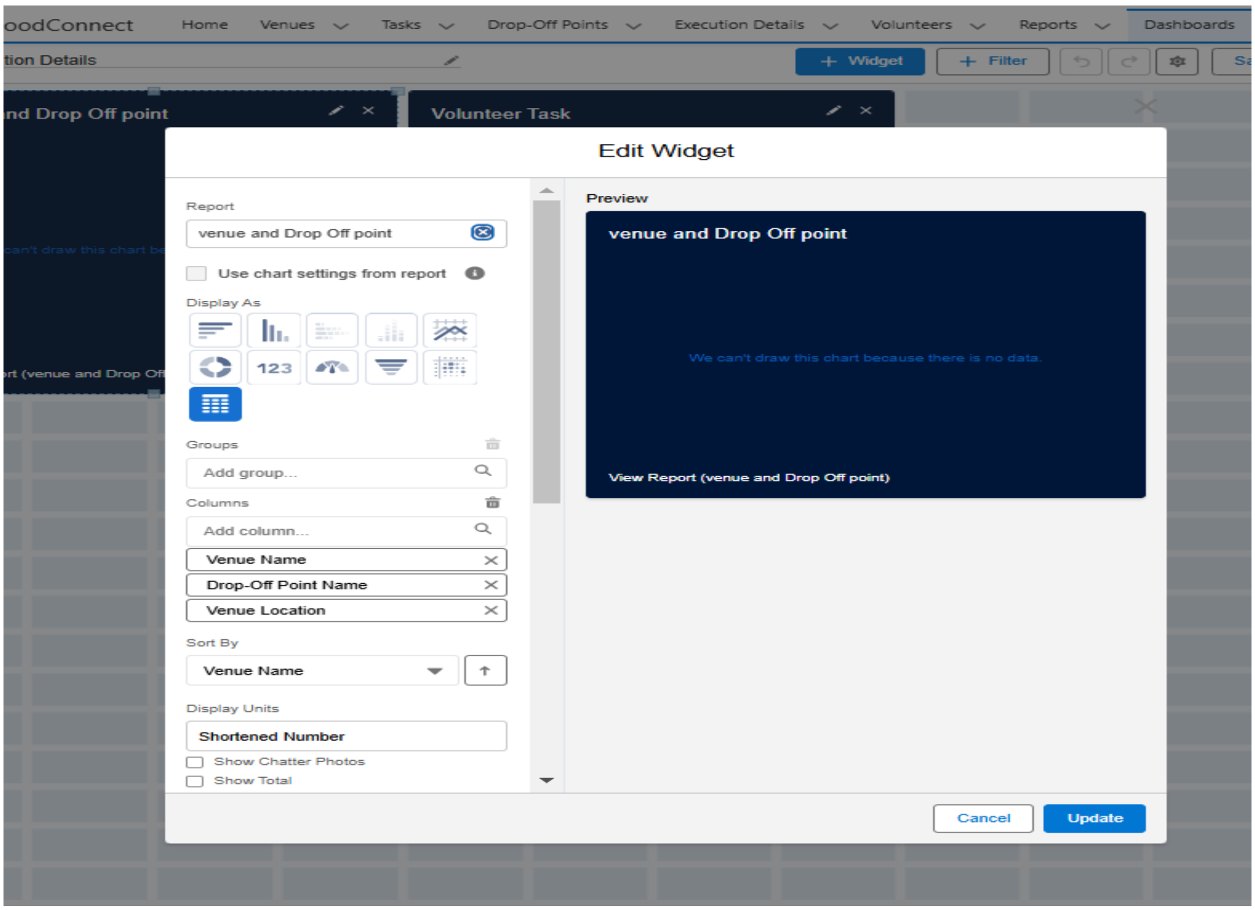
Adding a Dashboard Report

Creating the Dashboard Report

- Open the *FoodConnect* app.
- Navigate to the *Dashboards* tab.
- Create a new folder.
- Label the folder *Custom Dashboards*.
- The *Unique Name* will be automatically populated.
- 

Adding a Venue and Drop-Off Point Report

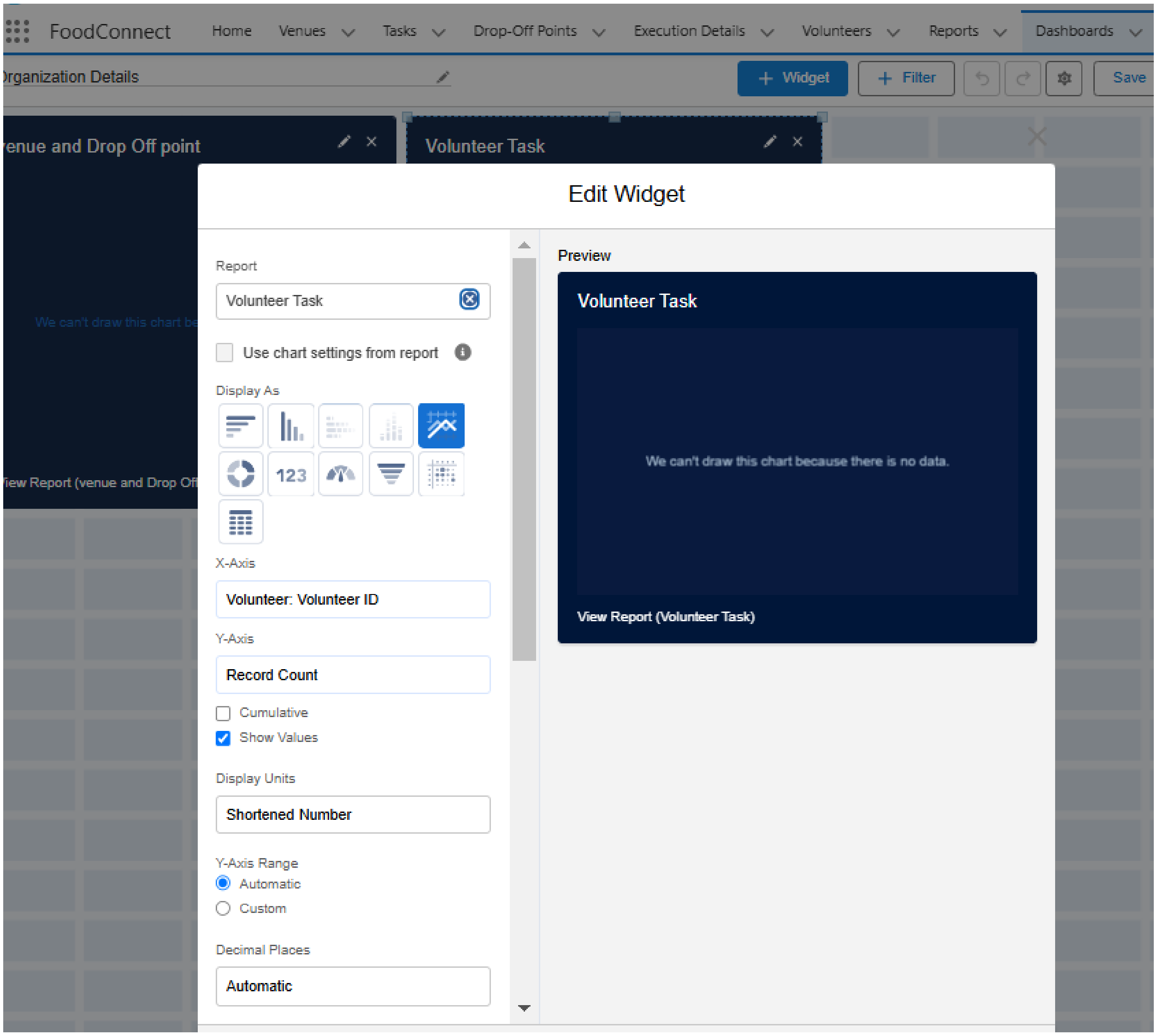
- **Open** a custom dashboard and select *New Dashboard*.
- **Name** the report *Organization Details*.
- **Select** a chart or table in the *Widget*.
- **Choose** the *venue and Drop Off point* report from the *Select Report* menu.
- **Select** the desired options in the *Add Component* section.



Adding a Volunteer Task Report

- **Click** on a *Widget* and select *Chart or Table*.
- **Select** the *Volunteer Task Report* from the *Select Report* menu.
- **Select** the desired options in the *Add Component* section.
- **Display** the report as a *Line Chart* and choose a *Dark* theme (optional).

Saving the Report

- **Click***save* to save the report to the dashboard.
- 

Adding a Picture to the Dashboard

Instructions

This document describes how to add an image to a dashboard.

- **Important:** The image must be downloaded first.

Steps

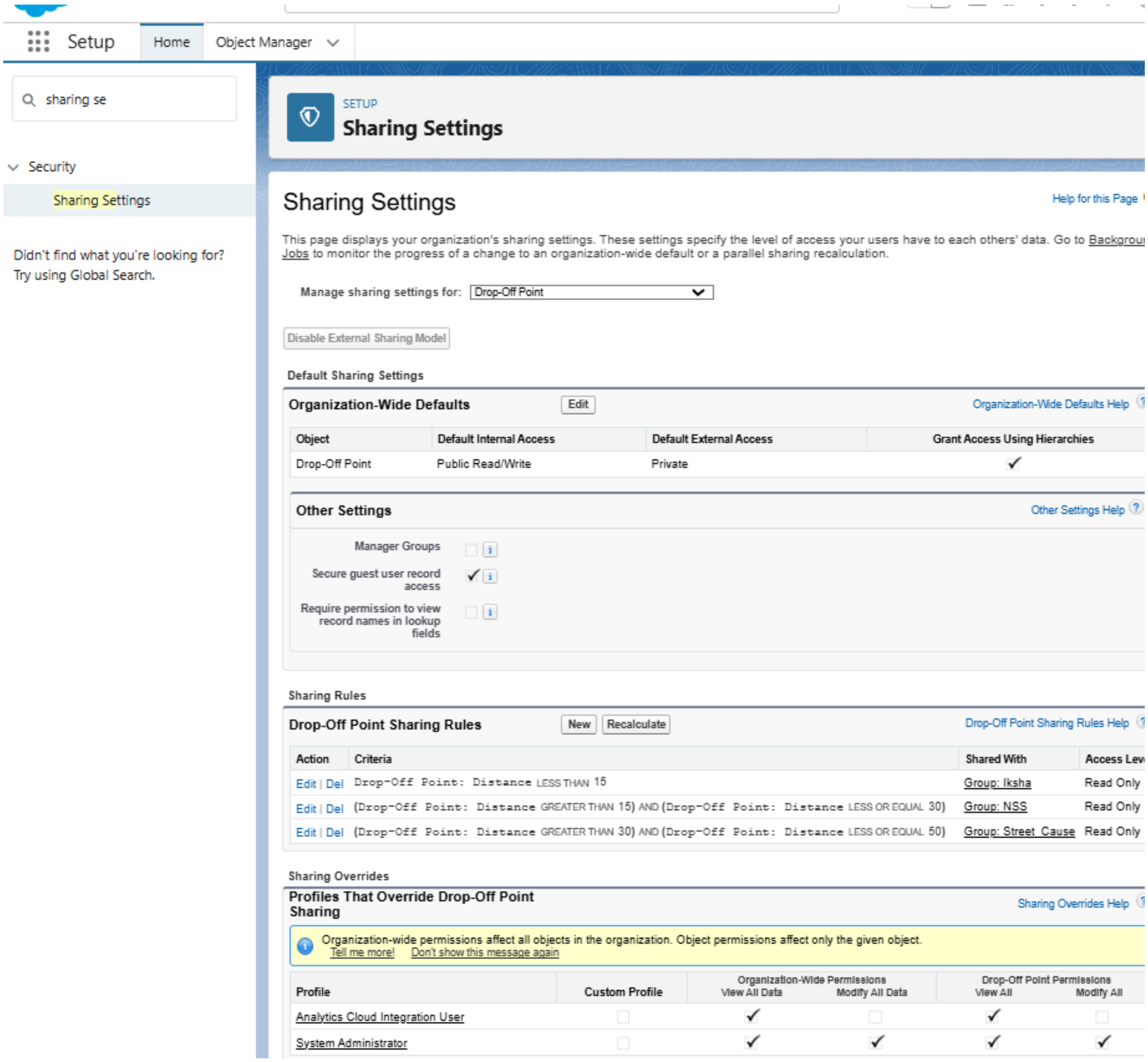
- **Step 1:** Click on *Widget* and *Image*.
- **Step 2:** Click on *Browse Files* to select the image.
- **Step 3:** Choose the image and click *Save As*.**Name:***Task Execution Details*
- **Step 4:** Click on *Select Folder*, choose *Custom Dashboards*, and click *Save*.

Sharing Settings Instructions

Creating Drop-Off Point Sharing Rules

This document outlines steps for creating sharing rules based on distance for Drop-Off points.

- **Instructions:**Navigate to *Sharing Settings*.Locate *Drop-Off point Sharing Rules*.Create a new rule.Define the rule's name and type.Specify criteria for selecting records to share.The criteria uses *distance* as the field.Filtering options include *less than*, *greater than*, and *less than or equal to*.Examples include distances less than 15, greater than 15, or less than or equal to 30 or 50.Select users and groups to share with.Examples include *Iksha* and *NSS* and *Street Cause*.Click *Save* after each rule creation.



Rule Name	Distance Criteria	Shared With
Rule 1	Less than 15	Iksha
Rule 2	Greater than 15, Less than or equal to 30	NSS
Rule 3	Greater than 30, Less than or equal to 50	Street Cause

Creating a Home Page in Lightning App Builder

Steps for Creation

- Go to *setup*, search for "Lightning App Builder", and click "New".
- Select "Home Page" and label it "HOME Page".
- Choose a "Standard Home Page".
- Locate "Flow" and "Drag and Drop" components in the right-hand section.
- Place "Flow: Venue Flow" on the right.
- Add a "Dashboard" component to the first section.
- Click "Save and Activation," then "App Default," and "Add Assignments".
- Add the "FoodConnect App" and save.

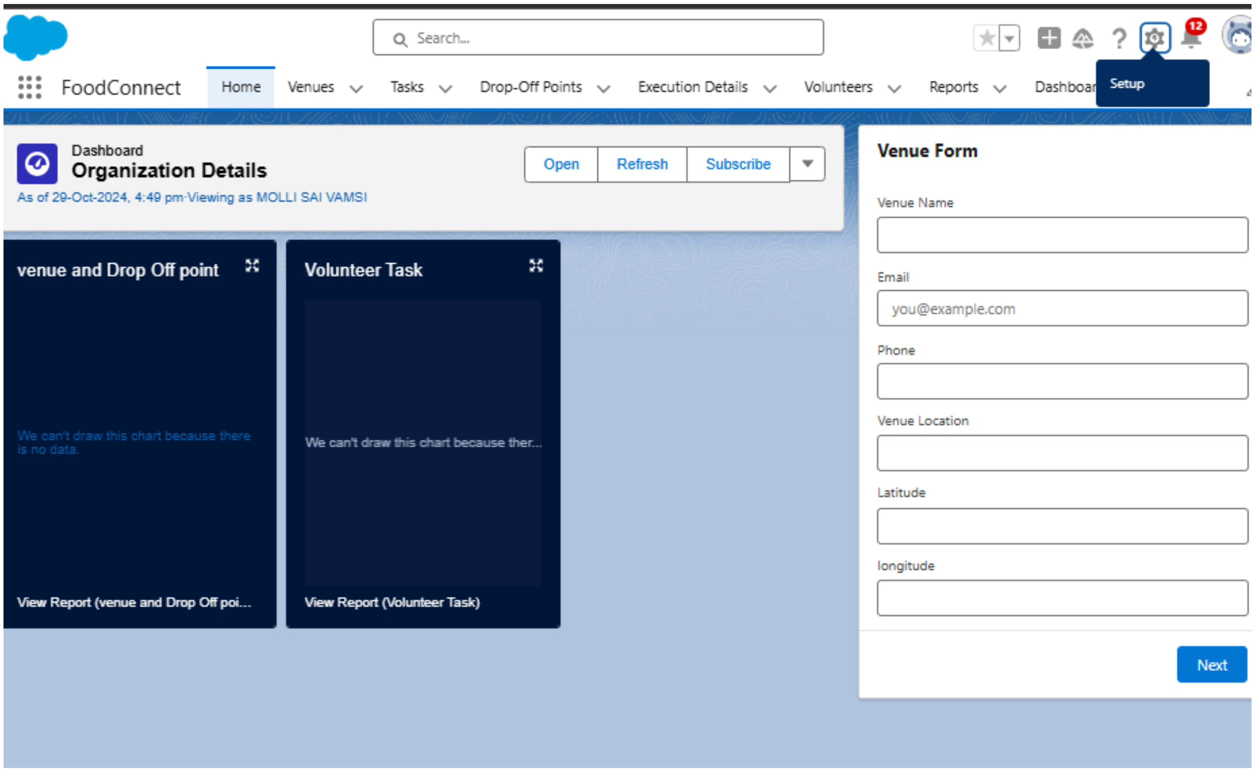
FoodConnect Task Execution Details

Summary of Data

- **Date and Time:***29-Oct-2024, 9:55 am*
- **Data Type:** Information on venues and drop-off points.
- **Task Details:** Shows the current status of venue and drop-off point tasks.

Venue and Drop-Off Points

- **La Royale Banquet Hall (Shapur):***5.116*
- **La Royale Banquet Hall (Jeedimetla):***6.903*
- **Paradise Garden (Suraram Village):***28.23*



Volunteer Task

- **Record Count:** Shows a *graph* depicting the number of volunteer tasks.
- **Volunteer ID:** Identifies the volunteer.

Venue Form

- **Purpose:***A form for entering venue details*.
- **Fields:** Includes venue name, email, phone, and location.
- **Action:** Allows users to fill in the form and proceed to the next step.