

Project Title Project to Supply Leftover Food to the Poor Using Salesforce

Submitted by

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1. Project Overview

This project addresses the challenge of food waste and hunger by leveraging Salesforce technology to facilitate the distribution of surplus food to those in need. Through this solution, we aim to efficiently connect donors, such as restaurants and grocery stores, with organizations that assist the needy. Utilizing Salesforce CRM as the core platform, the project enables real-time tracking of donations, manages logistics, and ensures timely delivery. This initiative promotes transparency, accountability, and improved resource allocation within the network of food donors and recipients.

2. Objectives

- **Business Goals:** Reduce food waste and combat hunger by connecting food suppliers with non-profits and shelters.
- **Specific Outcomes:**
 - Establish a reliable network of food donors and recipients.
 - Automate the matching process of food donations based on location, food type, and urgency.
 - Enable field agents to track deliveries and update statuses in real-time.

3. Salesforce Key Features and Concepts Utilized

- **Objects:** Custom objects created for Drop-Off Points, Tasks, Execution Details, Volunteers, and Venues to manage data specific to the project.
- **Tabs:** Custom tabs for key objects like Venues, Execution Details, and Volunteers, improving data organization and accessibility.
- **Lightning App:** Built for a smooth and user-friendly interface.
- **Fields:** Custom fields for storing detailed information about tasks, volunteer details, and drop-off points.

- **Flows:** Automated workflows for creating records and notifying users.
- **Triggers:** Apex triggers to enforce business logic and ensure data consistency.
- **Profiles and Users:** Defined specific roles and access levels to secure and organize data handling.
- **Public Groups:** Grouped users for simpler sharing and permissions management.
- **Report Types:** Created to facilitate custom reporting and track metrics like volunteer efficiency and food distribution effectiveness.
- **Dashboards:** Visual representation of key metrics, enabling better decision-making and operational insights.
- **Sharing Rules:** Used to extend access to records for users in public groups, ensuring secure and organized data sharing across the system.

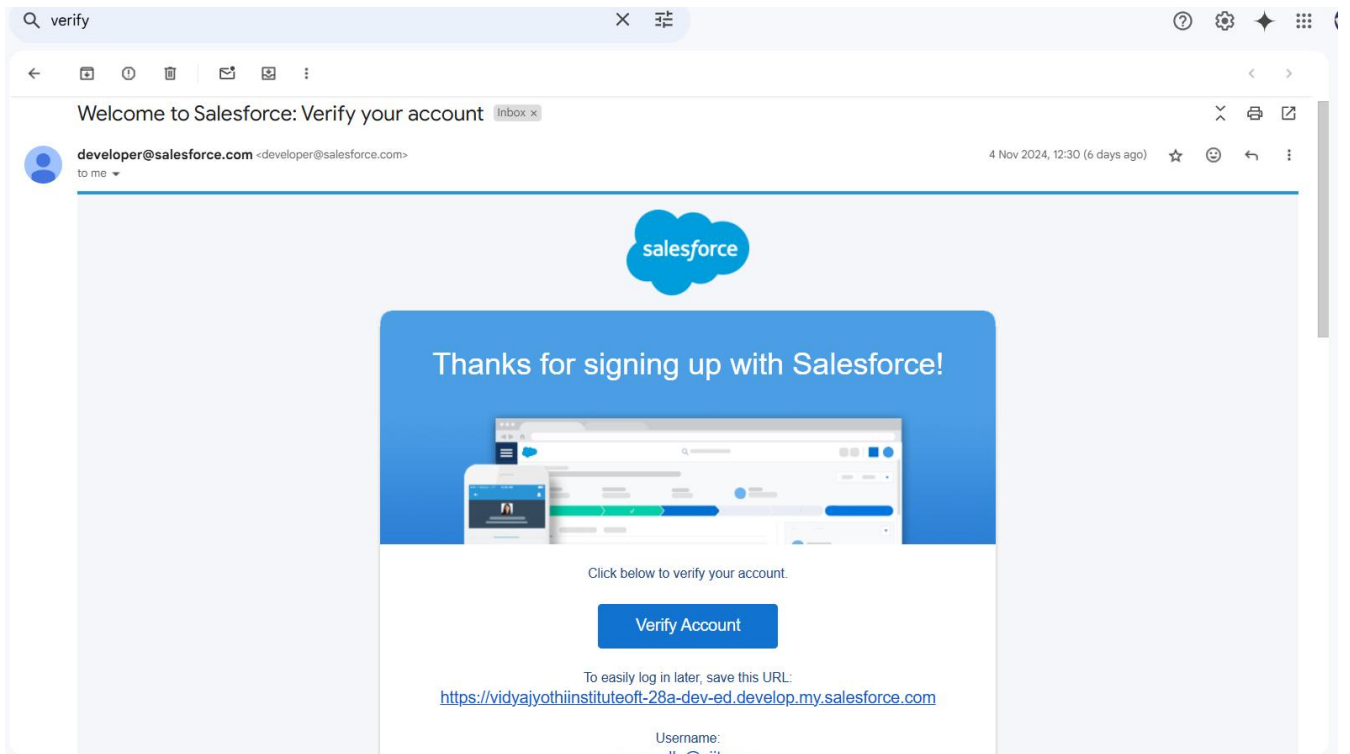
4. Detailed Steps to Solution Design

The solution design involved creating custom objects, fields, tabs, and lightning applications to build a user-friendly interface. Each object was carefully tailored to meet the unique data requirements for the project:

- **Data Model:** Custom objects (Drop-Off Points, Volunteers, etc.) organized data effectively, while relationships between objects streamlined the distribution workflow.
- **User Interface:** Custom tabs and Lightning components facilitated easy access to information, optimized for mobile use.
- **Business Logic:** Flows and triggers automated donation alerts, assignment of volunteers, and tracking of delivery updates to ensure a smooth process.

salesforce developer account creation

- Creating a developer org in salesforce
- Account Activation



Object

In Salesforce, an object is a database table that stores data related to a specific entity, such as customers, products, or sales transactions. Objects are the building blocks of Salesforce data models.

There are two types of objects in Salesforce:


1. **Standard Objects:** These are pre-built objects provided by Salesforce, such as Accounts, Contacts, Leads, and Opportunities, which cover common business processes.
2. **Custom Objects:** These are user-defined objects created to store data unique to a particular business or application. Custom objects can have custom fields, relationships, and custom logic through workflows and triggers.

Objects are essential for organizing and managing data within the Salesforce platform.

To create an object:

Here, We have Created All the objects which where asked.

a. Drop-Off Point



Setup Home Object Manager

SETUP > OBJECT MANAGER
Drop-Off Point

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

Details


Edit Delete

Description

API Name
 Drop_Off_Point__c
 Custom
 ✓
 Singular Label
 Drop-Off Point
 Plural Label
 Drop-Off Points

Enable Reports
 ✓
 Track Activities
 ✓
 Track Field History
 ✓
 Deployment Status
 Deployed
 Help Settings
 Standard salesforce.com Help Window

b. Task



Setup Home Object Manager

SETUP > OBJECT MANAGER
Task

Details
 Fields & Relationships
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 Compact Layouts
 Field Sets
 Object Limits
 Record Types
 Related Lookup Filters
 Search Layouts

Details


Edit Delete

Description

API Name
 Task__c
 Custom
 ✓
 Singular Label
 Task
 Plural Label
 Tasks

Enable Reports
 ✓
 Track Activities
 ✓
 Track Field History
 ✓
 Deployment Status
 Deployed
 Help Settings
 Standard salesforce.com Help Window

c. Execution Detail



Setup Home Object Manager

SETUP > OBJECT MANAGER
Execution Detail

Details
 Fields & Relationships
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 Compact Layouts
 Field Sets
 Object Limits
 Record Types
 Related Lookup Filters
 Search Layouts

Details

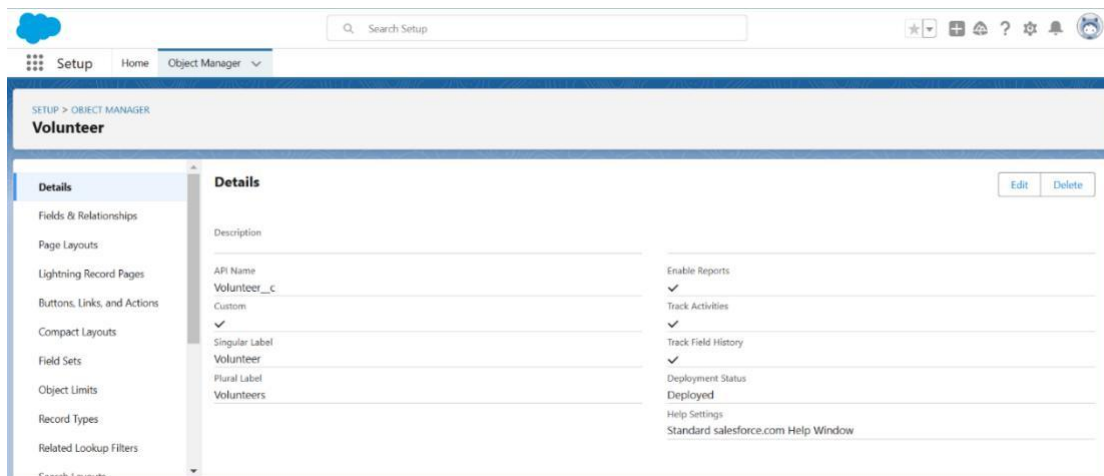
Edit Delete

Description

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

d. Volunteer



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

Details

Description

API Name: Volunteer__c

Custom: ☒

Singular Label: Volunteer

Plural Label: Volunteers

Enable Reports: ☒

Track Activities: ☒

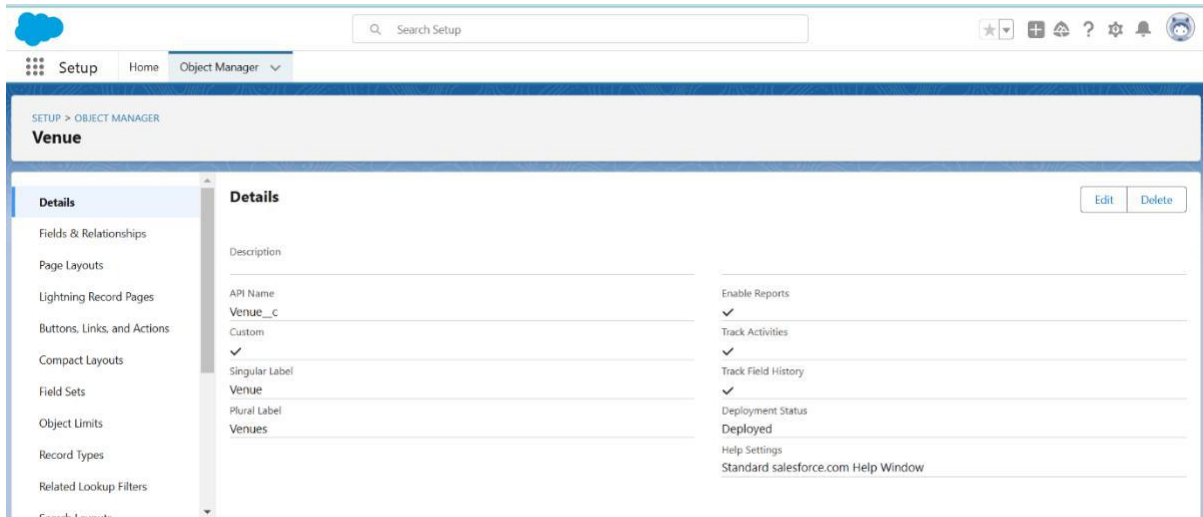
Track Field History: ☒

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Edit Delete

e. Venue



SETUP > OBJECT MANAGER

Venue

Details

- Fields & Relationships
- Page Layouts
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- Record Types
- Related Lookup Filters
- Search Layouts

Details

Description

API Name: Venue__c

Custom: ☒

Singular Label: Venue

Plural Label: Venues

Enable Reports: ☒

Track Activities: ☒

Track Field History: ☒

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Edit Delete

Tab:


What is Tab ?

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

- **Creating a Custom**

Tab Create Venues Tab


I) Drop-Off Point Tab



Setup Home Object Manager

User Interface
 Rename Tabs and Labels
Tabs

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


 SETUP
Tabs


Custom Object Tab
Drop-Off Points

Help for this Page


Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Edit Delete

Tab Label	Drop-Off Points	Tab Style	 Red
Object	Drop-Off Point	Splash Page Custom Link	
Description			
Created By	KEMBURU VENKAT MANEESH 26/10/2024, 3:52 pm	Modified By	KEMBURU VENKAT MANEESH 26/10/2024, 3:52 pm


II) Execution Details Tab



Setup Home Object Manager

User Interface
 Rename Tabs and Labels
Tabs

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


 SETUP
Tabs


Custom Object Tab
Execution Details

Help for this Page

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Edit Delete

Tab Label	Execution Details	Tab Style	 Purple
Object	Execution Detail	Splash Page Custom Link	
Description			
Created By	KEMBURU VENKAT MANEESH 26/10/2024, 3:53 pm	Modified By	KEMBURU VENKAT MANEESH 26/10/2024, 3:53 pm

III) Venues Tab

Setup Home Object Manager

Search Setup

tabs

User Interface

Rename **Tabs** and Labels

Tabs

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

SETUP
Tabs

Custom Object Tab
Venues

Help for this Page

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail [Edit](#) [Delete](#)

Tab Label	Venues	Tab Style	Apple
Object	Venue	Splash Page Custom Link	
Description			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 3:49 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 3:49 pm

IV) Volunteers Tab

Setup Home Object Manager

Search Setup

tabs

User Interface

Rename **Tabs** and Labels

Tabs

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

SETUP
Tabs

Custom Object Tab
Volunteers

Help for this Page

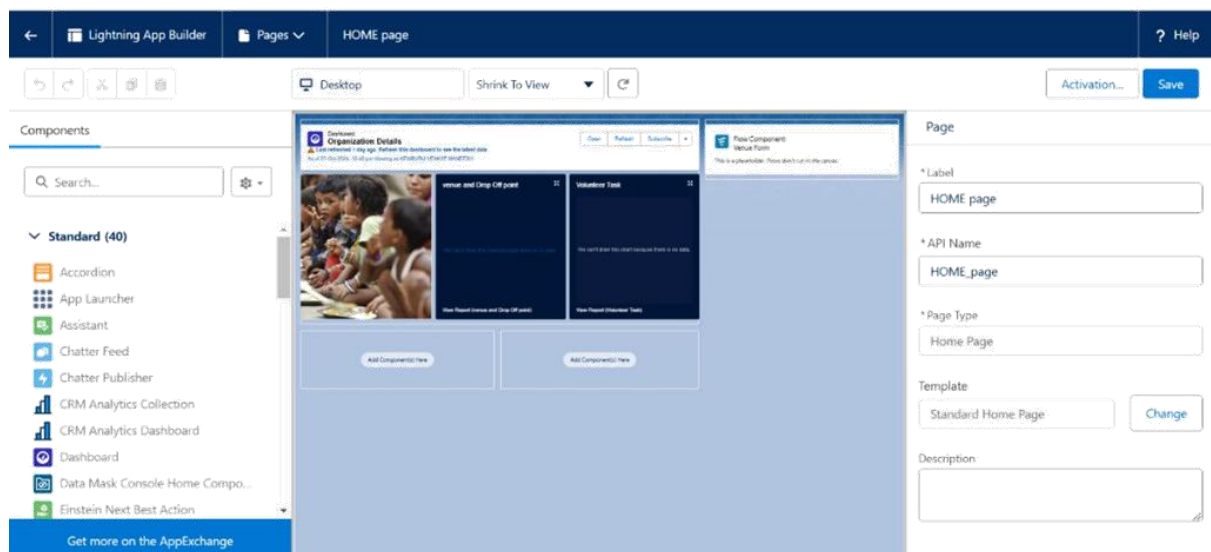
Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail [Edit](#) [Delete](#)

Tab Label	Volunteers	Tab Style	Heals
Object	Volunteer	Splash Page Custom Link	
Description			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 3:53 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 3:53 pm

4. Create a Lightning App

Will create a lightning app page-

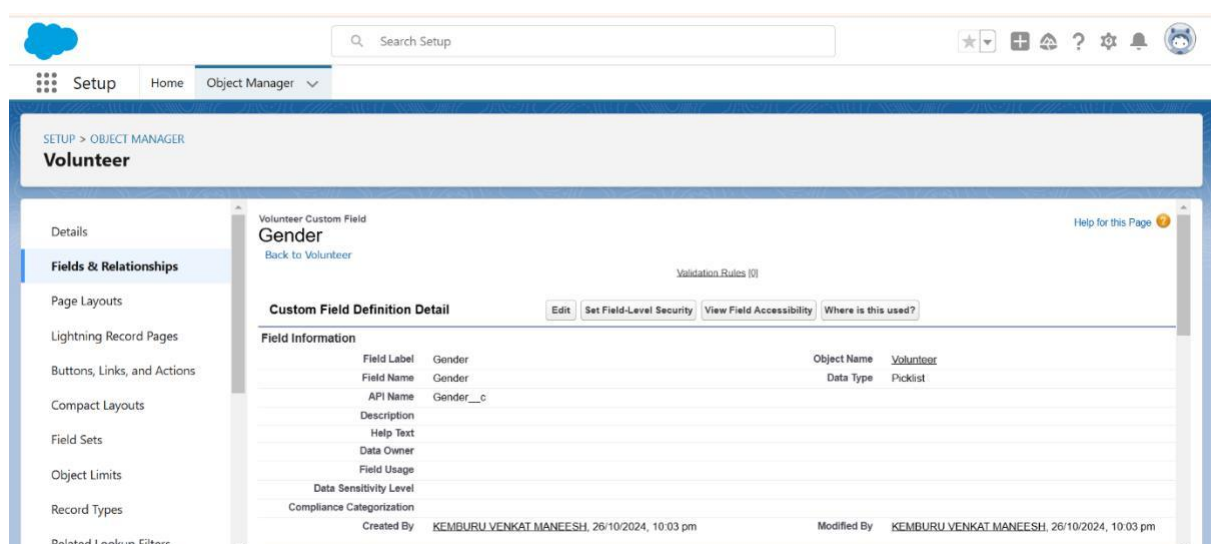


5)Fields


What is a Field?

Fields are specific data points within an object where individual pieces of information are stored. They are akin to columns in a database table and can hold various types of data, such as text, numbers, or dates.

Creation of Fields for the Volunteer Object - Gender



Execution ID



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Volunteer

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Volunteer Custom Field
Execution ID
[Back to Volunteer](#)

Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?

Field Information

Field Label	Execution ID	Object Name	Volunteer
Field Name	Execution_ID	Data Type	Auto Number
API Name	Execution_ID__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 10:16 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 10:16 pm

Date of birth



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Volunteer Custom Field
Date of Birth
[Back to Volunteer](#)

Validation Rules (0)
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?

Field Information

Field Label	Date of Birth	Object Name	Volunteer
Field Name	Date_of_Birth	Data Type	Date
API Name	Date_of_Birth__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 10:09 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 10:09 pm

Addresss



Setup
Home
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Volunteer

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Volunteer Custom Field
Address
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Validation Rules (0)
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?

Field Information

Field Label	Address	Object Name	Volunteer
Field Name	Address	Data Type	Long Text Area
API Name	Address__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 10:08 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 10:08 pm

Email



Setup Home Object Manager

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Volunteer

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Volunteer Custom Field
Email
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Validation Rules (0)

Custom Field Definition Detail
 [Edit](#)
[Set Field-Level Security](#)
[View Field Accessibility](#)
[Where is this used?](#)

Field Information		Object Name	Volunteer
Field Label	Email	Data Type	Email
Field Name	Email		
API Name	Email__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 10:07 pm		Modified By KEMBURU VENKAT MANEESH, 26/10/2024, 10:07 pm

Age



Setup Home Object Manager

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Validation Rules (0)

Custom Field Definition Detail
 [Edit](#)
[Set Field-Level Security](#)
[View Field Accessibility](#)
[Where is this used?](#)

Field Information		Object Name	Volunteer
Field Label	Age	Data Type	Number
Field Name	Age		
API Name	Age__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 10:06 pm		Modified By KEMBURU VENKAT MANEESH, 26/10/2024, 10:06 pm

Avaiable On

Setup Search Setup

Setup Home Object Manager

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Volunteer

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Available On
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Validation Rules (0)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Available On	Object Name	Volunteer
Field Name	Available_On	Data Type	Date
API Name	Available_On__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 10:05 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 10:05 pm

Drop_off_point

Setup Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Volunteer

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Volunteer Custom Field
Drop_Off_point
[Back to Volunteer](#)

Validation Rules (0)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Drop_Off_point	Object Name	Volunteer
Field Name	Drop_Off_point	Data Type	Master-Detail
API Name	Drop_Off_point__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 4:11 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 4:11 pm

Volunteer ID

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

Volunteer

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Volunteer Custom Field
Volunteer ID
[Back to Volunteer](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Volunteer ID	Object Name	Volunteer
Field Name	Volunteer_ID	Data Type	Auto Number
API Name	Volunteer_ID__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 10:03 pm		Modified By KEMBURU VENKAT MANEESH, 26/10/2024, 10:03 pm

Creation of Fields for the Venue Object

Contact Email

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

Venue

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Venue Custom Field
Contact Email
[Back to Venue](#)


[Validation Rules \(0\)](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Contact Email	Object Name	Venue
Field Name	Contact_Email	Data Type	Email
API Name	Contact_Email__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 6:18 pm		Modified By KEMBURU VENKAT MANEESH, 26/10/2024, 6:18 pm

Contact Phone



Setup Home Object Manager

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Venue Custom Field
Contact Phone
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Validation Rules (0)
 [Help for this Page](#)

Custom Field Definition Detail
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[Where is this used?](#)

Field Information			
Field Label	Contact Phone	Object Name	Venue
Field Name	Contact_Phone	Data Type	Phone
API Name	Contact_Phone__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 6:22 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 6:22 pm

Location



Setup Home Object Manager

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Venue Custom Field
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Validation Rules (0)
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Custom Field Definition Detail
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[Where is this used?](#)

Field Information			
Field Label	Location	Object Name	Venue
Field Name	Location	Data Type	Geolocation
API Name	Location__c		
Description	Enter the Geolocation of your Venue		
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 6:31 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 6:31 pm

Venue Location

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

Venue

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Venue Custom Field

Venue Location

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[Validation Rules \(0\)](#)

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Custom Field Definition Detail

Field Information

Field Label	Venue Location	Object Name	Venue
Field Name	Venue_Location	Data Type	Long Text Area
API Name	Venue_Location__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 6:33 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 6:33 pm

Creation of Fields for the Drop-Off Point Object

Location

2

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

Drop-Off Point

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Drop-Off Point Custom Field

Location 2

[Back to Drop-Off Point](#)

[Validation Rules \(0\)](#)

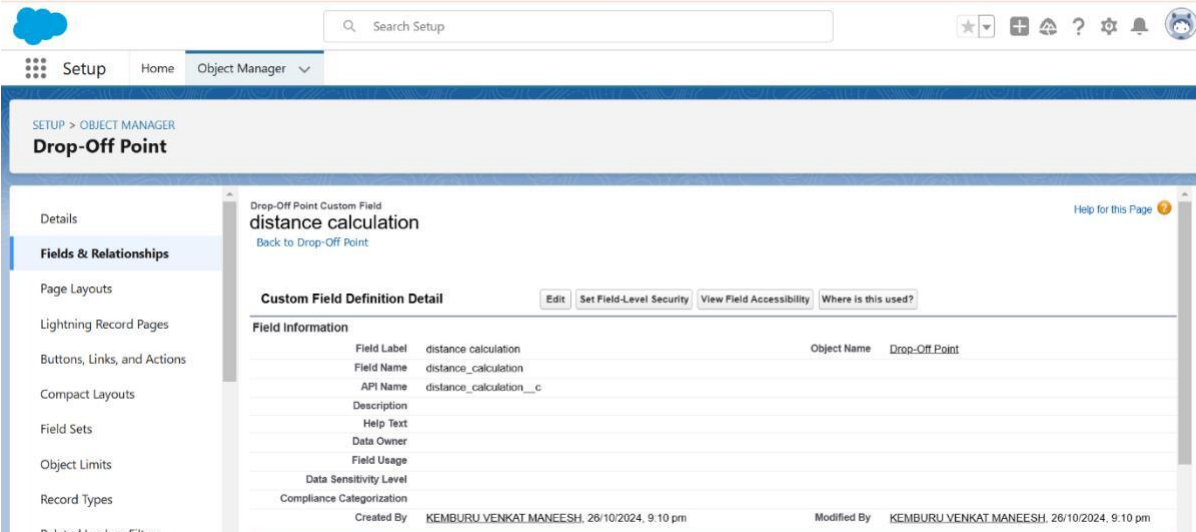
[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Custom Field Definition Detail

Field Information

Field Label	Location 2	Object Name	Drop-Off Point
Field Name	Location_2	Data Type	Geolocation
API Name	Location_2__c		
Description	Enter the Geolocation of the Drop off Point		
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 6:51 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 7:32 pm

distance Calculation



Setup > OBJECT MANAGER

Drop-Off Point

Details

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distance calculation

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Custom Field Definition Detail

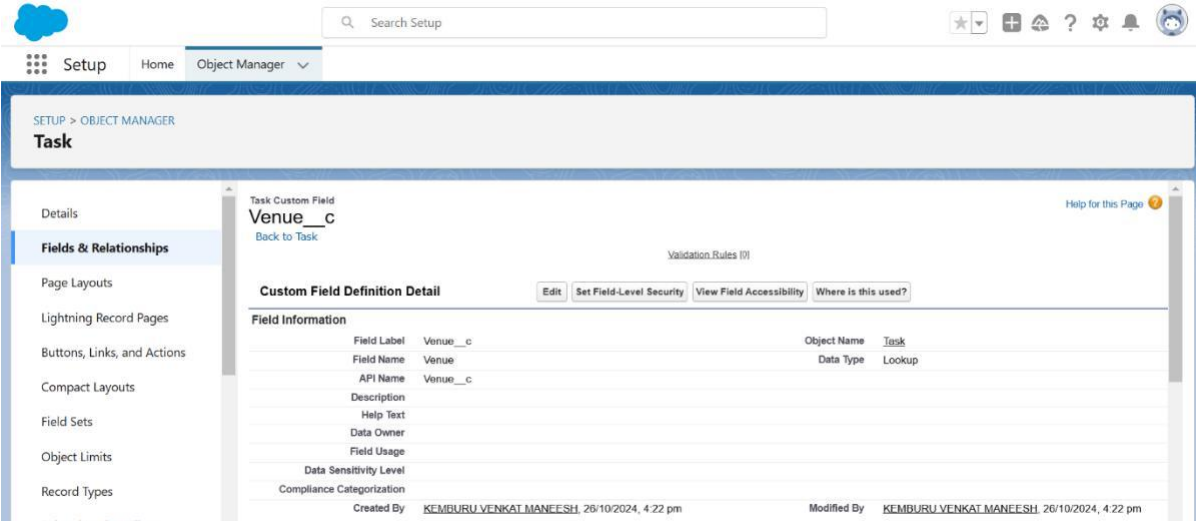
[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	distance calculation	Object Name	Drop-Off Point
Field Name	distance_calculation		
API Name	distance_calculation__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 9:10 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 9:10 pm

Creation of Fields for the Task Object

Venue__c



Setup > OBJECT MANAGER

Task

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Task Custom Field

Venue__c

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Custom Field Definition Detail

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Field Information

Field Label	Venue__c	Object Name	Task
Field Name	Venue	Data Type	Lookup
API Name	Venue__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 4:22 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 4:22 pm

Feedback



Setup Home Object Manager

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Task

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Task Custom Field
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[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Feedback	Object Name	Task
Field Name	Feedback	Data Type	Long Text Area
API Name	Feedback__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT.MANEESH, 26/10/2024, 9:57 pm	Modified By	KEMBURU VENKAT.MANEESH, 26/10/2024, 9:57 pm

Rating



Setup Home Object Manager

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Task Custom Field
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[Validation Rules \(0\)](#)

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Rating	Object Name	Task
Field Name	Rating	Data Type	Picklist
API Name	Rating__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT.MANEESH, 26/10/2024, 9:55 pm	Modified By	KEMBURU VENKAT.MANEESH, 26/10/2024, 9:55 pm

Sponsored By



Setup Home Object Manager

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Task Custom Field
Sponsored By
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Validation Rules (0)

[Edit](#)
[Set Field-Level Security](#)
[View Field Accessibility](#)
[Where is this used?](#)

Field Information		Object Name	Task
Field Label	Sponsored By		
Field Name	Sponsored_By		
API Name	Sponsored_By__c	Data Type	Lookup
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 4:29 pm		Modified By KEMBURU VENKAT MANEESH, 26/10/2024, 4:29 pm

Task Name



Setup Home Object Manager

SETUP > OBJECT MANAGER
Task

Details
 Fields & Relationships
 Page Layouts
 Lightning Record Pages
 Buttons, Links, and Actions
 Compact Layouts
 Field Sets
 Object Limits
 Record Types
 Related Lookup Filters

Task Field
Task Name
[Back to Task](#)


[Set Field-Level Security](#)
[View Field Accessibility](#)

Field Information		Field Name	Name
Field Label	Task Name		
Data Type	Text(80)		
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Validation Rules
[New](#)
[Validation Rules Help](#)

No validation rules defined.

Task ID



Setup Home Object Manager

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Task Custom Field
Task ID
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Help for this Page

Custom Field Definition Detail
 Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Task ID	Object Name	Task
Field Name	Task_ID	Data Type	Auto Number
API Name	Task_ID__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 9:40 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 9:40 pm

Phone



Setup Home Object Manager

SETUP > OBJECT MANAGER
Task

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Task Custom Field
Phone
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Validation Rules [0]
 Help for this Page

Custom Field Definition Detail
 Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Phone	Object Name	Task
Field Name	Phone	Data Type	Phone
API Name	Phone__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 9:54 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 9:54 pm

Number of People Served



Setup Home Object Manager

SETUP > OBJECT MANAGER
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Task Custom Field
Number of People Served
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Validation Rules (0)

Custom Field Definition Detail
 [Edit](#)
[Set Field-Level Security](#)
[View Field Accessibility](#)
[Where is this used?](#)

Field Information

Field Label	Number of People Served	Object Name	Task
Field Name	Number_of_People_Served	Data Type	Number
API Name	Number_of_People_Served__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 9:52 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 9:52 pm

Food Category



Setup Home Object Manager

SETUP > OBJECT MANAGER
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Task Custom Field
Food Category
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Validation Rules (0)

Custom Field Definition Detail
 [Edit](#)
[Set Field-Level Security](#)
[View Field Accessibility](#)
[Where is this used?](#)

Field Information

Field Label	Food Category	Object Name	Task
Field Name	Food_Category	Data Type	Picklist (Multi-Select)
API Name	Food_Category__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 9:43 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 9:43 pm

Date

Setup Home Object Manager

Search Setup

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Task Custom Field

Date

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Validation Rules (0)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Date	Object Name	Task
Field Name	Date	Data Type	Date
API Name	Date__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 9:41 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 9:41 pm

Creation of Fields for the Execution Details

Object Volunteer

Setup Home Object Manager

Search Setup

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Execution Detail

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Execution Detail Custom Field

Volunteer

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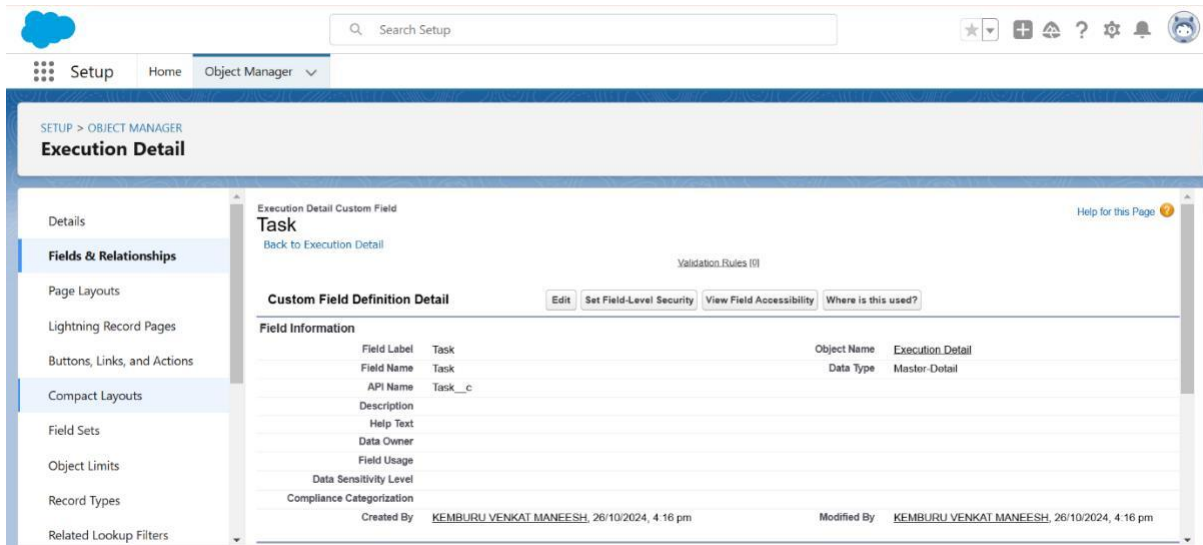
Validation Rules (0)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Volunteer	Object Name	Execution Detail
Field Name	Volunteer	Data Type	Master-Detail
API Name	Volunteer__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 4:16 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 4:16 pm

Task



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Execution Detail

Details

- Fields & Relationships**
- Page Layouts
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- Object Limits
- Record Types
- Related Lookup Filters

Execution Detail Custom Field

Task

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Validation Rules (0)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

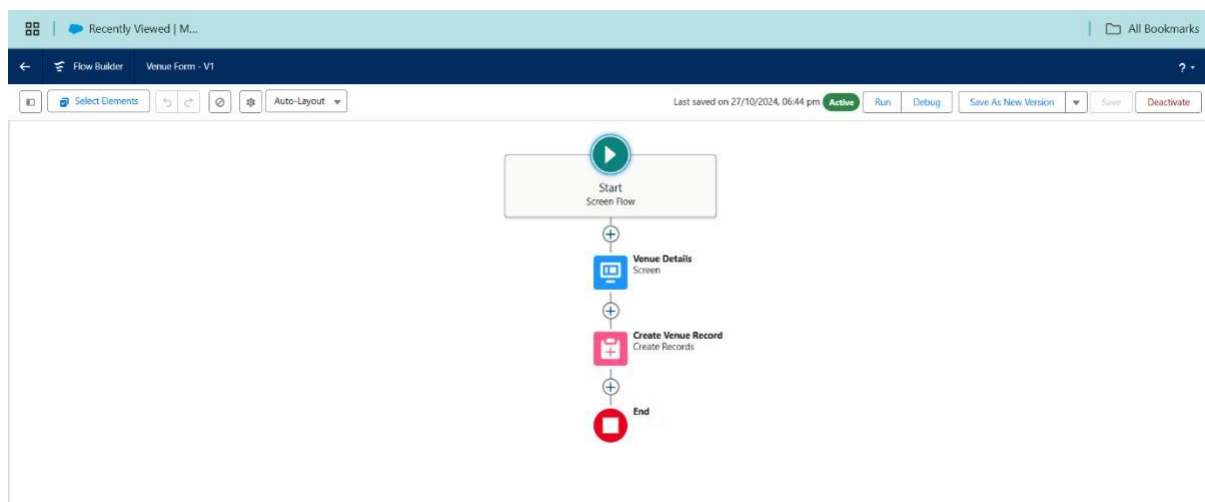
Field Label	Task	Object Name	Execution_Detail
Field Name	Task	Data Type	Master-Detail
API Name	Task__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	KEMBURU VENKAT MANEESH, 26/10/2024, 4:16 pm	Modified By	KEMBURU VENKAT MANEESH, 26/10/2024, 4:16 pm

6) Flows

What is a Flow?

Flows are automation tools that allow users to create complex business processes and workflows using a visual interface. They can automate tasks, guide users through steps, and integrate with other systems.

Flow to Create a Record in Venue Object



7) Trigger

What is a Trigger?

A trigger is a piece of Apex code that executes before or after specific database events on objects, such as insertions, updates, or deletions. Triggers are used to perform custom actions or enforce business rules.

Trigger Code

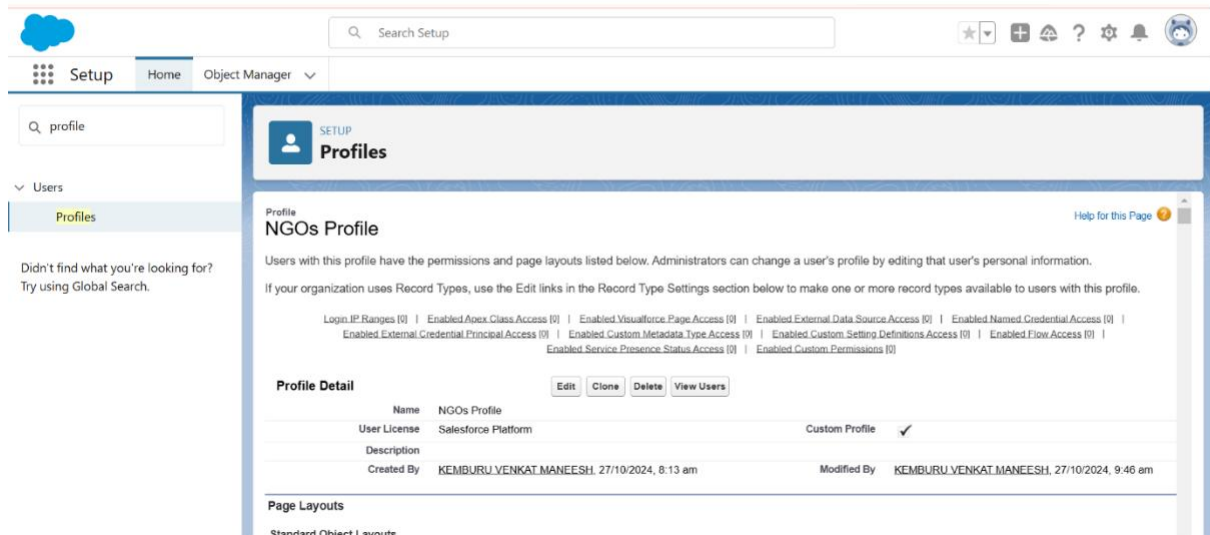


```
1 trigger DropOffTrigger on Drop_Off_point__c (before insert) {  
2  
3     for(Drop_Off_point__c Drop : Trigger.new){  
4  
5         Drop.Distance__c = Drop.distance_calculation__c;  
6     }  
7 }  
8  
9 }
```

8) Profiles

What is a Profile?

Profiles define a user's permissions and access settings, controlling what users can see and do within the application. They specify the objects, fields, and functions a user can access.



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'profile' entered and a 'Profiles' link under the 'Users' section. The main content area is titled 'Profiles' and shows the 'NGOs Profile'. It includes a list of permissions (Login, Apex, Visualforce, External Data Source, Named Credential, External Credential, Custom Metadata, Custom Setting, Flow, Service Presence Status, Custom Permissions) and a 'Profile Detail' table.

Profile Detail			
Name	NGOs Profile		
User License	Salesforce Platform	Custom Profile	✓
Description			
Created By	KEMBURU VENKAT MANEESH, 27/10/2024, 8:13 am	Modified By	KEMBURU VENKAT MANEESH, 27/10/2024, 9:46 am


Below the table, there is a 'Page Layouts' section showing 'Standard Object Layouts'.








9) Users


What is a User?

Users are individuals who have login access to the Salesforce organization. Each user has a unique username, profile, and role, determining their access levels and permissions within the system.

Iksha Foundation Iksha




Setup

Home

Object Manager

Users

Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users

SETUP

Users

User

Iksha Foundation Iksha_Foundation


[Permission Set Assignments \(0\)](#) |
[Permission Set Assignments Activation Required \(0\)](#) |
[Permission Set Group Assignments \(0\)](#) |
[Permission Set License Assignments \(0\)](#) |
[Personal Groups \(0\)](#) |
[Public Group Membership \(1\)](#) |
[Queue Membership \(0\)](#) |
[Team \(0\)](#) |
[Managers in the Role Hierarchy \(0\)](#) |
[OAuth Apps \(0\)](#) |
[Third-Party Account Links \(0\)](#) |
[Installed Mobile Apps \(0\)](#) |
[Authentication Settings for External Systems \(0\)](#) |
[Login History \(0\)](#) |
[User Provisioning Accounts \(0\)](#)








User Detail


[Edit](#) [Sharing](#) [Reset Password](#) [Login](#) [Freeze](#) [View Summary](#)

Name	Iksha Foundation Iksha_Foundation	Role	
Alias	iksh	User License	Salesforce Platform
Email	21131a0593@gvpce.ac.in [Verify]	Profile	NGOs Profile
Username	ikshafounds6@sb.com	Active	<input checked="" type="checkbox"/>
Nickname	User17299997424465039575 [i]	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>

NSS




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SETUP

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User

NSS NSS


[Permission Set Assignments \(0\)](#) |
[Permission Set Assignments Activation Required \(0\)](#) |
[Permission Set Group Assignments \(0\)](#) |
[Permission Set License Assignments \(0\)](#) |
[Personal Groups \(0\)](#) |
[Public Group Membership \(1\)](#) |
[Queue Membership \(0\)](#) |
[Team \(0\)](#) |
[Managers in the Role Hierarchy \(0\)](#) |
[OAuth Apps \(0\)](#) |
[Third-Party Account Links \(0\)](#) |
[Installed Mobile Apps \(0\)](#) |
[Authentication Settings for External Systems \(0\)](#) |
[Login History \(0\)](#) |
[User Provisioning Accounts \(0\)](#)








User Detail


[Edit](#) [Sharing](#) [Reset Password](#) [Login](#) [Freeze](#) [View Summary](#)

Name	NSS NSS	Role	
Alias	nss	User License	Salesforce Platform
Email	21131a0593@gvpce.ac.in [Verify]	Profile	NGOs Profile
Username	ikshafounds10@sb.com	Active	<input checked="" type="checkbox"/>
Nickname	User17300026127054329054 [i]	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>

Street Cause




Setup

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Prospector Users

SETUP

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User

Street Cause Street Cause

[Permission Set Assignments \(0\)](#) |
[Permission Set Assignments Activation Required \(0\)](#) |
[Permission Set Group Assignments \(0\)](#) |
[Permission Set License Assignments \(0\)](#) |
[Personal Groups \(0\)](#) |
[Public Group Membership \(1\)](#) |
[Queue Membership \(0\)](#) |
[Team \(0\)](#) |
[Managers in the Role Hierarchy \(0\)](#) |
[OAuth Apps \(0\)](#) |
[Third-Party Account Links \(0\)](#) |
[Installed Mobile Apps \(0\)](#) |
[Authentication Settings for External Systems \(0\)](#) |
[Login History \(0\)](#) |
[User Provisioning Accounts \(0\)](#)

User Detail

[Edit](#) [Sharing](#) [Reset Password](#) [Login](#) [Freeze](#) [View Summary](#)

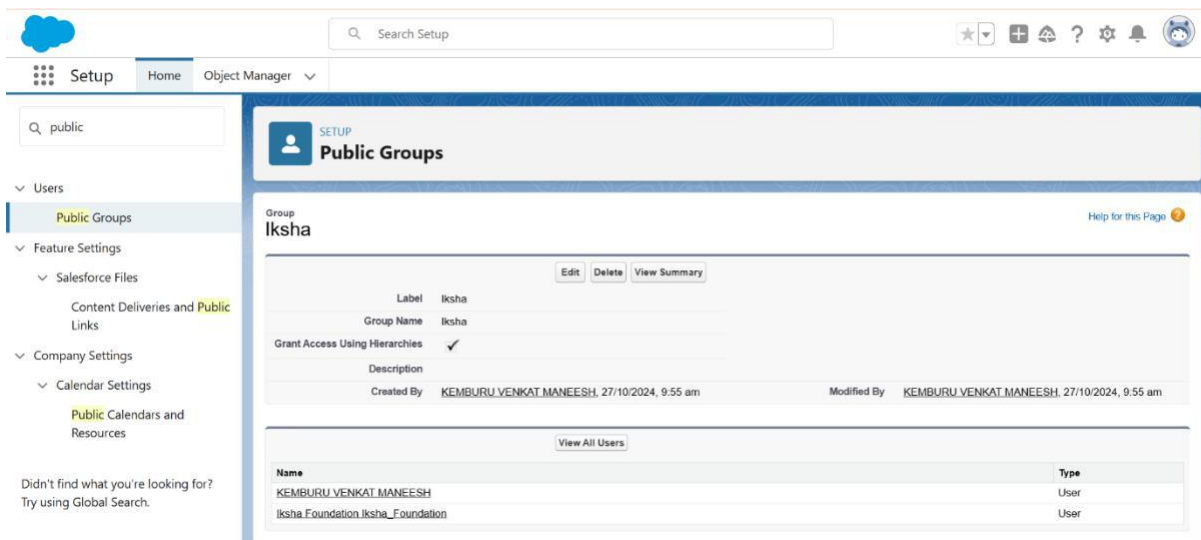
Name	Street Cause Street Cause	Role	
Alias	ssre	User License	Salesforce Platform
Email	21131a0593@gvpce.ac.in [Verify]	Profile	NGOs Profile
Username	ikshafounds30@sb.com	Active	<input checked="" type="checkbox"/>
Nickname	User1730002879314702459 [i]	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>

10) Public Groups

What is a Public Groups?

Public groups are collections of users, roles, and other groups that can be used to simplify sharing rules and access settings. They help manage data visibility and permissions across multiple users.

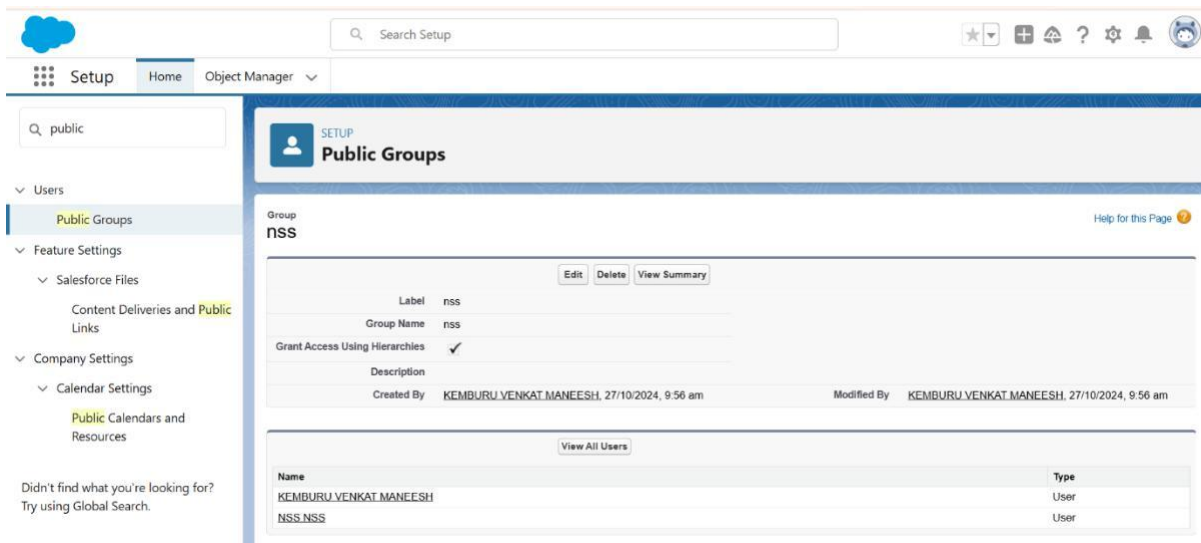
Iksha



The screenshot shows the Salesforce Setup interface for the 'Public Groups' section. The left sidebar contains a navigation menu with options like Users, Public Groups, Feature Settings, Salesforce Files, Company Settings, and Calendar Settings. The main content area displays the details for the 'Iksha' group. The group's label is 'Iksha', and its group name is also 'Iksha'. The 'Grant Access Using Hierarchies' checkbox is checked. The description is empty. The group was created by KEMBURU VENKAT MANEESH on 27/10/2024 at 9:55 am. Below the group details, there is a table listing the users in the group.

Name	Type
KEMBURU VENKAT MANEESH	User
Iksha Foundation.Iksha_Foundation	User

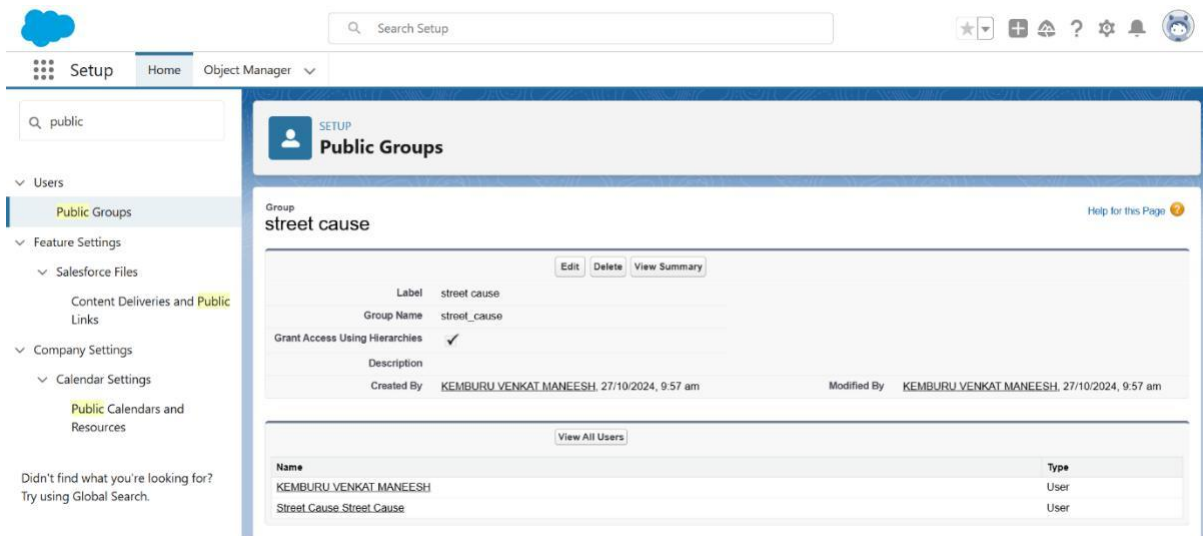
nss



The screenshot shows the Salesforce Setup interface for the 'Public Groups' section, specifically for the 'nss' group. The layout is similar to the previous screenshot, but the group name is 'nss'. The 'Grant Access Using Hierarchies' checkbox is checked. The group was created by KEMBURU VENKAT MANEESH on 27/10/2024 at 9:56 am. Below the group details, there is a table listing the users in the group.

Name	Type
KEMBURU VENKAT MANEESH	User
NSS.NSS	User

street cause



The screenshot shows the Salesforce Setup interface. On the left, the navigation menu includes Setup, Home, and Object Manager. The 'Public Groups' section is highlighted. The main content area shows the configuration for a group named 'street cause'. The group name is 'street_cause', and it has a description 'Street Cause Street Cause'. The group was created by KEMBURU VENKAT MANEESH on 27/10/2024 at 9:57 am. Below the configuration, there is a table showing the group's members:

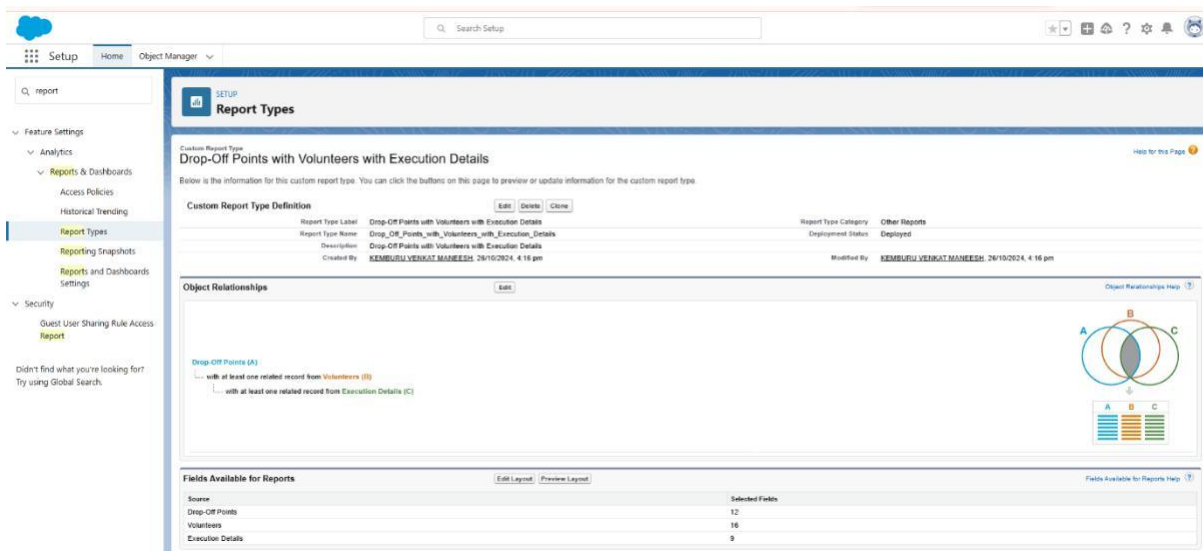
Name	Type
KEMBURU VENKAT MANEESH	User
Street.Cause.Street.Cause	User

11) Report Types

What is a Report Type?

Report types define the set of records and fields available for a report. They determine which objects, and their relationships can be included, allowing users to create customized reports based on specific criteria.

Venue with DropOff with Volunteer



The screenshot shows the Salesforce Setup interface for Report Types. The main content area displays the configuration for a custom report type named 'Drop-Off Points with Volunteers with Execution Details'. The report type is categorized as 'Other Reports' and is currently 'Deployed'. The report type definition includes the following fields:

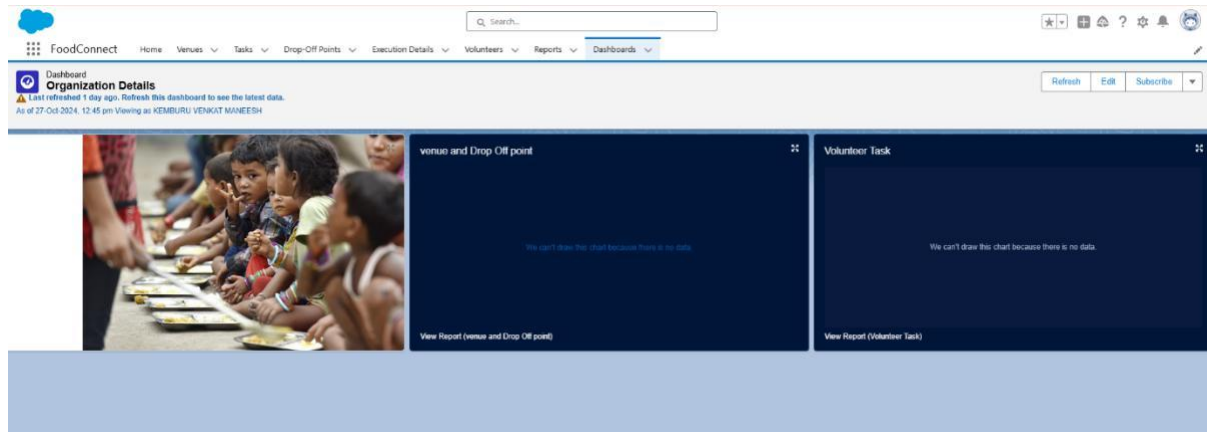
Field	Source	Selected Fields
Drop-Off Points	Drop-Off Points	12
Volunteers	Volunteers	16
Execution Details	Execution Details	9

The 'Object Relationships' section shows a diagram illustrating the relationships between the three objects: Drop-Off Points (A), Volunteers (B), and Execution Details (C). The diagram shows that A and B are related, and B and C are related, but A and C are not directly related.

12) Dashboards

What is a Dashboard?

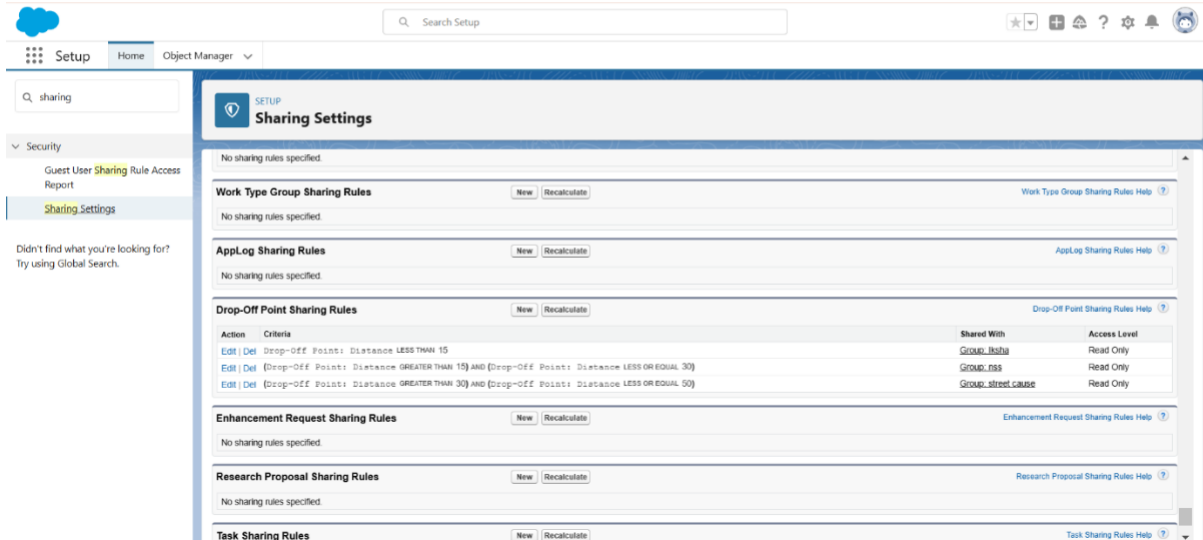
Dashboards are visual displays of key metrics and reports, providing a snapshot of business performance. They consist of multiple components like charts, graphs, and tables, offering insights and data visualization for decision-making.



13) Sharing Rules

What is a Sharing Rule?

sharing rules are used to extend access to records to users in public groups or roles. They allow administrators to define additional criteria for sharing records beyond what is granted by default through profiles and roles, ensuring appropriate data access across the organization.



The screenshot shows the Salesforce Setup interface with the 'Sharing Settings' page selected. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays various sharing rule categories, each with a 'New' and 'Recalculate' button. The 'Drop-Off Point Sharing Rules' section is expanded, showing a table of rules with columns for Action, Criteria, Shared With, and Access Level.

Action	Criteria	Shared With	Access Level
Edit Del	Drop-Off Point: Distance LESS THAN 15	Group: Baha	Read Only
Edit Del	(Drop-Off Point: Distance GREATER THAN 15) AND (Drop-Off Point: Distance LESS OR EQUAL 30)	Group: res	Read Only
Edit Del	(Drop-Off Point: Distance GREATER THAN 30) AND (Drop-Off Point: Distance LESS OR EQUAL 50)	Group: street cause	Read Only

5. Testing and Validation

To ensure the robustness of the system, the project incorporated multiple layers of testing:

- **Unit Testing:** For Apex classes and triggers, confirming all business logic performed as expected.
- **User Interface Testing:** Conducted to ensure a smooth and user-friendly experience, especially for mobile field agents updating delivery statuses.

6. Key Scenarios Addressed by Salesforce in the Implementation Project

The project handles various real-life scenarios:

- Automated matching of food donations based on location and urgency.
- Real-time status updates for field agents during deliveries.
- Detailed reporting to track and evaluate donation efficiency, volunteer participation, and overall impact.

7. Conclusion

Summary of Achievements: This project successfully created a streamlined and transparent system for managing surplus food donations, reducing food waste, and addressing hunger. Through efficient coordination of donations and volunteer efforts, the solution maximized the positive impact on food security for underserved communities.

