

FoodConnect Salesforce Setup and Customization Documentation

Introduction

The FoodConnect project is an initiative aimed at redistributing leftover food to those in need. This Salesforce implementation serves as the backbone of the FoodConnect app, enabling efficient management of venues, volunteers, tasks, execution details, and drop-off points. The system leverages Salesforce's robust CRM features, custom objects, fields, relationships, and flow automation to streamline operations and ensure that food is delivered effectively to the intended recipients.

Custom Objects Creation

To meet the specific needs of the FoodConnect app, several custom objects were created in Salesforce. These objects include **Venue**, **Volunteers**, **Tasks**, **Execution Details**, and **Drop-Off Points**. Each of these objects has a tailored set of fields and relationships to capture relevant data.

The creation process for these objects involved navigating to the Object Manager within Salesforce, selecting 'Create' and then 'Custom Object.' For instance, the Venue object was set up with "Venue Name" as the Record Name, and it was configured to allow reporting, activity tracking, and search functionality. The same process was followed to create the other objects, ensuring consistency and data integrity across the system.

1. Venue

- **Label:** Venue
- **Plural Label:** Venues
- **Record Name:** Venue Name (Text)
- **Fields:**
 - **Contact Email:** Email (Required)
 - **Contact Phone:** Phone (Required)
 - **Location:** Geolocation (Decimal Places: 4)
 - **Venue Location:** Long Text Area

<div> <div> <div>SETUP > OBJECT MANAGER</div> <div>Venue</div> </div> </div>					
Details	<div> <div>Fields & Relationships</div> <div>8 Items, Sorted by Field Label</div> <div> <div>Q, Quick Find</div> <div>New</div> <div>Deleted Fields</div> <div>Field Dependencies</div> <div>Set History Tracking</div> </div> </div>				
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Contact Email	Contact_Email__c	Email		<input type="checkbox"/>
Lightning Record Pages	Contact Phone	Contact_Phone__c	Phone		<input type="checkbox"/>
Buttons, Links, and Actions	Created By	CreatedById	Lookup(User)		
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)		
Field Sets	Location	Location__c	Geolocation		<input type="checkbox"/>
Object Limits	Owner	OwnerId	Lookup(User.Group)		<input checked="" type="checkbox"/>
Record Types	Venue Location	Venue_Location__c	Long Text Area(32768)		<input type="checkbox"/>
Related Lookup Filters	Venue Name	Name	Text(80)		<input checked="" type="checkbox"/>
Search Layouts					
List View Button Layout					
Restriction Rules					

2. Volunteer

- **Label:** Volunteer
- **Plural Label:** Volunteers
- **Record Name:** Volunteer Name (Text)
- **Fields:**
 - **Volunteer ID:** Auto Number
 - **Gender:** Picklist (Male, Female, Other)

<div> <div> <div>SETUP > OBJECT MANAGER</div> <div>Volunteer</div> </div> </div>					
Details	<div> <div>Fields & Relationships</div> <div>13 Items, Sorted by Field Label</div> <div> <div>Q, Quick Find</div> <div>New</div> <div>Deleted Fields</div> <div>Field Dependencies</div> <div>Set History Tracking</div> </div> </div>				
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Address	Address__c	Long Text Area(32768)		<input type="checkbox"/>
Lightning Record Pages	Age	Age__c	Number(18, 0)		<input type="checkbox"/>
Buttons, Links, and Actions	Available On	Available_On__c	Date		<input type="checkbox"/>
Compact Layouts	Contact Number	Contact_Number__c	Number(18, 0)		<input type="checkbox"/>
Field Sets	Created By	CreatedById	Lookup(User)		
Object Limits	Date of Birth	Date_of_Birth__c	Date		<input type="checkbox"/>
Record Types	Drop-Off Point	Drop_Off_Point__c	Master-Detail(Drop-Off Point)		<input checked="" type="checkbox"/>
Related Lookup Filters	Email	Email__c	Email		<input type="checkbox"/>
Search Layouts	Gender	Gender__c	Picklist		<input type="checkbox"/>
List View Button Layout					
Restriction Rules					
Scoping Rules					

SETUP > OBJECT MANAGER

Volunteer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Fields & Relationships

13 Items, Sorted by Field Label

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

Contact Number	Contact_Number__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Date of Birth	Date_of_Birth__c	Date		
Drop-Off Point	Drop_Off_Point__c	Master-Detail(Drop-Off Point)	✓	
Email	Email__c	Email		
Gender	Gender__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner Name	Owner_Name__c	Text(20)		
Volunteer ID	Volunteer_ID__c	Auto Number		
Volunteer Name	Name	Text(80)	✓	

3. Task

- **Label:** Task
- **Plural Label:** Tasks
- **Record Name:** Task Name (Text)
- **Fields:**
 - **Task ID:** Auto Number (TASK-{0})
 - **Distance:** Number (14,4) (Required)
 - **Date:** Date (Required)
 - **Food Category:** Picklist (Multi-Select) (Veg, Non-Veg, Salad, Snack) (Required)
 - **Number of People Served:** Number (Required)
 - **Name of the Person:** Text
 - **Phone:** Phone
 - **Rating:** Picklist (1, 2, 3, 4, 5)
 - **Feedback:** Long Text Area

Setup Home Object Manager

SETUP > OBJECT MANAGER

Task

Details

Fields & Relationships

16 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Date	Date__c	Date		
Drop-Off Point	Drop_Off_Point__c	Lookup(Drop-Off Point)		✓
Feedback	Feedback__c	Long Text Area(32768)		
Food Category	Food_Category__c	Picklist (Multi-Select)		
Last Modified By	LastModifiedById	Lookup(User)		
Name of the Person	Name_of_the_Person__c	Text(20)		
Number of People Served	Number_of_People_Served__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓

SETUP > OBJECT MANAGER

Task

Details

Fields & Relationships

16 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Number of People Served	Number_of_People_Served__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
Rating	Rating__c	Picklist		
Sponsored By	Sponsored_By__c	Lookup(Venue)		✓
Task ID	Task_ID__c	Auto Number		
Task Name	Name	Text(80)		✓
Venue__c	Venue__c	Lookup(Drop-Off Point)		✓
Volunteer	Volunteer__c	Lookup(Volunteer)		✓

4. Execution Details

- **Label:** Execution Details
- **Plural Label:** Execution Details
- **Record Name:** Execution Detail Name (Text)
- **Fields:** Add fields as needed for execution details.

Setup > OBJECT MANAGER

Execution Detail

Details

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Execution Detail Name	Name	Text(80)		✓
Execution ID	Execution_ID__c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Task	Task__c	Master-Detail(Task)		✓
Volunteer	Volunteer__c	Lookup(Volunteer)		✓

5. Drop-Off Point

- **Label:** Drop-Off Point
- **Plural Label:** Drop-Off Points
- **Record Name:** Drop-Off Point Name (Text)
- **Fields:**
 - **Location:** Geolocation (Decimal Places: 4)
 - **State:** Picklist (List of States)
 - **Distance Calculation:** Formula (Number) - `DISTANCE(Location_2__c, Venue__r.Location__c, 'km')`

Setup > OBJECT MANAGER

Drop-Off Point

Details

Fields & Relationships

9 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Distance	Distance__c	Number(14, 4)		
distance calculation	distance_calculation__c	Formula (Number)		
Drop-Off Point Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Location 2	Location_2__c	Geolocation		
Owner	OwnerId	Lookup(User,Group)		✓
State	State__c	Picklist		
Venue	Venue__c	Lookup(Venue)		✓

Custom Tabs Creation

To facilitate easy access to the newly created objects, corresponding custom tabs were created in Salesforce. These tabs serve as entry points for users to interact with the data stored within each object.

The process involved navigating to the Tabs setup section, selecting 'New' under the Custom Object Tabs, and choosing the appropriate object (e.g., Venue). After selecting a suitable tab style, the tabs were added to the profiles and apps as needed. Care was taken to ensure that the tabs were available to the appropriate user profiles while also maintaining customization flexibility.

To Create custom tabs for each object:

1. **Venue Tab**
2. **Volunteer Tab**
3. **Task Tab**
4. **Execution Details Tab**
5. **Drop-Off Point Tab**

Relationships

To establish meaningful connections between the different objects, several relationship fields were created. These include both Lookup and Master-Detail relationships, which enable the system to link related records across objects.

For example, a Master-Detail relationship was created on the Volunteer object to associate it with the Drop-Off Point object. This relationship allows for easy tracking of which volunteers are assigned to which drop-off points. Similarly, the Execution Details object was linked to the Volunteer and Task objects, ensuring that execution plans are tightly integrated with the people and tasks involved.

Volunteer Object

- **Master-Detail Relationship:** Drop-Off Point

Execution Details Object

- **Master-Detail Relationship:** Volunteer
- **Master-Detail Relationship:** Task

Drop-Off Point Object

- **Lookup Relationship:** Venue

Task Object

- **Lookup Relationship:** Venue
- **Lookup Relationship:** Drop-Off Point

Lightning App Page Creation

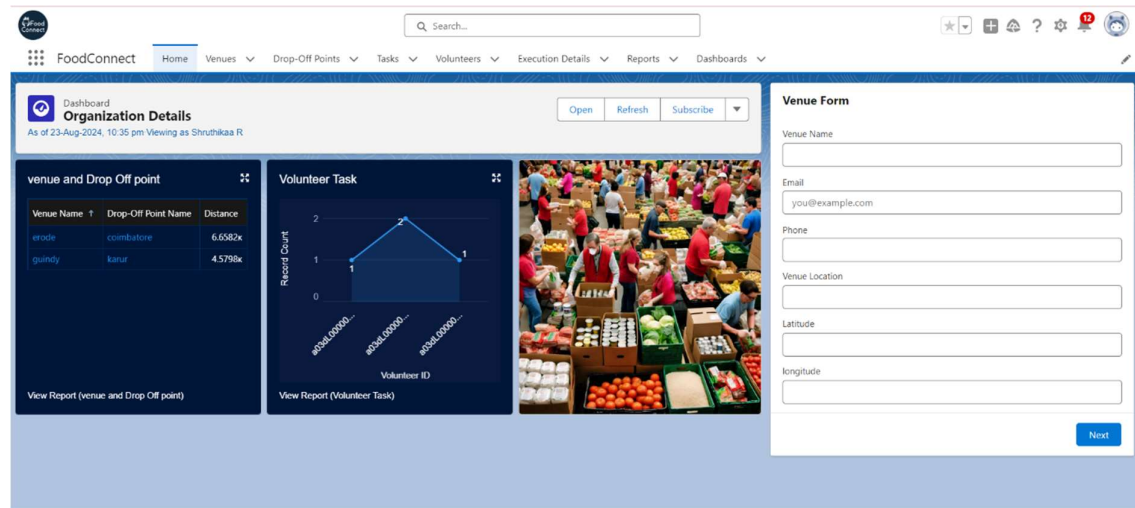
A Lightning app named **FoodConnect** was created to provide a user-friendly interface for managing the various aspects of the project. This app serves as the central hub where users can access different components such as Home, Venue, Drop-Off Point, Task, Volunteer, Execution Details, and Reports.

The app was configured with standard navigation and default utility items. Navigation items were carefully selected to include all relevant objects, ensuring that users can easily find and interact with

the data they need. The app was also assigned to the System Administrator profile, allowing for seamless management and oversight.

FoodConnect Lightning App

- **App Name:** FoodConnect
- **Navigation Items:** Home, Venue, Drop-Off Point, Task, Volunteer, Execution Details, Reports
- **User Profiles:** System Administrator



Custom Fields Creation

Each custom object was populated with fields tailored to capture the necessary data for the FoodConnect project. For the Venue object, fields such as Contact Email, Contact Phone, Location (Geolocation), and Venue Location (Long Text Area) were created to store venue-specific details.

Similar fields were created for the other objects, including Drop-Off Points, Tasks, Volunteers, and Execution Details. For instance, the Task object includes fields like Food Category (Picklist), Number of People Served (Number), and Feedback (Long Text Area) to capture details related to each food distribution task.

Venue Object Fields

1. **Contact Email**
 - Type: Email
 - Required: Yes
2. **Contact Phone**
 - Type: Phone
 - Required: Yes
3. **Location**
 - Type: Geolocation

- Decimal Places: 4

4. Venue Location

- Type: Long Text Area

The screenshot shows the 'New Venue' form in the FoodConnect application. The form is titled 'New Venue' and includes a search bar at the top. It has sections for 'Information' and 'Location'. The 'Information' section contains fields for 'Venue Name', 'Contact Email', and 'Contact Phone', all marked as required. The 'Location' section contains fields for 'Latitude', 'Longitude', and 'Venue Location'. The 'Venue Location' field is a long text area. At the bottom of the form are buttons for 'Cancel', 'Save & New', and 'Save'. The background shows the 'Venues' list with 'Recently Viewed' items: 'erode' and 'guindy'.

Drop-Off Point Object Fields

1. Location

- Type: Geolocation
- Decimal Places: 4

2. State

- Type: Picklist
- Values: List of Indian States

3. Distance Calculation

- Type: Formula (Number)
- Formula: `DISTANCE(Location_2__c, Venue__r.Location__c, 'km')`

New Drop-Off Point

* Required Information

Information

* Drop-Off Point Name

Owner Shruthikaa R

Location 2

Latitude

Longitude

Venue Search Venues...

* State

Distance

Task Object Fields

1. Task ID

- Type: Auto Number
- Display Format: TASK-{0}
- Required: Yes

2. Distance

- Type: Number
- Length: 14
- Decimal Places: 4
- Required: Yes

3. Date

- Type: Date
- Required: Yes

4. Food Category

- Type: Picklist (Multi-Select)
- Values: Veg, Non-Veg, Salad, Snack
- Required: Yes

5. Number of People Served

- Type: Number
- Required: Yes

6. Name of the Person

- Type: Text

7. Phone

- Type: Phone

8. Rating

- Type: Picklist
- Values: 1, 2, 3, 4, 5

9. Feedback

- Type: Long Text Area


New Task

* = Required Information


Information

* Task Name


Owner

 Shruthikaa R


Venue__c

Search Drop-Off Points... 

Sponsored By


Search Venues... 

Drop-Off Point

Search Drop-Off Points... 

Task ID

* Date



* Food Category

Available

Veg

Chosen

Cancel

Save & New

Save

*** Food Category**

Available

Veg

Non-Veg

Salad

Snack

Chosen

*** Number of People Served**

Name of the Person

Phone

Rating

--None--

Feedback

Volunteer

Cancel Save & New Save

Volunteer Object Fields

1. Volunteer ID

- Type: Auto Number

2. Gender

- Type: Picklist
- Values: Male, Female, Other

New Volunteer

* = Required Information

Information

* Volunteer Name

* Drop-Off Point



Volunteer ID

Gender

* Available On



* Age

* Email

Cancel

Save & New

Save

* Contact Number

* Available On



* Age

* Email

* Contact Number

Address

Date of Birth



Owner Name

Cancel

Save & New

Save

Reports Creation

Home

Venues

Drop-Off Points

Tasks

Volunteers

Execution Details

Reports

Dashboards

Search...

★

+

🔍

⚙️

👤

Reports

Created by Me

2 items

Search reports created by me...

New Report

New Folder

⚙️

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	venue and Drop Off point		Custom Reports	Shruthikaa R	31/7/2024, 6:29 pm	<input type="checkbox"/>
Created by Me	Volunteer task		Custom Reports	Shruthikaa R	1/8/2024, 11:41 am	<input type="checkbox"/>

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

1. Venue and Drop off point

FoodConnect

HomeVenuesDrop-Off PointsTasksVolunteersExecution DetailsReportsDashboards

Report: Venue with Drop-Off with Volunteer

venue and Drop Off point

Enable Field Editing

Add Chart

Edit

Total Records2

Total Distance11,237.9532

<input type="checkbox"/> Volunteer Name	Venue Name	Drop-Off Point Name	Distance
<input type="checkbox"/> ashu (1)	erode	coimbatore	6,658.1581
Subtotal			6,658.1581
<input type="checkbox"/> prathav (1)	guindy	karur	4,579.7951
Subtotal			4,579.7951
Total (2)			11,237.9532

2. Volunteer Task



Report: Volunteers with Execution Details and Tasks

Enable Field Editing

Total Records
4

Volunteer ID	Volunteer Name	Task Name	Execution Detail Name	Owner Name	Date	Rating
<input type="checkbox"/> a03dL0000071Gb1 (1)	prathiv	-	-	Shruthikaa	-	-
Subtotal						
<input type="checkbox"/> a03dL0000071P1x (2)	Aventhu	Food Distribution	Donate	Shruthikaa	30/08/2024	5
	Aventhu	Snack Distribution	-	Shruthikaa	04/09/2024	5
Subtotal						
<input type="checkbox"/> a03dL000007BjU1 (1)	ashu	-	-	Shruthikaa	-	-
Subtotal						
Total (4)						

Dashboard



Dashboards

Created by Me

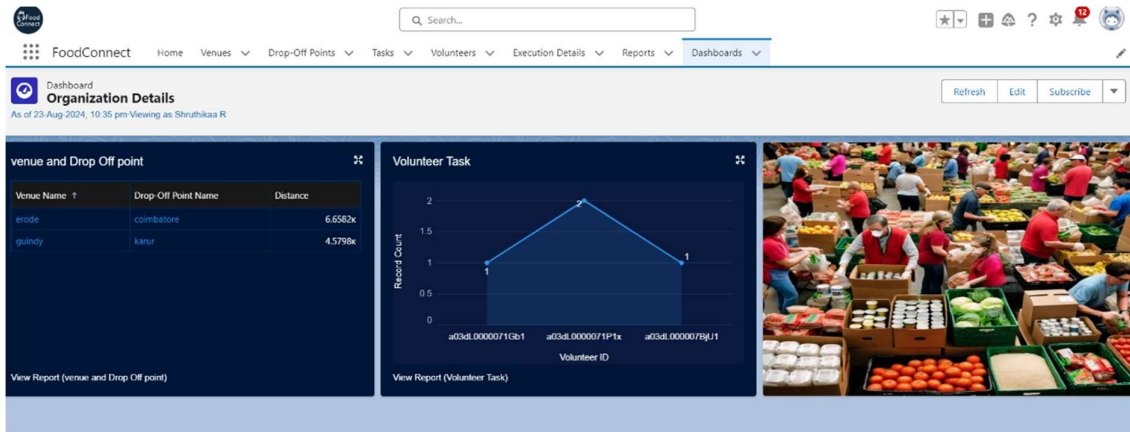
Search dashboards created by me

New Dashboard

New Folder

1 item

DASHBOARD	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Organization Details		Custom Dashboards	Shruthikaa R	1/8/2024, 11:43 am	
Created by Me						
Private Dashboards						
All Dashboards						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						



Conclusion

The Salesforce implementation for FoodConnect represents a comprehensive solution to managing the distribution of leftover food. Through the use of custom objects, fields, relationships, tabs, and automation, the system is designed to be both robust and user-friendly.