

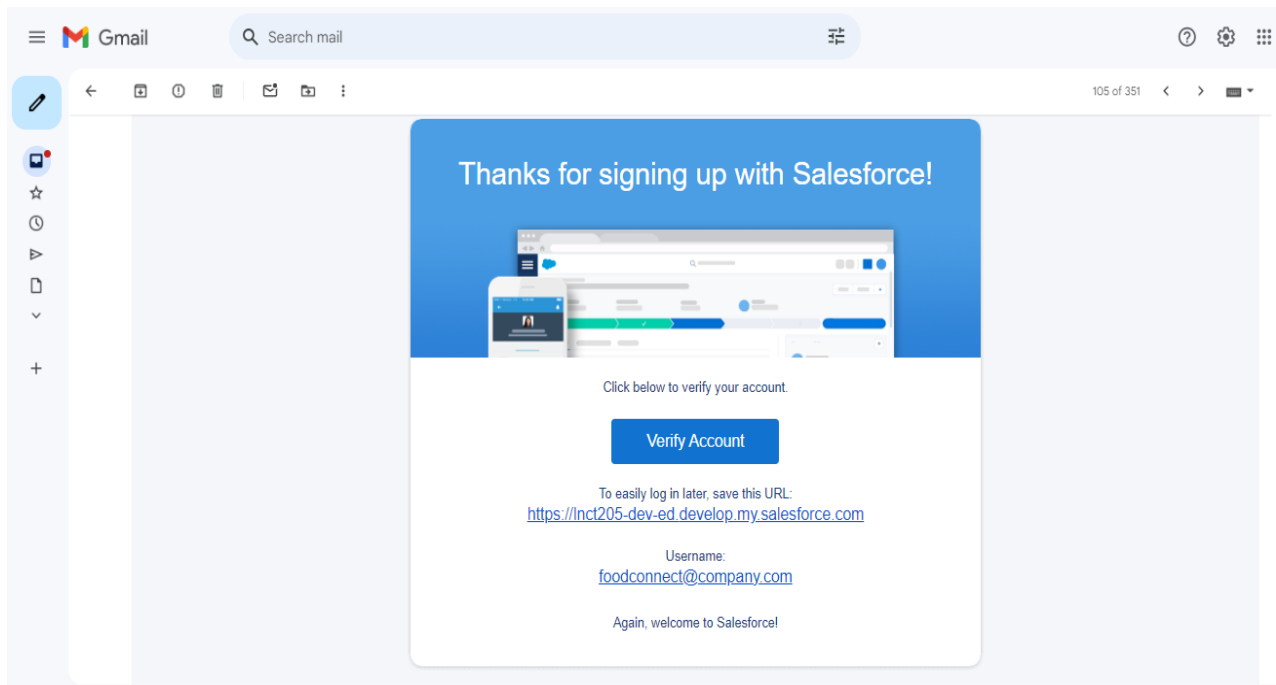
To Supply Leftover Food to Poor

1) Introduction to Salesforce

What is Salesforce?

Salesforce is a cloud-based customer relationship management (CRM) platform that helps businesses manage sales, customer service, and marketing operations. It provides tools for automation, analytics, and customer engagement.

Account Activation



2) Object

What is an Object?

An object is a database table that stores data specific to an organization. Objects can be standard (like Accounts and Contacts) or custom, created to meet specific business needs.


Create Venue Object

The screenshot shows the Salesforce Setup interface for the 'Venue' object. The left sidebar contains a navigation menu with options: 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, and Restriction Rules. The main content area is titled 'Details' and includes a description field, API Name (Venue__c), Custom checkbox (checked), Singular Label (Venue), Plural Label (Venues), Enable Reports checkbox (checked), Track Activities checkbox (checked), Track Field History checkbox (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Edit and Delete buttons are visible in the top right corner.







Create Drop-off Point Object

The screenshot shows the Salesforce Setup interface for the 'Drop-Off Point' object. The left sidebar contains a navigation menu with options: 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, and Restriction Rules. The main content area is titled 'Details' and includes a description field, API Name (Drop_Off_Point__c), Custom checkbox (checked), Singular Label (Drop-Off Point), Plural Label (Drop-Off Points), Enable Reports checkbox (checked), Track Activities checkbox (checked), Track Field History checkbox (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Edit and Delete buttons are visible in the top right corner.

Create Task Object



Search Setup



SetupHomeObject 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

Search Layouts

List View Button Layout

Restriction Rules

Details

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

EditDelete

Create Volunteer Object



Search Setup



SetupHomeObject 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

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

EditDelete

Create Execution Details Object



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER
Execution Detail

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Details

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

EditDelete

3) Tabs

What is a Tab?

Tabs are user interface elements that allow users to access different objects, features, and tools within the application. They provide a way to navigate and manage data related to specific objects or functions.

Create Venues Tab

The screenshot shows the 'Venues' custom tab configuration page. The left sidebar contains a search bar with 'tabs' and a 'User Interface' section with 'Rename Tabs and Labels' and 'Tabs' options. The main content area is titled 'Venues' and includes a 'Help for this Page' link. Below the title, it states: 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' section includes an 'Edit' button and a 'Delete' button. The details are as follows:


Tab Label	Venues	Tab Style	Airplane
Object	Venue	Splash Page Custom Link	
Description			
Created By	Simran Kataria	Modified By	Simran Kataria
	07/08/2024, 12:52 pm		07/08/2024, 12:52 pm

Create Drop-Off Points Tab

The screenshot shows the 'Drop-Off Points' custom tab configuration page. The left sidebar contains a search bar with 'tabs' and a 'User Interface' section with 'Rename Tabs and Labels' and 'Tabs' options. The main content area is titled 'Drop-Off Points' and includes a 'Help for this Page' link. Below the title, it states: 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' section includes an 'Edit' button and a 'Delete' button. The details are as follows:

Tab Label	Drop-Off Points	Tab Style	Alarm clock
Object	Drop-Off Point	Splash Page Custom Link	
Description			
Created By	Simran Kataria	Modified By	Simran Kataria
	07/08/2024, 12:55 pm		07/08/2024, 12:55 pm

Create Tasks Tabs



Search Setup

Setup

Home

Object Manager

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
Tasks

Help for this Page


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

Custom Tab Definition Detail

EditDelete

Tab Label	Tasks	Tab Style	Balls
Object	Task	Splash Page Custom Link	
Description			
Created By	Simran Kataria 07/08/2024, 12:58 pm	Modified By	Simran Kataria 07/08/2024, 12:58 pm

Create Volunteers Tab



Search Setup

Setup

Home

Object Manager

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







EditDelete

Tab Label	Volunteers	Tab Style	Ball
Object	Volunteer	Splash Page Custom Link	
Description			
Created By	Simran Kataria 07/08/2024, 12:57 pm	Modified By	Simran Kataria 07/08/2024, 12:57 pm

Create Execution Details Tab



Search Setup



SetupHomeObject Manager

Q 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


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

EditDelete

Tab Label	Execution Details	Tab Style	 Apple
Object	Execution Detail	Splash Page Custom Link	
Description			
Created By	Simran Kataria 07/08/2024, 12:58 pm	Modified By	Simran Kataria 07/08/2024, 12:58 pm

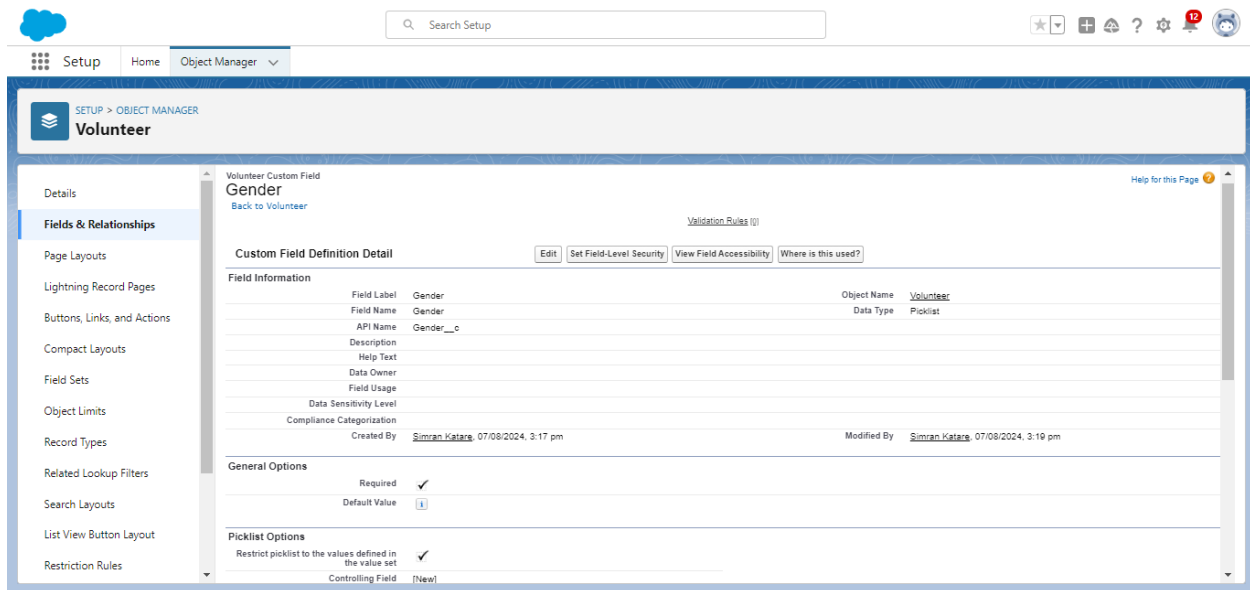
javascriptsrcUp[%27%2F01rdM000008cibM%3Fsetupid%3DCustomTabs%26isdtp%3Dp1%27];

4) 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



The screenshot shows the Salesforce Setup interface for creating a custom field for the Volunteer object. The field is named "Gender" and is of type "Picklist". The field information section shows the field label as "Gender", field name as "Gender", and API name as "Gender__c". The field is required and has a default value of "I". The picklist options section shows the field is restricted to the values defined in the value set, with a controlling field of "New".

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

Validation Rules ⓘ

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

Field Information

Field Label	Gender	Object Name	Volunteer
Field Name	Gender	Data Type	Picklist
API Name	Gender__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Simran Katana, 07/08/2024, 3:17 pm	Modified By	Simran Katana, 07/08/2024, 3:19 pm

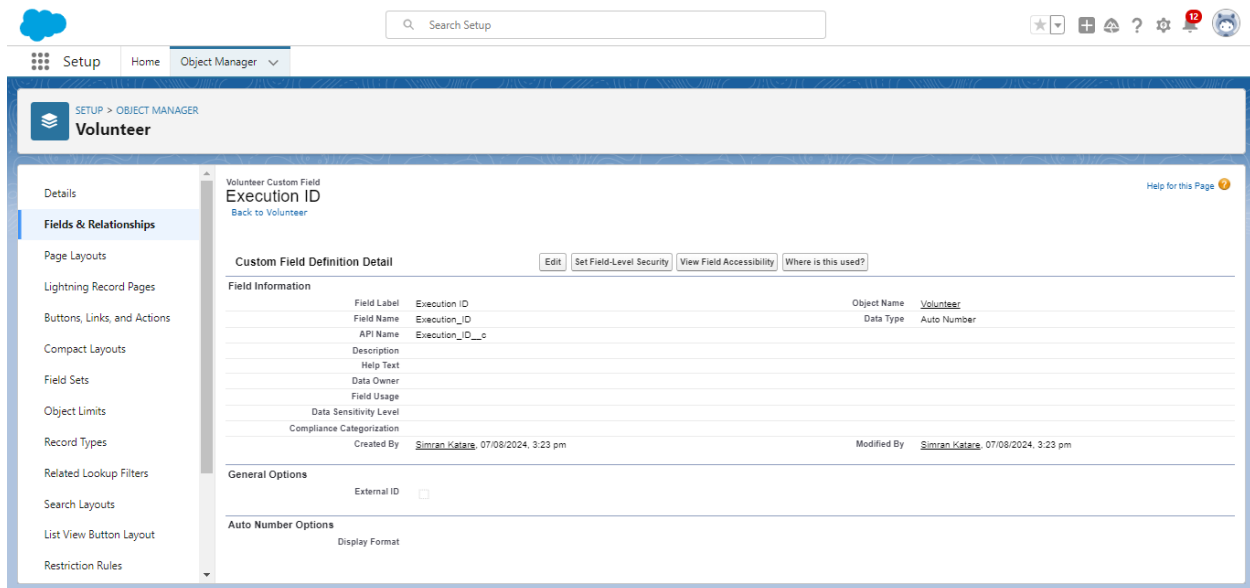
General Options

Required	<input checked="" type="checkbox"/>
Default Value	I

Picklist Options

Restrict picklist to the values defined in the value set	<input checked="" type="checkbox"/>
Controlling Field	(New)

Create Execution Details Tab



The screenshot shows the Salesforce Setup interface for creating a custom field for the Volunteer object. The field is named "Execution ID" and is of type "Auto Number". The field information section shows the field label as "Execution ID", field name as "Execution_ID", and API name as "Execution_ID__c". The field is not required and has no default value. The auto number options section shows the field is not an external ID and has no display format.

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	Simran Katana, 07/08/2024, 3:23 pm	Modified By	Simran Katana, 07/08/2024, 3:23 pm

General Options

External ID	<input type="checkbox"/>
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Auto Number Options

Display Format	
----------------	--

Date Of Birth

Setup

Home

Object Manager

Search Setup

12

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

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	Simran Katara, 07/08/2024, 3:22 pm	Modified By	Simran Katara, 07/08/2024, 3:22 pm

General Options

Required	<input checked="" type="checkbox"/>
Default Value	

Validation Rules

New

Validation Rules Help

No validation rules defined.

Address

Setup

Home

Object Manager

Search Setup

12

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

Volunteer Custom Field

Address

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	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	Simran Katara, 07/08/2024, 3:22 pm	Modified By	Simran Katara, 07/08/2024, 3:22 pm

General Options

Default Value	
---------------	--

Long Text Area Options

# Visible Lines	3	Length	32,768
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Validation Rules

New

Validation Rules Help

Contact Number

Setup

Home

Object Manager

Search Setup

12

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

Volunteer Custom Field

Contact Number

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	Contact Number	Object Name	Volunteer
Field Name	Contact_Number	Data Type	Number
API Name	Contact_Number__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Simran Katara, 07/08/2024, 3:21 pm	Modified By	Simran Katara, 07/08/2024, 3:21 pm

General Options

Required	<input checked="" type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
AI Prediction	<input type="checkbox"/>
Default Value	

Email

Setup

Home

Object Manager

Search Setup

12

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

Volunteer Custom Field

Email

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	Email	Object Name	Volunteer
Field Name	Email	Data Type	Email
API Name	Email__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Simran Katara, 07/08/2024, 3:20 pm	Modified By	Simran Katara, 07/08/2024, 3:20 pm

General Options

Required	<input checked="" type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
Default Value	

Validation Rules

More

Validation Rules (0)

Age

Setup

Home

Object Manager

Search Setup

Star

Plus

Home

Help

Settings

12

Avatar

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

Volunteer Custom Field

Age

Back to Volunteer

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Age	Object Name	Volunteer
Field Name	Age	Data Type	Number
API Name	Age__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Simran Kataria, 07/08/2024, 3:19 pm	Modified By	Simran Kataria, 07/08/2024, 3:19 pm

General Options

Required	<input checked="" type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
AI Prediction	<input type="checkbox"/>
Default Value	

Available On

Setup

Home

Object Manager

Search Setup

Star

Plus

Home

Help

Settings

12

Avatar

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

Volunteer Custom Field

Available On

Back to Volunteer

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere 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	Simran Kataria, 07/08/2024, 3:18 pm	Modified By	Simran Kataria, 07/08/2024, 3:18 pm

General Options

Required	<input checked="" type="checkbox"/>
Default Value	

Validation Rules

New

Validation Rules Help (?)

No validation rules defined.

Volunteer Id

Volunteer Custom Field
Volunteer ID
[Back to 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

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	Simran Kataria	Modified By	Simran Kataria
	07/08/2024, 3:16 pm		07/08/2024, 3:16 pm

General Options

External ID	<input type="checkbox"/>
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Auto Number Options

Display Format	
----------------	--

Drop-Off Point

Volunteer Custom Field
Drop-Off Point
[Back to 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

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	Simran Kataria	Modified By	Simran Kataria
	07/08/2024, 1:58 pm		07/08/2024, 1:58 pm

Master-Detail Options

Related To	Drop-Off Point	Child Relationship Name	Volunteers
Related List Label	Volunteers		
Sharing Setting	Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		
Reparentable Master Detail	<input type="checkbox"/>		

Lookup Filter

Creation of Fields for the Venue Object

Contact Email

Setup

Home

Object Manager

Search Setup

12

SETUP > OBJECT MANAGER

Venue

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

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	Simran Kataria, 07/08/2024, 2:12 pm	Modified By	Simran Kataria, 07/08/2024, 2:12 pm

General Options

Required	<input checked="" type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
Default Value	

Validation Rules

New

Validation Rules Help

Contact Phone

Setup

Home

Object Manager

Search Setup

12

SETUP > OBJECT MANAGER

Venue

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Venue Custom Field

Contact Phone

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 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	Simran Kataria, 07/08/2024, 2:14 pm	Modified By	Simran Kataria, 07/08/2024, 2:14 pm

General Options

Required	<input checked="" type="checkbox"/>
Default Value	

Validation Rules

New

Validation Rules Help

Location

Setup

Home

Object Manager

Search Setup

Star

Plus

Cloud

Help

Settings

12

Avatar

Setup > OBJECT MANAGER

Venue

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Venue Custom Field

Location

Back to Venue

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	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	Simran Kataria	Modified By	Simran Kataria
	07/08/2024, 2:15 pm		07/08/2024, 2:15 pm

General Options

Required	<input type="checkbox"/>
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Geolocation Options

Decimal	<input type="checkbox"/>
Decimal Places	4

Venue

Location

Setup

Home

Object Manager

Search Setup

Star

Plus

Cloud

Help

Settings

12

Avatar

Setup > OBJECT MANAGER

Venue

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Venue Custom Field

Venue Location

Back to Venue

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	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	Simran Kataria	Modified By	Simran Kataria
	07/08/2024, 2:16 pm		07/08/2024, 2:16 pm

General Options

Default Value	
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Long Text Area Options

# Visible Lines	3	Length	32,768
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Validation Rules

New

Validation Rules Help

Creation of Fields for the Drop-Off Point Object

Location 2

Setup

Home

Object Manager

Search Setup

12

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

List View Button Layout

Restriction Rules

Drop-Off Point Custom Field

Location 2

Back to Drop-Off Point

Validation Rules (1)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

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	Simran Katara, 07/08/2024, 2:24 pm	Modified By	Simran Katara, 07/08/2024, 2:24 pm

General Options

Required	<input type="checkbox"/>
----------	--------------------------

Geolocation Options

Decimal	<input checked="" type="checkbox"/>
Decimal Places	4

Distance Calculation

Setup

Home

Object Manager

Search Setup

12

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

List View Button Layout

Restriction Rules

Drop-Off Point Custom Field

distance calculation

Back to Drop-Off Point

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	Simran Katara, 16/08/2024, 6:41 pm	Modified By	Simran Katara, 16/08/2024, 6:41 pm

Formula Options

Data Type	Formula
Decimal Places	2

DISTANCE(Location_2__c , Venue__r.Location__c , 'km')

Creation of Fields for the Task Object

Venue_c

Setup

Home

Object Manager

Search Setup

12

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

Search Layouts

List View Button Layout

Restriction Rules

Task Custom Field

Venue__r

Back to Task

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Venue__r	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	Simran Kataria, 07/08/2024, 2:01 pm	Modified By	Simran Kataria, 07/08/2024, 2:53 pm

Lookup Options

Related To	Drop-Off Point	Child Relationship Name	Tasks
Related List Label			
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

Lookup Filter

Distance

Setup

Home

Object Manager

Search Setup

12

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

Search Layouts

List View Button Layout

Restriction Rules

Task Custom Field

Distance

Back to Task

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Distance	Object Name	Task
Field Name	Distance	Data Type	Number
API Name	Distance__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Simran Kataria, 07/08/2024, 3:01 pm	Modified By	Simran Kataria, 07/08/2024, 3:01 pm

General Options

Required	<input checked="" type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
AI Prediction	<input type="checkbox"/>
Default Value	

Feedback

Setup

Home

Object Manager

Search Setup

Star

Plus

Cloud

Help

Settings

12

Avatar

Task

Task Custom Field

Feedback

Back to Task

Validation Rules (0)

Help for this Page

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

Custom Field Definition Detail

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	Simran Kataria	Modified By	Simran Kataria
	07/08/2024, 3:13 pm		07/08/2024, 3:13 pm

General Options

Default Value	
---------------	--

Long Text Area Options

# Visible Lines	3	Length	32,768
-----------------	---	--------	--------

Validation Rules

New

Validation Rules Help

Rating

Setup

Home

Object Manager

Search Setup

Star

Plus

Cloud

Help

Settings

12

Avatar

Task

Task Custom Field

Rating

Back to Task

Validation Rules (0)

Help for this Page

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

Custom Field Definition Detail

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	Simran Kataria	Modified By	Simran Kataria
	07/08/2024, 3:12 pm		07/08/2024, 3:12 pm


General Options

Required	<input type="checkbox"/>
Default Value	<div></div>







Picklist Options

Restrict picklist to the values defined in the value set	<input checked="" type="checkbox"/>
--	-------------------------------------

Phone



Search Setup



SetupHomeObject Manager

Task

Task Custom Field
Phone

Validation Rules (0)

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

Custom Field Definition Detail

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	Simran Kataria, 07/08/2024, 3:11 pm	Modified By	Simran Kataria, 07/08/2024, 3:11 pm

General Options

Required☐

Default Value


Validation Rules

New







Validation Rules Help

No validation rules defined.

Name Of The Person



Search Setup



SetupHomeObject Manager

Task

Task Custom Field
Name of the Person

Validation Rules (0)

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

Custom Field Definition Detail

Field Information

Field Label	Name of the Person	Object Name	Task
Field Name	Name_of_the_Person	Data Type	Text
API Name	Name_of_the_Person__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Simran Kataria, 07/08/2024, 3:10 pm	Modified By	Simran Kataria, 07/08/2024, 3:10 pm

General Options

Required☐

Unique☐

Case Sensitive☐

External ID☐

Default Value

Food Category

Setup

Home

Object Manager

Search Setup

12

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

Search Layouts

List View Button Layout

Restriction Rules

Task Custom Field

Food Category

Back to Task

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	Simran Katara, 07/08/2024, 3:08 pm	Modified By	Simran Katara, 07/08/2024, 3:08 pm

General Options

Required	<input checked="" type="checkbox"/>
Default Value	

Picklist (Multi-Select) Options

Restrict picklist to the values defined in the value set	<input checked="" type="checkbox"/>
--	-------------------------------------

Number Of People Saved

Setup

Home

Object Manager

Search Setup

12

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

Search Layouts

List View Button Layout

Restriction Rules

Task Custom Field

Number of People Served

Back to Task

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	Simran Katara, 07/08/2024, 3:09 pm	Modified By	Simran Katara, 07/08/2024, 3:09 pm

General Options

Required	<input checked="" type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
AI Prediction	<input type="checkbox"/>
Default Value	

Date

Setup

Home

Object Manager

Search Setup

12

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

Search Layouts

List View Button Layout

Restriction Rules

Task Custom Field

Date

Back to Task

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	Simran Katara, 07/08/2024, 3:07 pm	Modified By	Simran Katara, 07/08/2024, 3:07 pm

General Options

Required	<input checked="" type="checkbox"/>
Default Value	

Validation Rules

New

Validation Rules Help

No validation rules defined.

Task ID

Setup

Home

Object Manager

Search Setup

12

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

Search Layouts

List View Button Layout

Restriction Rules

Task Custom Field

Task ID

Back to Task

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	Simran Katara, 07/08/2024, 3:08 pm	Modified By	Simran Katara, 07/08/2024, 3:08 pm

General Options

External ID	<input type="checkbox"/>
-------------	--------------------------

Auto Number Options

Display Format	TASK-{0}
----------------	----------

Creation of Fields for the Execution Details Object

Volunteer

Setup Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Execution Detail

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

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

[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	Simran Katara, 07/08/2024, 1:58 pm	Modified By	Simran Katara, 07/08/2024, 1:58 pm

Master-Detail Options

Related To	Volunteer	Child Relationship Name	Execution_Details
Related List Label	Execution Details		
Sharing Setting	Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		
Reparentable Master Detail	<input type="checkbox"/>		

Lookup Filter

Task

Setup Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Execution Detail

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Execution Detail Custom Field
Task
[Back to Execution Detail](#)

[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	Simran Katara, 07/08/2024, 1:59 pm	Modified By	Simran Katara, 07/08/2024, 1:59 pm

Master-Detail Options

Related To	Task	Child Relationship Name	Execution_Details
Related List Label	Execution Details		
Sharing Setting	Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		
Reparentable Master Detail	<input type="checkbox"/>		

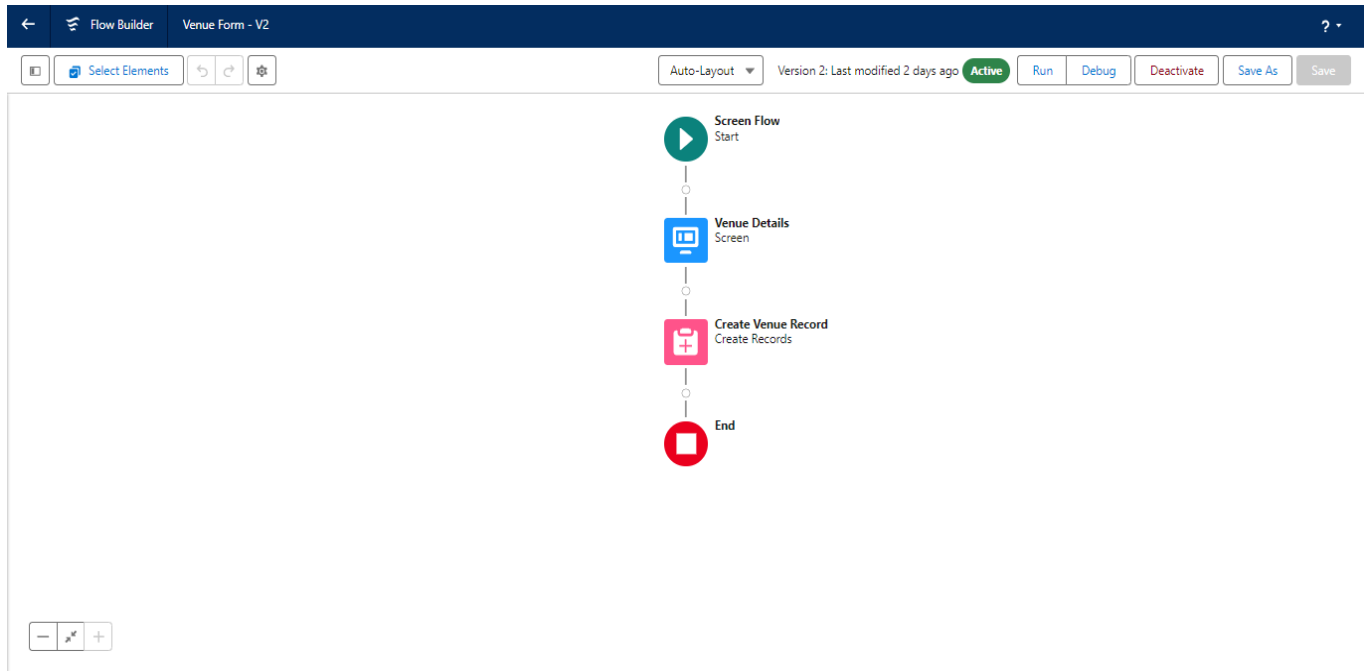
Lookup Filter

5) 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

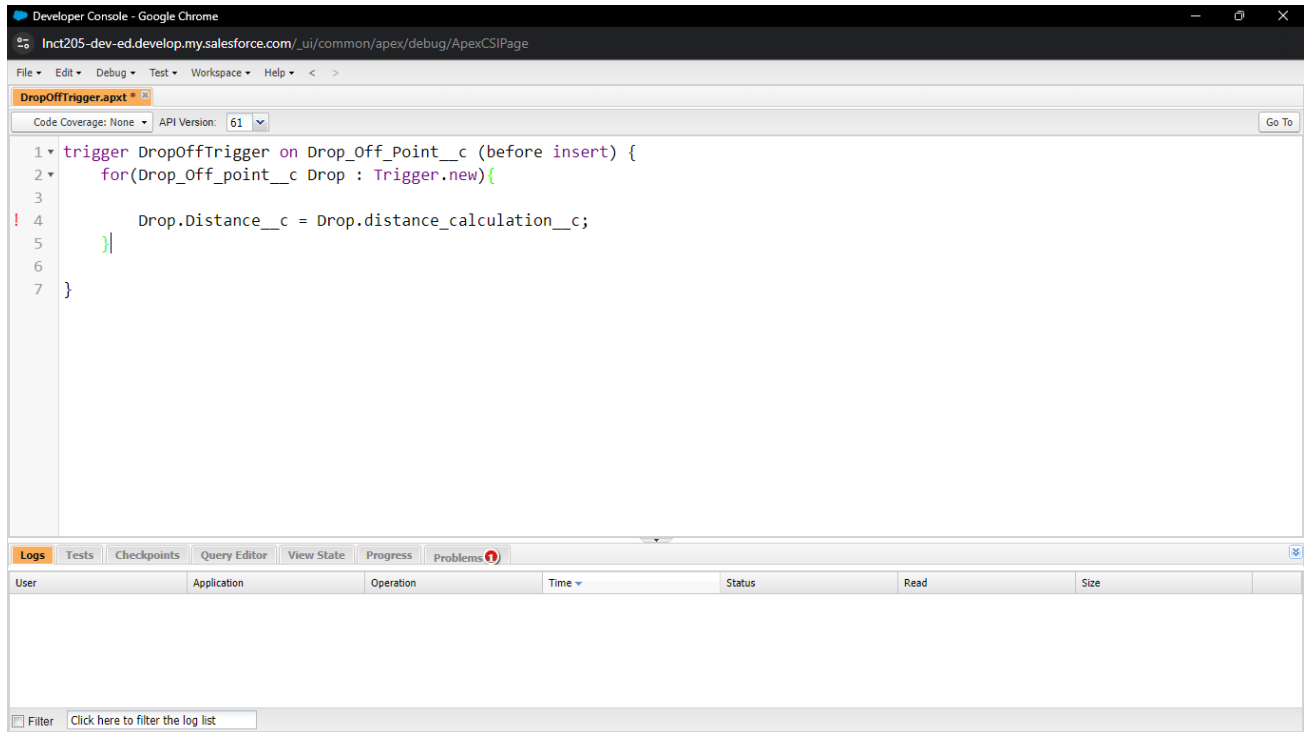


6) Trigger

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



7) 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.

NGOs Profile

The screenshot displays the Salesforce Setup interface for the 'NGOs Profile'. The left sidebar shows the navigation menu with 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Profiles' and shows the 'NGOs Profile' configuration. The profile is named 'NGOs Profile' and is a 'Custom Profile' for the 'Salesforce Platform' license. It was created by 'Simran Katara' on 07/08/2024 at 3:47 pm and last modified by 'Simran Katara' on 10/08/2024 at 6:41 pm. The 'Page Layouts' section lists various standard object layouts and their assigned page layouts, including Global, Lead, Email Application, Location, Home Page Layout, Location Group, Account, Location Group Assignment, Alternative Payment Method, Object Milestone, and Appointment Invitation. Each layout has a link to 'View Assignment'.

Profile Detail

Name	NGOs Profile
User License	Salesforce Platform
Description	
Created By	Simran Katara, 07/08/2024, 3:47 pm
Modified By	Simran Katara, 10/08/2024, 6:41 pm

Page Layouts

Standard Object Layouts	Page Layout
Global	Global Layout [View Assignment]
Lead	Lead Layout [View Assignment]
Email Application	Not Assigned [View Assignment]
Location	Location Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]
Location Group	Location Group Layout [View Assignment]
Account	Account Layout [View Assignment]
Location Group Assignment	Location Group Assignment Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]
Object Milestone	Object Milestone Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]
Operating Hours	Operating Hours Layout [View Assignment]

8) 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.

Ganga Social Foundation

The screenshot shows the Salesforce Setup interface for the 'Ganga Social Foundation' user. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the user's details, including Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Role, User License, Profile, Active status, and various permissions. The user is currently active and has the role of 'Marketing User'.

User Detail	
Name	Ganga Social Foundation
Alias	gfsoun
Email	simrankata07@gmail.com
Username	ganga-socialfoundation@sb.com
Nickname	User101
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Manager	
Role	Marketing User
User License	Salesforce Platform
Profile	NGOs Profile
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	<input type="checkbox"/>
Data.com User Type	<input type="checkbox"/>
Accessibility Mode (Classic Only)	<input type="checkbox"/>
Debug Mode	<input type="checkbox"/>

Smile Foundation

The screenshot shows the Salesforce Setup interface for the 'Smile Foundation' user. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the user's details, including Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Role, User License, Profile, Active status, and various permissions. The user is currently active and has the role of 'Marketing User'.

User Detail	
Name	Smile Foundation
Alias	sfoun
Email	simrankata07@gmail.com
Username	smilefoundation@sb.com
Nickname	User102
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Manager	
Role	Marketing User
User License	Salesforce Platform
Profile	NGOs Profile
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	<input type="checkbox"/>
Data.com User Type	<input type="checkbox"/>
Accessibility Mode (Classic Only)	<input type="checkbox"/>
Debug Mode	<input type="checkbox"/>

Helpage Foundation

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

Didn't find what you're looking for?

Try using Global Search.

SETUP

Users

User

Helpage 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 \(1\)](#) |
 [Group Membership \(0\)](#) |
 [Teams \(0\)](#) |
 [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

Freeze

View Summary

Name	Helpage Foundation	Role	
Alias	hfoun	User License	Salesforce Platform
Email	saurankatare07@gmail.com	Profile	NGO's Profile
Username	helpagefoundation@sb.com	Active	<input checked="" type="checkbox"/>
Nickname	User103	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"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>

9) 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.

Ganga Social

The screenshot shows the Salesforce Setup interface for the 'Ganga Social' Public Group. The left sidebar contains a navigation menu with 'Public Groups' selected. The main content area displays the group's details and a list of its members.

Group Details:

- Label: Ganga Social
- Group Name: Ganga_Social
- Grant Access Using Hierarchies: ☒
- Created By: Simran Katara, 18/08/2024, 6:35 pm
- Modified By: Simran Katara, 18/08/2024, 6:35 pm

Group Members:

Name	Type
Simran Katara	User
Ganga Social Foundation	User

Smile

The screenshot shows the Salesforce Setup interface for the 'Smile' Public Group. The left sidebar contains a navigation menu with 'Public Groups' selected. The main content area displays the group's details and a list of its members.


Group Details:

- Label: Smile
- Group Name: Smile
- Grant Access Using Hierarchies: ☒
- Created By: Simran Katara, 18/08/2024, 6:35 pm
- Modified By: Simran Katara, 18/08/2024, 6:35 pm








Group Members:

Name	Type
Simran Katara	User
Smile Foundation	User

Helpage



Search Setup



SetupHomeObject Manager

public

Users

Public Groups

Feature Settings

Salesforce Files

Content Deliveries and Public Links

Company Settings

Calendar Settings

Public Calendars and Resources

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

Public Groups

Group
Helpage

Help for this Page

EditDeleteView Summary

Label	Helpage
Group Name	Helpage
Grant Access Using Hierarchies	<input checked="" type="checkbox"/>
Created By	Simran Kataria 18/08/2024, 6:35 pm
Modified By	Simran Kataria 18/08/2024, 6:35 pm

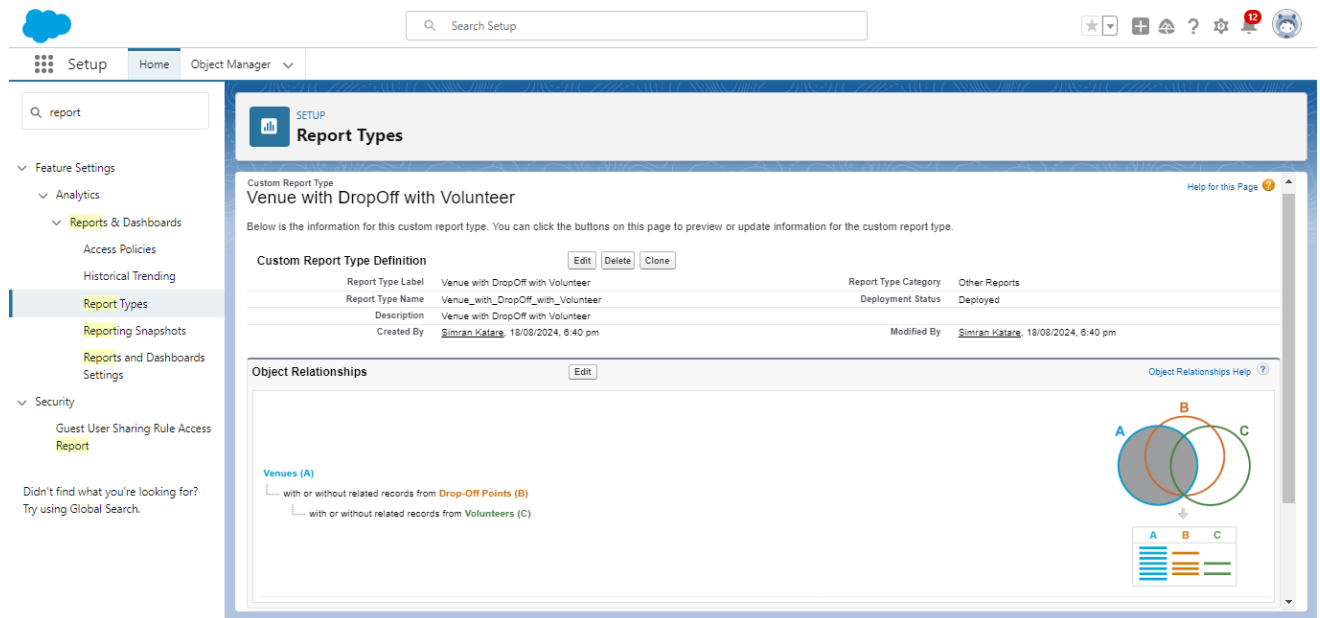
View All Users

Name	Type
Simran Kataria	User
Helpage Foundation	User

10) 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.



The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with "report" and a navigation menu with categories like Feature Settings, Analytics, and Security. The main content area is titled "Report Types" and displays a custom report type definition for "Venue with DropOff with Volunteer".

Custom Report Type Definition

Report Type Label	Report Type Name	Description	Created By	Created Date	Report Type Category	Deployment Status	Other Reports	Modified By	Modified Date
Venue with DropOff with Volunteer	Venue_with_DropOff_with_Volunteer	Venue with DropOff with Volunteer	Simran Kataria	18/08/2024, 8:40 pm		Deployed		Simran Kataria	18/08/2024, 8:40 pm

Object Relationships

Venues (A)

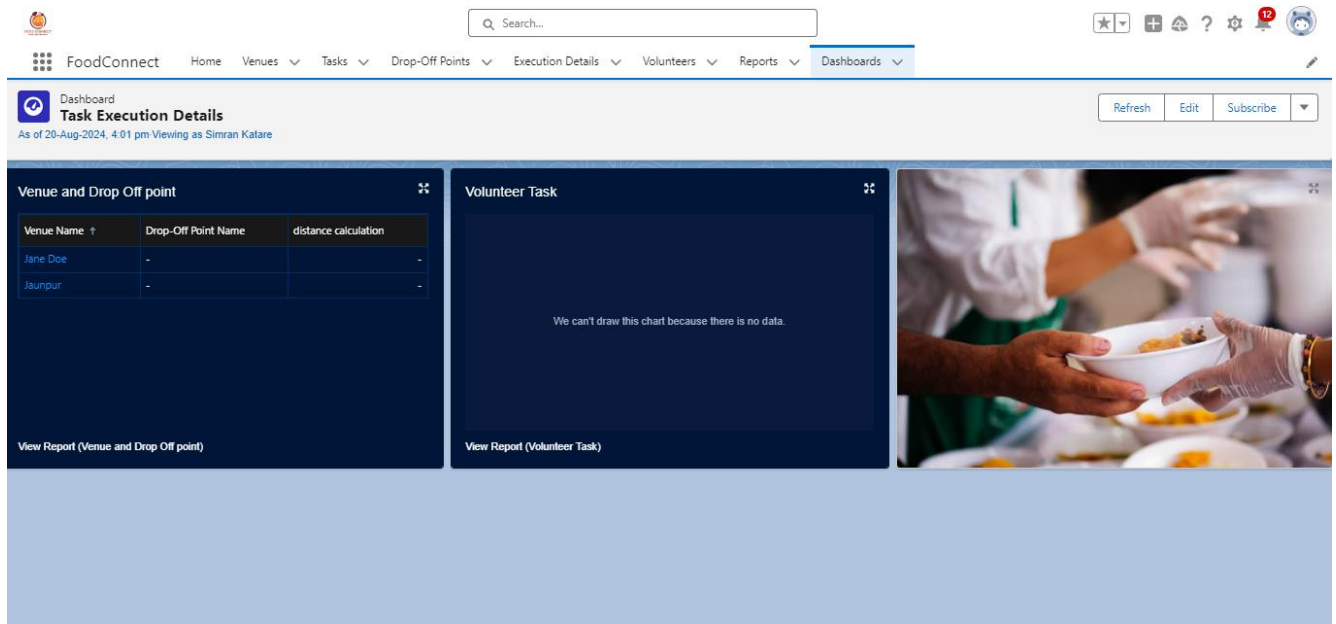
- with or without related records from Drop-Off Points (B)
- with or without related records from Volunteers (C)

The diagram shows three overlapping circles labeled A, B, and C. Circle A is blue, B is orange, and C is green. Below the diagram is a table with columns A, B, and C, each containing a list of records.

11) 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.



12) 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. The left sidebar contains navigation links: Setup, Home, and Object Manager. Below these is a search bar with the text "Q shar". Under the "Security" section, there are links for "Guest User Sharing Rule Access Report" and "Sharing Settings". A message at the bottom of the sidebar says "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Sharing Settings" and contains several sections for defining sharing rules:

- Work Type Sharing Rules**: A section with a "New" button, a "Recalculate" button, and a "Work Type Sharing Rules Help" link. It currently shows "No sharing rules specified."
- Work Type Group Sharing Rules**: A section with a "New" button, a "Recalculate" button, and a "Work Type Group Sharing Rules Help" link. It currently shows "No sharing rules specified."
- Drop-Off Point Sharing Rules**: A section with a "New" button, a "Recalculate" button, and a "Drop-Off Point Sharing Rules Help" link. It contains a table with three columns: Action, Criteria, and Access Level.

Action	Criteria	Shared With	Access Level
Edit Del	Drop-Off Point: Location 2 (Latitude) LESS OR EQUAL 15	Group: Ganga Social	Read/Write
Edit Del	(Drop-Off Point: Location 2 (Latitude) GREATER THAN 30) AND (Drop-Off Point: Location 2 (Latitude) LESS OR EQUAL 50)	Group: Helange	Read/Write
Edit Del	(Drop-Off Point: Location 2 (Latitude) GREATER THAN 15) AND (Drop-Off Point: Location 2 (Latitude) LESS OR EQUAL 30)	Group: Smile	Read/Write

- Task Sharing Rules**: A section with a "New" button, a "Recalculate" button, and a "Task Sharing Rules Help" link. It currently shows "No sharing rules specified."
- Venue Sharing Rules**: A section with a "New" button, a "Recalculate" button, and a "Venue Sharing Rules Help" link. It currently shows "No sharing rules specified."

13) Conclusions

By leveraging the Salesforce platform, the project successfully established a streamlined and transparent system for managing surplus food donations. Through efficient coordination with volunteers and timely delivery to beneficiaries, the project effectively addressed food insecurity while maximizing the utilization of available resources.

Food Connect App

The screenshot displays the FoodConnect Salesforce dashboard. The top navigation bar includes the FoodConnect logo, a search bar, and various utility icons. The main dashboard area is divided into several sections:

- Task Execution Details:** A header section with a date/time stamp and user information, and buttons for Open, Refresh, and Subscribe.
- Venue and Drop Off point:** A table with columns for Venue Name, Drop-Off Point, and distance calculation. It lists Jane Doe and Jaunpur as venues.
- Volunteer Task:** A section with a message indicating no data is available for the chart.
- Venue Form:** A form on the right side for entering venue details, including Venue Name, Email, Phone, Venue Location, Latitude, and Longitude.

Venue Name	Drop-Off Point	distance calculation
Jane Doe	-	-
Jaunpur	-	-

The Venue Form includes the following fields:

- Venue Name
- Email (example: you@example.com)
- Phone
- Venue Location
- Latitude
- Longitude

A "Next" button is located at the bottom right of the Venue Form.

