

Title :- To Supply LeftOver Food To Poor

Abstract :-

The **FoodConnect** initiative utilizes Salesforce to build an efficient system for redistributing leftover food to the underprivileged. This involves setting up a Salesforce environment with custom objects like Venues, Drop-Off Points, Volunteers, Tasks, and Execution Details, each linked through master-detail and lookup relationships. Custom fields such as geolocation, contact details, and distance calculations enhance data accuracy and usability. A streamlined data entry process is facilitated through screen flows, while custom tabs and a Lightning app provide a user-friendly interface for navigation and interaction.

Key features include robust user management through public groups and sharing rules to ensure secure, collaborative access, along with insightful reporting through custom reports and dashboards. The home page integrates essential app components, including flows and dashboards, for seamless usability. By leveraging Salesforce's capabilities, FoodConnect simplifies logistics, promotes transparency, and ensures efficient food redistribution, driving impactful social change.

Creating Developer Account

- Creating a developer org in salesforce.
 1. Go to <https://developer.salesforce.com/signup>
 2. On the sign up form, enter the following details

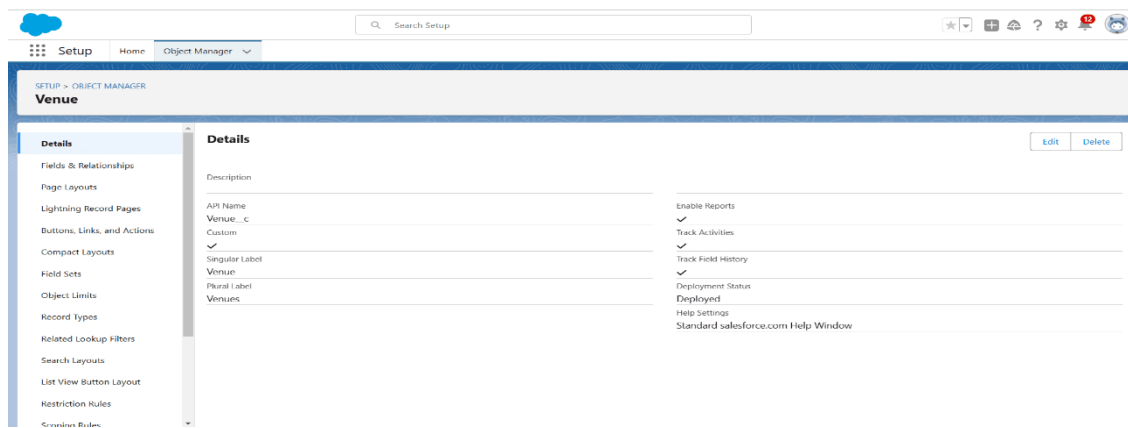
Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.
 1. Give a password and answer a security question and click on change password
 2. Give a password and answer a security question and click on change password.
3. Then you will redirect to your salesforce setup page.

Create Venue Object

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >>Click on Custom Object.
2. Enter the label name >> Venue
3. Plural label name >> Venues
4. Enter Record Name Label and Format
 - Record Name >> Venue Name
 - Data Type >> Text
2. Click on Allow reports and Track Field History,Allow Activities.



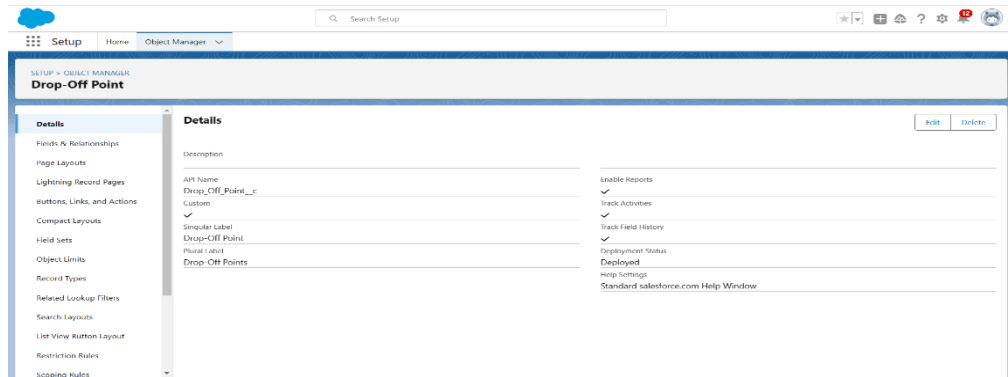
3. Allow search >> Save.

Create Drop-Off Point Object

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
1. Enter the label name >> Drop-Off Point
2. Plural label name>> Drop-Off Points
3. Enter Record Name Label and Format
 - Record Name >> Drop-Off point Name
 - Data Type >> Text
1. Click on Allow reports and Track Field History,Allow Activities

2. Allow search >> Save.



Create Task Object

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

1. Enter the label name>> Task

2. Plural label name>> Tasks

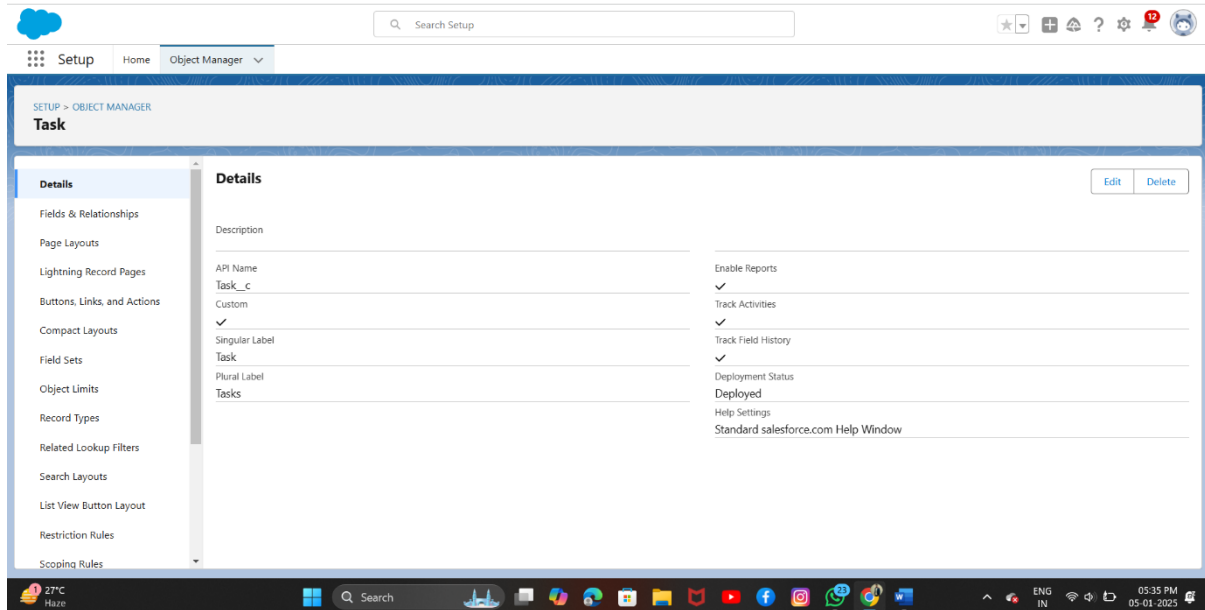
3. Enter Record Name Label and Format

- Record Name >> Task Name

- Data Type >> Text

1. Click on Allow reports and Track Field History, Allow Activities

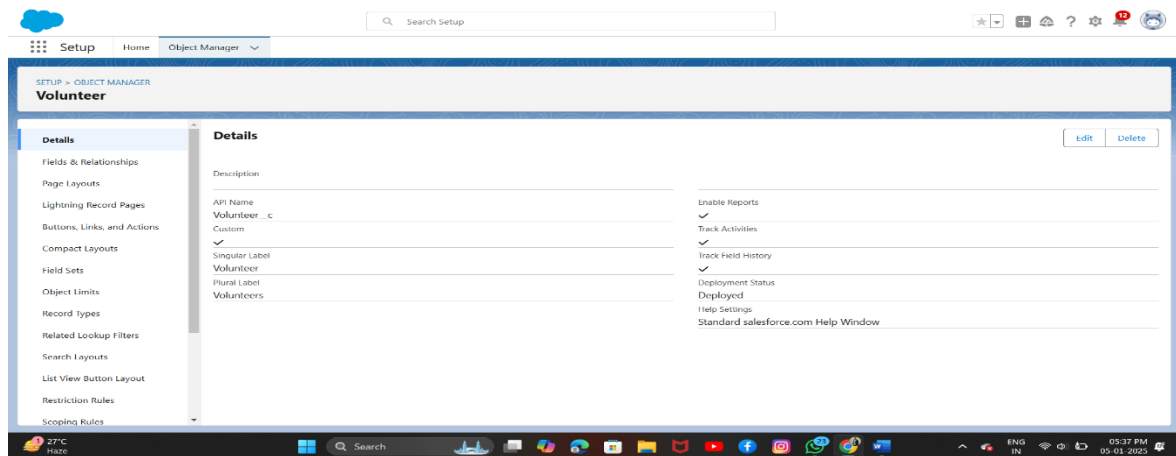
2. Allow search >> Save.



Create Volunteer Object

To create an object:

1. From the setup page >> Click on Object Manager>> Click on Create >> Click on Custom Object.
1. Enter the label name>> Volunteer
2. Plural label name>> Volunteers
3. Enter Record Name Label and Format
 - Record Name >> Volunteer Name
 - Data Type >> Text
1. Click on Allow reports and Track Field History, Allow Activities



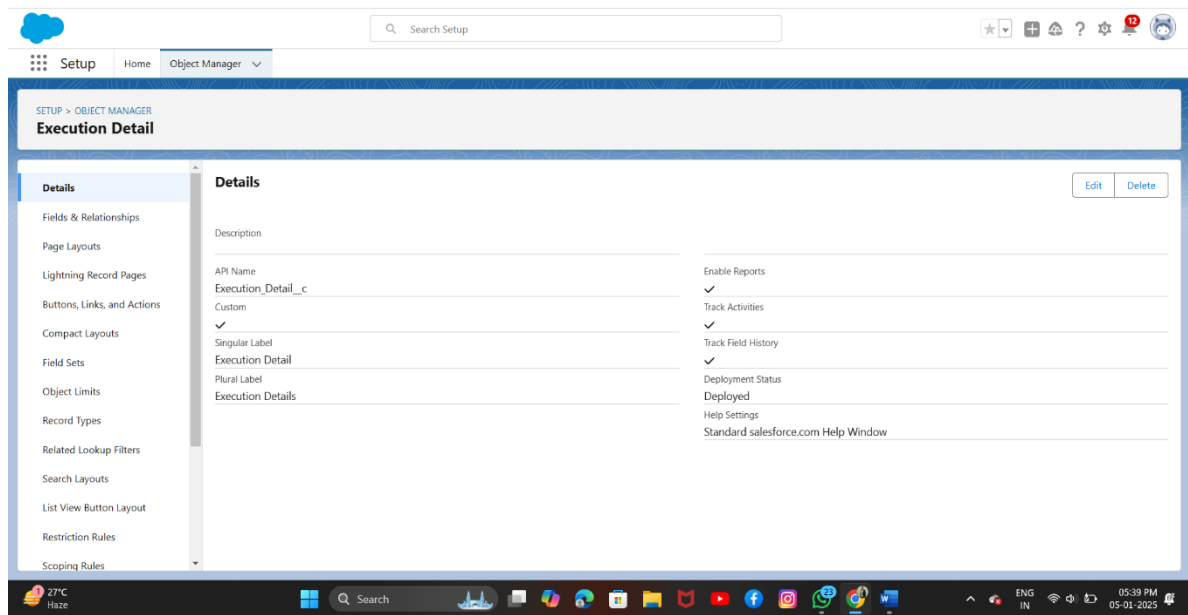
2.

Allow search >> Save.

Create Execution Details Object

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
1. Enter the label name >> Execution Detail
2. Plural label name >> Execution Details
3. Enter Record Name Label and Format
 - Record Name >> Execution Detail Name
 - Data Type >> Text
1. Click on Allow reports and Track Field History, Allow Activities



2. Allow search >> Save.

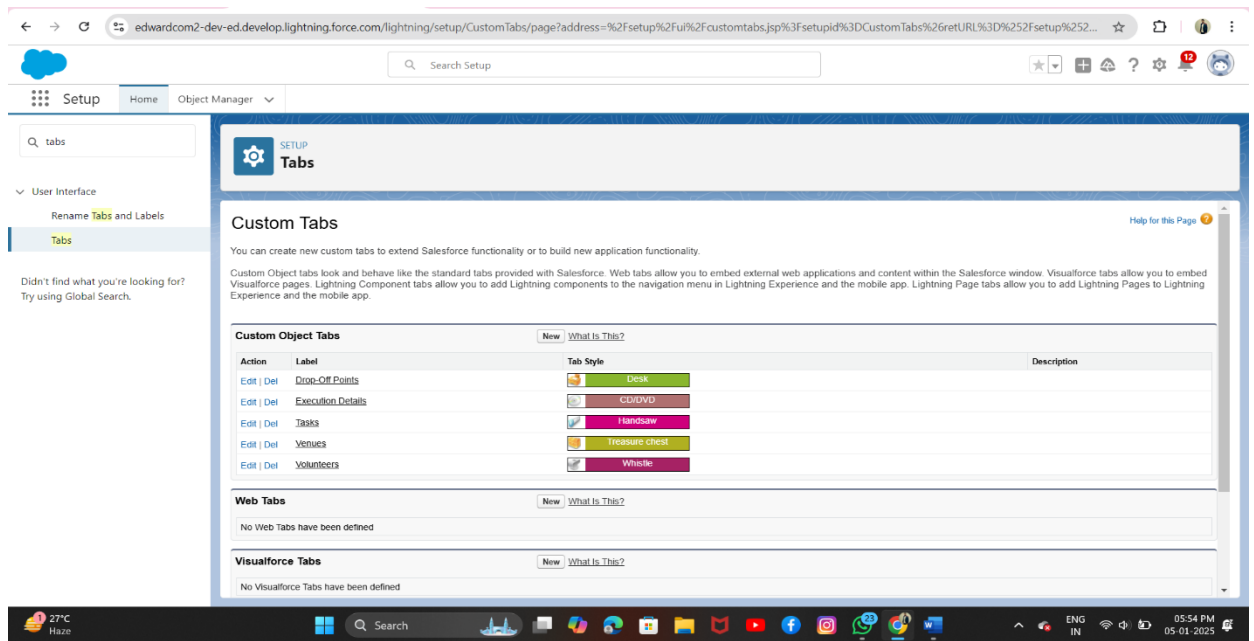
Creating a Custom Tab

To create a Tab:(Venue)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Venue) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save

Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are "Drop-Off Point, Task, Volunteer, Execution Details".

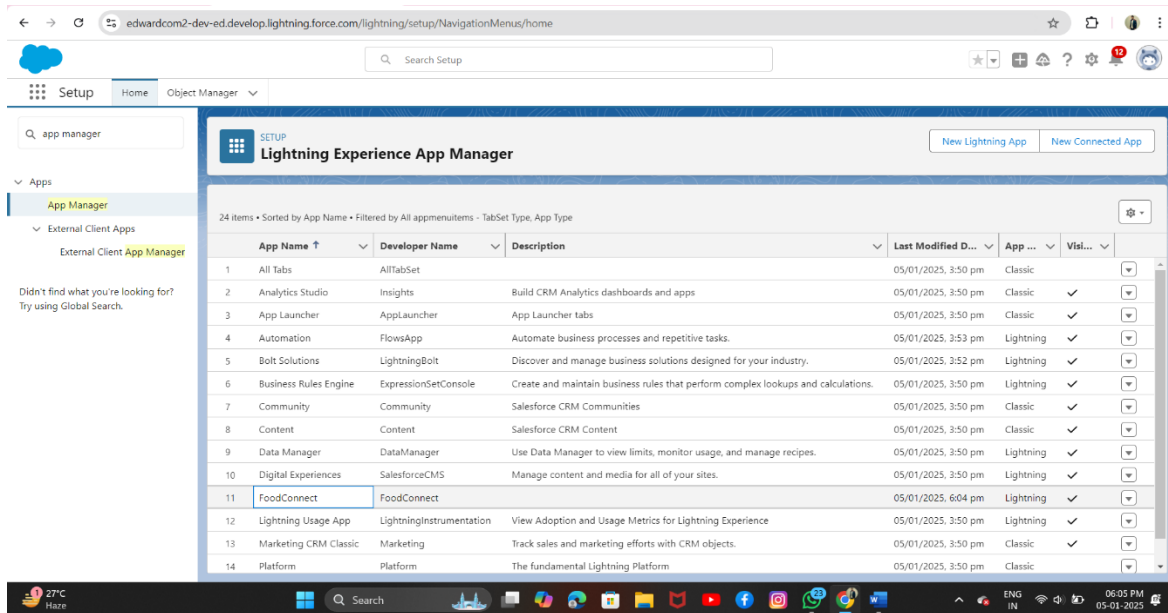


2. Follow the same steps as mentioned in Activity -1 .

Create a Lightning App

To create a lightning app page:

1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.
2. Fill the app name in app details and branding as follow
App Name : FoodConnect
Developer Name : This will auto populated
Image : optional (if you want to give any image you can otherwise not mandatory) Primary color hex value : keep this default.
3. Then click Next >> (App option page)Set Navigation Style as Standard Navigation >> Next.
4. (Utility Items) keep it as default >> Next.
5. To Add Navigation Items: Search for the item in the (Home, Venue, Drop-Off Point, Task, Volunteer, Execution Details, Reports) from the search bar and move it using the arrow button >> Next >> Next.
6. To Add User Profiles: Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.



Creation of Relationship fields in objects

Creation of Lookup Relationship Field on Volunteer Object :

1. Go to setup >> click on Object Manager >> type object name(Volunteer) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Master Detail relationship
 1. Select the related object “Drop-Off point” and click next.
 5. Field Name : Drop_Off_point
 6. Field label : Auto generated
2. Next >> Next >> Save.

Creation of Master Detail Relationship Field on Execution Details Object :

3. Go to setup >> click on Object Manager >> type object name(Execution Details) in the search bar >> click on the object.
4. Now click on “Fields & Relationships” >> New
5. Select Master Detail relationship
6. Select the related object “Volunteer” and click next.
7. Field Name : Volunteer

8. Field label : Auto generated

9. Next >> Next >> Save.

Creation of Master Detail Relationship Field on Execution Details Object :

10. Go to setup >> click on Object Manager >> type object name(Execution Details) in the search bar >> click on the object.

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

12. Select Master Detail relationship

13. Select the related object “Task” and click next.

14. Field Name : Task

15. Field label : Auto generated

16. Next >> Next >> Save.

Creation of Lookup Relationship Field on Drop-Off Point Object :

17. Go to setup >> click on Object Manager >> type object name(Drop-Off Point) in the search bar >> click on the object.

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

19. Select Lookup relationship

20. Select the related object “Venue” and click next.

21. Field Name : Venue

22. Field label : Venue__c

23. Next >> Next >> Save.

Creation of Lookup Relationship Field on Task Object :

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

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

26. Select Lookup relationship

27. Select the related object “Venue” and click next.

28. Field Name : Sponsored By

29. Field label : Auto generated

30. Next >> Next >> Save.

Creation of Lookup Relationship Field on Task Object :

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

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

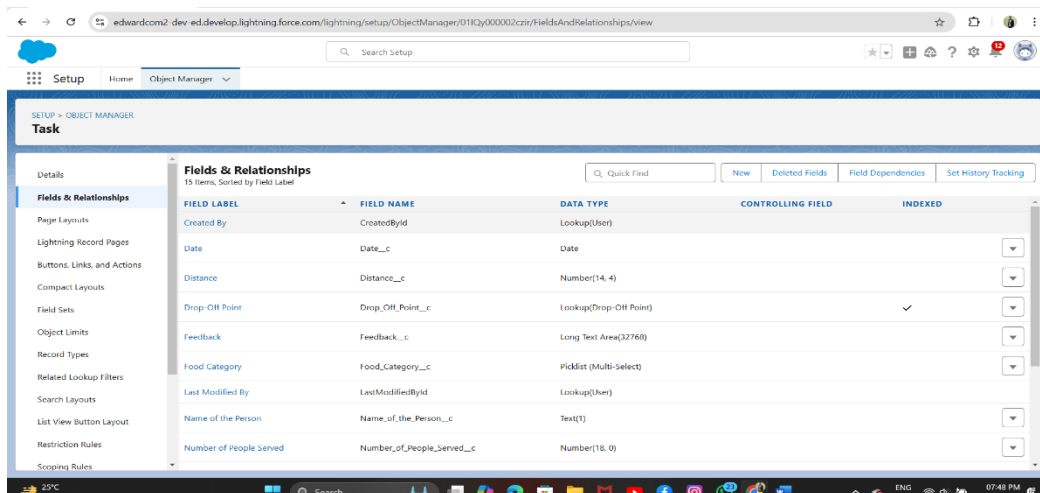
33. Select Lookup relationship

34. Select the related object “Drop-Off point” and click next.

35. Field Name : Drop-Off point

36. Field label : Auto generated

37. Next >> Next >> Save.



Creation of fields for the Venue object

1. Go to setup>> click on Object Manager >> type object name(Venue) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as a "Email" and Click on Next
4. Fill the Above as following:
 - Field Label : Contact Email
 - Field Name : Contact Email
 - Click on required check box
 - Click on Next >> Next >> Save and new.

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Venue) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as a "Phone" and Click on Next
4. Fill the Above as following:
 - Field Label : Contact Phone
 - Field Name : Contact Phone
 - Click on required check box
 - Click on Next >> Next >> Save and new.

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Venue) in search bar >>click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as a "Geolocation" and Click on Next

4. Fill the Above as following:

- Field Label : Location
- Decimal Places : 4
- Field Name : Location
- Description : Enter the Geolocation of your Venue
- Click on Next >> Next >> Save and new.

To create another fields in an object:

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

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

7. Select Data type as a “Long Text Area” and Click on Next

8. Fill the Above as following:

- Field Label : Venue Location
- Field Name : Venue_Location
- Click on Next >> Next >> Save and new.

The screenshot shows the Salesforce Setup interface for the 'Venue' object. The 'Fields & Relationships' section is active, displaying a table of fields. The 'Venue Location' field is highlighted, showing its details: Field Label: Venue Location, Field Name: Venue_Location__c, Data Type: Long Text Area(12768), Controlling Field: (empty), and Indexed: (checked). The table also lists other fields like Contact Email, Contact Phone, Created By, Last Modified By, Location, and Owner.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Contact Email	ContactEmail__c	Email		
Contact Phone	Contact_Phone__c	Phone		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Geolocation		
Owner	OwnerId	Lookup(User,Group)		✓
Venue Location	Venue_Location__c	Long Text Area(12768)		
Venue Name	Name	Text(80)		✓

Creation of fields for the Drop-Off point object

1. Go to setup >> click on Object Manager >> type object name(Drop-Off point) in search bar >> click on the object.

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

3. Select Data type as a “Geolocation” and Click on Next

4. Fill the Above as following:

- Field Label : Location 2
- Field Name : gets auto generated
- Description : Enter the Geolocation of the Drop off Point
- Geolocation Options : select Decimal
- Decimal Places : 4
- Click on Next >> Next >> Save and new.

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Drop-Off point) in search bar >> click on the object.

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

3. Select Data type as a “Formula” and Click on Next

4. Fill the Above as following:

- Field Label : distance calculation
- Field Name : distance_calculation
- Formula Return Type : Number
- Formula Options : DISTANCE(Location_2__c , Venue__r.Location__c , 'km')
- Click on Next >> Next >> Save and new.

To create another fields in an object:

Go to setup >> click on Object Manager >> type object name(Drop-Off point) in search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Picklist” and Click on Next

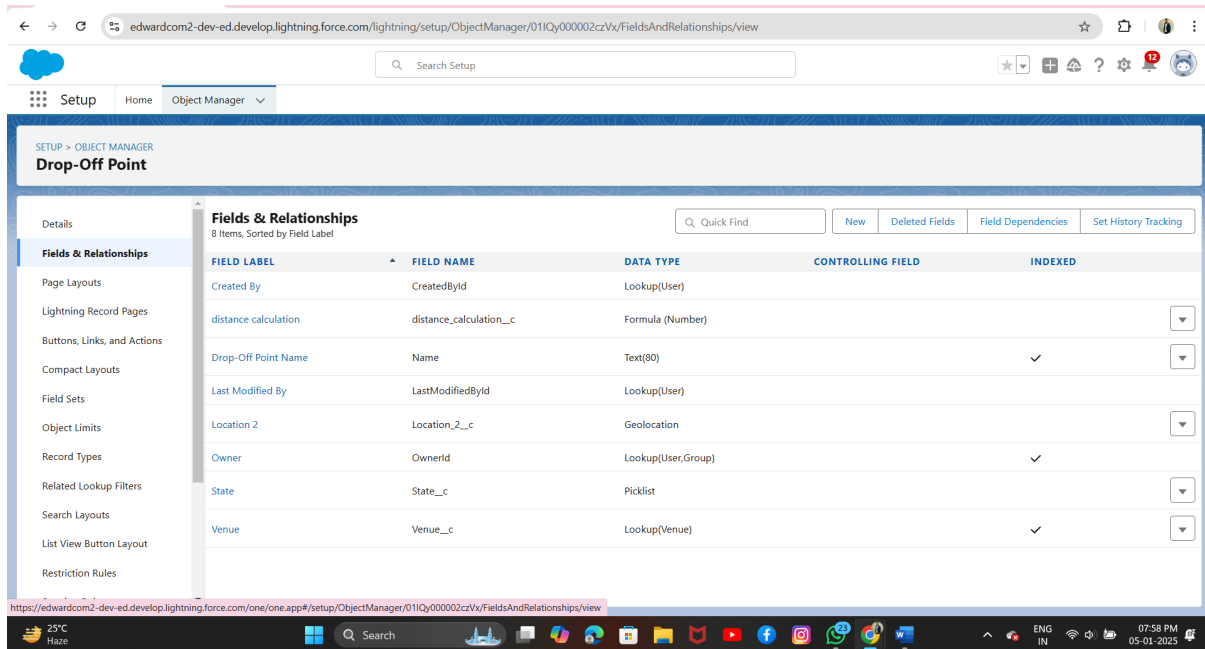
Fill the Above as following:

- Field Label : State

- Field Name : State
- Enter values, with each value separated by a new line :
- Click on required check box
- Click on Next >> Next >> Save and new.

To create another fields in an object:

- a. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
- b. Now click on “Fields & Relationships” >> New
- c. Select Data type as a “Number” and Click on Next
- d. Fill the Above as following:
 - Field Label : Distance
 - Field Name : Distance
 - Length : 14
 - Decimal Places : 4
 - Click on required check box
 - Click on Next >> Next >> Save and new.



Create Flow to create a record in Venue object

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.
2. Select the Screen flow. Click on create.
3. Click on the '+' icon in between start and end, and click on screen element.
4. Under the Screen Properties:
 - a. Label : Venue Details
 - b. API Name : Venue_Details
5. Now lets add components in this flow. Click on Text Component and name it as:
 - a. Label : Venue Name
 - b. API Name : Venue_Name
6. Click on Email Component and name it as:
 - a. Label : Email
 - b. API Name : Contact_Email

7. Click on Phone Component and name it as:

- a. Label : Phone
- b. API Name : Contact_Phone

8. Click on Text Component and name it as:

- a. Label : Venue Location
- b. API Name : Venue_Location

9. Click on Number Component and name it as:

- a. Label : Latitude
- b. API Name : Latitude

10. Click on Number Component and name it as:

- a. Label : longitude
- b. API Name : longitude

11. Next click on Done. This would look like below

12. Click on the '+' icon in between Venue details and end, and click on create record element.

13. Now label it as

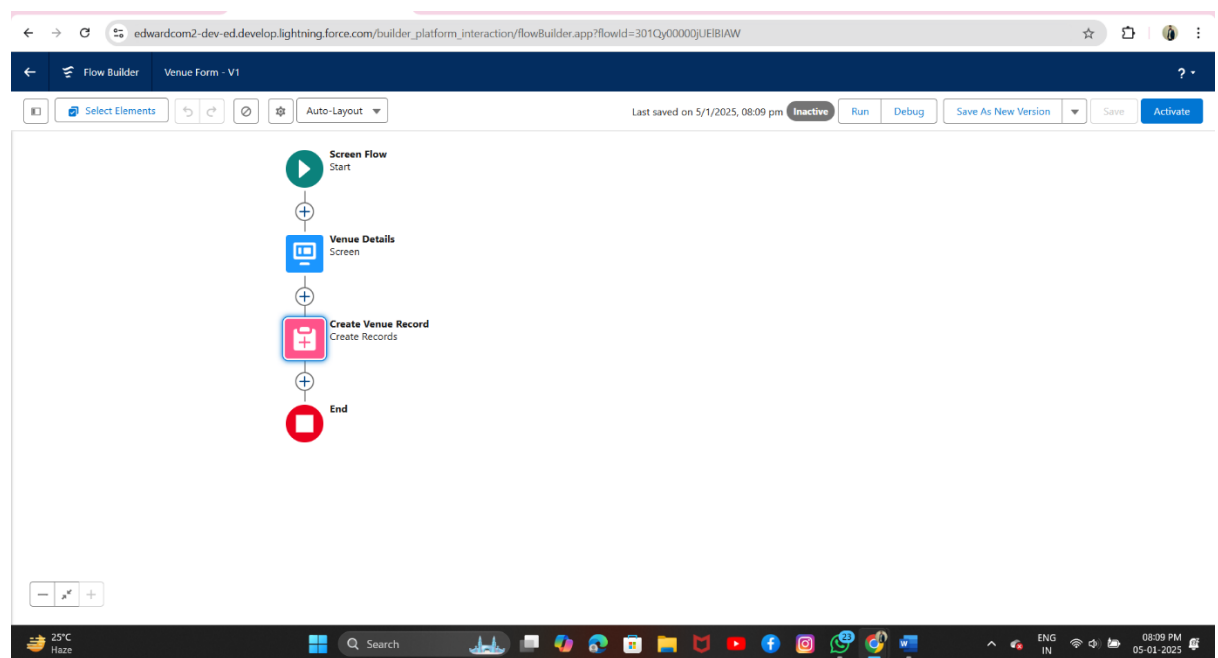
- a. Label : Create Venue Record
- b. API Name : Create_Venue_Record
- c. How Many Records to Create : One
- d. How to Set the Record Fields : Use separate resources, and literal values
- e. Object : Venue
- f. Set Field Values for the Venue : Click on 'Add Field' 5 times
 - i. Field : Value = Contact_Email__c : {!Contact_Email.value}

- ii. Field : Value = Contact_Phone__c : {!Contact_Phone.value}
- iii. Field : Value = Name : {!Venue_Name}
- iv. Field : Value = Venue_Location__c : {!location}
- v. Field : Value = Location__Latitude__s : {!latitude}
- vi. Field : Value = Location__Longitude__s : {!longitude}

14. This would look like:

15. Click on Save as:

a. Flow Label : Venue Form



b. Flow API Name : Venue_Form

Create a Trigger

1. Log into the trailhead account, navigate to the gear icon in the top right corner.
2. Click on developer console and you will be navigated to a new console window.
3. Click on the File menu in the toolbar, and click on new >> Trigger.

4. Enter the trigger name and the object to be triggered.

Enter Name : DropOffTrigger

sObject: Drop-Off Point

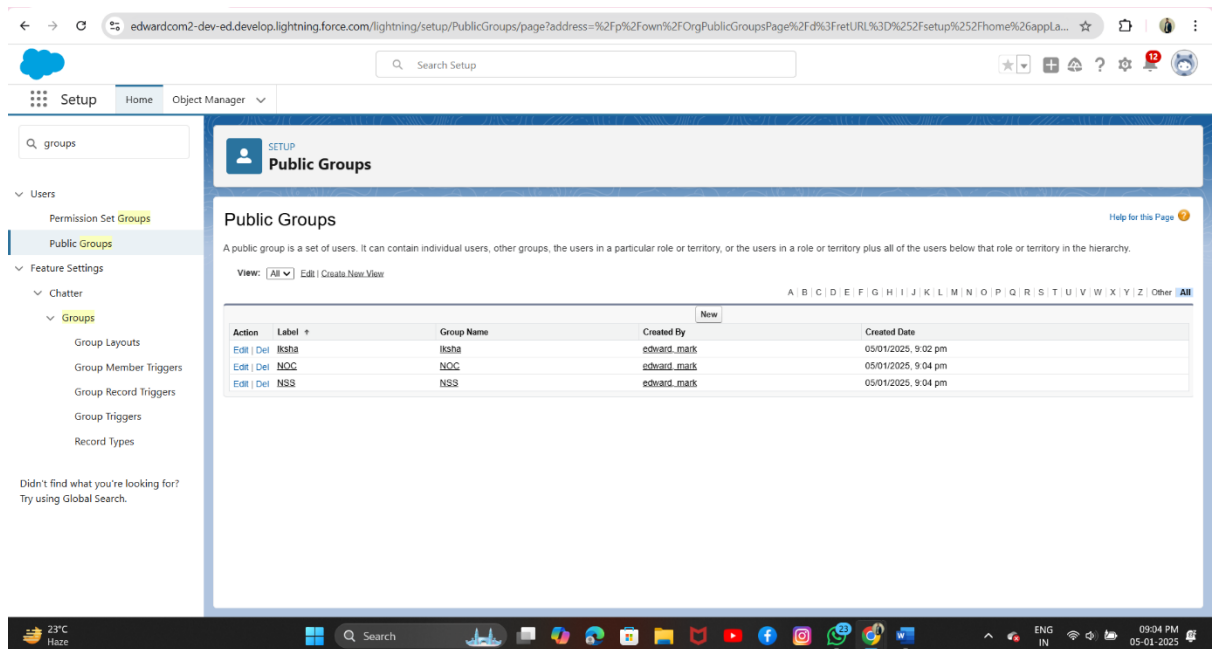
5. Click on Submit.

Creation of User1

1. Go to setup page >> type users in Quick Find bar >> click on users>> New user.
2. In General Information give details as: (Note : create users as per your wish NGO's)

- First Name : Iksha Foundation
- Last Name : Iksha_Foundation
- Alias : iiksh
- Email : Give Your Email
- Username : ikshafoundation@sb.com (give the username different)
- Nickname : Auto Populated
- User License : Salesforce Platform
- Profile : NGOs Profile
- Active : Check

1. Click on Save



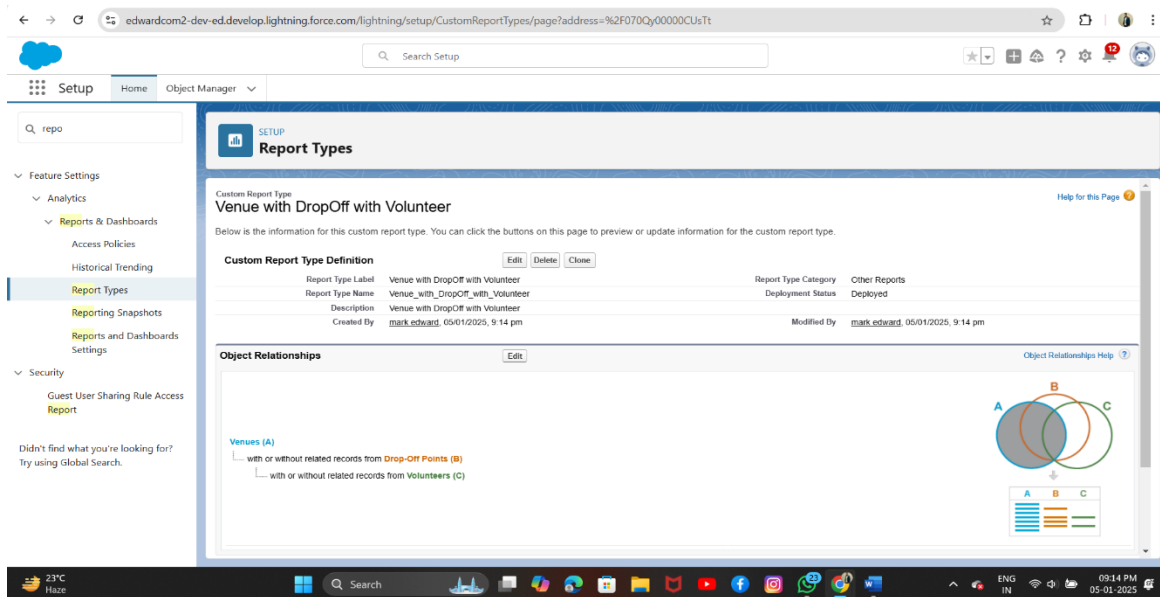
3. By Following Steps in Activity 1, Create other two Public Groups for other two users.

Creation of Report Types

1. Go to setup page >> type Report Types in Quick Find bar >> click on Report Types >> click on Continue >> Click on New Custom Report Type.
2. In Define the Custom Report Type:
 - Primary Object : Select Venues
 - Report Type Label : Venue with DropOff with Volunteer
 - Report Type Name : Venue_with_DropOff_with_Volunteer
 - Description : Venue with DropOff with Volunteer
 - Store in Category : Select Other Reports
 - Deployment Status : Deployed
1. Click on Next
2. Near Click to relate another Object Select Drop-Off Points.
3. And also select "A" records may or may not have related "B" records.

4. Now again Near Click to relate another Object Select Volunteers.

5. Now click on Save.



Creation of Report on Venue with DropOff with Volunteer

1. Go to the app(FoodConnect) >> click on the reports tab

2. Click on New Folder.

- Folder Label : Custom Reports
- Folder Unique Name : CustomReports

1. Open Custom Reports and click on New Report

2. Select Report Type : Venue with DropOff with Volunteer

3. Then click on Start Report.

4. In GROUP ROWS : Add Volunteer Name

5. In Columns : Add Venue Name, Drop-Off point Name, Distance.
6. Now click on Save & Run.
7. Give Label as :
 - Report Name : venue and Drop Off point
 - Report Unique Name : Auto Populated
8. Click on Select Folder and select Custom Report, then click on Save.

Creation of sharing rules

1. Go to setup >> type Sharing Settings in quick find box >> Click on the Sharing Settings.
2. Scroll down and find Drop-Off point Sharing Rules.
3. Click on new near Drop-Off point Sharing Rules and Name it as:
Label : Rule 1
Rule Name : Rule_1
4. Select your rule type : Select Based on criteria.
5. Select which records to be shared:
Field : Operator : Value = Distance : less than : 15
6. Select the users to share with : Near Share With
Public Groups : Iksha
7. Click on Save.
8. Click on new near Drop-Off point Sharing Rules and Name it as:
Label : Rule 2
Rule Name : Rule_2
9. Select your rule type : Select Based on criteria.
10. Select which records to be shared:
Field : Operator : Value = Distance : greater than : 15
Field : Operator : Value = Distance : less or equal : 30
11. Select the users to share with : Near Share With
Public Groups : NSS
12. Click on Save.

13. Click on new near Drop-Off point Sharing Rules and Name it as:

Label : Rule 3

Rule Name : Rule_3

14. Select your rule type : Select Based on criteria.

15. Select which records to be shared:

Field : Operator : Value = Distance : greater than : 30

Field : Operator : Value = Distance : less or equal : 50

16. Select the users to share with : Near Share With

Public Groups : Street Cause

17. Click on Save.

The screenshot shows the Salesforce Setup page for Sharing Settings. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Sharing Settings' and lists several categories of sharing rules, each with a 'New' and 'Recalculate' button. The 'Delivery Estimation Setup Sharing Rules' category is expanded, showing a table of rules. The table has columns for 'Action', 'Criteria', 'Shared With', and 'Access Level'. The rules are as follows:

Action	Criteria	Shared With	Access Level
Edit Del	Delivery Estimation Setup: Fulfillment Time Calculation Type EQUALS Insight	Group: Iksha	Read Only
Edit Del	(Delivery Estimation Setup: Fulfillment Time Calculation Type EQUALS Insight) AND (Delivery Estimation Setup: Fulfillment Time Calculation Type NOT EQUAL TO None)	Group: NOC	Read Only
Edit Del	Delivery Estimation Setup: Fulfillment Time Calculation Type NOT EQUAL TO None	Group: NSS	Read Only

Creation of Home Page

1. Go to setup >> type Lightning App Builder in quick find box >> Click on the Lightning App Builder and Select the New.
2. Select Home Page and give Label as HOME Page.
3. Select Standard Home Page.
4. Near Components search for Flow and Drag and Drop in Right Side Section..
5. On the right hand side:
Flow : Venue Flow
6. Near Components search for Dashboard, then Drag and Drop it in first Section.

7. Click on Save and Activation, then click on App Default, then Add Assignments.
8. Add FoodConnect App and then Save.
9. FoodConnect Home Page would Look Like this.

