Salesforce Virtual Internship Program
SmartInternz

Project Title: Food Connect - To Supply Leftover Food to the Poor

NAME : KONCHADA VAISHNAVI

E-MAIL : 322103311026@gvpce.ac.in

COLLEGE NAME : GAYATRI VIDYA PARISHAD COLLEGE OF ENGINEERING(A)

1. Project Overview

This project focuses on the development of a Salesforce-based application, "Food Connect," aimed at facilitating the efficient distribution of leftover food from donors to underprivileged communities. By leveraging Salesforce's robust platform, the application optimizes daily operations, improves data accuracy, and provides actionable insights into food donation and distribution processes.

Designed to address the pressing issue of food wastage and hunger, this application automates critical processes such as tracking food donations, inventory management, volunteer coordination, and generating real-time reports.

The primary challenge addressed by this project is the inefficient handling of food donations, which can lead to delays and wastage. By providing a comprehensive, user-friendly solution, Food Connect ensures effective resource management, strengthened donor relationships, and seamless reporting.

Through this project, Food Connect aims to achieve:

1. **Operational Excellence**: Automating routine processes to ensure timely collection and distribution of food.
2. **Data-Driven Decision Making**: Equipping stakeholders with real-time insights into donations, distributions, and volunteer activities.
3. **Scalability and Efficiency**: Supporting long-term growth with a secure, scalable, and flexible solution.

2. Objectives

Business Goals:

1. **Streamlining Operations**: Automating processes such as food donation tracking, inventory updates, and volunteer task allocation.
2. **Improved Decision-Making**: Delivering detailed reports and dashboards for real-time analytics, enabling better allocation of food resources and strategic planning.
3. **Enhancing Donor Relationships**: Providing personalized insights into donor contributions and feedback.
4. **Ensuring Data Security**: Implementing role-based access controls to restrict sensitive information to authorized users.

Specific Outcomes:

1. A centralized platform to monitor and manage food donations and distributions effectively.
2. Real-time automated reports on food collection, distribution, and beneficiary statistics.
3. Reduction of manual errors in data entry and calculations.
4. User-friendly dashboards to visualize key metrics and insights.

3. Salesforce Key Features and Concepts Utilized

1. **Reports and Dashboards**:
   - ■ Automated generation of daily, weekly, and monthly reports on food donations, inventory levels, and distributions.
   - ■ Dashboards displaying critical metrics such as most active donors, top distribution locations, and food wastage trends.
2. **Rollup Summary Fields**:
   - ■ Summarizes data from child records to parent records in master-detail relationships.
   - ■ Examples:
   a. Total food donated by each donor.
      - ○ Total meals distributed in a specific location.
3. **Cross-Object Formula Fields**:
   - ■ Enables calculations across related objects.
   - ■ Example: Total beneficiaries reached calculated using Quantity of Food Distributed × Average Meals per Unit.
4. **Validation Rules**:
   - ■ Ensures data accuracy and completeness.
   - ■ Example: The ISBLANK formula prevents saving records with missing mandatory fields, such as food quantity or beneficiary details, and displays error messages to guide users.
5. **Permission Sets and Organization Wide Defaults (OWD)**: ■ Configures access levels based on roles:
   a. **Admin**: Complete access to all records.
      - ○ **Volunteer Coordinator**: Access restricted to volunteer-related records.
      - ○ **Volunteer**: Limited access based on assigned tasks.
   - ■ Ensures sensitive data is protected while enabling collaboration.

4. Detailed Steps to Solution Design

Requirement Gathering:

1. Conducted discussions with stakeholders, including donors, volunteers, and community leaders, to understand operational pain points, reporting needs, and goals.

Data Model Design:

2. Created custom objects for "Food Inventory," "Donor," "Distribution," and "Beneficiary." ● Defined relationships:
    - ■ Master-detail relationship between "Food Inventory" and "Donor."
    - ■ Lookup relationship between "Distribution" and "Beneficiary."

User Interface (UI) Design:

3. Developed intuitive Lightning Pages tailored to different user roles (e.g., Admin Dashboard, Donation Entry Form).
4. Included custom components to facilitate data entry and quick access to reports.

Business Logic Implementation:

5. Automated workflows for low inventory alerts and donor notifications.
6. Developed Apex classes and triggers for advanced calculations and inventory updates.

Reports and Dashboards:

7. Configured reports to highlight:
    - ■ Daily food donations and distributions.
    - ■ Inventory levels and wastage trends.
    - ■ Volunteer activity metrics.
8. Dashboards provide real-time visualizations for quick decision-making.

Documentation and Screenshots:

9. Documented all components, configurations, and workflows with accompanying screenshots for clarity and reference.

Object : Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

Creating required objects : To Navigate to Setup page

To create an object:

1. From the setup page > Click on Object Manager > Click on Create > Click on Custom Object.
2. On Custom object defining page:
3. Enter the label name, plural label name, click on Allow reports, Allow search.
4. Click on Save.

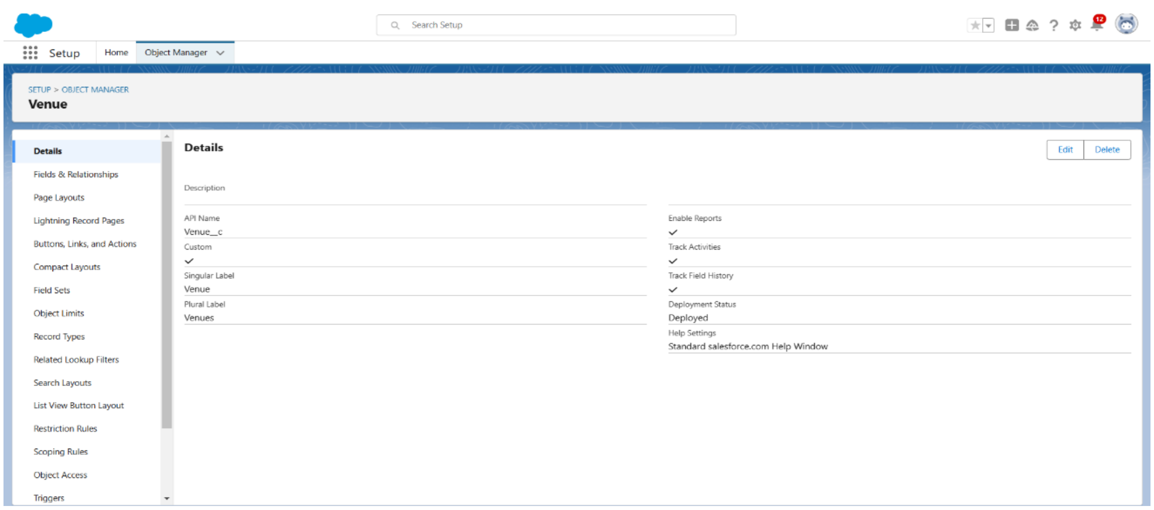
To create an object:

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

1. Enter the label name >> Venue
2. Plural label name >> Venues
3. Enter Record Name Label and Format

- Record Name >> Venue Name
- Data Type >> Text

1. Click on Allow reports and Track Field History,Allow Activities.
2. Allow search >> Save.



To create an object:

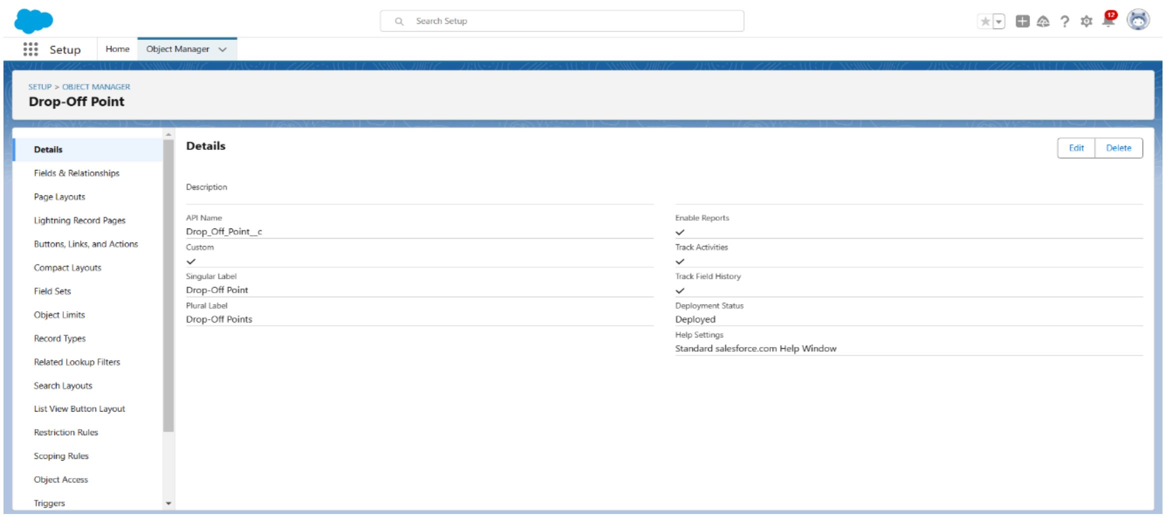
1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

2. Enter the label name >> Drop-Off Point
3. Plural label name>> Drop-Off Points
4. 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.



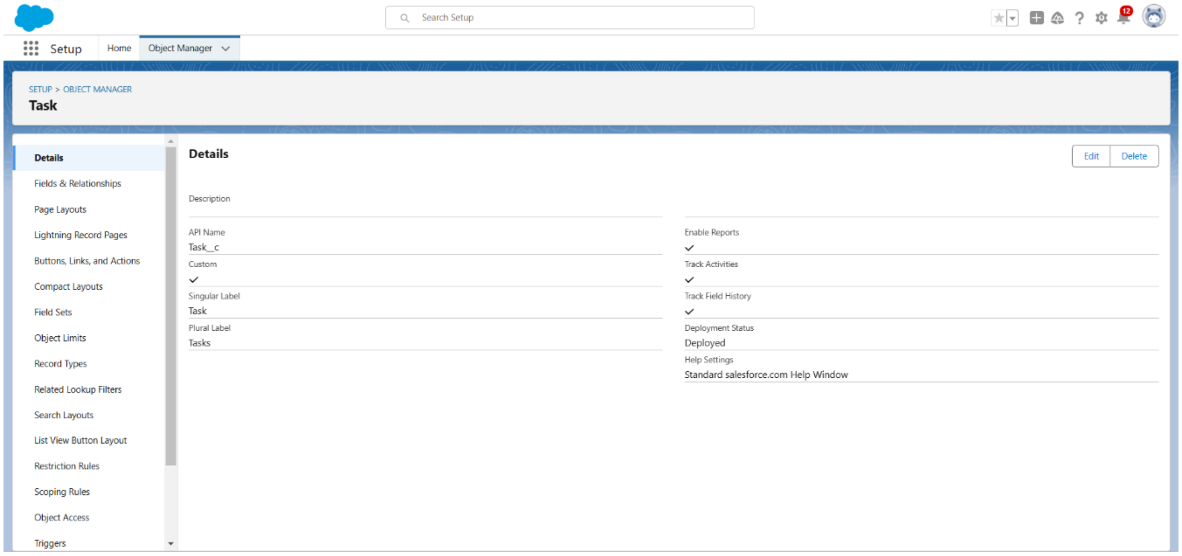
To create an object:

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.

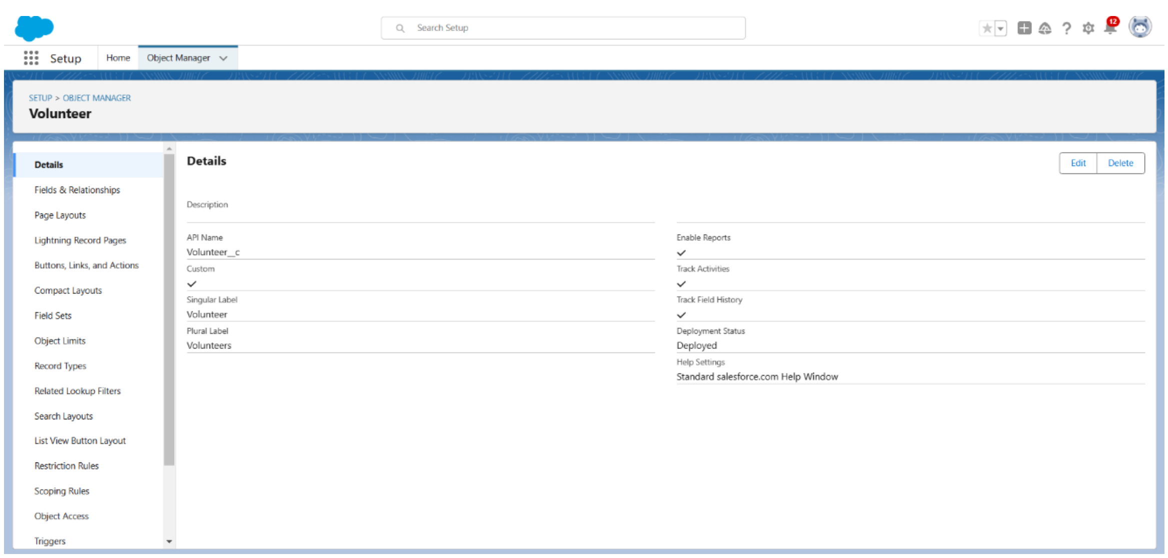


To create an object:

1. From the setup page >> Click on Object Manager>> Click on Create >> Click on Custom Object.
2. Enter the label name>> Volunteer
3. Plural label name>> Volunteers
4. 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.

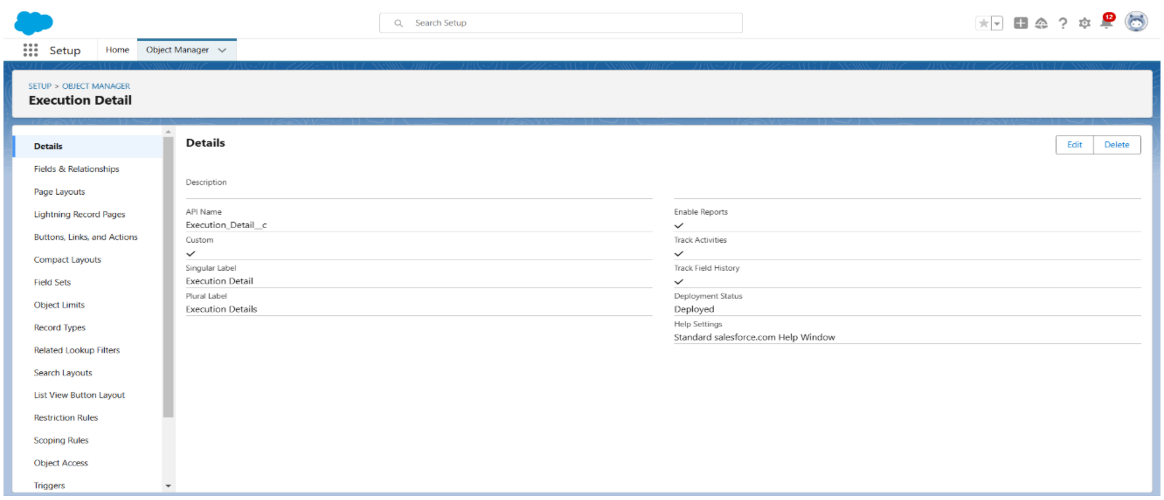


To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
2. Enter the label name >> Execution Detail
3. Plural label name >> Execution Details
4. 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.



Tabs

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

Types of Tabs:

Custom Tabs

Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

Web Tabs

Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

Visualforce Tabs

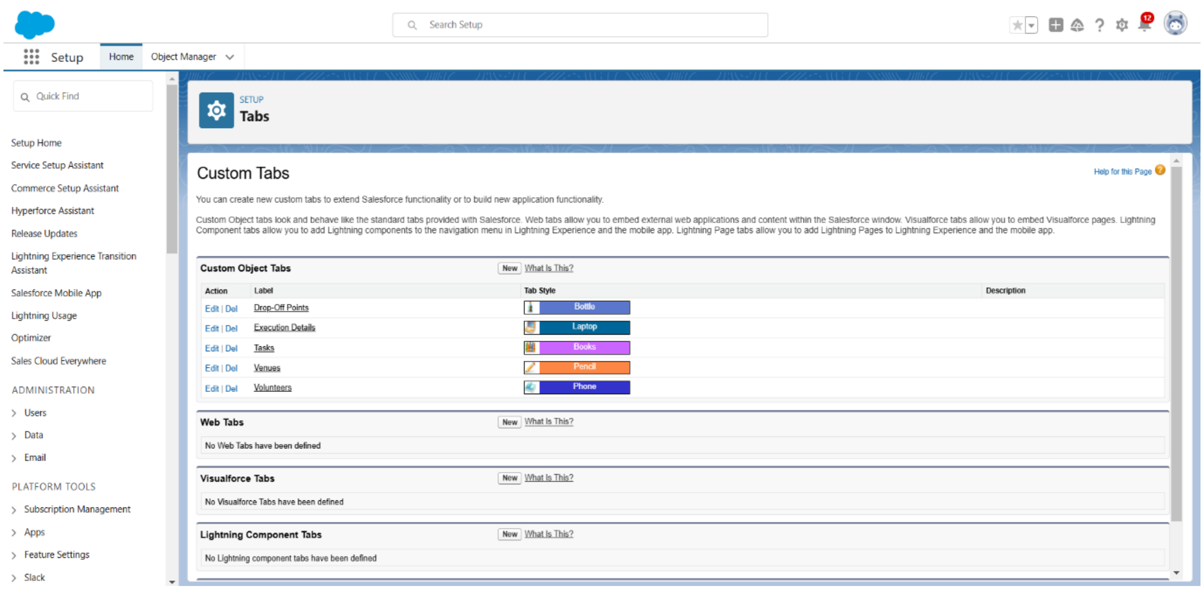
Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

Lightning Component Tabs

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page Tabs Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu. Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

To create a Tab:(Venue,“Drop-Off Point, Task, Volunteer, Execution Details”.)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)



1. 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 .
2. Make sure that the Append tab to users' existing personal customizations is checked.
3. Click save

The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps. To create a lightning app page:

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

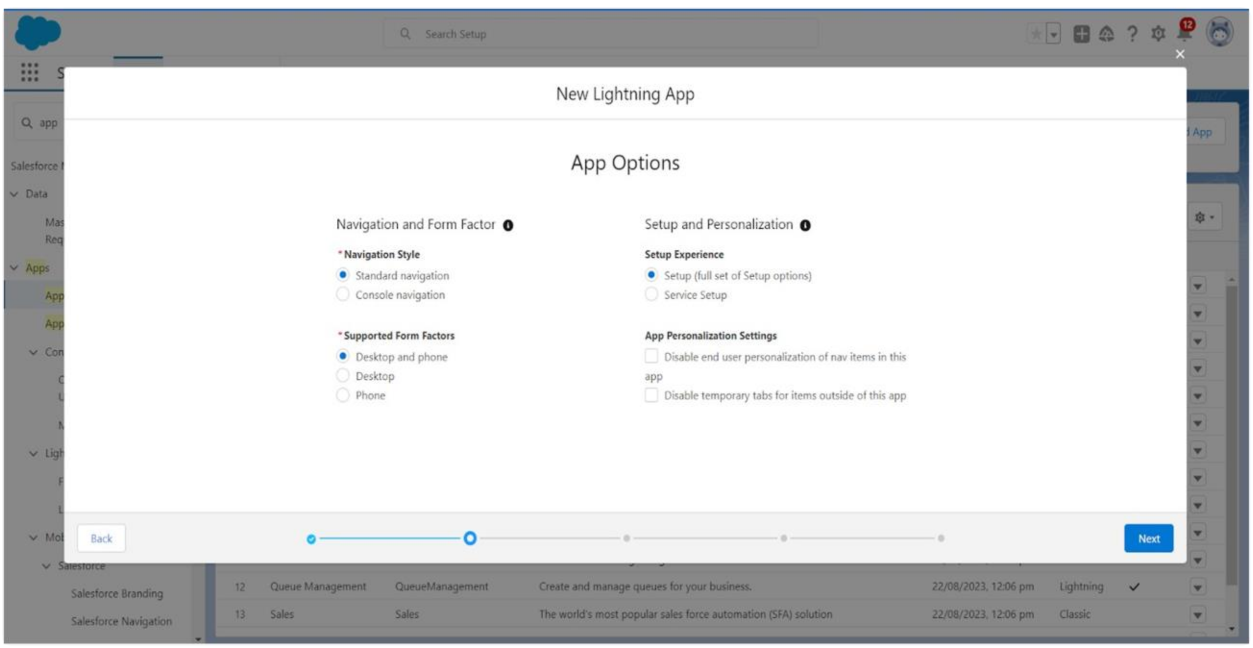
2. Fill the app name in app details and branding as follow

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.

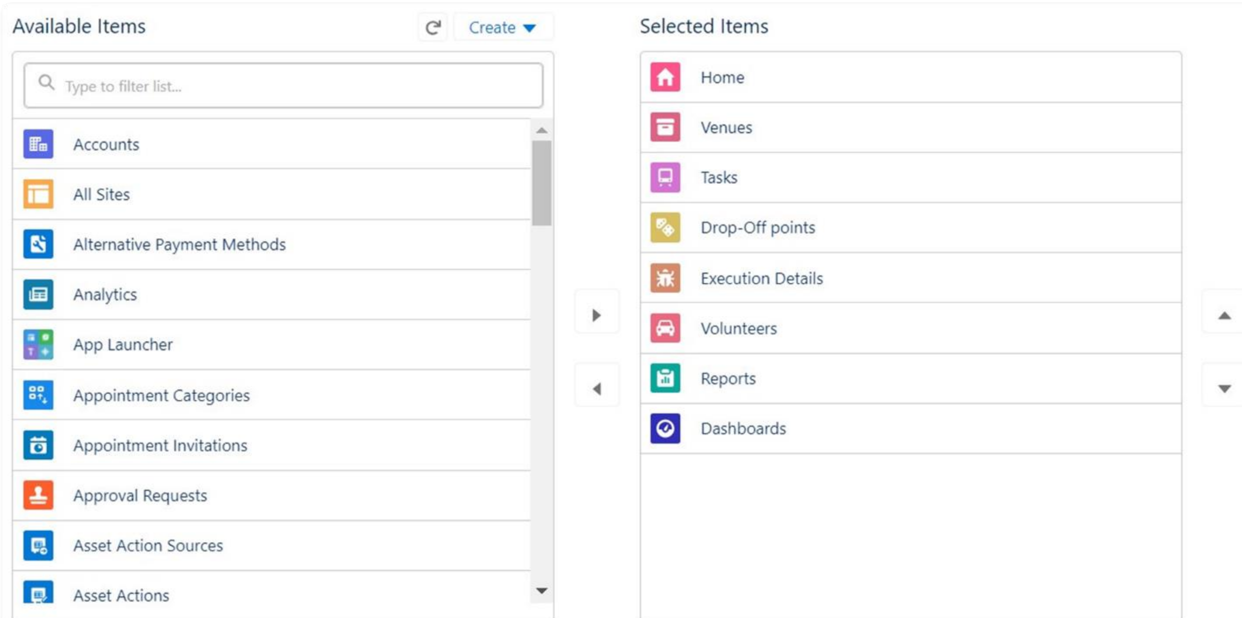


4.(Utility Items) keep it as default >> Next.

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:



Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker. Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is anon required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in everySalesforce application. They are,

1. Created By
2. Owner
3. Last Modified
4. Field Made During object Creation

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. Itmeans you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

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
4. Select the related object "Drop-Off point" and click next.
5. Field Name : Drop_Off_point
6. Field label : Auto generated
7. Next >> Next >> Save.

Creation of Master Detail Relationship Field on Execution Details Object :

8. Go to setup >> click on Object Manager >> type object name(Execution Details) in the search bar >> click on the object.
9. Now click on "Fields & Relationships" >> New
10. Select Master Detail relationship
11. Select the related object "Volunteer" and click next.
12. Field Name : Volunteer
13. Field label : Auto generated
14. Next >> Next >> Save.

Creation of Master Detail Relationship Field on Execution Details Object :

15. Go to setup >> click on Object Manager >> type object name(Execution Details) in the search bar >> click on the object.
16. Now click on "Fields & Relationships" >> New
17. Select Master Detail relationship
18. Select the related object "Task" and click next.

19. Field Name : Task
20. Field label : Auto generated
21. Next >> Next >> Save.

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

22. Go to setup >> click on Object Manager >> type object name(Drop-Off Point) in the search bar >> click on the object.
23. Now click on “Fields & Relationships” >> New
24. Select Lookup relationship
25. Select the related object “Venue” and click next.
26. Field Name : Venue
27. Field label : Venue__c
28. Next >> Next >> Save.

Creation of Lookup Relationship Field on Task Object :

29. Go to setup>> click on Object Manager >> type object name(Task) in the search bar >> click on the object.
30. Now click on “Fields & Relationships” >> New
31. Select Lookup relationship
32. Select the related object “Venue” and click next.
33. Field Name : Sponsored By
34. Field label : Auto generated
35. Next >> Next >> Save.

Creation of Lookup Relationship Field on Task Object :

36. Go to setup>> click on Object Manager >> type object name(Task) in the search bar >> click on the object.
37. Now click on “Fields & Relationships” >> New
38. Select Lookup relationship
39. Select the related object “Drop-Off point” and click next.
40. Field Name : Drop-Off point

41. Field label : Auto generated.

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

1. Field Name : Contact Email
2. Click on required check box
3. 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:

1. Field Label : Contact Phone
2. Field Name : Contact Phone
3. Click on required check box
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(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:

1. Field Label : Location
2. Decimal Places : 4
3. Field Name : Location
4. Description : Enter the Geolocation of your Venue
5. 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 "Long Text Area" and Click on Next
4. Fill the Above as following:
1. Field Label : Venue Location
2. Field Name : Venue_Location
3. Click on Next >> Next >> Save and new.

Creation of fields for the Drop-Off point object

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

1. Now click on "Fields & Relationships" >> New
2. Select Data type as a "Geolocation" and Click on Next
3. Fill the Above as following:
    a. Field Label : Location 2
    b. Field Name : gets auto generated
    c. Description : Enter the Geolocation of the Drop off Point
    d. Geolocation Options : select Decimal
    e. Decimal Places : 4
    f. 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(Drop-Off point) in search bar >> click on the object.
b. Now click on "Fields & Relationships" >> New
c. Select Data type as a "Formula" and Click on Next
d. Fill the Above as following:
e. Field Label : distance calculation
f. Field Name : distance_calculation
g. Formula Return Type : Number
h. Formula Options : DISTANCE(Location_2__c , Venue__r.Location__c , 'km')

i. Click on Next >> Next >> Save and new. To create another fields in an object:

4. Go to setup >> click on Object Manager >> type object name(Drop-Off point) in search bar >> click on the object.
5. Now click on "Fields & Relationships" >> New
6. Select Data type as a "Picklist" and Click on Next
7. Fill the Above as following: ● Field Label : State

1. Field Name : State
2. Enter values, with each value separated by a new line :

Andhra Pradesh
Arunachal Pradesh
Assam
Bihar
Chhattisgarh
Goa
Gujarat
Haryana
Himachal Pradesh
Jharkhand
Karnataka
Kerala
Maharashtra
Madhya Pradesh
Manipur
Meghalaya
Mizoram
Nagaland
Odisha
Punjab
Rajasthan
Sikkim
Tamil
Nadu
Tripura
Telangana
Uttar Pradesh
Uttarakhand
West Bengal
Andaman & Nicobar (UT)

Chandigarh (UT)
Dadra & Nagar Haveli and Daman & Diu (UT)
Delhi [National Capital Territory (NCT)]
Jammu & Kashmir (UT)
Ladakh (UT)
Lakshadweep
(UT) Puducherry

1. Click on required check box
2. 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(Task) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Number” and Click on Next
4. Fill the Above as following: ● Field Label : Distance

1. Field Name : Distance
2. Length : 14
3. Decimal Places : 4
4. Click on required check box
5. Click on Next >> Next >> Save and new.

Creation of fields for the Task object

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

1. Now click on “Fields & Relationships” >> New
2. Select Data type as a “Auto Number” and Click on Next
3. Fill the Above as following: ● Field Label : Task ID
   a. Display Format : TASK-{0}
   b. Starting Number : 1
   c. Field Name : gets auto generated
   d. Click on required check box
   e. 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 “Date” and Click on Next
d. Fill the Above as following:
f. Field Label : Date
g. Field Name : Date
h. Click on required check box
i. Click on Next >> Next >> Save and new.

To create another fields in an object:

4. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
5. Now click on “Fields & Relationships” >> New
6. Select Data type as a “Picklist (Multi-Select)” and Click on Next
7. Fill the Above as following:
1. Field Label : Food Category
2. Field Name : Food Category
3. Enter values, with each value separated by a new line :
   Veg
   Non-Veg
   Salad
   Snack
4. Click on required check box
5. 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(Task) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Number” and Click on Next
4. **Fill the Above as following:**
1. Field Label : Number of People Served
2. Field Name : Number_of_People_Served
3. Click on required check box
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(Task) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Text” and Click on Next
4. Fill the Above as following:

1. Field Label : Name of the Person
2. Field Name : Name_of_the_Person
3. 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(Task) 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:

1. Field Label : Phone
2. Field Name : Phone
3. 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(Task) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Pick List” and Click on Next
4. Fill the Above as following:

1. Field Label : Rating
2. Field Name : Rating
3. Enter values, with each value separated by a new line :
   1
   2
   3
   4
   5

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(Task) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Long Text Area” and Click on Next
4. Fill the Above as following:

1. Field Label : Feedback
2. Field Name : Feedback
3. Click on Next >> Next >> Save and new.

Creation of fields for the Volunteer object

1. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Auto Number” and Click on Next
4. **Fill the Above as following:**
    a. Field Label : Volunteer ID
    b. Field Name : gets auto generated
    c. Click on required check box
    d. Click on Next >> Next >> Save and new.
    e. 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(Volunteer) in search bar >> click on the object.
b. Now click on “Fields & Relationships” >> New
c. Select Data type as a “Picklist” and Click on Next
d. Fill the Above as following:
f. Field Label : Gender
g. Field Name : Gender
h. Enter values, with each value separated by a new line :

Female
Male

i. 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(Volunteer) in search bar >> click on the object.
6. Now click on “Fields & Relationships” >> New
7. Select Data type as a “Date” and Click on Next
8. Fill the Above as following: ● Field Label : Available On

1. Field Name : Available On
2. Click on required check box
3. 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(Volunteer) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Number” and Click on Next
4. Fill the Above as following:

1. Field Label : Age
2. Field Name : Age
3. Click on required check box
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(Volunteer) 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 Following:

- Field Label : Email
- Field Name : Email

1. Click on required check box
2. Click on Next>> Next >> Save and new.

Smart Internz

SMARTBRIDGE a Virondo Enterprise PARTNER

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Number” and Click on Next
4. Fill the Above as following:

1. Field Label : Contact Number
2. Field Name : Contact_Number
3. Click on required check box
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(Volunteer) in search bar >> click

   on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Text Area (Long)” and Click on Next
4. Fill the Above as following:

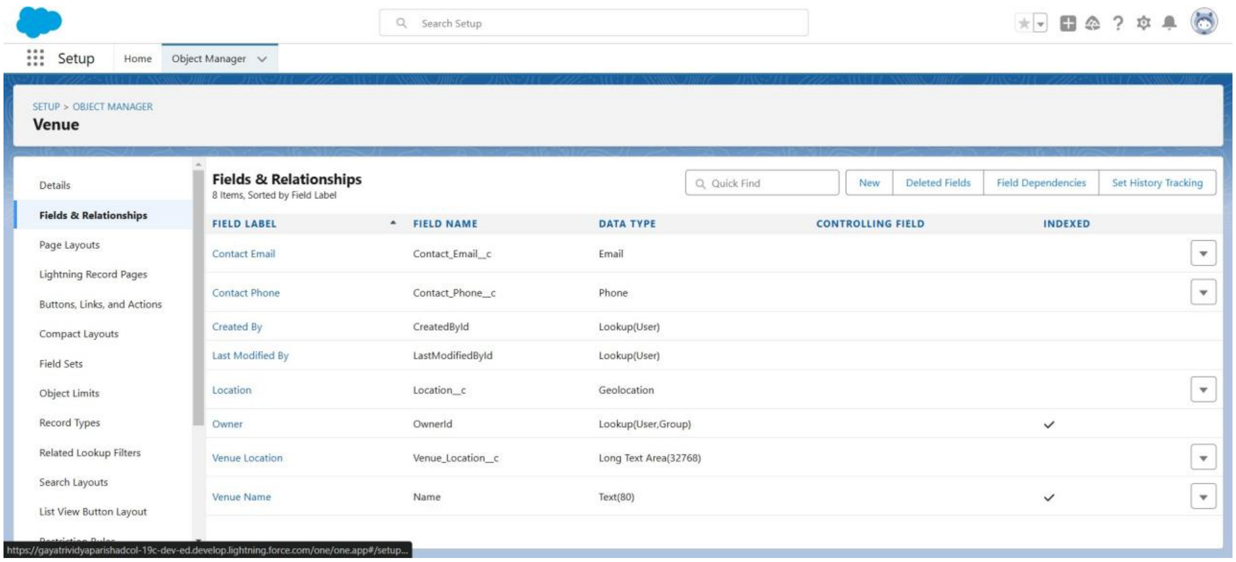
1. Field Label : Address
2. Field Name : Address
3. Click on Next >> Next >> Save and new.

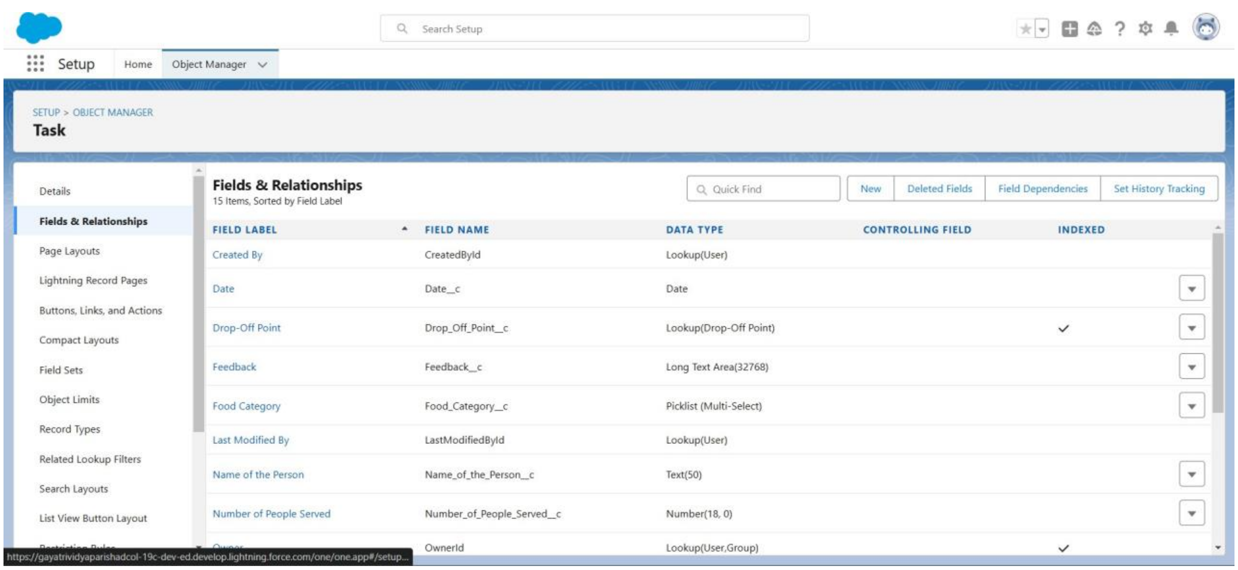
To create another fields in an object:

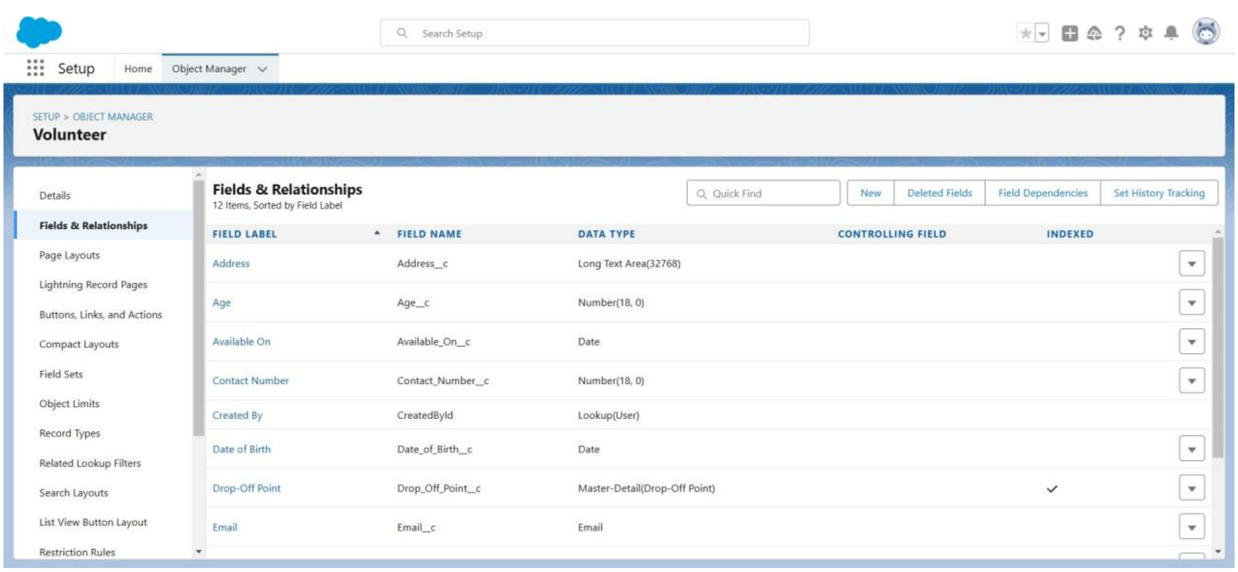
1. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Date” and Click on Next
4. Fill the Above as following: ● Field Label : Date of Birth

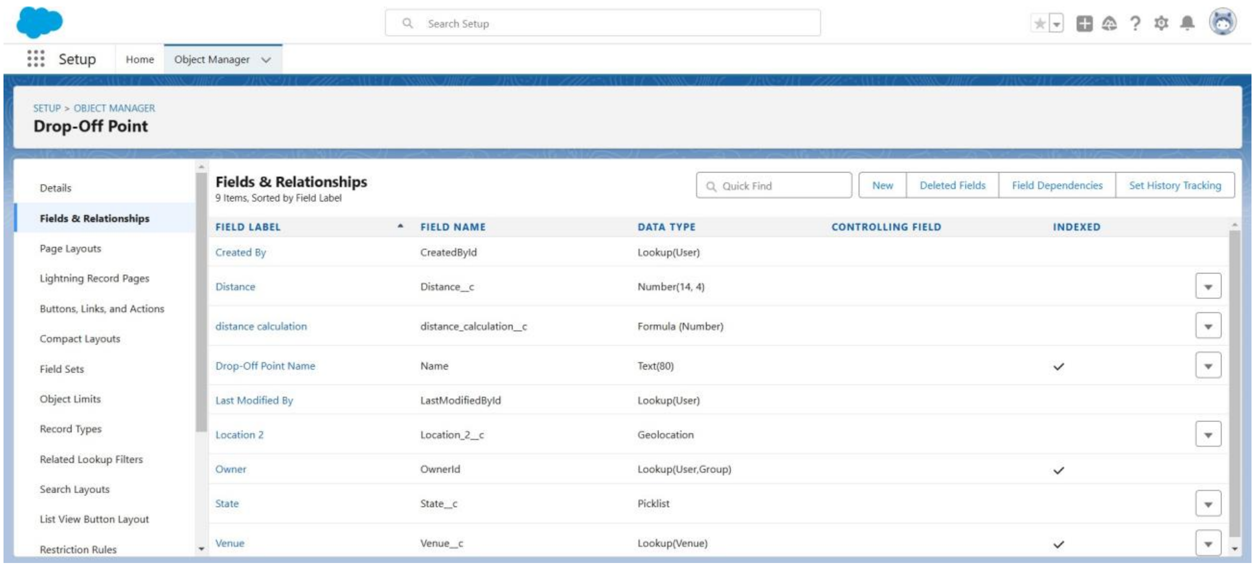
● Field Name : Date_of_Birth

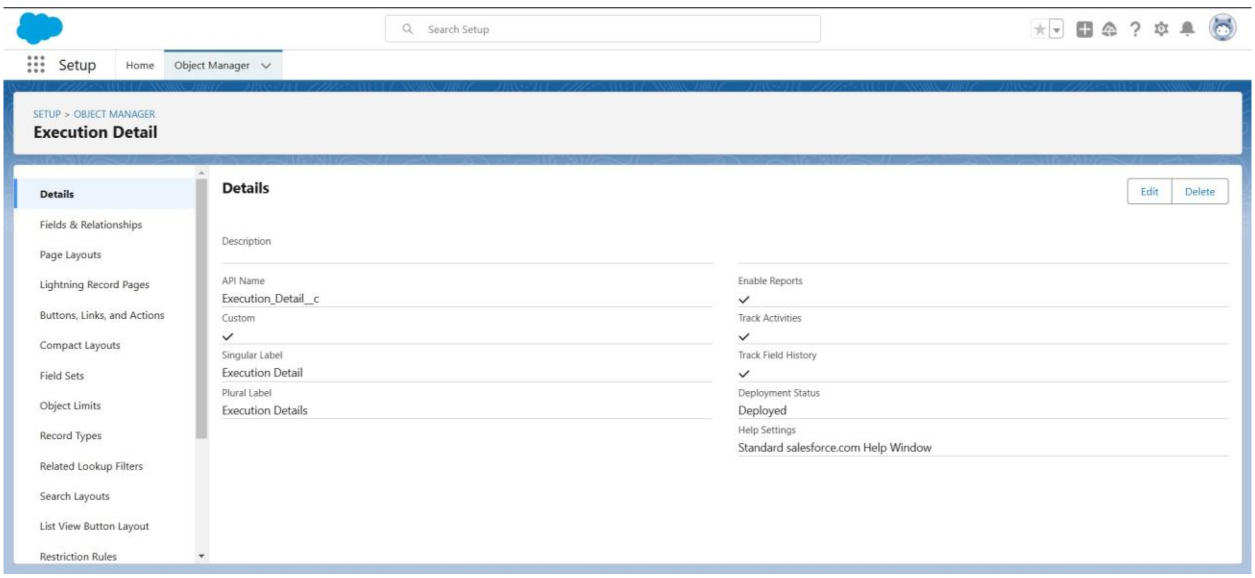
Click on Next >> Next >> Save and new.


Search Setup
Setup
Home
Object Manager
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
Fields & Relationships
8 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED
Contact Email | Contact_Email__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(32768)
Venue Name | Name | Text(80) | ✓
https://gayatrividyaparishadcol-19c-dev-ed.develop.lightning.force.com/one/one.app#/setup...


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Task
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Fields & Relationships
15 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)
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(50)
Number of People Served | Number_of_People_Served__c | Number(18, 0)
Owner | OwnerId | Lookup(User,Group) | ✓
https://gayatrividyaparishadcol-19c-dev-ed.develop.lightning.force.com/one/one.app#/setup...

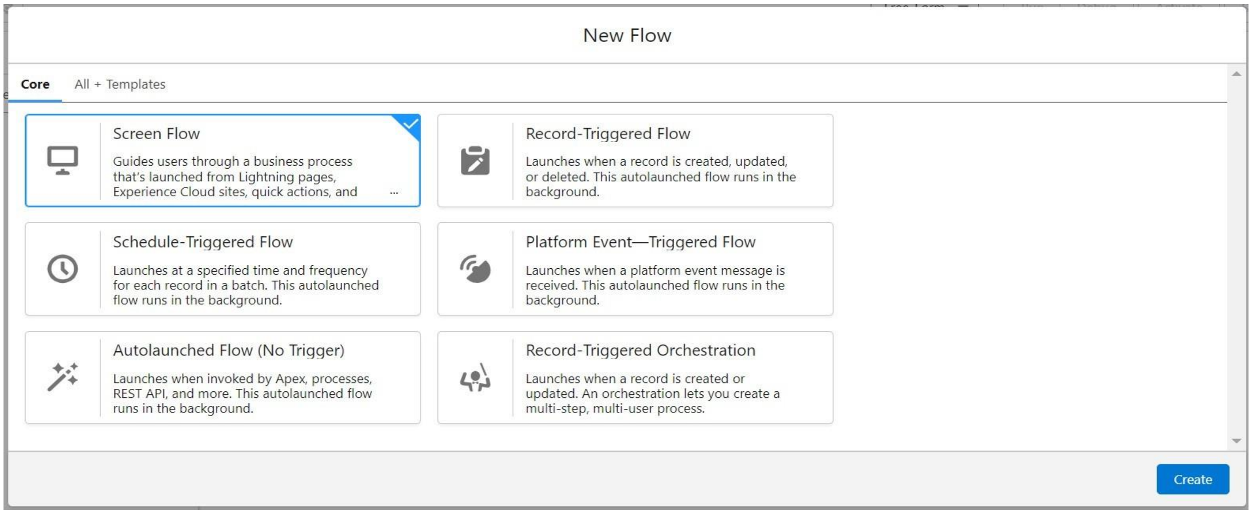

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Volunteer
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Fields & Relationships
12 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED
Address | Address__c | Long Text Area(32768)
Age | Age__c | Number(18, 0)
Available On | Available_On__c | Date
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





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.



1. Click on the '+' icon in between start and end, and click on screen element.
2. Under the Screen Properties:

   Label : Venue Details

   API Name : Venue_Details
3. Now lets add components in this flow. Click on Text Component and name it as: Label : Venue Name

   API Name : Venue_Name
4. Click on Email Component and name it as: Label : Email

   API Name : Contact_Email
5. Click on Phone Component and name it as: Label : Phone

   API Name : Contact_Phone
6. Click on Text Component and name it as: Label : Venue Location

   API Name : Venue_Location
7. Click on Number Component and name it as: Label : Latitude

   API Name : Latitude
8. Click on Number Component and name it as:

   Label : longitude

   API Name : longitude
9. Next click on Done. This would like below
10. Click on the '+' icon in between Venue details and end, and click on create record element. 13. Now label it as

    Label : Create Venue Record

    API Name : Create_Venue_Record

    How Many Records to Create : One

How to Set the Record Fields : Use separate resources, and literal values

Object : Venue

Set Field Values for the Venue : Click on ‘Add Field’ 5 times

Field : Value = Contact_Email__c : {!Contact_Email.value}

Field : Value = Contact_Phone__c : {!Contact_Phone.value}

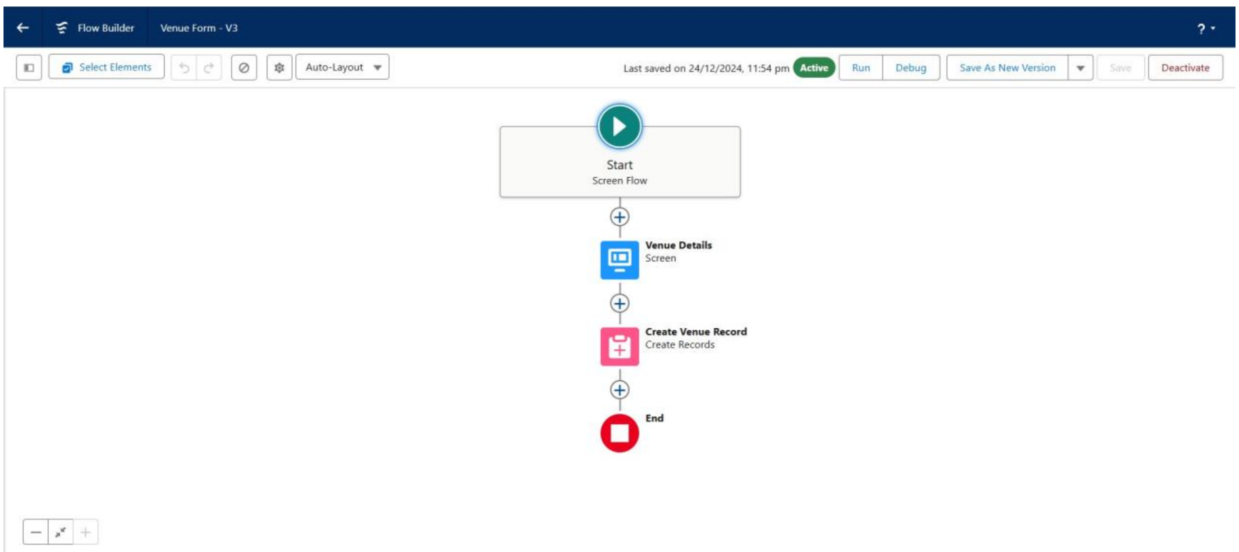
Field : Value = Name : {!Venue_Name}

Field : Value = Venue_Location__c : {!location}

Field : Value = Location__Latitude__s : {!latitude}

Field : Value = Location__Longitude__s : {!longitude}

☆ This would look like:

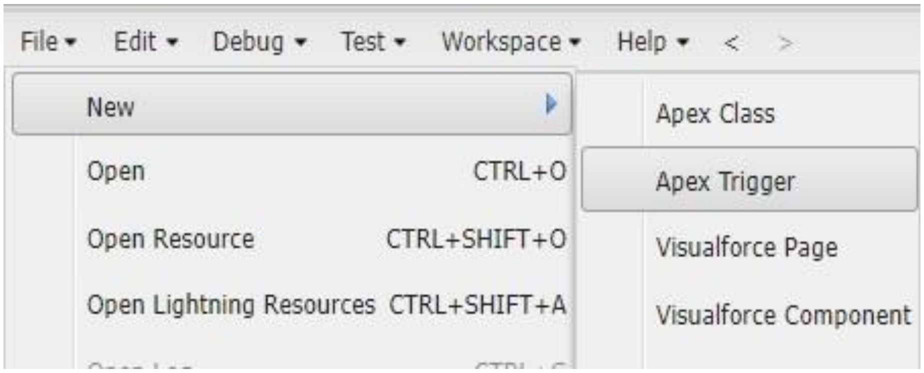


☆ Click on Save as: Flow Label : Venue Form

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.



1. Enter Name : DropOffTrigger sObject: Drop-Off Point
2. Click on Submit.

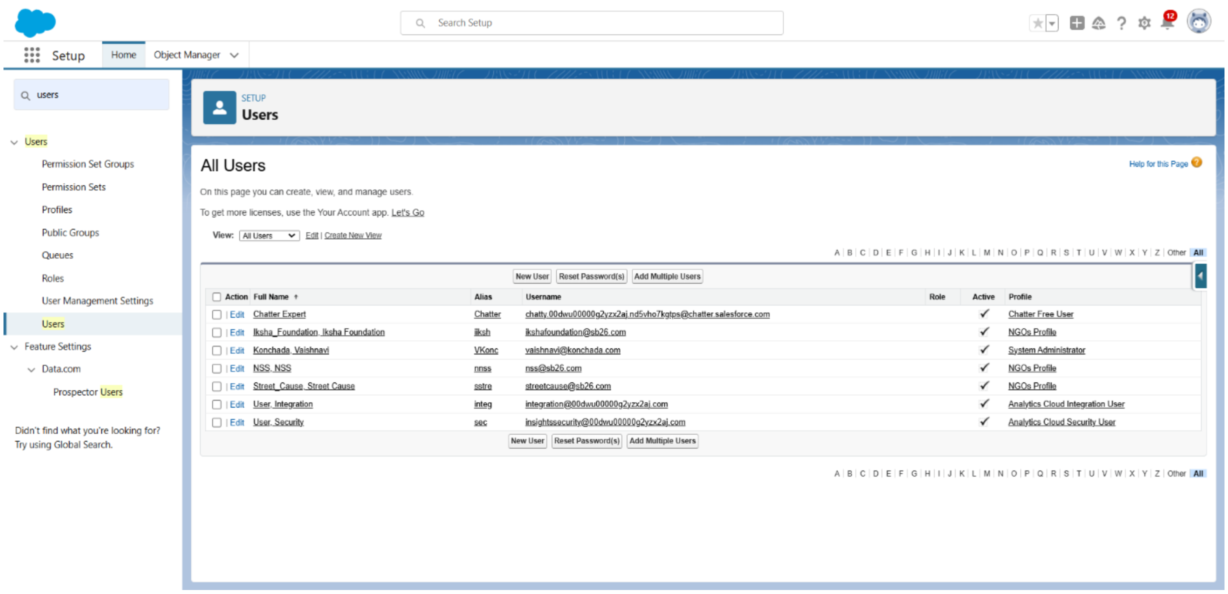
Profiles

A profile is a group/collection of settings and permissions that define what a user can do in salesforce.Profile controls "Object permissions, Field permissions, User permissions, Tab settings,App settings, Apex class access, Visual force page access, Page layouts, Record Types,Login hours & Login IP ranges.You can define profiles by the user's job function. For example System Administrator,Developer, Sales Representative.

1. Go to setup page >> type Profiles in Quick Find bar >> click on Profiles >> click on 'S'
2. Click on Clone beside Standard Platform User.

3. Under Clone Profile: Profile Name : NGOs Profile

Then click on Save



Creation of Users

In our Project we consider them as NGO's

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

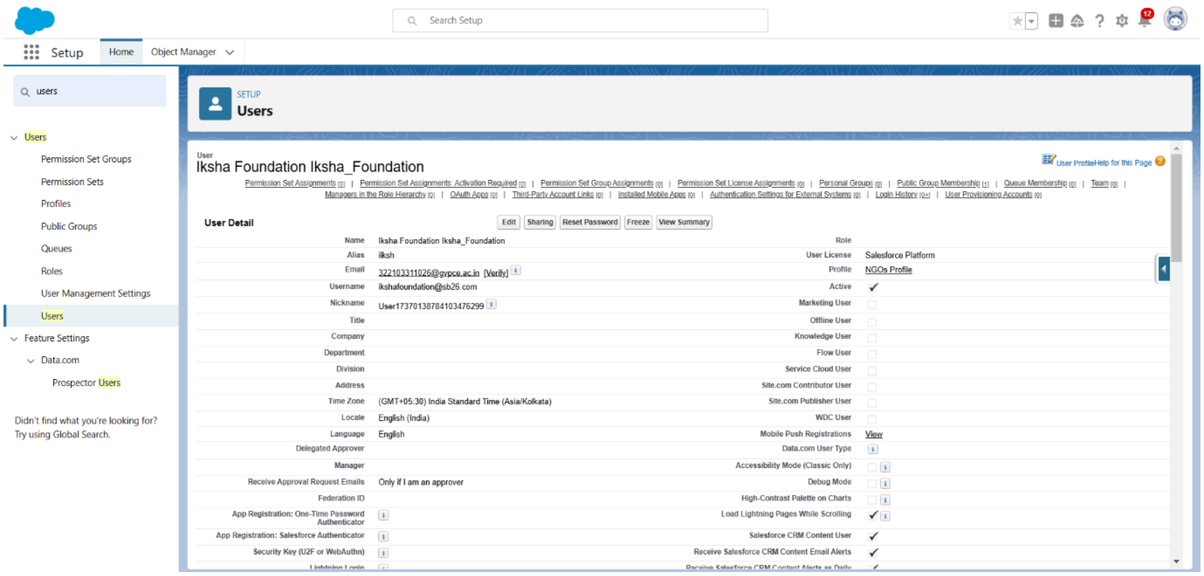
Email : Give Your Email

Username : ikshafoundation@sb.com (give the username different) Nickname : Auto Populated

User License : Salesforce Platform

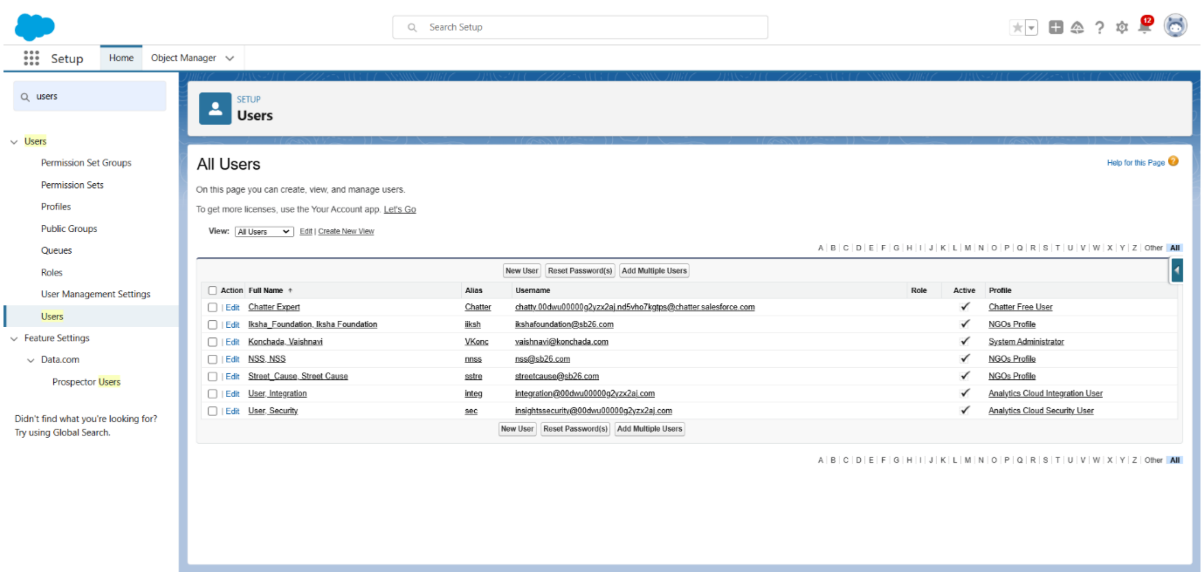
Profile : NGOs Profile

Active: Check



3. Click on Save

Give Different First Name, Last Name based on Different NGO's.



Creation of Public Group

1. Go to setup page >> type Public Groups in Quick Find bar >> click on Public Groups >> click on New.
2. Under Group Information:

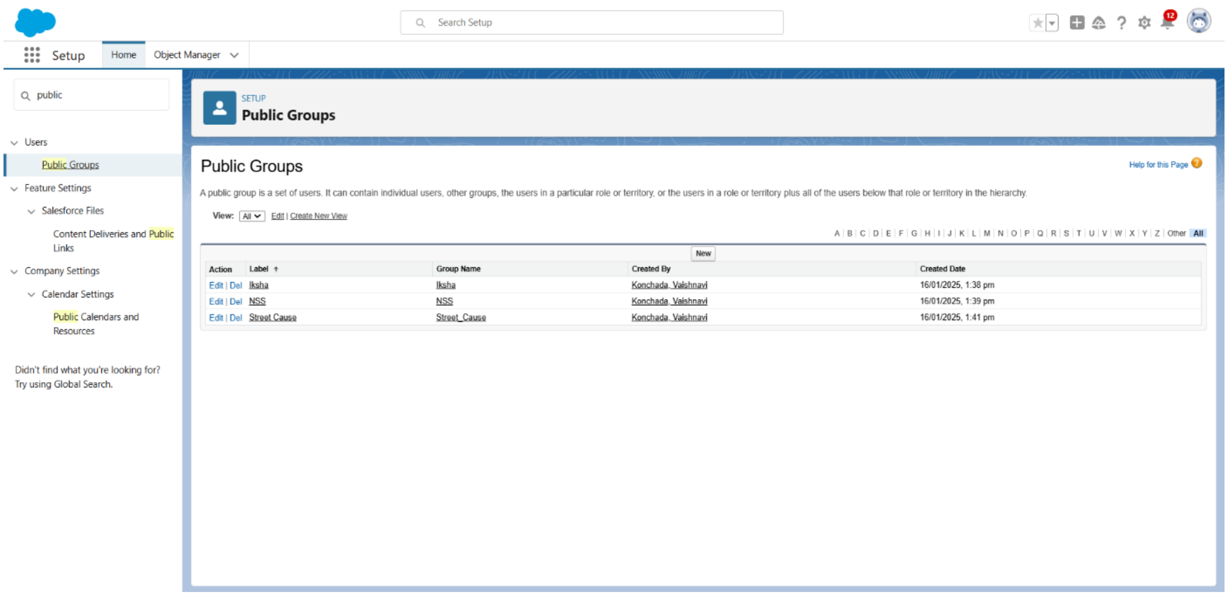
   Label : Iksha

   Group Name : Iksha

   Grant Access Using Hierarchies : Check

3. In Search, Select Users.
4. In Selected Members Add Iksha Foundation and System Administrator

Do the same foe remaining two NGO's



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

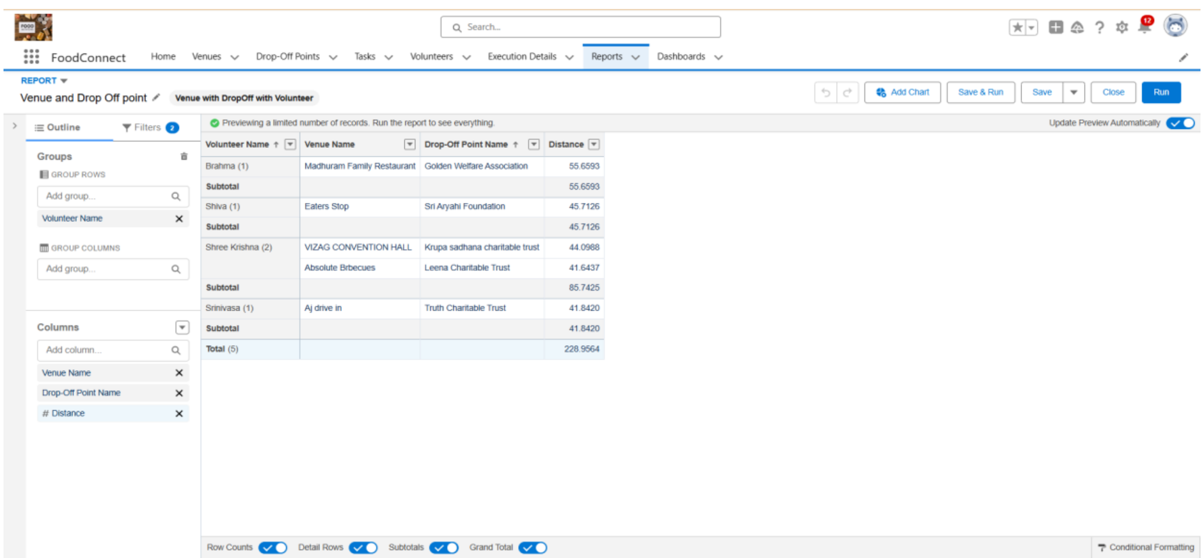
   Deployment Status : Deployed
3. Click on Next
4. Near Click to relate another Object Select Drop-Off Points.
5. And also select "A" records may or may not have related "B" records.
6. Now again Near Click to relate another Object Select Volunteers.
7. Now click on Save.

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
3. Open Custom Reports and click on New Report
4. Select Report Type : Venue with DropOff with Volunteer
5. Then click on Start Report.
6. In GROUP ROWS : Add Volunteer Name
7. In Columns : Add Venue Name, Drop-Off point Name, Distance.



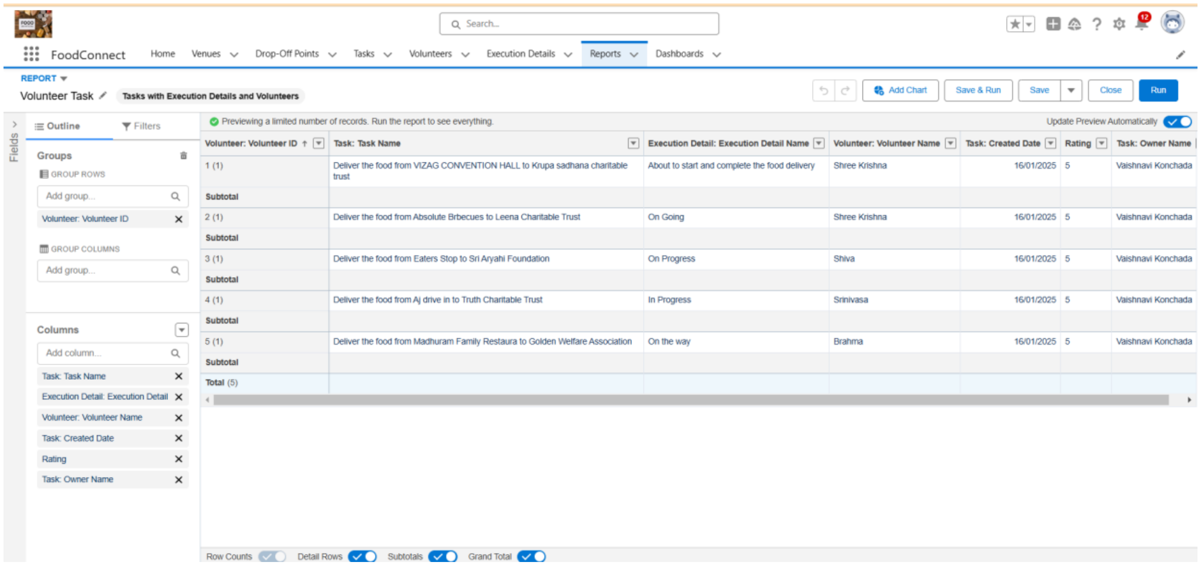
8. Now click on Save & Run.
9. Give Label as :
10. Report Name : venue and Drop Off point
11. Report Unique Name : Auto Populated
12. Click on Select Folder and select Custom Report, then click on Save.

Creation of Report on Volunteers with Execution Details and Tasks

1. Go to the app(FoodConnect) >> click on the reports tab
2. Click on Custom Reports Folder and click on New Report
3. Select Report Type : Volunteers with Execution Details and Tasks.
4. Then click on Start Report.
5. In GROUP ROWS : Volunteer ID

6. In Columns : Add Volunteer : Volunteer Name, Task : Task Name, Execution Detail : Execution

   Detail Name, Volunteer: Owner Name, Task: Date, Task : Rating.



7. Now click on Save & Run.
8. Give Label as :

   Report Name : Volunteer Task

   Report Unique Name : Auto Populated

Click on Select Folder and select Custom Report, then click on Save.

Adding venue and Drop Off point Report to the Dashboard

1. Go to the app(FoodConnect) >> click on the Dashboards tab.
2. Click on New Folder.

   Folder Label : Custom Dashboards

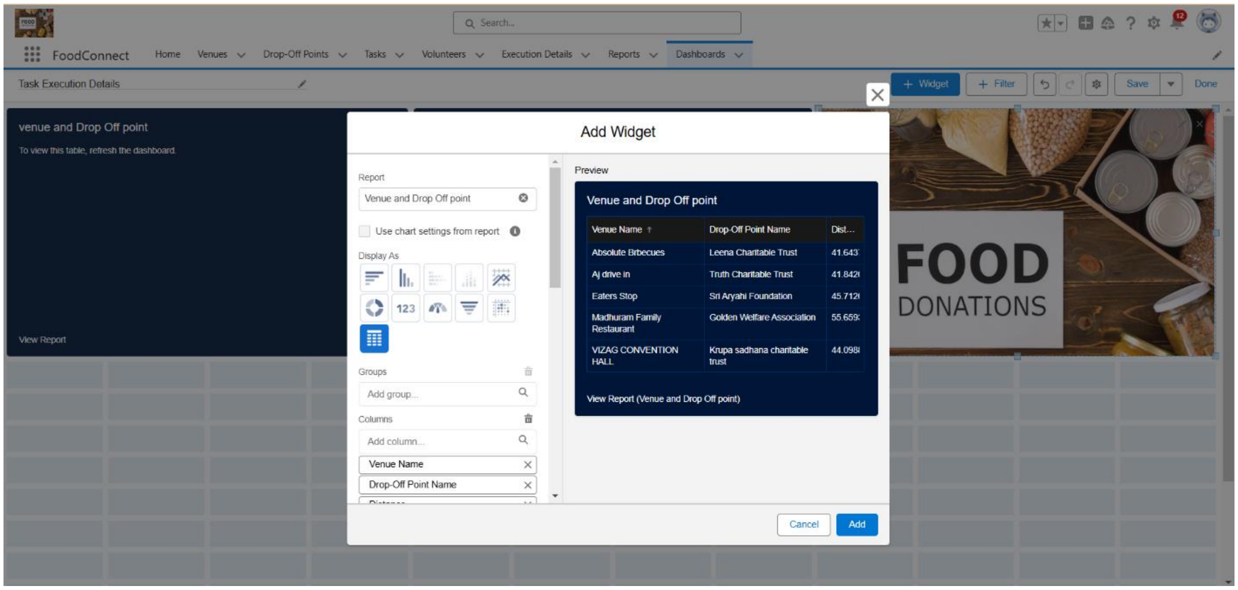
   Folder Unique Name : Auto Populated

3. Open Custom Dashboards and click on New Dashboards
4. Name : Organization Details
5. Click on Widget and select Chart or Table
6. In Select Report : Select venue and Drop Off point Report.
7. Then click on select
8. In Add Component:

   Display As : Select Lightning Table

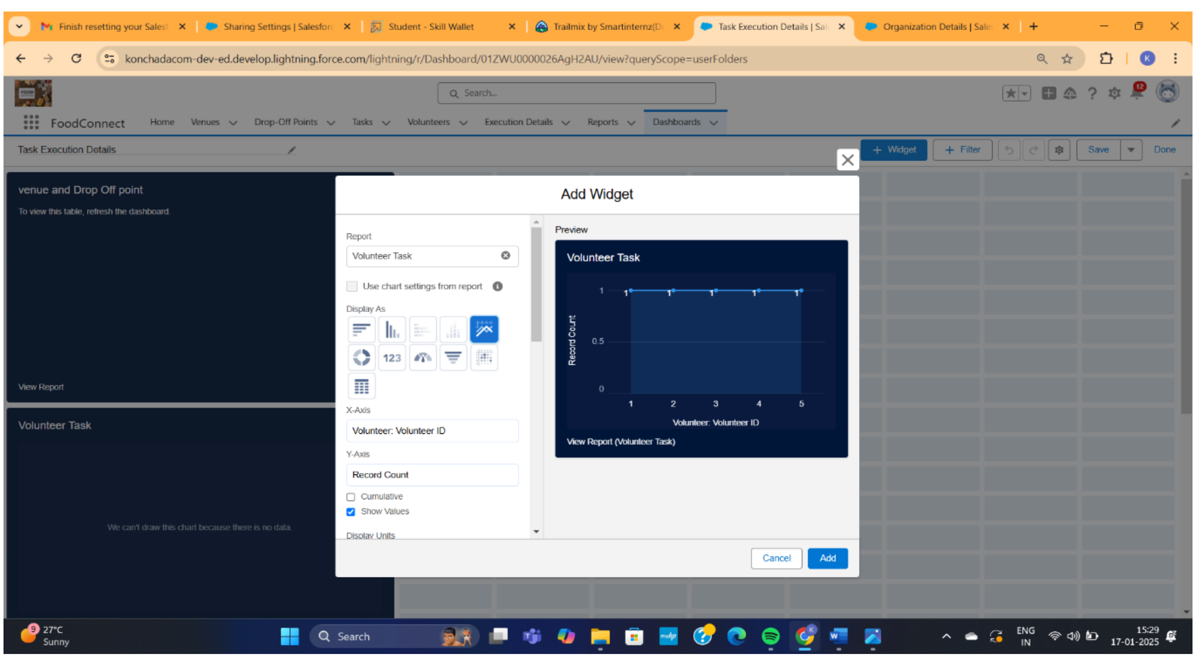
   Component Theme : Select Dark

(Optional)



Adding Volunteer Task Report to the Dashboard

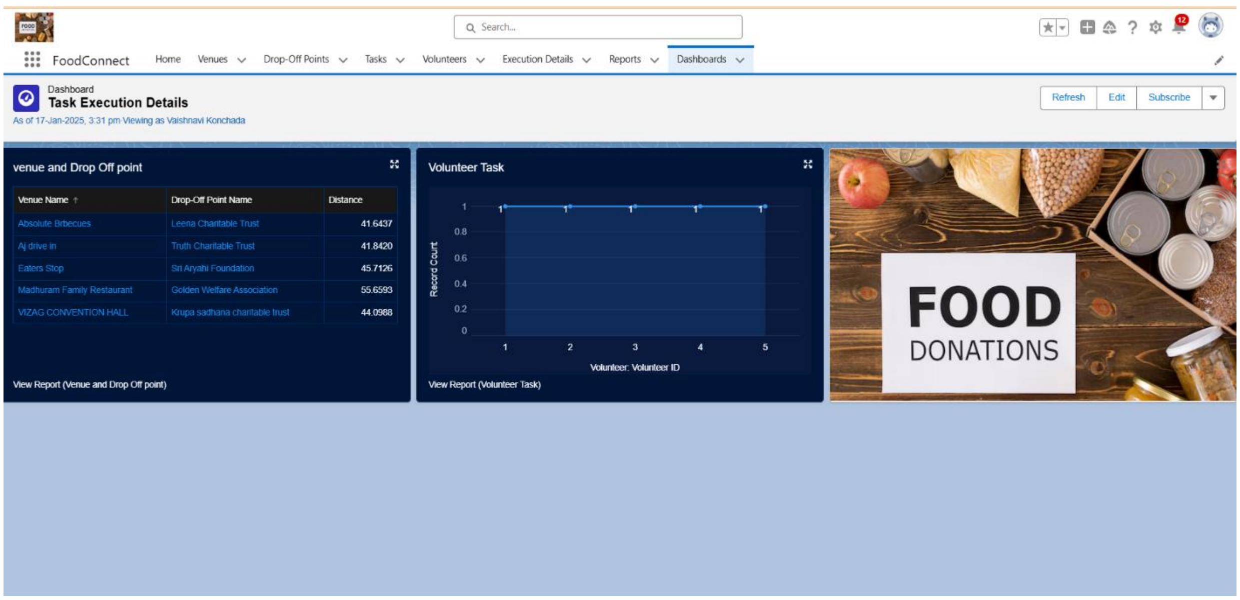
1. Click on Widget and select Chart or Table
2. In Select Report : Select Volunteer Task Report.
3. Then click on select
4. In Add Component: Display As : Select Line Chart



Adding a Picture to the Dashboard (Optional)

(Note : To upload an image into the Dashboard, we have to first download an image from google or other sources into your system)

1. Click on Widget and select Image. Then click on Browse Files.
2. Then Select the Picture you want to upload in this Dashboard.
3. Then click on Save As : Name : Task Execution Details
   Click on Select Folder and select Custom Dashboards
4. Click on Select Folder and then 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

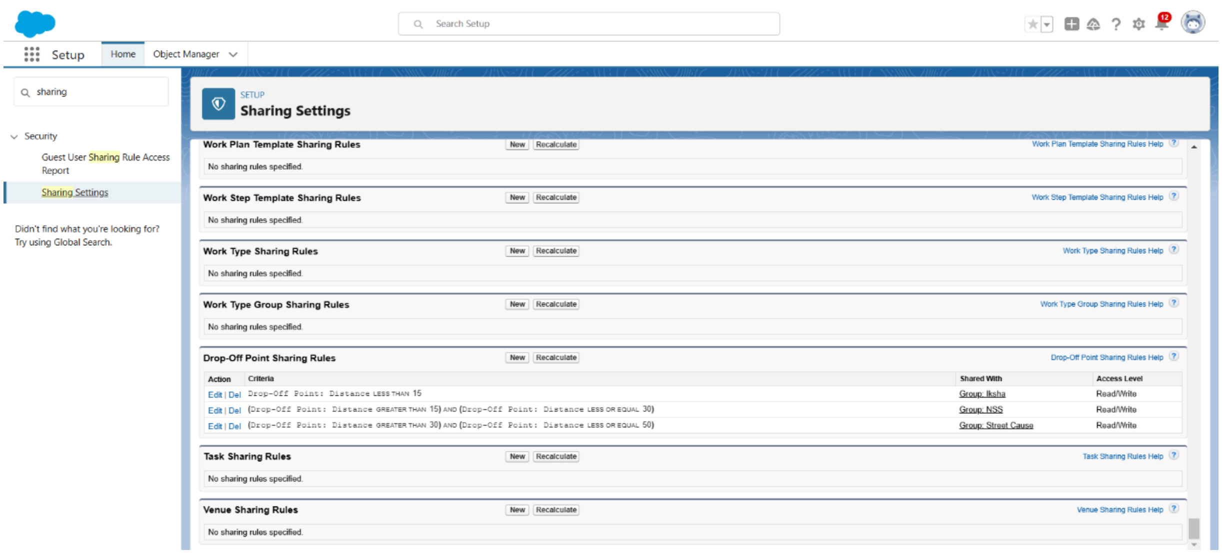
    Rule Name : Rule_3

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

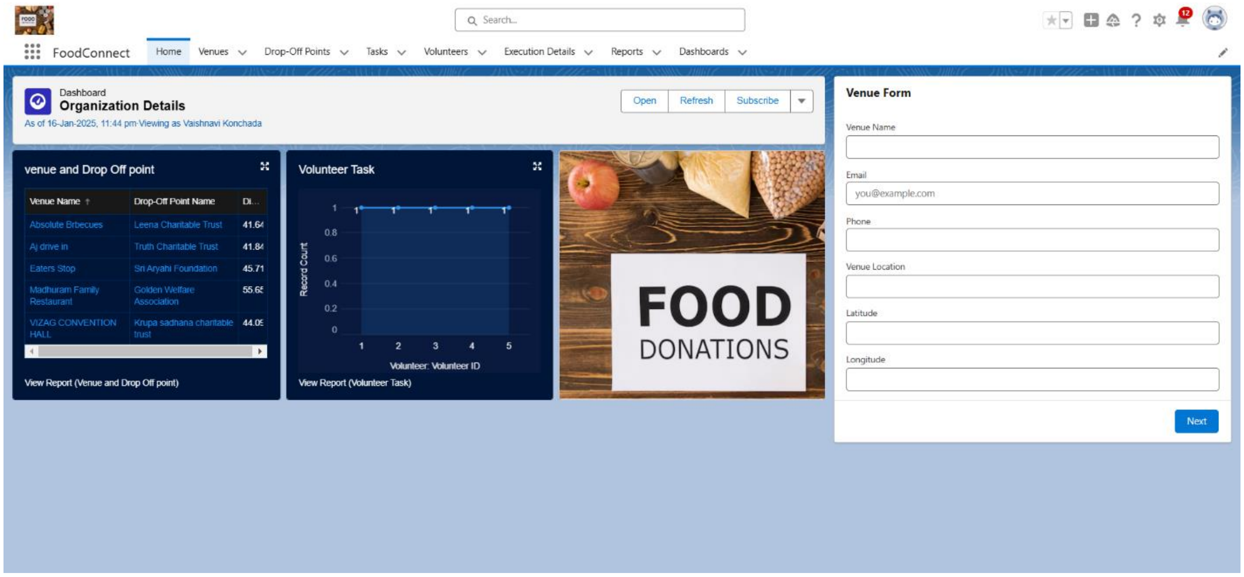
16. Select the users to share with : Near Share With

    Public Groups : Street Cause



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.



Conclusion

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 resources.