SALESFORCE SUPPORTED VIRTUAL INTERNSHIP PROGRAM Developer VIP 2024 Cohort-3

GUIDED PROJECT:

Food Connect App-To Supply Leftover Food to Poor

DONE BY:

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1. Project Overview

The "Food Connect" project is dedicated to developing a Salesforce-based application designed to streamline the distribution of surplus food from donors to underprivileged communities. By harnessing the power of Salesforce's robust platform, this application aims to enhance operational efficiency, improve data accuracy, and deliver actionable insights into the food donation and distribution processes.

Addressing Food Wastage and Hunger:

Food Connect is specifically designed to tackle the critical issues of food wastage and hunger. The application automates essential functions, including:

- Tracking Food Donations: Ensuring that all donations are logged and monitored effectively.
- **Inventory Management:** Keeping real-time tabs on available food supplies to prevent shortages or excess.
- **Volunteer Coordination:** Streamlining the management of volunteers to optimize their contributions.
- **Real-Time Reporting:** Generating insightful reports that provide visibility into operations and outcomes.

Key Challenges and Solutions:

The primary challenge this project addresses is the inefficient handling of food donations, which often results in delays and increased waste. Food Connect offers a comprehensive, user-friendly solution that promotes effective resource management, strengthens relationships with donors, and facilitates seamless reporting.

Project Goals

Through the implementation of Food Connect, we aim to achieve the following objectives:

- Operational Excellence: Automate routine processes to ensure timely collection and distribution of food, minimizing delays and maximizing impact.
- **Data-Driven Decision Making:** Provide stakeholders with real-time insights into donations, distributions, and volunteer activities, enabling informed decisions.
- Scalability and Efficiency: Develop a secure, scalable, and flexible solution that supports long-term growth and adapts to evolving needs.

By focusing on these goals, Food Connect aspires to create a sustainable and impactful solution that not only reduces food waste but also nourishes those in need.

2. Objectives:

- To provide developers with a comprehensive understanding of Salesforce development tools and best practices.
- To prepare developers for real-world application development and enhance their problem-solving skills within the Salesforce ecosystem.
- 3. Salesforce Key Features and Concepts Utilized:

- Apex programming language for backend logic and custom business processes.
- Lightning Web Components for building responsive user interfaces.
- Salesforce APIs for integrating with external systems and data sources.

4. Detailed Steps to Solution Design:

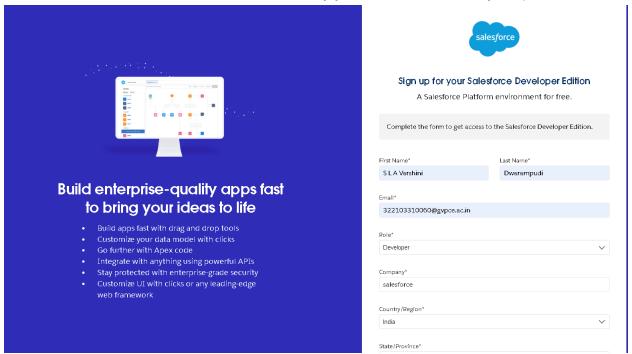
- Identify the business requirements and user stories to understand the needs of the application.
- Design the data model using Salesforce objects and relationships to ensure efficient data storage and retrieval.
- Develop Apex classes and triggers to implement business logic and automate processes.
- Create Lightning Web Components to build the user interface, ensuring a seamless user experience.
- Integrate with external systems using Salesforce APIs, ensuring data consistency and real-time updates.
- Test the application thoroughly to identify and resolve any issues before deployment.
- Deploy the solution to production and monitor its performance, making adjustments as necessary based on user feedback.

STEP-1: Salesforce developer account creation

- Now to Create a Salesforce Developer Org:
- Visit the Signup Page:
 - ▲ Go to Salesforce Developer Signup.
- > Fill Out the Signup Form:
 - ⇒ First Name: Enter your first name.
 - → Last Name: Enter your last name.
 - Email: Provide a valid email address.
 - Role: Select "Developer" from the dropdown menu.
 - Company: Enter the name of your college or company.
 - ♦ Country: Select "India" from the dropdown list.
 - ♦ Postal Code: Enter your postal code (PIN code).
 - ◆ Username: Create a unique username in the format username@organization.com. This should be a combination of your name

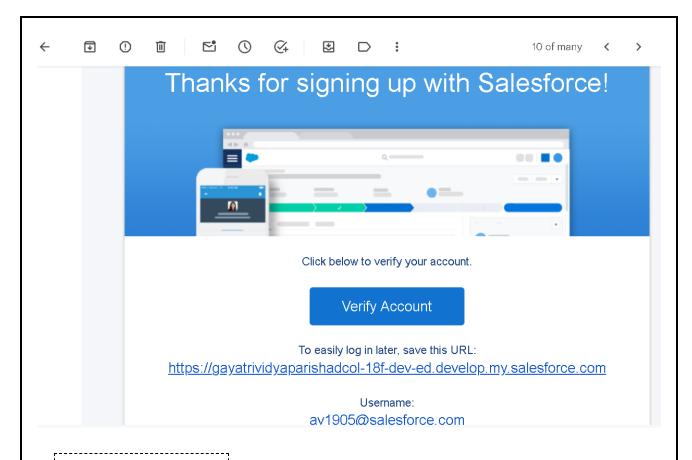
and your company (e.g., john.doe@mycollege.com).

- Complete the Signup:
 - ▲ After filling in all the required fields, click on the "Sign Me Up" button to submit your information.
- > Confirmation:
 - ▲ Check your email for a confirmation message from Salesforce. Follow the instructions in the email to verify your account and set your password.



Account Activation for Salesforce Developer Org:

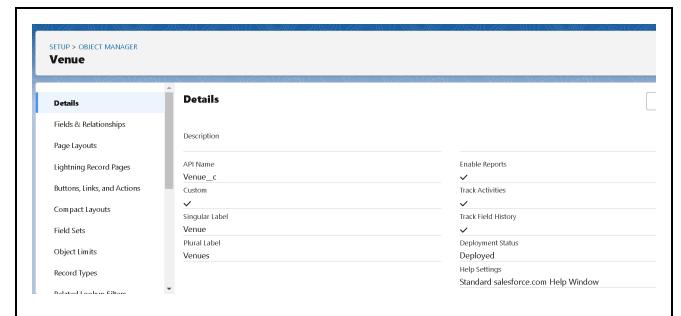
- Check Your Email:
 - ▲ Look for an email from Salesforce in the inbox of the email you used to sign up. It may take 5-10 minutes to arrive.
- Verify Your Account:
 - ▲ Click on the "Verify Account" link in the email.
- > Set Your Password:
 - Create a new password and answer a security question.
- Change Password:
 - ▲ Click on "Change Password" to complete the process.
- Access Salesforce:
 - ▲ You will be redirected to your Salesforce setup page, where you can start using your Developer Org.



STEP-2: Object

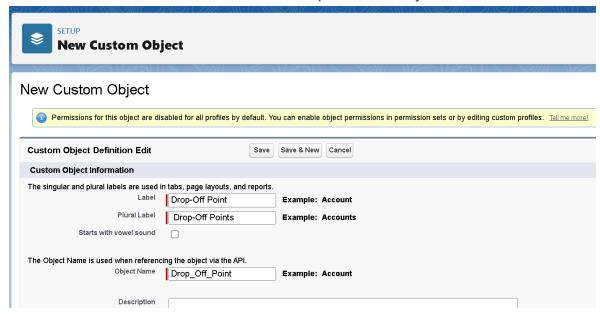
Creating a Venue Object in Salesforce:

- Navigate to Object Manager: From the Setup page, click on Object Manager.
- > Create Custom Object: Click on Create and select Custom Object.
- Enter Object Details:
 - Label: Venue
 - ⇒ Plural Label: Venues
 - → Record Name: Venue Name
 - Data Type: Text
- ➤ Set Additional Options: Check Allow Reports, Track Field History, Allow Activities, and Allow Search.
- > Save: Click Save to create the Venue object.



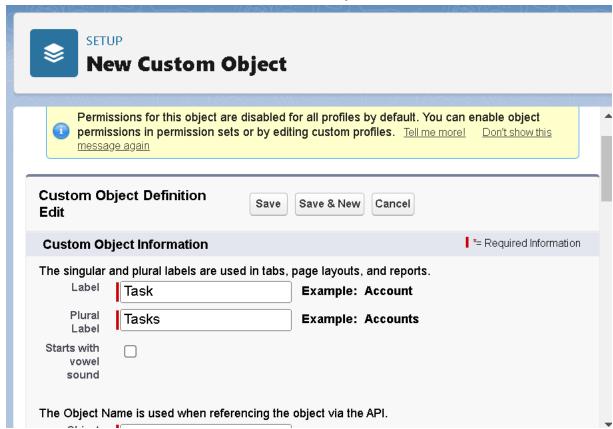
Creating a Drop-Off Point Object in Salesforce:

- Navigate to Object Manager: From the Setup page, click Object Manager.
- Create Custom Object: Click Create > Custom Object.
- Enter Object Details:
 - ⇒ Label: Drop-Off Point
 - → Plural Label: Drop-Off Points
 - Record Name: Drop-Off Point Name
 - Data Type: Text
- > Set Options: Check Allow Reports, Track Field History, Allow Activities, and Allow Search.
- > Save: Click Save to create the Drop-Off Point object.



Creating a Task Object in Salesforce:

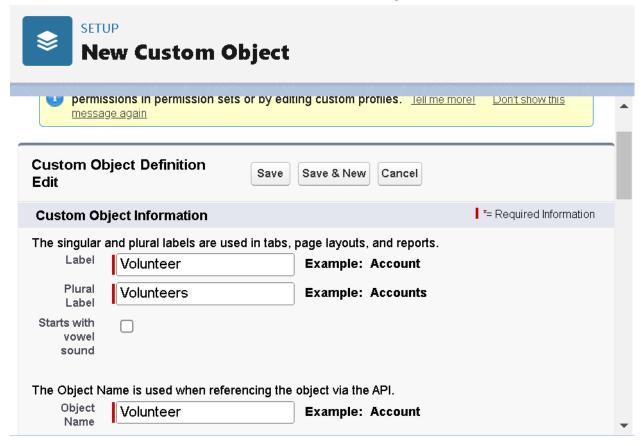
- Navigate to Object Manager: From the Setup page, click Object Manager.
- Create Custom Object: Click Create > Custom Object.
- Enter Object Details:
 - ◆ Label: Task
 - ⇒ Plural Label: Tasks
 - → Record Name: Task Name
 - Data Type: Text
- Set Options: Check Allow Reports, Track Field History, Allow Activities, and Allow Search.
- Save: Click Save to create the Task object.



Creating a Volunteer Object in Salesforce:

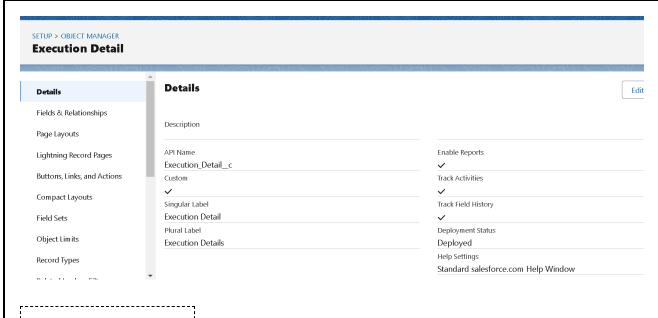
- > Navigate to Object Manager: From the Setup page, click Object Manager.
- Create Custom Object: Click Create > Custom Object.
- Enter Object Details:
 - Label: Volunteer
 - Plural Label: Volunteers

- → Record Name: Volunteer Name
- Data Type: Text
- Set Options: Check Allow Reports, Track Field History, Allow Activities, and Allow Search.
- Save: Click Save to create the Volunteer object.



Creating an Execution Details Object in Salesforce:

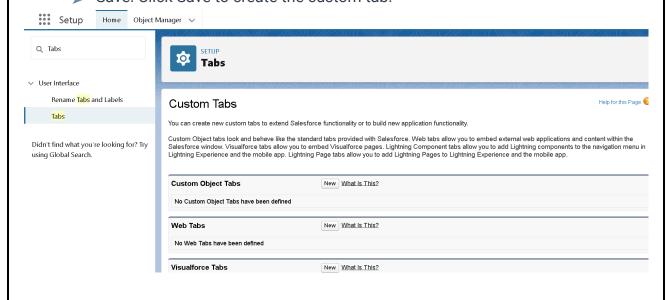
- Navigate to Object Manager: From the Setup page, click Object Manager.
- Create Custom Object: Click Create > Custom Object.
- Enter Object Details:
 - ⇒ Label: Execution Detail
 - ⇒ Plural Label: Execution Details
 - ⇒ Record Name: Execution Detail Name
 - Data Type: Text
- Set Options: Check Allow Reports, Track Field History, Allow Activities, and Allow Search.
- Save: Click Save to create the Execution Details object.



STEP-3: Tabs

Creating a Custom Tab for Venue in Salesforce:

- Navigate to Tabs: Go to the Setup page, type Tabs in the Quick Find bar, and click on Tabs.
- Create New Tab: Click New under the Custom Object Tabs section.
- Select Object: Choose Venue from the object list.
- > Select Tab Style: Pick a tab style and click Next.
- > Add to Profiles: Keep the default settings and click Next.
- ➤ Add to Custom App: Uncheck Include Tab and ensure Append tab to users' existing personal customizations is checked.
- Save: Click Save to create the custom tab.



Creating Custom Tabs for Remaining Objects:

Follow these steps to create tabs for the remaining objects: Drop-Off Point, Task, Volunteer, and Execution Details.

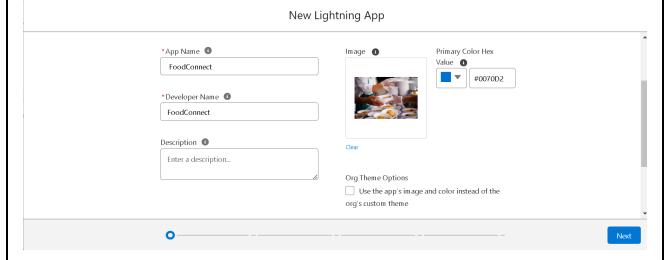
- Navigate to Tabs: Go to the Setup page, type Tabs in the Quick Find bar, and click on Tabs.
- Create New Tab: Click New under the Custom Object Tabs section.
- Select Object: Choose the object from the list (e.g., Drop-Off Point).
- Select Tab Style: Pick a tab style and click Next.
- > Add to Profiles: Keep the default settings and click Next.
- ➤ Add to Custom App: Uncheck Include Tab and ensure Append tab to users' existing personal customizations is checked.
- Save: Click Save to create the tab.



STEP-4: The Lightning App

Creating a Lightning App: FoodConnect:

- ➤ Navigate to App Manager: Go to the Setup page, search for App Manager in the Quick Find bar, and select App Manager.
- Create New Lightning App: Click New Lightning App.
 - → App Name: FoodConnect
 - Developer Name: Auto-populated
 - Image: Optional
 - ⇒ Primary Color Hex Value: Default
- Set Navigation Style: Click Next, set Navigation Style to Standard Navigation, and click Next.
- Utility Items: Keep defaults and click Next.
- ➤ Add Navigation Items: Search for and add the following items using the arrow button: Home, Venue, Drop-Off Point, Task, Volunteer, Execution Details, Reports. Click Next.
- ➤ Add User Profiles: Search for System Administrator, click the arrow button, then click Save & Finish.



STEP-5: Fields

- Creation of Relationship Fields in Salesforce Objects:
- >> Creating a Lookup Relationship Field on the Volunteer Object:
 - > Navigate to Volunteer Object: Go to Setup, click on Object Manager, and

search for Volunteer.

- > Access Fields & Relationships: Click on Fields & Relationships, then click New.
- > Select Relationship Type: Choose Master-Detail Relationship and click Next.
- Select Related Object: Choose Drop-Off Point and click Next.
- > Field Details:

Field Name: Drop_Off_PointField Label: Auto-generated

Finish: Click Next, then Next, and finally Save.

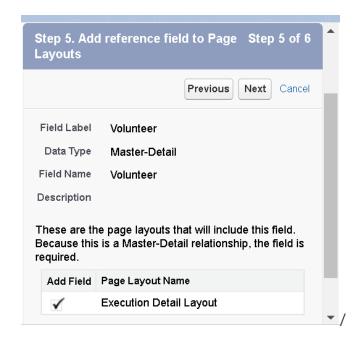
>> Creating a Master-Detail Relationship Field on the Execution Details Object:

- Navigate to Execution Details Object: Go to Setup, click on Object Manager, and search for Execution Details.
- Access Fields & Relationships: Click on Fields & Relationships, then click New.
- > Select Relationship Type: Choose Master-Detail Relationship and click Next.
- Select Related Object: Choose Volunteer and click Next.
- > Field Details:

⇒ Field Name: Volunteer

⇒ Field Label: Auto-generated

Finish: Click Next, then Next, and finally Save.



- Creating a Master-Detail Relationship Field on the Execution Details Object (for Task):
 - Navigate to Execution Details Object: Go to Setup, click on Object Manager, and search for Execution Details.
 - Access Fields & Relationships: Click on Fields & Relationships, then click New.
 - > Select Relationship Type: Choose Master-Detail Relationship and click Next.
 - Select Related Object: Choose Task and click Next.
 - > Field Details:
 - ⇒ Field Name: Task
 - ⇒ Field Label: Auto-generated
 - Finish: Click Next, then Next, and finally Save.

>> Creating a Lookup Relationship Field on the Drop-Off Point Object:

- Navigate to Drop-Off Point Object: Go to Setup, click on Object Manager, and search for Drop-Off Point.
- Access Fields & Relationships: Click on Fields & Relationships, then click New.
- > Select Relationship Type: Choose Lookup Relationship and click Next.
- Select Related Object: Choose Venue and click Next.
- > Field Details:
 - ⇒ Field Name: Venue
 - ⇒ Field Label: Venue c
- Finish: Click Next, then Next, and finally Save.

>> Creating a Lookup Relationship Field on the Task Object:

- Navigate to Task Object: Go to Setup, click on Object Manager, and search for Task.
- > Access Fields & Relationships: Click on Fields & Relationships, then click New.
- Select Relationship Type: Choose Lookup Relationship and click Next.
- Select Related Object: Choose Venue and click Next.
- > Field Details:
 - ⇒ Field Name: Sponsored By
 - ⇒ Field Label: Auto-generated
- Finish: Click Next, then Next, and finally Save.

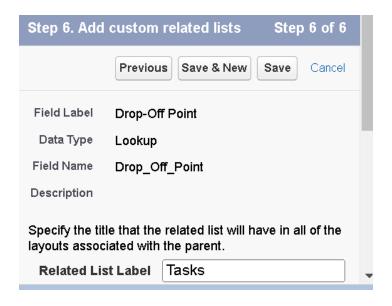
>> Creating Another Lookup Relationship Field on the Task Object:

- Navigate to Task Object: Go to Setup, click on Object Manager, and search for Task.
- > Access Fields & Relationships: Click on Fields & Relationships, then click New.
- > Select Relationship Type: Choose Lookup Relationship and click Next.
- > Select Related Object: Choose Drop-Off Point and click Next.
- > Field Details:

⇒ Field Name: Drop-Off Point

Field Label: Auto-generated

Finish: Click Next, then Next, and finally Save.



Creation of Fields for the Venue Object:

>> Contact Email Field:

- Go to Setup > Object Manager > Venue.
- Click Fields & Relationships > New.
- Select Email > Next.
 - → Field Label: Contact Email
 - ⇒ Field Name: Contact_Email
 - Check Required.
- Click Next > Next > Save & New.

Contact Phone Field:

- Go to Setup > Object Manager > Venue.
- Click Fields & Relationships > New.
- Select Phone > Next.
 - ⇒ Field Label: Contact Phone
 - ⇒ Field Name: Contact_Phone
 - Check Required.
- Click Next > Next > Save & New.



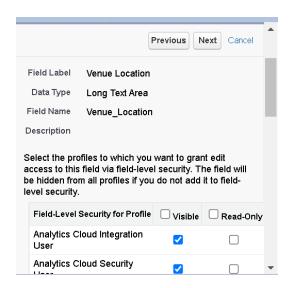
Location Field:

- Go to Setup > Object Manager > Venue.
- Click Fields & Relationships > New.
- Select Geologation > Next.
 - ⇒ Field Label: Location
 - → Decimal Places: 4
 - ⇒ Field Name: Location
 - Description: Enter the Geolocation of your Venue.
- Click Next > Next > Save & New.

>> . Venue Location Field:

- Go to Setup > Object Manager > Venue.
- Click Fields & Relationships > New.

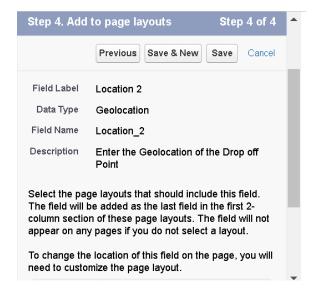
- Select Long Text Area > Next.
 - ⇒ Field Label: Venue Location
 - ♦ Field Name: Venue_Location.
- Click Next > Next > Save.



Creation of Fields for the Drop-Off Point Object:/

➤ Location 2 Field:

- ➤ Go to Setup > Object Manager > Drop-Off Point.
- Click Fields & Relationships > New.
- Select Geolocation > Next.
- > Field Details:
 - ⇒ Field Label: Location 2
 - ⇒ Field Name: (Auto-generated)
 - ⇒ Description: Enter the Geolocation of the Drop-Off Point
 - → Geolocation Options: Decimal
 - ⇒ Decimal Places: 4
- Click Next > Next > Save & New.



>> Distance Calculation Field:

- Go to Setup > Object Manager > Drop-Off Point.
- Click Fields & Relationships > New.
- Select Formula > Next.
- > Field Details:
 - ➡ Field Label: Distance Calculation
 - → Field Name: distance_calculation
 - → Formula Return Type: Number
 - Formula: DISTANCE(Location_2_c, Venue__r.Location__c, 'km')
- Click Next > Next > Save & New.

>> State Field:

- ➤ Go to Setup > Object Manager > Drop-Off Point.
- Click Fields & Relationships > New.
- Select Picklist > Next.
- > Field Details:
 - ⇒ Field Label: State
 - → Field Name: State
 - ⇒ Values: (Enter each value on 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 (UT)
- Check Required box.
- Click Next > Next > Save & New.



>> Distance Field on Task Object:

- Go to Setup > Object Manager > Task.
- Click Fields & Relationships > New.
- Select Number > Next.
- > Field Details:
 - Field Label: Distance
 - ⇒ Field Name: Distance
 - ♦ Length: 14
 - ⇒ Decimal Places: 4
- Check Required box.
- Click Next > Next > Save & New.

Creation of Fields for the Task Object:

>> Task ID Field:

- Go to Setup > Object Manager > Task.
- Click Fields & Relationships > New.
- Select Auto Number > Next.
- > Field Details:
 - ⇒ Field Label: Task ID
 - ⇒ Display Format: TASK-{0}
 - Starting Number: 1
 - Field Name: (Auto-generated)
 - Check Required.

Click Next > Next > Save & New.

➤ Date Field:

- Go to Setup > Object Manager > Task.
- Click Fields & Relationships > New.
- Select Date > Next.
- > Field Details:
 - ⇒ Field Label: Date
 - ⇒ Field Name: Date
 - Check Required.
- Click Next > Next > Save & New.



>> Food Category Field:

- Go to Setup > Object Manager > Task.
- Click Fields & Relationships > New.
- Select Picklist (Multi-Select) > Next.
- > Field Details:
 - ⇒ Field Label: Food Category
 - ⇒ Field Name: Food_Category
 - Values:
 - ✓ Veg
 - Non-Veg

 - Snack
 - Check Required.
- Click Next > Next > Save & New.

>> Number of People Served Field:

- Go to Setup > Object Manager > Task.
- Click Fields & Relationships > New.
- Select Number > Next.
- > Field Details:
 - → Field Label: Number of People Served
 - ⇒ Field Name: Number_of_People_Served
 - Check Required.
- Click Next > Next > Save & New.



>> Name of the Person Field:

- ➤ Go to Setup > Object Manager > Task.
- Click Fields & Relationships > New.
- Select Text > Next.
- > Field Details:
 - → Field Label: Name of the Person
 - ⇒ Field Name: Name_of_the_Person
- Click Next > Next > Save & New.

>> Phone Field:

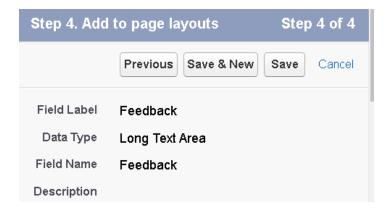
- Go to Setup > Object Manager > Task.
- Click Fields & Relationships > New.
- Select Phone > Next.
- > Field Details:
 - ⇒ Field Label: Phone
 - ⇒ Field Name: Phone
- Click Next > Next > Save & New.

Rating Field:

- Go to Setup > Object Manager > Task.
- Click Fields & Relationships > New.
- Select Picklist > Next.
- > Field Details:
 - ⇒ Field Label: Rating
 - ⇒ Field Name: Rating
 - → Values:
 - **~** 1
 - **№** 2
 - **№** 3
 - **₽** 4
 - **~** 5
- Click Next > Next > Save & New.

>> Feedback Field:

- ➤ Go to Setup > Object Manager > Task.
- ➤ Click Fields & Relationships > New.
- Select Long Text Area > Next.
- > Field Details:
 - ⇒ Field Label: Feedback
 - ⇒ Field Name: Feedback
- Click Next > Next > Save.



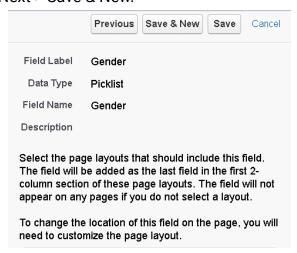
Creation of Fields for the Volunteer Object:

>> Volunteer ID Field:

- Go to Setup > Object Manager > Volunteer.
- > Click Fields & Relationships > New.
- Select Auto Number > Next.
 - ⇒ Field Label: Volunteer ID
 - Field Name: (Auto-generated)
 - Check Required.
- Click Next > Next > Save & New.

→ Gender Field:

- Go to Setup > Object Manager > Volunteer.
- Click Fields & Relationships > New.
- Select Picklist > Next.
 - Field Label: Gender
 - ⇒ Field Name: Gender
 - Values:
 - ♣ Female
- Click Next > Next > Save & New.



>> Available On Field:

- Go to Setup > Object Manager > Volunteer.
- Click Fields & Relationships > New.
- Select Date > Next.
 - ⇒ Field Label: Available On
 - ⇒ Field Name: Available On
 - Check Required.
- Click Next > Next > Save & New.

→ Age Field:

- Go to Setup > Object Manager > Volunteer.
- Click Fields & Relationships > New.
- Select Number > Next.
 - Field Label: Age
 - ♦ Field Name: Age
 - Check Required.
- Click Next > Next > Save & New.



▶ Email Field:

- Go to Setup > Object Manager > Volunteer.
- Click Fields & Relationships > New.
- Select Email > Next.
 - → Field Label: Email
 - ♦ Field Name: Email
 - Check Required.
- Click Next > Next > Save & New.

>> Contact Number Field:

- Go to Setup > Object Manager > Volunteer.
- Click Fields & Relationships > New.
- Select Number > Next.
 - ⇒ Field Label: Contact Number
 - ⇒ Field Name: Contact Number
 - Check Required.
- Click Next > Next > Save & New



>> Address Field:

- Go to Setup > Object Manager > Volunteer.
- Click Fields & Relationships > New.
- > Select Text Area (Long) > Next.
 - → Field Label: Address
 - ⇒ Field Name: Address
- Click Next > Next > Save & New.

>> Date of Birth Field:

- Go to Setup > Object Manager > Volunteer.
- Click Fields & Relationships > New.
- Select Date > Next.
 - ⇒ Field Label: Date of Birth
 - ♦ Field Name: Date_of_Birth
- Click Next > Next > Save.

Creation of Fields for the Execution Details Object:

- >> Execution ID Field:
 - Go to Setup > Object Manager > Execution Details.
 - Click Fields & Relationships > New.
 - Select Auto Number > Next.
 - > Field Details:
 - ⇒ Field Label: Execution ID
 - ⇒ Field Name: (Auto-generated)
 - Check Required.
 - Click Next > Next > Save & New.

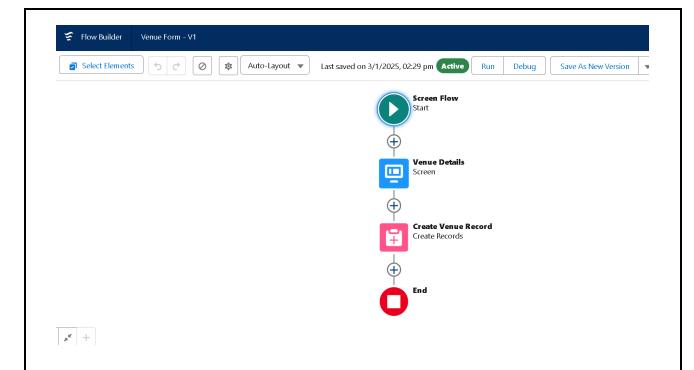


STEP-6 FLOWS

- Create Flow to Create a Record in Venue Object:
- Navigate to Flow: Go to Setup, type Flow in the Quick Find box, and click on Flows.
- Create New Flow: Click New Flow and select Screen Flow. Click Create.
- > Add Screen Element:
 - → Click the + icon between Start and End, then select Screen.
 - Label: Venue Details
 - → API Name: Venue_Details
- Add Components:
 - Text Component:
 - Label: Venue Name

- ♣ API Name: Venue_Name
- Email Component:
 - 🚜 Label: Email
 - ♣ API Name: Contact_Email
- Phone Component:

 - API Name: Contact_Phone
- Text Component:
 - Label: Venue Location
 - API Name: Venue_Location
- Number Component:
 - Label: Latitude
 - API Name: Latitude
- Number Component:
 - Label: Longitude
 - API Name: Longitude
- Click Done.
- Add Create Record Element:
 - Click the + icon between Venue Details and End, then select Create Record.
 - → 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:
 - ⇒ Field: Contact_Email__c = {!Contact_Email.value}
 - Field: Contact_Phone__c = {!Contact_Phone.value}
 - Field: Name = {!Venue_Name}
 - ⇒ Field: Venue_Location__c = {!Venue_Location}
 - ⇒ Field: Location__Latitude__s = {!Latitude}
 - ⇒ Field: Location_Longitude_s = {!Longitude}
- > Save Flow:
 - Flow Label: Venue Form
 - → Flow API Name: Venue_Form



STEP-7 Trigger

Create a Trigger in Salesforce:

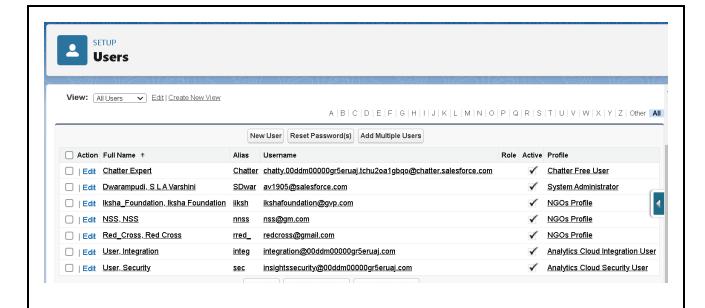
- > Log In: Log into your Trailhead account.
- Open Developer Console: Click on the gear icon in the top right corner and select Developer Console.
- Create New Trigger:
 - Click on the File menu in the toolbar.
 - → Select New > Trigger.
- > Enter Trigger Details:
 - Name: DropOffTrigger
 - ⇒ sObject: Drop-Off Point
- Click on Submit.

```
Developer Console - Google Chrome
gayatrividyaparishadcol-18f-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File + Edit + Debug + Test + Workspace + Help + < >
DropOffTrigger.apxt 🛎
  Code Coverage: None - API Version: 62 -
  1  trigger DropOffTrigger on Drop_Off_point__c (before insert) {
           for(Drop_Off_point__c Drop : Trigger.new){
  3 ▼
  4
               Drop.Distance_c = Drop.distance_calculation_c;
  5
  6
  7
          }
  8
  9 }
```

STEP-8 Profiles

Creation of Users:

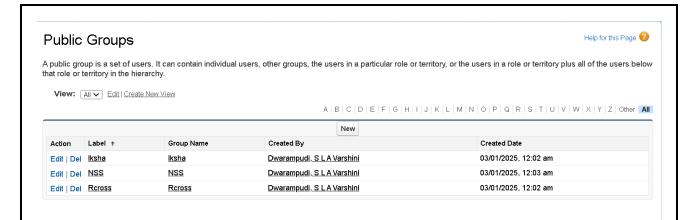
- Navigate to Users: Go to Setup, type Users in the Quick Find bar, and click on Users.
- Create New User: Click New User.
- General Information:
 - → First Name: Iksha Foundation
 - ♦ Last Name: Iksha_Foundation
 - Alias: iiksh
 - Email: (Your Email)
 - ♦ Username: ikshafoundation@sb.com
 - Nickname: (Auto Populated)
 - → User License: Salesforce Platform
 - Profile: NGOs Profile
 - Active: Check
- Click Save.
- ➤ Follow the same steps to create two additional users with different first and last names based on different NGOs, ensuring each has a unique username and alias.



STEP-9 Public Groups

Creation of Public Group:

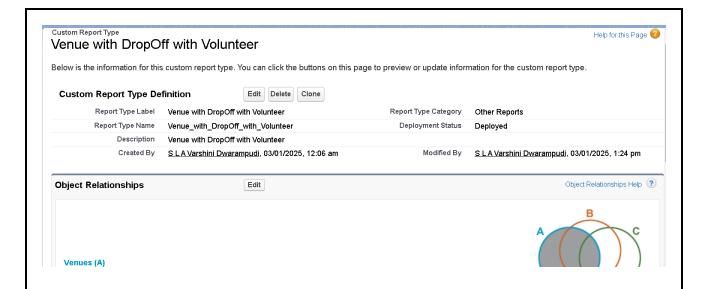
- Navigate to Public Groups: Go to Setup, type Public Groups in the Quick Find bar, and click on Public Groups.
- Create New Group: Click New.
- Group Information:
 - Label: Iksha
 - Group Name: Iksha
 - Grant Access Using Hierarchies: Check
- Select Members:
 - ♦ In the Search box, select Users.
 - ♦ In Selected Members, add Iksha Foundation and System Administrator.
- Click Save.
- Follow the same steps to create two additional public groups with different labels and group names based on different NGOs, ensuring each group includes the appropriate users and has the "Grant Access Using Hierarchies" option checked.



STEP- 10 Report Types

Creation of Custom Report Types:

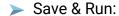
- Navigate to Report Types: Go to Setup, type Report Types in the Quick Find bar, and click on Report Types.
- Continue: Click on Continue.
- > Create New Custom Report Type: Click on New Custom Report Type.
- Define the Custom Report Type:
 - Primary Object: Select Venues
 - Report Type Label: Venue 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
- Click Next.
- Relate Another Object:
 - Near Click to relate another Object, select Drop-Off Points.
 - ♦ Choose "A" records may or may not have related "B" records.
- > Relate Another Object:
 - Near Click to relate another Object, select Volunteers.
- Click Save.



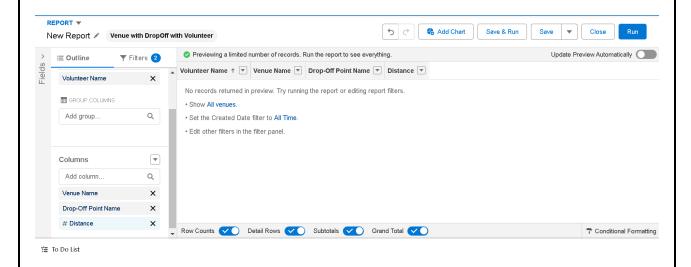
STEP- 11 Reports

Creation of Report on Venue with DropOff with Volunteer:

- Navigate to App: Go to the FoodConnect app.
- Access Reports Tab: Click on the Reports tab.
- Create New Folder:
 - Click on New Folder.
 - → Folder Label: Custom Reports
 - → Folder Unique Name: CustomReports
- Open Custom Reports: Click on the Custom Reports folder and then click on New Report.
- Select Report Type: Choose Venue with DropOff with Volunteer.
- > Start Report: Click on Start Report.
- Group Rows:
 - Add Volunteer Name.
- > Add Columns:
 - Add Venue Name.
 - Add Drop-Off Point Name.
 - Add Distance.



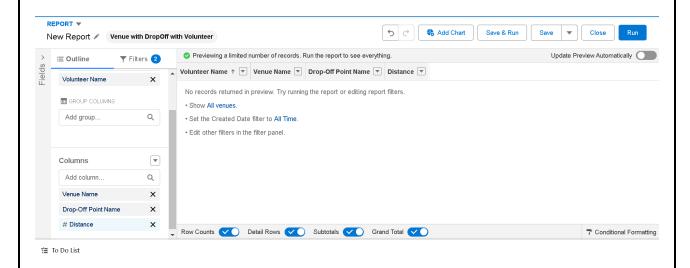
- Click on Save & Run.
- Report Name: Venue and Drop Off Point
- Report Unique Name: (Auto Populated)
- → Select Folder: Choose Custom Reports.
- Click on Save.



Creation of Report on Volunteers with Execution Details and Tasks:

- Navigate to App: Go to the FoodConnect app.
- > Access Reports Tab: Click on the Reports tab.
- Open Custom Reports Folder: Click on the Custom Reports folder and then click on New Report.
- > Select Report Type: Choose Volunteers with Execution Details and Tasks.
- > Start Report: Click on Start Report.
- Group Rows:
 - Add Volunteer ID.
- > Add Columns:
 - Add Volunteer Name (from Volunteers).
 - Add Task Name (from Tasks).
 - Add Execution Detail Name (from Execution Details).
 - Add Owner Name (from Volunteers).

- → Add Date (from Tasks).
- → Add Rating (from Tasks).
- > Save & Run:
 - Click on Save & Run.
 - → Report Name: Volunteer Task
 - Report Unique Name: (Auto Populated)
 - Select Folder: Choose Custom Reports.
 - Click on Save.



STEP- 12 Dashboards

- * Adding Venue and Drop-Off Point Report to the Dashboard:
 - Navigate to App: Go to the FoodConnect app.
 - > Access Dashboards Tab: Click on the Dashboards tab.
 - Create New Folder:
 - Click on New Folder.
 - → Folder Label: Custom Dashboards
 - → Folder Unique Name: (Auto Populated)
 - Open Custom Dashboards: Click on the Custom Dashboards folder and then click on

New Dashboard.

- Name the Dashboard:
 - Name: Organization Details.
- Add Widget:

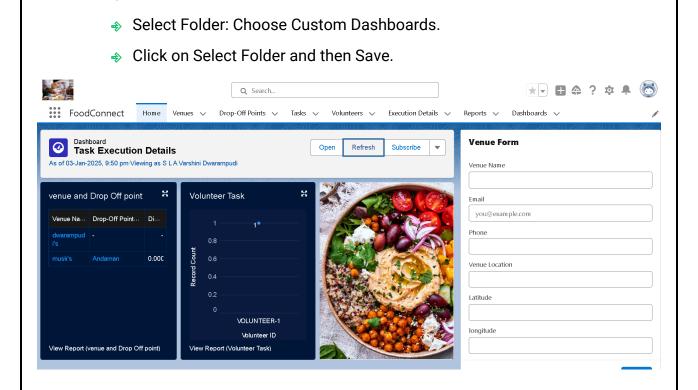
- Click on Widget and select Chart or Table.
- Select Report: Choose Venue and Drop Off Point Report.
- Click on Select.
- > Add Component:
 - Display As: Select Lightning Table.
 - Component Theme: Select Dark (Optional).
- Save Dashboard: Click on Save.

Adding Volunteer Task Report to the Dashboard:

- > Access Dashboard: Open the dashboard where you want to add the report.
- > Add Widget:
 - → Click on Widget and select Chart or Table.
- > Select Report:
 - In Select Report, choose Volunteer Task Report.
 - Click on Select.
- Add Component:
 - Display As: Select Line Chart.
 - Component Theme: Select Dark (Optional).
- > Save Dashboard: Click on Save.

Adding a Picture to the Dashboard (Optional):

- Prepare Image: Download an image from Google or another source to your system.
- Access Dashboard: Open the dashboard where you want to add the image.
- Add Widget:
 - Click on Widget and select Image.
- Upload Image:
 - Click on Browse Files.
 - Select the picture you want to upload to the dashboard.
- Save Image:



STEP-13 Sharing Rules

Creation of Sharing Rules:

→ Rule 1: Distance Less Than 15:

Name: Task Execution Details.

- Navigate to Sharing Settings: Go to Setup, type Sharing Settings in the Quick Find box, and click on Sharing Settings.
- Find Drop-Off Point Sharing Rules: Scroll down to find Drop-Off Point Sharing Rules.
- Create New Rule:
 - Click on New near Drop-Off Point Sharing Rules.
 - Label: Rule 1
 - Rule Name: Rule_1
 - Select Rule Type: Based on criteria.

- Select Records to Share:
 - Field: Distance
 - Operator: less than
 - ♦ Value: 15
- Select Users to Share With:
 - Public Groups: Iksha
- Click Save.
- » Rule 2: Distance Greater Than 15 and Less Than or Equal to 30:
 - Create New Rule:
 - Click on New near Drop-Off Point Sharing Rules.
 - Label: Rule 2
 - Rule Name: Rule_2
 - Select Rule Type: Based on criteria.
 - > Select Records to Share:
 - → Field: Distance
 - Operator: greater than
 - → Value: 15
 - → Field: Distance
 - Operator: less or equal
 - ♦ Value: 30
 - Select Users to Share With:
 - Public Groups: NSS
 - Click Save.
- » Rule 3: Distance Greater Than 30 and Less Than or Equal to 50:
 - Create New Rule:
 - Click on New near Drop-Off Point Sharing Rules.
 - Label: Rule 3

Nule Name: Rule_3

Select Rule Type: Based on criteria.

Select Records to Share:

→ Field: Distance

Operator: greater than

Value: 30

Field: Distance

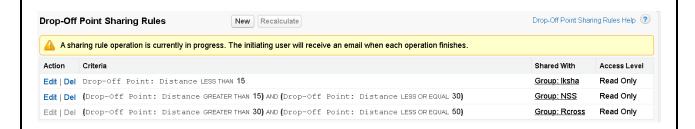
Operator: less or equal

→ Value: 50

Select Users to Share With:

Public Groups: Street Cause

Click Save.



STEP- 14 Home Page

Creation of Home Page:

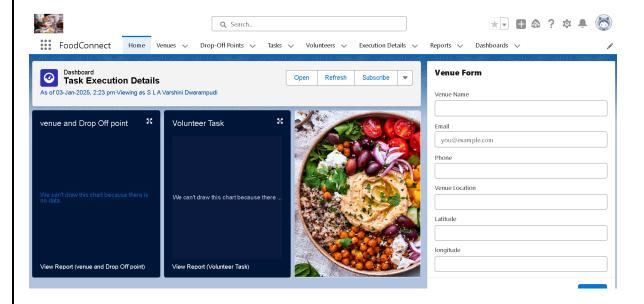
- Navigate to Setup: Go to Setup, type Lightning App Builder in the Quick Find box, and click on Lightning App Builder.
- Create New Home Page:
 - Click on New.
 - Select Home Page and give it a Label: HOME Page.
 - Select Standard Home Page.

Add Components:

- In the Components section, search for Flow and drag it to the right side section.
- On the right side, set the Flow to: Venue Flow.
- ◆ Search for Dashboard in the Components section, then drag and drop it into the first section.

Save and Activate:

- Click on Save and then Activation.
- Click on App Default and then Add Assignments.
- Add FoodConnect App and then click on 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 available resources. This approach not only enhanced
operational efficiency but also fostered community engagement, ultimately
contributing to a more sustainable and impactful solution to food waste and
hunger.

