Salesforce Project:

Project Notes: To Supply Leftover Food to the Poor

1. What is an Object? How a Custom Object is Created

Object:

- An object in Salesforce is a database table that allows you to store information specific to your organization. Objects can be standard (provided by Salesforce) or custom (created by users).

Creating a Custom Object:

1. **Navigate to Setup:** Go to the Salesforce Setup menu.
2. **Create a Custom Object:** In the Quick Find box, type "Objects" and select "Object Manager".
3. **New Custom Object:** Click on "Create" and then "Custom Object".
4. **Define Object Properties:**
    - **Label:** Enter a name for your object (e.g., "Food Donation").
    - **Plural Label:** Enter the plural form of the object name (e.g., "Food

Donations").
    - **Object Name:** This will auto-fill based on the label.
    - **Description:** Enter a description of the object's purpose.
5. **Optional Features:** Select options like "Allow Reports", "Track Activities", "Allow in Chatter Groups", etc.
6. **Save:** Click the "Save" button to create the custom object.

2. What is a Tab? How a Custom Tab is Created

Tab:

- A tab in Salesforce is a user interface component that allows users to create, view, and edit records for an object. Tabs are associated with standard and custom objects and can be customized to enhance the user experience.

Creating a Custom Tab:

1. **Navigate to Setup:** Go to the Salesforce Setup menu.
2. **Create a Custom Tab:** In the Quick Find box, type "Tabs" and select "Tabs".
3. **New Custom Object Tab:** Click on "New" next to "Custom Object Tabs".
4. **Select Object:** Choose the custom object for which you want to create a tab.
5. **Tab Style:** Choose a tab style or click "Create your own style" to customize.
6. **Next Steps:** Configure tab visibility settings and add the tab to custom apps as needed.
7. **Save:** Click "Save" to create the custom tab.

3. Create a Lightning App

Creating a Lightning App:

1. **Navigate to Setup:** Go to the Salesforce Setup menu.
2. **App Manager:** In the Quick Find box, type "App Manager" and select it.
3. **New Lightning App:** Click "New Lightning App".
4. **App Details & Branding:**
    - **App Name:** Enter the name of the app (e.g., "Food Donation Management").
    - **Developer Name:** This will auto-fill based on the app name.
    - **Description:** Provide a brief description of the app.

        - **Branding:** Customize the app’s branding (e.g., logo and primary color).
5. **App Options:** Choose app options like "Navigation Type" and "Utility Bar".
6. **Navigation Items:** Select and order the items (tabs) to include in the app.
7. **User Profiles:** Assign the app to user profiles.
8. **Review and Finish:** Review your app configuration and click "Save & Finish".

4. What are Fields?

Fields:

- Fields are data columns within an object, similar to columns in a database table. They hold specific pieces of information related to the records of the object.

a. Creation of Relationship Fields in Objects

1. **Navigate to Object Manager:** Go to Object Manager and select the object you want to create a relationship field for.
2. **Fields & Relationships:** Click "Fields & Relationships" and then "New".
3. **Select Field Type:**
    - **Lookup Relationship:** Links two objects, creating a parent-child relationship.
    - **Master-Detail Relationship:** Creates a tight link between two objects, where the child record is deleted if the parent is deleted.
4. **Field Details:** Enter the necessary details for the relationship field.
5. **Next Steps:** Configure field-level security and add to page layouts.
6. **Save:** Click "Save" to create the relationship field.

b. Creation of Fields for the Venue Object

1. **Navigate to Venue Object:** In the Object Manager, select the "Venue" object.
2. **Fields & Relationships:** Click "Fields & Relationships" and then "New".
3. **Field Type:** Select the field type (e.g., Text, Number, Date).
4. **Field Details:** Enter the field label, length, description, etc.
5. **Next Steps:** Configure field-level security and add to page layouts.
6. **Save:** Click "Save" to create the field.

c. Creation of Fields for the Drop-Off Point Object

1. **Navigate to Drop-Off Point Object:** In the Object Manager, select the "Drop-Off

Point" object.
2. **Fields & Relationships:** Click "Fields & Relationships" and then "New".
3. **Field Type:** Select the field type.
4. **Field Details:** Enter the field label, length, description, etc.
5. **Next Steps:** Configure field-level security and add to page layouts.
6. **Save:** Click "Save" to create the field.

d. Creation of Fields for the Task Object

1. **Navigate to Task Object:** In the Object Manager, select the "Task" object.
2. **Fields & Relationships:** Click "Fields & Relationships" and then "New".
3. **Field Type:** Select the field type.
4. **Field Details:** Enter the field label, length, description, etc.
5. **Next Steps:** Configure field-level security and add to page layouts.
6. **Save:** Click "Save" to create the field.

e. Creation of Fields for the Volunteer Object

1. **Navigate to Volunteer Object:** In the Object Manager, select the "Volunteer" object.
2. **Fields & Relationships:** Click "Fields & Relationships" and then "New".
3. **Field Type:** Select the field type.
4. **Field Details:** Enter the field label, length, description, etc.
5. **Next Steps:** Configure field-level security and add to page layouts.
6. **Save:** Click "Save" to create the field.

f. Creation of Fields for the Execution Details Object

1. **Navigate to Execution Details Object:** In the Object Manager, select the "Execution Details" object.
2. **Fields & Relationships:** Click "Fields & Relationships" and then "New".
3. **Field Type:** Select the field type.
4. **Field Details:** Enter the field label, length, description, etc.
5. **Next Steps:** Configure field-level security and add to page layouts.
6. **Save:** Click "Save" to create the field.

5. What are Flows? Create Flow to Create a Record in Venue Object

Flows:

- Flows in Salesforce are automation tools that can collect data and perform actions in Salesforce. Flows can be used to automate complex business processes by using a point-and-click interface.

Creating a Flow to Create a Record in Venue Object:

1. **Navigate to Setup:** Go to the Salesforce Setup menu.
2. **Flow Builder:** In the Quick Find box, type "Flows" and select "Flows".
3. **New Flow:** Click "New Flow".
4. **Select Flow Type:** Choose "Screen Flow" or "Auto launched Flow" depending on your requirement.
5. **Add Elements:**
    - **Add a Screen (optional):** If using a Screen Flow, drag a Screen element to gather user input.
    - **Create Records:** Drag the "Create Records" element to the canvas.
6. **Configure Create Records:**
    - **Label:** Enter a name for the element (e.g., "Create Venue Record").
    - **Object:** Select the "Venue" object.
    - **Field Values:** Map the flow variables or user input to the fields in the Venue object.
7. **Connect Elements:** Connect the Start element to the Create Records element.
8. **Save and Activate:** Save the flow and click "Activate".

6. What is a Trigger? Create a Trigger, Trigger Code

Trigger:

- A trigger is an Apex script that executes before or after specified database events, such as insert, update, or delete.

Creating a Trigger:

1. **Navigate to Setup:** Go to the Salesforce Setup menu.
2. **Apex Triggers:** In the Quick Find box, type "Apex Triggers" and select it.
3. **New Trigger:** Click "New" to create a new trigger.
4. **Trigger Code:**

```
apexCopy code
trigger DropOffTrigger on Drop_Off_point__c (before insert) {
```

```
    for(Drop_Off_point__c Drop : Trigger.new){
        Drop.Distance__c = Drop.distance_calculation__c;
    }
}
```

1. **Save:** Click "Save" to create the trigger.

7. What are Profiles and Creation of Users

Profiles:

- Profiles in Salesforce define a user's permissions to perform different functions within Salesforce. Profiles control access to objects, fields, and various functionalities.

Creating Users:

1. **Navigate to Setup:** Go to the Salesforce Setup menu.
2. **Users:** In the Quick Find box, type "Users" and select "Users".
3. **New User:** Click "New User".
4. **User Information:**
    - **First Name, Last Name, Email, etc.:** Enter the user’s details.
    - **Username:** Enter a unique username (e.g., email address).
    - **Profile:** Select the appropriate profile for the user.
    - **Role:** Assign a role to the user.
5. **Save:** Click "Save" to create the user.

8. What are Public Groups and Creation of Public Groups

Public Groups:

- Public Groups are collections of users that can be used to simplify the sharing of records, access permissions, and reporting within Salesforce.

Creating Public Groups:

1. **Navigate to Setup:** Go to the Salesforce Setup menu.
2. **Public Groups:** In the Quick Find box, type "Public Groups" and select "Public Groups".

3. **New Group:** Click "New" to create a new public group.
4. **Group Information:**
   - **Label:** Enter a name for the group.
   - **Group Members:** Add users, roles, or other groups to the group.
5. **Save:** Click "Save" to create the public group.

9. What are Report Types and Creation of Report Type

Report Types:

- Report Types in Salesforce define the objects and fields that are available for use in reports. Custom report types can be created to combine data from different objects.

Creating a Custom Report Type:

1. **Navigate to Setup:** Go to the Salesforce Setup menu.
2. **Report Types:** In the Quick Find box, type "Report Types" and select "Report Types".
3. **New Custom Report Type:** Click "New Custom Report Type".
4. **Define Report Type:**
   - **Primary Object:** Select the primary object (e.g., Venue).
   - **Report Type Label:** Enter a name for the report type.
   - **Description:** Provide a description of the report type.
   - **Store in Category:** Select the category for the report type.
5. **Define Relationships:** Define the relationships between objects to include related data.
6. **Save:** Click "Save" to create the custom report type.

10. Report Creation

a. Creation of Report on Venue with Drop-Off and Volunteer

1. **Navigate to Reports:** Go to the Reports tab.
2. **New Report:** Click "New Report".
3. **Select Report Type:** Choose the custom report type that includes Venue, Drop-Off, and Volunteer.
4. **Configure Report:**
   - **Add Fields:** Drag and drop the desired fields into the report.

        - **Filters:** Apply filters to refine the data.
        - **Grouping:** Group data as needed (e.g., by Venue).
5. **Save:** Save the report with a relevant name.

b. Creation of Report on Volunteers with Execution Details and Tasks

1. **Navigate to Reports:** Go to the Reports tab.
2. **New Report:** Click "New Report".
3. **Select Report Type:** Choose the custom report type that includes Volunteers, Execution Details, and Tasks.
4. **Configure Report:**
    - **Add Fields:** Drag and drop the desired fields into the report.
    - **Filters:** Apply filters to refine the data.
    - **Grouping:** Group data as needed (e.g., by Volunteer).
5. **Save:** Save the report with a relevant name.

11. What are Dashboards?

Dashboards:

- Dashboards in Salesforce are visual representations of reports, allowing users to monitor key metrics and performance indicators at a glance.

Adding Reports to the Dashboard:

1. **Navigate to Dashboards:** Go to the Dashboards tab.
2. **New Dashboard:** Click "New Dashboard".
3. **Dashboard Information:** Enter the name, description, and folder for the dashboard.
4. **Add Components:**
    - **Add Report:** Drag and drop report components into the dashboard.
    - **Select Report:** Choose the report to be displayed in the component.
    - **Configure Display:** Configure the display settings for each component (e.g., chart type, filters).
5. **Save:** Save the dashboard.

Adding a Picture to the Dashboard (Optional):

1. **Upload Image:** Upload the image to the Salesforce Files.

2. **Add Image Component:** In the dashboard, add an image component and select the uploaded image.
3. **Configure Display:** Adjust the size and placement of the image within the dashboard.
4. **Save:** Save the dashboard with the added image.

12. What are Sharing Rules? Creation of Sharing Rules

Sharing Rules:

- Sharing Rules in Salesforce are used to extend the sharing access granted to users. They allow you to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Creating Sharing Rules:

1. **Navigate to Setup:** Go to the Salesforce Setup menu.
2. **Sharing Settings:** In the Quick Find box, type "Sharing Settings" and select "Sharing Settings".
3. **Select Object:** Choose the object for which you want to create a sharing rule.
4. **New Sharing Rule:** Click "New" next to the object's sharing rules section.
5. **Rule Information:**
    - **Label:** Enter a name for the sharing rule.
    - **Rule Type:** Select the type of rule (e.g., based on record owner or criteria).
    - **Share With:** Define the users or groups with whom to share the records.
6. **Save:** Click "Save" to create the sharing rule.

13. Home Page and Creation of Home Page

Home Page:

- The Home Page in Salesforce is a customizable page that provides users with an overview of their tasks, calendar events, and other important information.

Creating a Custom Home Page:

1. **Navigate to Setup:** Go to the Salesforce Setup menu.
2. **App Builder:** In the Quick Find box, type "App Builder" and select "Lightning App Builder".

3. **New Home Page:** Click "New" and select "Home Page".
4. **Home Page Template:** Choose a template for the home page.
5. **Page Components:**
   - **Drag Components:** Drag components (e.g., Recent Items, Reports) onto the page layout.
   - **Customize:** Customize the components to fit the needs of the users.
6. **Assign Home Page:** Assign the home page to the appropriate profiles or apps.
7. **Save and Activate:** Save and activate the home page.