FOOD COONECT : TO SUPPLY LEFTOVER FOOD TO POOR
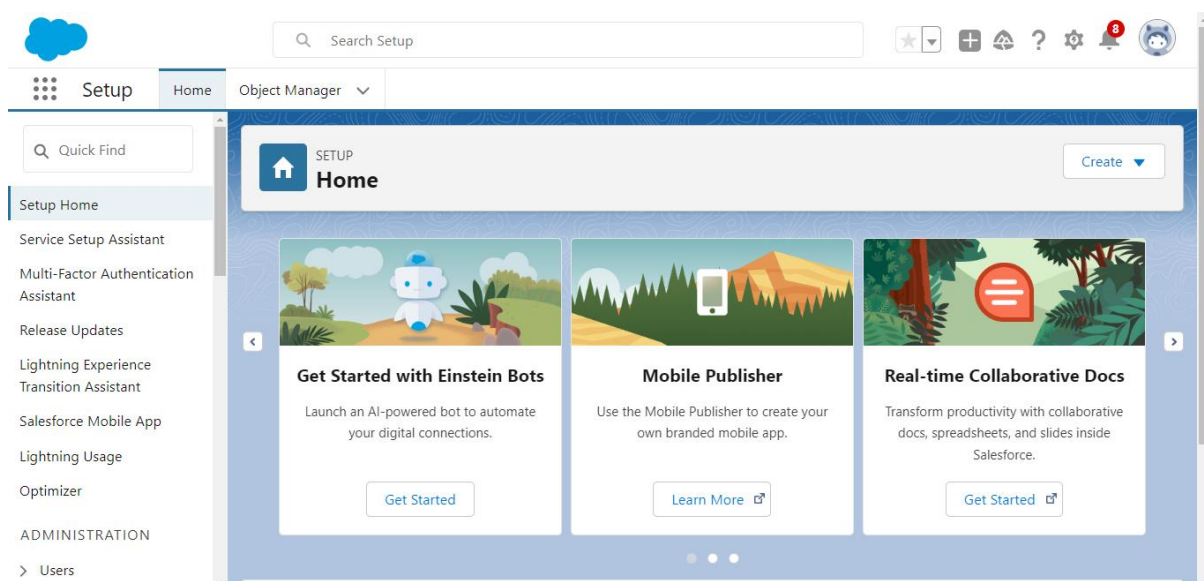

Creating Developer Account

Creating a developer org in salesforce.

1. **Go to https://developer.salesforce.com/signup**

1. **Click on Verify Account**

2. **Give a password and answer a security question and click on change password.**

3. **Give a password and answer a security question and click on change password.**

4. **Then you will redirect to your salesforce setup page.**

Create Venue Object

To create an object:

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

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**

2. **Click on Allow reports and Track Field History,Allow Activities.**

3. **Allow search >> Save.**

Create Drop-Off Point Object

To create an object:

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

1. **Enter the label name >> Drop-Off Point**

2. **Plural label name>> Drop-Off Points**

3. **Enter Record Name Label and Format**

- **Record Name >> Drop-Off point Name**

- **Data Type >> Text**

2. **Click on Allow reports and Track Field History,Allow Activities**

3. **Allow search >> Save.**

Create Task Object

To create an object:

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

1. **Enter the label name>> Task**

2. **Plural label name>> Tasks**

3. **Enter Record Name Label and Format**

- **Record Name >> Task Name**

- **Data Type >> Text**

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

3.   Allow search >> Save.

Create Volunteer Object

To create an object:

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

1. **Enter the label name>> Volunteer**

2. **Plural label name>> Volunteers**

3. **Enter Record Name Label and Format**

*   **Record Name >> Volunteer Name**

*   **Data Type >> Text**

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

3.   Allow search >> Save.

Create Execution Details Object

To create an object:

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

1. **Enter the label name >> Execution Detail**

2. **Plural label name >> Execution Details**

3. **Enter Record Name Label and Format**

*   **Record Name >> Execution Detail Name**

*   **Data Type >> Text**

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

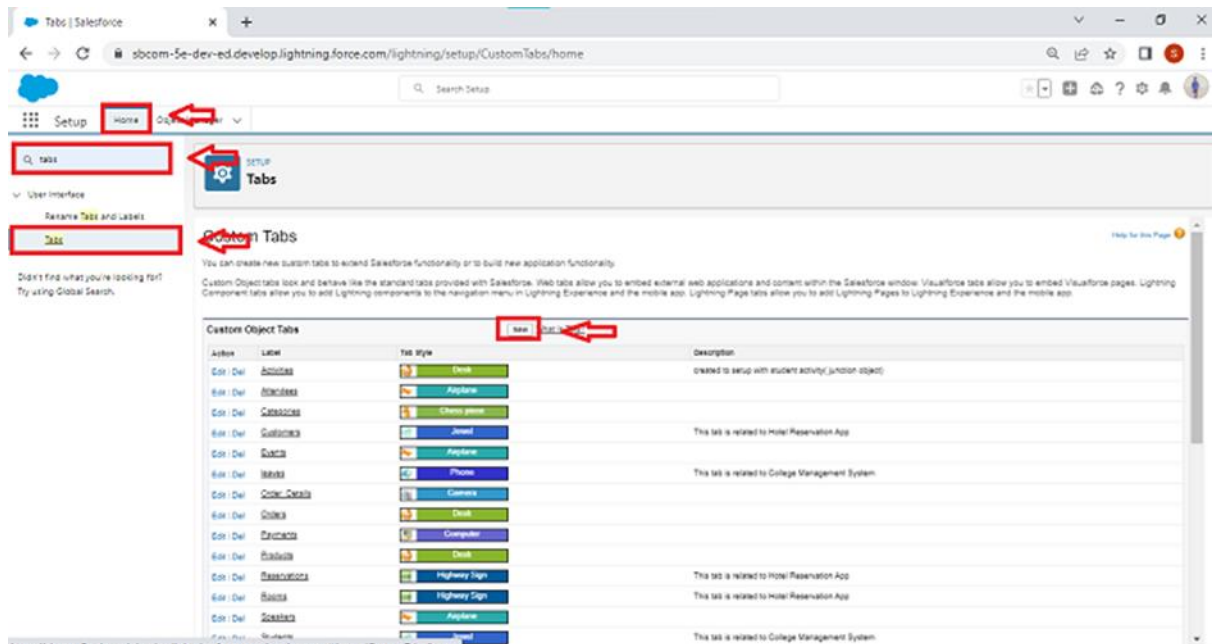**3.   Allow search >> Save.**

4.   Tabs

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

Creating a Custom Tab

To create a Tab:(Venue)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
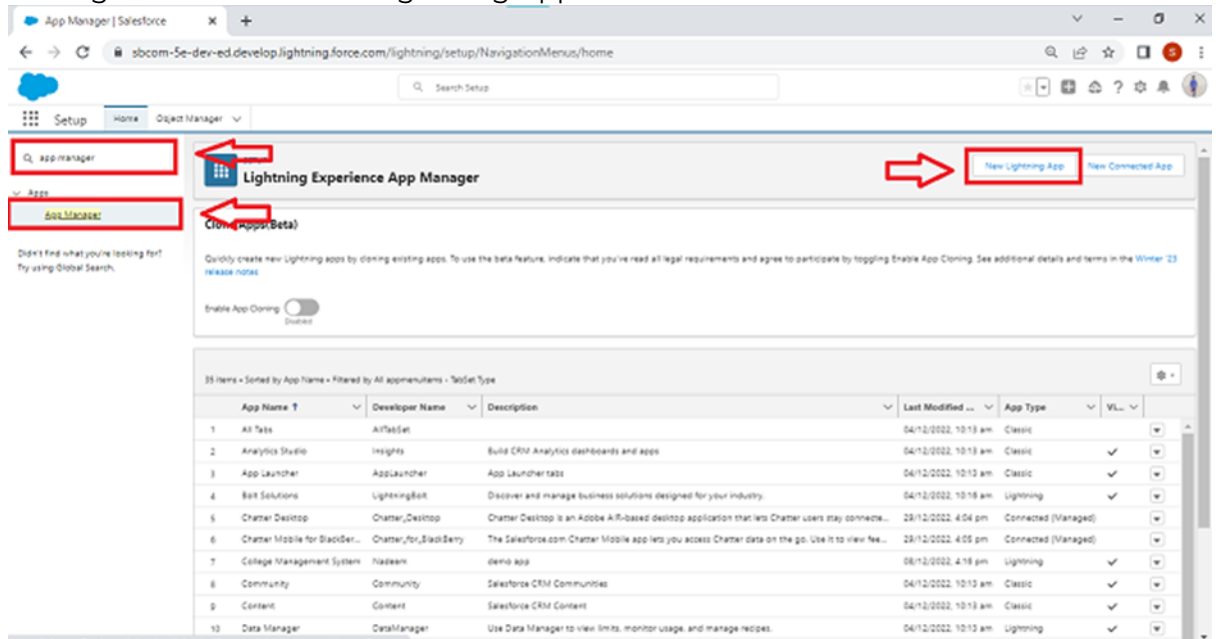
1. Select Object(Venue) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
2. Make sure that the Append tab to users' existing personal customizations is checked.
3. Click save
Create a Lightning App
To create a lightning app page:
1. Go to setup page >> search "app manager" in quick find >> select "app manager" >> click on New lightning App.

2. Fill the app name in app details and branding as follow
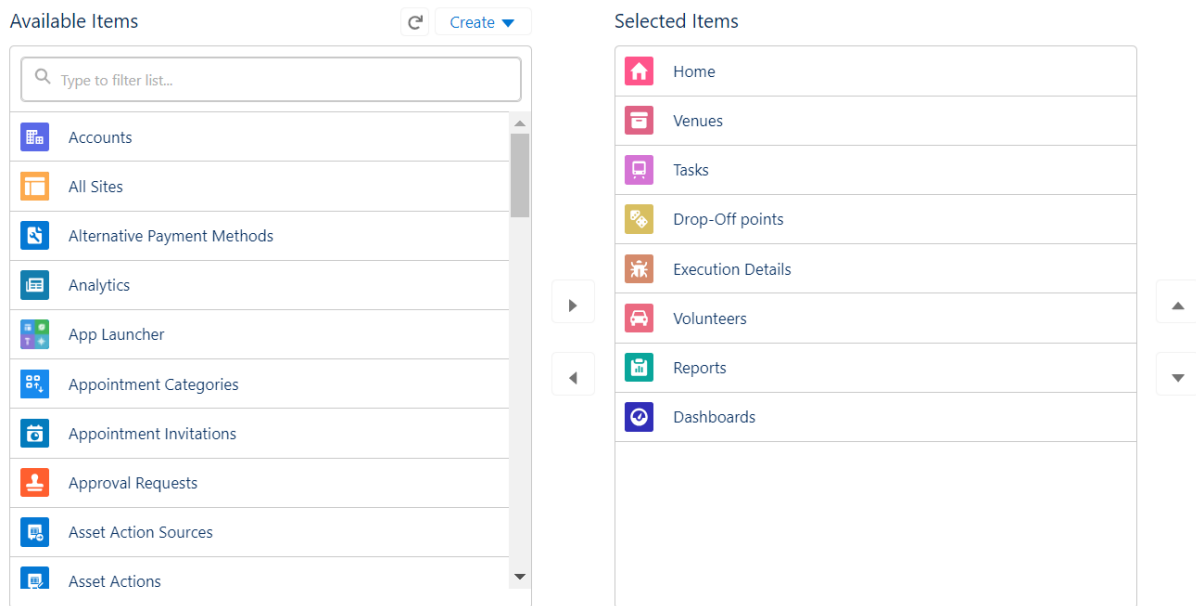App Name : FoodConnect
Developer Name : This will auto populated

Image : optional (if you want to give any image you can otherwise not mandatory) Primary color hex value : keep this default.

3.Then click Next >> (App option page)Set Navigation Style as Standard Navigation >> Next.
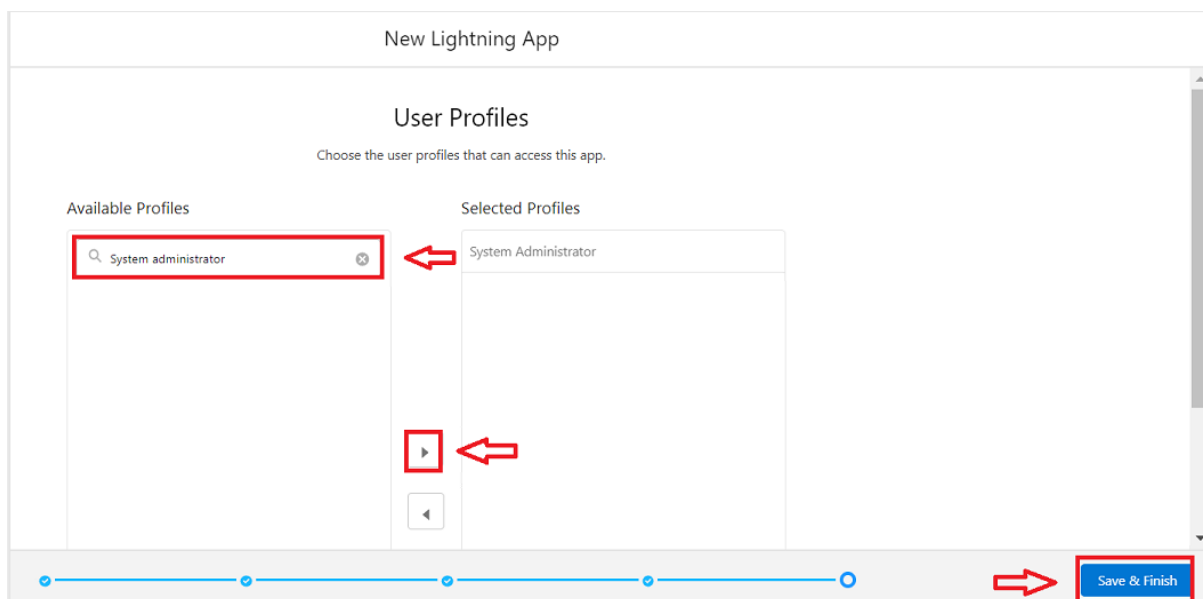
4. (Utility Items) keep it as default >> Next.
5. To Add Navigation Items:

Search for the item in the (Home, Venue, Drop-Off Point, Task, Volunteer, Execution Details, Reports) from the search bar and move it using the arrow button >> Next >> Next.
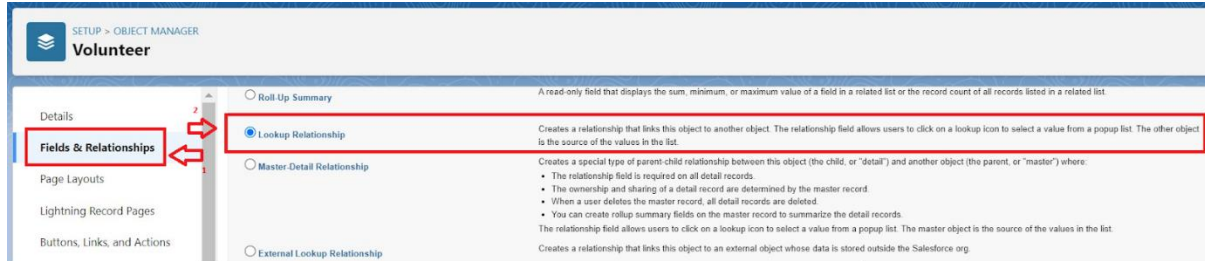
6. To Add User Profiles:

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(Task) in the search bar >> click on the object.

23. Now click on "Fields & Relationships" >> New

24. Select Lookup relationship

25. Select the related object "Drop-Off Point" 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

42.   Next >> Next >> Save.

Creation of fields for the Venue object

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

2. Now click on "Fields & Relationships" >> New

3. Select Data type as a "Email" and Click on Next

4. Fill the Above as following:

- Field Label : Contact Email

- Field Name : Contact Email

- Click on required check box

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

To create another fields in an object:

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

6.   Now click on "Fields & Relationships" >> New

7.   Select Data type as a "Phone" and Click on Next

8.   Fill the Above as following:

- Field Label : Contact Phone

- Field Name : Contact Phone

- Click on required check box

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

To create another fields in an object:

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

2. Now click on "Fields & Relationships" >> New

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

4. Fill the Above as following:

- Field Label : Location

- Decimal Places : 4

- Field Name : Location

- Description : Enter the Geolocation of your Venue

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

To create another fields in an object:

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

10.   Now click on "Fields & Relationships" >> New

11.   Select Data type as a "Long Text Area" and Click on Next

12.   Fill the Above as following:

- Field Label : Venue Location

- Field Name : Venue_Location

- 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.

2. Now click on "Fields & Relationships" >> New

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

4. Fill the Above as following:

- Field Label : Location 2

- Field Name : gets auto generated

- Description : Enter the Geolocation of the Drop off Point

- Geolocation Options : select Decimal

- Decimal Places : 4

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

To create another fields in an object:

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

2. Now click on "Fields & Relationships" >> New

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

4. Fill the Above as following:

- Field Label : distance calculation

- Field Name : distance_calculation

- Formula Return Type : Number

- Formula Options : DISTANCE(Location_2__c , Venue__r.Location__c , 'km')

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

To create another fields in an object:

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

6.   Now click on "Fields & Relationships" >> New

7.   Select Data type as a "Picklist" and Click on Next

8.   Fill the Above as following:

- Field Label : State
- Field Name : State
- 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 (UT)

- Click on required check box
- Click on Next >> Next >> Save and new.

To create another fields in an object:

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

10.   Now click on "Fields & Relationships" >> New

11.   Select Data type as a "Number" and Click on Next

12.   Fill the Above as following:

- Field Label : Distance

- Field Name : Distance

- Length : 14

- Decimal Places : 4

- Click on required check box

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

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.

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:

- Field Label : Task ID

- Display Format : TASK-{0}

- Starting Number : 1

- Field Name : gets auto generated

- Click on required check box

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

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Task) 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

- Field Name : Date

- Click on required check box

- 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(Task) in search bar >> click on the object.

6.   Now click on "Fields & Relationships" >> New

7.   Select Data type as a "Picklist (Multi-Select)" and Click on Next

8.   Fill the Above as following:

- Field Label : Food Category

- Field Name : Food Category

- Enter values, with each value separated by a new line :

Veg

Non-Veg

Salad

Snack

- Click on required check box

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

To create another fields in an object:

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

10.   Now click on "Fields & Relationships" >> New

11.   Select Data type as a "Number" and Click on Next

12.   Fill the Above as following:

- Field Label : Number of People Served

- Field Name : Number_of_People_Served

- Click on required check box

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

To create another fields in an object:

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

14.   Now click on "Fields & Relationships" >> New

15.   Select Data type as a "Text" and Click on Next

16.   Fill the Above as following:

- Field Label : Name of the Person

- Field Name : Name_of_the_Person

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

To create another fields in an object:

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

18.   Now click on "Fields & Relationships" >> New

19.   Select Data type as a "Phone" and Click on Next

20.   Fill the Above as following:

- Field Label : Phone

- Field Name : Phone

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

To create another fields in an object:

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

22.   Now click on "Fields & Relationships" >> New

23.   Select Data type as a "Pick List" and Click on Next

24.   Fill the Above as following:

- Field Label : Rating

- Field Name : Rating

- Enter values, with each value separated by a new line :

1

2

3

4

5

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

To create another fields in an object:

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

26.   Now click on "Fields & Relationships" >> New

27.   Select Data type as a "Long Text Area" and Click on Next

28.   Fill the Above as following:

- Field Label : Feedback

- Field Name : Feedback

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

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

1. 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)

1. Now click on save.

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

Component Theme : Select Dark (Optional)

1. Now click on save.

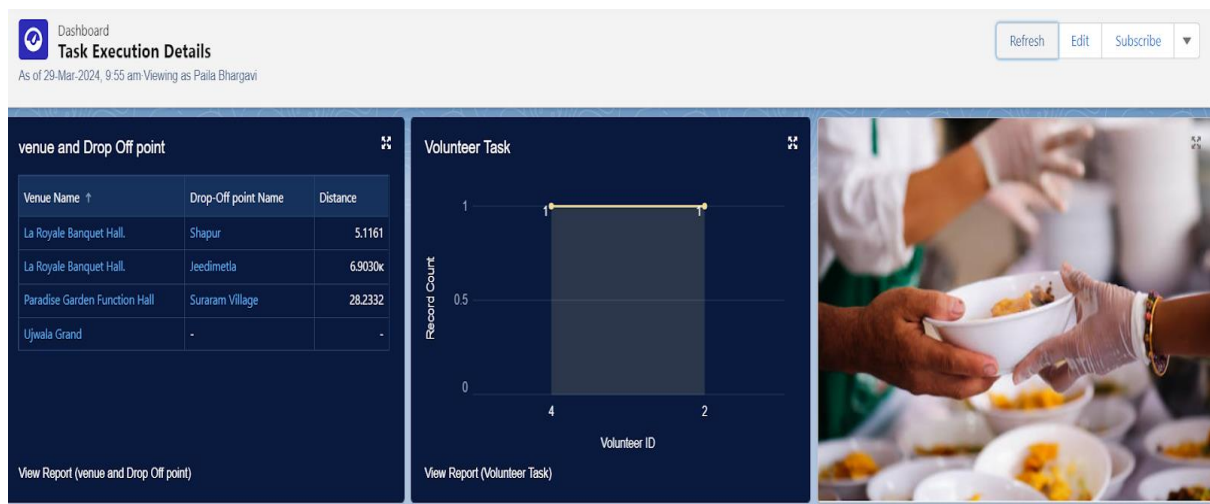**Adding a Picture to the Dashboard (Optional)**

(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

17.   Click on Save.

Action	Criteria	Shared With	Access Level
Edit | Del	Drop-Off point: Distance LESS OR EQUAL 15	Group: Iksha	Read/Write
Edit | Del	(Drop-Off point: Distance GREATER THAN 15) AND (Drop-Off point: Distance LESS OR EQUAL 30)	Group: NSS	Read/Write
Edit | Del	(Drop-Off point: Distance GREATER THAN 30) AND (Drop-Off point: Distance LESS OR EQUAL 50)	Group: Street Cause	Read/Write

Creation of Home Page

1. Go to setup >> type Lightning App Builder in quick find box >> Click on the Lightning App Builder and Select the New.

2. Select Home Page and give Label as HOME Page.

3. Select Standard Home Page.

4. Near Components search for Flow and Drag and Drop in Right Side Section..

5. On the right hand side:

Flow : Venue Flow

6. Near Components search for Dashboard, then Drag and Drop it in first Section.

7. Click on Save and Activation, then click on App Default, then Add Assignments.

8. Add FoodConnect App and then Save.

9. FoodConnect Home Page would Look Like this.