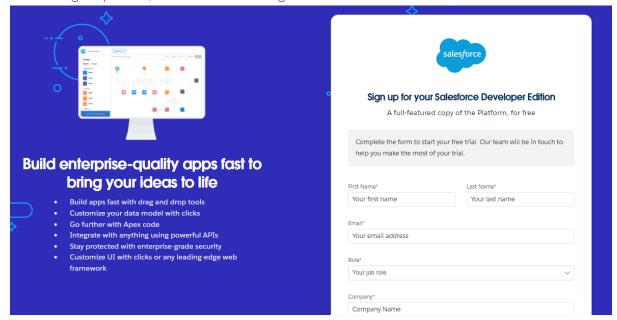
Creating Developer Account

Creating a developer org in salesforce.

- 1. Go to https://developer.salesforce.com/signup
- 2. On the sign up form, enter the following details:



- 1. First name & Last name
- 2. Fmail
- 3. Role: Developer
- 4. Company: College or Company Name
- 5. County: India
- 6. Postal Code: pin code
- 7. Username: should be a combination of your name and company

This need not be an actual email id, you can give anything in the format:

username@organization.com

Click on sign me up after filling these.

- 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:

- 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:

- 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

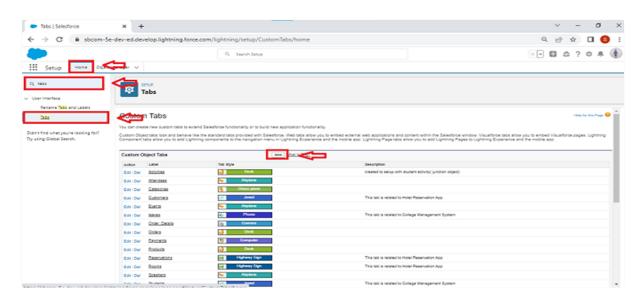
To create an object:

- 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.

Creating a Custom Tab

To create a Tab:(Venue)

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

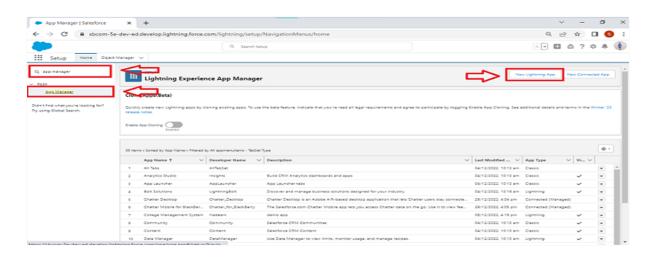


- Select Object(Venue) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab.
- 2. Make sure that the Append tab to users' existing personal customizations is checked.
- 3. Click save

Create a Lightning App

To create a lightning app page:

Go to setup page >> search "app manager" in quick find >> select "app manager"
 >> click on New lightning App.



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

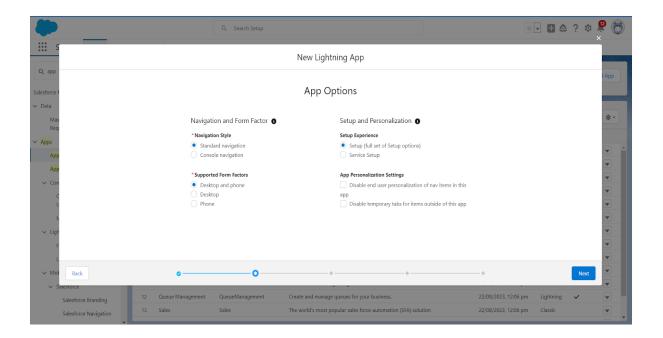
App Name: FoodConnect

Developer Name: This will auto populated

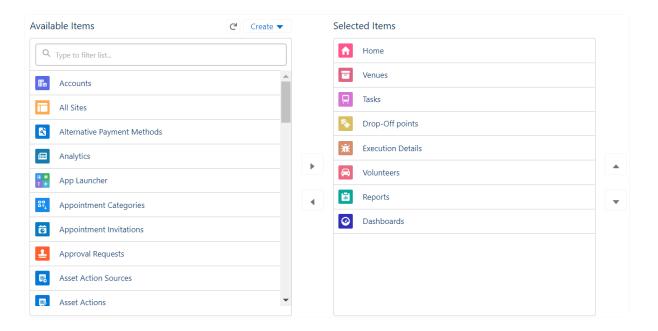
Image: optional (if you want to give any image you can otherwise not mandatory)

Primary color hex value: keep this default.

3.Then click Next >> (App option page)Set Navigation Style as Standard Navigation >> Next.

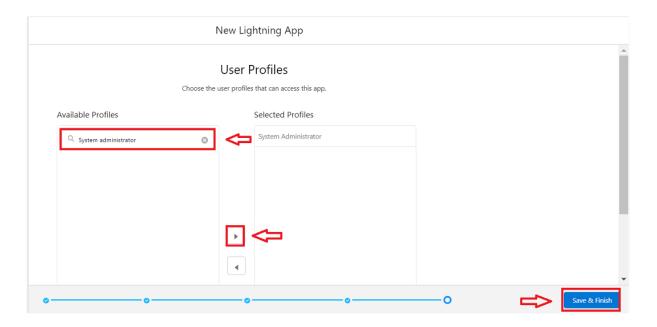


- 4. (Utility Items) keep it as default >> Next.
- 5. To Add Navigation Items:



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

6. To Add User Profiles:

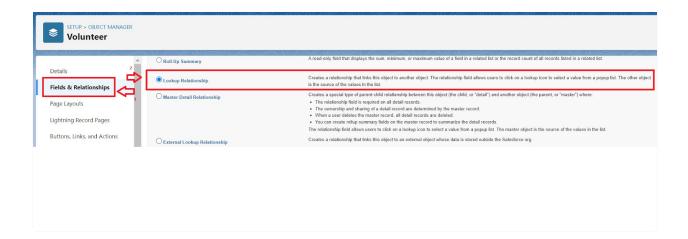


Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

Creation of Relationship fields in objects

Creation of Lookup Relationship Field on Volunteer Object:

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



- 2. Now click on "Fields & Relationships" >> New
- 3. Select Master Detail relationship
- 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.

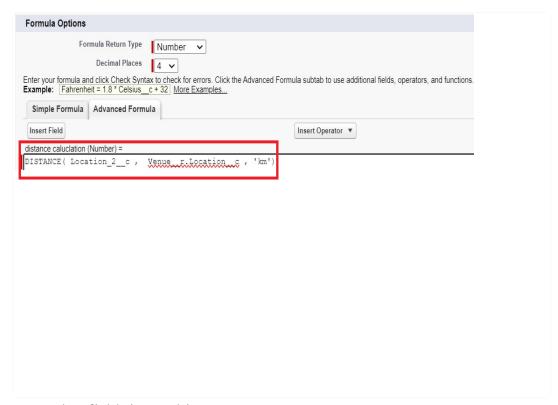
- 2. Now click on "Fields & Relationships" >> New
- 3. Select Data type as a "Geolocation" and Click on Next
- 4. Fill the Above as following:
 - Field Label: Location 2
 - Field Name: gets auto generated
 - Description: Enter the Geolocation of the Drop off Point
 - Geolocation Options: select Decimal
 - 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

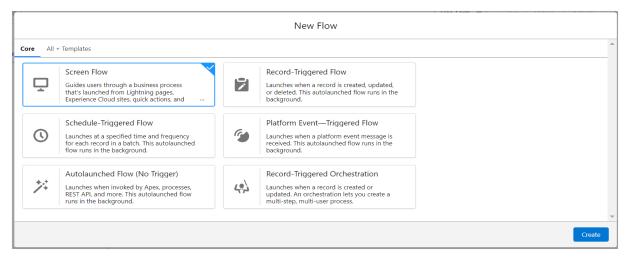
• Decimal Places: 4

• Click on required check box

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

Create Flow to create a record in Venue object

- 1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.
- 2. Select the Screen flow. Click on create.



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

Label: Venue Details

API Name: Venue_Details

5. Now lets add components in this flow. Click on Text Component and name it as:

Label : Venue Name
API Name : Venue_Name

6. Click on Email Component and name it as:

Label: Fmail

API Name: Contact_Email

7. Click on Phone Component and name it as:

Label: Phone

API Name: Contact_Phone

8. Click on Text Component and name it as:

Label: Venue Location

API Name: Venue_Location

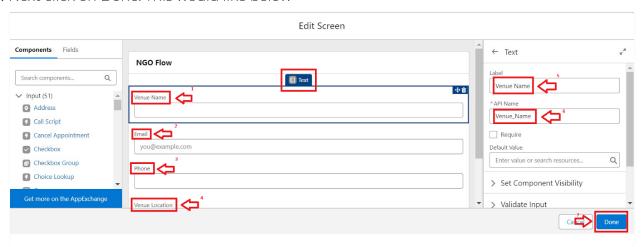
9. Click on Number Component and name it as:

Label : Latitude
API Name : Latitude

10. Click on Number Component and name it as:

Label : longitude
API Name : longitude

11. Next click on Done. This would like below



- 12. 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}

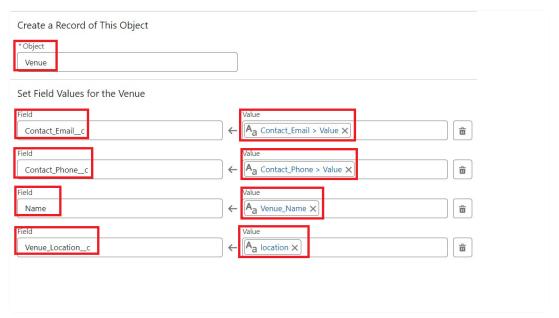
Field: Value = Name: {!Venue_Name}

Field : Value = Venue_Location__c : {!location}

Field: Value = Location__Latitude__s: {!latitude}

Field: Value = Location_Longitude_s: {!longitude}

14. This would look like:



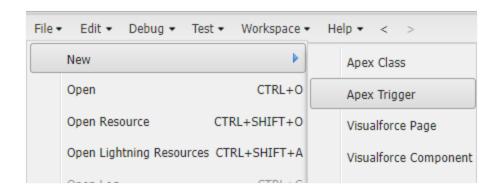
15. Click on Save as:

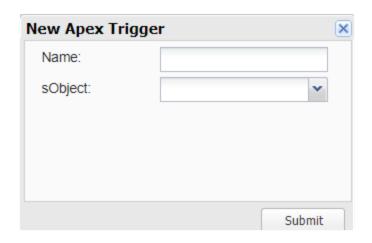
Flow Label: Venue Form

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.





Enter Name: DropOffTrigger sObject: Drop-Off Point

6. Click on Submit.

Creation of User1

1. Go to setup page >> type users in Quick Find bar >> click on users>> New user.

2. In General Information give details as: (Note: create users as per your wish NGO's)

First Name: Iksha Foundation Last Name: Iksha_Foundation

Alias: iiksh

Email: Give Your Email

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

Nickname: Auto Populated

User License: Salesforce Platform

Profile: NGOs Profile

Active: Check

General Information			
First Name	Iksha Foundation	Role	<none specified=""></none>
Last Name	Iksha_Foundation	User License	Salesforce Platform 🗸
Alias	iiksh	Profile	NGOs Profile vi
Email	bhargavipaila1023@gmail.cı	Active	☑
Username	ikshafoundation@sb.com	Marketing User	
Nickname	User1711437164226559933	i Offline User	
Title		Knowledge User	
Company		Flow User	
Department		Service Cloud User	
Division		Site.com Contributor User	

3. Click on Save

Creation of Public Group 1

- 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

Creation of Report Types

- 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.

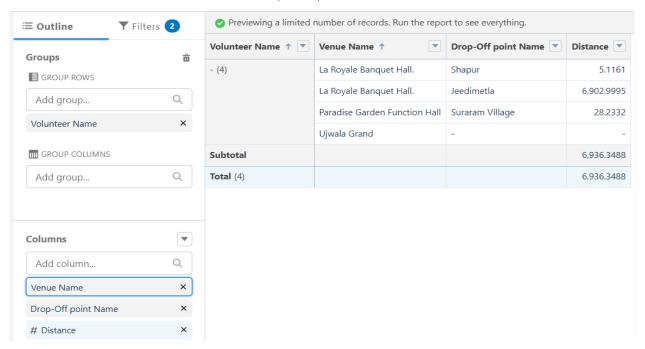
Creation of Report on Venue with DronOff with Volunteer

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

Folder Label : Custom Reports

Folder Unique Name: CustomReports

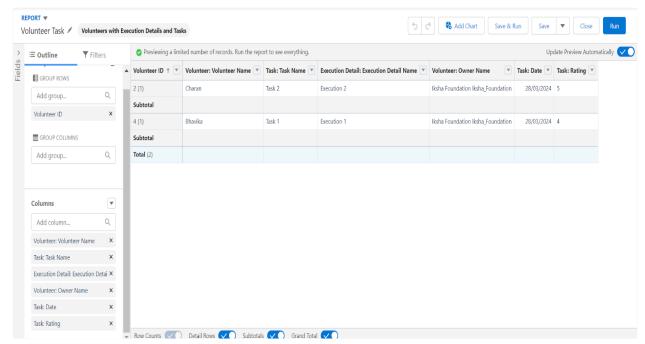
- 3. Open Custom Reports and click on New Report
- 4. Select Report Type: Venue with DropOff with Volunteer
- 5. Then click on Start Report.
- 6. In GROUP ROWS: Add Volunteer Name
- 7. In Columns: Add Venue Name, Drop-Off point Name, Distance.



- 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 Dron Off noint Report to the Dashboard

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

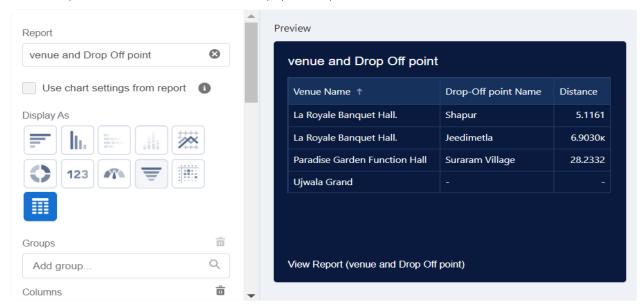
Folder Label: Custom Dashboards

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)



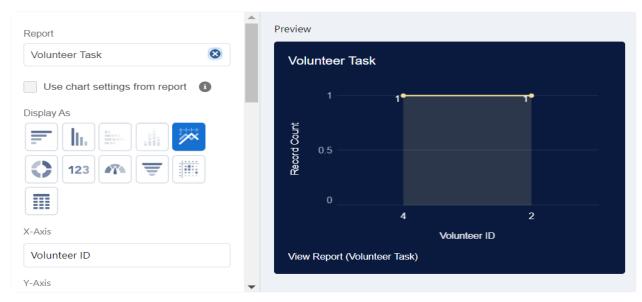
1. Now click on save.

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)

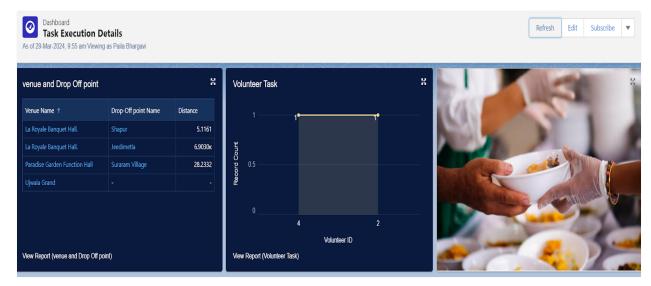
(Note: To upload an image into the Dashboard, we have to first download an image from google or other sources into your system)

- 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.

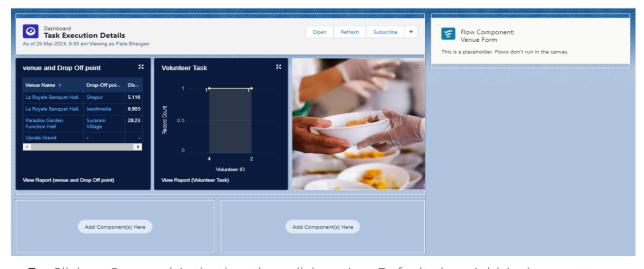


Creation of Home Page

- 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.

