

# Project Title: To Supply Leftover Food to Poor (Salesforce Platform)

Date: November 02, 2025

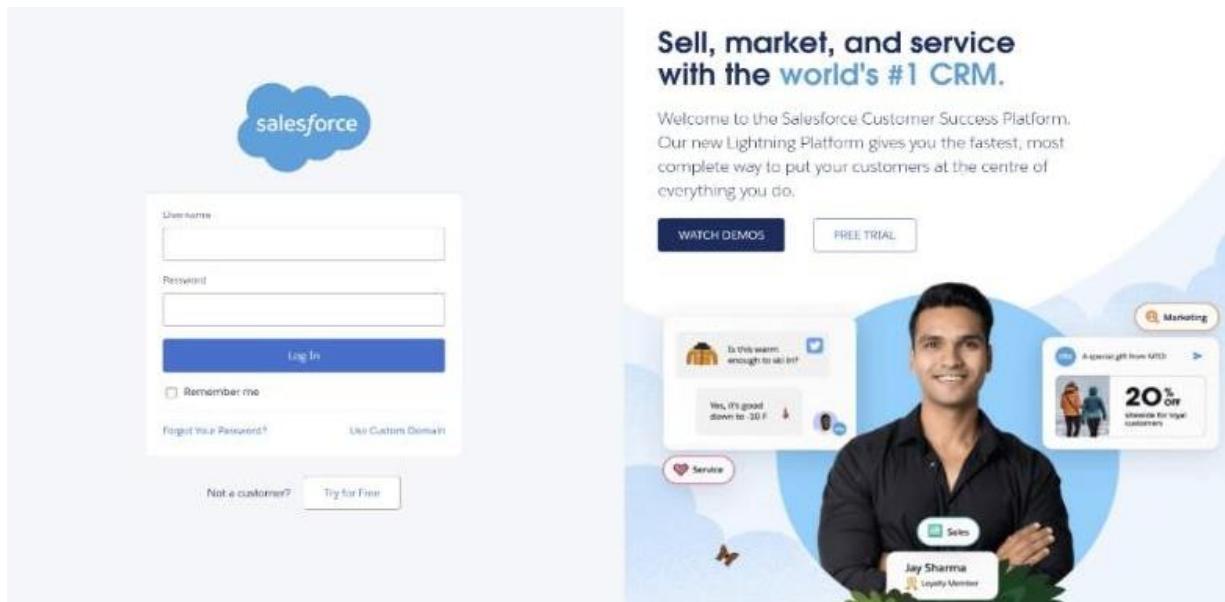
Team ID: NM2025TMID04760

Maximum Marks: 4 Marks

## Phase 5: Performance and Testing

### Salesforce Developer Account Creation

- To sign up for a salesforce account
- To login to your salesforce account
- Account activation



This screenshot shows the 'Setup Home' page in the Salesforce interface. At the top, there are tabs for 'Setup', 'Home', and 'Object Manager'. A search bar is located above the main content area. The main content includes a 'Welcome, Dhanusuya' message and a section titled 'Achieve Popular Business Goals' which lists three categories: 'Connect with Sales Prospects and Customers', 'Track &amp; Manage Customer Data', and 'Capture &amp; Auto-Qualify Leads'. Each category has a brief description and a 'Keep Going' button. Below this, there is a 'Recent Items' section showing a table with columns for 'NAME', 'TYPE', and 'OBJECT'. The table contains several entries, including 'Dhanusuya M' (User), 'Volunteers with Execution Details and Tasks' (Custom Report Type), 'Home' (Lightning Page), and 'FoodConnect Utilitybar' (Lightning Page). A sidebar on the left lists various setup categories like 'Setup Home', 'Salesforce Go', and 'Commerce Setup Assistant'.

# Object Creation

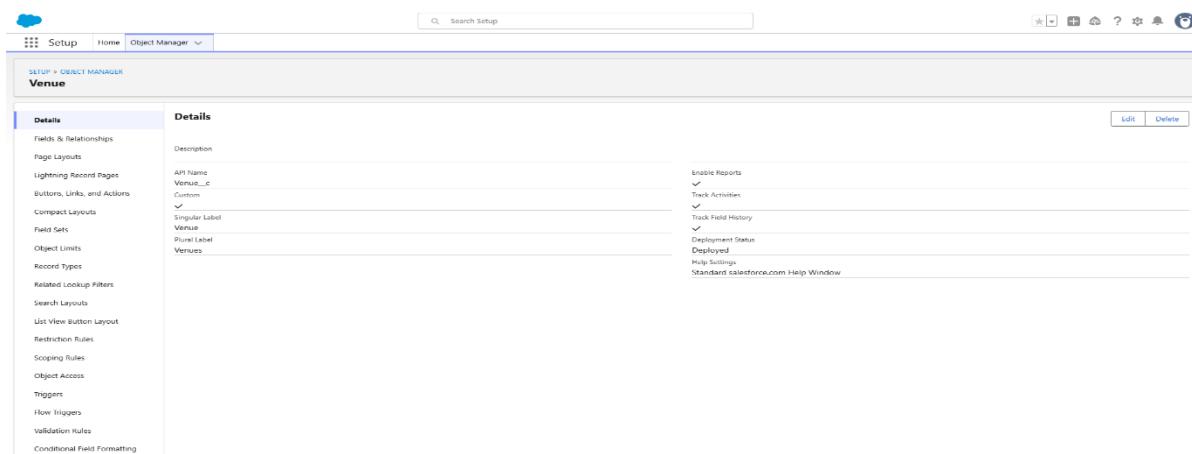
## Venue:

Stores information about locations where leftover food is collected or stored before distribution, including details like address, contact person, and facility capacity.

## To create an object:

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

- Enter the label name >> Venue
- Plural label name >> Venues
- Enter Record Name Label and Format
- Record Name >> Venue Name
- Data Type >> Text
- Click on Allow reports and Track Field History,Allow Activities.
- Allow search >> Save.



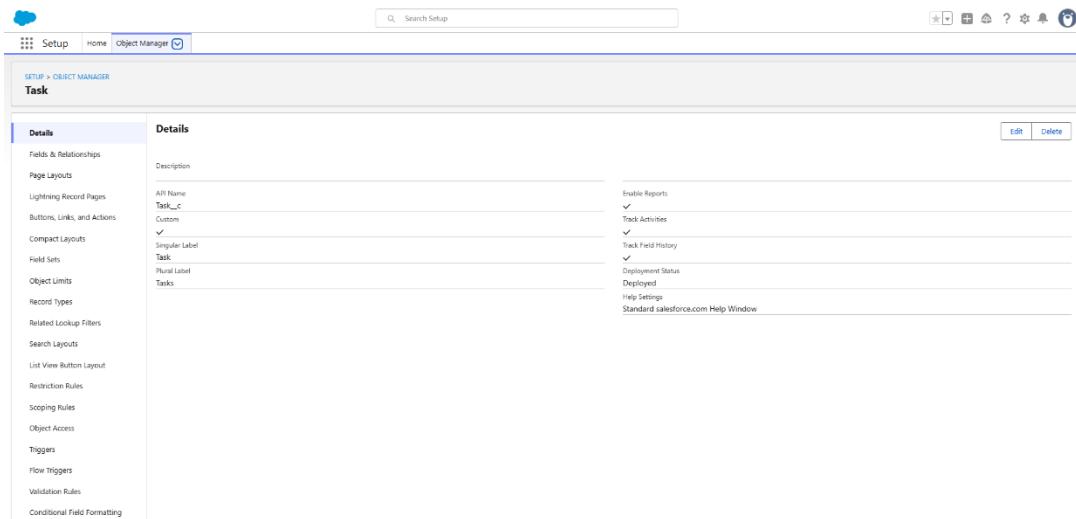
## Task:

Logs specific tasks related to food collection, transportation, and distribution, assigned to volunteers or teams, ensuring accountability and tracking completion status.

## To create an object:

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
4. Click on Allow reports and Track Field History,Allow Activities
5. Allow search >> Save.



## Volunteer:

Manages information about the volunteers, including availability, assigned roles, and contact details, to ensure effective communication and task delegation.

## To create an object:

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
4. Click on Allow reports and Track Field History, Allow Activities
5. Allow search >> Save

## 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
4. Click on Allow reports and Track Field History, Allow Activities
5. Allow search >> Save.

## Drop-Off Point:

This object records information about specific locations where food donations are delivered for distribution.

## 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
4. Click on Allow reports and Track Field History, Allow Activities
5. Allow search >> Save.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A new object named 'Drop-off point' is being created. The 'Details' tab is active, showing the following configuration:

Details	Details
Description	API Name: Drop_off_point__c Custom: ✓ Singular Label: Drop-off point Plural Label: Drop-off point
	Enable Reports: ✓ Track Activities: ✓ Track Field History: ✓ Deployment Status: Deployed Help Settings: Standard salesforce.com Help Window

The left sidebar lists various object settings such as Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, and Conditional Field Formatting.

## Creation of Custom tabs

**To create a custom tab for each of your project's objects, follow these steps:**

1. **Log in to Salesforce:** Ensure you're logged in with administrator privileges.
2. **Access Setup:** Click the gear icon in the top-right corner and select "Setup."
3. **Navigate to Tabs:** In the Quick Find box, type "Tabs" and select "Tabs" from the list.
4. **Create New Custom Object Tab:**
  - Click **New** next to "Custom Object Tabs."
  - Select the **Object** for the tab (e.g., Venue, Drop-Off Point, Execution Details, Volunteer, or Task).
  - Choose a **Tab Style** (an icon that represents the tab visually).
5. **Tab Label and Visibility:**
  - Enter a **Label** for the tab that will appear to users (e.g., "Venue" for the Venue object).
  - Select **Profiles** to determine which users will have access to this tab.

## 6. Save and Organize:

- After saving, add the tab to the relevant **App** (e.g., your project's custom app for food distribution) so it's accessible within the application.

Use **App Manager** to arrange the tabs in your preferred order.

The screenshot shows the Salesforce Setup interface with the 'Tabs' section selected. The left sidebar includes links for Feature Settings, Analytics, Tableau, User Interface, Console Settings, and Tabs. The main content area is titled 'Tabs' and contains sections for 'Custom Tabs', 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs'. Under 'Custom Tabs', there is a table listing tabs like 'Books', 'Code', 'Diamond', 'Chesse piece', and 'Cat'. Under 'Lightning Component Tabs', there is a table listing tabs like 'Home', 'Map', 'Heart', 'Building Block', and 'Gears'. Each table has columns for Action, Label, and Tab Style.

## Lightning apps

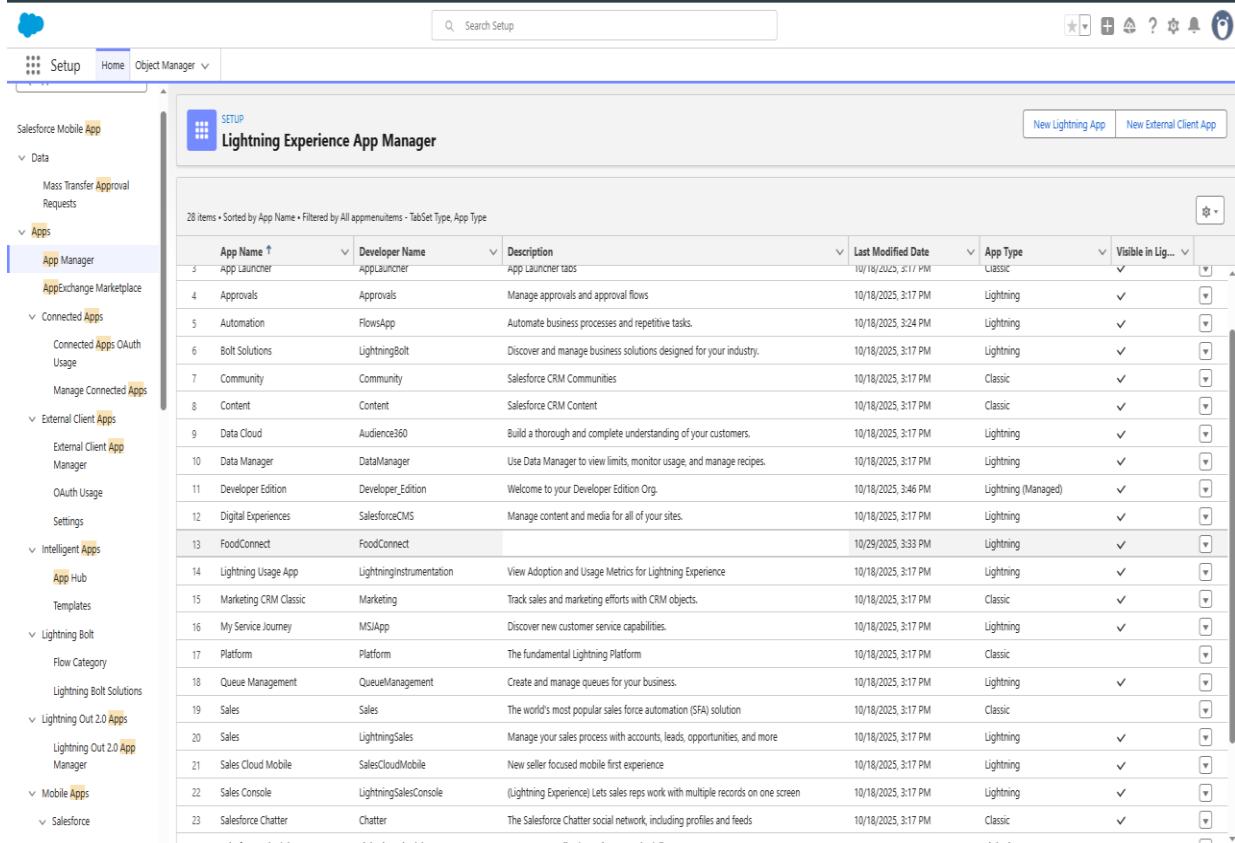
Lightning Apps in Salesforce consist of a set of tabs and components that work together to enable specific functions. They have a name, logo, and a customizable set of tabs. There are two types of Salesforce applications:

1. **Standard Apps:** Default apps that come with Salesforce (e.g., Sales, Marketing, Chatter).
2. **Custom Apps:** Tailored apps with selected standard and custom tabs to meet specific needs.

### creation of lightning apps

- **Access App Manager:** In Salesforce Setup, type "App Manager" in the Quick Find box and select it.
- **Create a New Lightning App:** Click on "New Lightning App" and enter the app name (e.g., "Food Supply Management").
- **Configure App Options:** Set the app's visibility, logo, branding, and any custom settings. Keep the default settings if not specified.
- **Utility Bar (Optional):** Add tools like Notes or Chat to the app's utility bar if needed.

- **Select Tabs:** Choose the objects and tabs you want to include, such as "Venue," "Drop-Off," "Execution Details," "Volunteer," and "Task" for a food distribution app.
- **Assign Profiles:** Specify which user profiles can access the app by moving relevant profiles (e.g., System Administrator) to "Selected Profiles."
- **Save and Launch:** Click "Save & Finish" to complete setup. Access the app through the App Launcher to verify that all tabs and settings appear correctly.



The screenshot shows the Salesforce Setup interface with the 'Lightning Experience App Manager' page open. The left sidebar shows various app categories like Data, Connected Apps, External Client Apps, Intelligent Apps, and Mobile Apps. The main area displays a table of 28 items, sorted by App Name. The columns include App Name, Developer Name, Description, Last Modified Date, App Type, and Visible in Lig... (with checkboxes). Examples of listed apps include 'App Launcher', 'Approvals', 'Automation', 'Bolt Solutions', 'Community', 'Content', 'Data Cloud', 'Data Manager', 'Developer Edition', 'Digital Experiences', 'FoodConnect', 'Lightning Usage App', 'Marketing CRM Classic', 'My Service Journey', 'Platform', 'Queue Management', 'Sales', 'Sales Cloud Mobile', 'Sales Console', and 'Salesforce Chatter'.

App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visible in Lig...
3 App Launcher	AppLauncher	App Launcher tabs	10/18/2025, 3:17 PM	Classic	✓
4 Approvals	Approvals	Manage approvals and approval flows	10/18/2025, 3:17 PM	Lightning	✓
5 Automation	FlowsApp	Automate business processes and repetitive tasks.	10/18/2025, 3:24 PM	Lightning	✓
6 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	10/18/2025, 3:17 PM	Lightning	✓
7 Community	Community	Salesforce CRM Communities	10/18/2025, 3:17 PM	Classic	✓
8 Content	Content	Salesforce CRM Content	10/18/2025, 3:17 PM	Classic	✓
9 Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	10/18/2025, 3:17 PM	Lightning	✓
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	10/18/2025, 3:17 PM	Lightning	✓
11 Developer Edition	Developer_Edition	Welcome to your Developer Edition Org.	10/18/2025, 3:46 PM	Lightning (Managed)	✓
12 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	10/18/2025, 3:17 PM	Lightning	✓
13 FoodConnect	FoodConnect		10/29/2025, 3:33 PM	Lightning	✓
14 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	10/18/2025, 3:17 PM	Lightning	✓
15 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	10/18/2025, 3:17 PM	Classic	✓
16 My Service Journey	MSIApp	Discover new customer service capabilities.	10/18/2025, 3:17 PM	Lightning	✓
17 Platform	Platform	The fundamental Lightning Platform	10/18/2025, 3:17 PM	Classic	✓
18 Queue Management	QueueManagement	Create and manage queues for your business.	10/18/2025, 3:17 PM	Lightning	✓
19 Sales	Sales	The world's most popular sales force automation (SFA) solution	10/18/2025, 3:17 PM	Classic	✓
20 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	10/18/2025, 3:17 PM	Lightning	✓
21 Sales Cloud Mobile	SalesCloudMobile	New seller focused mobile first experience	10/18/2025, 3:17 PM	Lightning	✓
22 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	10/18/2025, 3:17 PM	Lightning	✓
23 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	10/18/2025, 3:17 PM	Classic	✓

## creating fields and relationship fields in object

- **Standard Fields:** These are predefined by Salesforce, like "Name" and "Created Date."
- **Custom Fields:** Add fields to capture specific information for each object.
- **Relationship Fields:**
- **Lookup Relationship:** Links two objects loosely, allowing null values.
- **Master-Detail Relationship:** A tighter link where the child object depends on the parent, inheriting permissions and sharing settings.

## **Creating Relationships:**

**In Setup**, go to the **Object Manager**.

- Open the object where you want to add a relationship field.
- Select **Fields & Relationships**, then

**New**. Choose the type of relationship field:

- For **Lookup**, select another object to link.
- For **Master-Detail**, select the parent object.
- Set field visibility, add help text, and save.

## **Creating key objects for fields**

### **a. Venue Object**

- **Purpose:** To store locations where food is available for pickup.
- **Key Fields:**
  - **Venue Name** (*Text*): Name of the venue.
  - **Address** (*Text Area*): Detailed address of the venue.
  - **Contact Number** (*Phone*): Venue's contact information.
  - **Capacity** (*Number*): Maximum amount of food that can be stored at this venue.
  - **Venue Type** (*Picklist*): Options like "Restaurant," "Event Hall," or "Catering Service."
  - **Status** (*Picklist*): Indicates availability (e.g., Available, Closed).
- **Relationships:**
  - **Related to Drop-Off** (Lookup or Master-Detail with Drop-Off Point): Shows available drop-off points for each venue.

### **b. Drop-Off Point Object**

- **Purpose:** To track locations where food is delivered.
- **Key Fields:**
  - **Drop-Off Location Name** (*Text*): Name of the drop-off point.
  - **Distance** (*Number*): Distance from the venue to drop-off point.
  - **Address** (*Text Area*): Detailed address.
  - **Operational Hours** (*Text*): Hours during which drop-off is accessible.

- **Relationships:**
  - **Linked Venue** (Lookup or Master-Detail with Venue): Connects each drop-off point to a specific venue for reference.

### c. Task Object

- **Purpose:** To track tasks associated with food collection and delivery.
- **Key Fields:**
  - **Task Name** (*Text*): Brief name of the task.
  - **Description** (*Text Area*): Details about the task.
  - **Assigned Volunteer** (Lookup with Volunteer): Assigns a volunteer to each task.
  - **Due Date** (*Date*): When the task needs to be completed.
  - **Priority** (*Picklist*): Options like High, Medium, Low.
- **Relationships:**
  - **Related Venue or Drop-Off** (Lookup): Links tasks to specific venues or drop-off points as needed.

### d. Volunteer Object

- **Purpose:** To manage volunteer details.
- **Key Fields:**
  - **Volunteer Name** (*Text*): Full name of the volunteer.
  - **Contact Information** (*Phone*): Phone number of the volunteer.
  - **Email** (*Email*): Volunteer's email address.
  - **Availability** (*Picklist*): Options like "Available," "Not Available," "Part-Time."
- **Relationships:**
  - **Assigned Tasks** (Master-Detail or Lookup with Task): Links volunteers to specific tasks.
  - **Associated Venues** (Lookup or Master-Detail with Venue): Allows linking volunteers to specific venues if needed.

### e. Execution Details Object

- **Purpose:** To record details of each food delivery event.
- **Key Fields:**
  - **Execution Name** (*Text*): Name of the execution event.
  - **Start Date** (*Date*): Start date of the event.
  - **End Date** (*Date*): Completion date.

- **Total Food Distributed** (*Number*): Quantity of food distributed.
- **Volunteers Involved** (*Lookup with Volunteer*): Record of volunteers who participated.
- **Challenges Encountered** (*Text Area*): Brief description of any issues faced.

## Relationships:

- **Venue and Drop-Off Link** (*Lookup with Venue and Drop-Off*): Links the execution details with specific venues and drop-off points.

The screenshot shows the Salesforce Object Manager interface for the 'Drop-off point' object. The 'Fields & Relationships' tab is active. A table lists the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Distance	Distance__c	Number(14, 4)		
distance calculation	distance_calculation__c	Formula (Number)		
Drop-off point Name	Name	Text(80)		
Last Modified By	LastModifiedBy	Lookup(User)		
Location 2	Location_2__c	Geolocation		
Owner	OwnerId	Lookup(User/Group)		
State	State__c	Picklist		
Venue	Venue__c	Lookup(Venue)		

## Flow

In Salesforce, **Flows** are powerful automation tools that can automate processes such as record creation, updates, notifications, and complex logic. Here's an overview of creating flows, and then specifically, setting up a flow to create a record in the **Venue** object.

- **Screen Flows:** Used for guided user input; can be used on pages.
- **Record-Triggered Flows:** Automatically trigger on record creation, updates, or deletions.
- **Scheduled Flows:** Run on a set schedule to perform routine tasks.

- **Platform Event-Triggered Flows:** Triggered by platform events for real-time integration.

## Steps to Create a Flow to Add a Venue Record

### 1. Start a New Flow

- Go to **Setup** in Salesforce, type **Flows** in the Quick Find box, and select **Flows**.
- Click **New Flow**.
- For this task, select **Screen Flow** if you want user input for creating a **Venue** record or **Record-Triggered Flow** if it should automatically create **Venue** records under specific conditions.

### 2. Configuring the Flow

- **Screen Flow Setup:**
  - **Step 1:** Drag a **Screen** element from the **Toolbox** on the left.
  - **Step 2:** On the screen, add fields that users will fill out, such as **Venue Name**, **Address**, **Contact Number**, **Capacity**, and any other relevant fields.
  - **Step 3:** Set component types to match field data (e.g., Text, Phone, Number, Picklist).
- **Record-Triggered Flow Setup:**
  - **Step 1:** In **Trigger the Flow When**, select **A record is created**.
  - **Step 2:** Choose the object and specify any criteria that should trigger the record creation.

### 3. Adding the Create Record Element

- Click **+ Add Element** in the flow canvas and select **Create Records**.
- **Label** the action, for example, "Create Venue Record."
- **Select the Venue Object:** Choose **Venue** as the object where the record will be created.

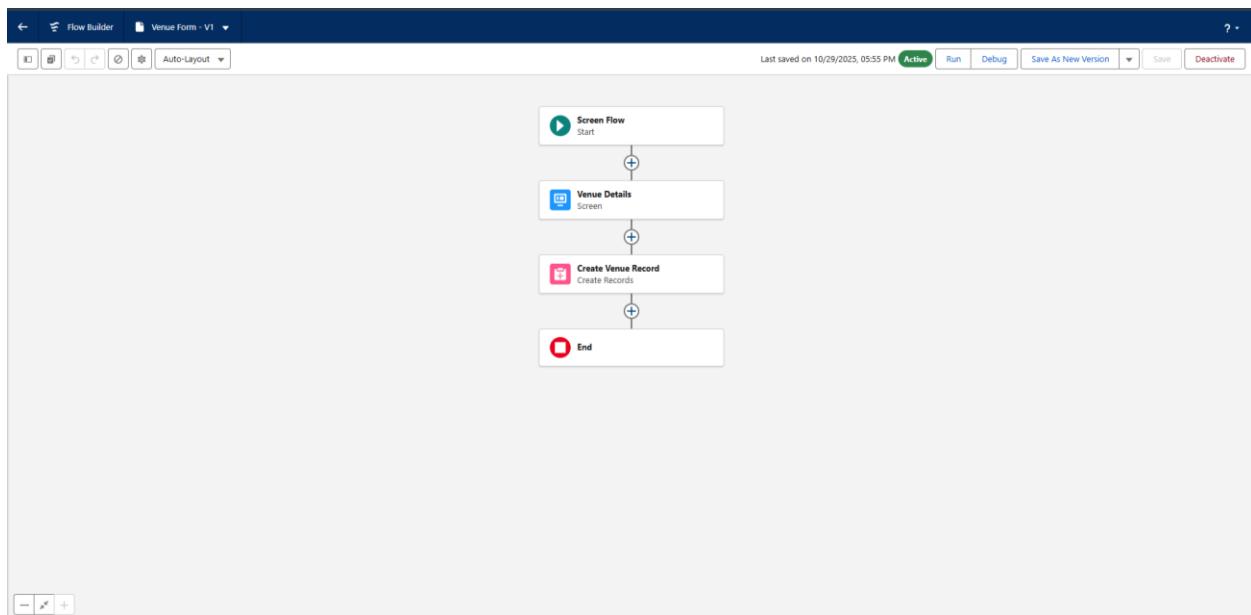
### 4. Define the Field Values

- Map the fields in the **Venue** object to the corresponding input fields or variables:

- **Venue Name:** Map to the name input provided by the user or predefined value.
- **Address:** Link to a text input field.
- **Contact Number:** Map to the phone input field.
- **Capacity:** Map to the number input field.
- **Choose Fields and Set Values:** Ensure that required fields are mapped.

## 5. Save and Activate the Flow

- Click **Done** to save the element setup.
- **Save the Flow** with a descriptive name, such as "Create Venue Record Flow."
- Activate the flow by clicking **Activate** in the Flow Builder toolbar.



## Testing And Validation

### Trigger

To create a **trigger** in Salesforce that automatically creates a record in the **Venue** object based on a specific condition or event, you'll need to write an **Apex Trigger**. Here's a step-by-step guide, along with an example trigger.

### Steps to Create a Trigger in Salesforce

#### 1. Access Developer Console:

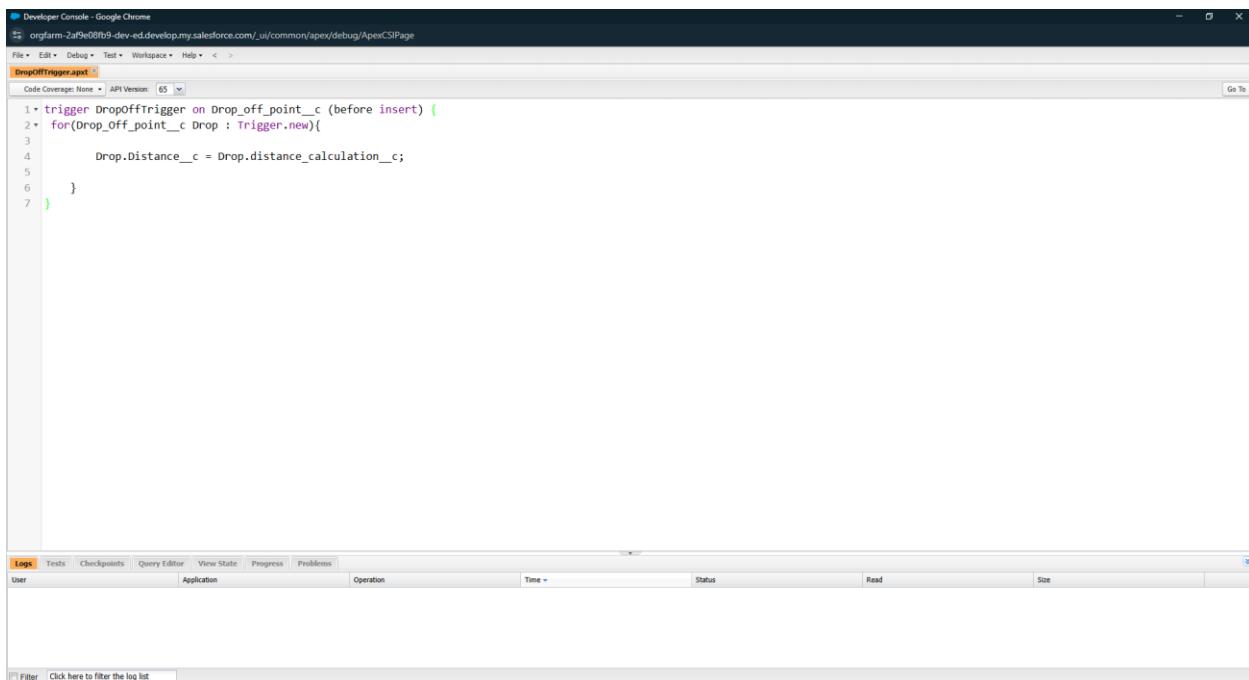
- In Salesforce, click the **Gear Icon** ( $\odot$ ) and select **Developer Console**.

## 2. Create a New Trigger:

- In the Developer Console, go to **File > New > Apex Trigger**.
- Choose the object you want the trigger to be associated with. For instance, if you want the trigger to create a **Venue** record when a **Task** record is created, select the **Task** object.
- Name the trigger (e.g., `CreateVenueOnTaskTrigger`).

## 3. Define the Trigger Logic:

- Define when the trigger should fire, such as **before insert** or **after insert**.
- Specify the actions the trigger will take, such as creating a new **Venue** record.



The screenshot shows the Salesforce Developer Console interface. The title bar reads "Developer Console - Google Chrome" and the URL is "orgfarm-2af9e08fb9-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSPage". The main area displays the Apex trigger 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;
    }
}
```

Below the code editor is a log viewer with tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Logs tab is selected. The log table has columns: User, Application, Operation, Time, Status, Read, and Size. There are no logs listed in the table.

## Steps to Create and Configure Profiles in Salesforce

### 1. Accessing Profiles

- In **Setup**, type **Profiles** in the Quick Find box and select **Profiles**.
- You will see a list of existing profiles, including both standard

and custom profiles.

## 2. Creating a New Profile

- To create a custom profile, you can either clone an existing profile or start from scratch.
- **Clone a Profile:**
  - Select a standard profile (like "Standard User") that closely matches the permissions you need.
  - Click **Clone** to create a new profile based on this existing profile.

## 3. Configuring Profile Settings

- **Profile Name:** Name your profile, e.g., "Venue Manager" or "Volunteer Coordinator".
- **Object Permissions:**
  - Scroll down to **Custom Object Permissions**.
  - For each custom object (e.g., **Venue**, **Drop-Off Point**, **Task**, **Volunteer**, **Execution Details**), set the appropriate permissions:
    - **Read:** Allows viewing records.
    - **Create:** Allows creating new records.
    - **Edit:** Allows editing existing records.
    - **Delete:** Allows deleting records.
  - For example, a "Venue Manager" profile might have full access to the **Venue** object but limited access to other objects.
- **Field-Level Security:**
  - Go to each custom object and specify **Field-Level Security** for each field.
  - Set fields to **Read-Only** or **Hidden** if certain data should not be edited or viewed by this profile.
- **Tab Settings:**
  - Under **Tab Settings**, control which tabs users with this profile can see.
  - Set each tab (e.g., **Venue**, **Task**) to **Default On**, **Default Off**, or **Hidden**.
- **Page Layout Assignment:**
  - For each object, assign a **Page Layout** to control how information is displayed to users.

- For instance, for the **Venue** object, a manager might see more detailed layouts, while volunteers see a simpler version.

#### **4. Assigning Profiles to Users**

- After setting up a profile, assign it to users.
- Go to **Setup > Users**, find the user, and edit their profile to assign the new custom profile

#### **5. Assigning Profiles to Users**

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#### **Creation of Users**

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)

FirstName: Iksha Foundation

LastName: 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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Esrest	Chatter	chath_00de50000000swav.dobell006m@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	QERIC	QERIC	eric.b1534609423d@orfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Baba_Foundation_Iksha_foundation	iksh	bafoundation@st.com		<input checked="" type="checkbox"/>	NGOs
<input type="checkbox"/>	M_Chamaika	dba	dhanusri.m204974@aventforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	MSA_NSA	msa	kd71002@gmail.com		<input checked="" type="checkbox"/>	NGOs
<input type="checkbox"/>	street_cause_street_cause	site	streetcause@ymail.com		<input checked="" type="checkbox"/>	NGOs
<input type="checkbox"/>	User_Interation	inter	interaction@00dy50000000wiznay.com		<input checked="" type="checkbox"/>	Analytics Cloud Interation User
<input type="checkbox"/>	User_Security	sec	icsophsecuity@00go50000000elzney.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

## Creation of public group1&2

1. Go to setup page >> type Public Groups in Quick Find bar >> click on Public Groups >> click on New.
2. Under Group Information:
  - a. Label : Iksha
  - b. Group Name : Iksha
  - c. Grant Access Using Hierarchies : Check
3. In Search, Select Users.
4. In Selected Members Add Iksha Foundation and System Administrator
5. By Following Steps in Activity 1, Create other two Public Groups for other two users.
6. After Saving this would look like this.

Action	Label	Group Name	Created By	Created Date
Edit   Del	Itaha	Itaha	M_Dhanushya	10/29/2025, 1:59 PM
Edit   Del	NSS	NSS	M_Dhanushya	10/29/2025, 2:00 PM
Edit   Del	Street cause	Street cause	M_Dhanushya	10/29/2025, 2:00 PM

## Creation of report types

1. Go to setup page >> type Report Types in Quick Find bar >> click on Report Types >> click on Continue >> Click on New Custom Report Type.
2. In Define the Custom Report Type:
  - a. Primary Object : Select Venues
  - b. Report Type Label : Venue with Drop Off with Volunteer
  - c. Report Type Name : Venue\_with\_Drop Off\_with\_Volunteer
  - d. Description : Venue with Drop Off with Volunteer
  - e. Store in Category : Select Other Reports
  - f. 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.

### I. Creation of Report on Venue with Drop Off with Volunteer

1. Go to the app(Food Connect) >> click on the reports tab
2. Click on New Folder.  
Folder Label : Custom Reports  
Folder Unique Name : Custom Reports

3. Open Custom Reports and click on New Report
4. Select Report Type : Venue with Drop Off 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

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

## I. Creation of Report on Volunteers with Execution Details and Tasks

1. Go to the app(Food Connect) >> click on the reports tab
2. Click on Custom Reports Folder and click on New Report
3. Select Report Type : Volunteers with Execution Details and Tasks.
4. Then click on Start Report.
5. In GROUP ROWS : Volunteer ID
6. In Columns : Add Volunteer : Volunteer Name, Task : Task Name, Execution Detail : Execution Detail Name, Volunteer: Owner Name, Task: Date, Task : Rating.
7. Now click on Save & Run.
8. Give Label as :

Report Name : Volunteer Task

Report Unique Name : Auto Populated

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

Name	Description	Category	Created Date	Created By
Drop-off point with Volunteers with Execution Details	Drop-off point with Volunteers with Execution Details	Other Repor...	10/29/2023, 12:57 PM	dha
Orchestration Log Spring '24	Find out which orchestration run logs were created and what happened in their associated orchestrations.	Other Repor...	10/18/2023, 3:17 PM	autopro
Orchestration Runs Spring '24	Find out which orchestration runs were created.	Other Repor...	10/18/2023, 3:17 PM	autopro
Orchestration Stage Runs Spring '24	Find out which orchestration stage runs were created and the current status of each run.	Other Repor...	10/18/2023, 3:17 PM	autopro
Orchestration Step Runs Spring '24	Find out which orchestration step runs were created and the current status of each run.	Other Repor...	10/18/2023, 3:17 PM	autopro
Orchestration Work Items Spring '24	Find out which orchestration work items were created, who's the associated assignee, and what's the current status.	Other Repor...	10/18/2023, 3:17 PM	autopro
Program Definition Spring '24	Review your analytics with a program-like structure. See each program task, target day, results, and more.	Other Repor...	10/18/2023, 3:17 PM	autopro
Program Definition Summer '24	Review your analytics with a program-like structure. See each program task, target day, results, and more.	Other Repor...	10/18/2023, 3:17 PM	autopro
Program Item Progress Spring '24	Report on tasks like exercises, milestones, and outcomes progress. Overall program progress isn't captured.	Other Repor...	10/18/2023, 3:17 PM	autopro
Program Item Progress Summer '24	Report on tasks like exercises, milestones, and outcomes progress. Overall program progress isn't captured.	Other Repor...	10/18/2023, 3:17 PM	autopro
Program Progress Spring '24	Report on program progress. Specific progress on milestones and exercises aren't captured in this report.	Other Repor...	10/18/2023, 3:17 PM	autopro
Program Progress Summer '24	Report on program progress. Specific progress on milestones and exercises aren't captured in this report.	Other Repor...	10/18/2023, 3:17 PM	autopro
Screen Flows	Find out which flows get executed and how long users take to complete each flow screen.	Other Repor...	10/18/2023, 3:17 PM	autopro
Venue with DropOff with Volunteer	Venue with DropOff with Volunteer	Other Repor...	10/29/2023, 2:04 PM	dha
Volunteers with Execution Details and Tasks.	Volunteers with Execution Details and Tasks.	Other Repor...	10/29/2023, 10:28 PM	dha

## Steps to Create a Dashboard in Salesforce

- 1. Access Dashboards:**
  - Go to the **Dashboards** tab in Salesforce.
  - Click **New Dashboard** to create a new dashboard.
- 2. Set Dashboard Properties:**
  - **Name:** Enter a name, such as "Food Distribution Overview."
  - **Description:** Provide a brief description of what the dashboard tracks, e.g., "Tracks venues, volunteer tasks, and distribution statistics."
  - **Folder:** Select a folder to save the dashboard. This controls visibility for other users.
  - **View As:** Set who should be the running user for the dashboard. This setting defines whose data permissions are applied when viewing the dashboard.
- 3. Add Dashboard Components:**
  - Click **+ Component** to add a report component to the dashboard.
  - Choose a report to use (only saved reports can be added).
  - Select a **Component Type** (e.g., bar chart, pie chart, table) that best represents the data.
  - Customize the component's settings, including title, display units, and colors.
- 4. Arrange and Customize Components:**
  - **Resize and Reposition:** Drag components to rearrange and resize them for better visual flow.
  - **Component Details:** Edit each component's title and subtitle to ensure they're descriptive (e.g., "Tasks Completed by Volunteers" or "Food Distributed by Venue").
  - **Apply Filters:** Set global filters for the dashboard, such as filtering by time period or specific locations, which will apply to all components.
- 5. Save and View Dashboard:**
  - Click **Save** to save your progress.

### I.Adding venue and Drop Off point Report to the Dashboard

1. Go to the app(Food Connect) >> 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)Now click on save.

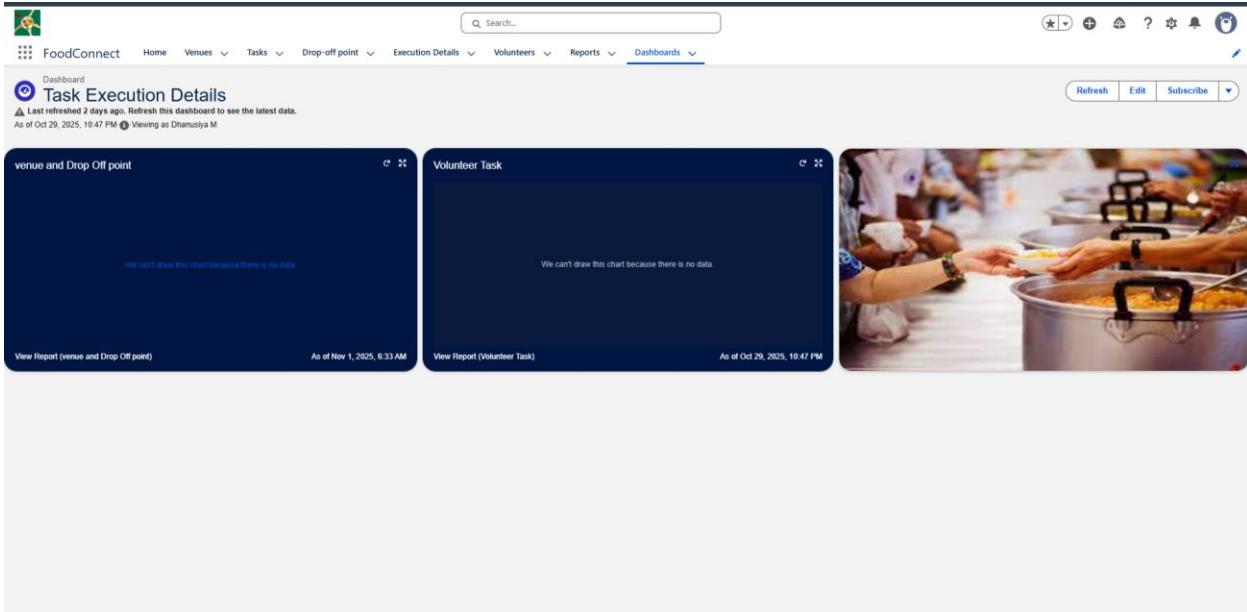
### II. Adding Volunteer Task Report to the Dashboard

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)

### III. Adding a Picture to the Dashboard

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 :
  - a. Name : Task Execution Details
  - b. Click on Select Folder and select Custom Dashboards
4. Click on Select Folder and then Save.

The screenshot shows the FoodConnect application's dashboard management interface. On the left, there is a sidebar with navigation links for Dashboards, Recent, DASHBOARDS (Recent, Created by Me, Private Dashboards, All Dashboards), FOLDERS (All Folders, Created by Me, Shared with Me), and FAVORITES (All Favorites). The main area displays a table for creating a new dashboard. The table has columns for Dashboard Name (set to 'Task Execution Details'), Description, Folder (set to 'Custom Dashboards'), Created By (set to 'Dhanushya M'), Created On (set to '10/29/2025, 2:27 PM'), and Subscribed. There are also search and filter options at the top of the table. The top navigation bar includes links for Home, Venues, Tasks, Drop-off point, Execution Details, Volunteers, Reports, and Dashboards, along with a search bar and various icons for account and system management.



## 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:
  - i. Label : Rule 1
  - ii. Rule Name : Rule\_1
4. Select your rule type : Select Based on criteria.
5. Select which records to be shared:
  - i. Field : Operator : Value = Distance : less than : 15
6. Select the users to share with : Near Share With
  - i. Public Groups : Iksha
7. Click on Save.
8. Click on new near Drop-Off point Sharing Rules and Name it as:
  - i. Label : Rule 2
  - ii. Rule Name : Rule\_2
9. Select your rule type : Select Based on criteria.
10. Select which records to be shared:
11. Field : Operator : Value = Distance : greater than : 15
12. Field : Operator : Value = Distance : less or equal : 30
13. Select the users to share with : Near Share With
  - i. Public Groups : NSS
14. Click on Save.
15. Click on new near Drop-Off point Sharing Rules and Name it as:

- i. Label : Rule 3
  - ii. Rule Name : Rule\_3
16. Select your rule type : Select Based on criteria.
17. Select which records to be shared:
- i. Field : Operator : Value = Distance : greater than : 30
  - ii. Field : Operator : Value = Distance : less or equal : 50
18. Select the users to share with : Near Share With
- i. Public Groups : Street Cause
19. Click on Save.

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The left sidebar navigation includes Data Integration Rules, Duplicate Management, Matching Rules, Feature Settings, Marketing, Lead Assignment Rules, Lead Auto-Response Rules, Service, Case Assignment Rules, Case Auto-Response Rules, Conversation Intelligence Rules, Escalation Rules, Sensitive Data Rules for Enhanced Channels, Objects and Fields, Object Manager, Process Automation, Workflow Rules, Security, Guest User Sharing Rule, and Access Report. The main content area displays 'Sharing Settings' with sections for Work Plan Sharing Rules, Work Plan Template Sharing Rules, Work Step Template Sharing Rules, Work Type Sharing Rules, Work Type Group Sharing Rules, Drop-off point Sharing Rules, Task Sharing Rules, and Venue Sharing Rule. The 'Drop-off point Sharing Rules' section is expanded, showing a table with columns for Action, Criteria, Shared With, and Access Level. One row in the table specifies 'Edit | Del' with criteria 'Drop-off point: Distance LESS THAN 15' and 'Drop-off point: Distance GREATER THAN 15 AND (Drop-off point: Distance LESS OR EQUAL 30)'. It also specifies 'Drop-off point: Distance GREATER THAN 30 AND (Drop-off point: Distance LESS OR EQUAL 50)' and 'Shared With: Group\_Itsha, Group\_NIS, Group\_StreetCause' and 'Access Level: Read Only'.

## 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 Food Connect App and then Save.
9. Food Connect Home Page would Look Like this.

The screenshot shows the Food Connect application interface. At the top, there's a navigation bar with links for Home, Venues, Tasks, Drop-off point, Execution Details, Volunteers, Reports, and Dashboards. Below the navigation is a search bar and a toolbar with icons for Post, File, and New Event. The main content area has a title 'Task Execution Details' with a note about last refresh. It includes two cards: 'venue and Drop Off point' and 'Volunteer Task', both stating 'We can't draw this chart because there is no data.' To the right is a 'Venue Form' section with fields for Venue Name, Email (with placeholder 'you@example.com'), Phone, Venue Location, Latitude, and Longitude. A 'Next' button is at the bottom right of the form.

## Goals:

- ❖ **Streamline Food Collection** – Enable donors to easily register and donate leftover food.
- ❖ **Centralize Data Management** – Use Salesforce to store and manage donor, volunteer, and recipient data.
- ❖ **Optimize Logistics** – Automate routes and volunteer assignments for efficient food delivery.
- ❖ **Track and Report** – Monitor donation flows and generate reports to improve operations.
- ❖ **Enhance Communication** – Keep donors and volunteers informed through updates and alerts.
- ❖ **Ensure Food Safety** – Maintain quality standards and train volunteers in food handling.
- ❖ **Plan for Expansion** – Build a scalable system to support future growth in different regions.
- ❖ **Raise Awareness** – Use marketing tools to engage the community and attract more support.

## **Conclusion**

The Food Distribution Project in Salesforce optimizes the process of collecting and distributing leftover food to those in need. By using Salesforce objects for Venue, Drop-Off Point, Task, Volunteer, and Execution Details, the project enables efficient tracking of food collection sites, distribution locations, and volunteer assignments. Automation through flows and triggers reduces manual tasks, while custom profiles and sharing rules ensure data security, allowing users to access only the information relevant to their roles.

Real-time dashboards and reports provide valuable insights into distribution metrics, volunteer activity, and task progress, supporting data-driven decisions and resource allocation. A customized Home Page streamlines navigation by displaying recent activity, key metrics, and quick links. Overall, Salesforce empowers the project with enhanced organization, accountability, and scalability, making it an effective tool for addressing food distribution challenges and supporting communities in need.