



...THE FOOD BANK BRIDGE...

(Meals Across Miles)

PROJECT TITLE: THE FOOD BANK BRIDGE

CATEGORY: SALESFORCE

SKILLS REQUIRED: SALESFORCE DEVELOPER

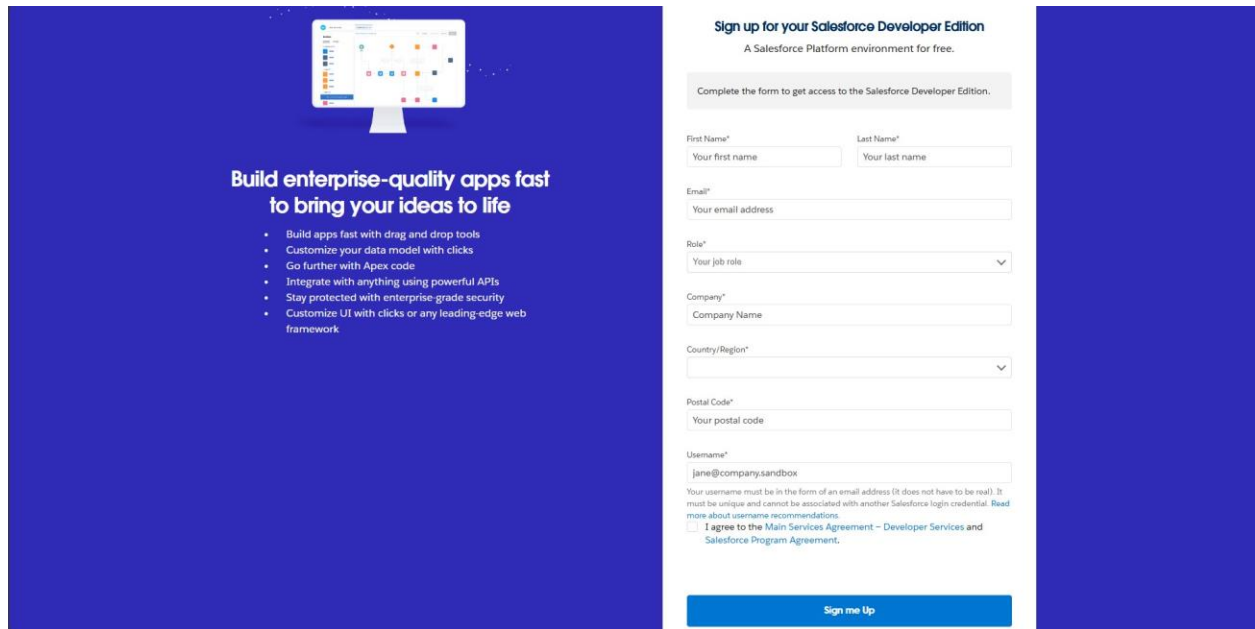
1.PROJECT OVERVIEW:

Objectives and goals-This project aims to develop a salesforce based crm application designed to manage and streamline the distribution of food to underserved communities.

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 :

First name & Last name

Email

Role : Developer

Company : College or Company Name

County : India

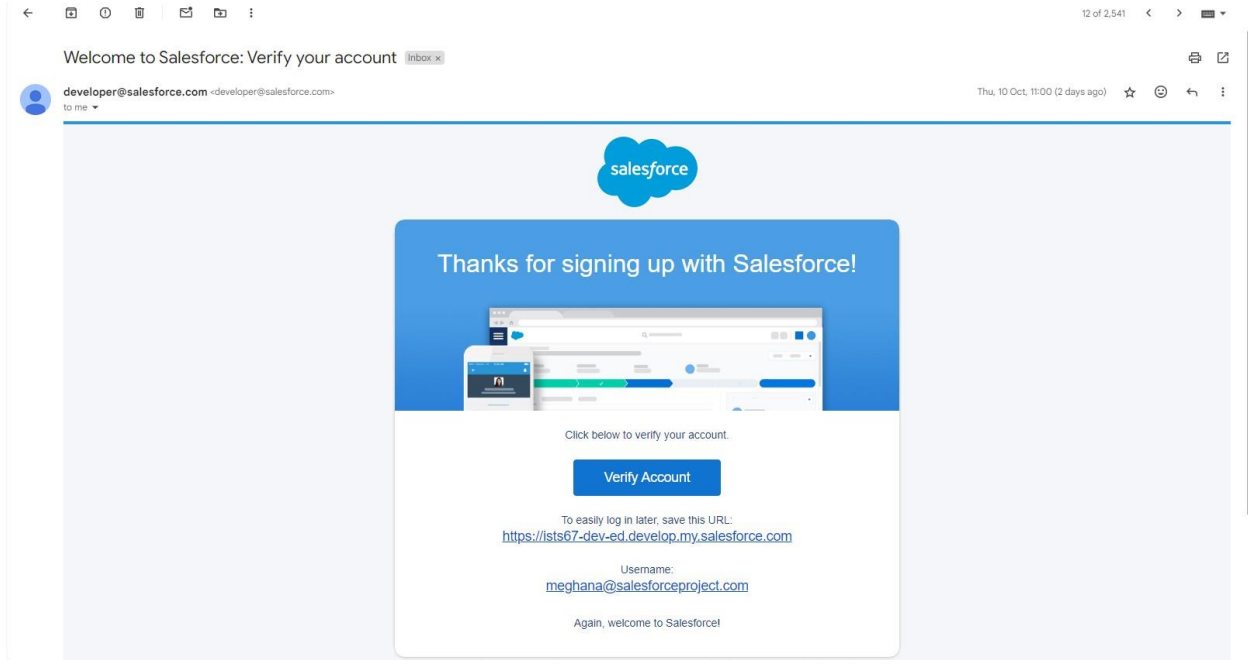
Postal Code : pin code

Username : username@organization.com

3. Click on sign me up after filling these.

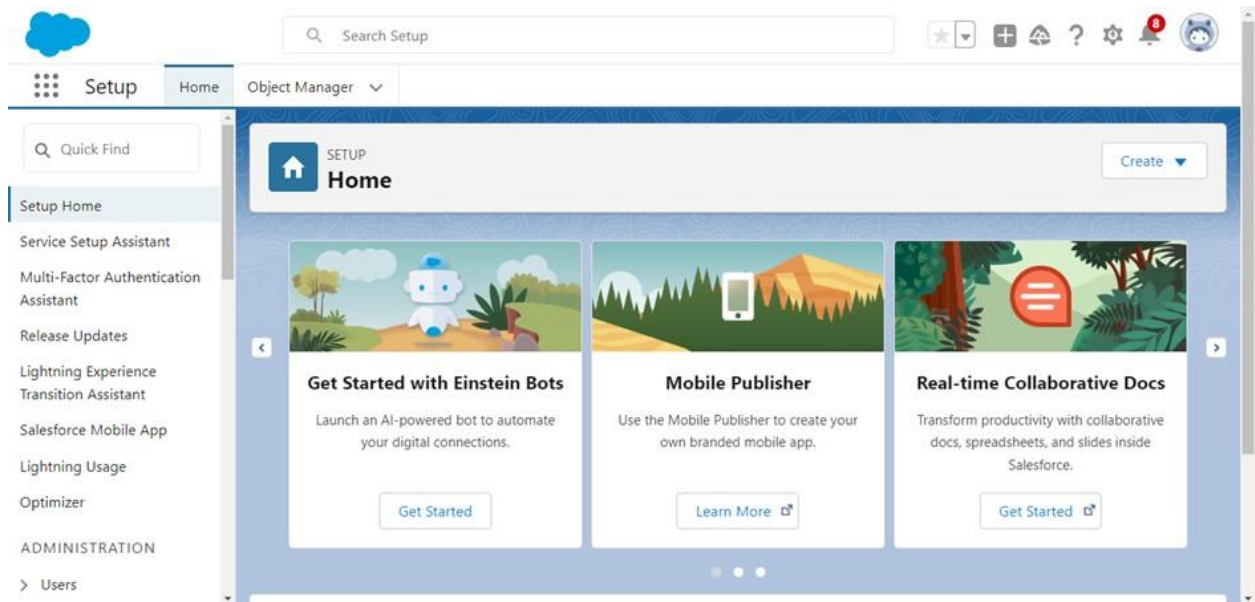
Account Activation:

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



This is a screenshot of the "Change Your Password" form in Salesforce. The form is titled "Change Your Password" and asks the user to "Enter a new password for lead@sb.oom." with the instruction "Make sure to include at least:". Below this, there are three green checkmarks indicating requirements: "8 characters", "1 letter", and "1 number". The form contains several input fields: "New Password" (with a "Good" strength indicator), "Confirm New Password" (with a "Match" indicator), "Security Question" (a dropdown menu currently showing "In what city were you born?"), and "Answer" (with the text "asdfghjkl" entered). A blue "Change Password" button is at the bottom of the form. A red rectangular box highlights the "New Password", "Confirm New Password", "Security Question", "Answer", and "Change Password" button fields.

1. Click on Verify Account
2. Give a password and answer a security question and click on change password.
3. Then you will redirect to your salesforce setup page.



Creation of objects:

CreatetheFoodDonationObject: This object tracks the food items donated to charity organizations

Log in to Salesforce.

Navigate to Setup (gear icon).

Search for "Objects" in the Quick Find box.

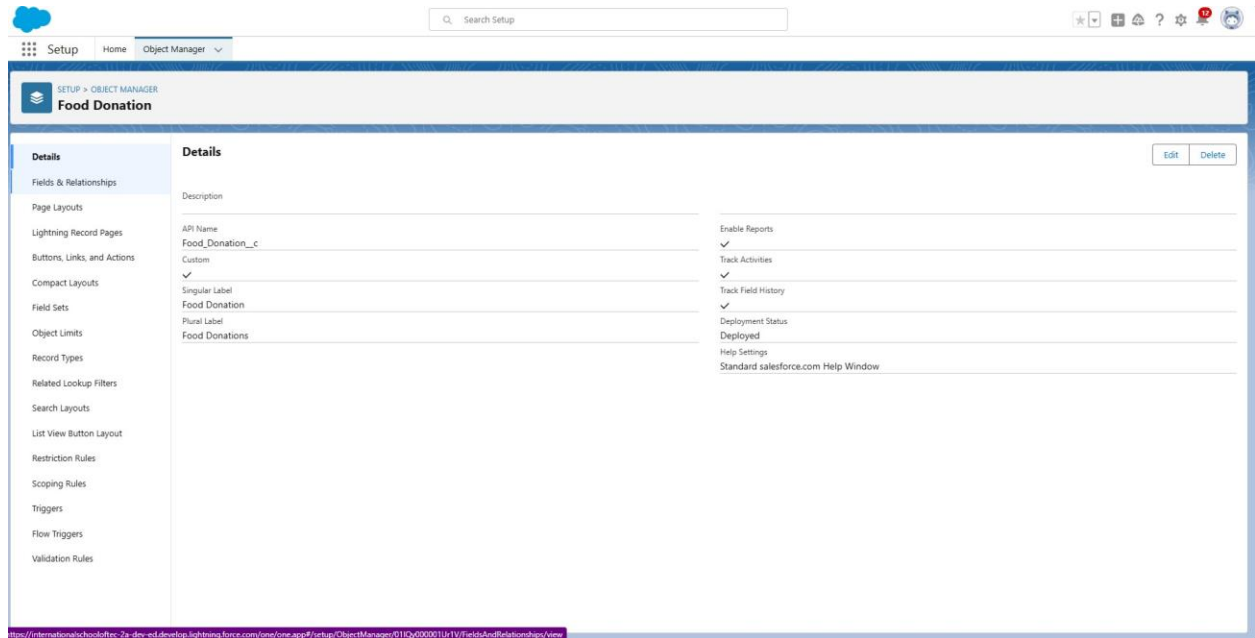
Click "Objects" under "Build".

Click "New Custom Object".

Enter "Food Donation" as the label.

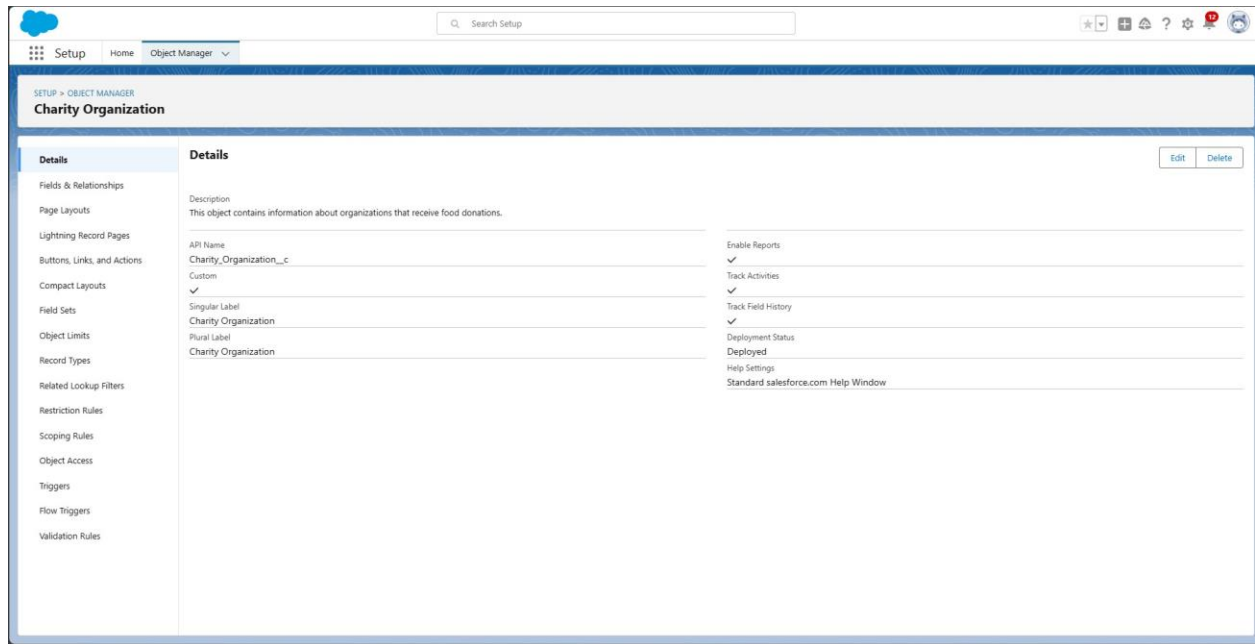
Enter "Food_Donation" as the plural label.

Click "Save".



Create the CharityOrganizationObject: This object contains information about organizations that receive food donations.

1. Log in to Salesforce.
2. Navigate to Setup (gear icon).
3. Search for "Objects" in the Quick Find box.
4. Click "Objects" under "Build".
5. Click "New Custom Object".
6. Enter "Charity Organization" as the label.
7. Enter "Charity_Organization" as the plural label.
8. Click "Save".



CreateVolunteerObject:Thisobjecttracksindividualswhohelpmanagethe donations.

Navigate to Setup (gear icon).

Search for "Objects" in the Quick Find box.

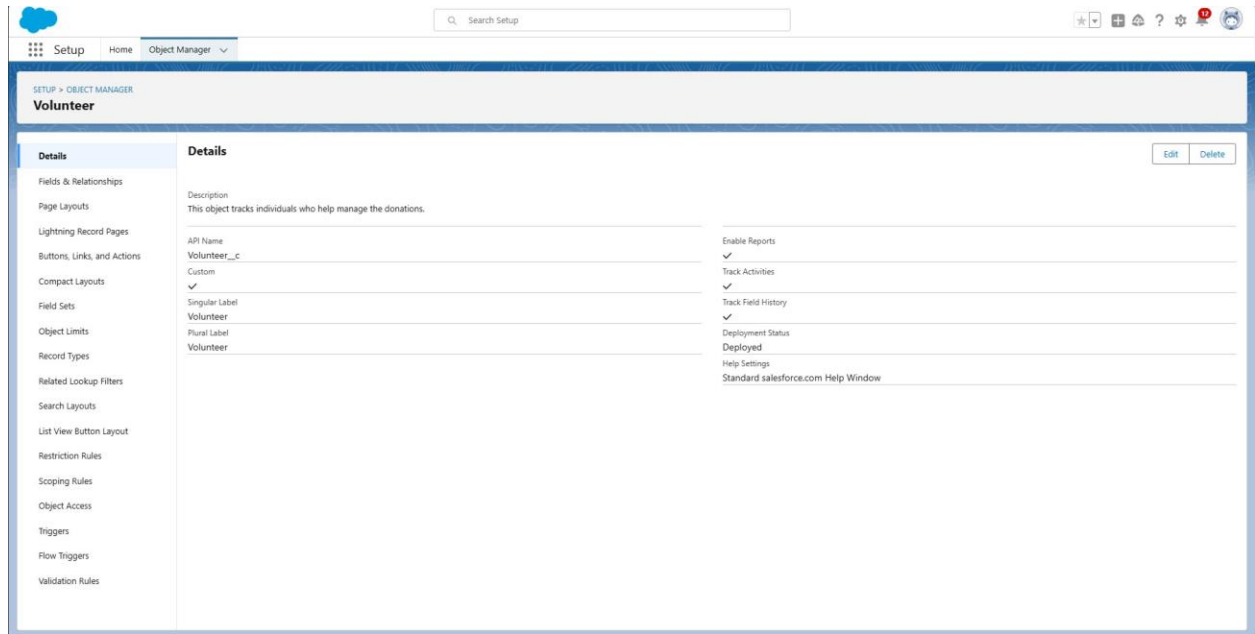
Click "Objects" under "Build".

Click "New Custom Object".

Enter "Volunteer" as the label.

Enter "Volunteers" as the plural label.

Click "Save".



Create Donation History Object: This object logs the history of donations made.

Navigate to Setup (gear icon).

Search for "Objects" in the Quick Find box.

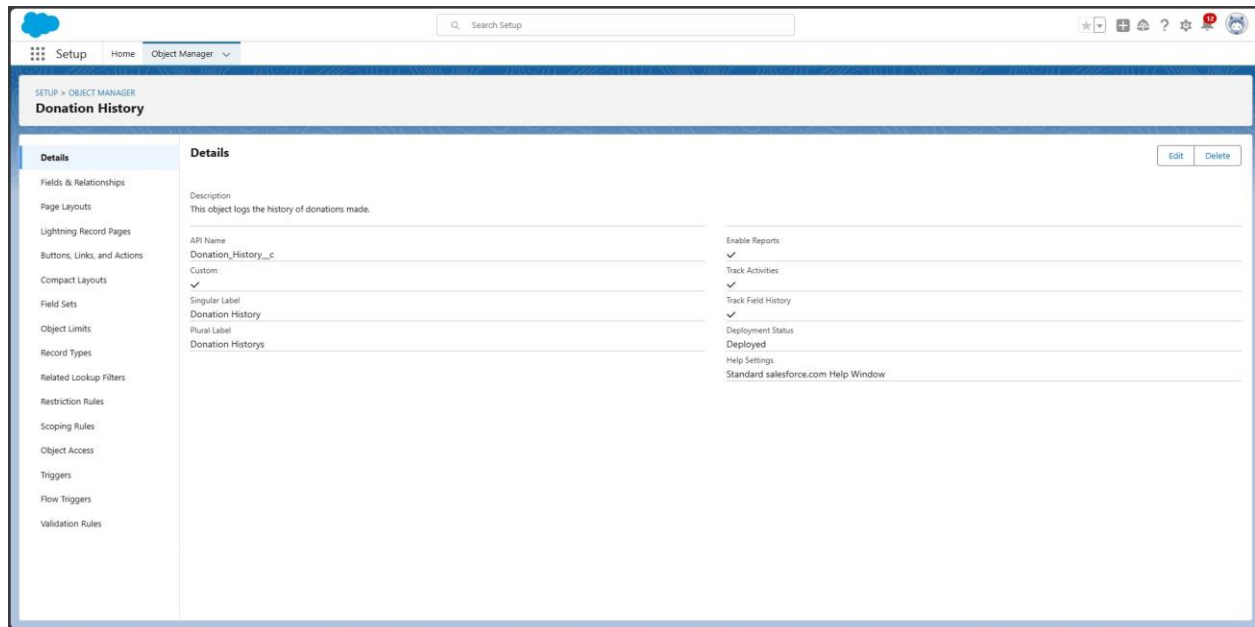
Click "Objects" under "Build".

Click "New Custom Object".

Enter "Donation History" as the label.

Enter "Donation Histories" as the plural label.

Click "Save".



CreateDonorObject: This object records information about individuals or businesses donating food.

Navigate to Setup (gear icon).

Search for "Objects" in the Quick Find box.

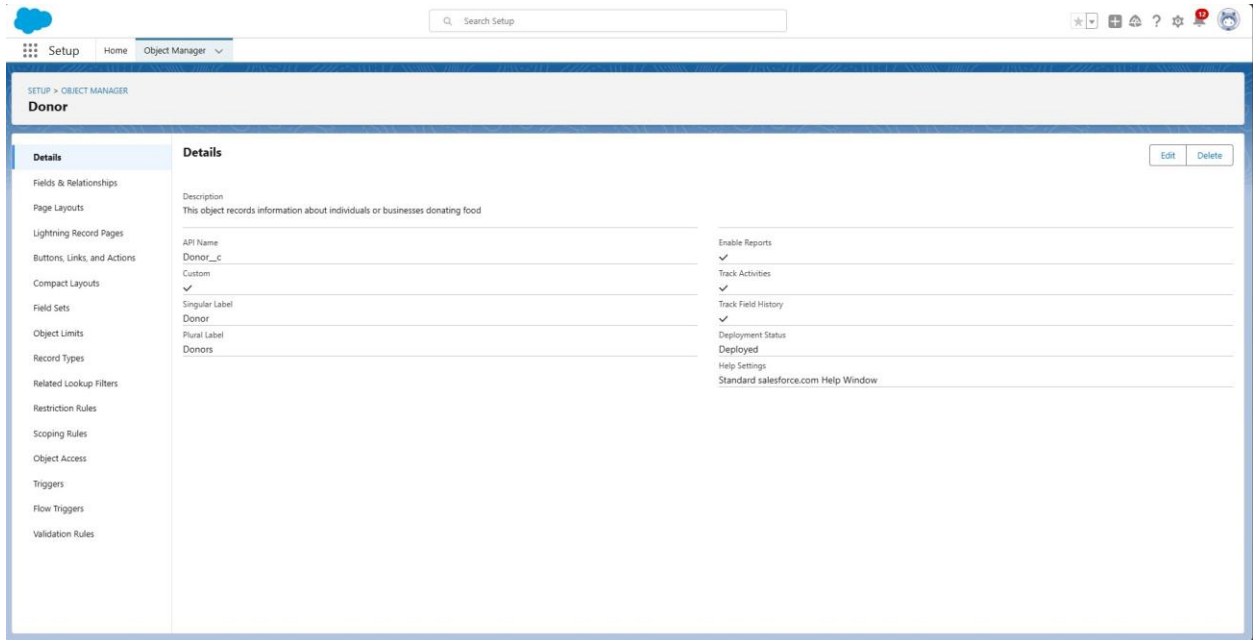
Click "Objects" under "Build".

Click "New Custom Object".

Enter "Donor" as the label.

Enter "Donors" as the plural label.

Click "Save".



Creation of fields:

Creation of fields to Food Donation Object:

1. Name: The name of the food item.

1. Click "Fields" under Food Donation.
2. Click "New Field".
3. Select "Text" as the data type.
4. Enter "Name" as the field label.
5. Make it required.
6. Click "Save".

2. Type: Specifies the category of food.

1. Click "New Field".
2. Select "Picklist" as the data type.
3. Enter "Type" as the field label.
4. Add values: Perishable, Non-Perishable, Semi-Perishable.

5. Make it required.
6. Click "Save".

3. Quantity: The amount of food donated.

1. Click "New Field".
2. Select "Number" as the data type.
3. Enter "Quantity" as the field label.
4. Make it required.
5. Click "Save".

4. Expiration Date: The date by which the food should be consumed.

1. Click "New Field".
2. Select "Date" as the data type.
3. Enter "Expiration Date" as the field label.
4. Make it required.
5. Click "Save".

5. Charity Organization: Links to the Charity Organization object.

1. Click "New Field".
2. Select "Lookup" as the data type.
3. Enter "Charity Organization" as the field label.
4. Select "Charity Organization" as the related object.
5. Make it required.
6. Click "Save".

6. Status: The current status of the donation.

1. Click "New Field".
2. Select "Picklist" as the data type.
3. Enter "Status" as the field label.
4. Add values: Pending, Approved, Rejected.
5. Make it required.
6. Click "Save".

7. Created Date:Timestamp of when the donation was created.

1. Click "New Field".
2. Select "DateTime" as the data type.
3. Enter "Created Date" as the field label.
4. Select "Auto-populated" and "Read-only".
5. Click "Save".

8. Last Modified Date:Timestamp of the last update.

1. Click "New Field".
2. Select "DateTime" as the data type.
3. Enter "Last Modified Date" as the field label.
4. Select "Auto-populated" and "Read-only".
5. Click "Save".

SETUP > OBJECT MANAGER

Food Donation

Details | **Fields & Relationships** | 13 Items, Sorted by Field Label | Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Charity Organization	Charity_Organization__c	Lookup(Charity Organization)		✓
Created By	CreatedById	Lookup(User)		
Created Date	Created_Date__c	Date/Time		
Expiration Date	Expiration_Date__c	Date		
Food Donation Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Last Modified Date	Last_Modified_Date__c	Date/Time		
Name	Name__c	Text(50)		
Owner	OwnerId	Lookup(User/Group)		✓
Quantity	Quantity__c	Number(18, 0)		
Record Type	RecordTypeId	Record Type		✓
Status	Status__c	Picklist		
Type	Type__c	Picklist		

Creation of field to Charity Organization Object:

1. Name: The name of the charity organization.

1. Click "Fields" under Charity Organization.
2. Click "New Field".
3. Select "Text" as the data type.
4. Enter "Name" as the field label.
5. Make it required.
6. Click "Save".

2. Contact Information:How to contact the organization.

1. Click "New Field".
2. Select "Phone" as the data type.
3. Enter "Phone" as the field label.
4. Click "Save".

5. Click "New Field".
6. Select "Email" as the data type.
7. Enter "Email" as the field label.
8. Click "Save".

3. Capacity: Maximum capacity for receiving donations.

1. Click "New Field".
2. Select "Number" as the data type.
3. Enter "Capacity" as the field label.
4. Click "Save".

4. Total Donations Received: A summary of all donations received by this organization.

1. Click "New Field".
2. Select "Number as the data type.
3. Enter "Total Donations Received" as the field label.
4. Click "Save".

****Write an **ApexTrigger** to Update Total Donations:

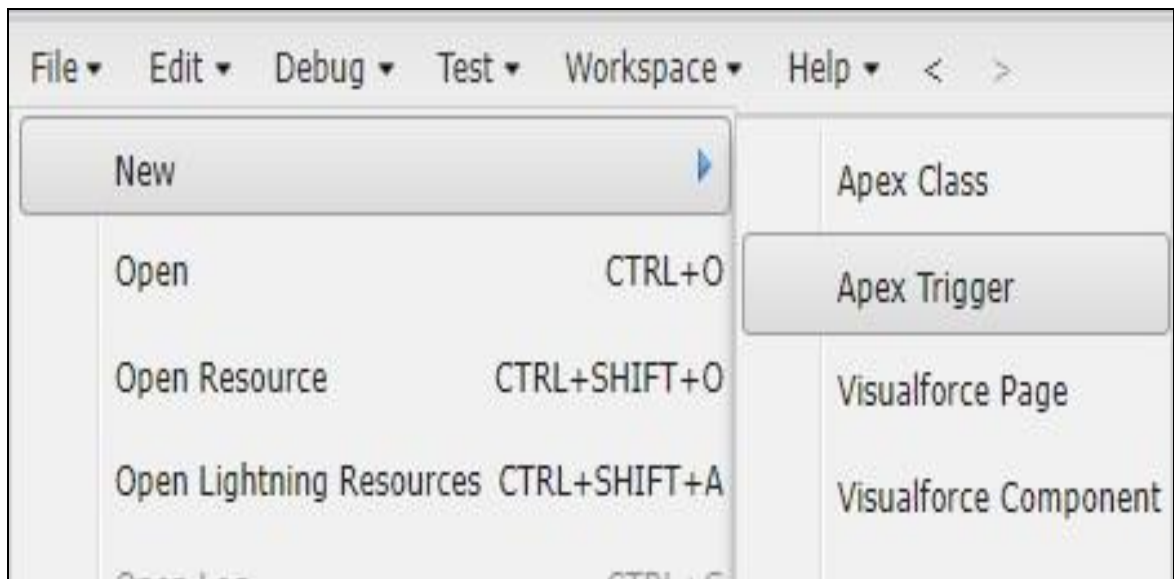
Navigate to Developer Console.

Create a new Apex Trigger on Food Donation Object:

1.click on file -> new -> Apex Trigger

2. label:UpdateTotalDonations

Object:Food Donation

A screenshot of the 'New Apex Trigger' dialog box. It has a title bar with a close button. Inside, there are two input fields: 'Name:' with a text box, and 'sObject:' with a dropdown menu. At the bottom right, there is a 'Submit' button.

3. Submit and write the code trigger UpdateTotalDonations on Food_Donation__c (after insert, after update, after delete) {

```
Set<Id> charityOrgIds = new Set<Id>();
```

```
// Collect Charity Organization Ids from inserted/updated/deleted Food  
Donation records if (Trigger.isInsert || Trigger.isUpdate) {
```

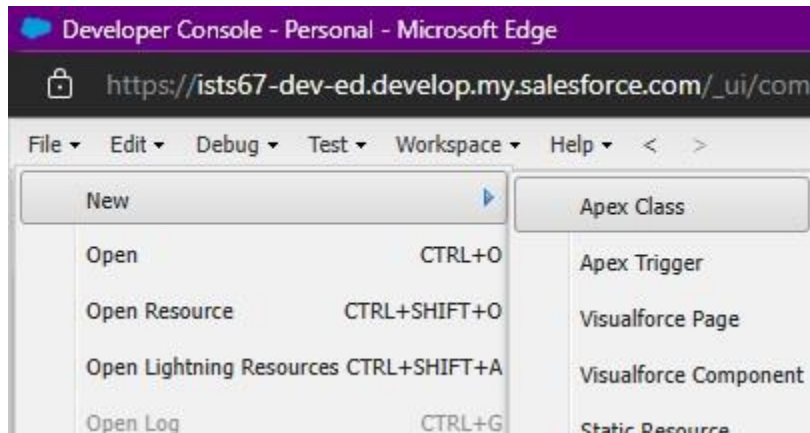
```
    for (Food_Donation__c donation : Trigger.new) {  
        charityOrgIds.add(donation.Charity_Organization__c);  
    }  
}
```

```
if (Trigger.isDelete) {  
    for (Food_Donation__c donation : Trigger.old) {  
        charityOrgIds.add(donation.Charity_Organization__c);  
    }  
}
```

```
// Aggregate Donations and update Charity Organizations  
List<Charity_Organization_c> charitiesToUpdate = new  
List<Charity_Organization_c>();  
for (Id charityId : charityOrgIds)  
{  
    AggregateResult[] results = [SELECT SUM(Quantity_c) totalDonations FROM  
Food_Donationc WHERE Charity_Organization_c = :charityId];  
    Charity_Organization_c charity = new Charity_Organization_c(  
        Id = charityId,  
        Total_Donations_Received__c = (Decimal) (results[0].get('totalDonations') !=  
null ? results[0].get('totalDonations') : 0)  
    );  
    charitiesToUpdate.add(charity);  
}  
update charitiesToUpdate;  
}
```

Test the trigger:

1. click on file -> new -> Apex Class



Label it as UpdateTotalDonationsTriggerTest and click on ok.

```
Code: @isTest public class
UpdateTotalDonationsTriggerTest {
    @isTest static void testInsertFoodDonation() {
        // Create a Charity Organization record
        Charity_Organization__c charity = new Charity_Organization__c(
            Name = 'Charity Test',
            Capacity__c = 100,
            Total_Donations_Received__c = 0
        );
        insert charity;

        // Create a Food Donation record
        Food_Donation__c donation = new Food_Donation__c(
            Name = 'Donation Test',
            Type__c = 'Perishable',
```

```

        Quantity__c = 10,
        Expiration_Date__c = Date.today().addDays(10),
        Charity_Organization__c = charity.Id,
        Status__c = 'Pending'
    );
    insert donation;

    charity = [SELECT Id, Total_Donations_Received__c FROM
Charity_Organization__c WHERE Id = :charity.Id];
    System.assertEquals(10, charity.Total_Donations_Received__c);
}

@isTest static void testUpdateFoodDonation() {
    // Create a Charity Organization record
    Charity_Organization__c charity = new Charity_Organization__c(
        Name = 'Charity Test',
        Capacity__c = 100,
        Total_Donations_Received__c = 0
    );
    insert charity;

    Food_Donation__c donation = new Food_Donation__c(
        Name = 'Donation Test',
        Type__c = 'Perishable',
        Quantity__c = 10,
        Expiration_Date__c = Date.today().addDays(10),
        Charity_Organization__c = charity.Id,
        Status__c = 'Pending'
    );
    insert donation;

    donation.Quantity__c = 20;
    update donation;

    charity = [SELECT Id, Total_Donations_Received__c FROM

```



```
Charity_Organization_c WHERE Id = :charity.Id];  
    System.assertEquals(20, charity.Total_Donations_Received__c);  
}
```

```

@isTest static void testDeleteFoodDonation() {
    Charity_Organization__c charity = new Charity_Organization__c(
        Name = 'Charity Test',
        Capacity__c = 100,
        Total_Donations_Received__c = 0
    );
    insert charity;

    Food_Donation__c donation = new Food_Donation__c(
        Name = 'Donation Test',
        Type__c = 'Perishable',
        Quantity__c = 10,
        Expiration_Date__c = Date.today().addDays(10),
        Charity_Organization__c = charity.Id,
        Status__c = 'Pending'
    );
    insert donation;

    delete donation;

    charity = [SELECT Id, Total_Donations_Received__c FROM
Charity_Organization__c WHERE Id = :charity.Id];
    System.assertEquals(0, charity.Total_Donations_Received__c);
}
}

```

Run the Test Class:

In Developer Console, go to Test -> New Run.

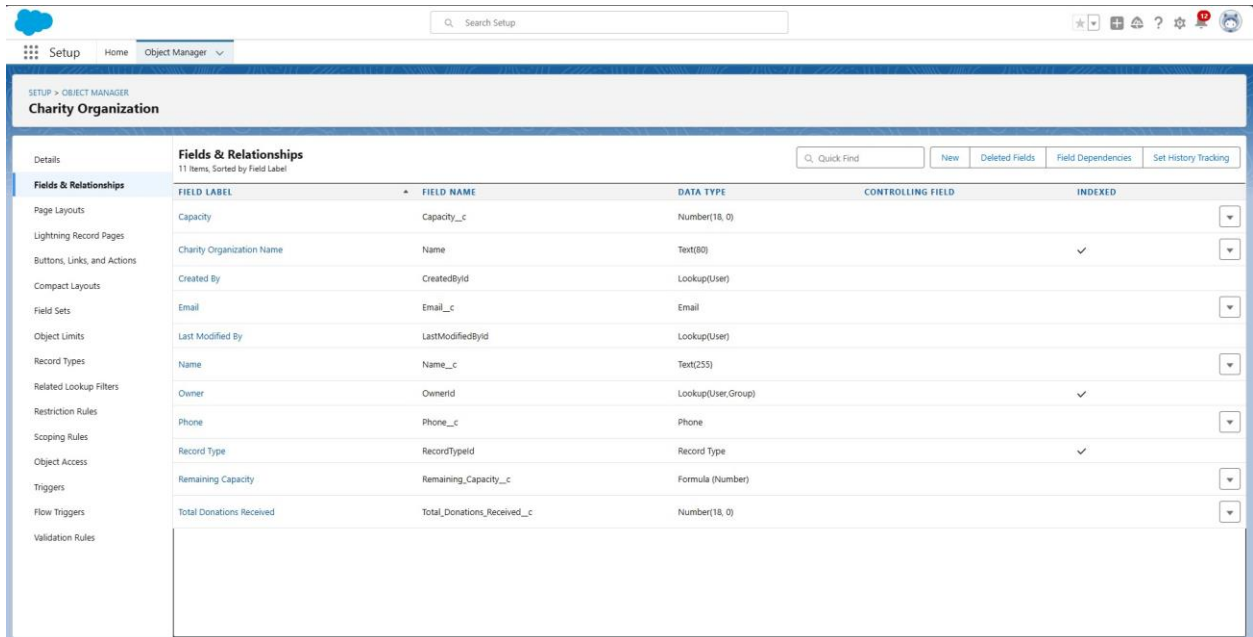
Select UpdateTotalDonationsTriggerTest and click Run.

5. Remaining Capacity: Calculated field that shows remaining capacity.

1. Click "New Field" Under Charity Organization.

Select

2. Select "Formula" as the data type.
3. Enter "Remaining Capacity" as the field label.
4. "Number" as the formula return type.
5. Enter the formula: Capacity - Total_Donations_Received__c 6.check syntax
- 7.Click "Save".



The screenshot shows the Salesforce Setup interface for the 'Charity Organization' object. The 'Fields & Relationships' tab is selected, displaying a list of 11 fields. The fields are sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Capacity	Capacity__c	Number(18, 0)		
Charity Organization Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(255)		
Owner	OwnerId	Lookup(User, Group)		✓
Phone	Phone__c	Phone		
Record Type	RecordTypeId	Record Type		✓
Remaining Capacity	Remaining_Capacity__c	Formula (Number)		
Total Donations Received	Total_Donations_Received__c	Number(18, 0)		

Creation of Fields to Volunteer Object:

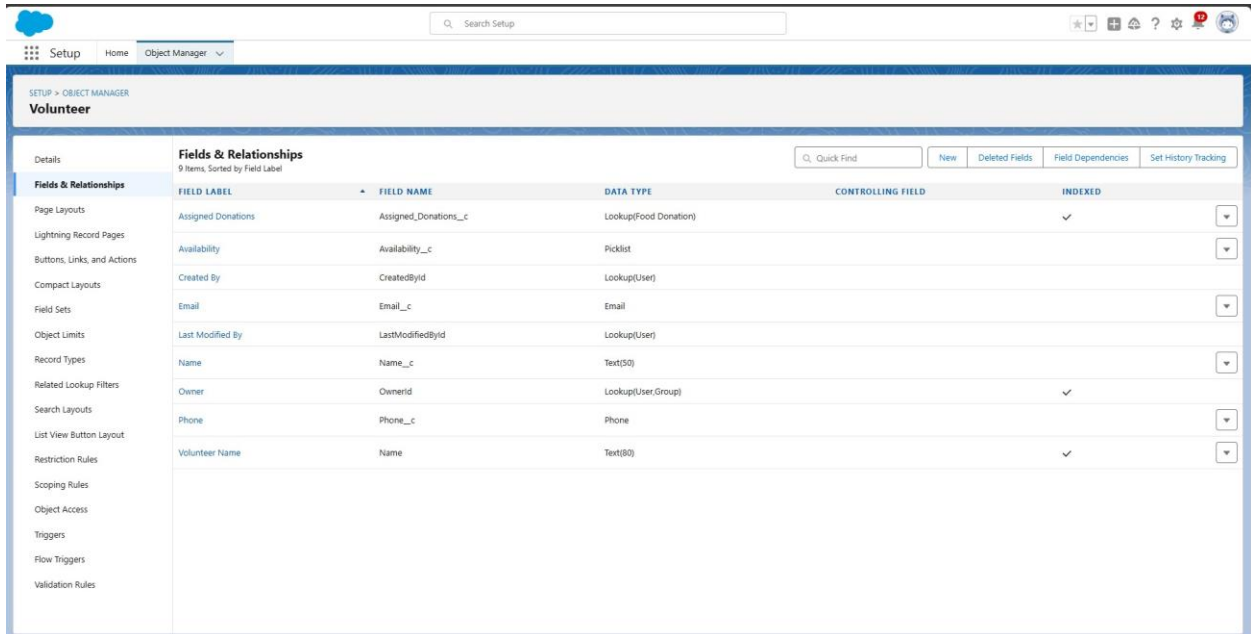
1. Name :The volunteer's name.
 1. Click "Fields" under Volunteer.
 2. Click "New Field".
 3. Select "Text" as the data type.
 4. Enter "Name" as the field label.
 5. Make it required.
 6. Click "Save".
2. Contact Information:Contact details for the volunteer.
 1. Click "New Field".

2. Select "Phone" as the data type.
3. Enter "Phone" as the field label.
4. Click "Save".
5. Repeat for Email.
3. Availability :Times when the volunteer is available.

1. Click "New Field".
2. Select "Picklist" as the data type.
3. Enter "Availability" as the field label.
4. Add values: Morning, Afternoon, Evening.
5. Click "Save".

4. Assigned Donations : Links to Food Donation for tracking assigned tasks.

1. Click "New Field".
2. Select "Lookup" as the data type.
3. Enter "Assigned Donations" as the field label.
4. Select "Food Donation" as the related object.
5. Click "Save".



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Assigned Donations	Assigned_Donations__c	Lookup(Food Donation)		✓
Availability	Availability__c	Picklist		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(50)		
Owner	OwnerId	Lookup(User, Group)		✓
Phone	Phone__c	Phone		
Volunteer Name	Name	Text(80)		✓

Creation of Field to Donation History Object:

1. Donation Date :The date when the donation was made.

Select

1. Click "Fields" under Donation History.
2. Click "New Field".
3. "Date" as the data type.
4. Enter "Donation Date" as the field label.
5. Make it required.
6. Click "Save".

2. Donation Quantity : The amount of food donated.

1. Click "New Field".
2. Select "Number" as the data type.
3. Enter "Donation Quantity" as the field label.
4. Make it required.
5. Click "Save".

3. Donation Status :The current status of the donation.

1. Click "New Field".
2. Select "Picklist" as the data type.
3. Enter "Donation Status" as the field label.
4. Add values: Delivered, Pending, Failed.
5. Click "Save".

4. Related Food Donation :Links back to the Food Donation object.

1. Click "New Field".
2. Select "Lookup" as the data type.
3. Enter "Related Food Donation" as the field label.
4. Select "Food Donation" as the related object.
5. Click "Save".

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Donation Date	Donation_Date__c	Date		
Donation History Name	Name	Text(80)		✓
Donation Quantity	Donation_Quantity__c	Number(18, 0)		
Donation Status	Donation_Status__c	Picklist		
Donor	Donor__c	Lookup(Donor)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
Related Food Donation	Related_Food_Donation__c	Lookup(Food Donation)		✓

Creation of Fields to Donor Object:

1. Name : The name of the donor.

1. Click "Fields" under Donor.
2. Click "New Field".
3. Select "Text" as the data type.
4. Enter "Name" as the field label.
5. Make it required.
6. Click "Save".

2. Contact Information: How to contact the donor.

1. Click "New Field".
2. Select "Phone" as the data type.
3. Enter "Phone" as the field label.
4. Click "Save".
5. Repeat for Email.

3. Donation History: Links to past donation records.

1. Click "New Field".
2. Select "Lookup" as the data type.

Select

3. Enter "Donation History" as the field label.
4. "Donation History" as the related object.
5. Click "Save".

4. Total Donations :

1. Click "New Field".
2. Select "Number" as the data type.
3. Enter "Total Donations" as the field label.
4. Click "Save".

SETUP > OBJECT MANAGER

Donor

Details	Fields & Relationships 9 Items, Sorted by Field Label				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)		
Lightning Record Pages	Donation History	Donation_History__c	Lookup(Donation History)		✓
Buttons, Links, and Actions	Donor Name	Name	Text(80)		✓
Compact Layouts	Email	Email__c	Email		
Field Sets	Last Modified By	LastModifiedById	Lookup(User)		
Object Limits	Name	Name__c	Text(50)		
Record Types	Owner	OwnerId	Lookup(User,Group)		✓
Related Lookup Filters	Phone	Phone__c	Phone		
Restriction Rules	Total Donations	Total_Donations_del__c	Number(18, 0)		
Scoping Rules					
Object Access					
Triggers					
Flow Triggers					
Validation Rules					

Creation of Tabs:

1. Navigate to the Setup Menu:

Go to Setup in Salesforce.

2. Search for Tabs:

In the Quick Find box, type Tabs and select Tabs under User Interface.

3. Create a New Tab for Each Object:

Step 1: Food Donation

Click New in the Custom Object Tabs section.

Select

Select Food Donation as the object.

Choose a Tab Style (icon) for the tab.

Click Next and then Save.

Step 2: Charity Organization Click New in the Custom
Object Tabs section.

Select Charity Organization as the object.

Choose a Tab Style (icon) for the tab.

Click Next and then Save.

****Step 3: Volunteer**

Click New in the Custom Object Tabs section.

Select Volunteer as the object.

Choose a Tab Style (icon) for the tab.

Click Next and then Save.

****Step 4: Donation History Click New in the Custom
Object Tabs section.**

Select Donation History as the object.

Choose a Tab Style (icon) for the tab.

Click Next and then Save.

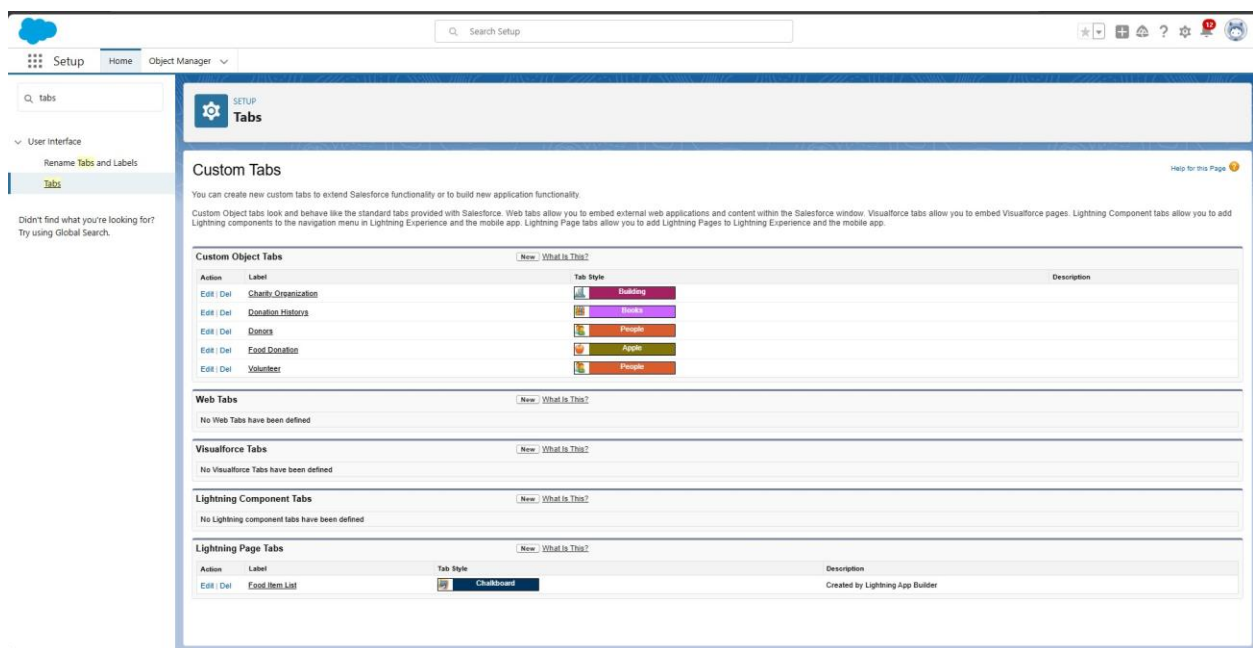
****Step 5: Donor**

Click New in the Custom Object Tabs section.

Select Donor as the object.

Choose a Tab Style (icon) for the tab.

Click Next and then Save.



Creation of Record Types:

[RecordTypesandPageLayoutsconfiguration:](#)

Food Donation:

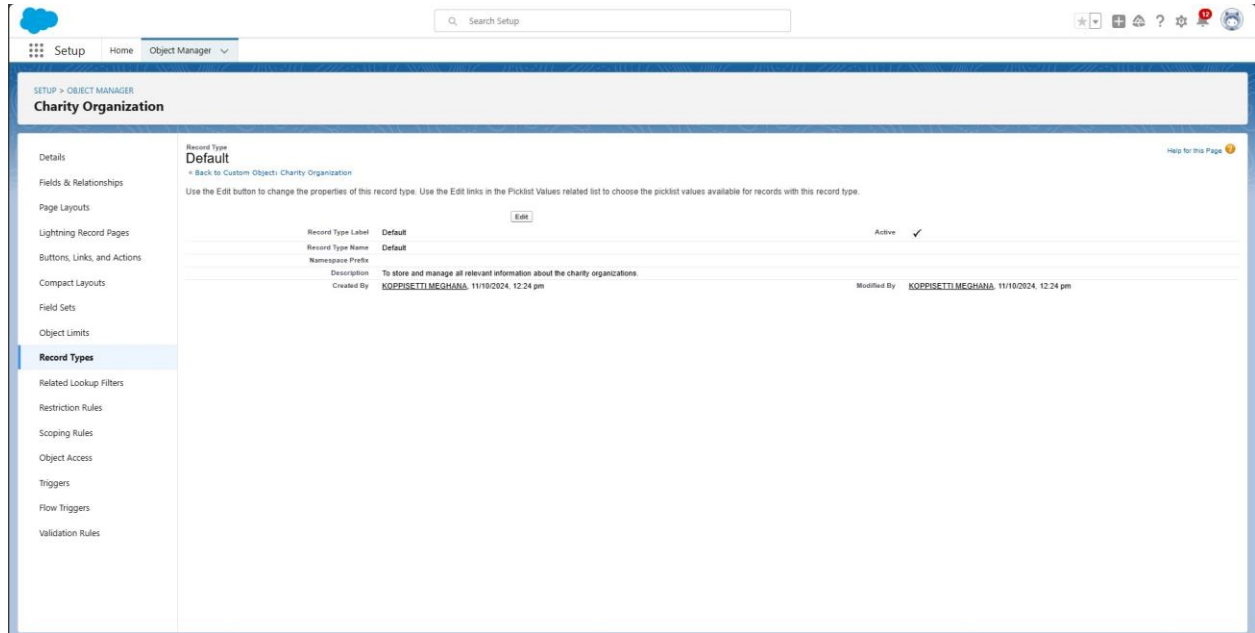
1. Go to Setup.
2. Search for "Record Types" in the Quick Find box.
3. Select "Record Types" under "Build".
4. Choose "Food Donation" object.
5. Create/Edit Record Type:
 - Label: Default (General Donation) - Description: General donation record type
6. Go to Page Layouts.
7. Select "Food Donation" object.
8. Edit Page Layout:
 - Add all fields - Add related lists:
 - Charity Organization
 - Volunteers

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. A search bar is present. The main content area is titled 'Food Donation' and shows the 'Record Type' configuration for 'General Donation'. The 'Record Type Label' is 'General Donation' and the 'Record Type Name' is 'General_Donation'. The 'Description' is 'To handle general donations of food items.' The 'Created By' is 'KOPPISETTI MEGHANA' and the 'Modified By' is 'KOPPISETTI MEGHANA' on 11/10/2024 at 12:12 pm. There is an 'Edit' button. Below this, there's a table titled 'Picklists Available for Editing' with columns 'Action', 'Field', and 'Modified Date'. The table contains two rows: 'Edit Status' and 'Edit Type', both modified on 11/10/2024 at 12:12 pm.

Charity Organization

1. Go to Setup.
2. Search for "Record Types" in the Quick Find box.
3. Select "Record Types" under "Build".
4. Choose "Charity Organization" object.
5. Create/Edit Record Type:
 - Label: Default

- Description: Default charity organization record type
6. Go to Page Layouts.
 7. Select "Charity Organization" object.
 8. Edit Page Layout:
 - Add all contact details - Add all capacity details - Add related lists:
 - Food Donations



Creation of validation rules:

CreateValidationRuleorFoodDonationobject:

1. Log in to Salesforce.
2. Click the gear icon (⚙) and select Setup.
3. Search for "Validation Rules" in the Quick Find box.
4. Click "Validation Rules" under "Build".
5. Click "New Validation Rule".
6. Select "Food Donation" as the object.

Rule Details

1. Label: "Food Donation Quantity Validation".
2. Description: "Ensure Food Donation Quantity is greater than 0".

3. Error Message: "Food Donation Quantity must be greater than 0".

Rule Criteria

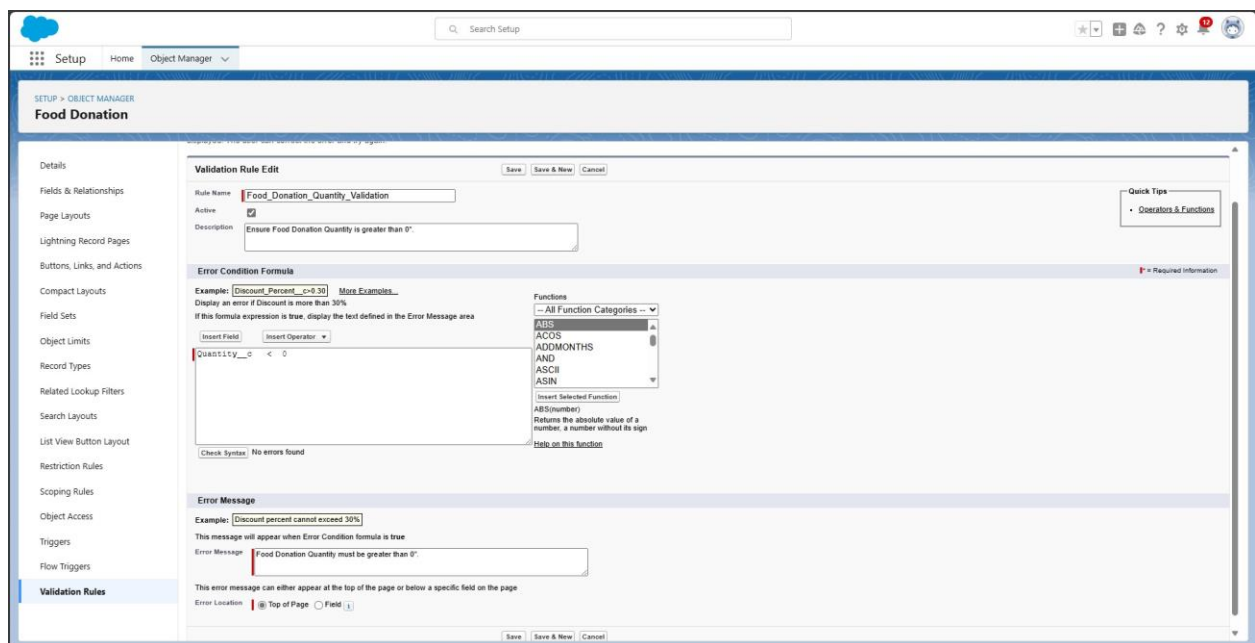
1. Field: Food Donation Quantity.
2. Operator: Less Than.
3. Value: 0.

Rule Formula

Quantity__c < 0

Save and Activate

1. Click Save.
2. Activate the rule.



Creation of Record pages:

Navigate to Lightning App Builder:

Go to Setup.

In the Quick Find box, type Lightning App Builder and select it.

2. Create New Record Page:

Click New → Record Page.

Select Food Donation from the list of objects.

Click Next.

3. Configure Page Details:

Name your page (e.g., Food Donation Details).

Click Next.

4. Customize the Detailed View:

4.1 Include All Necessary Fields:

Drag and Drop Record Details Component:

Drag the Record Details component onto the canvas to display all fields of the Food Donation record.

Make sure to include the following fields:

Name

Type (Picklist)

Quantity

Expiration Date

Charity Organization (Lookup)

Status (Picklist)

4.3 Include Related Lists:

Add Related Lists Component:

Drag the Related Lists component onto the canvas.

Include related records such as:

Donation History

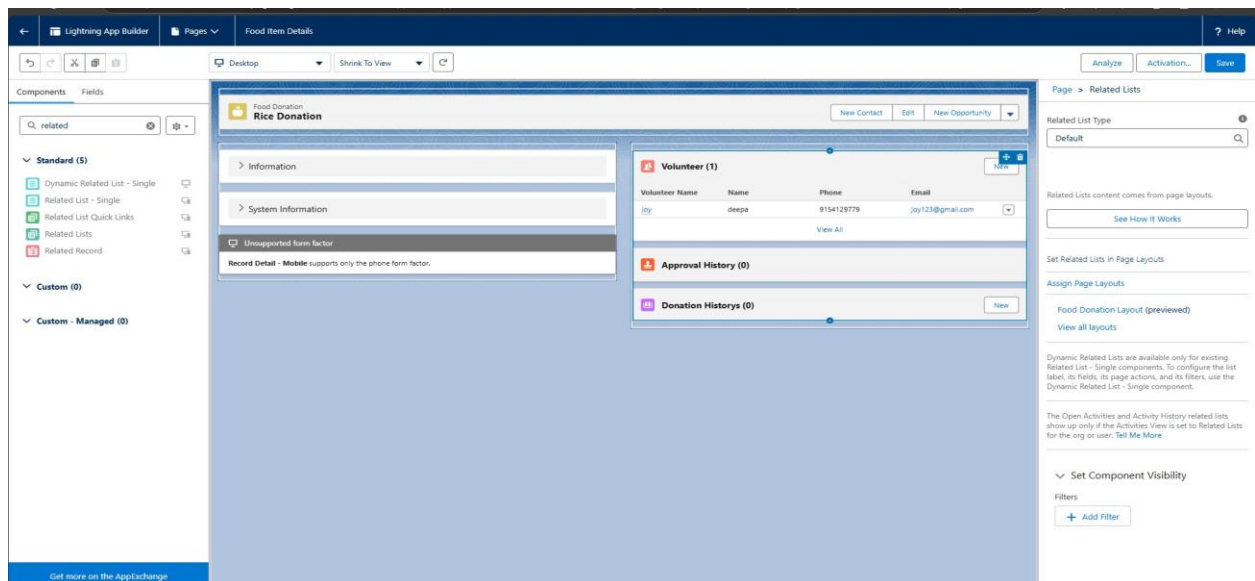
Volunteers

4.Highlights Panel:

Drag the Highlights Panel component to the top of the page for key information.

to visualize data, like donation trends over time.

5. Save and Activate:



Create New App Page:

Click New → App Page.

Select Standard List View.

Click Next.

Configure Page Details:

Name your page (e.g., Food Donation List).

Click Next.

Select Object:

Choose Food Donation from the list of objects.

Click Next.

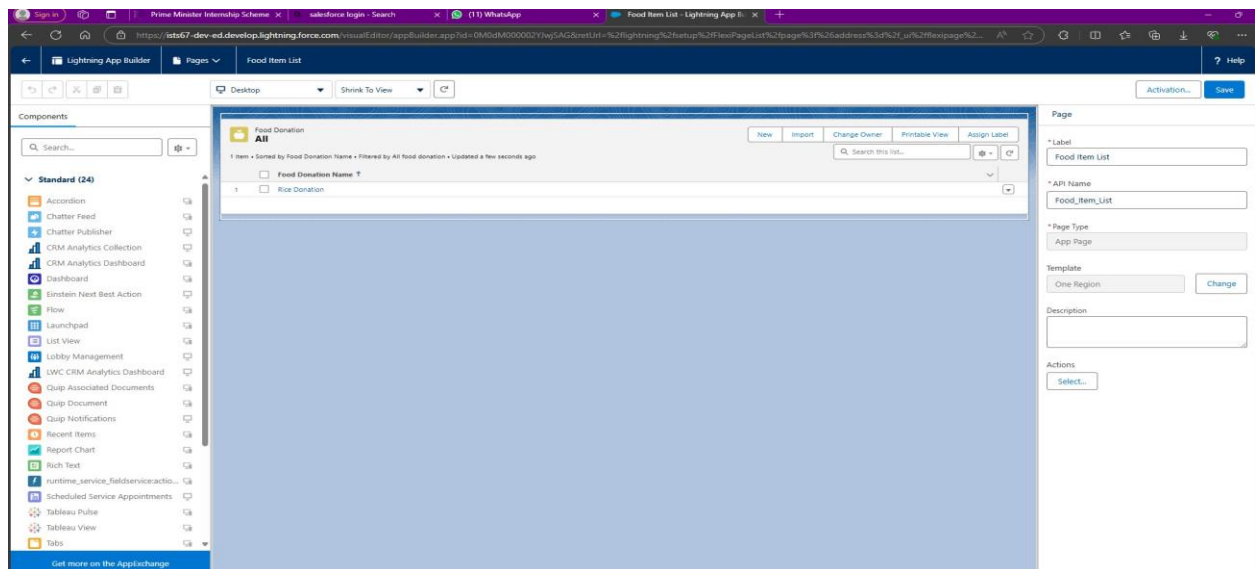
Customize the Layout:

List View:

Drag the List View component onto the canvas.

Set it to display Food Donations.

Save and Activate:



Set Up Profiles:

1. Navigate to Profiles: Go to Setup. In the Quick Find box, type Profiles and select Profiles.
2. Create New Profiles (if necessary): Clone existing profiles to create custom profiles.

Admin Profile

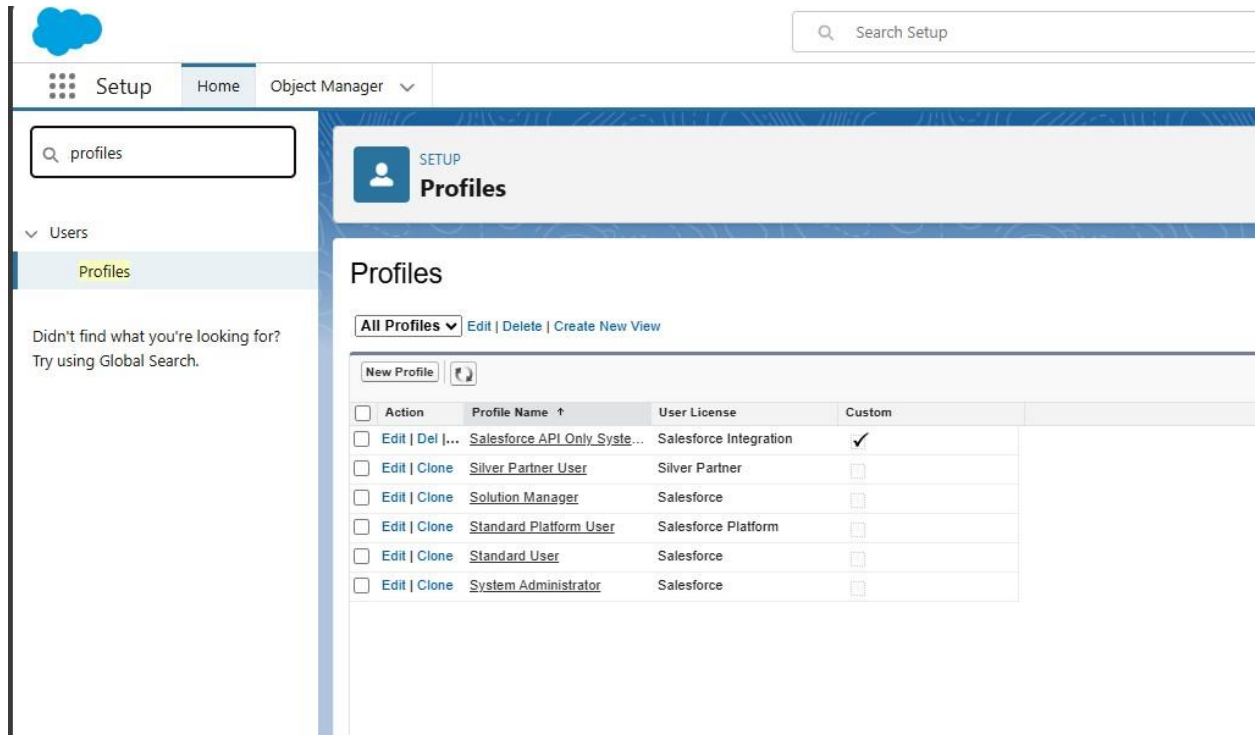
- Clone from: Standard Platform User Profile
- Name: Admin (Full Access)
- Permissions: Grant all administrative permissions

Volunteer Profile

- Clone from: Standard User Profile
- Name: Volunteer (Access to Food Donations)
- Permissions: Grant read/write access to Food Donation records

Charity Coordinator Profile

- Clone from: Standard User Profile
- Name: Charity Coordinator (Access to Charity Organizations)
- Permissions: Grant read/write access to Charity Organization records



Set Up Roles:

1. Navigate to Roles Go to Setup:

Click the gear icon (⚙) in the top-right corner and select Setup.

Search for Roles:

In the Quick Find box, type Roles and select it.

2. Create Role Hierarchy

A. Create Admin Role

Add Role: Click the Add Role button.

Enter Details:

Label: Admin

Role Name: Admin

Parent Role: Its

Save the role.

B. Create Volunteer Role

Create Users:

1. Navigate to Setup: Go to Setup in Salesforce.
2. Search for Users: In the Quick Find box, type Users and select Users.
3. Create New Users: Click New User.

User 1: Admin

- First Name: John
- Last Name: Doe
- Role: Admin
- User License: Salesforce
- Alias: jdoe
- Profile: Admin
- Email: jdoe@example1.com
- Username: jdoe@example1.com
- Nickname: JohnDoe
- Title: Administrator
- Company: Food Bank
- Department: Administration
- Division: Operations

Save

The screenshot shows the Salesforce 'User Edit' page for a user named 'John Deo'. The page is divided into two main sections: 'General Information' and 'Permissions'. The 'General Information' section contains fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Permissions' section contains fields for Role, User License, Profile, and a list of checkboxes for various user types (Marketing User, Office User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User). The 'Data.com User Type' field is set to 'None'. The 'Data.com Monthly Addition Limit' is set to '300'. The 'Accessibility Mode (Classic Only)' checkbox is checked. The 'High Contrast Palette on Charts' checkbox is checked. The 'Load Lightning Pages While Scrolling' checkbox is checked. The 'Debug Mode' checkbox is checked. The 'Send Apex Warning Emails' checkbox is checked. The 'Make Setup My Default Landing Page' checkbox is checked. The 'Quick Access Menu' checkbox is checked. The 'Development Mode' checkbox is checked. The 'Show View State in Development Mode' checkbox is checked. The 'Cache Diagnostics' checkbox is checked. The 'Required Information' icon is visible in the top right corner of the page.

Setup Home Object Manager

Q Search Setup

Q users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for?
Try using Global Search.

User Edit John Deo

User Edit Save Save & New Cancel

General Information

First Name John

Last Name Deo

Alias jdoe

Email jdoe@example1.com

Username jdoe@example1.com

Nickname JohnDoe

Title Administrator

Company Food Bank

Department Administration

Division Operations

Role Admin

User License Salesforce

Profile Admin

Active ☒

Marketing User ☐

Office User ☐

Knowledge User ☐

Flow User ☐

Service Cloud User ☐

Site.com Contributor User ☐

Site.com Publisher User ☐

WDC User ☐

Data.com User Type None

Data.com Monthly Addition Limit 300

Accessibility Mode (Classic Only) ☒

High Contrast Palette on Charts ☒

Load Lightning Pages While Scrolling ☒

Debug Mode ☒

Send Apex Warning Emails ☒

Make Setup My Default Landing Page ☒

Quick Access Menu ☒

Development Mode ☐

Show View State in Development Mode ☐

Cache Diagnostics ☐

Help for this Page

User 2: Volunteer Manager

- First Name: Jane
- Last Name: Smith
- Role: Volunteer
- User License: Salesforce Platform
- Alias: jsmith
- Profile: Standard Platform User (Access to Food Donations)
- Email: jsmith@example1.com
- Username: jsmith@example1.com
- Nickname: JaneS
- Title: Volunteer Coordinator
- Company: Food Bank
- Department: Volunteer Services
- Division: Community Engagement

Save

The screenshot shows the Salesforce Setup page for editing a user named Jane Smith. The page is divided into several sections:

- General Information:** Fields for First Name (Jane), Last Name (Smith), Alias (jsmith), Email (jsmith@example1.com), Username (jsmith@example1.com), Nickname (JaneS), Title (Volunteer Coordinator), Company (Food Bank), Department (Volunteer Services), and Division (Community Engagement).
- Role:** A dropdown menu set to "Volunteer".
- User License:** A dropdown menu set to "Salesforce Platform".
- Profile:** A dropdown menu set to "Standard Platform User".
- Active:** A checkbox that is checked.
- Marketing User:** A checkbox that is unchecked.
- Offline User:** A checkbox that is unchecked.
- Knowledge User:** A checkbox that is unchecked.
- Flow User:** A checkbox that is unchecked.
- Service Cloud User:** A checkbox that is unchecked.
- Site.com Contributor User:** A checkbox that is unchecked.
- Site.com Publisher User:** A checkbox that is unchecked.
- WDC User:** A checkbox that is unchecked.
- Data.com User Type:** A dropdown menu set to "None".
- Data.com Monthly Addition Limit:** A dropdown menu set to "300".
- Accessibility Mode (Classic Only):** A checkbox that is unchecked.
- High-Contrast Palette on Charts:** A checkbox that is unchecked.
- Load Lightning Pages While Scrolling:** A checkbox that is checked.
- Debug Mode:** A checkbox that is unchecked.
- Make Setup My Default Landing Page:** A checkbox that is unchecked.
- Salesforce CRM Content User:** A checkbox that is checked.
- Receive Salesforce CRM Content Email Alerts:** A checkbox that is checked.
- Receive Salesforce CRM Content Alerts as Daily Digest:** A checkbox that is checked.
- Allow Forecasting:** A checkbox that is unchecked.

User 3: Charity Coordinator

- First Name: Bob
- Last Name: Johnson
- Role: Charity Coordinator

- User License: Salesforce platform
- Alias: bjohnson
- Profile :Standard Platform User(Access to Charity Organizations)
- Email: bjohnson@example.com
- Username: bjohnson@example.com
- Nickname: BobJ
- Title: Charity Liaison
- Company: Food Bank
- Department: Charity Partnerships
- Division: Development

Click Save

The screenshot shows the Salesforce 'User Edit' interface for a user named Bob Johnson. The left sidebar contains navigation links for 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main content area is titled 'User Edit' and includes a 'General Information' section with fields for First Name (Bob), Last Name (Johnson), Alias (bjohnson), Email (bjohnson@example1.com), Username (bjohnson@example1.com), Nickname (BobJ), Title (Charity Liaison), Company (Food Bank), Department (Charity Partnerships), and Division (Development). To the right, there are dropdown menus for Role (Charity Coordinator), User License (Salesforce Platform), and Profile (Standard Platform User). Below these are checkboxes for various user types like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. At the bottom, there are checkboxes for 'Data.com User Type', 'Data.com Monthly Addition Limit', 'Accessibility Mode (Classic Only)', 'High-Contrast Palette on Charts', 'Load Lightning Pages While Scrolling', 'Debug Mode', 'Make Setup My Default Landing Page', 'Salesforce CRM Content User', 'Receive Salesforce CRM Content Email Alerts', 'Receive Salesforce CRM Content Alerts as Daily Digest', and 'Allow Forecasting'.

Create Permission Sets:

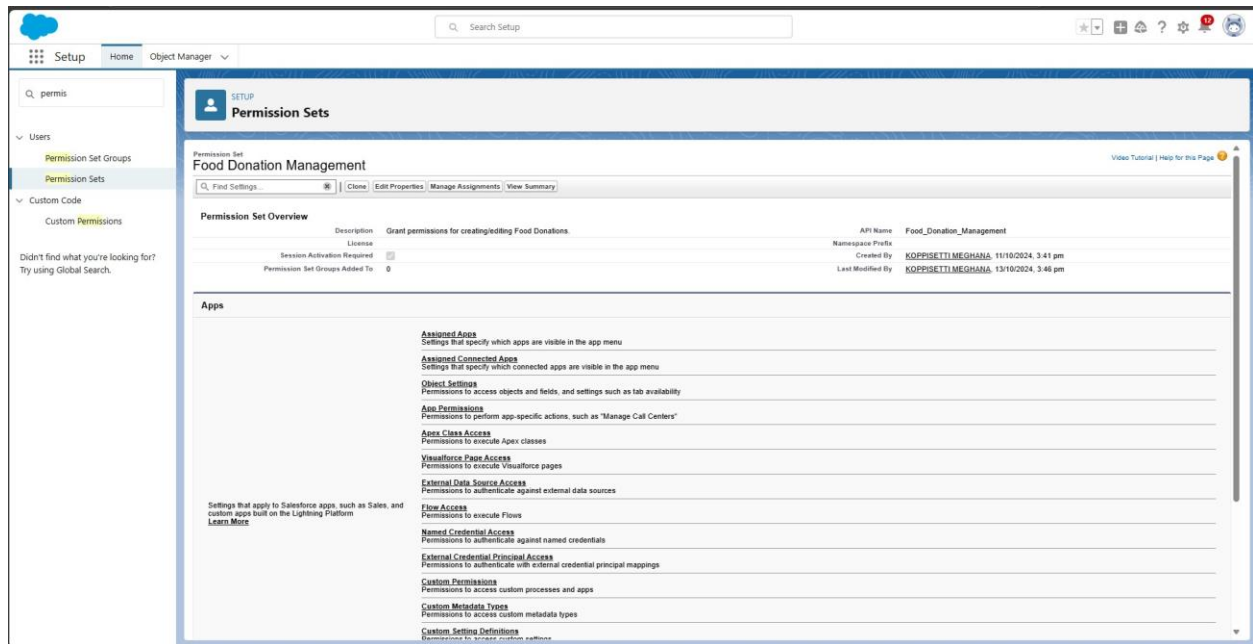
1. Navigate to Permission Sets: Go to Setup. In the Quick Find box, type Permission Sets and select Permission Sets.
2. Create New Permission Sets:

Food Donation Management Permission Set

- Name: Food Donation Management

- Permissions: Grant permissions for creating/editing Food Donations

Click Save



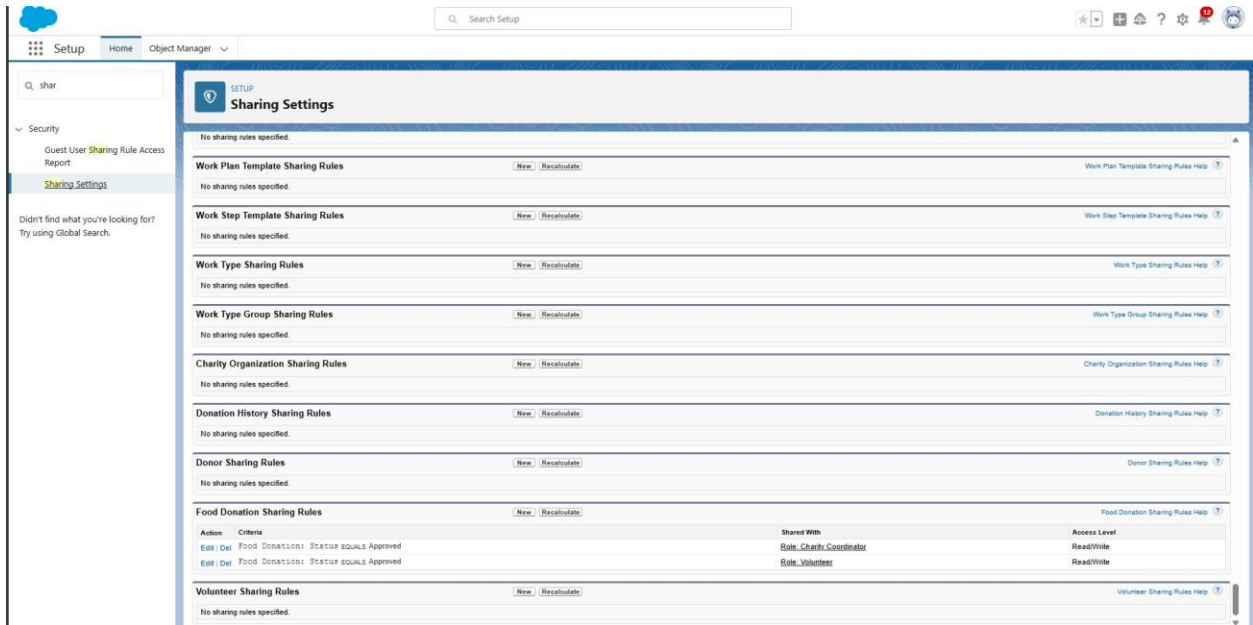
Set Up Sharing Rules

1. Navigate to Sharing Settings: Go to Setup. In the Quick Find box, type Sharing Settings and select Sharing Settings.
2. Create Sharing Rules:

Open Food Donation Sharing Rule

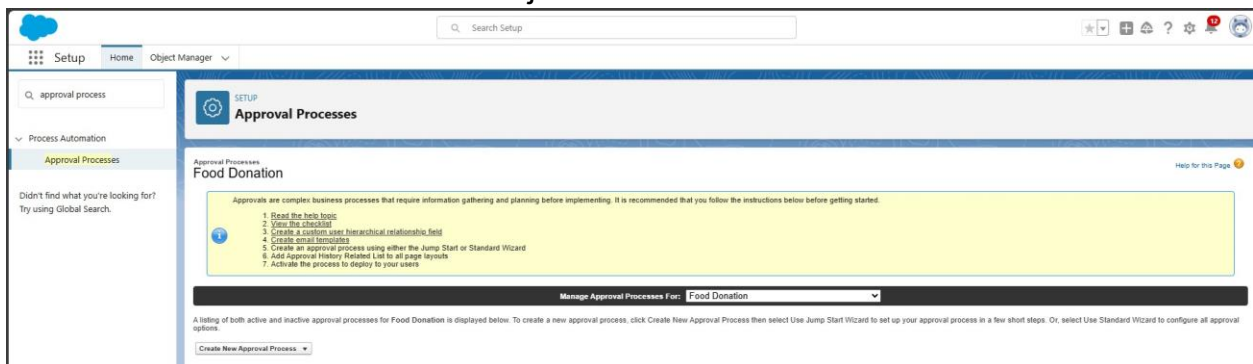
- Object: Food Donations
- Rule Type: Based on criteria
- Criteria: Status = Approved
- Shared With: Volunteer, Charity Coordinator roles

Click Save.



Create Approval Process

1. Log in to Salesforce.
2. Click the gear icon (⚙) and select Setup.
3. Search "Approval Processes" in Quick Find.
4. Click "Approval Processes".
5. Click "New Approval Process".
6. Select "Food Donation" as the object.



Approval Process Details

- Label: Food Donation Approval Process.
- API Name: Food_Donation_Approval_Process.
- Description: Approval process for Food Donations.

Define Approval Criteria

1. Click "Add Criteria".
2. Select "Field" as the criteria type.
3. Choose "Status" field.
4. Set operator to "Equals".
5. Set value to "Pending Approval".
6. Next
7. select fields to display-
 - Food DonationName
 - Owner
 - Name
 - Quantity
 - Status
8. Specify initial Submitters: and click on save

- Charity Coordinator approval.

Choose your Food Donation Approval Process.

Add Step:

In the Approval Process page, find the Steps section.

Click Add Step.

Configure Charity Coordinator Approval Step:

Step Label: Charity Coordinator Approval

Step Description: Approval by Charity Coordinator Specify Step Criteria:

Criteria Type: Field

Field: Status

Operator: Equals

Value: Pending

Select Assigned Approver:

Choose Approver: Automatically assign to approver(s)

Assigned Approver: Bob Jonson

Click Save.

Admin Approval

In the Approval Process page, find the Steps section and click Add Step.

Configure Admin Approval Step:

Step Label: Admin Approval

Step Description: Final approval by Admin

Specify Step Criteria:

Criteria Type: Field

Field: Status

Operator: Equals

Value: Pending

Select Assigned Approver:

Choose Approver: Automatically assign to approver(s)

Assigned Approver: Jhon Deo

Notification Template:

Select or create a notification template to notify the Admin.

Save the Step:

Click Save.

Step 5: Configure Approval Actions

1. Click "Add Action".
2. Action Type: Update Field.
3. Field: Status.
4. Value: Approved (or Rejected).

Step 6: Activate Approval Process

1. Click "Save".
2. Activate the approval process.

The screenshot shows the Salesforce Setup interface for the 'Food Donation Approval Process'. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the 'Approval Processes' section for the 'Food Donation Approval Process'. The process is currently 'Active' and 'Approved'. The 'Process Definition Detail' section shows the process name, unique name, description, entry criteria, record eligibility, and approval assignment email template. The 'Initial Submission Actions' section shows a table with columns for Action, Type, Name, Description, Criteria, Assigned Approver, and Repeat Behavior. The 'Approval Steps' section shows a table with columns for Step Number, Name, Description, Criteria, Assigned Approver, and Repeat Behavior. The 'Final Approval Actions' section shows a table with columns for Action, Type, Name, Description, and Repeat Behavior. The 'Final Rejection Actions' section shows a table with columns for Action, Type, Name, Description, and Repeat Behavior.

Process Definition Detail

Field	Value
Process Name	Food Donation Approval Process
Unique Name	Food_Donation_Approval_Process
Description	Food Donation: STATUS EQUALS Pending
Entry Criteria	Food Donation: STATUS EQUALS Pending
Record Eligibility	Administrator ONLY
Approval Assignment Email Template	Approval Assignment Email Template
Initial Submitters	Bob Admin, Bob, Charity Coordinator, Bob Volunteer, Food Donation Owner
Created By	KOPPISETTI MEGHANA, 11/16/2024, 4:15 pm
Modified By	KOPPISETTI MEGHANA, 13/16/2024, 4:16 pm

Initial Submission Actions

Action	Type	Description
Record Lock	Record Lock	Lock the record from being edited

Approval Steps

Step Number	Name	Description	Criteria	Assigned Approver	Repeat Behavior
1	Initial Approval	Initial approval by Volunteer	Food Donation: STATUS EQUALS Pending, else Approve	Manually Chosen	Final Rejection
2	Charity Coordinator Approval	Approval by Charity Coordinator	Food Donation: STATUS EQUALS Pending	User: Bob Johnson	Final Rejection
3	Admin Approval	Final approval by Admin	Food Donation: STATUS EQUALS Pending	User: John Deo	Final Rejection

Final Approval Actions

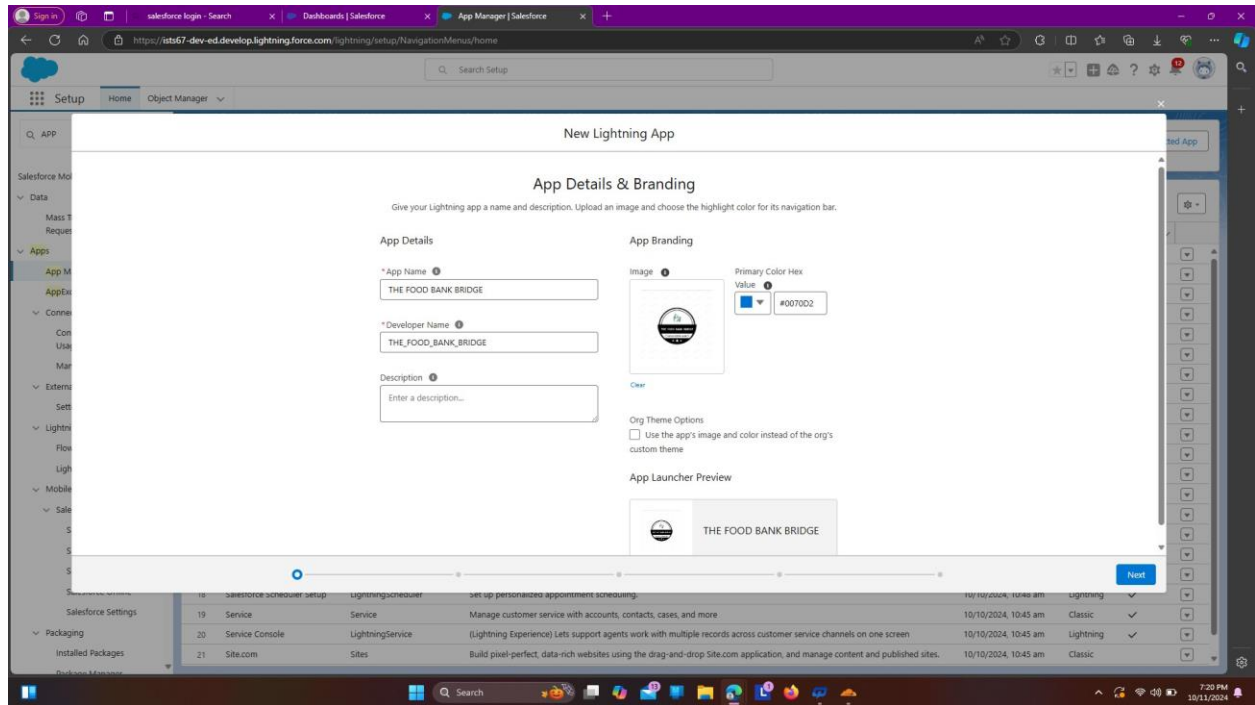
Action	Type	Description
Record Lock	Record Lock	Lock the record from being edited
Field Update	Field Update	Approval Status Update

Final Rejection Actions

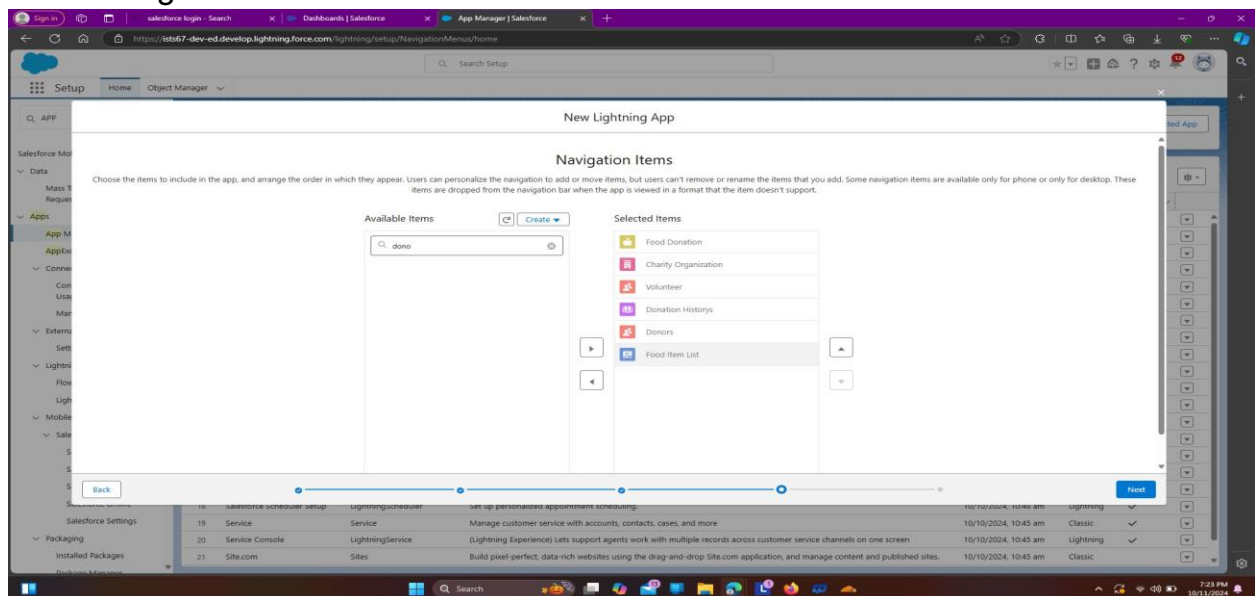
Action	Type	Description
Record Lock	Record Lock	Unlock the record for editing

Creating lightning app:

- 1.Navigate to setup
- 2.In the quick find box -Search for app manager
- 3.New Lightning App:
- 4.Fill the details

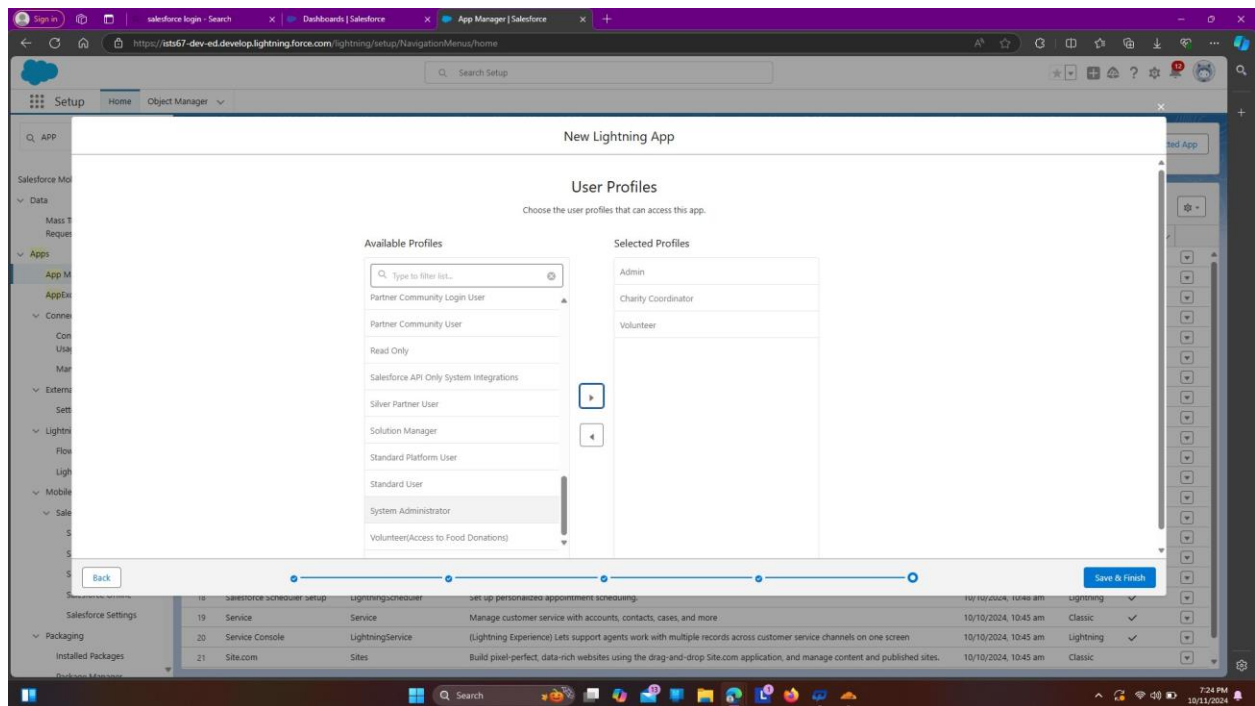


- 5.Click on next.
- 6.add navigation items



7. choose the user profiles

8. save & Finish



Creation of Dashboard:

1. Navigate to appLauncher

2. search for application which you created: THE FOOD BANK BRIDGE

3. Click on New Folder.

Folder Label : Custom Dashboards

Folder Unique Name : Auto Populated

Open Custom Dashboards and click on New Dashboards

Name : Organization Details

Click on Widget and select Chart or Table

In Select Report : Select Food Donations and Charity Organizations

4. In Add Component:

Display As : Select Lightning Table

Component Theme : Select Dark (Optional)

5. Save and Run the report

6. Click on Widget and select Image. Then click on Browse Files.

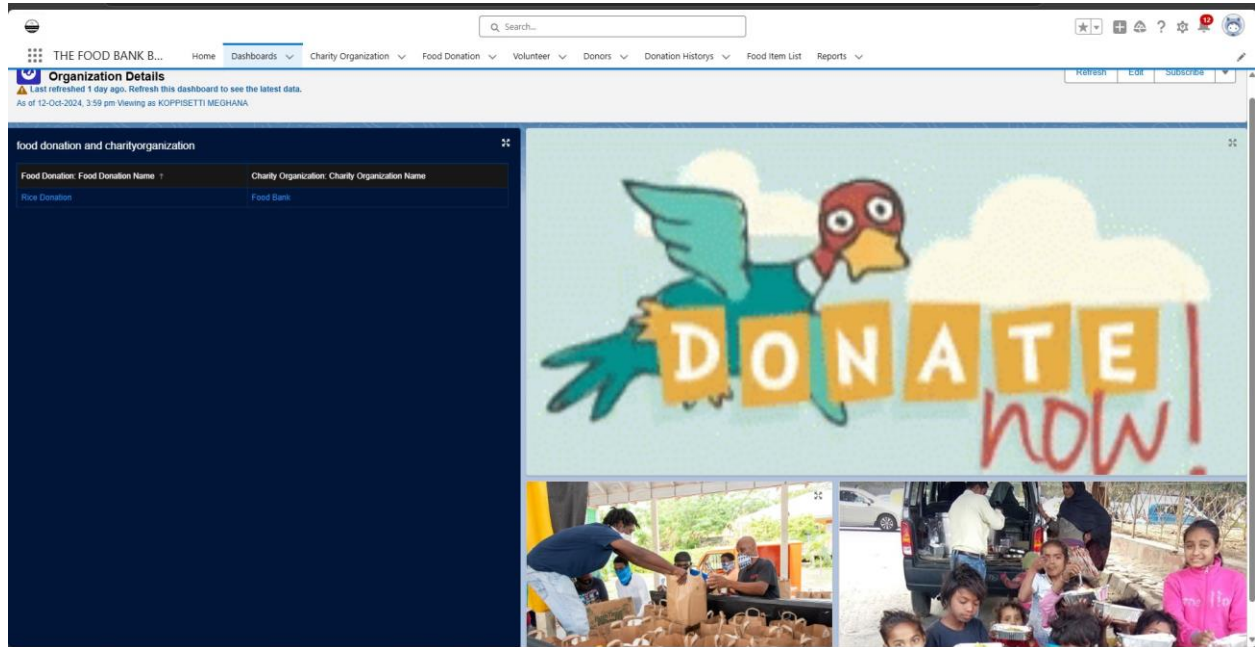
7. Then Select the Picture you want to upload in this Dashboard.

8 Then click on Save As :

Name : Organization Details

Click on Select Folder and select Custom Dashboards

9. Click on Select Folder and then Save.



Conclusion:

The application is designed to efficiently manage and distribute surplus food to those in need through a structured and automated system.

Ultimately, this application provides an effective platform for managing leftover food donations, ensuring timely delivery to those in need, optimizing volunteer engagement, and streamlining charity organization.

