



Project Title: The Giving Wardrobe

1. Project Overview

This project is focused on The Giving Wardrobe, designed to address the challenge of efficiently managing and distributing donated clothing to orphans in need. The goal is to deliver a comprehensive solution by leveraging the Salesforce platform to create a structured, automated, and user-friendly system for tracking donations, managing inventory, and organizing beneficiary information. Through this project, we aim to enhance operational efficiency, data accuracy, and user experience, supporting the long-term goal of providing reliable support to orphans and empowering the Donation Manager team in their mission to make a meaningful impact.

2. Objectives

- Business Goals:
 - Establish a streamlined and efficient system for managing clothing donations to orphans. Improve donor engagement by tracking contributions and providing acknowledgment. Enhance the visibility of donation and inventory data for better decision-making and planning.
- Specific Outcomes:
 - Donation Tracking:** Implement a system that records and tracks all donations, including donor details, item specifics, and donation dates.
 - Inventory Management:** Create an accurate, up-to-date record of clothing items, including type, size, condition, color, and quantity.
 - Beneficiary Profiles:** Maintain comprehensive profiles for orphans, capturing their needs, assigned donations, and delivery history.
 - Automated Acknowledgment:** Design a flow that automatically sends acknowledgment emails to donors, reinforcing donor relations.
 - Reporting & Analytics:** Generate custom reports and dashboards, such as monthly donation summaries, inventory levels, and top donors, to enable data-driven decisions.

3. Salesforce Key Features and Concepts Utilized

This highlights the main functionalities and concepts applied within the Salesforce project:

Custom Objects and Relationships: Created custom objects like Clothing_Item, Donation, Beneficiary, and Delivery to store and organize donation-related data, with relationships connecting donations to donors and beneficiaries.

Lightning App and Custom Tabs: Built a custom Lightning app, "The Giving Wardrobe," with dedicated tabs for easy access to objects, including Clothing Items, Donations, Beneficiaries, and Deliveries.

Record-Triggered Flows: Automated processes like Donation Acknowledgment and Delivery Status Updates Through record-triggered flows, sending notifications to donors and orphanages automatically based on specific actions.

Apex Trigger: Implemented an Apex Trigger on the Clothing_Item object to dynamically update the Total Items Donated field, ensuring accurate donation counts for each transaction.

Role-Based Access and Sharing Rules: Configured profiles, permissions, and sharing rules to ensure data security, granting different access levels to Admins, Donation Managers, and Orphanage Staff.

Reports and Dashboards: Created targeted reports, such as Monthly Donation Summaries and Inventory Status Reports, and dashboards like the Donations Overview to provide actionable insights to stakeholders.

Dynamic Dashboards: Utilized dynamic dashboards to allow users to view data specific to their permissions, supporting transparency and personalized access without compromising security.

4. Detailed Steps to Solution Design

→ OBJECT:

Navigate to Setup:

Go to the Setup page in Salesforce and click on Object Manager

1. create a custom object:

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

1. Enter the label name >> Donor
2. Plural label name >> Donors
3. Enter Record Name Label and Format
 - Record Name >> Donor Name
 - Data Type >> Text

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

Repeat the process for the following custom objects:

- DeliveryPoint
- Task
- Volunteer
- Execution Detail

Donor object:

SETUP > OBJECT MANAGER

Donor

Details

Description

API Name
Donor__c

Custom
✓

Singular Label
Donor

Plural Label
Donors

Enable Reports

✓ Track Activities

✓ Track Field History

✓ Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Delivery Point:

SETUP > OBJECT MANAGER

Delivery Point

Details

Description

API Name
Delivery_Point__c

Custom
✓

Singular Label
Delivery Point

Plural Label
Delivery Point

Enable Reports

✓ Track Activities

✓ Track Field History

✓ Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Task:

SETUP > OBJECT MANAGER

Task

Details

Description

API Name
Task__c

Custom
✓

Singular Label
Task

Plural Label
Tasks

Enable Reports

✓ Track Activities

✓ Track Field History

✓ Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Volunteer:

The screenshot shows the Salesforce Setup interface. In the top navigation bar, there are tabs for 'Home' and 'Object Manager'. The 'Object Manager' tab is selected. On the left, a sidebar lists various setup categories like 'Fields & Relationships', 'Page Layouts', and 'Record Types'. The main content area is titled 'Volunteer' under 'SETUP > OBJECT MANAGER'. It has two sections: 'Details' and 'Fields & Relationships'. The 'Details' section contains fields for 'API Name' (set to 'Volunteer__c'), 'Custom' (checked), 'Singular Label' (set to 'Volunteer'), and 'Plural Label' (set to 'Volunteers'). The 'Fields & Relationships' section includes options for 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (set to 'Deployed'), and 'Help Settings' (set to 'Standard salesforce.com Help Window'). At the bottom right of the main content area are 'Edit' and 'Delete' buttons.

Execution Detail:

The screenshot shows the Salesforce Setup interface. The 'Object Manager' tab is selected. The left sidebar shows various setup categories. The main content area is titled 'Execution Detail' under 'SETUP > OBJECT MANAGER'. It has two sections: 'Details' and 'Fields & Relationships'. The 'Details' section contains fields for 'API Name' (set to 'Execution_Detail__c'), 'Custom' (checked), 'Singular Label' (set to 'Execution Detail'), and 'Plural Label' (set to 'Execution Details'). The 'Fields & Relationships' section includes options for 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (set to 'Deployed'), and 'Help Settings' (set to 'Standard salesforce.com Help Window'). At the bottom right of the main content area are 'Edit' and 'Delete' buttons.

→ Tabs:

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

1. Creating A Custom Tab:

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

Select Object(Donor) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .

Make sure that the Append tab to users' existing personal customizations is checked.
Click save

2. Creating Remaining Tabs:

Now create the Tabs for the remaining Objects, they are “Delivery Point, Task, Volunteer, Execution Details”.

Follow the same steps as mentioned in Activity -1 .

The screenshot shows the Salesforce Setup interface under the 'Content' tab. A banner at the top says 'It's Better in Lightning' and 'Move to Lightning Experience and give your users a productivity boost.' Below the banner, there are sections for 'Custom Tabs', 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs'. In the 'Custom Tabs' section, there is a table listing five tabs with their labels and styles:

Action	Label	Tab Style	Description
Edit Del	Delivery Point	Shopping Cart	
Edit Del	Donors	Apple	
Edit Del	Execution Details	Computer	
Edit Del	Tasks	Bank	
Edit Del	Volunteers	Caduceus	

→ The Lightning App:

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

Fill the app name in app details and branding as follow

App Name : The Giving Wardrobe

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.

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

App Details & Branding

App Details

- App Name: The Giving Wardrobes
- Developer Name: Clothing_Wardrobes
- Description: Enter a description...

App Branding

- Image: Placeholder image of a donation box.
- Primary Color Hex Value: #0070D2
- Org Theme Options: Use the app's image and color instead of the org's custom theme (unchecked)

App Launcher Preview

(Utility Items) keep it as default >> Next.

To Add Navigation Items:

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

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

- Accounts
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions
- Asset State Periods
- Assets

Selected Items

- Home
- Donors
- Delivery Point
- Tasks
- Tasks
- Execution Details
- Volunteers
- Reports
- Dashboards

To Add User Profiles

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

→ Adding Fields to the Objects:

Follow standard Salesforce procedures to add required fields to the following objects:

Donor:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
contact Email	contact_Email__c	Email		
contact phone	contact_phone__c	Phone		
Created By	CreatedByld	Lookup(User)		
Donor Location	Donor_Location__c	Long Text Area(32768)		
Donor Name	Name	Text(80)		
Last Modified By	LastModifiedByld	Lookup(User)		
Location	Location__c	Geolocation		
Owner	OwnerId	Lookup(User,Group)		

Delivery Point:

Delivery Point

Fields & Relationships					
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Created By	CreatedBy	Lookup(User)			
Delivery Point Name	Name	Text(80)		✓	
Distance	Distance__c	Number(14, 4)			
Last Modified By	LastModifiedBy	Lookup(User)			
Location2	Location2__c	Geolocation			
Owner	OwnerId	Lookup(User,Group)		✓	
State	State__c	Picklist			

Task:

Task

Fields & Relationships					
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Cloth category	Cloth_category__c	Picklist (Multi-Select)			
cloths quality	cloths_quality__c	Picklist			
Created By	CreatedBy	Lookup(User)			
Date	Date__c	Date			
Delivery Point	Delivery_Point__c	Lookup(Delivery Point)			
Donor	Donor__c	Lookup(Delivery Point)		✓	
Feedback	Feedback__c	Long Text Area(32768)			
Last Modified By	LastModifiedBy	Lookup(User)			
Name of the person	Name_of_the_person__c	Text(20)			
Number of people Donated	Number_of_people_Donated__c	Number(18, 0)			
Owner	OwnerId	Lookup(User,Group)		✓	

Volunteer:

Volunteer

Fields & Relationships		13 items, Sorted by Field Label			
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Address	Address__c	Long Text Area(32768)		
Lightning Record Pages	Age	Age__c	Number(18, 0)		
Buttons, Links, and Actions	Available On	Available_On__c	Date		
Compact Layouts	contact Number	contact_Number__c	Number(18, 0)		
Field Sets	Created By	CreatedBy	Lookup(User)		
Object Limits	Date of birth	Date_of_birth__c	Date		
Record Types	Delivery Point	Delivery_Point__c	Master-Detail(Delivery Point)	✓	
Related Lookup Filters	Email	Email__c	Email		
Search Layouts	Excution ID	Excution_ID__c	Auto Number (External ID)	✓	
List View Button Layout	Gender	Gender__c	Picklist		
Restriction Rules	Last Modified By	LastModifiedBy	Lookup(User)		
Scoping Rules					
Object Access					
Triggers					

Execution Detail:

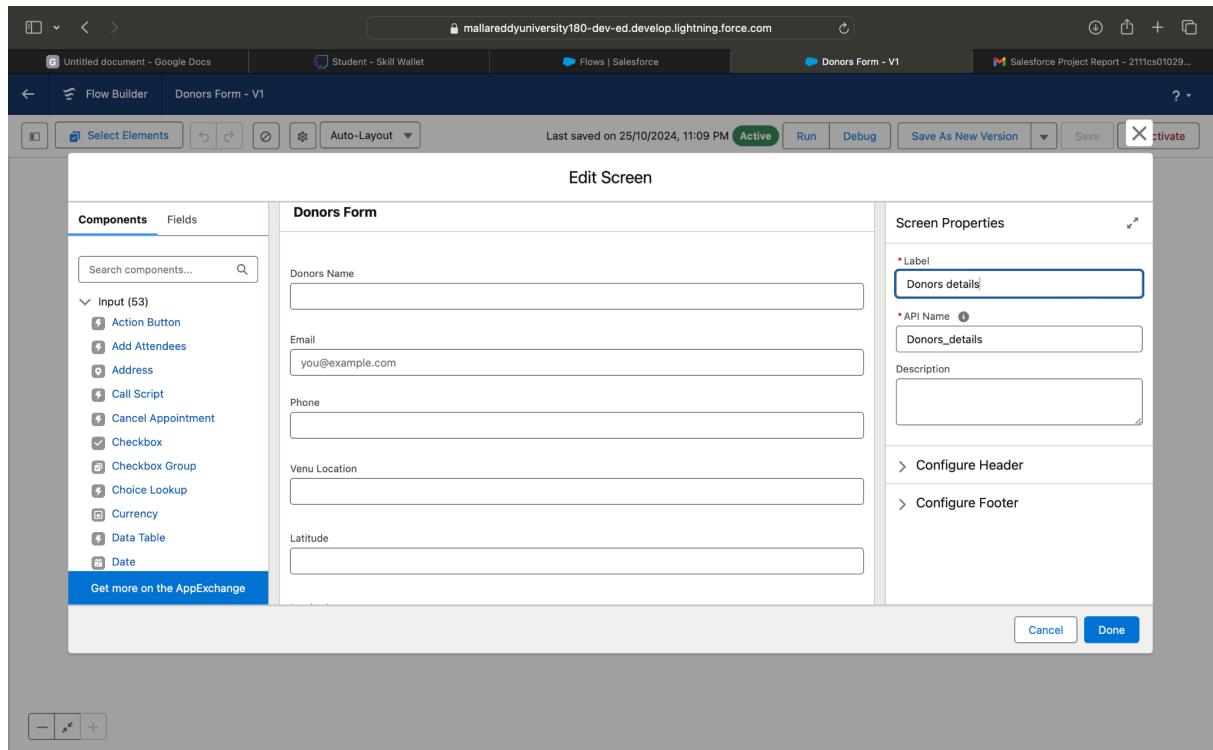
Execution Detail

Fields & Relationships		5 items, Sorted by Field Label			
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedBy	Lookup(User)		
Lightning Record Pages	Execution Detail Name	Name	Text(80)	✓	
Buttons, Links, and Actions	Last Modified By	LastModifiedBy	Lookup(User)		
Compact Layouts	Task	Task__c	Master-Detail(Task)	✓	
Field Sets	Volunteer	Volunteer__c	Master-Detail(Volunteer)	✓	

→ Flows:

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.
3. Click on create.Click on the ‘+’ icon in between start and end, and click on the screen element.
5. Under the Screen Properties:
 Label : Venue Details
 API Name : Venue_Details
6. Now let's 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 : Email
 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

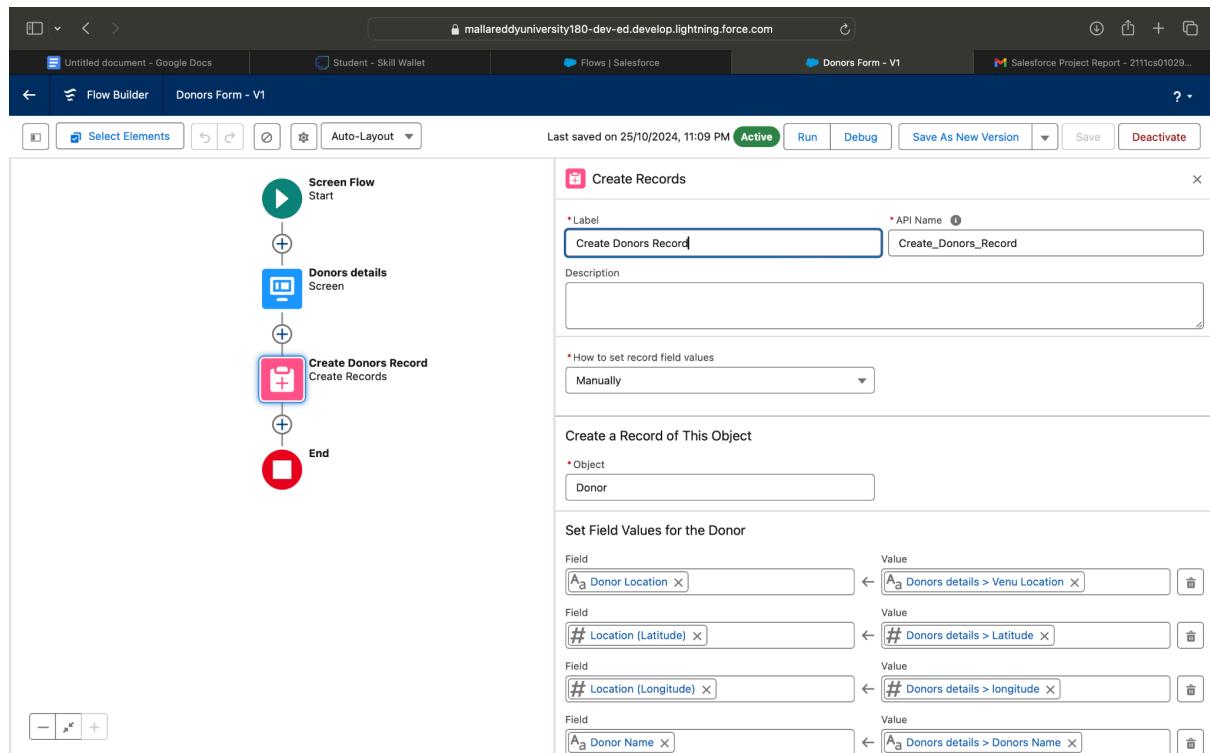
Label : Create Venue Record
 API Name : Create_Venue_Record
 How Many Records to Create : One
 How to Set the Record Fields : Use separate resources, and literal values
 Object : Venue
 Set Field Values for the Venue : Click on ‘Add Field’ 5 times
 Field : Value = Contact_Email_c : {!Contact_Email.value}
 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



5. Testing and Validation

→ Apex Triggers:

Log into the trailhead account, navigate to the gear icon in the top right corner.
 Click on developer console and you will be navigated to a new console window.
 Click on the File menu in the toolbar, and click on new >> Trigger.
 Enter the trigger name and the object to be triggered.

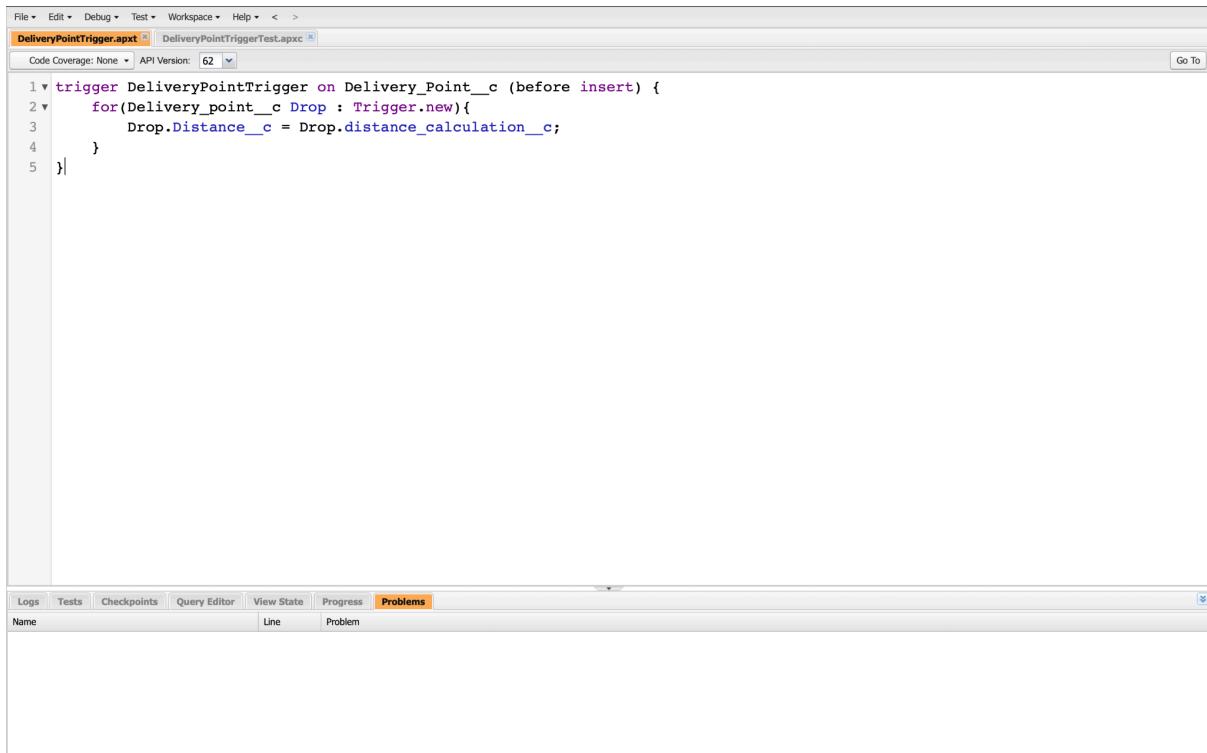
Enter Name : DeliveryPointTrigger

sObject: Delivery Point

Click on Submit.

Code:

```
trigger DeliveryPointTrigger on Delivery_Point__c (before insert) {  
    for(Delivery_point__c Drop : Trigger.new){  
        Drop.Distance__c = Drop.distance_calculation__c;  
    }  
}
```



The screenshot shows the Salesforce IDE interface. The top navigation bar includes File, Edit, Debug, Test, Workspace, Help, and various icons. A tab bar at the top has 'DeliveryPointTrigger.apxt' selected. Below the tabs, there are dropdowns for 'Code Coverage: None' and 'API Version: 62'. On the right side of the header, there's a 'Go To' button. The main workspace displays the Apex trigger code. At the bottom, a navigation bar has tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems, with 'Problems' being the active tab. The problems section is currently empty.

```
trigger DeliveryPointTrigger on Delivery_Point__c (before insert) {  
    for(Delivery_point__c Drop : Trigger.new){  
        Drop.Distance__c = Drop.distance_calculation__c;  
    }  
}
```

→ Apex Class:

Create a test class for the apex trigger

Code:

```
@isTest  
public class DeliveryPointTriggerTest {  
    @isTest  
    static void testDistanceAssignment() {  
        Delivery_point__c dropOff = new Delivery_point__c(  
            Distance__c = 100  
        );  
        insert dropOff;  
        Delivery_point__c result = [SELECT Id, Distance__c, distance_calculation__c FROM  
        Delivery_point__c WHERE Id = :dropOff.Id];  
        System.assertEquals(result.Distance__c, result.distance_calculation__c, 'The  
        distance_calculation__c field should match Distance__c');  
    }  
}
```

```
1  @isTest
2  public class DeliveryPointTriggerTest {
3      @isTest
4      static void testDistanceAssignment() {
5          Delivery_point__c dropOff = new Delivery_point__c(
6              Distance__c = 100
7          );
8          insert dropOff;
9          Delivery_point__c result = [SELECT Id, Distance__c, distance_calculation__c FROM Delivery_point__c WHERE Id = :dropOff];
10         System.assertEquals(result.Distance__c, result.distance_calculation__c, 'The distance_calculation__c field should match');
11     }
12 }
```

→ Profiles

Go to setup page >> type Profiles in Quick Find bar >> click on Profiles >> click on ‘S’

Click on Clone beside Standard Platform User.

Under Clone Profile:

Profile Name : NGOs Profile

Then click on Save

Profile
Clothing Profile
← Back to List: Profiles

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

	Name	Actions	Custom Profile
User License	Salesforce Platform	Edit Clone Delete	<input checked="" type="checkbox"/>
Description			
Created By	sai priyanka pala, 25/10/2024, 8:46 pm		Modified By sai priyanka pala , 26/10/2024, 8:10 pm

Page Layouts

Standard Object Layouts	Global	Fulfillment Order Item Adjustment	Fulfillment Order Item Adjustment Layout
Email Application	Not Assigned		[View Assignment]
Home Page Layout	Home Page Default		[View Assignment]
Account	Account Layout		[View Assignment]
Alternative Payment Method	Alternative Payment Method Layout		[View Assignment]
Appointment Invitation	Appointment Invitation Layout		[View Assignment]

→ Users:

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

In General Information give details as: (Note : create users as per your wish Clothing)

First Name , Last Name, Alias, Email, Username, Nickname, User License, Profile, Active.

Click on Save

User
chinni Foundation chinni_Foundation

Permission Set Assignments (0) | Permission Set Assignments: Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Memberships (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Apps (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0) | User Provisioning Accounts (0)

User Detail		Role	
Name	chinni Foundation chinni_Foundation	User License Profile	Salesforce Platform
Alias	cchin	Marketing User	<input checked="" type="checkbox"/>
Email	cchin@gmail.com [Verify]	Offline User	<input type="checkbox"/>
Username	cchin@gmail.com	Knowledge User	<input type="checkbox"/>
Nickname	User1729869879327791446	Flow User	<input type="checkbox"/>
Title		Service Cloud User	<input type="checkbox"/>
Company		Site.com Contributor User	<input type="checkbox"/>
Department		Site.com Publisher User	<input type="checkbox"/>
Division		WDC User	<input type="checkbox"/>
Address		Mobile Push Registrations	View
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Data.com User Type	[Edit]
Locale	English (India)	Accessibility Mode (Classic Only)	<input type="checkbox"/> [Edit]
Language	English	Debug Mode	<input type="checkbox"/> [Edit]
Delegated Approver		High-Contrast Palette on Charts	<input type="checkbox"/> [Edit]
Manager		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Salesforce CRM Content User	<input checked="" type="checkbox"/>
Federation ID		Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
App Registration: One-Time Password Authenticator	[Edit]	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator	[Edit]	Make Setup My Default Landing Page	<input type="checkbox"/>
Security Key (U2F or WebAuthn)	[Edit]		
Lightning Login	[Edit]		
Temporary Verification Code (Expires in 1 to 24 Hours)	[Generate] [Edit]		

Create another One Users by following steps in Activity - 1 with similar User License and Profile.

Give Different First Name, Last Name based on Different Clothing.

User Detail		Role	
Name	Rao Foundation Rao_Foundation	User License	Salesforce Platform
Alias	rrao_	Profile	Clothing Profile
Email	sai@gmail.com [Verify]	Active	<input checked="" type="checkbox"/>
Username	pala@pala.com	Marketing User	<input type="checkbox"/>
Nickname	raoooooo	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address		Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	<input type="checkbox"/>
Language	English	Data.com User Type	<input type="checkbox"/>
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Manager	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Receive Approval Request Emails		High-Contrast Palette on Charts	<input type="checkbox"/>
Federation ID		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: One-Time Password Authenticator			

→ Public Groups:

Go to setup page >> type Public Groups in Quick Find bar >> click on Public Groups >> click on New.

Under Group Information: Label, Group Name, Grant Access Using Hierarchies : Check.

In Search, Select Users.

In Selected Members Add Iksha Foundation and System Administrator

Group chiini							
Label	chiini						
Group Name	chiini						
Grant Access Using Hierarchies	<input checked="" type="checkbox"/>						
Description							
Created By	sai priyanka pala, 25/10/2024, 8:55 pm						
Modified By	sai priyanka pala, 25/10/2024, 8:55 pm						
<table border="1"> <thead> <tr> <th colspan="2">View All Users</th> </tr> </thead> <tbody> <tr> <td>Name</td> <td>chiini Foundation chiini_Foundation</td> </tr> <tr> <td>Type</td> <td>User</td> </tr> </tbody> </table>		View All Users		Name	chiini Foundation chiini_Foundation	Type	User
View All Users							
Name	chiini Foundation chiini_Foundation						
Type	User						

By Following Steps in Activity 1, Create other two Public Groups for other two users.

After Saving this would look like this.

The screenshot shows the Salesforce Lightning Experience interface. At the top, there's a banner with the text "It's Better in Lightning" and "Move to Lightning Experience and give your users a productivity boost." Below the banner, the main content area displays the "Public Groups" page. On the left, there's a sidebar with various links like "Home", "Chatter", "Libraries", "Content", "Subscriptions", "Lightning Experience Transition Assistant", "Salesforce Mobile Quick Start", "Home", "Administrator", and "Release Updates". The main content area has a heading "Public Groups" and a sub-section "A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy." Below this, there's a table with two rows of data:

Action	Label	Group Name	Created By	Created Date
Edit Del	chini	chini	pala_sai priyanka	25/10/2024, 8:55 pm
Edit Del	Rao	Rao	pala_sai priyanka	25/10/2024, 8:55 pm

→ Reports 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.

In Define the Custom Report Type:

Primary Object : Select donors

Report Type Label : donor with delivery point with Volunteer

Report Type Name : donor_with_delivery_point_with_Volunteer

Description : donor with delivery point with Volunteer

Store in Category : Select Other Reports

Deployment Status : Deployed

Click on Next

Near Click to relate another Object Select Drop-Off Points.

And also select "A" records may or may not have related "B" records.

Now again Near Click to relate another Object Select Volunteers.

Now click on Save.

The screenshot shows the Salesforce 'All Custom Report Types' page. The left sidebar includes links for Lightning Experience Transition Assistant, Get Started, Salesforce Mobile Quick Start, Home, Administer, and various system management options. The main content area displays a table of custom reports with columns for Action, Label, Description, Category, Deployed, Created By Alias, and Created Date. The table lists several reports related to orchestration runs, program definitions, and progress, all categorized under 'Other Reports' and created by 'spala' on 25/10/2024.

Action	Label	Description	Category	Deployed	Created By Alias	Created Date
Edit Del	Delivery Point with Volunteers with Execution Details	Delivery Point with Volunteers with Execution Details	Other Reports	✓	spala	25/10/2024
Edit Del	Donor with drop of volunteer	Donor with drop of volunteer	Other Reports	✓	spala	25/10/2024
Edit Del	Orchestration Run Logs Spring '24	Find out which orchestration run logs were created and what happened in their associated orchestration runs.	Other Reports	✓	autopro	25/10/2024
Edit Del	Orchestration Runs Spring '24	Find out which orchestration runs were created.	Other Reports	✓	autopro	25/10/2024
Edit Del	Orchestration Stage Runs Spring '24	Find out which orchestration stage runs were created and the current status of each run.	Other Reports	✓	autopro	25/10/2024
Edit Del	Orchestration Step Runs Spring '24	Find out which orchestration step runs were created and the current status of each run.	Other Reports	✓	autopro	25/10/2024
Edit Del	Orchestration Work Items Spring '24	Find out which orchestration work items were created, who's the associated assignee, and what's the current status of each work item.	Other Reports	✓	autopro	25/10/2024
Edit Del	Program Definition Spring '24	Review your analytics with a program-like structure. See each program task, target day, results, and more directly in a report and dashboard.	Other Reports	✓	autopro	25/10/2024
Edit Del	Program Definition Summer '24	Review your analytics with a program-like structure. See each program task, target day, results, and more directly in a report and dashboard.	Other Reports	✓	autopro	25/10/2024
Edit Del	Program Item Progress Spring '24	Report on tasks like exercises, milestones, and outcomes progress. Overall program progress isn't captured in this report.	Other Reports	✓	autopro	25/10/2024
Edit Del	Program Item Progress Summer '24	Report on tasks like exercises, milestones, and outcomes progress. Overall program progress isn't captured in this report.	Other Reports	✓	autopro	25/10/2024
Edit Del	Program Progress Spring '24	Report on program progress. Specific progress on milestones and exercises aren't captured in this report.	Other Reports	✓	autopro	25/10/2024
Edit Del	Program Progress Summer '24	Report on program progress. Specific progress on milestones and exercises aren't captured in this report.	Other Reports	✓	autopro	25/10/2024
Edit Del	Screen Flows	Find out which flows get executed and how long users take to complete each flow screen.	Other Reports	✓	autopro	25/10/2024

→ Reports:

Creation Of Report On Venue With DropOff With Volunteer:

Go to the app(FoodConnect) >> click on the reports tab

Click on New Folder.

- Folder Label : Custom Reports
- Folder Unique Name : CustomReports

Open Custom Reports and click on New Report

Select Report Type : Venue with DropOff with Volunteer

Then click on Start Report.

In GROUP ROWS : Add Volunteer Name

In Columns : Add Venue Name, Drop-Off point Name, Distance.

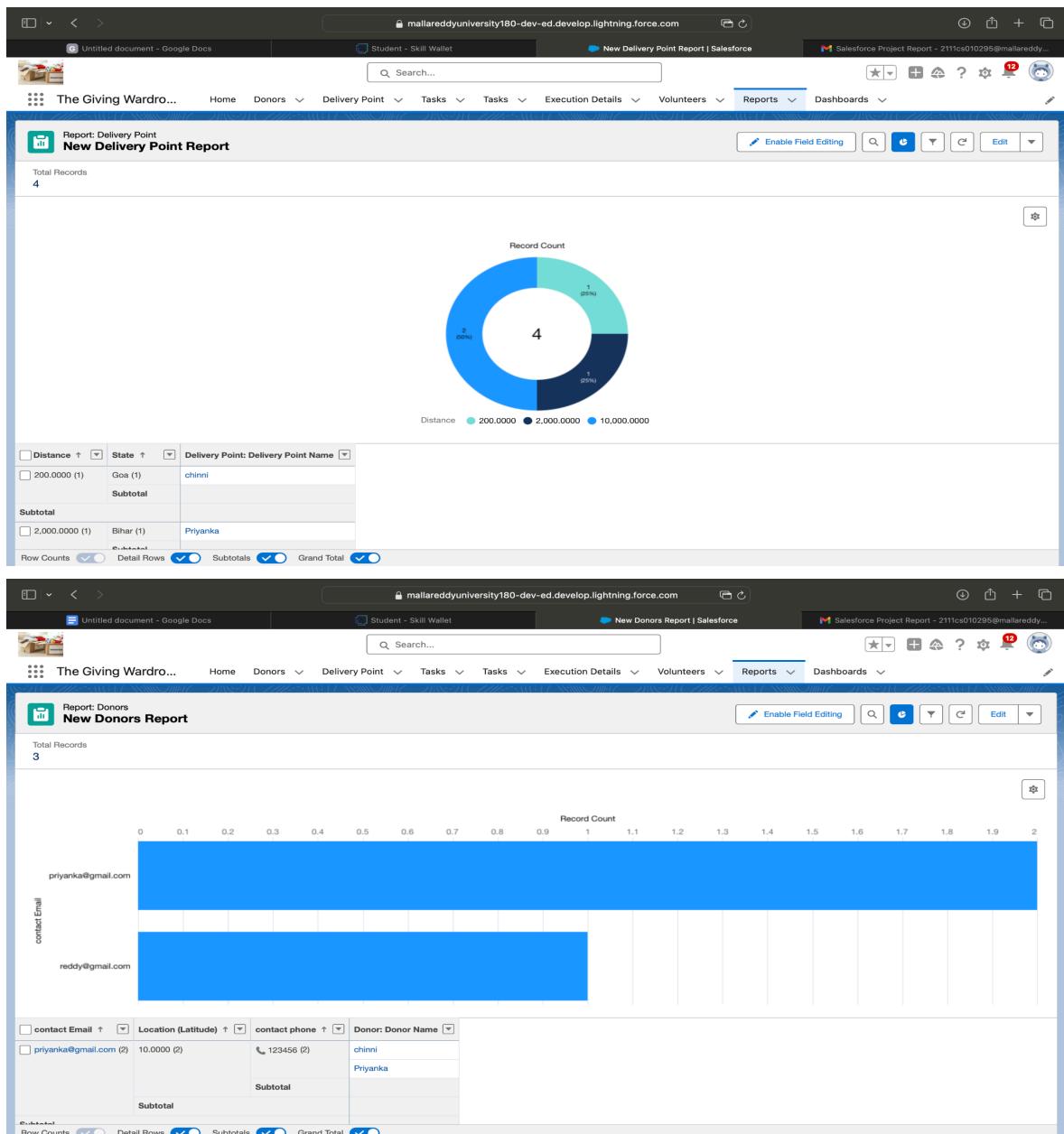
Now click on Save & Run.

Give Label as :

Report Name : venue and Drop Off point

Report Unique Name : Auto Populated

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



→ Dashboards:

Create a clothing dashboard:

Go to the app(FoodConnect) >> click on the Dashboards tab.

Click on New Folder.

Folder Label

Folder Unique Name

Open Custom Dashboards and click on New Dashboards

Name : Organization Details

Click on Widget and select Chart or Table

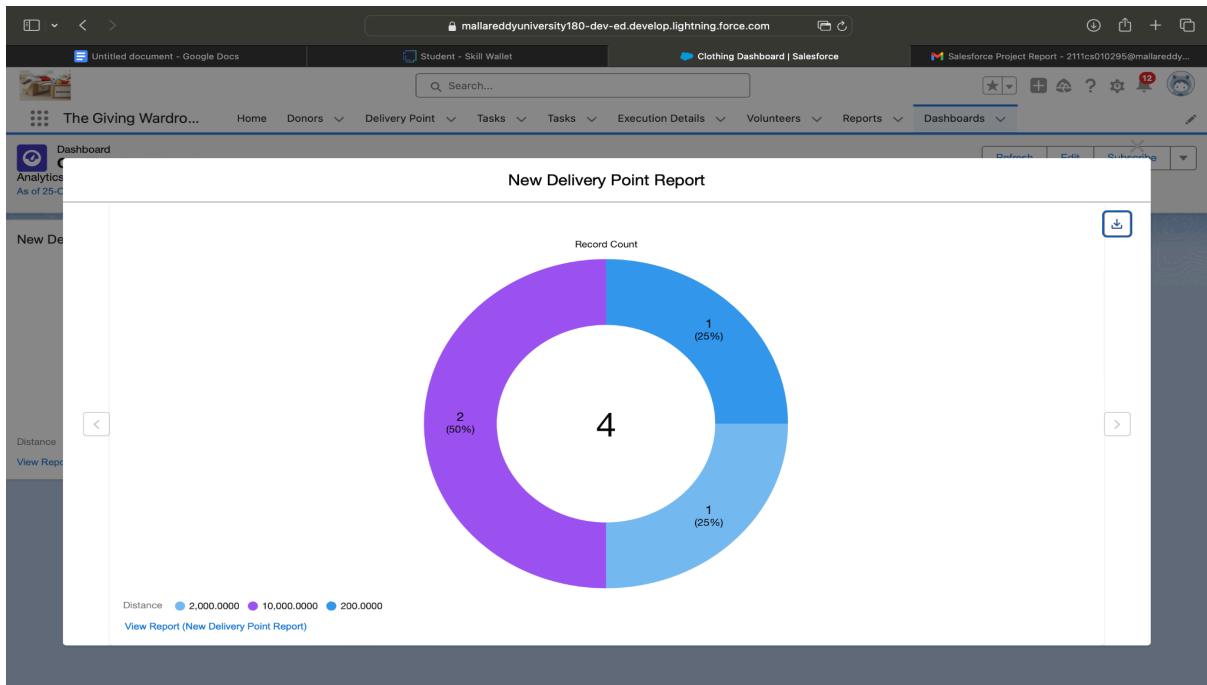
In Select Report : Select Clothing Report.

Then click on select

In Add Component:

Display As : Select donut chart

Component Theme : Select Dark (Optional)



→ Sharing Rule:

Go to setup >> type Sharing Settings in quick find box >> Click on the Sharing Settings. Scroll down and find Delivery point Sharing Rules.

Click on new near Delivery point Sharing Rules and Name it as:

Label : Rule 1

Rule Name : Rule_1

Select your rule type : Select Based on criteria.

Select which records to be shared:

Field : Operator : Value = Distance : less than : 15

Select the users to share with : Near Share With

Public Groups : Iksha

Click on Save.

Click on new near Delivery point Sharing Rules and Name it as:

Label : Rule 2

Rule Name : Rule_2

Select your rule type : Select Based on criteria.

Select which records to be shared:

Field : Operator : Value = Distance : greater than : 15

Field : Operator : Value = Distance : less or equal : 30

Select the users to share with : Near Share With

Public Groups : NSS

Click on Save.

Click on new near Delivery point Sharing Rules and Name it as:

Label : Rule 3

Rule Name : Rule_3

Select your rule type : Select Based on criteria.

Select which records to be shared:

Field : Operator : Value = Distance : greater than : 30

Field : Operator : Value = Distance : less or equal : 50

Select the users to share with : Near Share With

Public Groups : Street Cause

Click on Save.

→ Home Page:

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

Select Home Page and give Label as HOME Page.

Select Standard Home Page.

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

On the right hand side:

Flow : Donor Flow

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

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

Add FoodConnect App and then Save.

FoodConnect Home Page would Look Like this

7. Conclusion

Summary of Achievements:

With this Salesforce setup, *The Giving Wardrobe* has accomplished a robust solution to manage donations, track inventory, and coordinate deliveries. Salesforce now enables streamlined donor management, accurate tracking of clothing donations, and enhanced transparency in aiding orphans, supported by detailed reports and dashboards that provide insight into project impact and operational efficiency.

