

TITLE : To supply leftover food to poor

Category:

Salesforce developer

Skills Required:

Salesforce Admin, Salesforce Developer

Project Description:

The *Food for All* project aims to reduce food waste and combat hunger by collecting safe, surplus food from restaurants, hotels, events, and households and redistributing it to underprivileged individuals and communities. Every day, large quantities of edible food are discarded while many people struggle to afford a meal. This project bridges that gap by creating a sustainable food-sharing network.

Through partnerships with local food businesses, volunteers, and charitable organizations, the project ensures that leftover food is collected, stored safely, and distributed efficiently to those in need. The initiative promotes community participation, food safety, and environmental responsibility while fostering compassion and social equity.

TEAM ID: NM2025TMID05825

TEAM LEADER:

1.PRAKASH G (811022104036)

TEAM MEMBERS:

2.PRADEEP S (811022104035)

3.PRATHIKSHA B (811022104038)

4.PREMA S (811022104039)

Phase 1: Ideation

Problem Statement:

Every day, a significant amount of edible food is wasted in restaurants, hotels, households, and social events, while at the same time, millions of people struggle to secure even one proper meal. This imbalance between food surplus and hunger highlights a major social and environmental challenge.

Food waste contributes to increased landfill use, greenhouse gas emissions, and the loss of valuable resources used in food production. Meanwhile, hunger leads to malnutrition, poor health, and reduced productivity among vulnerable groups such as the homeless, low-income families, and daily wage earners.

Proposed Solution:

To address the twin challenges of food waste and hunger, the project proposes the establishment of a **food recovery and redistribution system** that collects safe, leftover food from reliable sources and delivers it to people in need.

Key Components of the Solution:

1. Food Collection Network:

- Partner with restaurants, hotels, caterers, and households willing to donate surplus food.

2. Safe Handling & Storage:

- Implement hygiene standards for food collection, packaging, and transportation.

3. Distribution System:

- Deliver food to shelters, orphanages, old-age homes, and low-income areas through NGOs or volunteers.

Objectives:

1. Reduce Food Waste:

To minimize the amount of edible food discarded by collecting and redistributing surplus food from restaurants, hotels, events, and households.

2. Alleviate Hunger:

To provide nutritious meals to poor, homeless, and underprivileged individuals who lack regular access to food.

3. Promote Food Safety:

To ensure all collected food is handled, stored, and distributed following proper hygiene and safety standards.

4. Increase Awareness:

To educate the public about food waste, hunger issues, and the importance of sharing surplus food responsibly.

Key Features / Functionalities

1. User Registration & Authentication

Configure **Salesforce Organization Profile**

- Company information (Name, Address, Fiscal Year, Locale, Currency, Time Zone).

Enable **necessary Salesforce Editions** (e.g., Nonprofit Cloud, Sales Cloud, or Service Cloud).

Set up **custom domains** (e.g., foodrescue.my.salesforce.com).

2. Food Donation Management

- Donors can **list available leftover food** with details such as:
 - Food type, quantity, freshness, expiry time
 - Pickup location and contact information
- Option to **upload food images** for transparency.
- Automated **food safety checklist** before listing

3. Notification & Communication

- In-app and SMS/email **alerts** for donation confirmations, pickup times, and delivery updates.
- **Chat or message system** for coordination between donors and volunteers.

4. Testing & Deployment

- Perform **User Acceptance Testing (UAT)** with sample data.
- Validate **workflows, reports, and permissions**.
- Migrate setup from **Sandbox to Production** after successful testing.

Expected Outcomes:

- **Improved Awareness:** Educates the community about food wastage and encourages sustainable consumption practices.
- **Reduced Food Waste:** Significant leftover food that would have gone to landfills is redirected to feed people.

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PHASE 2: REQUIREMENT ANALYSIS

Milestone1: Salesfore Account

Introduction:

In Salesforce, an **Account** represents an **organization, company, or individual** that your business or system interacts with. It is one of the core objects in Salesforce and serves as a central record to **store information, manage relationships, and track activities** related to that entity.

What is Salesforce?

Salesforce is a **cloud-based Customer Relationship Management (CRM) platform** that helps organizations manage their interactions with customers, clients, and other stakeholders efficiently. It provides tools to handle **sales, service, marketing, operations, and analytics**, all within a centralized platform.

Activity 1:

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 :

Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

Sign up for your Developer Edition.

- ✓ Build apps fast with drag-and-drop tools
- ✓ Go further with Apex code
- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs



A free Salesforce Platform environment with Agentforce and Data Cloud

| | |
|----------------------|------------------------------------|
| First name | Last name |
| <input type="text"/> | <input type="text"/> |
| Job title | Work email |
| <input type="text"/> | <input type="text"/> |
| Company | Country/Region |
| <input type="text"/> | <input type="text" value="India"/> |

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

- ☐ I agree to the [Main Services Agreement – Developer Services](#) and [Salesforce Program Agreement](#). I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

We value your privacy. To learn more, visit our [Privacy Statement](#).

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

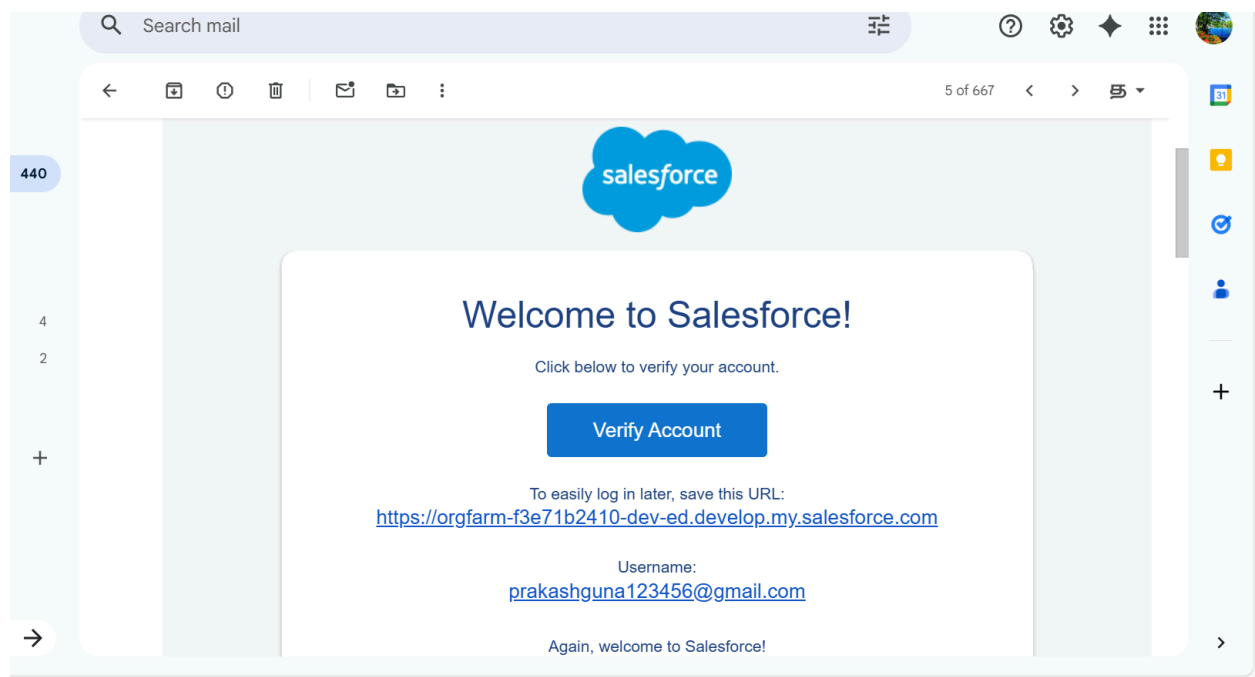
This need not be an actual email id, you can give anything in the format :
username@organization.com
Click on sign me up after filling these.

Activity 2:

Account

Go to the inbox of the email that

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



Change Your Password

Enter a new password for
prakashguna123456@gmail.com. Make sure to include at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

* New Password

..... Good

* Confirm New Password

..... Match

New Security Question

▼ In what city were you born?

New Answer

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

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with the Salesforce logo, a search bar labeled "Search Setup", and several utility icons. Below this is a sub-navigation bar with "Setup", "Home", and "Object Manager". The main content area has a left sidebar with a "Quick Find" search bar and a list of categories: "Setup Home", "Salesforce Go", "Release Updates", "Lightning Usage", "Sales Cloud Everywhere", "ADMINISTRATION" (with sub-items: Users, Data, Email), and "PLATFORM TOOLS" (with sub-items: Apps, Feature Settings, Heroku). The main content area displays a "Welcome, Iksha Foundation" message, followed by a section titled "Achieve Popular Business Goals" with two cards: "Service" (Deliver Service Across Channels) and "Sales" (Unify Prospect Communications). Each card includes a description and a list of included features. At the bottom, there's a URL bar showing the current page and two "Keep Going" buttons.

Milestone 2:Object

What is a Salesforce Object?

In Salesforce, an **Object** is like a **database table** that stores specific types of information. Each object contains **records** (rows) and **fields** (columns), similar to a spreadsheet.

Objects help organize and manage data — such as details about customers, donations, volunteers, or any other entities your system needs to track.

Types of Objects in Salesforce

1. Standard Objects

These are **predefined by Salesforce** and available in every account. Common standard objects include:

- **Account:** Represents an organization or company.
- **Contact:** Represents a person linked to an account.
- **Opportunity:** Tracks potential sales or donations.
- **Case:** Records service or support issues.
- **User:** Represents people who use Salesforce.

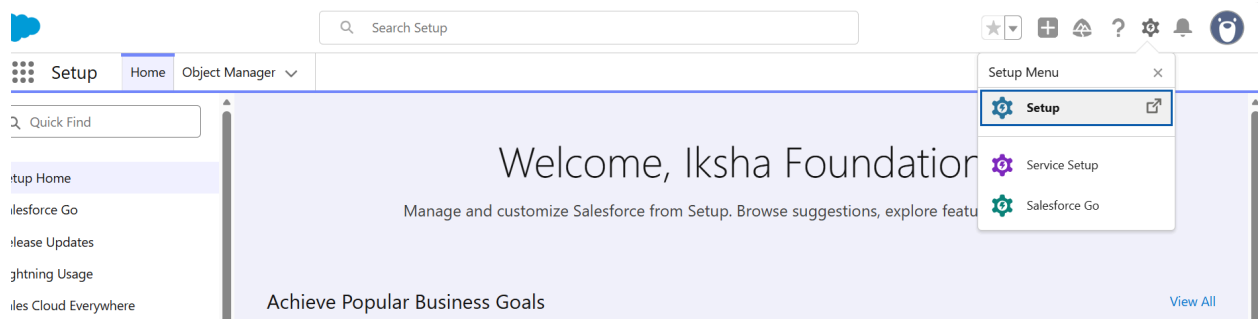
2. Custom Objects

These are **created by users or developers** to store data specific to their organization's needs.

For example, in a **Leftover Food Supply System**, you could create:

- **Food_Donation__c** → Stores information about donated food.
- **Volunteer__c** → Tracks volunteer details.
- **Beneficiary__c** → Keeps records of recipients or NGOs.
- **Pickup__c** → Tracks pickup and delivery details.

To Navigate to Setup Page :



To create an object:

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

Object.

Search Setup

Setup Home **Object Manager**

Object Manager
53+ Items, Sorted by Label

Quick Find Create

Custom Object
Custom Object from Spreadsheet

| Label | API Name | Type | Description | Last Modified By |
|------------|-----------|-----------------|-------------|------------------|
| Account | Account | Standard Object | | |
| Activity | Activity | Standard Object | | |
| Address | Address | Standard Object | | |
| Agent Work | AgentWork | Standard Object | | |

- On Custom object defining page:
- Enter the label name, plural label name, click on Allow reports, Allow search.

Search Setup

Setup Home **Object Manager**

New Custom Object

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information ⓘ Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name Example: Account Name

Data Type Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

☐ Allow Reports
☐ Allow Activities
☐ Track Field History
☐ Allow in Chatter Groups
☐ Enable Licensing ⓘ

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing
☒ Allow Bulk API Access
☒ Allow Streaming API Access

Deployment Status [What is this?](#)

☐ In Development
☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☐ Allow Search

Object Creation Options (Available only when custom object is first created)

☐ Add Notes and Attachments related list to default page layout
☐ Launch New Custom Tab Wizard after saving this custom object

4. Click on Save.

Activity1:Create Venue Object

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >>Click on Custom Object.
 1. Enter the label name >> Venue
 2. Plural label name >> Venues
 3. Enter Record Name Label and Format
 - Record Name >> Venue Name
 - Data Type >> Text
2. Click on Allow reports and Track Field History,Allow Activities.
3. Allow search >> Save.

Activity2: Create Drop-Off Point Object

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
 1. Enter the label name >> Drop-Off Point
 2. Plural label name>> Drop-Off Points
 3. Enter Record Name Label and Format
 - Record Name >> Drop-Off point Name
 - Data Type >> Text
2. Click on Allow reports and Track Field History,Allow Activities
3. Allow search >> Save.

Activity3: Create Task Object

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
 1. Enter the label name>> Task
 2. Plural label name>> Tasks
 3. Enter Record Name Label and Format
 - Record Name >> Task Name
 - Data Type >> Text
2. Click on Allow reports and Track Field History,Allow Activities
3. Allow search >> Save.

Activity4: Create Volunteer Object

To create an object:

1. From the setup page >> Click on Object Manager>> Click on Create >> Click on Custom Object.
 1. Enter the label name>> Volunteer
 2. Plural label name>> Volunteers
 3. Enter Record Name Label and Format
 - Record Name >> Volunteer Name
 - Data Type >> Text
2. Click on Allow reports and Track Field History, Allow Activities
3. Allow search >> Save.

Activity5: Create Execution Details Object

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
 1. Enter the label name >> Execution Detail
 2. Plural label name >> Execution Details
 3. Enter Record Name Label and Format
 - Record Name >> Execution Detail Name
 - Data Type >> Text
2. Click on Allow reports and Track Field History, Allow Activities
3. Allow search >> Save.

Phase 3: Project Design

Milestone 1: Tabs

What is a Tab in Salesforce?

A **Tab** in Salesforce is like a **shortcut or navigation link** that allows users to access a specific **object, record, or web page** easily from the main Salesforce interface.

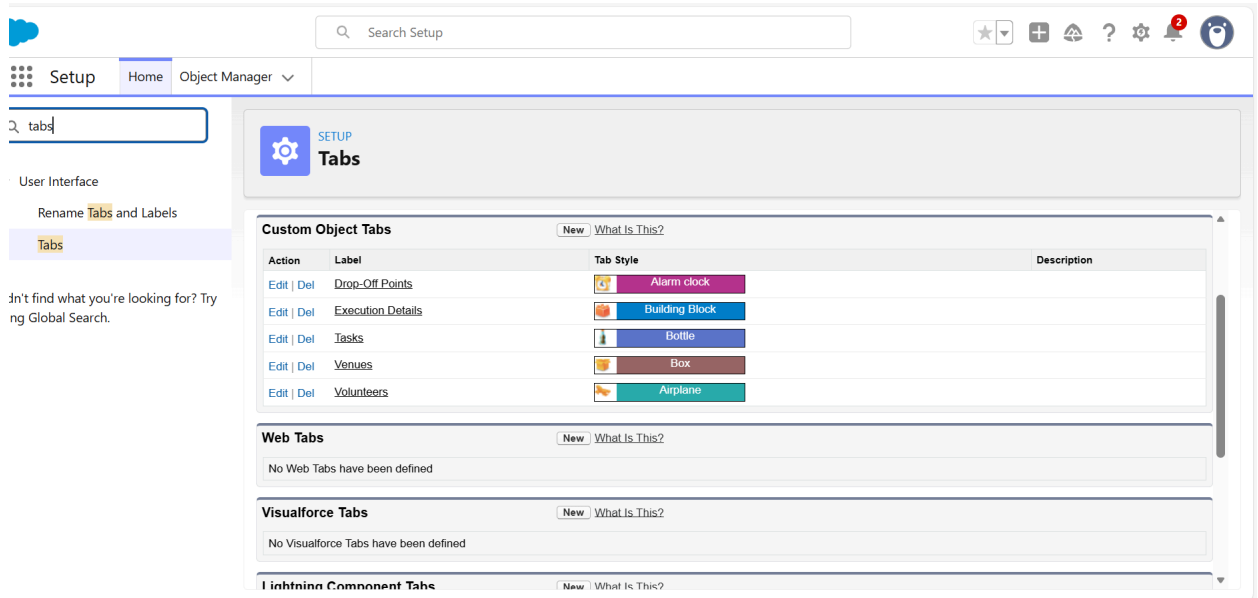
Types of Tabs in Salesforce

| Type | Description | Example |
|----------------------------|---|---|
| Object Tabs | Display data from standard or custom objects . | "Accounts," "Contacts," "Food Donations," "Volunteers." |
| Web Tabs | Display an external webpage inside Salesforce. | A tab showing your NGO's website or Google Maps. |
| Visualforce Tabs | Show a custom Visualforce page (used by developers). | A custom donation summary page. |
| Lightning Page Tabs | Display a Lightning app page built with components. | A dashboard or analytics tab. |

Activity1: Creating a Custom Tab

To create a Tab:(Venue)

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



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

Activity 2: Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are "Drop-Off Point, Task, Volunteer, Execution Details".
2. Follow the same steps as mentioned in Activity -1 .

Milestone 2 :The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps gives users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

Use Case:

Well done you have reached close to your requirement by creating the objects to store the organisation's data. Making a database for an organisation is just not enough to reach out the requirements, the task is how the users at the organisation can access the objects you have created for them. As an Admin for the organisation it's your duty to make sure every user of the organisation is able to access the data modelling structure.

Activity 1 :Create a Lightning App

To create a lightning app page:

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

Search Setup

Setup Home Object Manager

app manager

Apps

App Manager

External Client Apps

External Client App Manager

Lightning Out 2.0 Apps

Lightning Out 2.0 App Manager

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

Lightning Experience App Manager

New Lightning App New External Client App

28 items • Sorted by App Name • Filtered by All app menu items - TabSet Type, App Type

| | App Name | Developer ... | Description | Last Modified ... | App Type | Vi... |
|----|------------------|---------------|---|-----------------------|-----------|-------|
| 1 | All Tabs | AllTabSet | | 10/22/2025, 6:27 A... | Classic | |
| 2 | Analytics Studio | Insights | Build CRM Analytics dashboards and apps | 10/22/2025, 6:27 A... | Classic | ✓ |
| 3 | App Launcher | AppLauncher | App Launcher tabs | 10/22/2025, 6:27 A... | Classic | ✓ |
| 4 | Approvals | Approvals | Manage approvals and approval flows | 10/22/2025, 6:27 A... | Lightning | ✓ |
| 5 | Automation | FlowsApp | Automate business processes and repetitive tas... | 10/22/2025, 6:34 A... | Lightning | ✓ |
| 6 | Bolt Solutions | LightningBolt | Discover and manage business solutions design... | 10/22/2025, 6:27 A... | Lightning | ✓ |
| 7 | Community | Community | Salesforce CRM Communities | 10/22/2025, 6:27 A... | Classic | ✓ |
| 8 | Content | Content | Salesforce CRM Content | 10/22/2025, 6:27 A... | Classic | ✓ |
| 9 | Data Cloud | Audience360 | Build a thorough and complete understanding ... | 10/22/2025, 6:27 A... | Lightning | ✓ |
| 10 | Data Manager | DataManager | Use Data Manager to view limits, monitor usag... | 10/22/2025, 6:27 A... | Lightning | ✓ |

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

App Name : FoodConnect

Developer Name : This will auto populated

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

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

The screenshot shows the 'New Lightning App' setup page. The title is 'New Lightning App'. Below it is the section 'App Details & Branding' with the instruction: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' The page is divided into two main columns: 'App Details' and 'App Branding'. In the 'App Details' column, there are three fields: '* App Name' with a placeholder 'Name your app...', '* Developer Name' with a placeholder 'Enter a developer name...', and 'Description'. In the 'App Branding' column, there is an 'Image' section with an 'Upload' button and a 'Primary Color Hex' section with a color picker (showing blue) and a text box containing '#0070D2'. At the bottom, there is a progress bar with four steps, the first of which is active. A 'Next' button is located at the bottom right.

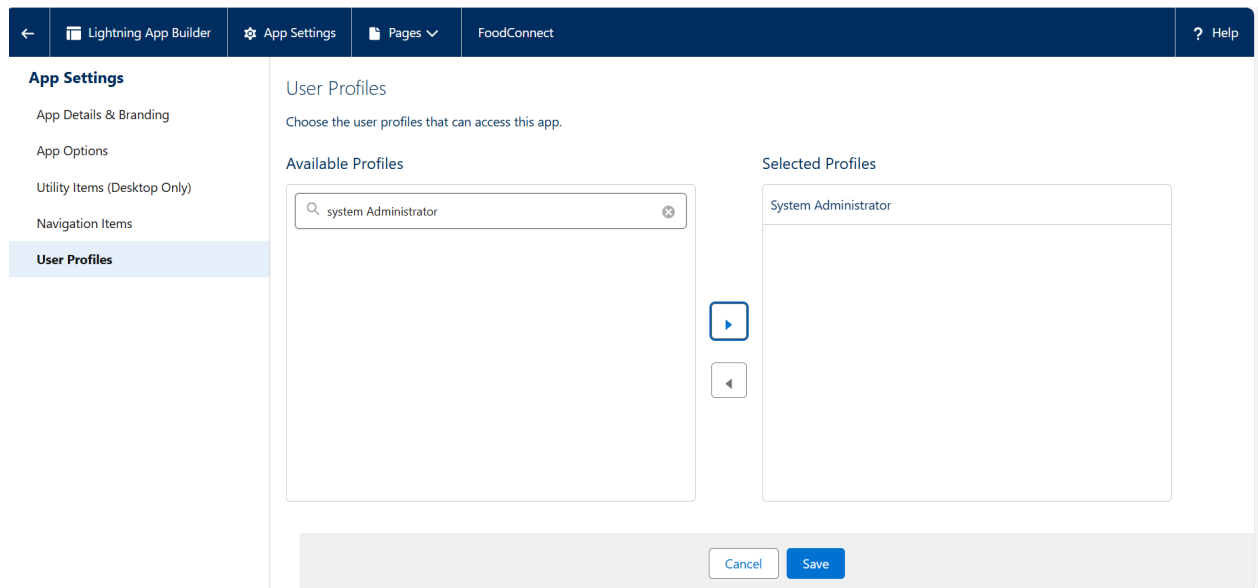
4. (Utility Items) keep it as default >> Next.

5. To Add Navigation Items:

The screenshot shows the 'Navigation Items' configuration page in the Lightning App Builder. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'FoodConnect'. The left sidebar shows 'App Settings' with sub-items: 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items' (selected), and 'User Profiles'. The main content area is titled 'Navigation Items' and includes the instruction: '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.' Below this, there are two panels: 'Available Items' and 'Selected Items'. The 'Available Items' panel has a search bar and a list of items: 'Accounts', 'Action Hub', 'Activation Targets', 'Activations', 'All Sites', 'Alternative Payment Methods' (highlighted), and 'Analytics'. The 'Selected Items' panel shows a list of items: 'Home', 'Venues', 'Drop-Off Points', 'Tasks', 'Execution Details', 'Reports', 'Volunteers', and 'Dashboards'. Arrows between the panels allow for moving items back and forth.

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

6. To Add User Profiles:



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

Milestone 3 : Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields

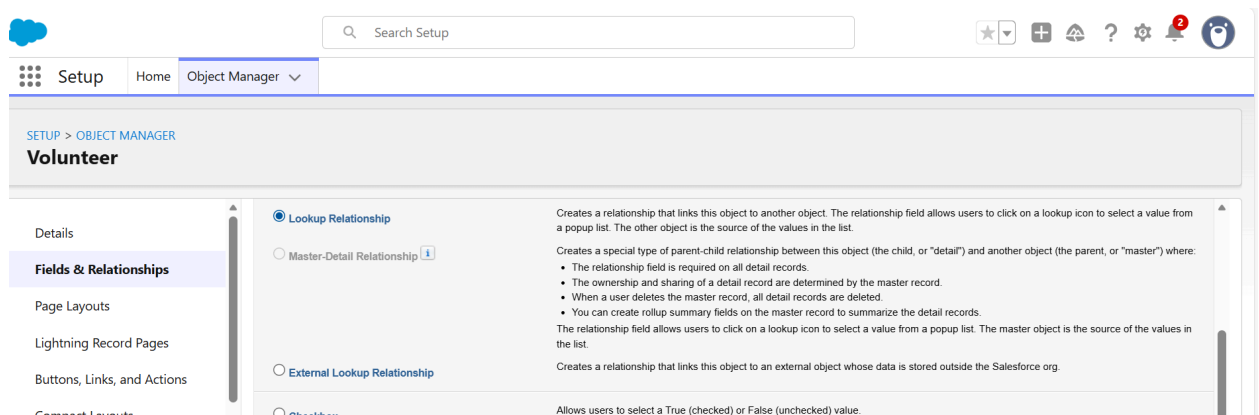
1. **Standard Fields:** As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are, >> Created By >> Owner >> Last Modified >> Field Made During object Creation¹⁵
2. **Custom Fields:** On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use the

necessary. It means you need not always include them in the records, unlike Standardfields.Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

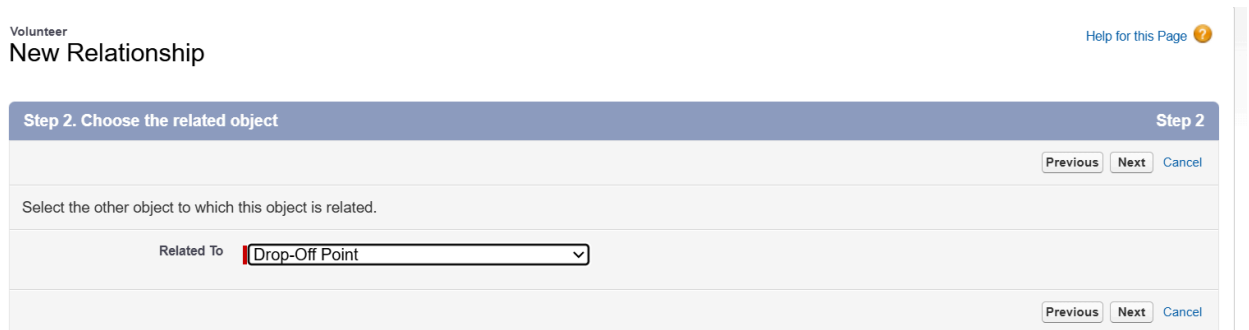
Activity 1 :Creation of Relationship fields in objects

Creation of Lookup Relationship Field on Volunteer Object :

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



2. Now click on “Fields & Relationships” >> New
3. Select Master Detail relationship
4. Select the related object “Drop-Off point” and click next.



5. Field Name : Drop_Off_point
6. Field label : Auto generated
7. Next >> Next >> Save.

Creation of Master Detail Relationship Field on Execution Details Object :

8. Go to setup >> click on Object Manager >> type object name(Execution Details) in the search bar >> click on the object.
9. Now click on “Fields & Relationships” >> New

10. Select Master Detail relationship
11. Select the related object "Volunteer" and click next.
12. Field Name : Volunteer
13. Field label : Auto generated
14. Next >> Next >> Save.

Creation of Master Detail Relationship Field on Execution Details Object :

15. Go to setup >> click on Object Manager >> type object name(Execution Details) in the search bar >> click on the object.
16. Now click on "Fields & Relationships" >> New
17. Select Master Detail relationship
18. Select the related object "Task" and click next.
19. Field Name : Task
20. Field label : Auto generated
21. Next >> Next >> Save.

Creation of Lookup Relationship Field on Drop-Off Point Object :

22. Go to setup >> click on Object Manager >> type object name(Drop-Off Point) in the search bar >> click on the object.
23. Now click on "Fields & Relationships" >> New
24. Select Lookup relationship
25. Select the related object "Venue" and click next.
26. Field Name : Venue
27. Field label : Venue__c
28. Next >> Next >> Save.

Creation of Lookup Relationship Field on Task Object :

29. Go to setup>> click on Object Manager >> type object name(Task) in the search bar >> click on the object.
30. Now click on "Fields & Relationships" >> New
31. Select Lookup relationship
32. Select the related object "Venue" and click next.
33. Field Name : Sponsored By
34. Field label : Auto generated
35. Next >> Next >> Save.

Creation of Lookup Relationship Field on Task Object :

36. Go to setup>> click on Object Manager >> type object name(Task) in the search bar >> click on the object.
37. Now click on "Fields & Relationships" >> New
38. Select Lookup relationship
39. Select the related object "Drop-Off point" and click next.
40. Field Name : Drop-Off point
41. Field label : Auto generated
42. Next >> Next >> Save.

Creation of Lookup Relationship Field on Task Object :

29. Go to setup>> click on Object Manager >> type object name(Task) in the search bar >> click on the object.
30. Now click on "Fields & Relationships" >> New
31. Select Lookup relationship
32. Select the related object "Venue" and click next.
33. Field Name : Sponsored By
34. Field label : Auto generated
35. Next >> Next >> Save.

Creation of Lookup Relationship Field on Task Object :

36. Go to setup>> click on Object Manager >> type object name(Task) in the search bar >> click on the object.
37. Now click on "Fields & Relationships" >> New
38. Select Lookup relationship
39. Select the related object "Drop-Off point" and click next.
40. Field Name : Drop-Off point
41. Field label : Auto generated
42. Next >> Next >> Save.

Activity 2 : Creation of fields for the Venue object

1. Go to setup>> click on Object Manager >> type object name(Venue) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as a "Email" and Click on Next
4. Fill the Above as following:
 - Field Label : Contact Email
 - Field Name : Contact Email

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

To create another fields in an object:

5. Go to setup >> click on Object Manager >> type object name(Venue) in search bar >> click on the object.
6. Now click on “Fields & Relationships” >> New
7. Select Data type as a “Phone” and Click on Next
8. Fill the Above as following:
 - Field Label : Contact Phone
 - Field Name : Contact Phone
 - Click on required check box
 - Click on Next >> Next >> Save and new.

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Venue) in search bar >>click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Geolocation” and Click on Next
4. Fill the Above as following:
 - Field Label : Location
 - Decimal Places : 4
 - Field Name : Location
 - Description : Enter the Geolocation of your Venue
 - Click on Next >> Next >> Save and new.

To create another fields in an object:

9. Go to setup >> click on Object Manager >> type object name(Venue) in search bar >> click on the object.
10. Now click on “Fields & Relationships” >> New
11. Select Data type as a “Long Text Area” and Click on Next
12. Fill the Above as following:
 - Field Label : Venue Location
 - Field Name : Venue_Location
 - Click on Next >> Next >> Save and new.

Activity 3: Creation of fields for the Drop-Off point object

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

2. Now click on “Fields & Relationships” >> New

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

4. Fill the Above as following:

- Field Label : Location 2
- Field Name : gets auto generated
- Description : Enter the Geolocation of the Drop off Point
- Geolocation Options : select Decimal
- Decimal Places : 4
- Click on Next >> Next >> Save and new.

To create another fields in an object:

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

2. Now click on “Fields & Relationships” >> New

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

4. Fill the Above as following:

- Field Label : distance calculation
- Field Name : distance_calculation
- Formula Return Type : Number
- Formula Options : `DISTANCE(Location_2__c , Venue__r.Location__c , 'km')`
- Click on Next >> Next >> Save and new.

Formula Options

Formula Return Type: **Number** ▼

Decimal Places: **4** ▼

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.
Example: Fahrenheit = 1.8 * Celsius__c + 32 [More Examples...](#)

Simple Formula | **Advanced Formula**

Select Field Type: **Drop-Off Point** ▼ | Insert Field: **-- Insert Merge Field --** ▼ | **Insert Operator** ▼

distance calculation (Number) =
`DISTANCE(Location_2__c , Venue__r.Location__c , 'km')`

Quick Tips
Getting Started
Operators & Functions

To create another fields in an object:

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

6. Now click on “Fields & Relationships” >> New

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

8. Fill the Above as following:

- Field Label : State
- Field Name : State
- Enter values, with each value separated by a new line :

Andhra Pradesh
Arunachal Pradesh
Assam
Bihar
Chhattisgarh
Goa
Gujarat
Haryana
Himachal Pradesh
Jharkhand
Karnataka
Kerala
Maharashtra
Madhya Pradesh
Manipur
Meghalaya
Mizoram
Nagaland
Odisha
Punjab
Rajasthan
Sikkim
Tamil Nadu
Tripura
Telangana
Uttar Pradesh
Uttarakhand
West Bengal
Andaman & Nicobar (UT)
Chandigarh (UT)
Dadra & Nagar Haveli and Daman & Diu (UT)
Delhi [National Capital Territory (NCT)]
Jammu & Kashmir (UT)
Ladakh (UT)
Lakshadweep (UT)
Puducherry (UT)

- Click on required check box

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

To create another fields in an object:

9. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
10. Now click on “Fields & Relationships” >> New
11. Select Data type as a “Number” and Click on Next
12. Fill the Above as following:
 - Field Label : Distance
 - Field Name : Distance
 - Length : 14
 - Decimal Places : 4
 - Click on required check box
 - Click on Next >> Next >> Save and new.

Activity 4: Creation of fields for the Task object

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

2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Auto Number” and Click on Next
4. Fill the Above as following:
 - Field Label : Task ID
 - Display Format : TASK-{0}
 - Starting Number : 1
 - Field Name : gets auto generated
 - Click on required check box
 - Click on Next >> Next >> Save and new.

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Date” and Click on Next
4. Fill the Above as following:
 - Field Label : Date
 - Field Name : Date
 - Click on required check box
 - Click on Next >> Next >> Save and new.

To create another fields in an object:

5. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
6. Now click on "Fields & Relationships" >> New
7. Select Data type as a "Picklist (Multi-Select)" and Click on Next
8. Fill the Above as following:
 - Field Label : Food Category
 - Field Name : Food Category
 - Enter values, with each value separated by a new line :
Veg
Non-Veg
Salad
Snack
 - Click on required check box
 - Click on Next >> Next >> Save and new.

To create another fields in an object:

9. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
10. Now click on "Fields & Relationships" >> New
11. Select Data type as a "Number" and Click on Next
12. Fill the Above as following:
 - Field Label : Number of People Served
 - Field Name : Number_of_People_Served
 - Click on required check box
 - Click on Next >> Next >> Save and new.

To create another fields in an object:

13. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
14. Now click on "Fields & Relationships" >> New
15. Select Data type as a "Text" and Click on Next
16. Fill the Above as following:
 - Field Label : Name of the Person
 - Field Name : Name_of_the_Person
 - Click on Next >> Next >> Save and new.

To create another fields in an object:

17. Go to setup>> click on Object Manager >> type object name(Task) in search bar >> click on the object.
18. Now click on “Fields & Relationships” >> New
19. Select Data type as a “Phone” and Click on Next
20. Fill the Above as following:
 - Field Label : Phone
 - Field Name : Phone
 - Click on Next >> Next>> Save and new.

To create another fields in an object:

21. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
22. Now click on “Fields & Relationships” >> New
23. Select Data type as a “Pick List” and Click on Next
24. Fill the Above as following:
 - Field Label : Rating
 - Field Name : Rating
 - Enter values, with each value separated by a new line :
1
2
3
4
5
 - Click on Next >> Next >> Save and new.

To create another fields in an object:

25. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
26. Now click on “Fields & Relationships” >> New
27. Select Data type as a “Long Text Area” and Click on Next
28. Fill the Above as following:
 - Field Label : Feedback
 - Field Name : Feedback
 - Click on Next >> Next >> Save and new.

Activity 5: Creation of fields for the Volunteer object

1. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Auto Number” and Click on Next
4. Fill the Above as following:
 - Field Label : Volunteer ID
 - Field Name : gets auto generated
 - Click on required check box
 - Click on Next >> Next >> Save and new.
 - Click on Next >> Next >> Save and new.

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Picklist” and Click on Next
4. Fill the Above as following:
 - Field Label : Gender
 - Field Name : Gender
 - Enter values, with each value separated by a new line :
Female
Male
 - Click on Next >> Next >> Save and new.

To create another fields in an object:

5. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
6. Now click on “Fields & Relationships” >> New
7. Select Data type as a “Date” and Click on Next
8. Fill the Above as following:
 - Field Label : Available On

- Field Name : Available On
- Click on required check box
- Click on Next >> Next >> Save and new.

To create another fields in an object:

9. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
10. Now click on “Fields & Relationships” >> New
11. Select Data type as a “Number” and Click on Next
12. Fill the Above as following:
 - Field Label : Age
 - Field Name : Age
 - Click on required check box
 - Click on Next >> Next>> Save and new.

To create another fields in an object:

13. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
14. Now click on “Fields & Relationships” >> New
15. Select Data type as a “Email” and Click on Next
16. Fill the Above as following:
 - Field Label : Email
 - Field Name : Email
 - Click on required check box
 - Click on Next>> Next >> Save and new.

To create another fields in an object:

17. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
18. Now click on “Fields & Relationships” >> New
19. Select Data type as a “Number” and Click on Next
20. Fill the Above as following:
 - Field Label : Contact Number
 - Field Name : Contact_Number
 - Click on required check box
 - Click on Next >> Next >> Save and new.

To create another fields in an object:

21. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
22. Now click on “Fields & Relationships” >> New
23. Select Data type as a “Text Area (Long)” and Click on Next
24. Fill the Above as following:
 - Field Label : Address
 - Field Name : Address
 - Click on Next >> Next >> Save and new.

To create another fields in an object:

25. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
26. Now click on “Fields & Relationships” >> New
27. Select Data type as a “Date” and Click on Next
28. Fill the Above as following:
 - Field Label : Date of Birth
 - Field Name : Date_of_Birth
 - Click on Next >> Next >> Save and new.

Activity 6: Creation of fields for the Execution

Details object

- 1.Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Auto Number” and Click on Next
4. Fill the Above as following:
 - Field Label : Execution ID
 - Field Name : gets auto generated
 - Click on required check box
 - Click on Next >> Next >> Save and new.

Milestone 4: Flows

A **Flow** in Salesforce is an **automation tool** that lets you perform actions and process logic **without writing code**.

It helps you **collect data, update records, send notifications, assign tasks**, and **automate repetitive processes** visually — through a drag-and-drop interface in the **Flow Builder**.

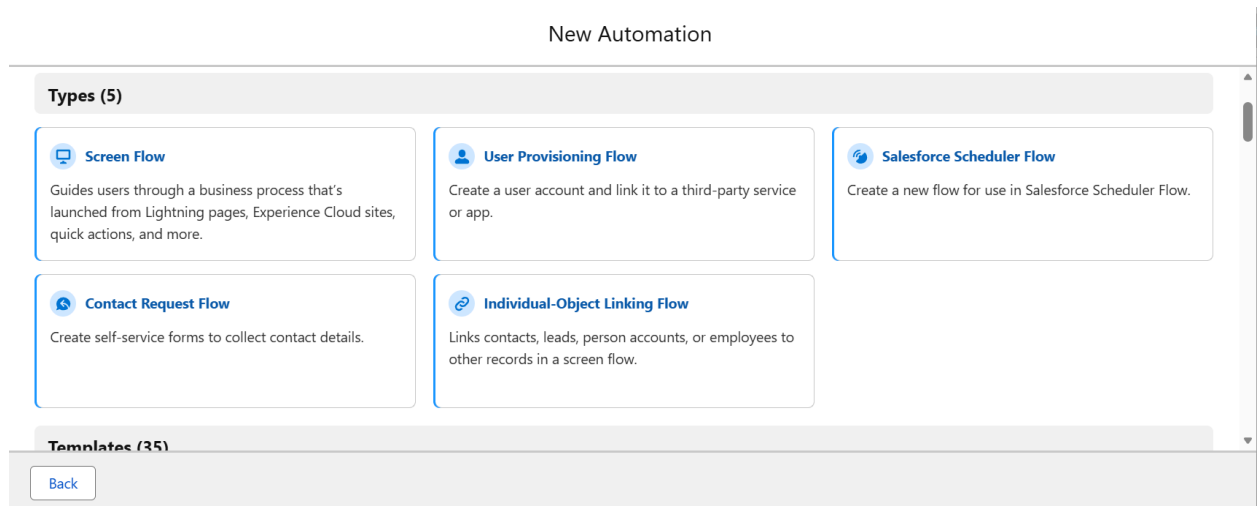
Flows are part of **Salesforce Automation Tools**, which also include Workflow Rules and Process Builder, but **Flows are more powerful and flexible**.

Types of Flows in Salesforce

| Type of Flow | Description | Example (in Food Supply System) |
|------------------------------|---|--|
| Record-Triggered Flow | Runs automatically when a record is created, updated, or deleted. | When a new <i>Food Donation</i> is created, automatically assign it to an available volunteer. |
| Scheduled Flow | Runs at a specific time or interval. | Every day at 10 PM, generate a report of total food delivered. |
| Screen Flow | Displays screens to users for input (interactive). | Donor fills out a form to register a food donation. |
| Auto-Launch Flow | Runs in the background when invoked by another process or Flow. | Send an SMS or email to a volunteer after a donation is assigned. |

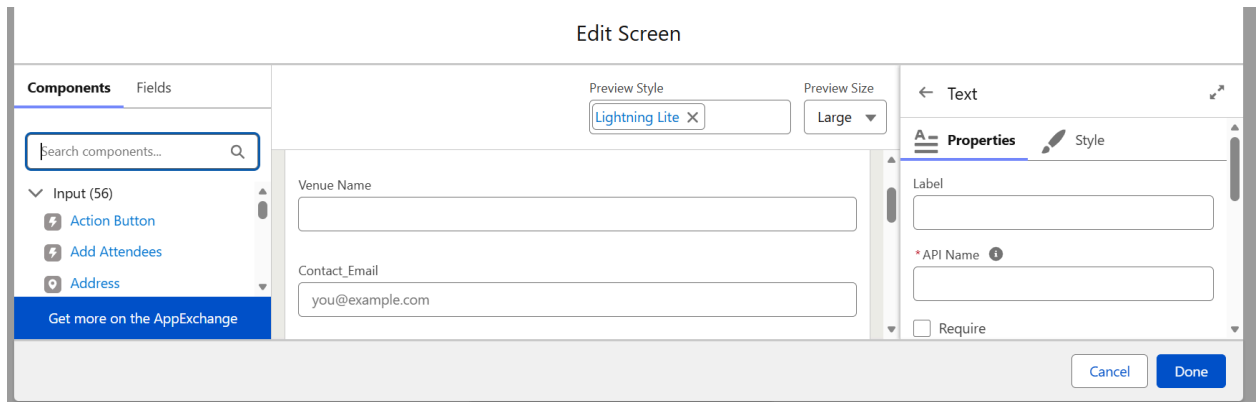
Activity 1: Create Flow to create a record in Venue object

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



3. Click on the '+' icon in between start and end, and click on screen element.
4. Under the Screen Properties:
 - Label : Venue Details
 - API Name : Venue_Details
5. Now lets add components in this flow. Click on Text Component and name it as:
 - Label : Venue Name
 - API Name : Venue_Name
6. Click on Email Component and name it as:
 - Label : 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

Milestone 5: Trigger

What is a Trigger in Salesforce?

A **Trigger** in Salesforce is a piece of **Apex code** (Salesforce's programming language) that **automatically runs when certain actions occur** in the database — such as when a record is **created, updated, deleted, or undeleted**.

In simple terms:

A **Trigger** tells Salesforce “*when something happens to this data, automatically do this action.*”

Purpose of a Trigger

Triggers are used to:

- Automate actions **behind the scenes**.
- Enforce **business rules** and **data consistency**.
- Perform **complex logic** that cannot be done using Flows or Process Builder alone.
- Handle **related record updates** or **custom calculations**.

When Triggers Run

Triggers can run **before** or **after** a record change:

| Type | When It Runs | Typical Use |
|-----------------------|---|--|
| Before Trigger | Runs before data is saved to the database. | Validate or modify data (e.g., check expiry date before saving a food donation). |
| After Trigger | Runs after data is saved to the database. | Perform actions on related records (e.g., create a delivery record after a donation is saved). |

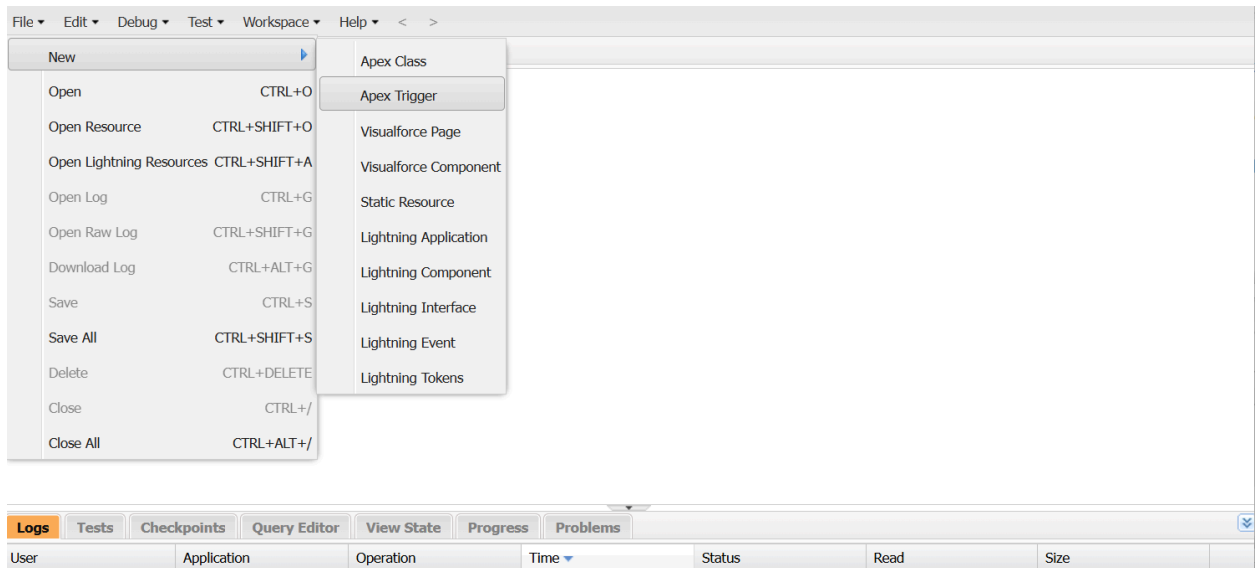
Example Triggers in the Leftover Food Supply System

| Trigger Name | Event | Purpose |
|----------------------------------|---------------|---|
| DonationAssignmentTrigger | After Insert | Assigns the nearest volunteer automatically when a donation is created. |
| DonationValidationTrigger | Before Insert | Checks that the food expiry date is valid and quantity > 0. |

| | | |
|------------------------------|-----------------|--|
| DeliveryUpdateTrigger | After Update | Sends a notification to the beneficiary when delivery status changes to "Delivered." |
| FeedbackTrigger | After Insert | Notifies the admin when new feedback is received. |

Activity 1: Create a Trigger

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



New Apex Trigger

Name:

sObject: ▼

Submit

5. Enter Name : DropOffTrigger
sObject: Drop-Off Point
6. Click on Submit.

Activity 2: Trigger Code

(This Trigger is to assign Distance field to the Distance Calculation field. So that we can assign the distance in the sharing rules.)

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;  
    }  
}
```

Milestone 8: Profiles

What Is a Profile in Salesforce?

A **Profile** defines:

- What **objects** a user can access (like Leads, Accounts, Opportunities, etc.)
- What **fields** they can view or edit
- What **permissions** they have (create, read, edit, delete)
- What **apps, tabs, and records** they can use

Every user must have one Profile in Salesforce.

Types of Profiles in Salesforce

Salesforce provides **two categories** of profiles:

1. Standard Profiles

These come **built-in** with Salesforce.

You can **view** them but have **limited ability to modify** them.

Common standard profiles include:

| Profile Name | Description |
|--------------|-------------|
|--------------|-------------|

| | |
|--|---|
| System Administrator | Full access to all data, setup, and configuration. Can manage users, objects, and security. |
| Standard User | Can view, edit, and delete records they own. Has access to standard apps and tabs. |
| Read Only | Can view records but not edit, delete, or create. |
| Marketing User | Can manage campaigns, import leads, and has extra marketing permissions. |
| Solution Manager | Manages Solutions (knowledge base articles). |
| Contract Manager | Can manage and approve contracts. |
| Chatter Free / Chatter Moderator User | For internal communication in Chatter only. |

Activity 1: Profiles

1. Go to setup page >> type Profiles in Quick Find bar >> click on Profiles >> click on 'S'
2. Click on Clone beside Standard Platform User.
3. Under Clone Profile:
Profile Name : NGOs Profile
1. Then click on Save

Milestone 9: Creation of User

What is creation of user in Salesforce?

- It defines **who** can access Salesforce.
- It controls **permissions** and **data access**.
- It allows **tracking** of who creates or updates records.

Every record in Salesforce has “Created by” and “Last Modified by” fields — tied to user accounts like *User1*.

Step 1: Go to Setup Click the **gear icon** (top right corner).

Select **Setup** → this opens the Salesforce Setup page.

Step 2: Find the Users Page

1. In the **Quick Find** search box (left side), type “**Users**”.
2. Click **Users** under **Administration** → **Users**.

Step 3: Click “New User”

- Click the “**New User**” button at the top.

Activity 1: Creation of User1

1. Go to setup page >> type users in Quick Find bar >> click on users>> New user.
2. In General Information give details as: (Note : create users as per your wish NGO's)

First Name : Iksha Foundation

Last Name : Iksha_Foundation

Alias : iiksh

Email : Give Your Email

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

Nickname : Auto Populated

User License : Salesforce Platform

Profile : NGOs Profile

Active : Check

SETUP Users

New User

[Help for this Page](#)

User Edit Save Save & New Cancel

General Information *= Required Information

| | | | |
|------------|-------------------------|---------------------------|-------------------------------------|
| First Name | Iksha Foundation | Role | <None Specified> |
| Last Name | Iksha_Foundation | User License | Chatter Free |
| Alias | iksh | Profile | --None-- |
| Email | prakashgunacse@gmail.co | Active | <input checked="" type="checkbox"/> |
| Username | prakashguna456789@gma | Marketing User | <input type="checkbox"/> |
| Nickname | User176218296728255 | 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"/> |
| | | Site.com Publisher User | <input type="checkbox"/> |

3. Click on Save

Activity 2: Creation of User2, User3

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

2. Give Different First Name, Last Name based on Different NGO's.

| | | | | | |
|---|-----------------------------------|------|-----------------------------|---|--------------|
| <input type="checkbox"/> Edit | Iksha_Foundation_Iksha_Foundation | IKSN | prakashguna123456@gmail.com | ✓ | NGOs Profile |
| <input type="checkbox"/> Edit | NSS_NSS | nnss | prakashguna09876@gmail.com | ✓ | NGOs Profile |
| <input type="checkbox"/> Edit | Stret cause_Street cause | sstr | prakashguna456789@gmail.com | ✓ | NGOs Profile |

Milestone 10: Public Group

Activity 1: Creation of Public Group 1

1. Go to setup page >> type Public Groups in Quick Find bar >> click on Public Groups >> click on New.
2. Under Group Information:
Label : Iksha
Group Name : Iksha
Grant Access Using Hierarchies : Check
3. In Search, Select Users.
4. In Selected Members Add Iksha Foundation and System Administrator

Activity 2: Creation of Public Group 2

1. By Following Steps in Activity 1, Create other two Public Groups for other two users.
2. After Saving this would look like this.

SETUP

Public Groups

Public Groups

Help for this Page ?

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.

View: All Edit Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other All

| Action | Label ↑ | Group Name | Created By | Created Date |
|--|--------------|--------------|------------|--------------------|
| Edit Del | Iksha | Iksha | G. PRAKASH | 11/3/2025, 5:57 AM |
| Edit Del | NSS | NSS | G. PRAKASH | 11/3/2025, 5:59 AM |
| Edit Del | Street cause | Street_cause | G. PRAKASH | 11/3/2025, 6:00 AM |

Milestone 11: Report Types

What Is a Report Type in Salesforce?

A **Report Type** in Salesforce defines:

- **Which records (objects)** you can see in a report
- **How those objects are related** (e.g., Accounts with Contacts, Opportunities with Products)
- **Which fields** are available to include in your report

Think of a **report type** as the “**data blueprint**” for a report — it tells Salesforce **where the data comes from**.

Types of Report Types in Salesforce

Salesforce has **two main categories** of report types:

1. Standard Report Types

- These are **automatically created** by Salesforce when you create new objects or relationships.

- You **don't have to define them manually**.
- They include common combinations like:
 - Accounts and Contacts
 - Opportunities and Products
 - Cases and Solutions

Example:

“Accounts with Contacts” — shows all accounts that have at least one contact.

Activity 1: 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:
 - Primary Object : Select Venues
 - Report Type Label : Venue with DropOff with Volunteer
 - Report Type Name : Venue_with_DropOff_with_Volunteer
 - Description : Venue with DropOff with Volunteer
 - Store in Category : Select Other Reports
 - Deployment Status : Deployed
3. Click on Next
4. Near Click to relate another Object Select Drop-Off Points.
5. And also select "A" records may or may not have related "B" records.
6. Now again Near Click to relate another Object Select Volunteers.
7. Now click on Save.

Milestone 12: Report

What Is a Report in Salesforce?

A **Report** is a **list or summary of Salesforce records** that meet certain criteria. It allows you to **analyze, organize, and visualize your data**.

Think of it as a **dynamic table or chart** that shows the information you need from Salesforce objects like Accounts, Contacts, Opportunities, or Cases.

Key Features of Salesforce Reports

1. **Filter Data** – Only show records you care about (e.g., Opportunities > \$50,000).
2. **Group Records** – Organize data by fields like Stage, Region, Owner.
3. **Summarize** – Calculate totals, averages, counts, etc.
4. **Visualize** – Add charts to reports for easier understanding.
5. **Export** – Download to Excel, CSV, or use in dashboards.

Activity 1: Creation of Report on Venue with DropOff with Volunteer

1. Go to the app(FoodConnect) >> click on the reports tab
2. Click on New Folder.
Folder Label : Custom Reports
Folder Unique Name : CustomReports
3. Open Custom Reports and click on New Report
4. Select Report Type : Venue with DropOff with Volunteer
5. Then click on Start Report.
6. In GROUP ROWS : Add Volunteer Name

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

Outline
Filters 2

Groups

GROUP ROWS
Add group...

Volunteer Name

GROUP COLUMNS
Add group...

Columns

Add column...

Venue Name

Drop-Off point Name

Distance

✓ Previewing a limited number of records. Run the report to see everything.

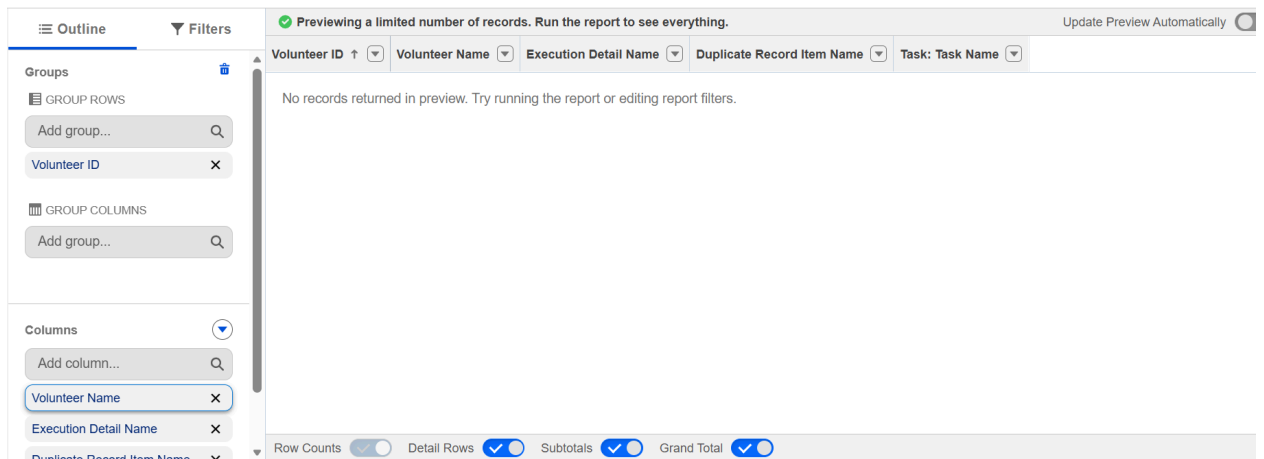
| Volunteer Name ↑ | Venue Name ↑ | Drop-Off point Name | Distance |
|------------------|-------------------------------|---------------------|------------|
| - (4) | La Royale Banquet Hall. | Shapur | 5.1161 |
| | La Royale Banquet Hall. | Jeedimetla | 6,902.9995 |
| | Paradise Garden Function Hall | Suraram Village | 28.2332 |
| | Ujwala Grand | - | - |
| Subtotal | | | 6,936.3488 |
| Total (4) | | | 6,936.3488 |

8. Now click on Save & Run.
9. Give Label as :
10. Report Name : venue and Drop Off point
11. Report Unique Name : Auto Populated
12. Click on Select Folder and select Custom Report, then click on Save.

Activity 2: Creation of Report on Volunteers with Execution Details and Tasks

1. Go to the app(FoodConnect) >> click on the reports tab
2. Click on Custom Reports Folder and click on New Report
3. Select Report Type : Volunteers with Execution Details and Tasks.
4. Then click on Start Report.
5. In GROUP ROWS : Volunteer ID
6. In Columns : Add Volunteer : Volunteer Name, Task : Task Name, Execution Detail :

Execution Detail Name, Volunteer: Owner Name, Task: Date, Task : Rating.



7. Now click on Save & Run.

8. Give Label as :

Report Name : Volunteer Task

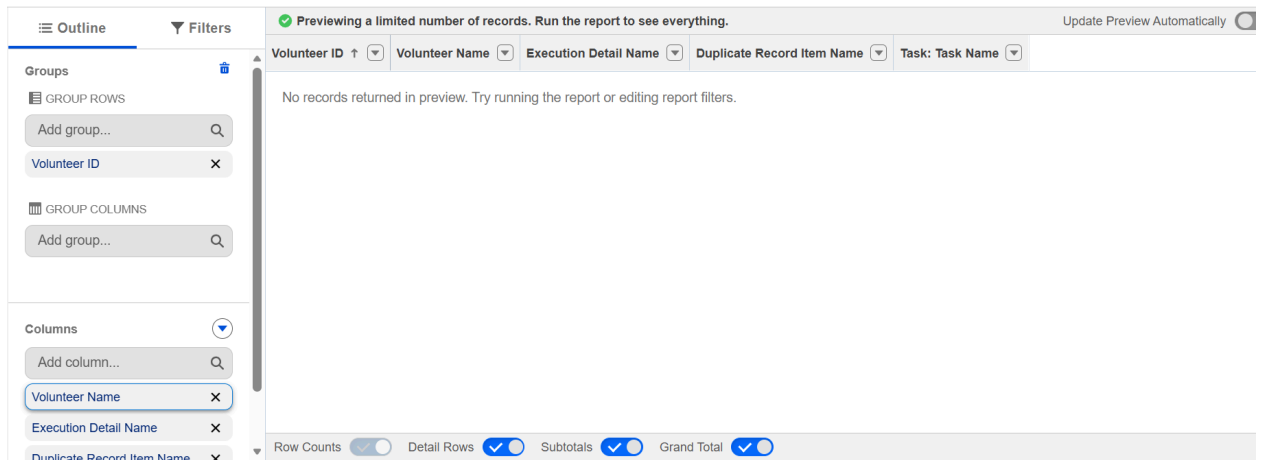
Report Unique Name : Auto Populated

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

Activity 3: Creation of Report on Volunteers with Execution Details and Tasks

1. Go to the app(FoodConnect) >> click on the reports tab
2. Click on Custom Reports Folder and click on New Report
3. Select Report Type : Volunteers with Execution Details and Tasks.
4. Then click on Start Report.
5. In GROUP ROWS : Volunteer ID

6. In Columns : Add Volunteer : Volunteer Name, Task : Task Name, Execution Detail : Execution Detail Name, Volunteer: Owner Name, Task: Date, Task : Rating.



7. Now click on Save & Run.

8. Give Label as :

Report Name : Volunteer Task

Report Unique Name : Auto Populated

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

Milestone 12: Dashboard

What Is a Dashboard in Salesforce?

A **Dashboard** is a **visual display of key Salesforce data** in one place.

It's made up of **components (charts, tables, metrics, gauges, etc.)** that summarize reports.

Think of it as a **control panel** that lets you **monitor your business at a glance**

Key Features of a Salesforce Dashboard

1. **Visualize Data** – Turn report data into charts, graphs, and tables.
2. **Real-Time Updates** – Dashboards update automatically when underlying reports change.
3. **Single View of KPIs** – Track sales, support cases, campaigns, etc., in one screen.
4. **Interactive** – Click on dashboard components to drill into the underlying report.
5. **Shareable** – Share dashboards with your team, role, or profile.

Activity 1: Adding venue and Drop Off point

Report to the Dashboard

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

Folder Label : Custom Dashboards

Folder Unique Name : Auto Populated

3. Open Custom Dashboards and click on New Dashboards
4. Name : Organization Details
5. Click on Widget and select Chart or Table
6. In Select Report : Select venue and Drop Off point Report.
7. Then click on select
8. In Add Component:

Display As : Select Lightning Table

Component Theme : Select Dark (Optional)

venue and Drop Off point Report



+ Widgets

The screenshot shows a dashboard with two widgets. The first widget, titled 'Task Execution Details', displays a table with venue and drop-off point information. The second widget, titled 'Volunteer Task', shows a message indicating no data is available for the chart.

| Venue Name ↑ | Drop-Off point Name |
|-------------------------------|---------------------|
| La Royale Banquet Hall. | Shapur |
| La Royale Banquet Hall. | Jeedimetla |
| Paradise Garden Function Hall | Suraram Village |
| Ujwala Grand | - |

We can't draw this chart because there is no data.

View Report (Volunteer Task)

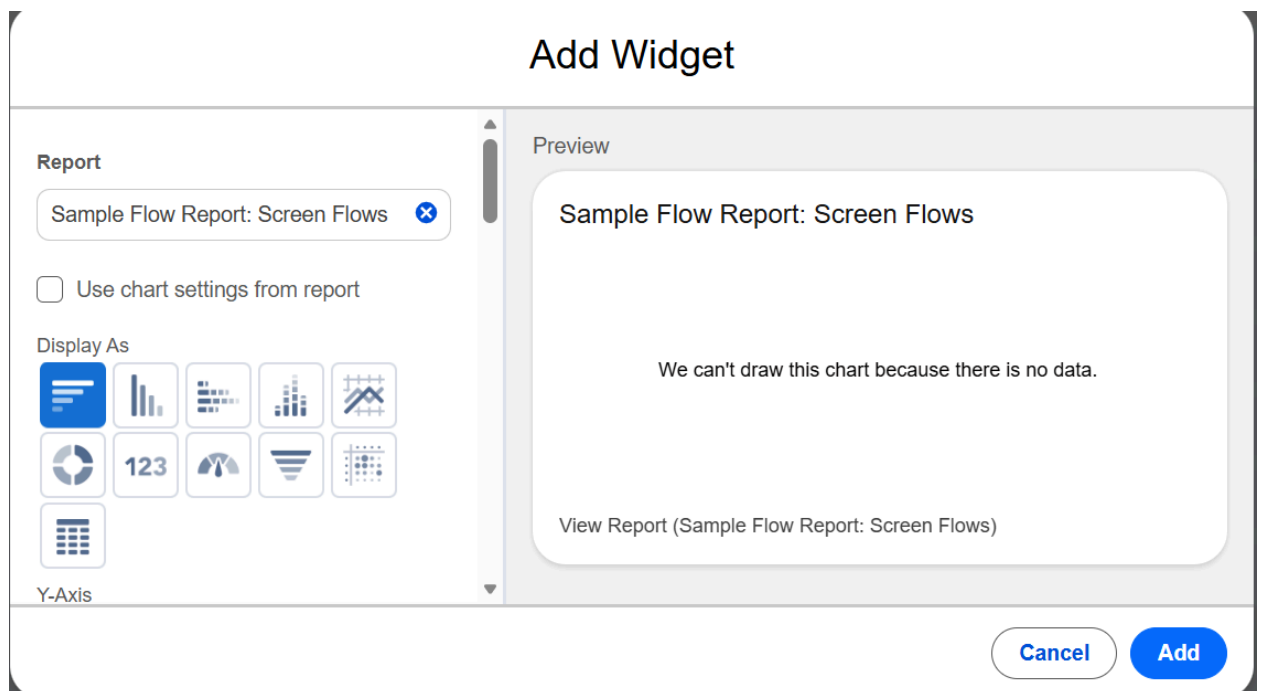
1. Now click on save.

Activity 2: Adding Volunteer Task Report to the Dashboard

1. Click on Widget and select Chart or Table
2. In Select Report : Select Volunteer Task Report.
3. Then click on select
4. In Add Component:

Display As : Select Line Chart

Component Theme : Select Dark (Optional)



1. Now click on save.

Activity 3: Adding a Picture to the Dashboard (Optional)

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

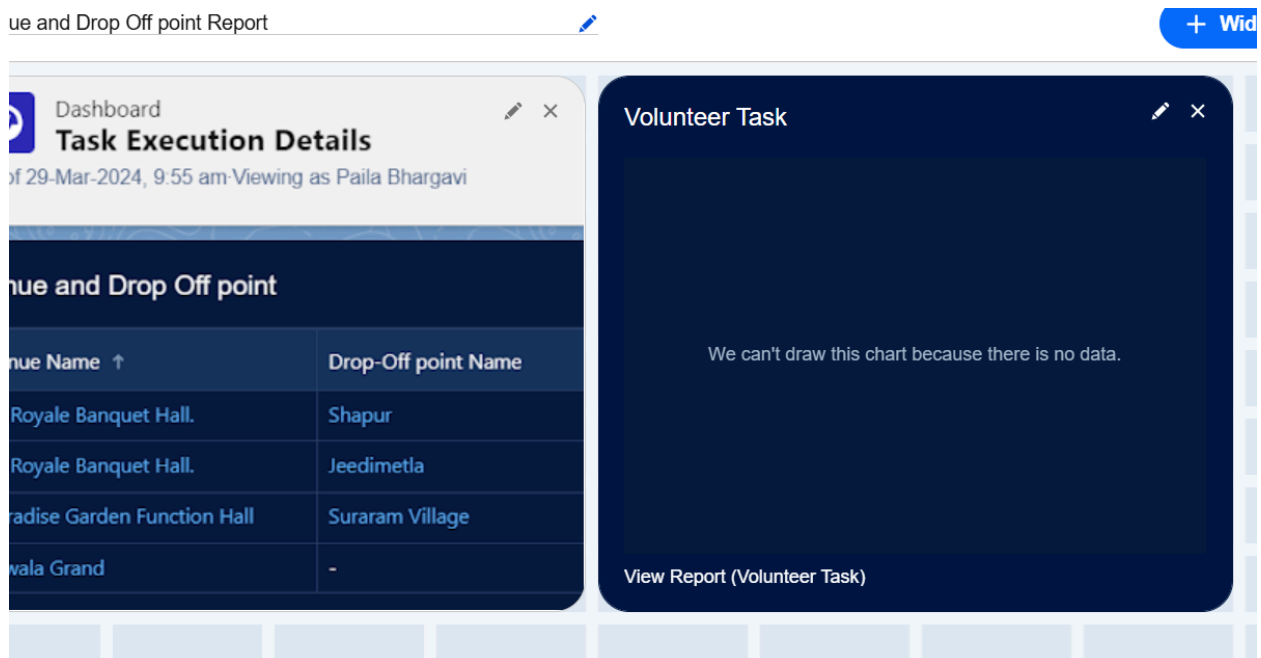
1. Click on Widget and select Image. Then click on Browse Files.
2. Then Select the Picture you want to upload in this Dashboard.
3. Then click on Save As :

Name : Task Execution Details

Click on Select Folder and select Custom Dashboards

4. Click on Select Folder and then Save.

ue and Drop Off point Report



Milestone 13: Sharing Rules

What Are Sharing Rules in Salesforce?

Sharing Rules are a way to **automatically grant additional access** to records to users **beyond their profile permissions**.

They are part of Salesforce's **record-level security model**, which controls **who can see or edit which records**.

Think of it as saying:

“Profiles give baseline access, but Sharing Rules let me open access for specific groups or roles when needed.”

Types of Sharing Rules

1. Owner-Based Sharing Rules

- Share records **owned by specific users or roles** with other users, roles, or groups.
 - Example:
 - Share all Opportunities owned by Sales Rep role **with the Sales Manager role**.
-

2. Criteria-Based Sharing Rules

- Share records that **meet certain conditions** with other users, roles, or groups.
- Example:
 - Share all Accounts where **Industry = "Technology"** with the Technology Sales team

Creation of sharing rules

1. Go to setup >> type Sharing Settings in quick find box >> Click on the Sharing Settings.
2. Scroll down and find Drop-Off point Sharing Rules.
3. Click on new near Drop-Off point Sharing Rules and Name it as:
Label : Rule 1
Rule Name : Rule_1
4. Select your rule type : Select Based on criteria.
5. Select which records to be shared:
Field : Operator : Value = Distance : less than : 15
6. Select the users to share with : Near Share With
Public Groups : Iksha
7. Click on Save.
8. Click on new near Drop-Off point Sharing Rules and Name it as:
Label : Rule 2
Rule Name : Rule_2

9. Select your rule type : Select Based on criteria.
10. Select which records to be shared:
Field : Operator : Value = Distance : greater than : 15
Field : Operator : Value = Distance : less or equal : 30
11. Select the users to share with : Near Share With
Public Groups : NSS
12. Click on Save.
13. Click on new near Drop-Off point Sharing Rules and Name it as:
Label : Rule 3
Rule Name : Rule_3
14. Select your rule type : Select Based on criteria.
15. Select which records to be shared:
Field : Operator : Value = Distance : greater than : 30
Field : Operator : Value = Distance : less or equal : 50
16. Select the users to share with : Near Share With
Public Groups : Street Cause
17. Click on Save.

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

Milestone 14: Home page

What Is the Home Page in Salesforce?

The **Home Page** in Salesforce is the **main landing page** a user sees when they log in.

It provides a **snapshot of key information** and acts as a **central hub** to access records, reports, dashboards, tasks, and other tools.

Think of it as your **personalized control center** in Salesforce.

Types of Home Pages

1. **Standard Home Page**

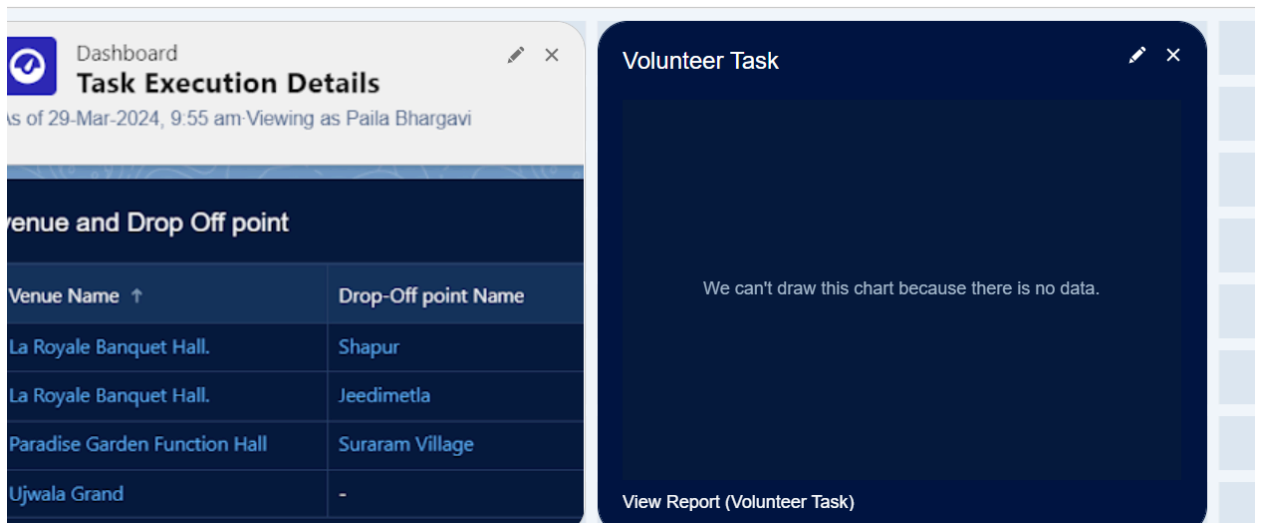
- Default page provided by Salesforce.
- Shows basic components like Tasks, Calendar, Chatter feed.

2. **Custom Home Page**

- Created or modified by Admins using **Lightning App Builder**.
- Allows adding **custom components, charts, dashboards, and links**.
- Can be personalized for different **profiles or roles**.

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
18. 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.

