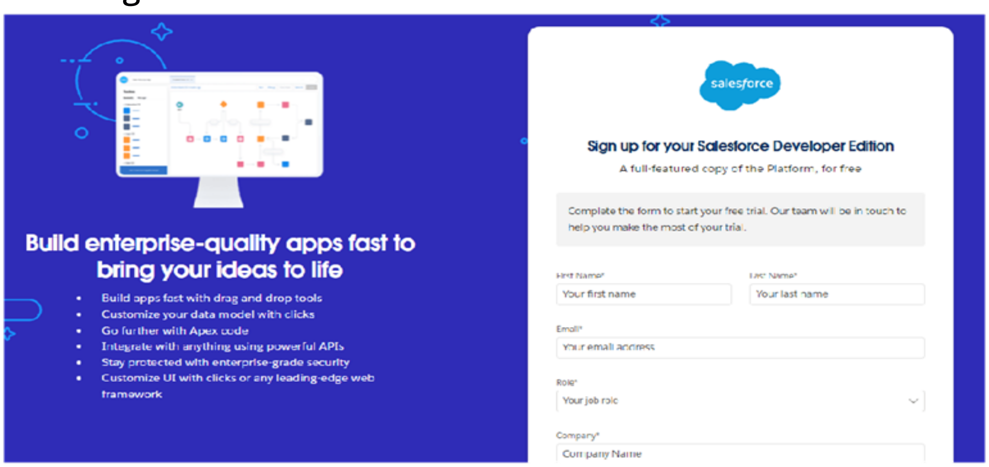
FOOD CONNECT : TO SUPPLY LEFTOVER FOOD TO POOR

Salesforce developer account creation

Creating Developer Account
Creating a developerorg in salesforce.

Go to https://developer.salesforce.com/signup On the signup form, enterthe following details:



a. First name & Last name
b. Email
c. Role : Developer

d. Company : College or Company Name

e. County : India

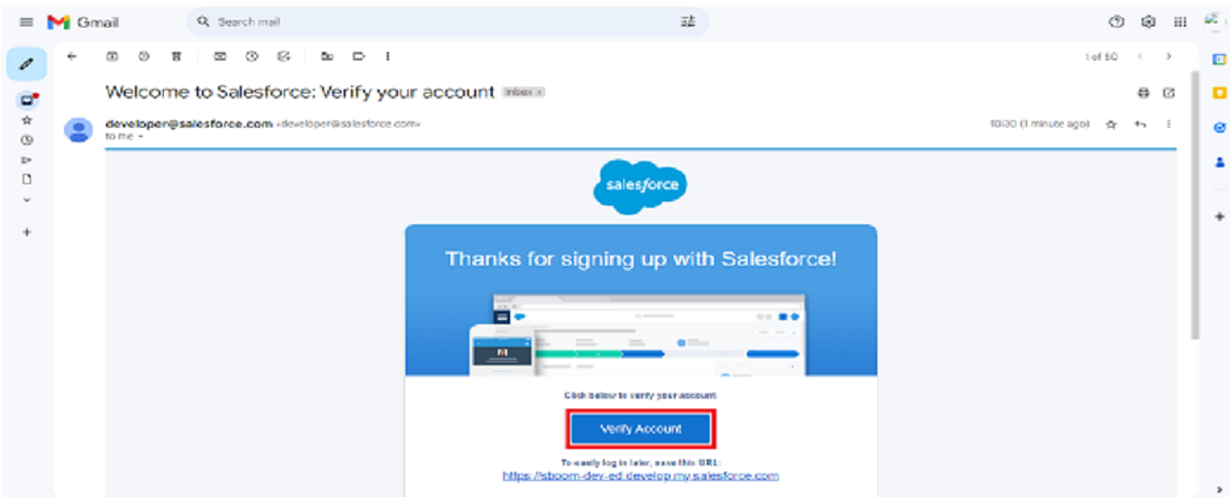
f. Postal Code : pin code

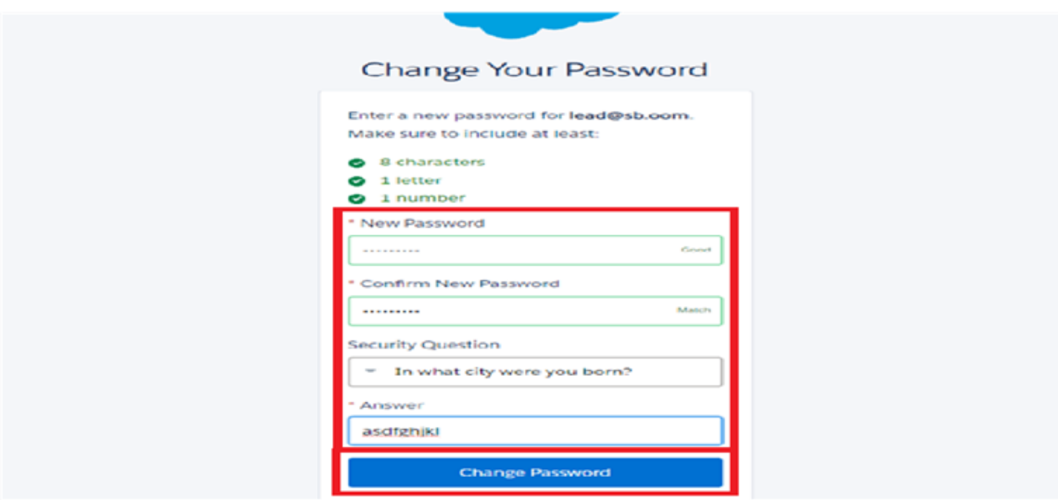
g. Username : should be a combination of your name and companyThis need not be an actual email id, you can give anything in the format : username@organization.com

Click on sign me up afterfilling these.

Account Activation

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

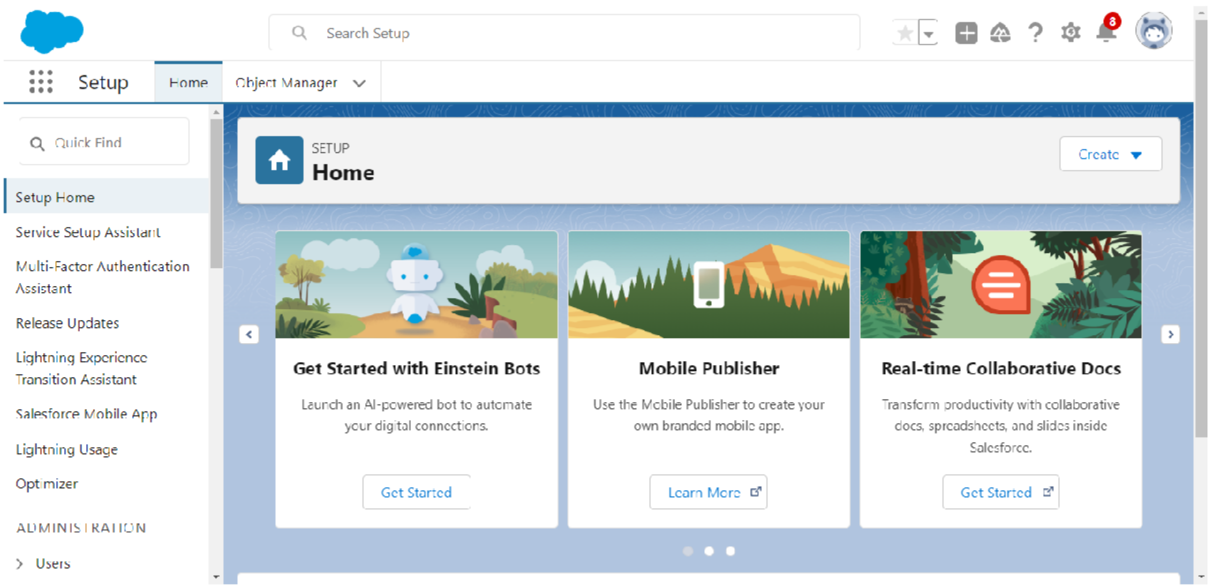




Click on Verify Account

Give a password and answer a securityquestion and clickon change password.

1. Give a password and answer a security questionand click on change password.
2. Then you will redirect to your salesforce setup page.



Object Creation:

What is an Object? How a Custom Object is CreatedObject:

An object in Salesforce is a databasetable that allows you to store information specific to your organization. Objectscan be standard (provided by Salesforce) or custom (createdby users)

Create Venue Object

To create an object:

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

>>Click on Custom Object.

1. Enter the label name >>Venue

2. Plural label name >> Venues

3. Enter RecordName Label and Format

    a. Record Name >> Venue Name

    b. DataType >> Text

1. Click on Allow reports and Track Field History,Allow Activities.

2. Allow search >>Save.

In the same way CreateDrop-Off Point Object,Task Object,Volunteer Object,ExecutionDetail Object.

Tabs Creation:

What is a Tab? How a CustomTab is CreatedTab:

A tab in Salesforce is a user interface component that allows usersto create, view, and edit records for an object. Tabs are associated with standard and custom objectsand can be customized to enhance the user experience.

Creating a Custom Tab:

To create a Tab:(Venue)

    a. Go to setuppage >> type Tabs in Quick Find bar >>click on tabs >>New (undercustom 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. Makesure that the Append tab to users'existing personalcustomizations is checked.

3. Click save

Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “Drop-Off

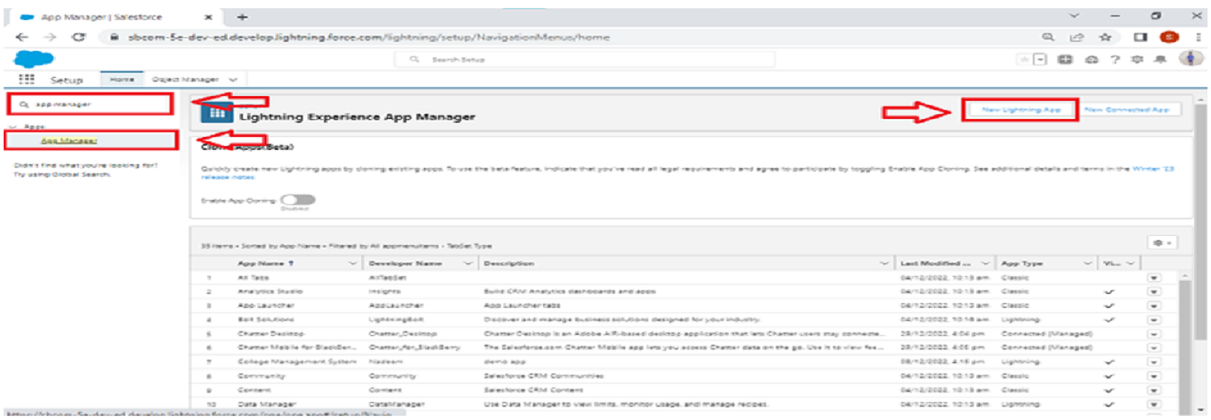
Point, Task, Volunteer, Execution Details".

2. Follow the same steps as mentioned in above activity.

Creating a Lightning App:

To create a lightning app page:

1. Go to setup page >> search "app manager"in quick find >> select "appmanager" >> click on New lightningApp.

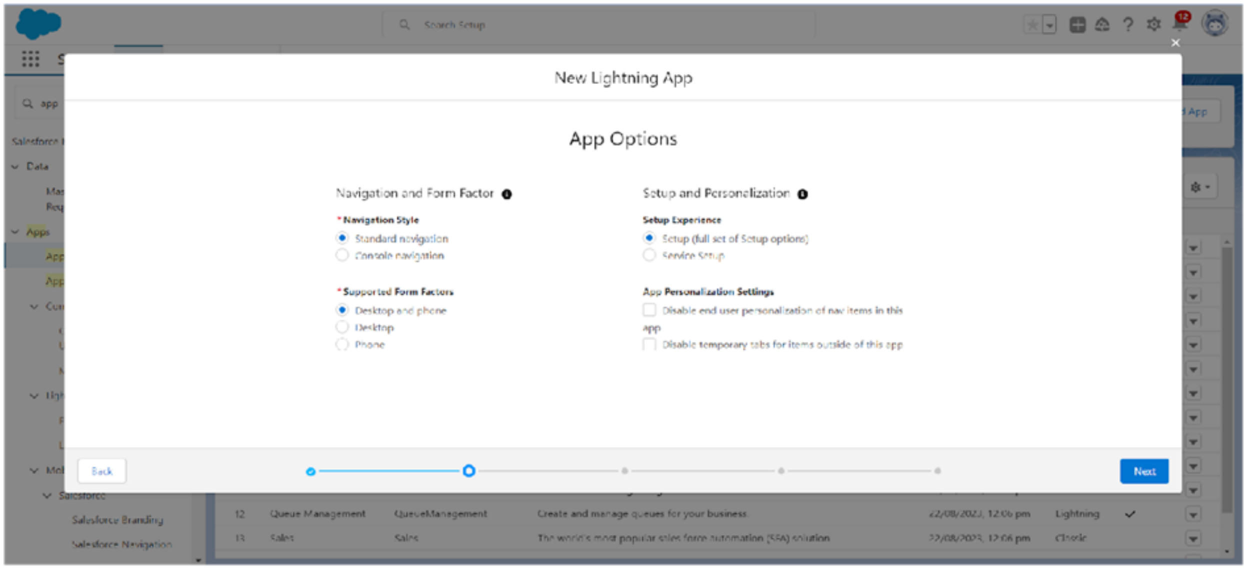


2. Fill the app name in app detailsand branding as followApp Name : FoodConnect

   DeveloperName : This willauto populated

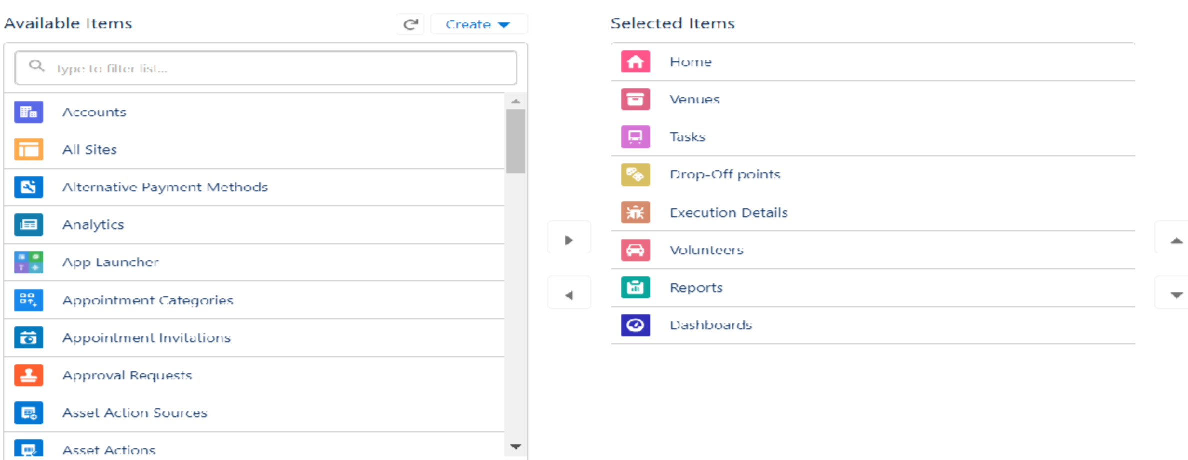
   Image : optional (if you want to give any image you can otherwise notmandatory) Primary color hex value : keep this default.

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



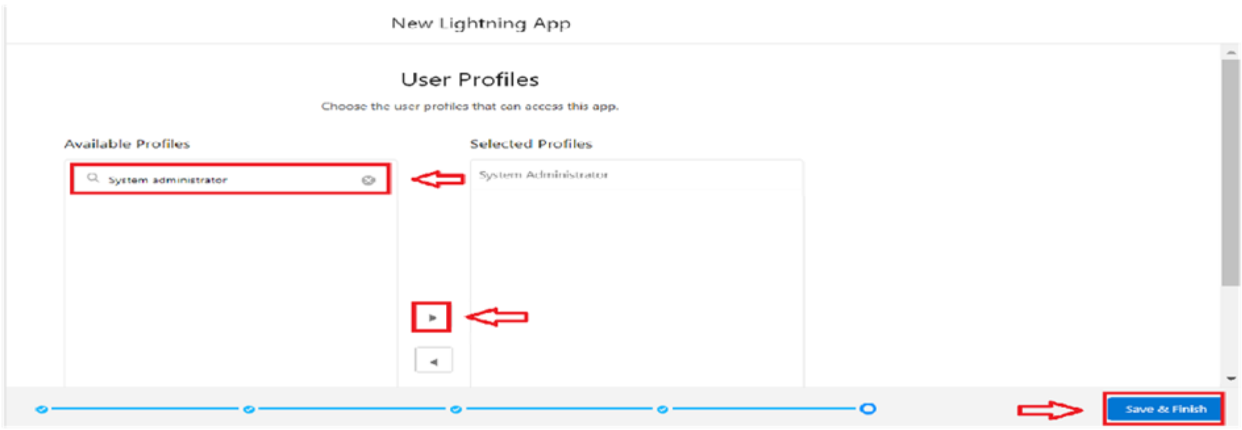
4. (Utility Items) keep it as default >> Next.

5. To Add Navigation Items:



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

6. To Add User Profiles:



Search profiles (System administrator) in the searchbar >> clickon thearrow button >> save & finish.

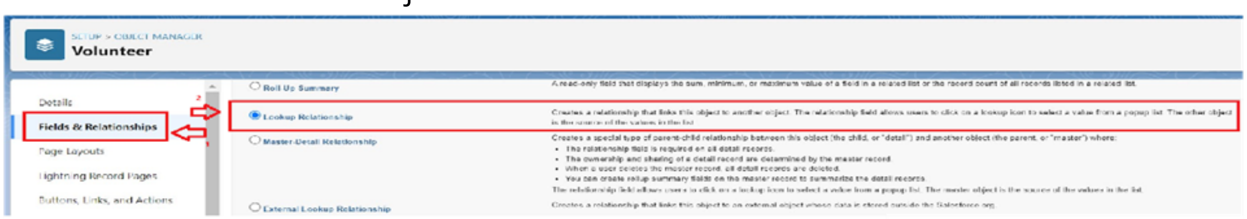
4. What are Fields?

Fields:
Fields are data columnswithin an object,similar to columnsin a database table. They hold specific piecesof information relatedto the records of the object.

Creation of Relationship fields in objects

Creation of Lookup Relationship Field on VolunteerObject :

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



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

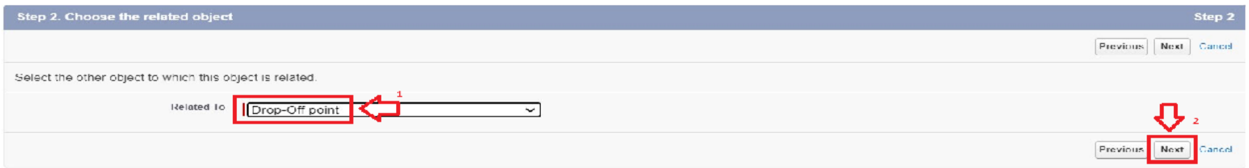
b. Select Master Detail relationship

c. Select the relatedobject “Drop-Off point” and click next.

d. Field Name : Drop_Off_point

e. Field label : Auto generated

f. Next >> Next >> Save



Creation of MasterDetail Relationship Field on ExecutionDetails Object :

a. Go to setup >>click on Object Manager >>type object name(Execution Details) in the search bar >> clickon the object.
b. Now click on “Fields & Relationships” >>New
c. Select Master Detail relationship
d. Select the related object “Volunteer” and click next.
e. Field Name : Volunteer
f. Field label : Auto generated
g. Next >> Next >> Save.

Creation of Master DetailRelationship Field on Execution DetailsObject :

h. Go to setup >>click on Object Manager >>type object name(Execution Details) in the search bar >> clickon the object.
i. Now click on “Fields & Relationships” >>New
j. Select Master Detail relationship

k. Select the relatedobject “Task” and click next.
l. FieldName : Task
m. Field label : Auto generated

n. Next >> Next >> Save.

Creation of Lookup Relationship Field on Drop-OffPoint Object :

o. Go to setup >>click on ObjectManager >> type object name(Task) in thesearchbar >> click on the object.
p. Now click on “Fields & Relationships” >>New
q. Select Lookup relationship

Select the related object “Drop-Off Point” and click next.

Field Name : Venue
Field label : Venue_c
Next >> Next >>
Save.

Creation of Lookup Relationship Field on TaskObject :

1. Go to setup>> click on ObjectManager >> type object name(Task) in thesearchbar >> click on the object.
2. Nowclick on “Fields& Relationships” >>New
3. Select Lookup relationship

Select the related object “Venue” and click next.

FieldName: SponsoredBy
Field label: Auto generated
Next>>Next >> Save.

Creation of Lookup Relationship Field on TaskObject :

1. Go to setup>> click on ObjectManager >> type object name(Task) in thesearchbar >> click on the object.
2. Nowclick on “Fields& Relationships” >>New
3. Select Lookup relationship

Select the related object “Drop-Offpoint” and click next.

Field Name : Drop-Off point

Field label: Auto generated

Next >>Next >> Save.

Creation of fields for the Venue object

1. Go to setup>> click on Object Manager >> type object name(Venue) insearchbar >> click on the object.
2. Now click on “Fields & Relationships” >>New
3. Select Data type as a “Email” and Click on Next
4. Fill theAbove as following:
    a. Field Label : Contact Email
    b. Field Name : Contact Email
    c. Click on requiredcheck box
    d. Clickon Next >> Next >>Save and new.

To create another fields in an object:

5. Go to setup >>click on ObjectManager >> type object name(Venue) insearch 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:
    e. Field Label : Contact Phone
    f. Field Name : Contact Phone
    g. Click on requiredcheck box
    h. Clickon Next >> Next >>Save and new.

To create another fields in an object:

1. Go to setup >>click on ObjectManager >> type object name(Venue) insearch 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:

    i. Field Label: Location

    j. Decimal Places : 4

    k. Field Name : Location

    l. Description : Enter the Geolocation of your Venue

    m. Clickon Next >> Next >>Save and new.

To create another fields in an object:

1. Go to setup >>click on ObjectManager >> type object name(Venue) insearch bar >> click on the object.
2. Now click on “Fields & Relationships” >>New
3. Select Data type as a “LongText Area” and Click on Next
4. Fill the Above as following:

    n. Field Label: Venue Location

    o. Field Name : Venue_Location

    p. Clickon Next >> Next >>Save and new.

Creation of fields for the Drop-Off point object

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

1. Nowclick on “Fields& Relationships” >>New
2. Select Data type as a “Geolocation” and Click on Next
3. Fill the Above as following:

    a. Field Label : Location 2

    b. Field Name : gets auto generated

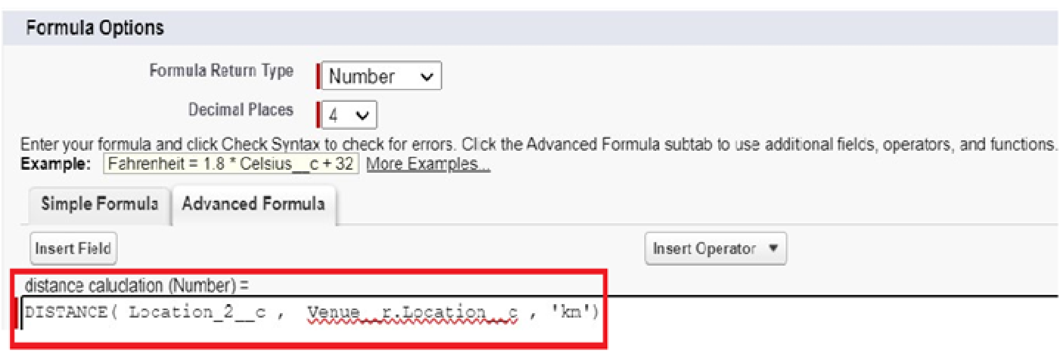
    c. Description : Enter the Geolocation of the Drop off Point

    d. Geolocation Options : select Decimal

e. Decimal Places : 4
f. Clickon Next >> Next >>Save and new.

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Drop-Offpoint) in searchbar >> 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:
    a. Field Label : distance calculation
    b. Field Name : distance_calculation
    c. Formula Return Type : Number
    d. Formula Options : DISTANCE(Location_2_ c , Venue r.Location__c ,'km')
    e. Clickon Next >> Next >>Save and new.



To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Drop-Offpoint) in searchbar >> 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:
    a. Field Label : State

b. FieldName : 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 CapitalTerritory (NCT)]
Jammu& Kashmir (UT)
Ladakh (UT)
Lakshadweep (UT)
Puducherry (UT)

c. Click on requiredcheck box
d. Clickon Next >> Next >>Save and new.

To create another fields in an object:

5. Go to setup >>click on Object Manager >>type object name(Task) insearch bar >> click on the object.
6. Now click on “Fields & Relationships” >>New
7. Select Data type as a “Number” and Click on Next
8. Fill the Above as following:
    e. Field Label: Distance
    f. Field Name : Distance
    g. Length : 14
    h. Decimal Places : 4
    i. Click on requiredcheck box
    j. Clickon Next >> Next >>Save and new.

Creation of fields for the Task object

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

1. Nowclick on “Fields& Relationships” >>New
2. Select Data type as a “Auto Number”and Click on Next

3. Fill the Above as following:
    a. FieldLabel : Task ID
    b. Display Format : TASK-{0}
    c. Starting Number : 1
    d. Field Name : gets auto generated
    e. Click on requiredcheck box
    f. Clickon Next >> Next >>Save and new.

To create another fields in an object:

1. Go to setup >>click on Object Manager >>type object name(Task) insearch bar >> click on the object.
2. Now click on “Fields & Relationships” >>New
3. Select Data type as a “Date” and Clickon Next
4. Fill the Above as following:
    g. Field Label : Date
    h. Field Name : Date
    i. Click on requiredcheck box
    j. Clickon Next >> Next >>Save and new.

To create another fields in an object:

5. Go to setup >>click on Object Manager >>type object name(Task) insearch 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 theAbove as following:
    k. Field Label: Food Category
    l. Field Name : Food Category

Enter values, with each value separated by a new line:

Veg

NonVeg

Salad

Snack

m. Click on requiredcheck box
n. Clickon Next >> Next >>Save and new.

To create another fields in an object:

9. Go to setup >>click on Object Manager >>type object name(Task) insearch bar >> click on the object.
10. Now click on “Fields & Relationships” >>New
11. Select Datatype as a “Number” and Click on Next
12. Fill the Above as following:

    o. Field Label : Number of People Served
    p. FieldName : Number_of_People_Served
    q. Click on requiredcheck box
    r. Clickon Next >> Next >>Save and new.

To create another fields in an object:

13. Go to setup >>click on Object Manager >>type object name(Task) insearch 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:
    s. Field Label : Name of the Person
    t. FieldName : Name_of_the_Person
    u. Clickon Next >> Next >>Save and new.

To create another fields in an object:

1. Go to setup>> click on ObjectManager >> type object name(Task) insearch bar >> click on the object.
2. Nowclick on “Fields& Relationships” >>New
3. Select Datatype as a “Phone” andClick on Next

4. Fill the Above as following:
    v. Field Label : Phone
    w. Field Name : Phone
    x. Clickon Next >> Next>> Save and new.

To create another fields in an object:

5. Go to setup >> click on Object Manager >>type object name(Task) insearch bar >> click on the object.
6. Nowclick on “Fields& Relationships” >>New
7. Select Data type as a “Pick List” and Click on Next
8. Fill theAbove as following:
    y. Field Label: Rating
    z. Field Name : Rating
    aa. Enter values, with each value separated by a new line

1
2
3
4
5

    ab. 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) insearch bar >> click on the object.
10. Nowclick on “Fields& Relationships” >>New
11. Select Data type as a “LongText Area” and Click on Next
12. Fill theAbove as following:
    ac. Field Label: Feedback
    ad. Field Name : Feedback
    ae. Clickon Next >> Next >>Save and new.

Creation of fields for the Volunteer object

1. Go to setup >>click on ObjectManager >> type object name(Volunteer) insearch bar >> click on the object.
2. Nowclick on “Fields& Relationships” >>New
3. Select Data type as a “Auto Number”and Click on Next
4. Fill the Above as following:
    a. FieldLabel : Volunteer ID
    b. Field Name : gets auto generated
    c. Click on requiredcheck box
    d. Clickon Next >> Next >> Save and new.
    e. Clickon Next >> Next >> Save and new.
    f.

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:
    g. Field Label: Gender
    h. Field Name : Gender
    i. Enter values, with each value separated by a new line :Female

   Male

    j. Clickon 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 Clickon Next

8. Fill the Above as following:
    k. Field Label : Available On
    l. Field Name : Available On
    m. Click on requiredcheck box
    n. Clickon 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 theAbove as following:
    o. Field Label: Age
    p. Field Name : Age
    q. Click on requiredcheck box
    r. Clickon 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:
    s. Field Label : Email
    t. Field Name : Email
    u. Click on requiredcheck box
    v. Clickon 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 Datatype as a “Number” and Click on Next
20. Fill the Above as following:

    w. Field Label: Contact Number

    x. Field Name : Contact_Number

    y. Click on requiredcheck box

    z. Clickon 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 theAbove as following:

    aa. Field Label : Address

    ab. Field Name : Address

    ac. Clickon Next >> Next >>Save and new.

To create another fields in an object:

25. Go to setup >> click on ObjectManager >> type object name(Volunteer)

    in search bar >> click on the object.

1. Now click on “Fields & Relationships” >> New 27.Select Data type as a “Date” and Click on Next 28.Fill the Above as following:

    a. Field Label : Date of Birth

    b. FieldName : Date_of_Birth

c. Clickon Next >> Next >>Save and new.

Creation of fields for the Execution Detailsobject

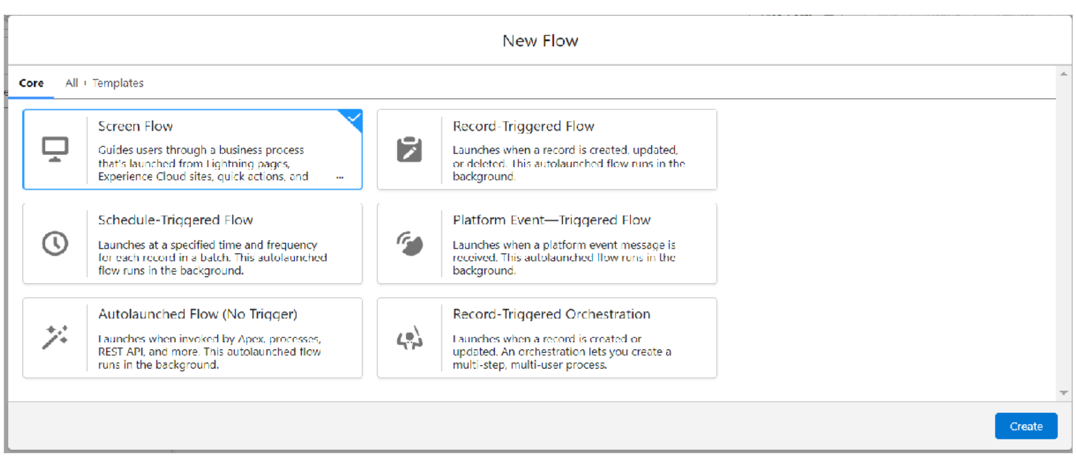
1. Go to setup>> click on Object Manager>> type objectname(Volunteer) insearchbar >> click on the object.
2. Nowclick on “Fields& Relationships” >>New
3. Select Data type as a “Auto Number”and Click on Next
4. Fill the Above as following:
   a. FieldLabel : Execution ID
   b. Field Name : gets auto generated
   c. Click on requiredcheck box
   d. Clickon Next >> Next >>Save and new.

What are Flows?

Create Flow to Create a Record in Venue Object Flows:
Flows in Salesforce are automation tools that can collect data and performactions in Salesforce. Flows can be used to automate complex business processes by using a point-and-click interface.

Create Flow to create a record in Venue object

1. Go to setup >>type Flow in quick find box >>Click on the Flow andSelect the NewFlow.
2. Select the Screenflow. Click on create.



3. Click on the ‘+’icon in betweenstart 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 andname 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

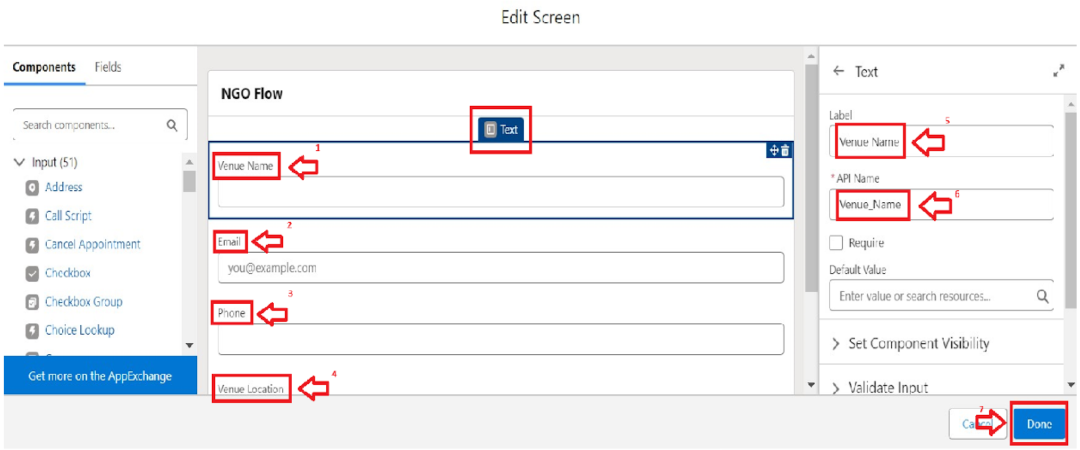
   API Name : Contact_Phone
8. Click on Text Component and name it as: Label : Venue Location

   API Name : Venue_Location
9. Click on Number Component and name it as: Label : Latitude

   API Name: Latitude
1. Click on Number Component and name it as: Label : longitude

   API Name : longitude

   Next clickon Done. This would be like below



1. This would look like:Click on Save as:

   Flow Label : Venue
   Form Flow API Name:
   Venue_Form

What is a Trigger?

Create a Trigger, TriggerCode Trigger:
A trigger is an Apex script that executes before or after specified databaseevents, such as insert, update,or delete.

Create a Trigger

a. Log into the trailheadaccount, navigate to the gear icon in the top rightcorner.
b. Click on developer consoleand you will be navigatedto a new consolewindow.
c. Click on the File menu in the toolbar, and click on new >> Trigger.
d. Enter the trigger name and the object to be triggered.
e. Enter Name : DropOffTrigger
   sObject: Drop-Off Point

f. Click on Submit.

Trigger Code

(This Trigger is to assign Distance field to the Distance Calculation field. Sothat we can assignthe distance in thesharing rules.)

Code:

```
trigger DropOffTrigger on Drop_Off_point_ c (before insert) {
  for(Drop_Off_point__cDrop: Trigger.new){
     Drop.Distance__c= Drop.distance_calculation__c;
  }
}
```

What are Profiles and Creation of Users

Profiles:

1. Profiles in Salesforce define a user'spermissions to performdifferent functions withinSalesforce. Profiles controlaccess to objects,fields, and various functionalities.

Profiles

1. Go to setup page >>type Profiles in Quick Find bar >>click on Profiles >> click on 'S'
2. Click on Clone besideStandard Platform User.
3. Under Clone Profile:

   Profile Name : NGOs Profile Then clickon Save.

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 : Iksha

Email : Give Your Email

Username :(give the usernamedifferent)

Nickname : Auto Populated

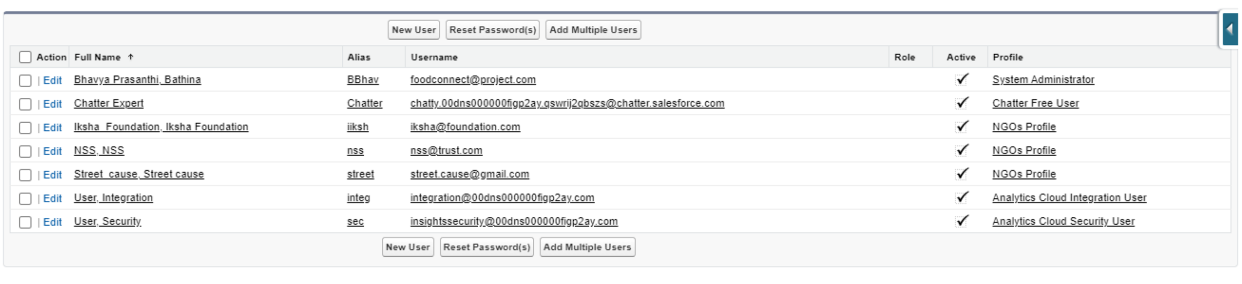
UserLicense : Salesforce PlatformProfile : NGOs Profile

Active : Check

3. Click on Save

Creation of User2, User3

1. Create anotherTwo Users by following steps in Activity- 1 with similarUser License and Profile.
2. Give DifferentFirst Name, Last Name based on DifferentNGO's.



New User | Reset Password(s) | Add Multiple Users

Action	Full Name ↑	Alias	Username	Role	Active	Profile
Edit	Bhavya Prasanthi, Bathina	BBhav	foodconnect@project.com		✓	System Administrator
Edit	Chatter Expert	Chatter	chatty.00dns000000figp2ay.qswrij2qbszs@chatter.salesforce.com		✓	Chatter Free User
Edit	Iksha_Foundation, Iksha Foundation	iiksh	iksha@foundation.com		✓	NGOs Profile
Edit	NSS, NSS	nss	nss@trust.com		✓	NGOs Profile
Edit	Street_cause, Street cause	street	street.cause@gmail.com		✓	NGOs Profile
Edit	User, Integration	integ	integration@00dns000000figp2ay.com		✓	Analytics Cloud Integration User
Edit	User, Security	sec	insightssecurity@00dns000000figp2ay.com		✓	Analytics Cloud Security User

New User | Reset Password(s) | Add Multiple Users

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

What are Public Groups and Creation of Public Groups

Public Groups:

1. Public Groups are collections of users that can be used to simplify the sharing of records, access permissions, and reporting within Salesforce

Creation of PublicGroup 1

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

Under Group Information:
Label : Iksha

Group Name : Iksha

Grant Access Using Hierarchies : Check

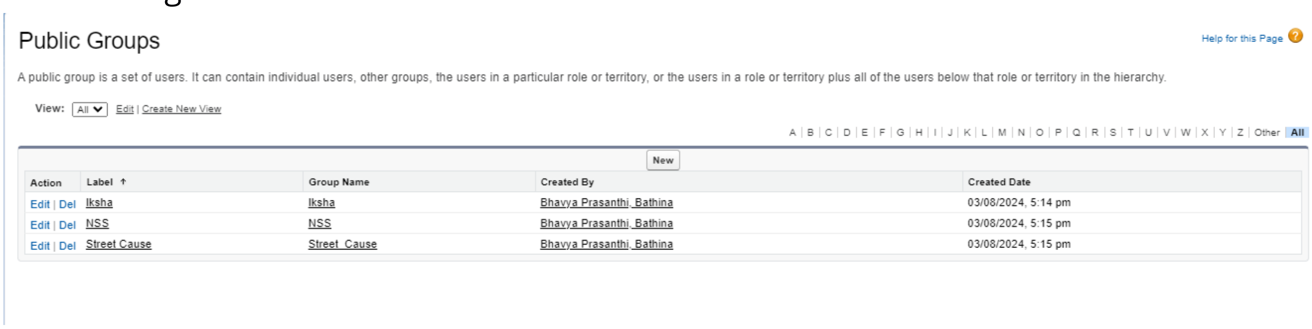
i. In Search, Select Users.

ii. In Selected MembersAdd Iksha Foundation and SystemAdministrator

Creation of PublicGroup 2

1. By FollowingSteps in Activity1, Create other two Public Groups for othertwo users.

After Saving this would look like this.



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

New

Action	Label ↑	Group Name	Created By	Created Date
Edit | Del	Iksha	Iksha	Bhavya Prasanthi, Bathina	03/08/2024, 5:14 pm
Edit | Del	NSS	NSS	Bhavya Prasanthi, Bathina	03/08/2024, 5:15 pm
Edit | Del	Street Cause	Street_Cause	Bhavya Prasanthi, Bathina	03/08/2024, 5:15 pm

What are Report Types and Creation of Report

Type Report Types:
Report Types in Salesforce definethe objects and fields that are available for use in reports. Customreport types can be createdto combine data from different objects.

Creation of Report Types

Go to setup page >> type Report Types in Quick Find bar >> click on Report Types >> click on Continue >> Click on New Custom Report Type.

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 withDropOff with Volunteer Store in Category : Select Other Reports Deployment Status : Deployed

i. Click on Next
ii. Near Click to relate another Object Select Drop-Off Points.
iii. And also select "A" recordsmay or may not have related "B" records.
iv. Now again Near Click to relate another ObjectSelect Volunteers.
v. Now click on Save.

Report Creation

Creation of Report on Venue with DropOff with Volunteer

vi. Go to the app(FoodConnect) >> click on the reports tab
vii. Click on New Folder.

Folder Label: Custom Reports

Folder Unique Name : CustomReports

viii. Open CustomReports and clickon New Report
ix. Select Report Type : Venue withDropOff with Volunteer
x. Then click on Start Report.
xi. In GROUP ROWS : Add VolunteerName
xii. In Columns : Add Venue Name, Drop-Off pointName, Distance.

xiii. Nowclick on Save & Run.

xiv. Give Label as :

xv. Report Name : venue and Drop Off point

xvi. Report Unique Name : Auto Populated

xvii. Click on Select Folder andselect Custom Report,then click on Save.

Creation of Report on Volunteers with ExecutionDetails and Tasks

1. Go to the app(FoodConnect) >> click on the reports tab
2. Click on Custom ReportsFolder 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. GiveLabel as :

   Report Name : Volunteer Task

   Report Unique Name : Auto Populated

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

What are Dashboards?

Dashboards:

1. Dashboards in Salesforce are visual representations of reports, allowingusers to monitorkey metrics and performance indicators at a glance.

Adding venue and Drop Off point Report to the

Dashboard

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

xix. Click on New Folder.

Folder Label : Custom Dashboards Folder Unique Name : Auto Populated

xx. Open CustomDashboards and click on New Dashboards

xxi. Name : Organization Details

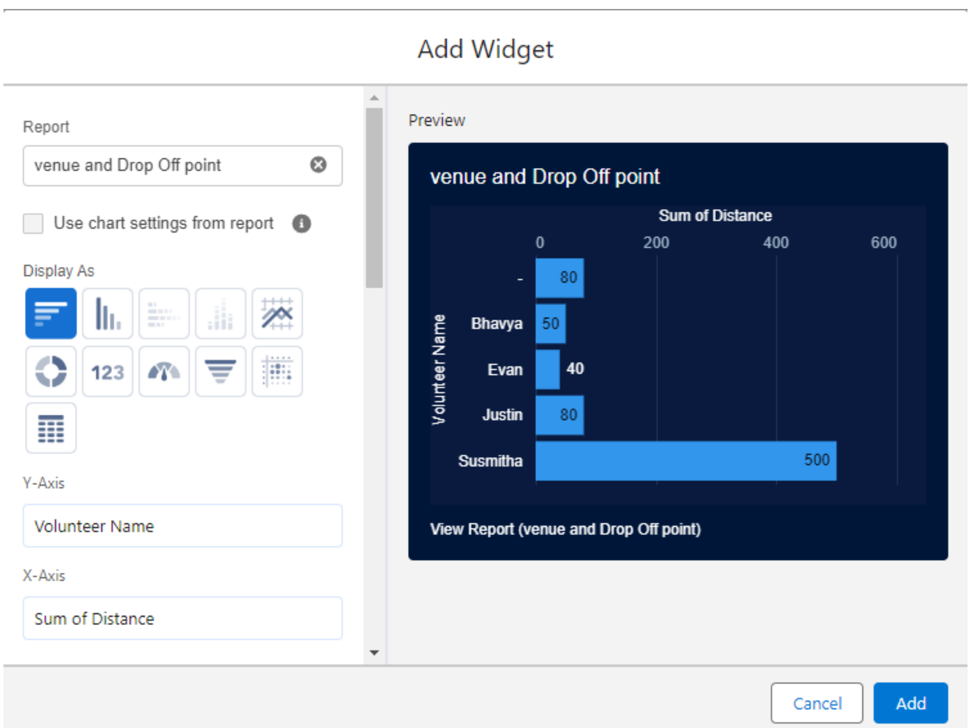
xxii. Click on Widget and select Chart or Table

xxiii. In Select Report : Select venue and Drop Off point Report.

xxiv. Then click on select

xxv. In Add Component:

Display As : Select Lightning Table Component Theme : Select Dark (Optional)



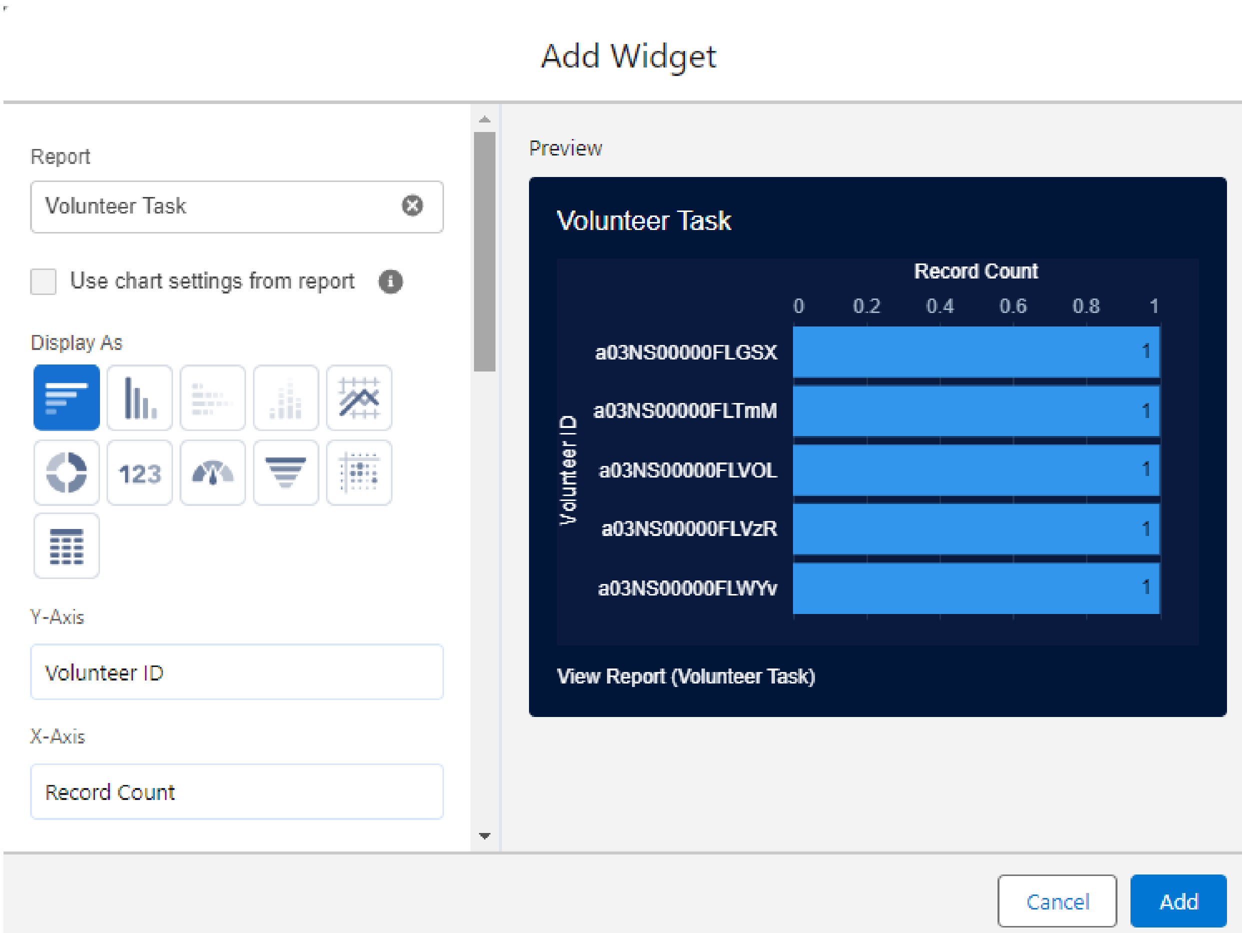
Now click on save.

Adding Volunteer Task Report to the Dashboard

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

   Display As : Select Line Chart

   Component Theme : Select Dark (Optional)



1. Now click on save.

Adding a Picture to the Dashboard (Optional)

(Note : To upload an image into the Dashboard, we have to first

downloadan image from google or othe rsources into your system)

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

   Name : TaskExecution Details

   Click on Select Folderand select CustomDashboards
4. Click on Select Folder and then Save.

What are Sharing Rules? Creation of Sharing

Rules Sharing Rules:

1. Sharing Rules in Salesforce are used to extend the sharing accessgranted to users. They allow you to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Creation of sharing rules

i. Go to setup >>type Sharing Settingsin quick find box

>>Click on theSharing Settings.

ii. Scroll down and find Drop-Off point Sharing Rules.

iii. Click on new near Drop-Off point Sharing Rules and Name it as: Label : Rule 1

RuleName : Rule_1

iv. Select your rule type : Select Based on criteria.

v. Select which records to be shared:

Field: Operator : Value= Distance : lessthan : 15

vi. Select the users to share with : Near Share With Public Groups: Iksha

vii. Clickon Save.

viii. Click on new near Drop-Off point Sharing Rules and Name it as: Label : Rule 2

RuleName : Rule_2

ix. Select your rule type : Select Based on criteria.

x. Select which records to be shared:

Field : Operator : Value = Distance : greater than : 15 Field: Operator : Value= Distance : lessor equal : 3011.Select the users to share with : NearShare With

Public Groups : NSS

1. Clickon Save.
2. Click on new near Drop-Off point Sharing Rules and Name it as: Label : Rule 3

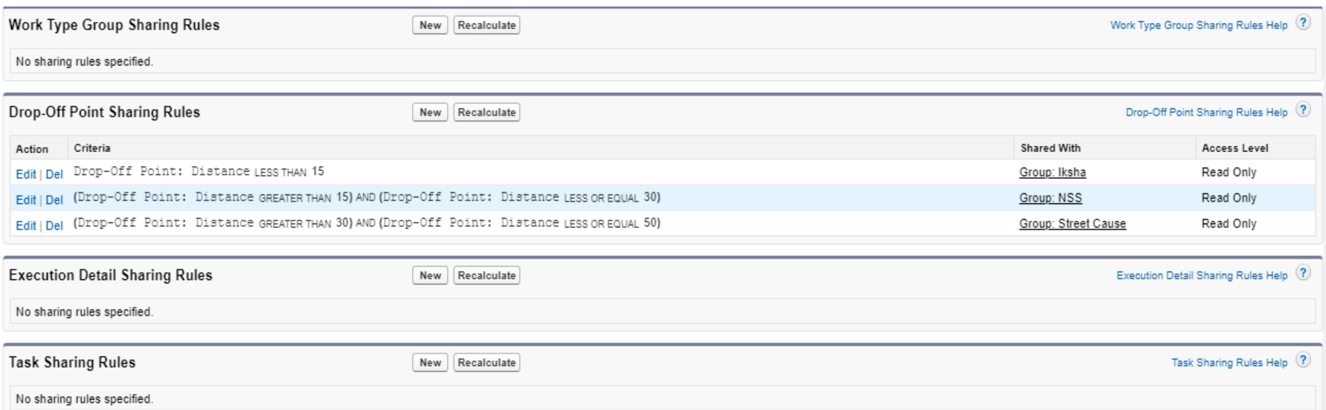
   Rule Name : Rule_3
3. Select your rule type : Select Based on criteria.

4. Select which records to be shared:

   Field: Operator : Value= Distance : greater than : 30Field : Operator : Value = Distance: less or equal : 50

5. Select the users to share with : Near Share WithPublicGroups : Street Cause

Click on Save.



Home Page and Creation of Home Page

Home Page:

1. The Home Page in Salesforce is a customizable page that providesusers with an overview of their tasks,calendar events, and other importantinformation.

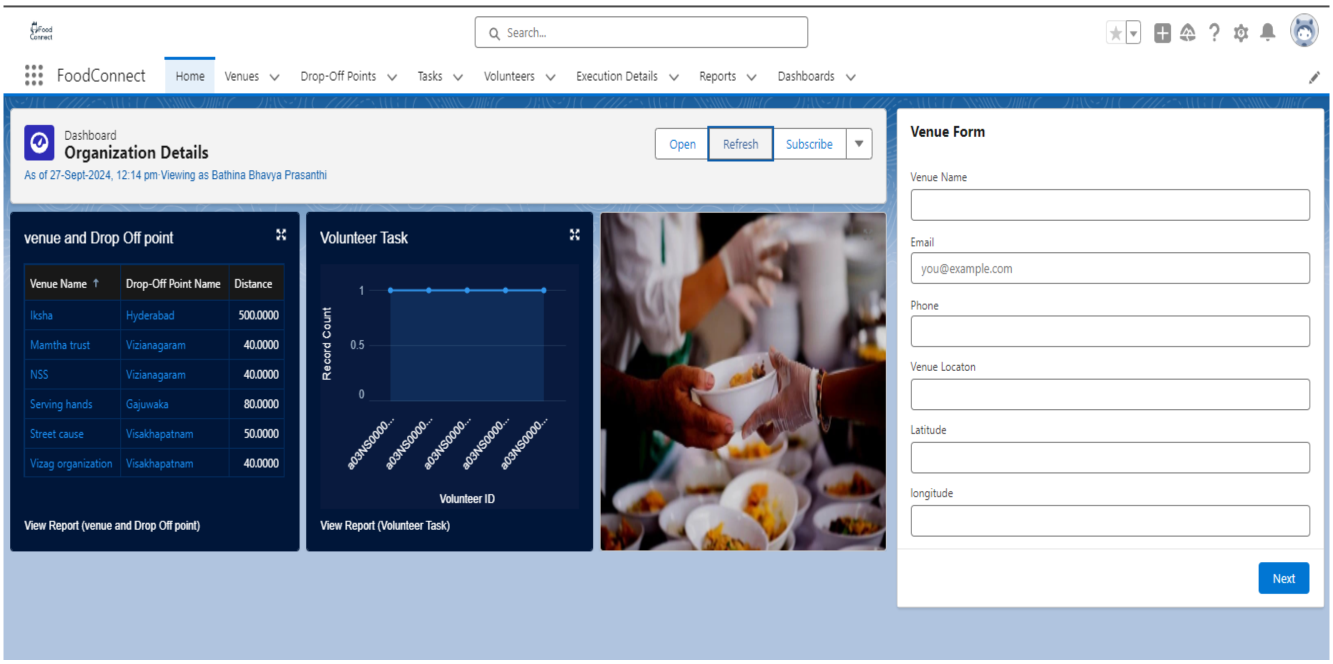
Creation of Home Page

a. Go to setup >>type Lightning App Builder in quick find box >>Click onthe Lightning AppBuilder and Selectthe New.
b. Select Home Page and give Label as HOME Page.
c. Select Standard Home Page.
d. Near Components searchfor Flow and Drag and Drop in Right SideSection..
e. On the right hand side:

Flow : Venue Flow

f. Near Components searchfor Dashboard, then Drag and Drop it in firstSection.
g. Clickon Save and Activation, thenclick on App Default, thenAddAssignments.
h. Add FoodConnect App and then Save.

FoodConnect Home Page would Look Like this.



Conclusion:

By utilizing the Salesforce platform, the project successfully created a streamlined and transparent system for managing surplus food donations. With efficient coordination of volunteers and timely deliveryto beneficiaries, the project effectively tackled food insecurity and maximized the use of available resources.