

# **FoodLink - A Salesforce-Powered Solution for Redistributing Surplus Food**

Developed by

**Sandhita Roy**  
**Academy of Technology**  
[sandhita.roy.21@aot.edu.in](mailto:sandhita.roy.21@aot.edu.in)

## **ABSTRACT**

This project presents a comprehensive food redistribution system powered by Salesforce CRM, designed to combat food waste and hunger by efficiently connecting surplus food with underserved communities. By leveraging Salesforce's robust platform, the system streamlines the process of identifying, collecting, and distributing leftover food from donors—such as restaurants, grocery stores, and households—to non-profit organizations and individuals in need.

The primary objective is to facilitate seamless communication between food donors and distributors, ensuring that surplus food is redistributed quickly and efficiently to poor and food-insecure populations. With features like real-time inventory tracking, automated notifications, and donor management, the platform empowers volunteers and organizations to operate more effectively. Additionally, the system provides data analytics for monitoring food donation trends, helping stakeholders make informed decisions that can drive community impact.

FoodLink underscores the importance of technology in addressing social challenges, particularly food insecurity. By utilizing Salesforce CRM to create a user-friendly, scalable platform, we aim to reduce food waste and provide a lifeline to those in need, enhancing the well-being of communities and promoting sustainability.

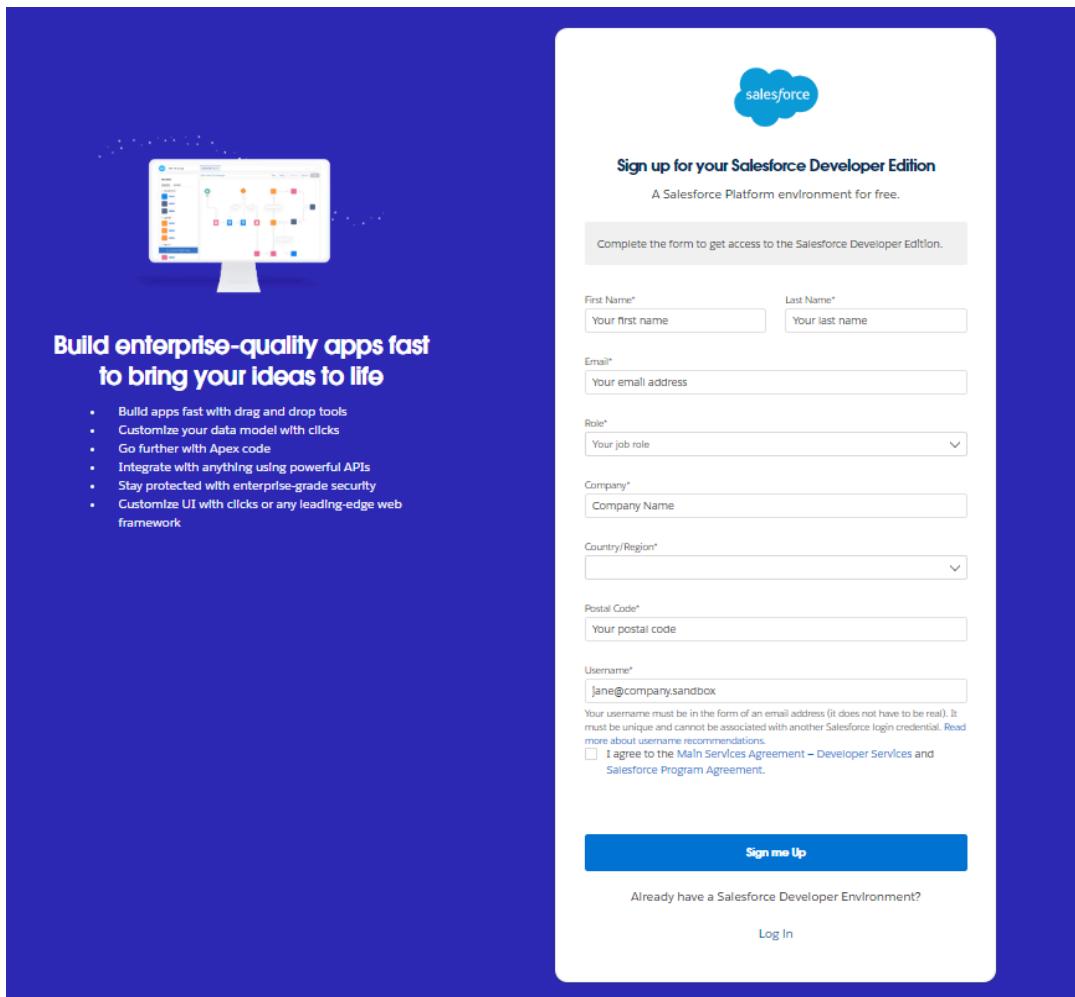
# INDEX

<b>TOPICS</b>	<b>PAGES</b>
1. Creation of Salesforce org	01 - 02
2. Object	03 - 08
3. Tabs	09
4. The Lightning App	10 - 11
5. Fields	12 - 25
6. Flows	25 - 27
7. Trigger	27 - 28
8. Profiles	28 - 29
9. Creation of Users	29 - 30
10. Public Groups	31
11. Report Types	32 - 33
12. Reports	33 - 35
13. Dashboards	36 - 37
14. Sharing Rules	38 - 39
15. Home Page	39 - 40

# 1. Creation of Salesforce Org

## Step 1: Sign Up for a Developer Org

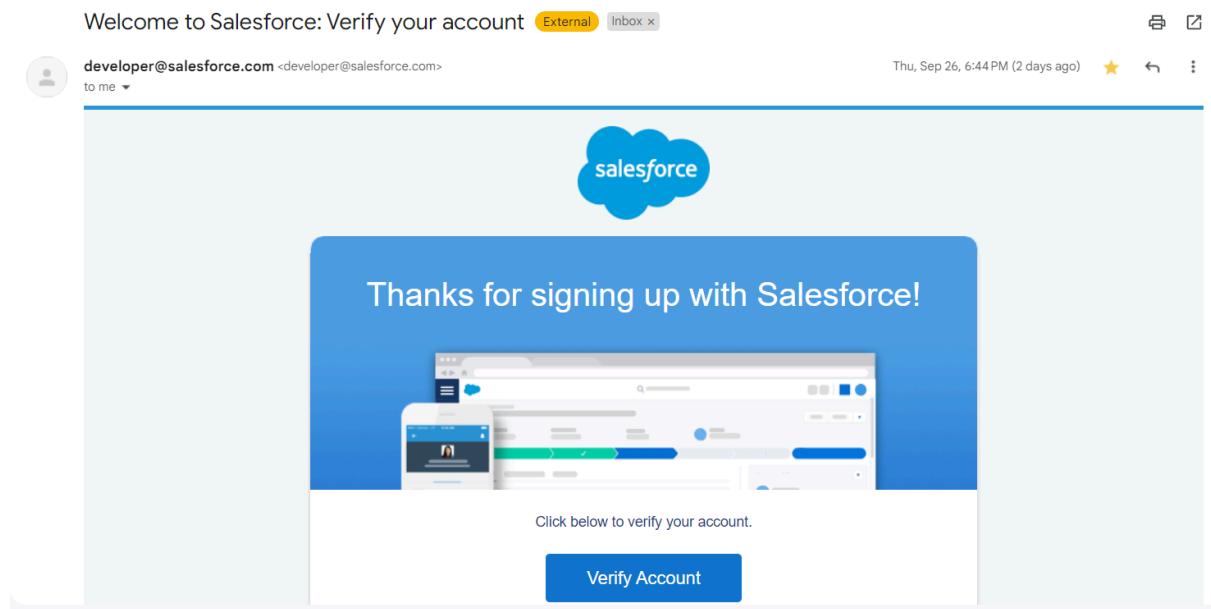
1. Go to [developers.salesforce.com/signup](https://developers.salesforce.com/signup).
2. Click on "Sign Up."
3. Fill out the Sign-Up Form with the following details:
  - **First Name & Last Name**
  - **Email**
  - **Role:** Developer
  - **Company:** [Your College Name]
  - **Country:** India
  - **Postal Code:** [Your Pin Code]
  - **Username:** Create a username using a combination of your name and company. This does not need to be a valid email; you can format it as [username@organization.com](mailto:username@organization.com).
4. Click on "Sign Up" after filling in all the details.



The image shows a screenshot of the Salesforce Developer Edition sign-up page. The page has a white background with a blue header featuring the Salesforce logo. The main heading is "Sign up for your Salesforce Developer Edition" followed by the subtext "A Salesforce Platform environment for free." Below this, there is a form with various input fields: "First Name\*" and "Last Name\*", both with placeholder text "Your first name" and "Your last name". There is also an "Email\*" field with placeholder "Your email address". The "Role\*" field is a dropdown menu with "Your job role" as the placeholder. The "Company\*" field has "Company Name" as the placeholder. The "Country/Region\*" field is a dropdown menu. The "Postal Code\*" field has "Your postal code" as the placeholder. The "Username\*" field contains "jane@company.sandbox". A small note below it says: "Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. Read more about username recommendations." There is a checkbox for "I agree to the [Master Services Agreement – Developer Services](#) and [Salesforce Program Agreement](#)". At the bottom of the form is a large blue "Sign me Up" button. Below the button, there is a link "Already have a Salesforce Developer Environment?" and a "Log In" link.

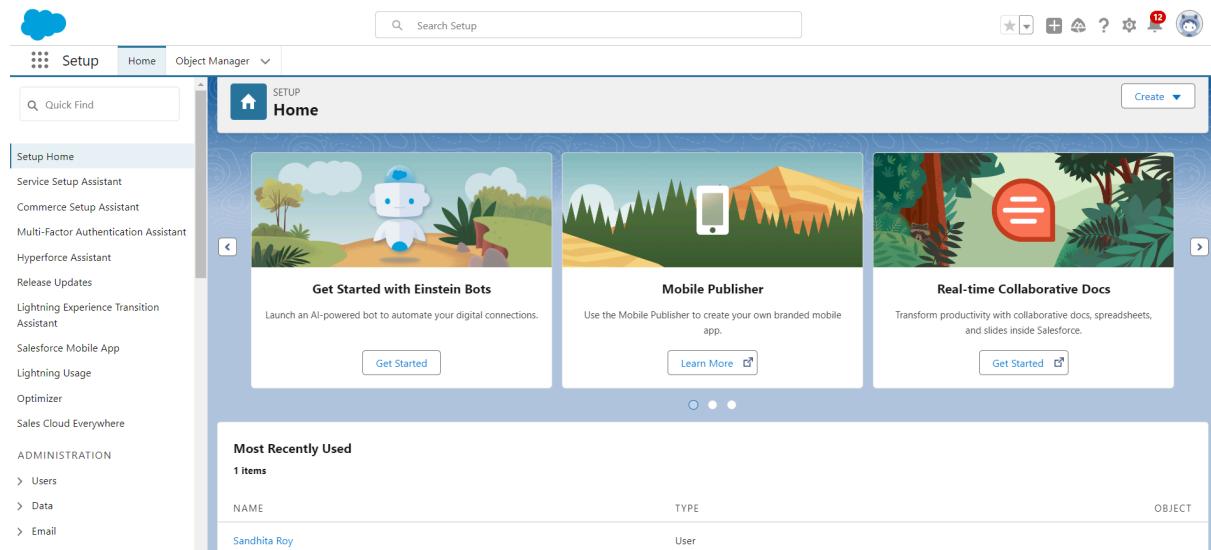
## Step 2: Sign Up for a Developer Org

1. Go to your email inbox that you used for signing up.
2. Find the verification email from Salesforce and click on the "**Verify Account**" link to activate your account.  
**Note:** The email might take 5-10 minutes to arrive.



## Step 3: Login to your Salesforce Account

1. Go to [login.salesforce.com](https://login.salesforce.com).
2. Enter your username and password created during the sign-up process.
3. Login to access your Salesforce Developer account.  
You will see the home page after logging in.



## 2. Object

Salesforce objects are database tables that allow you to store data specific to an organization.

Objects in Salesforce are of two types:

1. **Standard Objects:** These are the pre-built objects provided by Salesforce, such as Users, Contracts, Reports, Dashboards, and more. Standard objects form the foundation of Salesforce's data structure and cover common business scenarios.
2. **Custom Objects:** These are user-defined objects created to store data that is unique to your organization's needs. In the context of the FoodLink System, examples of custom objects include **Venue**, **Drop-Off Point**, **Task**, **Volunteer** and **Execution Details**.

### 2.1. Creating Objects for FoodLink

In the FoodLink System, we need to create three custom objects: **Venue**, **Drop-Off Point**, **Task**, **Volunteer** and **Execution Details**. The following steps will guide you through the process of creating these objects in Salesforce.

#### Step 1: Access Setup

1. Click on the **gear icon** in the upper-right corner of Salesforce.
2. Select "**Setup**" from the dropdown menu.

#### Step 2: Open Object Manager

1. Click on the "**Object Manager**" tab located next to the Home tab.

#### Step 3: Create a Custom Object

1. On the Object Manager page, look to the right side of the screen.
2. Click on the "**Create**" dropdown and select **Custom Object**.

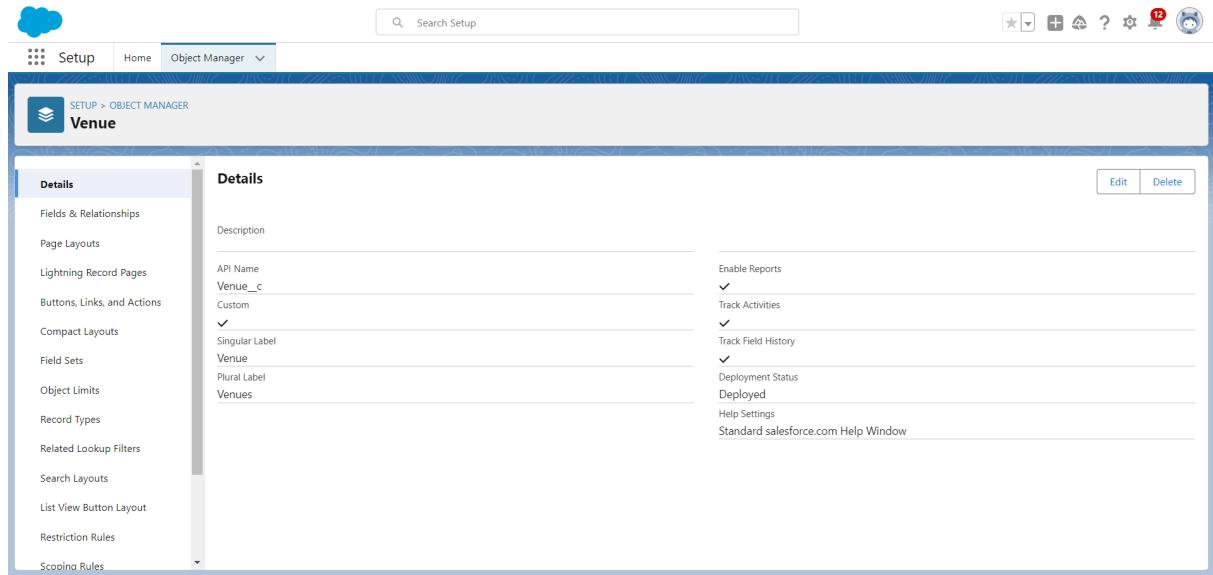
#### Step 4: Create "Venue" Object

1. On the Custom Object Definition page, enter the following details:
  - a. **Label:** Venue
  - b. **Plural Label:** Venues
  - c. **Record Name:** Venue Name
  - d. **Data Type:** Text

2. Check the following boxes:

- Allow Reports
- Allow Activities
- Track Field History
- Allow Search

3. Click "**Save**" to create the object.



## 2.2. Creating the Drop-Off Point Object

The following steps will guide you through the process of creating the Drop-Off Point object in Salesforce.

### Step 1: Access Setup

1. Click on the **gear icon** in the upper-right corner of Salesforce.
2. Select "**Setup**" from the dropdown menu.

### Step 2: Open Object Manager

1. Click on the "**Object Manager**" tab located next to the Home tab.

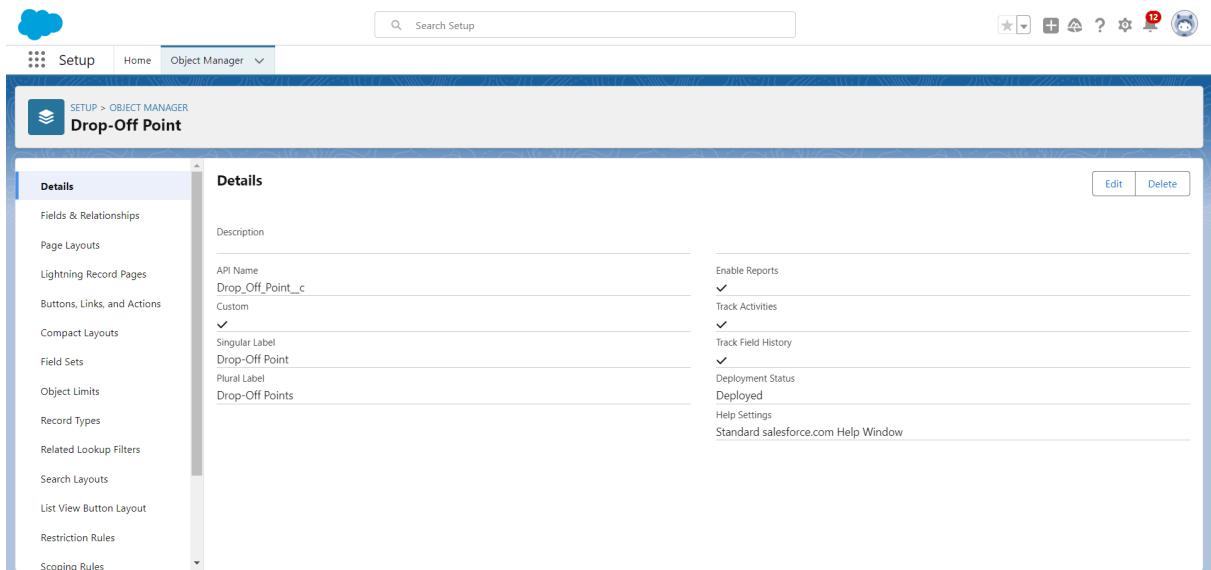
### Step 3: Create a Custom Object

1. On the Object Manager page, look to the right side of the screen.
2. Click on the "**Create**" dropdown and select **Custom Object**.

### Step 4: Create "Drop-Off Point" Object

1. On the Custom Object Definition page, enter the following details:
  - **Label:** Drop-Off Point

- **Plural Label:** Drop-Off Points
  - **Record Name:** Drop-Off Point Name
  - **Data Type:** Text
2. Check the following boxes:
    - Allow Reports
    - Allow Activities
    - Track Field History
    - Allow Search
  3. Click "**Save**" to create the object.



## 2.3.Creating the Task Object

The following steps will guide you through the process of creating the Task object in Salesforce.

### Step 1: Access Setup

1. Click on the **gear icon** in the upper-right corner of Salesforce.
2. Select "**Setup**" from the dropdown menu.

### Step 2: Open Object Manager

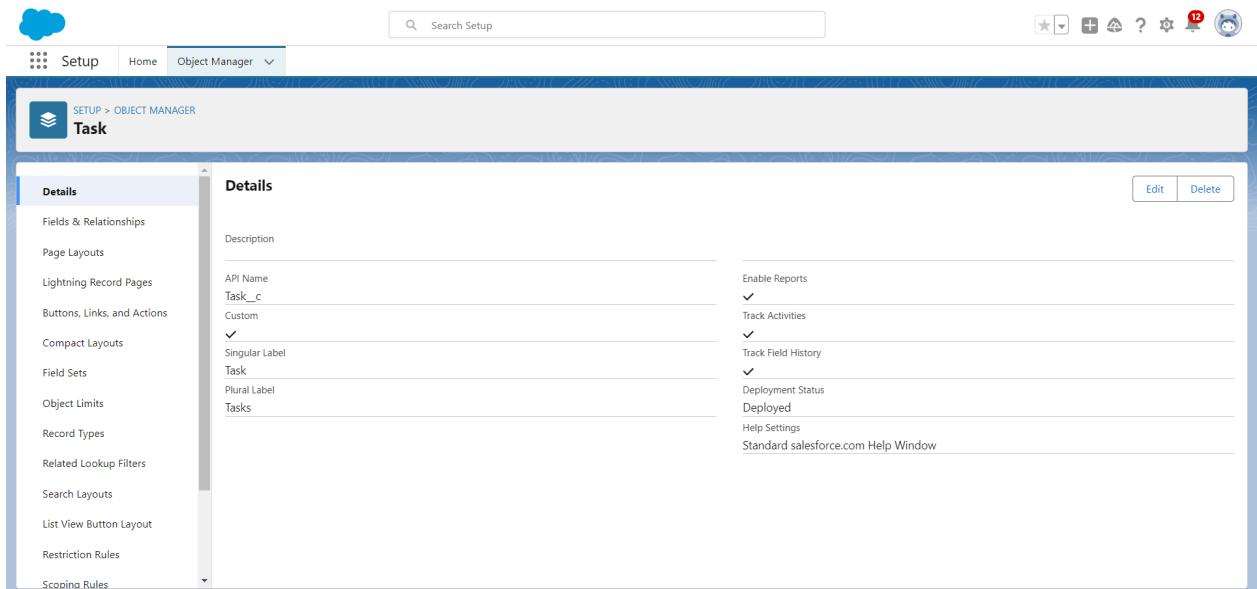
1. Click on the "**Object Manager**" tab located next to the Home tab.

### Step 3: Create a Custom Object

1. On the Object Manager page, look to the right side of the screen.
2. Click on the "**Create**" dropdown and select **Custom Object**.

## Step 4: Create "Task" Object

1. On the Custom Object Definition page, enter the following details:
  - **Label:** Task
  - **Plural Label:** Tasks
  - **Record Name:** Task Name
  - **Data Type:** Text
2. Check the following boxes:
  - Allow Reports
  - Allow Activities
  - Track Field History
  - Allow Search
3. Click "**Save**" to create the object.



## 2.4. Creating the Volunteer Object

The following steps will guide you through the process of creating the Volunteer object in Salesforce.

### Step 1: Access Setup

1. Click on the **gear icon** in the upper-right corner of Salesforce.
2. Select "**Setup**" from the dropdown menu.

### Step 2: Open Object Manager

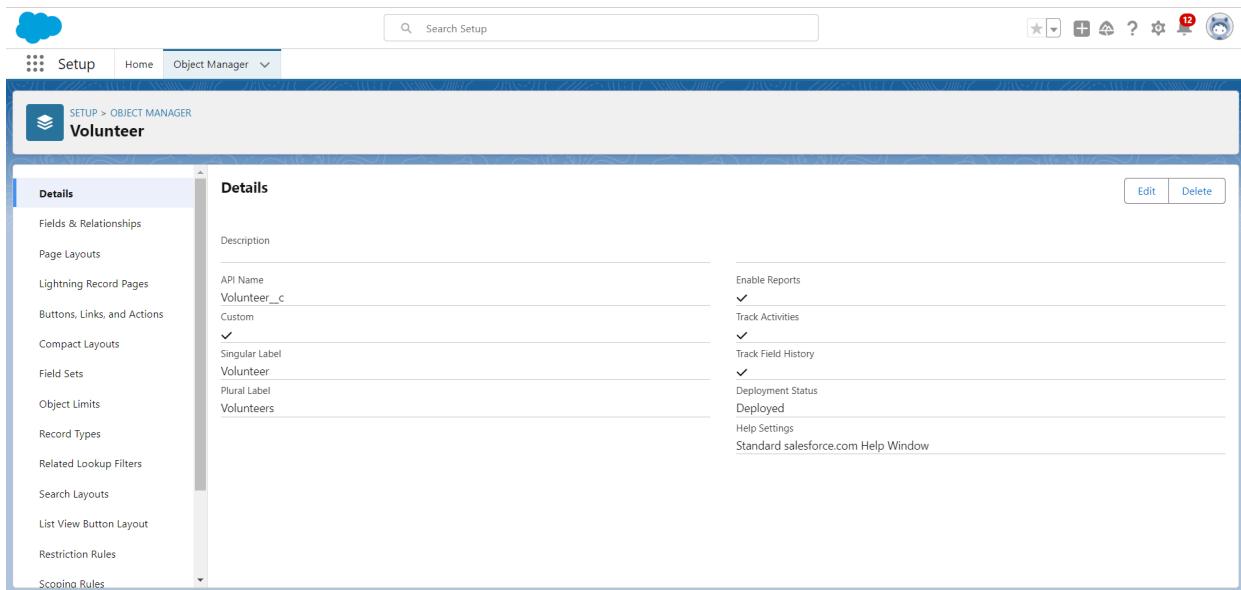
1. Click on the "**Object Manager**" tab located next to the Home tab.

### Step 3: Create a Custom Object

1. On the Object Manager page, look to the right side of the screen.
2. Click on the "Create" dropdown and select **Custom Object**.

### Step 4: Create "Volunteer" Object

1. On the Custom Object Definition page, enter the following details:
  - **Label:** Volunteer
  - **Plural Label:** Volunteers
  - **Record Name:** Volunteer Name
  - **Data Type:** Text
2. Check the following boxes:
  - Allow Reports
  - Allow Activities
  - Track Field History
  - Allow Search
3. Click "**Save**" to create the object.



## 2.5. Creating the Execution Detail Object

The following steps will guide you through the process of creating the Execution Detail object in Salesforce.

### Step 1: Access Setup

3. Click on the **gear icon** in the upper-right corner of Salesforce.
4. Select "**Setup**" from the dropdown menu.

## Step 2: Open Object Manager

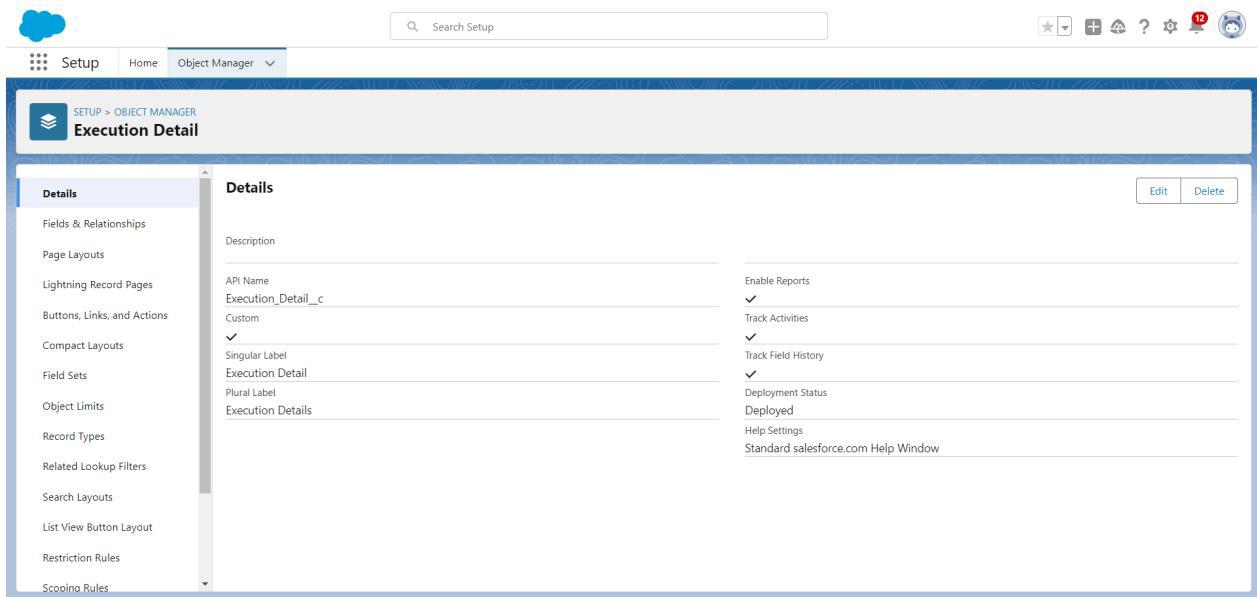
2. Click on the "Object Manager" tab located next to the Home tab.

## Step 3: Create a Custom Object

3. On the Object Manager page, look to the right side of the screen.
4. Click on the "Create" dropdown and select **Custom Object**.

## Step 4: Create "Execution Detail" Object

4. On the Custom Object Definition page, enter the following details:
  - **Label:** Execution Detail
  - **Plural Label:** Execution Details
  - **Record Name:** Execution Detail Name
  - **Data Type:** Text
5. Check the following boxes:
  - Allow Reports
  - Allow Activities
  - Track Field History
  - Allow Search
6. Click "**Save**" to create the object.



### 3. Tabs

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

#### Create a Custom Tab:

1. Click the "**Home**" tab and enter "Tabs" in the Quick Find search bar.
2. Select "**Tabs**" from the search results.
3. Under Custom Object Tabs, click **New**.
4. For Object, select **Venue**.
5. For Tab Style, select any icon that represents your object.
6. Leave all other settings as defaults and click **Next**.
7. Click "**Next**". Uncheck the include tab.
8. Make sure the Append tab to users' existing personal customizations is checked. Click **Save**.
9. Repeat Steps 3 to 8 for the remaining objects (**Drop-Off Point, Task, Volunteer, Execution Details**)

The screenshot shows the Salesforce Setup interface under the 'User Interface' section, specifically the 'Tabs' page. The main content area is titled 'Custom Tabs' and contains a sub-section for 'Custom Object Tabs'. A table lists five tabs for the 'Venue' object:

Action	Label	Tab Style	Description
Edit   Del	Drop-Off Points	Boat	
Edit   Del	Execution Details	Chalkboard	
Edit   Del	Tasks	Computer	
Edit   Del	Venues	Building	
Edit   Del	Volunteers	People	

Below this, there are sections for 'Web Tabs' and 'Visualforce Tabs', both of which currently have no entries defined.

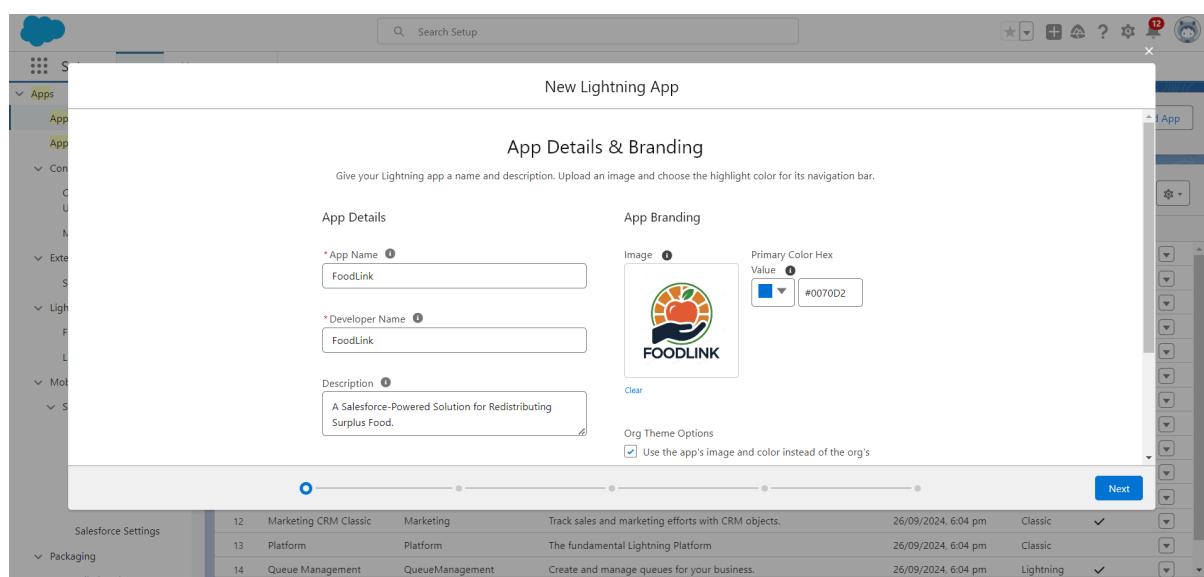
## 4. The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your 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.

### 5.1. Create a Lightning App

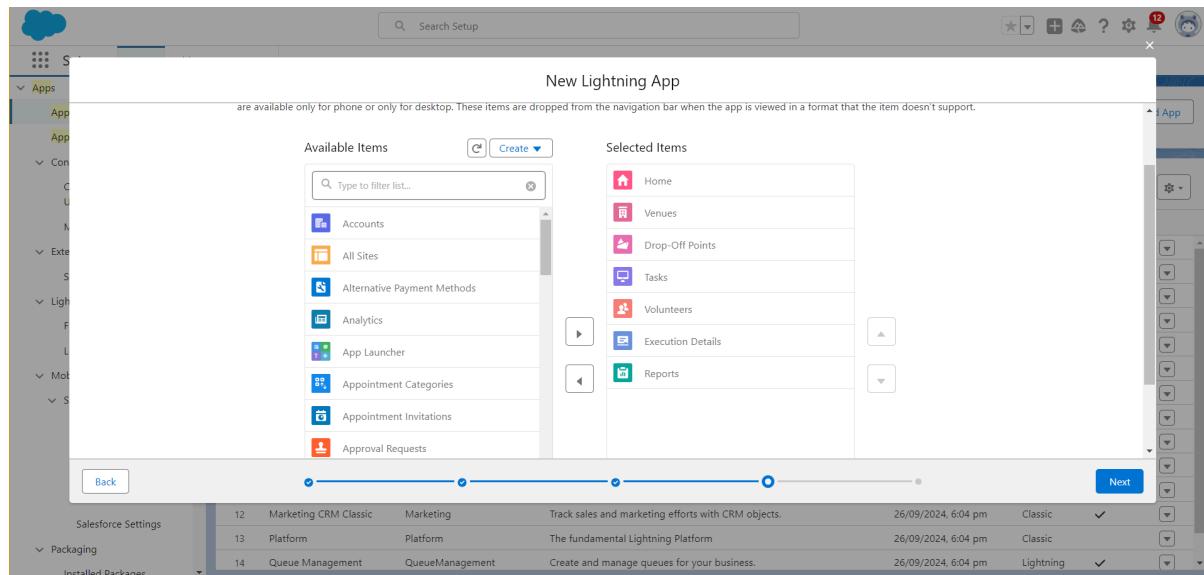
To create a Lightning app page:

1. Go to the **Setup** page.
2. In the Quick Find search bar, type “App Manager” and select “**App Manager**.”
3. Click on **New Lightning App**.
  - Fill the app name as **FoodLink** in App Details and Branding.
  - Click **Next**.
  - On the App Options page, keep the settings as default.
  - Click **Next**.
  - On the Utility Items page, keep the settings as default.
  - Click **Next**.



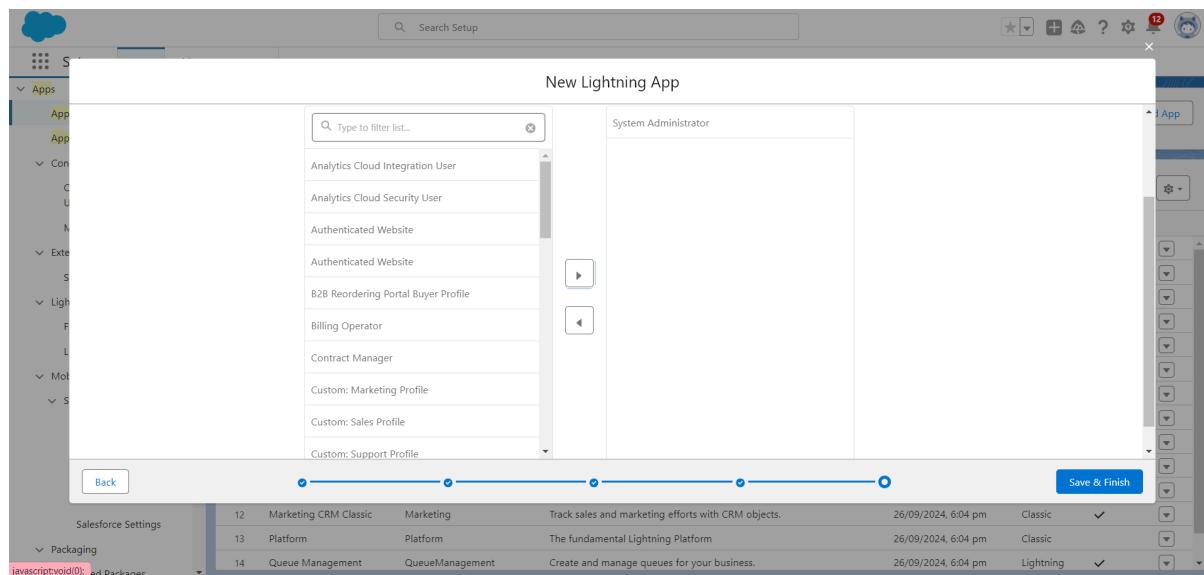
## To Add Navigation Items:

1. Select the items (**Home, Venue, Drop-Off Point, Task, Volunteer, Execution Details, Reports**) from the search bar and move them using the arrow button.
2. Click **Next**.



## To Add User Profiles:

1. Search for profiles (**System Administrator**) in the search bar.
2. Click on the arrow button to add the profile.
3. Click **Save & Finish**.



## 5. Fields

In Salesforce, an object relationship is a two-way association between two objects, allowing users to connect and interact with related data across different objects. This relationship is established by creating custom relationship fields on an object. These relationship fields enable users to view records and seamlessly access related information, providing a comprehensive view of data across the Salesforce environment. By using relationships, Salesforce ensures that all related data is interconnected, making it easier for users to navigate between related records, improving data consistency, and enhancing the overall user experience.

### 5.1. 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.**

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'SETUP', 'Home', and 'Object Manager'. The main area displays the 'Volunteer' object details. On the left, a sidebar lists various configuration options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The central panel shows the 'Drop-Off Point' custom field definition. Key details include:

- Field Information:** Field Label: Drop-Off Point, Field Name: Drop\_Off\_Point, API Name: Drop\_Off\_Point\_c.
- Object Name:** Volunteer
- Data Type:** Master-Detail
- Created By:** Sandhita Roy, 02/10/2024, 7:44 am
- Modified By:** Sandhita Roy, 02/10/2024, 7:44 am
- Master-Detail Options:** Related To: Drop-Off Point, Related List Label: Volunteers, Sharing Setting: Read/Write (Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records).

## **Creation of Master Detail Relationship Field on Execution Details Object :**

1. Go to **setup** >> click on **Object Manager** >> type object name(**Execution Details**) 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 “**Volunteer**” and click **next**.
5. **Field Name** : Volunteer
6. **Field label** : Auto generated
7. **Next >> Next >> Save**.

## **Creation of Master Detail Relationship Field on Execution Details Object :**

1. Go to **setup** >> click on **Object Manager** >> type object name(**Execution Details**) 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 “**Task**” and click next.
5. **Field Name** : Task
6. **Field label** : Auto generated
7. **Next >> Next >> Save**.

The screenshot shows the Salesforce Object Manager interface for the 'Execution Detail' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Fields & Relationships. The main content area displays the 'Fields & Relationships' section with a table showing five items. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The rows show fields such as Created By, Execution Detail Name, Last Modified By, Task, and Volunteer, each with its corresponding field name, data type (e.g., Lookup(User), Text(80)), controlling field (e.g., Task\_c, Volunteer\_c), and indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Execution Detail Name	Name	Text(80)		
Last Modified By	LastModifiedById	Lookup(User)		
Task	Task_c	Master-Detail(Task)		
Volunteer	Volunteer_c	Master-Detail(Volunteer)		

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

1. Go to **setup** >> click on **Object Manager** >> type object name(**Task**) in the search bar >> click on the object.
2. Now click on “**Fields & Relationships**” >> **New**
3. Select **Lookup relationship**
4. Select the related object “**Drop-Off Point**” and click **next**.
5. **Field Name** : **Venue**
6. **Field label** : **Venue\_\_c**
7. **Next >> Next >> Save**.

## **Creation of Lookup Relationship Field on Task Object :**

1. Go to **setup**>> click on **Object Manager** >> type object name(**Task**) in the search bar >> click on the object.
2. Now click on “**Fields & Relationships**” >> **New**
3. Select **Lookup relationship**
4. Select the related object “**Venue**” and click **next**.
5. **Field Name** : **Sponsored By**
6. **Field label** : **Auto generated**
7. **Next >> Next >> Save**.

## **Creation of Lookup Relationship Field on Task Object :**

1. Go to **setup**>> click on **Object Manager** >> type object name(**Task**) in the search bar >> click on the object.
2. Now click on “**Fields & Relationships**” >> **New**
3. Select **Lookup 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**.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and various global icons. The main content area has a header 'SETUP > OBJECT MANAGER' with a 'Task' icon. On the left, a sidebar lists various object settings like 'Page Layouts', 'Lightning Record Pages', etc. The right side displays the 'Fields & Relationships' section for the Task object. It shows 7 items, sorted by Field Label. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Drop-Off Point	Drop_Off_Point__c	Lookup(Drop-Off Point)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Sponsored By	Sponsored_By__c	Lookup(Venue)		✓
Task Name	Name	Text(80)		✓
Venue__c	Venue__c	Lookup(Drop-Off Point)		✓

## **5.2. 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:**

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 “**Phone**” and Click on **Next**
4. 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:

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 “**Long Text Area**” and Click on **Next**
4. Fill the Above as following:
5. **Field Label** : Venue Location
6. **Field Name** : Venue\_Location
7. Click on **Next >> Next >> Save**.

The screenshot shows the Salesforce Object Manager interface for the 'Venue' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main content area is titled 'Fields & Relationships' and displays a table of existing fields. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table data includes:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Contact Email	Contact_Email__c	Email		
Contact Phone	Contact_Phone__c	Phone		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Geolocation		
Owner	OwnerId	Lookup(User,Group)		✓
Venue Location	Venue_Location__c	Long Text Area(32768)		
Venue Name	Name	Text(80)		✓

## 5.3. Creation of fields for the Drop-Off point 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 “**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 “**Picklist**” and Click on **Next**
4. 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:

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 “**Number**” and Click on **Next**
4. 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.**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Distance	Distance__c	Number(14, 4)		
distance calculation	distance_calculation__c	Formula (Number)		
Drop-Off Point Name	Name	Text(80)	✓	
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Geolocation		
Location 2	Location_2__c	Geolocation		
Owner	OwnerId	Lookup(User,Group)	✓	
State	State__c	Picklist		

#### **5.4. Creation of fields for the Task 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 “**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:**

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 “**Picklist (Multi-Select)**” and Click on **Next**
4. 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:**

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 “**Number**” and Click on **Next**
4. 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:**

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 “**Text**” and Click on **Next**
4. 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:**

1. Go to **setup>> click on Object Manager >> type object name(**Task**) in search bar >> click on the object.**
2. Now click in “**Fields & Relationships**” >> **New**
3. Select Data type as a “**Phone**” and Click on **Next**
4. 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:

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 “**Picklist**” and Click on **Next**
4. 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:

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 “**Long Text Area**” and Click on **Next**
4. Fill the Above as following:
  - **Field Label** : Feedback
  - **Field Name** : Feedback
  - Click on **Next >> Next >> Save.**

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. On the left, a sidebar lists various object settings like Page Layouts, Lightning Record Pages, Buttons, etc. The main content area is titled 'Fields & Relationships' for the 'Task' object. It displays a table of existing fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Date	Date_c	Date		
Distance	Distance_c	Number(14, 4)		
Drop-Off Point	Drop_Off_Point_c	Lookup(Drop-Off Point)		
Feedback	Feedback_c	Long Text Area(32768)		
Food Category	Food_Category_c	Picklist (Multi-Select)		
Last Modified By	LastModifiedById	Lookup(User)		
Name of the Person	Name_of_the_Person_c	Text(20)		
Number of People Served	Number_of_People_Served_c	Number(18, 0)		

## **5.5. 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.**

### **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:**

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 “**Date**” and Click on **Next**
4. 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:**

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 “**Number**” and Click on **Next**
4. 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:**

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 “**Email**” and Click on **Next**
4. 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:**

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 “**Number**” and Click on **Next**
4. 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:**

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 “Text Area (Long)” and Click on **Next**
4. 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:

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 “**Date**” and Click on **Next**
4. Fill the Above as following:
  - **Field Label** : Date of Birth
  - **Field Name** : Date\_of\_Birth
  - Click on **Next >> Next >> Save.**

Fields & Relationships 12 Items, Sorted by Field Label				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Long Text Area(32768)		
Age	Age_c	Number(18, 0)		
Available On	Available_On_c	Date		
Contact Number	Contact_Number_c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Date of Birth	Date_of_Birth_c	Date		
Drop-Off Point	Drop_Off_Point_c	Master-Detail(Drop-Off Point)		
Email	Email_c	Email		
Gender	Gender_c	Picklist		

#### 5.6. 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.**

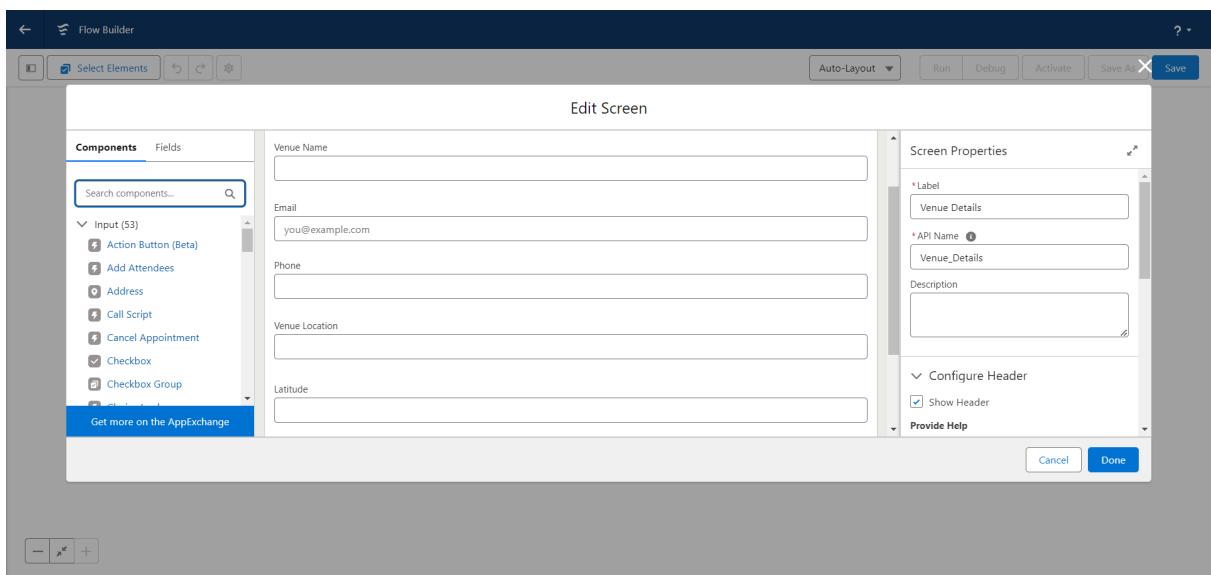
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Execution Detail Name	Name	Text(80)		
Execution ID	Execution_ID_c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Task	Task__c	Master-Detail(Task)		
Volunteer	Volunteer__c	Master-Detail(Volunteer)		

## 6. Flows

### 6.1. 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 the **screen** element.
4. Under the Screen Properties:
  - **Label** : Venue Details
  - **API Name** : Venue\_Details
5. Now let's add components in this flow. Click on **Text Component** and name it as:
  - **Label** : Venue Name
  - **API Name** : Venue\_Name
6. Click on **Email Component** and name it as:
  - **Label** : Email
  - **API Name** : Contact\_Email

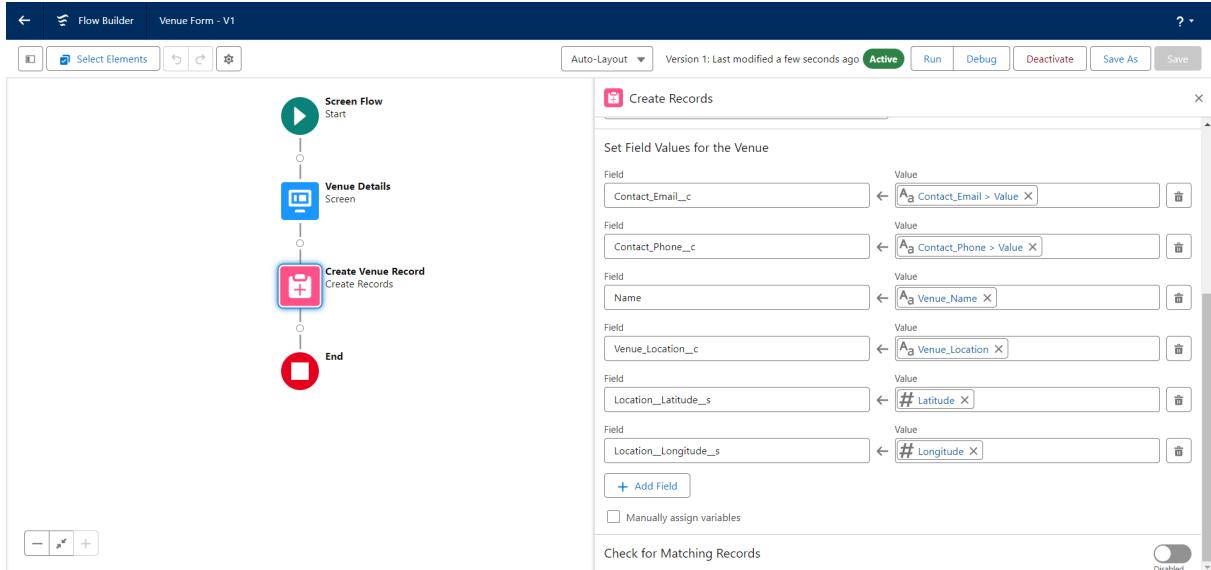
7. Click on **Phone** Component and name it as:
  - **Label** : Phone
  - **API Name** : Contact\_Phone
8. Click on **Text** Component and name it as:
  - **Label** : Venue Location
  - **API Name** : Venue\_Location
9. Click on **Number** Component and name it as:
  - **Label** : Latitude
  - **API Name** : Latitude
10. Click on **Number** Component and name it as:
  - **Label** : Longitude
  - **API Name** : Longitude
11. Next click on **Done**. This would like below



12. Click on the '+' icon in between Venue details and end, and click on **Create records** 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:



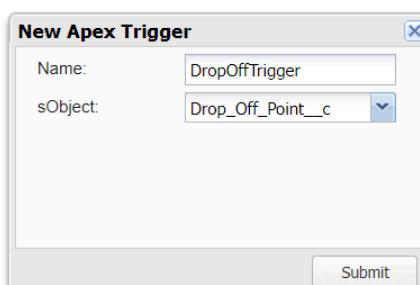
15. Click on **Save as**:

- **Flow Label** : Venue Form
- **Flow API Name** : Venue\_Form

## 7. Trigger

### 7.1. 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.
5. **Enter Name** : DropOffTrigger  
**sObject**: Drop-Off Point
6. Click on **Submit**.

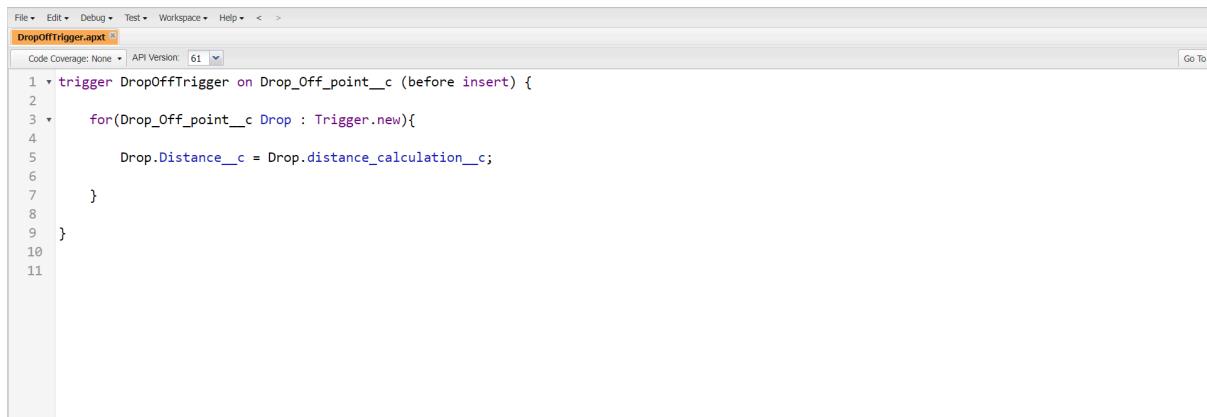


## 7.2. Trigger Code

(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;
    }
}
```



## 8. Profiles

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

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
4. Then click on **Save**

The screenshot shows the Salesforce Setup interface under the Profiles section. A specific profile named 'NGOs Profile' is selected. The 'Profile Detail' section includes fields for Name (NGOs Profile), User License (Salesforce Platform), and Description. The 'Page Layouts' section lists assignments for different object types, such as Global, Lead, Location, and Location Group Assignment.

## 9. Creation of Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. In our Project we consider them as NGO's.

### 9.1. 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:
  - **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
3. Click on **Save**

## 9.2. 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 NGOs.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00dy00000caojhmay.ngfrrdb73k@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input checked="" type="checkbox"/>	Iksha_Foundation_Iksha_Foundation	iksh	ikshafoundation12345@sb.com		<input checked="" type="checkbox"/>	NGOs Profile
<input type="checkbox"/>	J_Sam	sj	sj52@gmail.com	Store Head	<input checked="" type="checkbox"/>	Store Supervisor
<input checked="" type="checkbox"/>	NSS_NSS	nss	nss12345@gmail.com		<input checked="" type="checkbox"/>	NGOs Profile
<input type="checkbox"/>	Roy_Sandhya	SRoy	roy@academy.edu		<input checked="" type="checkbox"/>	System Administrator
<input checked="" type="checkbox"/>	Street_Cause_Street_Cause	scause	sc12345@gmail.com		<input checked="" type="checkbox"/>	NGOs Profile
<input type="checkbox"/>	User_Integration	integ	integration@00dy00000caojhmay.com		<input checked="" type="checkbox"/>	Analytics_Cloud_Integration_User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00dy00000caojhmay.com		<input checked="" type="checkbox"/>	Analytics_Cloud_Security_User

# 10. Public Groups

## 10.1. 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**

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded to show 'Users' and 'Public Groups' under 'Setup'. The main area is titled 'Public Groups' and shows a group named 'Iksha'. The group details include 'Label: Iksha', 'Group Name: Iksha', and 'Grant Access Using Hierarchies' checked. The 'Members' section lists 'Sandhya Roy' and 'Iksha Foundation Iksha\_Foundation' with 'Type: User'.

## 10.2. 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.

The screenshot shows the Salesforce Setup interface with the 'Public Groups' list. The table displays three groups: 'Iksha' (Created by Roy\_Sandhya, 02/10/2024, 11:55 am), 'NSS' (Created by Roy\_Sandhya, 02/10/2024, 11:57 am), and 'Street\_Cause' (Created by Roy\_Sandhya, 02/10/2024, 11:58 am). The table includes columns for Action, Label, Group Name, Created By, and Created Date.

Action	Label	Group Name	Created By	Created Date
Edit   Del	Iksha	Iksha	Roy_Sandhya	02/10/2024, 11:55 am
Edit   Del	NSS	NSS	Roy_Sandhya	02/10/2024, 11:57 am
Edit   Del	Street_Cause	Street_Cause	Roy_Sandhya	02/10/2024, 11:58 am

## 11. Report Types

A Report Type determines which set of records will be available in a report. Each report is based on a particular report type, selected first when creating a report. Every report type has a primary object and one or more related objects, all of which must be linked together directly or indirectly.

- A report type cannot include more than 4 objects.
- Once a report is created, its report type cannot be changed.

There are 2 types of report types:

### 1. Standard Report Types:

- Automatically included with standard objects and custom objects where "Allow Reports" is checked.
- Cannot be customized and automatically include standard and custom fields for each object within the report type.
- Created when an object or a relationship is created.
- **Note:** Standard report types always have inner joins.

### 2. Custom Report Types:

- Created by an administrator or user with "Manage Custom Report Types" permission when standard report types cannot specify which records will be available in reports.
- Allows specification of objects that will be available in a particular report.
- The primary object must have a relationship with other objects present in the report type, either directly or indirectly.

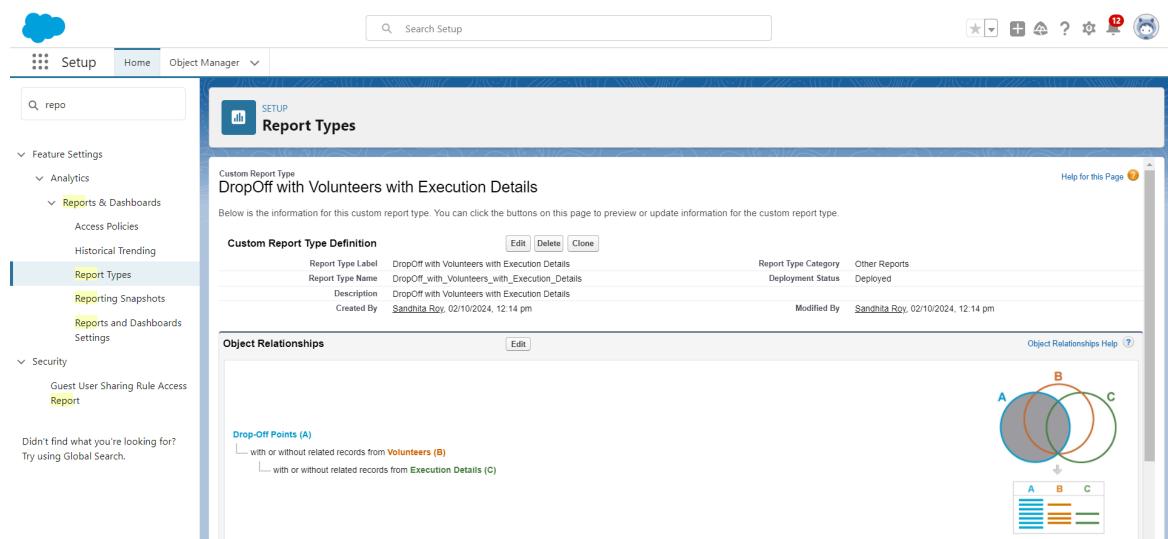
### 11.1. Creation of Report Types

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 Drop Off Points
  - **Report Type Label** : DropOff with Volunteers with Execution Details

- **Report Type Name :**  
DropOff\_with\_Volunteers\_with\_Execution\_Details
- **Description :** DropOff with Volunteers with Execution Details
- **Store in Category :** Select Other Reports
- **Deployment Status :** Deployed

3. Click on **Next**

4. Near Click to relate another Object Select **Volunteers** 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 **Execution Details**.
7. Now click on **Save**.



## 12. Reports

Reports in Salesforce are lists of records that meet specific criteria, providing answers to particular questions. These records are displayed in a table format that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

### 1. Tabular Reports:

- The most basic report format, displaying rows of records in a table with a grand total.
- Easy to set up but cannot be used to create groups of data or charts and cannot be used in Dashboards.
- Primarily used to generate simple lists or lists with a grand total.

## **2. Summary Reports:**

- The most commonly used report format, allowing the grouping of rows of data, viewing subtotals, and creating charts.

## **3. Matrix Reports:**

- The most complex report format, summarizing information in a grid format.
- Allows records to be grouped by both columns and rows.
- Can be used to generate dashboards and add charts.

## **4. Joined Reports:**

- Allows the creation of different views of data from multiple report types.
- Data in joined reports is organized in blocks, each acting as a subreport with its own fields, columns, sorting, and filtering.
- Used to group and show data from multiple report types in different views.

### **12.1. Creation of Report on Venue with DropOff with Volunteer**

1. Go to the app(**FoodLink**) >> 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 : **DropOff with Volunteers with Execution Details**
5. Then click on **Start Report**.
6. In **GROUP ROWS** : Add Volunteer Name
7. In **Columns** : Add Drop-Off point Name, Execution Detail Name, Distance.
8. Now click on **Save & Run**.
9. Give Label as :
  - **Report Name** : venue and Drop Off point
  - **Report Unique Name** : Auto Populated
10. Click on **Select Folder** and select **Custom Report**, then click on **Save**.

Report: DropOff with Volunteers with Execution Details  
venue and Drop Off point

Total Records	Total Distance		
5	6,500.8400		
<input type="checkbox"/> Amar (1)	K Mall	-	1,021.1800
<b>Subtotal</b>			1,021.1800
<input type="checkbox"/> Amit K (1)	City Centre	Deliver	2,170.8000
<b>Subtotal</b>			2,170.8000
<input type="checkbox"/> Jay Shaw (1)	ABC	Serve	3,308.8600
<b>Subtotal</b>			3,308.8600
<input type="checkbox"/> Lisa M (1)	City Centre	-	2,170.8000
<b>Subtotal</b>			2,170.8000
<input type="checkbox"/> W Singh (1)	K Mall	-	1,021.1800
<b>Subtotal</b>			1,021.1800
<b>Total (5)</b>			6,500.8400

Row Counts  Detail Rows  Subtotals  Grand Total

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

1. Go to the app(**FoodLink**) >> 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
9. Click on **Select Folder** and select **Custom Report**, then click on **Save.**

Report: Tasks with Execution Details and Volunteers  
**Volunteer Task**

Total Records
2
<input type="checkbox"/> 1 Record Count 1 0 1
<input type="checkbox"/> 2 Record Count 0 1 1
<b>Total</b> Record Count 1 1 2

Details (2 Rows) Click an intersection in the table above to filter details.

Volunteer: Volunteer Name	Task: Task Name	Execution Detail: Execution Detail Name	Task: Owner Name	Task: Created Date
1 Jay Shaw	Serve	Serve	Sandhita Roy	02/10/2024
2 Amit K	Deliver	Deliver	Sandhita Roy	02/10/2024
3				

## 13. Dashboards

Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they're able to view your dashboard's data supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

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

1. Go to the app(**FoodLink**) >> 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)
9. Now click on **Save**.

The screenshot shows the FoodLink application interface. At the top, there is a navigation bar with links for Home, Venues, Drop-Off Points, Tasks, Volunteers, Execution Details, Reports, and Dashboards. The 'Dashboards' link is highlighted. Below the navigation bar, the main content area displays a custom dashboard titled 'Organization Details'. The dashboard header includes a 'Search...' input field and several icons for refresh, edit, and other actions. The main content area features a table titled 'venue and Drop Off point'. The table has three columns: 'Drop-Off Point Name', 'Execution Detail Name', and 'Distance'. The data in the table is as follows:

Drop-Off Point Name	Execution Detail Name	Distance
ABC	Serve	3.3089k
City Centre	Deliver	2.1708k
City Centre	-	2.1708k
K Mall	-	1.0212k
K Mall	-	1.0212k

At the bottom of the table component, there is a link labeled 'View Report (venue and Drop Off point)'. The background of the dashboard is light blue with a subtle wavy pattern.

## 13.2. 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)
5. Now click on **Save**.

The screenshot shows the FoodLink dashboard interface. At the top, there is a navigation bar with links for Home, Venues, Drop-Off Points, Tasks, Volunteers, Execution Details, Reports, and Dashboards. Below the navigation bar, there is a search bar and a toolbar with various icons. The main content area contains two components:

- venue and Drop Off point**: A table component showing the relationship between drop-off points and execution details. The data is as follows:

Drop-Off Point Name	Execution Detail Name	Distance
ABC	Serve	3.3089k
City Centre	Deliver	2.1708k
City Centre	-	2.1708k
K Mall	-	1.0212k
K Mall	-	1.0212k

- Volunteer Task**: A bar chart component showing the count of volunteer tasks by rating. The data is as follows:

Rating	Record Count
1	1
2	1
5	1

## 13.3 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**.

The screenshot shows the FoodLink dashboard with an additional image component. The dashboard structure remains the same as the previous screenshot, but now includes a third component on the right side:

- venue and Drop Off point**: The table component showing the relationship between drop-off points and execution details.
- Volunteer Task**: The bar chart component showing the count of volunteer tasks by rating.
- Image**: An image component displaying a close-up of a person's hands serving food from a bowl into another bowl, with various vegetables like carrots and bell peppers visible on the table.

## 14. Sharing Rules

### 14.1. 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**.

## 15. Home Page

### 15.1. 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 Form**
6. Near Components search for **Dashboard**, then Drag and Drop it in first Section.

7. Click on **Save** and **Activation**, then click on **App Default**, then **Add Assignments**.
8. Add **FoodLink App** and then **Save**.
9. FoodLink Home Page would Look Like this.

The screenshot shows the FoodLink application interface. At the top, there's a navigation bar with links for Home, Venues, Drop-Off Points, Tasks, Volunteers, Execution Details, Reports, and Dashboards. A search bar is also present. On the left, there's a sidebar titled "Organization Details" showing a table of venue and drop-off points. The main area features a "Volunteer Task" chart with a rating scale from 1 to 5 and a photo of a person holding a bowl of food. On the right, there's a "Venue Form" sidebar with fields for Venue Name, Email, Phone, Venue Location, Latitude, and Longitude, along with a "Next" button.

Drop-Off Point Name	Execution Detail N...	Dist...
ABC	Serve	3.3085
City Centre	Deliver	2.1708
City Centre	-	2.1708
K Mall	-	1.0212
K Mall	-	1.0212

## CONCLUSION

By leveraging Salesforce CRM, this project - FoodLink, successfully established a streamlined and transparent system for managing surplus food donations. The platform facilitated efficient coordination between food donors, volunteers, and distribution networks, ensuring timely delivery of leftover food to communities in need. With features like real-time tracking, automated workflows, and data-driven insights, the system significantly improved the efficiency of food redistribution efforts while minimizing food waste.

The project not only addressed the critical issue of food insecurity but also maximized the utilization of available resources by simplifying the donation process. By creating a seamless connection between surplus food sources and recipients, the platform provided a scalable and sustainable solution for reducing hunger in underserved communities. FoodLink underscores the potential of technology to drive positive social change, proving that with the right tools, we can make significant strides in addressing global challenges like food insecurity.