### PROJECT TITLE:To Supply Leftover Food to Poor

Steps to follow:

### 1.Salesforce developer account creation

2.Creation of objects

### Create Venue Object

### Create Drop-Off Point Object

### Create Task Object

### Create Volunteer object

### Create Execution Details Object

3.Tabs

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

### Creating a Custom Tab

### Creating Remaining Tabs

4.Creation of the Lighting App

**To create a lightning app page:**

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

2.Fill the app name in app details and branding as follow  
App Name : FoodConnect  
Developer Name : This will auto populated  
Image : optional (if you want to give any image you can otherwise not mandatory) Primary color hex value : keep this default.

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

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 search bar >> click on the arrow button >> save & finish.

5.Creation of Feilds

### Creation of Relationship fields in objects

### Creation of fields for the Venue object

### Creation of fields for the Drop-Off point object

### Creation of fields for the Task object

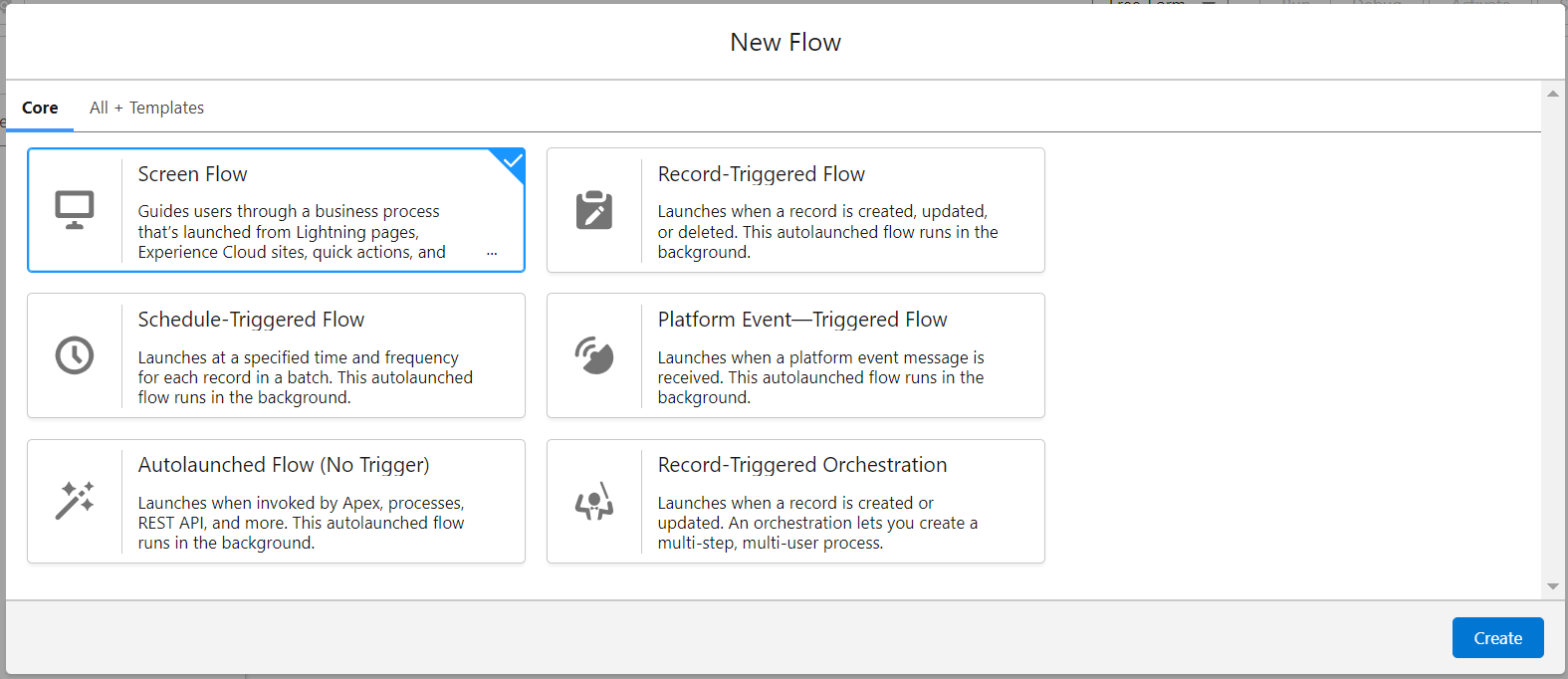
### Creation of fields for the Volunteer object

### Creation of fields for the Execution Details object

6.Creation of Flows

### Create Flow to create a record in Venue object

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



1. Click on the ‘+’ icon in between start and end, and click on screen element.
2. Under the Screen Properties:

Label : Venue Details

API Name : Venue\_Details

1. Now lets add components in this flow. Click on Text Component and name it as:

Label : Venue Name

API Name : Venue\_Name

1. Click on Email Component and name it as:

Label : Email

API Name : Contact\_Email

1. Click on Phone Component and name it as:

Label : Phone

API Name : Contact\_Phone

1. Click on Text Component and name it as:

Label : Venue Location

API Name : Venue\_Location

1. Click on Number Component and name it as:

Label : Latitude

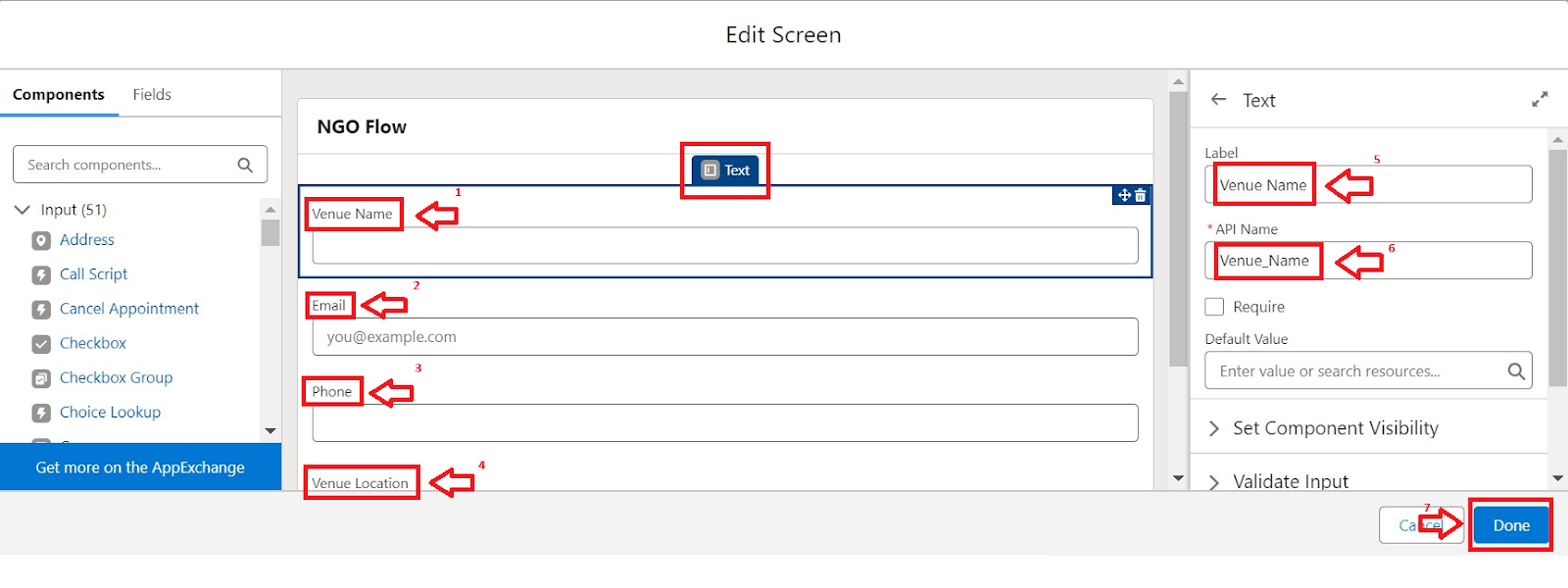
API Name : Latitude

1. Click on Number Component and name it as:

Label : longitude

API Name : longitude

1. Next click on Done. This would like below



1. Click on the ‘+’ icon in between Venue details and end, and click on create record element.
2. 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}

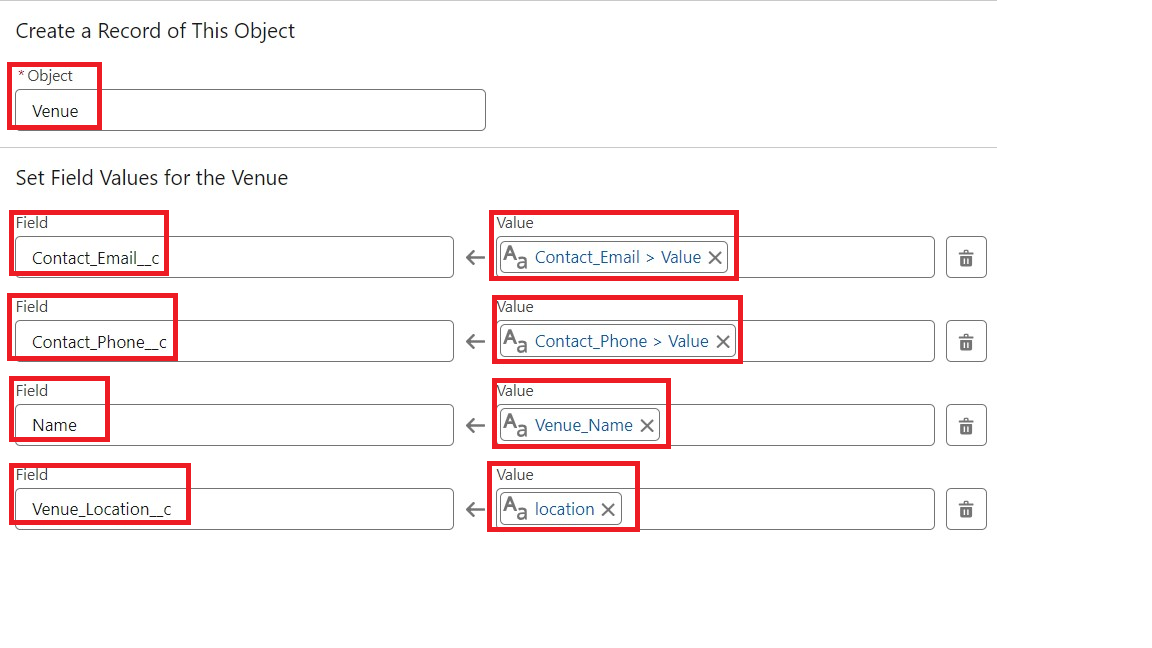
Field : Value = Name : {!Venue\_Name}

Field : Value = Venue\_Location\_\_c : {!location}

Field : Value = Location\_\_Latitude\_\_s : {!latitude}

Field : Value = Location\_\_Longitude\_\_s : {!longitude}

1. This would look like:



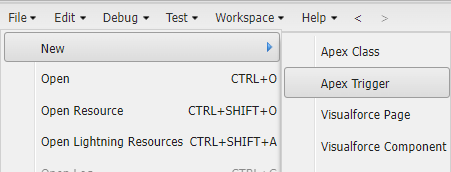
1. Click on Save as:

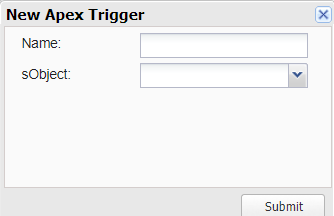
Flow Label : Venue Form

Flow API Name : Venue\_Form

7.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.





1. Enter Name : DropOffTrigger

sObject: Drop-Off Point

1. Click on Submit.

### 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

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

Then click on Save

### Creation of Users

In our Project we consider them as NGO’s

### Creation of User1

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

First Name : Iksha Foundation

Last Name : Iksha\_Foundation

Alias : iiksh

Email : Give Your Email

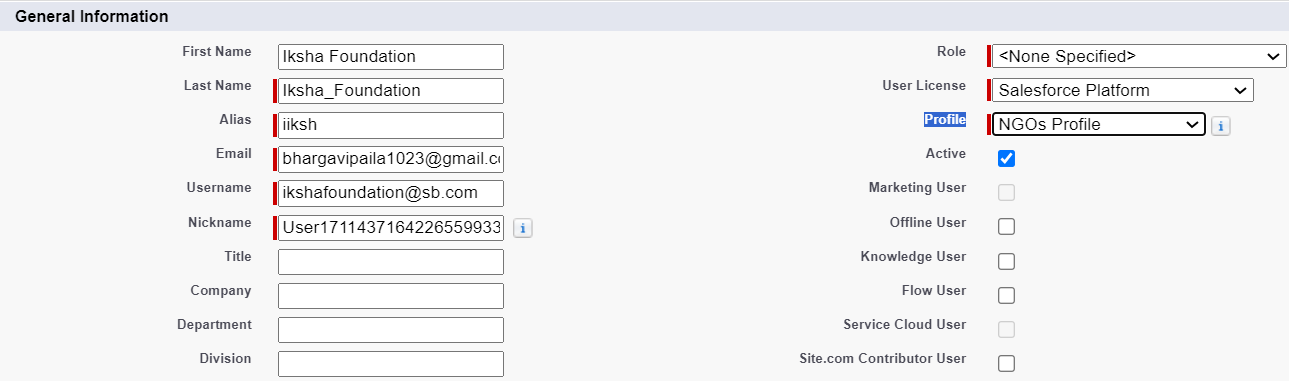
Username : [ikshafoundation@sb.com](mailto:ikshafoundation@sb.com) (give the username different)

Nickname : Auto Populated

User License : Salesforce Platform

Profile : NGOs Profile

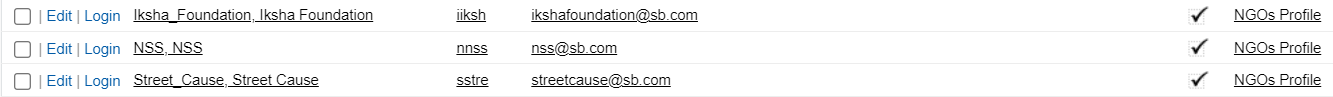
Active : Check



1. Click on Save

### Creation of User2, User3

1. Create another Two Users by following steps in Activity - 1 with similar User License and Profile.
2. Give Different First Name, Last Name based on Different NGO’s.



9.Public Profiles

### 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

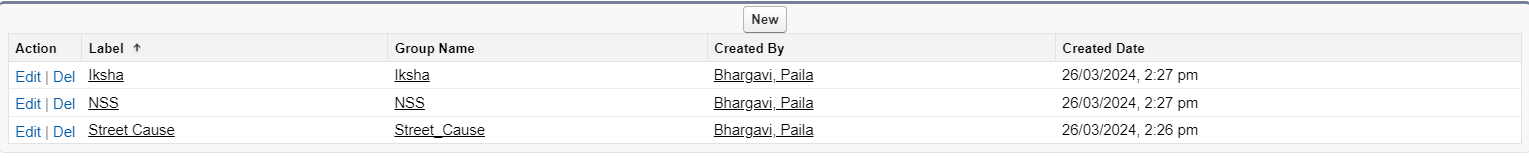
Group Name : Iksha

Grant Access Using Hierarchies : Check

1. In Search, Select Users.
2. In Selected Members Add Iksha Foundation and System Administrator

### 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.



10.Creation of Report Types

1. Go to setup page >> type Report Types in Quick Find bar >> click on Report Types >> click on Continue >> Click on New Custom Report Type.
2. In Define the Custom Report Type:

Primary Object : Select Venues

Report Type Label : Venue with DropOff with Volunteer

Report Type Name : Venue\_with\_DropOff\_with\_Volunteer

Description : Venue with DropOff with Volunteer

Store in Category : Select Other Reports

Deployment Status : Deployed

1. Click on Next
2. Near Click to relate another Object Select Drop-Off Points.
3. And also select "A" records may or may not have related "B" records.
4. Now again Near Click to relate another Object Select Volunteers.
5. Now click on Save.

11.Reports

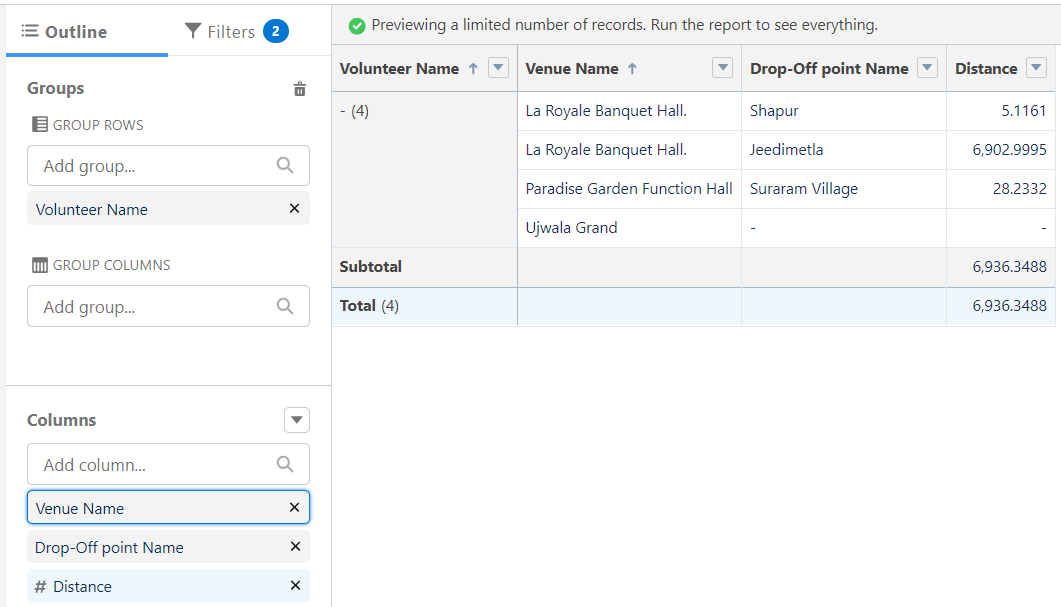
### Creation of Report on Venue with DropOff with Volunteer

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

Folder Label : Custom Reports

Folder Unique Name : CustomReports

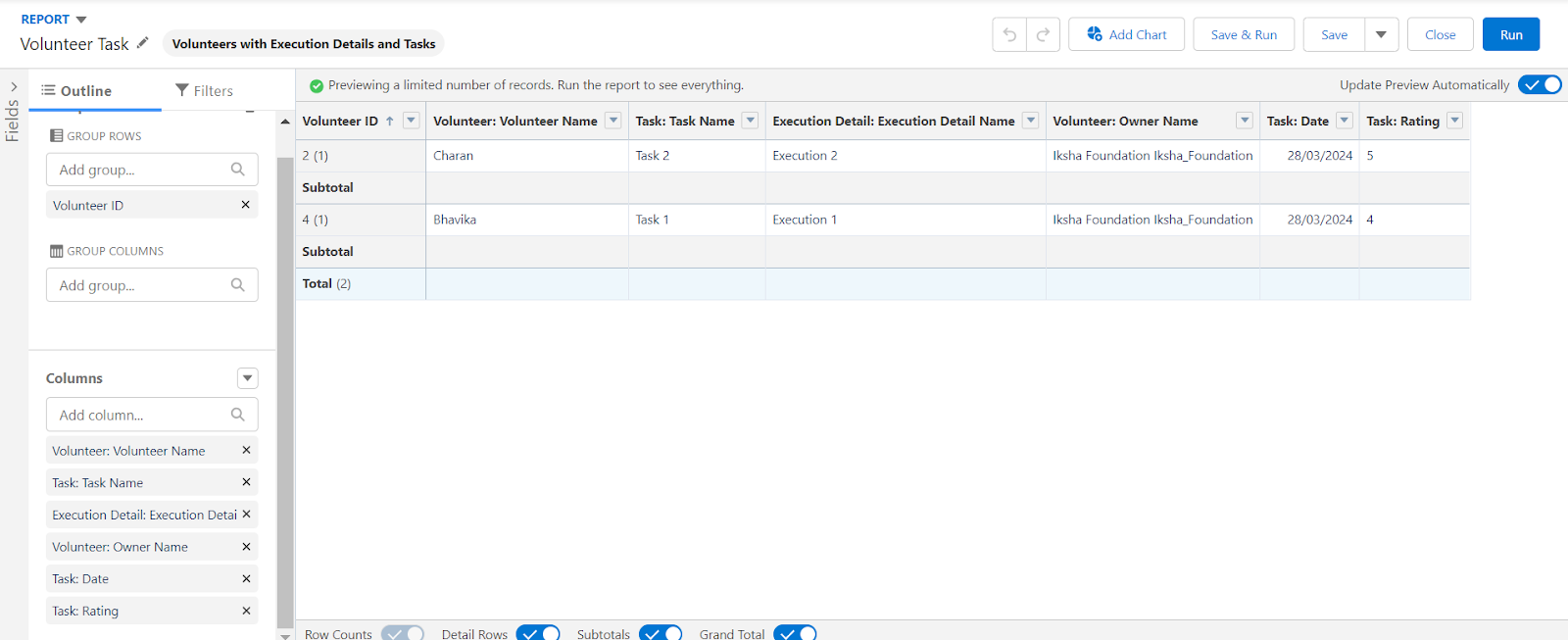
1. Open Custom Reports and click on New Report
2. Select Report Type : Venue with DropOff with Volunteer
3. Then click on Start Report.
4. In GROUP ROWS : Add Volunteer Name
5. In Columns : Add Venue Name, Drop-Off point Name, Distance.



1. Now click on Save & Run.
2. Give Label as :
3. Report Name : venue and Drop Off point
4. Report Unique Name : Auto Populates
5. Click on Select Folder and select Custom Report, then click on Save.

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

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



1. Now click on Save & Run.
2. Give Label as :

Report Name : Volunteer Task

Report Unique Name : Auto Populated

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

12.Dashboards

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

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

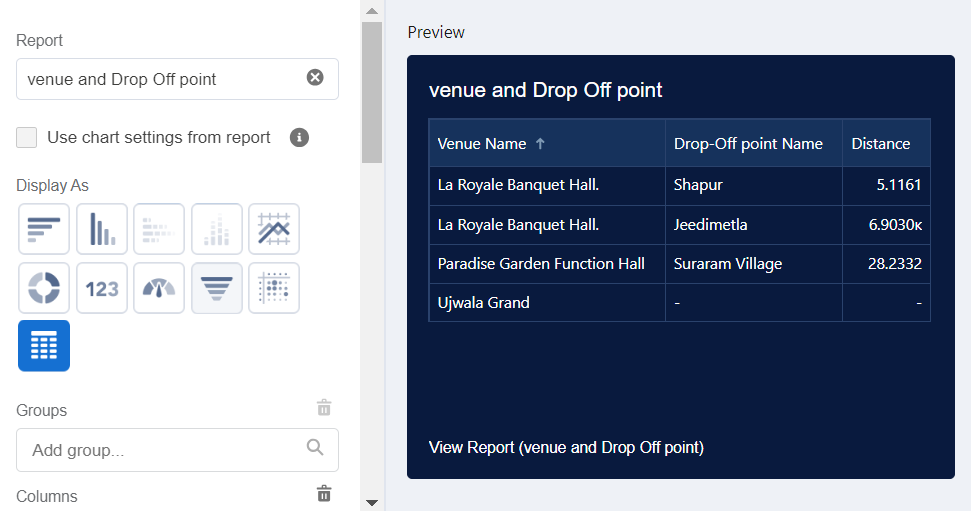
Folder Label : Custom Dashboards

Folder Unique Name : Auto Populated

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

Display As : Select Lightning Table

Component Theme : Select Dark (Optional)



1. 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)

13.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

1. Select your rule type : Select Based on criteria.
2. Select which records to be shared:

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

1. Select the users to share with : Near Share With

Public Groups : Iksha

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

Label : Rule 2

Rule Name : Rule\_2

1. Select your rule type : Select Based on criteria.
2. Select which records to be shared:

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

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

1. Select the users to share with : Near Share With

Public Groups : NSS

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

Label : Rule 3

Rule Name : Rule\_3

1. Select your rule type : Select Based on criteria.
2. Select which records to be shared:

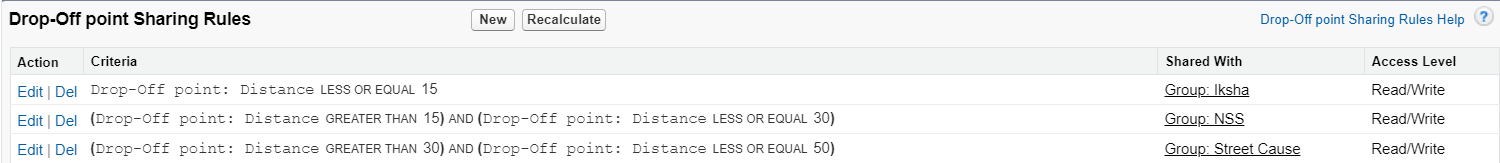
Field : Operator : Value = Distance : greater than : 30

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

1. Select the users to share with : Near Share With

Public Groups : Street Cause

1. Click on Save.



14.Creation of Home Page

1. Go to setup >> type Lightning App Builder in quick find box >> Click on the Lightning App Builder and Select the New.
2. Select Home Page and give Label as HOME Page.
3. Select Standard Home Page.
4. Near Components search for Flow and Drag and Drop in Right Side Section..
5. On the right hand side:

Flow : Venue Flow

1. Near Components search for Dashboard, then Drag and Drop it in first Section.
2. Click on Save and Activation, then click on App Default, then Add Assignments.
3. Add FoodConnect App and then Save.
4. FoodConnect Home Page would Look Like this.

Now click on save.

### 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

1. Click on Select Folder and then Save.

### Conclusion

By leveraging the Salesforce platform, the project successfully established a streamlined and transparent system for managing surplus food donations. Through efficient coordination with volunteers and timely delivery to beneficiaries, the project effectively addressed food insecurity while maximizing the utilization of available resources.