

# **TO SUPPLY LEFTOVER FOOD TO POOR**

**College Name:** Rathinam College of Liberal Arts & Science @ Tips Global

**College Code:** CD

**TEAM ID:** NM2025TMID

## **TEAM MEMBERS:**

**Team Leader Name:** VALTINA. A

**Email:** valtina.aid23t@rathinam.in

**Team Member 1 Name:** ARUNKUMAR ARUNACHALAM

**Email:** arunkumara.bca23t@rathinam.in

**Team Member 2 Name:** THARIKA. S

**Email:** tharika.aid23t@rathinam.in

**Team Member 3 Name:** AGNEESHWAR .A

**Email:** agneeshwar.aid23t@rathinam.in

# 1. INTRODUCTION

## 1.1 PROJECT OVERVIEW

*Food Connect* is a Salesforce-based application that bridges the gap between surplus food and hungry communities by connecting donors such as restaurants, canteens, and households with NGOs and volunteers in real time. Leveraging Salesforce's automation and analytics, the app ensures efficient food distribution through smart matching, live tracking, and impact reporting. By transforming leftover food into nourishment, *Food Connect* not only minimizes food waste but also fosters a sustainable ecosystem aimed at building hunger-free communities.

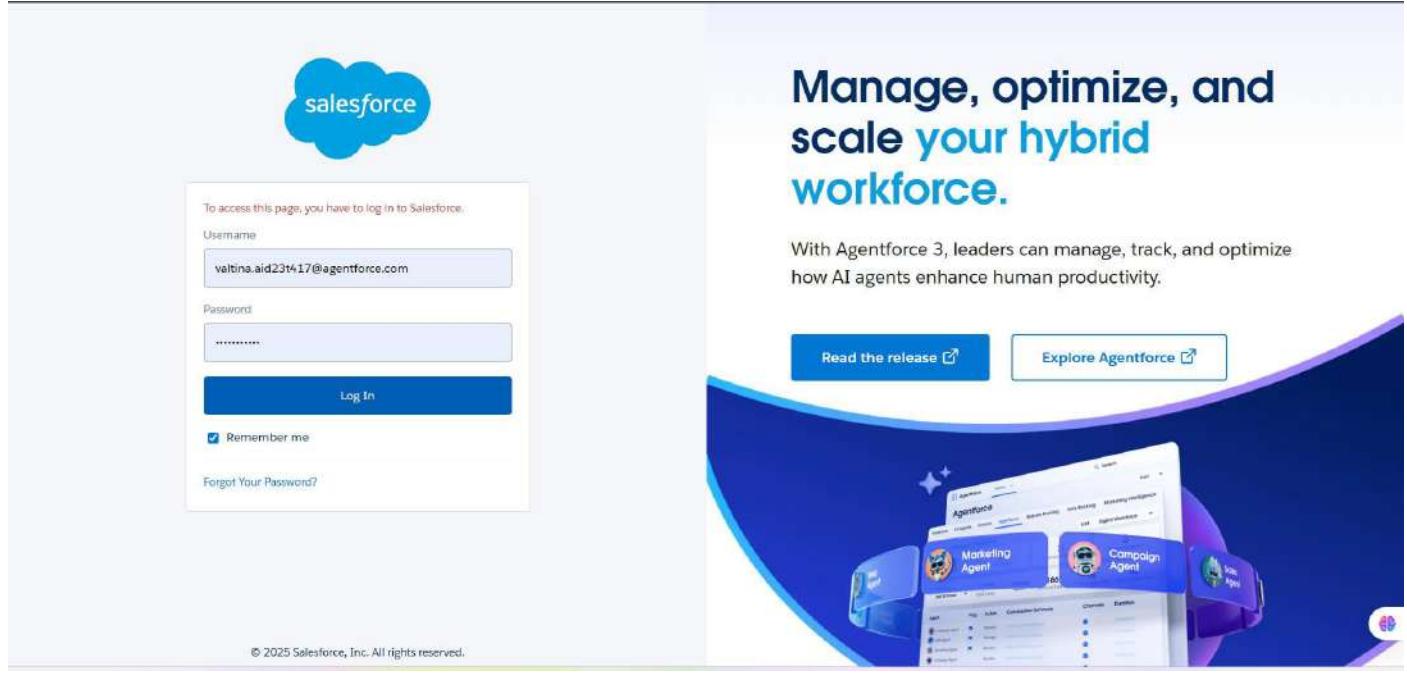


## 1.2 OBJECTIVE

- To minimize food wastage by effectively utilizing surplus food.
- To create a reliable connection between food donors and NGOs or volunteers.
- To ensure timely distribution of leftover food to people in need.
- To leverage Salesforce technology for real-time tracking and automation.
- To provide transparency and accountability in food donation and distribution.
- To promote social responsibility among individuals and organizations.
- To contribute towards achieving zero hunger and sustainable communities.

## 1.3 CREATION & DEVELOPMENT PHASE

- Salesforce account is already created and log in

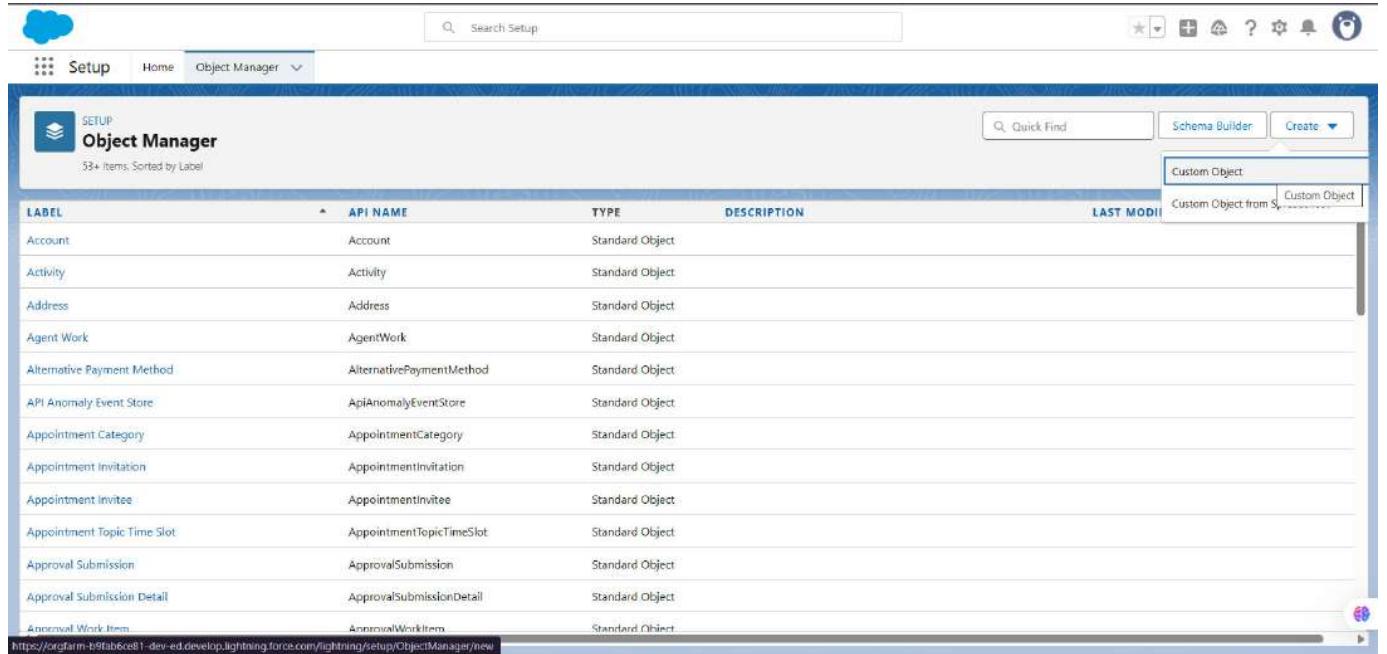


The image shows the Salesforce Setup Home page. The left sidebar includes links for Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, Administration (Users, Data, Email), and Platform Tools (Subscription Management). The main content area displays a 'Data Cloud' section with a 'Watch Video' and 'Let's Go' button, and a 'Most Recently Used' table with 10 items:

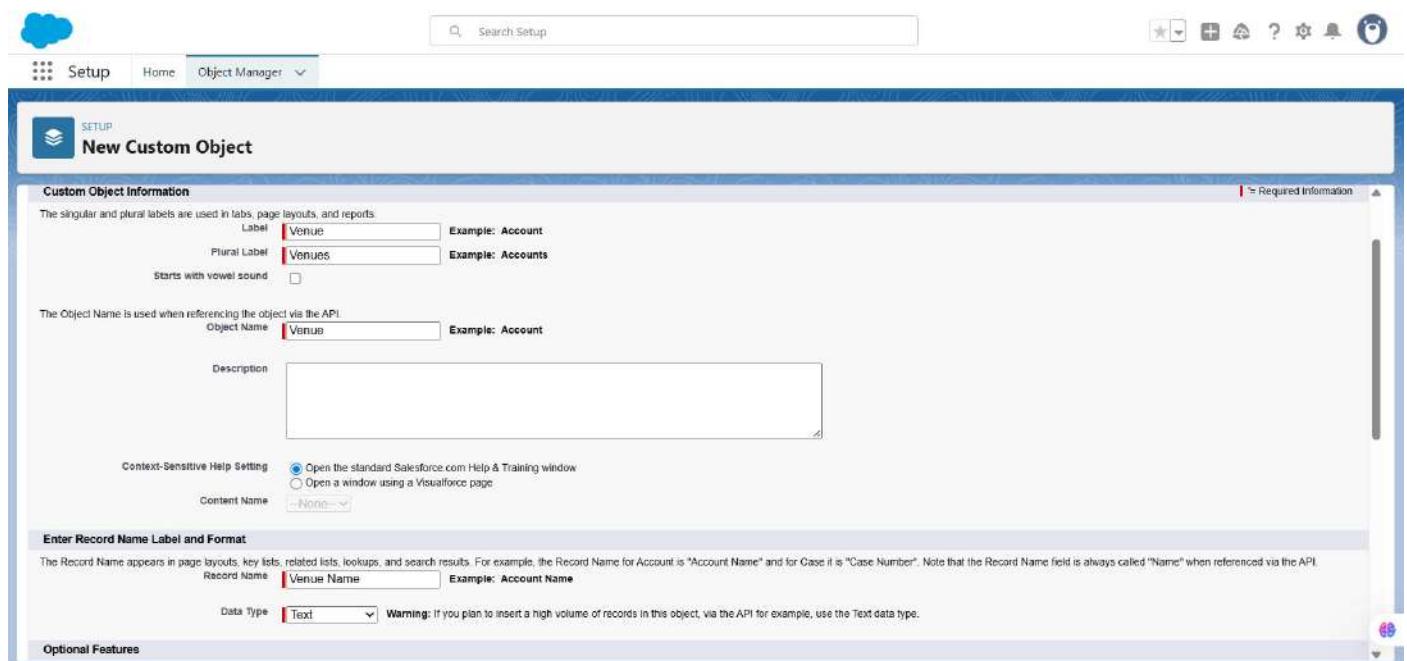
NAME	TYPE	OBJECT
SFDIC_DevConsole	Debug Level	
AddPrimaryContactTest	Apex Class	
AddPrimaryContact	Apex Class	

2) Create separate objects in the object manager of set up page using the *create* option

a) Venue Object



The screenshot shows the Salesforce Setup Object Manager page. The title bar includes 'SETUP' and 'Object Manager'. The main area displays a table of objects with columns: LABEL, API NAME, TYPE, DESCRIPTION, and LAST MODIFIED. The table lists various standard objects such as Account, Activity, Address, Agent Work, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Approval Submission, Approval Submission Detail, and Annual Work Item. A 'Create' button is visible in the top right corner.



The screenshot shows the 'New Custom Object' page in the Salesforce Setup. The title bar includes 'SETUP' and 'Object Manager'. The main area is titled 'New Custom Object' and contains several configuration sections:

- Custom Object Information:** Fields include 'Label' (Venue), 'Plural Label' (Venues), and a checkbox for 'Starts with vowel sound'.
- Object Name:** Field labeled 'Object Name' with value 'Venue'.
- Description:** A large text input field.
- Context-Sensitive Help Setting:** Radio buttons for 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'.
- Content Name:** A dropdown menu showing 'None'.
- Enter Record Name Label and Format:** A note about record names and an example for 'Record Name' (Venue Name) with 'Example: Account Name'.
- Data Type:** A dropdown menu showing 'Text'.
- Optional Features:** A section with a warning message: 'Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.'

<https://orgfarm-b9fab6ce81-dev-ed.lightning.force.com/lightning/setup/ObjectManager/new>

The screenshot shows the 'New Custom Object' page in Salesforce Setup. It includes sections for 'Optional Features' (Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups, Enable Licensing), 'Object Classification' (Allow Sharing, Allow Bulk API Access, Allow Streaming API Access), 'Deployment Status' (In Development, Deployed), 'Search Status' (Allow Search), and 'Object Creation Options' (Add Notes and Attachments related list to default page layout, Launch New Custom Tab Wizard after saving this custom object). A 'What is this?' link is visible in the top right.

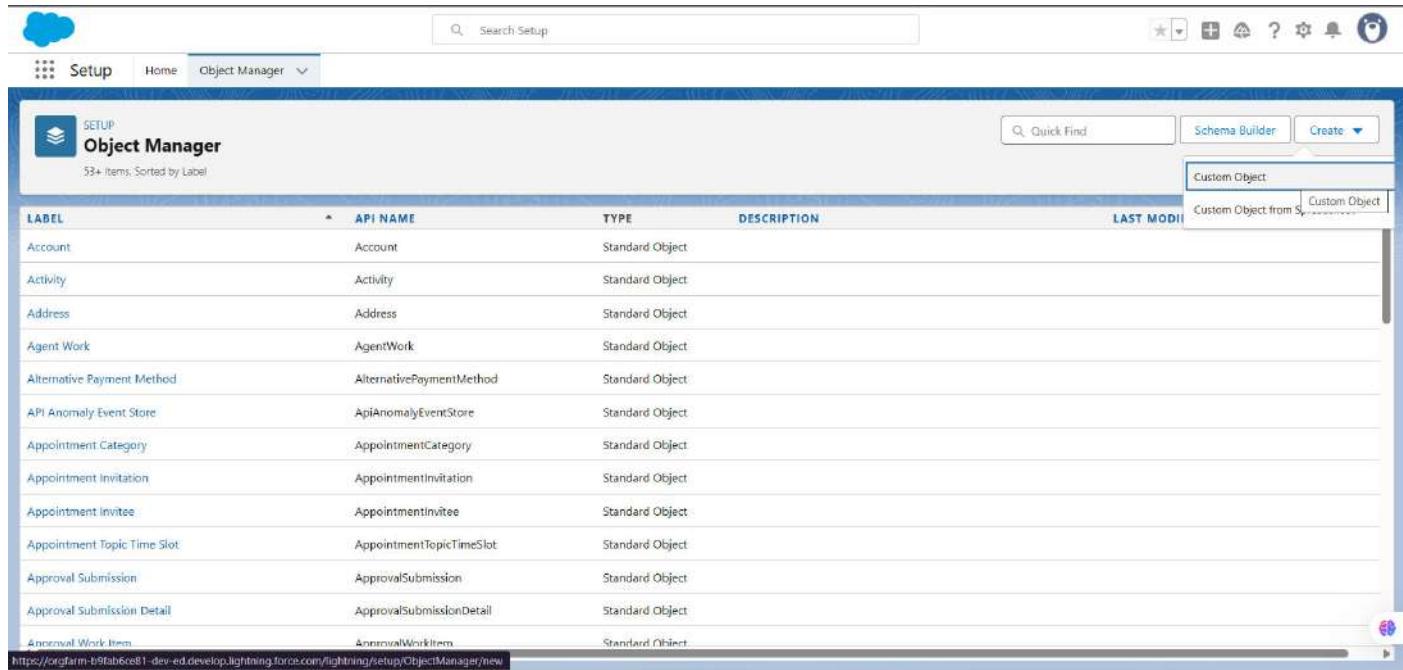
<https://orgfarm-b9fab6ce81-dev-ed.lightning.force.com/lightning/sObject/Venue/edit>

The screenshot shows the 'Venue' object details page in the Object Manager. The left sidebar lists fields like Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main panel displays the 'Details' tab with fields: Description, API Name (Venue\_c), Singular Label (Venue), Plural Label (Venues), Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window.

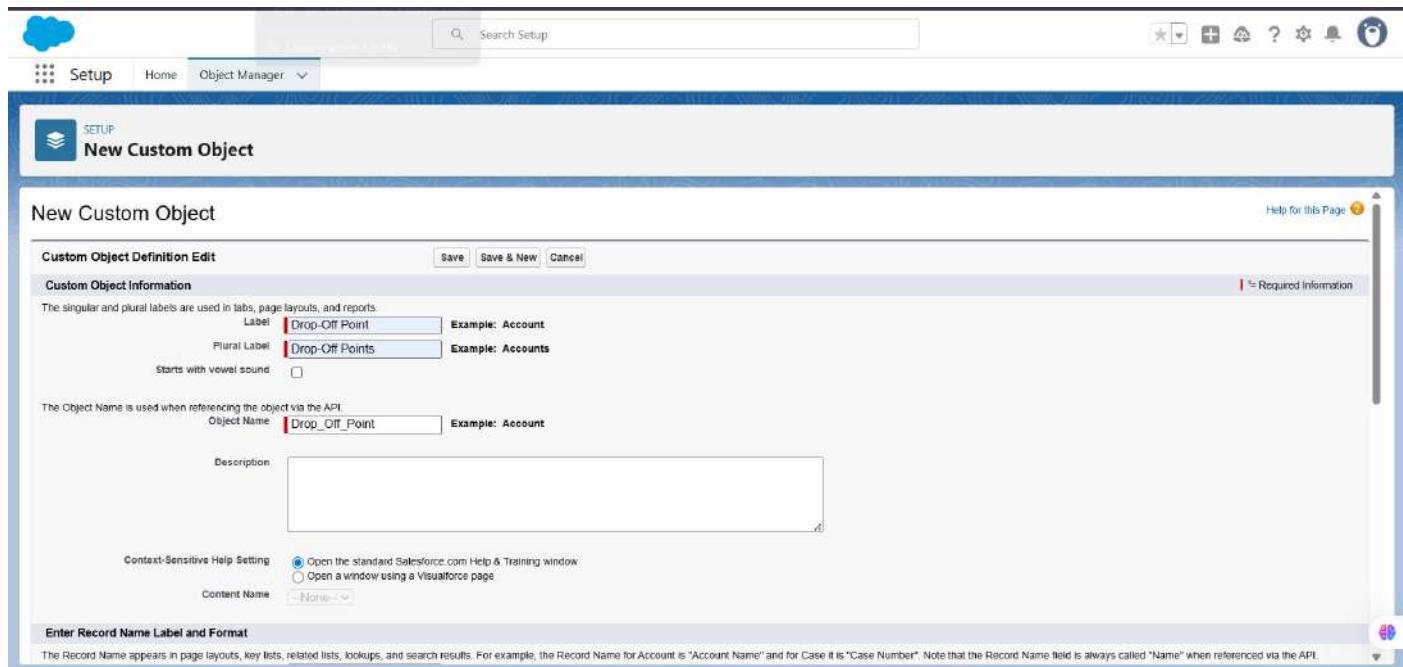
<https://orgfarm-b9fab6ce81-dev-ed.lightning.force.com/lightning/sObject/Venue>

The screenshot shows the 'Object Manager' page in the Object Manager. It lists one item: 'Venue' (Label: Venue, API Name: Venue\_c, Type: Custom Object, Last Modified: 9/8/2025, Deployed: checked). The page includes a search bar ('venue'), a 'Schema Builder' button, and a 'Create' button.

## b)Drop-Off Point object



The screenshot shows the Salesforce Object Manager page. At the top, there are tabs for Setup, Home, and Object Manager. The main area displays a table of standard objects with columns for Label, API Name, Type, Description, and Last Modified. The table includes rows for Account, Activity, Address, Agent Work, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Approval Submission, Approval Submission Detail, and Approval Work Item. A search bar at the top right is set to "Custom Object". The URL in the browser address bar is https://orgfarm-1-9tab6ce81-dev-ed.lightning.force.com/lightning/setup/ObjectManager/new.



The screenshot shows the "New Custom Object" definition edit page. At the top, there are tabs for Setup, Home, and Object Manager. The main area has a title "New Custom Object" and a "Custom Object Definition Edit" header with Save, Save & New, and Cancel buttons. The "Custom Object Information" section contains fields for Label (Drop-Off Point), Plural Label (Drop-Off Points), Example (Account), and a checkbox for Starts with vowel sound. The "Object Name" field is set to Drop\_Off\_Point with Example Account. Below this is a "Description" text area. The "Context-Sensitive Help Setting" section has a radio button selected for "Open the standard Salesforce.com Help & Training window". The "Content Name" dropdown is set to None. At the bottom, there is a "Enter Record Name Label and Format" section with a note about record name appearance in various contexts.

**SETUP** **New Custom Object**

**Optional Features**

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

**Object Classification**

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

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

**Deployment Status**

- In Development
- Deployed

**Search Status**

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

- Allow Search

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

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

**SETUP > OBJECT MANAGER**

**Drop-Off Point**

**Details**

Fields & Relationships		Details	
Description		Enable Reports	<input checked="" type="checkbox"/>
API Name	Drop_Off_Point_c	Track Activities	<input checked="" type="checkbox"/>
Buttons, Links, and Actions	Custom	Track Field History	<input checked="" type="checkbox"/>
Compact Layouts	Singular Label	Deployment Status	<a href="#">Deployed</a>
Field Sets	Drop-Off Point	Help Settings	<a href="#">Standard salesforce.com Help Window</a>
Object Limits	Plural Label		
Record Types	Drop-Off Points		
Related Lookup Filters			
Search Layouts			
List View Button Layout			
Restriction Rules			
Scoping Rules			

**SETUP** **Object Manager**

1 items, Sorted by Label

Search Setup  Schema Builder Create [▼](#)

Label	API Name	Type	Description	Last Modified	Deployed
Drop-Off Point	Drop_Off_Point_c	Custom Object		9/8/2025	<input checked="" type="checkbox"/>

<https://orgfarm-b9fabf6cc81-dev-ed.lightning.force.com/one/one.app#/setup/ObjectManager>

### c) Tasks Object

The screenshot shows the Salesforce Object Manager page. At the top, there are tabs for Setup, Home, and Object Manager. The main area displays a table of objects with columns for Label, API Name, Type, Description, and Last Modified. The objects listed include Account, Activity, Address, Agent Work, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Approval Submission, Approval Submission Detail, and Approval Work Item. The 'Type' column indicates most are Standard Objects, except for the last one which is a Custom Object.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Address	Address	Standard Object		
Agent Work	AgentWork	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment Category	AppointmentCategory	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Approval Submission	ApprovalSubmission	Standard Object		
Approval Submission Detail	ApprovalSubmissionDetail	Standard Object		
Approval Work Item	ApprovalWorkItem	Standard Object		

The screenshot shows the 'New Custom Object' setup page. At the top, there are tabs for Setup, Home, and Object Manager. The main area is titled 'New Custom Object' and contains a 'Custom Object Definition Edit' form. The 'Custom Object Information' section includes fields for Label (Task), Plural Label (Tasks), and a checkbox for 'Starts with vowel sound'. The 'Object Name' section shows 'Object Name' (Task) and 'Example: Account'. Below these are sections for 'Description' (a large text area), 'Context-Sensitive Help Setting' (radio buttons for standard help or Visualforce page), and 'Content Name' (a dropdown menu). At the bottom, there is a note about Record Name and a 'Save' button at the top right.

**SETUP** New Custom Object

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

Record Name: Task Name Example: Account Name

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

**Optional Features**

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

**Object Classification**

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

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

**Deployment Status**

- In Development
- Deployed

**Search Status**

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

Allow Search

**SETUP > OBJECT MANAGER**

## Task

Details	
Fields & Relationships	Description
Page Layouts	
Lightning Record Pages	API Name: Task_c
Buttons, Links, and Actions	Custom
Compact Layouts	<input checked="" type="checkbox"/> Singular Label: Task
Field Sets	<input checked="" type="checkbox"/> Plural Label: Tasks
Object Limits	Enable Reports: <input checked="" type="checkbox"/>
Record Types	Track Activities: <input checked="" type="checkbox"/>
Related Lookup Filters	Track Field History: <input checked="" type="checkbox"/>
Search Layouts:	Deployment Status: Deployed
List View Button Layout	Help Settings: Standard salesforce.com Help Window
Restriction Rules	
Scoping Rules	

**SETUP** Object Manager

2 Items. Sorted by Label

Search Setup: task

Schema Builder Create ▾

Label	API Name	Type	Description	Last Modified	Deployed
Task	Task_c	Custom Object		9/8/2025	<input checked="" type="checkbox"/>
Task	Task	Standard Object			

<https://orgfarm-b9fab6ce81-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01lgL0000024C87/view>

## d) Volunteer objects

The screenshot shows the Salesforce Object Manager page. At the top, there are tabs for Setup, Home, and Object Manager. The main area displays a table of objects with columns for Label, API Name, Type, Description, and Last Modified. The objects listed include Account, Activity, Address, Agent Work, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Approval Submission, Approval Submission Detail, and Approval Work Item. The Type column indicates most are Standard Object, except for Agent Work, Alternative Payment Method, and Approval Work Item which are Custom Object.

The screenshot shows the "New Custom Object" page under the Setup tab. The title is "New Custom Object". The page contains a "Custom Object Definition Edit" form with several sections:

- Custom Object Information:** Fields for Label (Volunteer), Plural Label (Volunteers), and a checkbox for Starts with vowel sound.
- Object Name:** Field for Object Name (Volunteer).
- Description:** A large text input field.
- Context-Sensitive Help Setting:** Radio buttons for Open the standard Salesforce.com Help & Training window (selected) and Open a window using a Visualforce page.
- Content Name:** A dropdown menu set to "None".
- Enter Record Name Label and Format:** A note explaining the Record Name field's purpose.

**SETUP** New Custom Object

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

Record Name: **Volunteer Name** Example: Account Name

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

**Optional Features**

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Charter Groups
- Enable Licensing

**Object Classification**

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

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

**Deployment Status**

- In Development
- Deployed

**Search Status**

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

Allow Search

**SETUP > OBJECT MANAGER**

## Volunteer

**Details**

Fields & Relationships	Description	<input checked="" type="checkbox"/> Enable Reports
Page Layouts	API Name Volunteer_c	<input checked="" type="checkbox"/> Track Activities
Lightning Record Pages	Custom	<input checked="" type="checkbox"/> Track Field History
Buttons, Links, and Actions	Singular Label Volunteer	<input checked="" type="checkbox"/> Deployment Status
Compact Layouts	Plural Label Volunteers	Deployed
Field Sets		Help Settings
Object Limits		Standard salesforce.com Help Window
Record Types		
Related Lookup Filters		
Search Layouts		
List View Button Layout		
Restriction Rules		
Scoping Rules		

**SETUP** Object Manager

1 items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Volunteer	Volunteer_c	Custom Object		9/8/2025	<input checked="" type="checkbox"/>

<https://orfarm-h9tab6o81-dev-ed.develop.lightning.force.com/o/one/one.aspx#/setup/ObjectManager/01lql0000024CEU/view>

## e) Execution Detail Object

The screenshot shows the Salesforce Object Manager page. At the top, there are tabs for Setup, Home, and Object Manager. The main area displays a table of objects with columns for Label, API Name, Type, Description, and Last Modified. The objects listed include Account, Activity, Address, Agent Work, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Approval Submission, Approval Submission Detail, and Approval Work Item. The 'Type' column indicates most are Standard Objects, except for the last one which is a Custom Object.

The screenshot shows the 'New Custom Object' page under the 'Custom Object Definition Edit' tab. It includes sections for 'Custom Object Information' (Label: Execution Detail, Plural Label: Execution Details, Example: Account, Starts with vowel sound: unchecked), 'Object Name' (Object Name: Execution\_Detail, Example: Account), 'Description' (a large text input field), 'Context-Sensitive Help Setting' (radio buttons for standard help or Visualforce page, standard help is selected), and 'Content Name' (a dropdown menu set to 'Name'). A note at the bottom explains the Record Name field.

**SETUP** New Custom Object

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

Record Name: **Execution Detail Name** Example: Account Name

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

**Optional Features**

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

**Object Classification**

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

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

**Deployment Status**

- In Development
- Deployed

**Search Status**

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

Allow Search

**SETUP > OBJECT MANAGER**

## Execution Detail

Details	
Fields & Relationships	Description
Page Layouts	
Lightning Record Pages	API Name: Execution_Detail__c
Buttons, Links, and Actions	Custom: <input checked="" type="checkbox"/>
Compact Layouts	Singular Label: Execution Detail
Field Sets	Plural Label: Execution Details
Object Limits	Enable Reports: <input checked="" type="checkbox"/>
Record Types	Track Activities: <input checked="" type="checkbox"/>
Related Lookup Filters	Track Field History: <input checked="" type="checkbox"/>
Search Layouts	Deployment Status: Deployed
List View Button Layout	Help Settings: Standard salesforce.com Help Window
Restriction Rules	
Scoping Rules	

**SETUP** Object Manager

1 Items. Sorted by Label

Search Setup  Schema Builder Create ▾

Label	API Name	Type	Description	Last Modified	Deployed
Execution_Detail	Execution_Detail__c	Custom Object		9/8/2025	<input checked="" type="checkbox"/>

<https://orgfarm-b9fab6ce81-dev-ed.develop.lightning.force.com/one/one.app//setup/ObjectManager/01lg0000024CHz2/view>

3) Create separate custom tabs for each object created by searching tabs in quick find box of Set up home page

The screenshot shows the Salesforce Setup Home page. At the top, there's a search bar with the placeholder "Search Setup". Below the search bar, there are navigation links: "Setup", "Home", and "Object Manager". On the left sidebar, under "User Interface", there's a section titled "Rename Tabs and Labels" with a "Tabs" tab selected. A message says "Didn't find what you're looking for? Try using Global Search." In the main content area, there's a "Data Cloud" card with a "Watch Video" and "Let's Go" button. Below the card, a section titled "Most Recently Used" lists three items: "SFDC\_DevConsole" (Debug Level), "AddPrimaryContactTest" (Apex Class), and "AddPrimaryContact" (Apex Class). The URL in the browser address bar is <https://orgfarm-b9fab6ce81-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home>.

The screenshot shows the Salesforce Tabs setup page. At the top, there's a search bar with the placeholder "Search Setup". Below the search bar, there are navigation links: "Setup", "Home", and "Object Manager". On the left sidebar, under "User Interface", there's a section titled "Rename Tabs and Labels" with a "Tabs" tab selected. A message says "Didn't find what you're looking for? Try using Global Search." In the main content area, there's a section titled "Custom Tabs" with a "Help for this Page" link. It says "You can create new custom tabs to extend Salesforce functionality or to build new application functionality." Below this, it describes four types of tabs: Custom Object tabs, Web tabs, Visualforce tabs, and Lightning Component tabs. Under "Custom Object Tabs", there's a table showing five entries: Equipment Maintenance Items (Factory style), Favorites (Bell style), Owners (Bank style), Properties (Bank style), and Students (Airplane style). Under "Web Tabs", it says "No Web Tabs have been defined". Under "Visualforce Tabs", it says "New | What Is This?". The URL in the browser address bar is <https://orgfarm-b9fab6ce81-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home>.

## a) Custom object tab for Venue

The screenshot shows the Salesforce Setup interface under the 'Tabs' section. A modal window titled 'New Custom Object Tab' is open, showing the configuration for a tab named 'Venue'. The 'Object' dropdown is set to 'Venue'. The 'Tab Style' dropdown is set to 'None'. The 'Execution Detail' dropdown is set to 'Task'. The 'Description' field contains the text 'Volunteer'.

The screenshot shows the same setup interface, but the 'Tab Style' dropdown is now open, displaying a grid of icons representing different tab styles. The 'Airplane[1]' style is selected. A tooltip indicates that this style is used on the 'Students' tab. The 'Tab Style Selector' dialog also lists other styles like 'Alarm clock', 'Apple', 'Balls', etc., each with a small preview icon.

**Setup** Home Object Manager ▾

Q tabs

User Interface

Rename Tabs and Labels

**Tabs**

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

## SETUP Tabs

### New Custom Object Tab

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

**New Custom Object Tab**

Select an existing custom object or [create a new custom object now](#).

Object: **Venue**

Tab Style: **Airplane**

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.  
Splash Page Custom Link: **None**

Enter a short description.

Description:

Next Cancel

**Setup** Home Object Manager ▾

Q tabs

User Interface

Rename Tabs and Labels

**Tabs**

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

## SETUP Tabs

### Step 3. Add to Custom Apps

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	Include Tab
Platform (standard_Platform)	<input type="checkbox"/>
Sales (standard_Sales)	<input type="checkbox"/>
Service (standard_Service)	<input type="checkbox"/>
Marketing CRM Classic (standard_Marketing)	<input type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>
Community (standard_Community)	<input type="checkbox"/>
Site.com (standard_Sites)	<input type="checkbox"/>
Salesforce Chatter (standard_Chatter)	<input type="checkbox"/>
Content (standard_Content)	<input type="checkbox"/>
Analytics Studio (standard_Insights)	<input type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input type="checkbox"/>

**Setup** Home Object Manager ▾

Q tabs

User Interface

Rename Tabs and Labels

**Tabs**

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

## SETUP Tabs

Sales Console (standard_LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard_LightningService)	<input type="checkbox"/>
Sales (standard_LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard_SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard_QueueManagement)	<input type="checkbox"/>
Data Manager (standard_DataManager)	<input type="checkbox"/>
Subscription Management (standard_RevenueCloudConsole)	<input type="checkbox"/>
Sales Cloud Mobile (standard_SalesCloudMobile)	<input type="checkbox"/>
Bolt Solutions (standard_LightningBolt)	<input type="checkbox"/>
Data Cloud (standard_Audience360)	<input type="checkbox"/>
Approvals (standard_Approvals)	<input type="checkbox"/>
My Service Journey (standard_MSJApp)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard_LightningScheduler)	<input type="checkbox"/>
Automation (standard_FlowsApp)	<input type="checkbox"/>

Append tab to users' existing personal customizations

Previous Save Cancel

**Custom Object Tabs**

Action	Label	Tab Style	Description
Edit   Del	Equipment Maintenance Items	Factory	
Edit   Del	Favorites	Bolt	
Edit   Del	Others	Bank	
Edit   Del	Properties	Bank	
Edit   Del	Students	Airplane	
Edit   Del	Vehicles	Car	
Edit   Del	Venues	Airplane	

**Web Tabs**

New | What Is This?

No Web Tabs have been defined.

## b) Custom object tab for Drop-Off Point

**New Custom Object Tab**

**Step 1. Enter the Details**

Choose the custom object for this new custom tab. Fill in other details.

**New Custom Object Tab**

Select an existing custom object or [create a new custom object now](#).

Object	Drop-Off Point	Required Information
Tab Style	-None-	
(Optional) Choose a Home Page Custom Splash Page Custom Link	Drop-Off Point	
Execution Detail	Open page the first time your users click on this tab.	
Task		
Volunteer		

Enter a short description.

Description

Next | Cancel

Setup Home Object Manager

Q tabs

User Interface

Rename Tabs and Labels

**Tabs**

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

## New Custom Object Tab

**Step 1. Enter the Details**

Choose the custom object for this new custom tab. Fill in other details.

**New Custom Object Tab**

Select an existing custom object or create a new custom object now.

Object: Drop-Off Point

Tab Style: Airplane

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: None

Enter a short description.

Description:

**Tab Style Selector - Google Chrome**

Tab Style Selector Create your own style

Icon	Name
Airplane[1]	Alarm clock
Banana[2]	Bell[1]
Books	Bottle
Building	Building Block
Can	Cart[1]
Cell phone	Chalkboard
Circle	Compass
CRT TV	Cup
Dice	Factory[1]
Form	Gears
Hammer	Hands
Heart	Helicopter[1]
Hot Air Balloon	Insect
Keys	Laptop
Plane	Apple
Plane	Big top
Plane	Box
Plane	Caduceus
Plane	Castle
Plane	Chess piece
Plane	Computer
Plane	Desk
Plane	Diamond
Plane	Fan
Plane	Flag
Plane	Globe
Plane	Guitar
Plane	Hand saw
Plane	Headset
Plane	Hexagon
Plane	Highway sign
Plane	IP Phone
Plane	Jewel
Plane	Leaf
Plane	Lightning

Next Cancel

Setup Home Object Manager

Q tabs

User Interface

Rename Tabs and Labels

**Tabs**

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

## New Custom Object Tab

**Step 1. Enter the Details**

Choose the custom object for this new custom tab. Fill in other details.

**New Custom Object Tab**

Select an existing custom object or create a new custom object now.

Object: Drop-Off Point

Tab Style: Airplane

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: None

Enter a short description.

Description:

Help for this Page

Step 1 of 3

Required information

Next Cancel

Setup Home Object Manager

Q tabs

User Interface

Rename Tabs and Labels

**Tabs**

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

## Step 3. Add to Custom Apps

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

**Custom App**

Custom App	Include Tab
Platform (standard_Platform)	<input type="checkbox"/>
Sales (standard_Sales)	<input type="checkbox"/>
Service (standard_Service)	<input type="checkbox"/>
Marketing CRM Classic (standard_Marketing)	<input type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>
Community (standard_Community)	<input type="checkbox"/>
Site.com (standard_Sites)	<input type="checkbox"/>
Salesforce Chatter (standard_Chatter)	<input type="checkbox"/>
Content (standard_Content)	<input type="checkbox"/>
Analytics Studio (standard_Insights)	<input type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input type="checkbox"/>

Step 3 of 3

Search Setup

Setup Home Object Manager

User Interface

Rename Tabs and Labels

**Tabs**

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

Sales Console (standard\_LightningSalesConsole)

Service Console (standard\_LightningService)

Sales (standard\_LightningSales)

Lightning Usage App (standard\_LightningInstrumentation)

Digital Experiences (standard\_SalesforceCMS)

Queue Management (standard\_QueueManagement)

Data Manager (standard\_DataManager)

Subscription Management (standard\_RevenueCloudConsole)

Sales Cloud Mobile (standard\_SalesCloudMobile)

Bolt Solutions (standard\_LightningBolt)

Data Cloud (standard\_Audience360)

Approvals (standard\_Approvals)

My Service Journey (standard\_MSJApp)

Salesforce Scheduler Setup (standard\_LightningScheduler)

Automation (standard\_FlowsApp)

Append tab to users' existing personal customizations

Previous Save Cancel

Search Setup

Setup Home Object Manager

User Interface

Rename Tabs and Labels

**Tabs**

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

### Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
Edit   Del	Drop-Off Points	Airplane	
Edit   Del	Equipment Maintenance Items	Factory	
Edit   Del	Favorites	Bell	
Edit   Del	Offers	Bank	
Edit   Del	Properties	Blank	
Edit   Del	Students	Airplane	
Edit   Del	Vehicles	Car	
Edit   Del	Venues	Airplane	

**Web Tabs**

New What Is This?

No Web Tabs have been defined

### c) Custom object tab for Task

Search Setup

Setup Home Object Manager

User Interface

Rename Tabs and Labels

**Tabs**

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

### New Custom Object Tab

Step 1: Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab

Help for this Page

Step 1 of 3

Required Information

Select an existing custom object or **Create a new custom object first**.

Object: **None**

Tab Style: **None**

Execution Detail: **Task**

(Optional) Choose a Home Page Custom Splash Page System Link

Enter a short description.

Description:

Next Cancel

Setup Home Object Manager

tabs

User Interface Rename Tabs and Labels Tabs

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

## New Custom Object Tab

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

**New Custom Object Tab**

Select an existing custom object or [create a new custom object now](#).

Object: Task Tab Style:

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab. Splash Page Custom Link: [None](#)

Enter a short description. Description:

Tab Style Selector - Google Chrome

Tab Style Selector Create your own style

Hide styles which are used on other tabs

Airplane(3)	Alarm clock	Apple	Balls
Bank(2)	Bell(1)	Big top	Boat
Books	Bottle	Box	Bridge
Building	Building Block	Caduceus	Camera
Can	Car(1)	Castle	CD/DVD
Cell phone	Chalkboard	Chess piece	Chip
Circle	Compass	Computer	Credit card
CRT TV	Cup	Desk	Diamond
Dice	Factory(1)	Fan	Flag
Form	Gears	Globe	Guitar
Hammer	Hands	Handsaw	Headset
Heart	Helicopter(1)	Hexagon	Highway Sign
Hot Air Balloon	Insect	IP Phone	Jewel
Keys	Laptop	Leaf	Lightning

Next Cancel

Setup Home Object Manager

tabs

User Interface Rename Tabs and Labels Tabs

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

## New Custom Object Tab

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

**New Custom Object Tab**

Select an existing custom object or [create a new custom object now](#).

Object: Task Tab Style: Alarm clock

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab. Splash Page Custom Link: [None](#)

Enter a short description. Description:

Help for this Page Step 1 of 3

Required Information

Next Cancel

Setup Home Object Manager

tabs

User Interface Rename Tabs and Labels Tabs

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

## Step 3. Add to Custom Apps

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

**Custom App**

Platform (standard\_Platform)

Sales (standard\_Sales)

Service (standard\_Service)

Marketing CRM Classic (standard\_Marketing)

Sample Console (standard\_ServiceConsole)

High Volume Customer Portal User

Authenticated Website User

App Launcher (standard\_AppLauncher)

Community (standard\_Community)

Sites.com (standard\_Sites)

Salesforce Chatter (standard\_Chatter)

Content (standard\_Content)

Analytics Studio (standard\_Insights)

Sales Console (standard\_LightningSalesConsole)

Include Tab

Step 3 of 3

Sales Console (standard\_\_LightningSalesConsole)

Service Console (standard\_\_LightningService)

Sales (standard\_\_LightningSales)

Lightning Usage App (standard\_\_LightningInstrumentation)

Digital Experiences (standard\_\_SalesforceCMS)

Queue Management (standard\_\_QueueManagement)

Data Manager (standard\_\_DataManager)

Subscription Management (standard\_\_RevenueCloudConsole)

Sales Cloud Mobile (standard\_\_SalesCloudMobile)

Bolt Solutions (standard\_\_LightningBolt)

Data Cloud (standard\_\_Audience360)

Approvals (standard\_\_Approvals)

My Service Journey (standard\_\_MSJApp)

Salesforce Scheduler Setup (standard\_\_LightningScheduler)

Automation (standard\_\_FlowsApp)

Append tab to users' existing personal customizations

Previous Save Cancel

Action	Label	Tab Style	Description
Edit   Del	Drop-Off Points	Airplane	
Edit   Del	Equipment Maintenance Items	Factory	
Edit   Del	Favorites	Bell	
Edit   Del	Offers	Bank	
Edit   Del	Properties	Bank	
Edit   Del	Students	Airplane	
Edit   Del	Tasks	Alarm clock	
Edit   Del	Vehicles	Car	
Edit   Del	Venues	Airplane	

New What Is This?

Help for this Page

#### d) Custom object tab for Volunteer

Step 1: Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab

Select an existing custom object or create a new custom object now:

Object: Volunteer

Tab style: None

Execution Detail: Volunteer

(Optional) Choose a Home Page Customization Page or a Page Layout to display this tab on the first time your users click on this tab.

Enter a short description:

Next Step

Setup Home Object Manager

## Tabs

New Custom Object Tab

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

**New Custom Object Tab**

Select an existing custom object or [create a new custom object now](#).

Object: Volunteer

Tab Style:

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: None

Enter a short description.

Description:

Tab Style Selector - Google Chrome

Hide styles which are used by other tabs.

Create your own style

Airplane[3]	Alarm clock[1]	Apple	Balls
Bank[2]	Bell[1]	Big top	Boat
Books	Bottle	Box	Bridge
Building	Building Block	Caduceus	Camera
Car	Car[1]	Castle	CD/DVD
Cell phone	Chalkboard	Chess piece	Chip
Circle	Compass	Computer	Credit card
CRT TV	Cup	Desk	Diamond
Dice	Factory[1]	Fan	Flag
Form	Gears	Globe	Guitar
Hammer	Hands	Handsaw	Headset
Heart	Helicopter[1]	Hexagon	Highway Sign
Hot Air Balloon	Insect	IP Phone	Jewel
Keys	Laptop	Leaf	Lightning

Next Cancel

Setup Home Object Manager

## Tabs

New Custom Object Tab

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details

**New Custom Object Tab**

Select an existing custom object or [create a new custom object now](#).

Object: Volunteer

Tab Style:

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: None

Enter a short description.

Description:

Help for this Page

Step 1 of 3

Required Information

Next Cancel

Setup Home Object Manager

## Tabs

Step 3. Add to Custom Apps

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App

Platform (standard_Platform)	<input type="checkbox"/> Include Tab
Sales (standard_Sales)	<input type="checkbox"/>
Service (standard_Service)	<input type="checkbox"/>
Marketing CRM Classic (standard_Marketing)	<input type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>
Community (standard_Community)	<input type="checkbox"/>
Sites.com (standard_Sites)	<input type="checkbox"/>
Salesforce Chatter (standard_Chatter)	<input type="checkbox"/>
Content (standard_Content)	<input type="checkbox"/>
Analytics Studio (standard_Insights)	<input type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input type="checkbox"/>

Step 3 of 3

Sales Console (standard\_\_LightningSalesConsole)

Service Console (standard\_\_LightningService)

Sales (standard\_\_LightningSales)

Lightning Usage App (standard\_\_LightningInstrumentation)

Digital Experiences (standard\_\_SalesforceCMS)

Queue Management (standard\_\_QueueManagement)

Data Manager (standard\_\_DataManager)

Subscription Management (standard\_\_RevenueCloudConsole)

Sales Cloud Mobile (standard\_\_SalesCloudMobile)

Bolt Solutions (standard\_\_LightningBolt)

Data Cloud (standard\_\_Audience360)

Approvals (standard\_\_Approvals)

My Service Journey (standard\_\_MSJApp)

Salesforce Scheduler Setup (standard\_\_LightningScheduler)

Automation (standard\_\_FlowsApp)

Append tab to users' existing personal customizations

Previous Save Cancel

Action	Label	Tab Style	Description
Edit   Del	Drop-Off Points	Airplane	
Edit   Del	Equipment Maintenance Items	Factory	
Edit   Del	Favorites	Bell	
Edit   Del	Offers	Blank	
Edit   Del	Properties	Blank	
Edit   Del	Students	Airplane	
Edit   Del	Tasks	Alarm clock	
Edit   Del	Vehicles	Car	
Edit   Del	Venues	Airplane	
Edit   Del	Volunteers	Alarm clock	

## e) Custom object tab for Execution Detail

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab

Step 1 of 5

Help for this Page

Select an existing custom object or create a new custom object now.

Object: Execution Detail

Tab Style: None

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your user clicks on this tab.

Splash Page Custom Link: None

Enter a short description

Description:

Next Step Cancel

Setup Home Object Manager

## Tabs

New Custom Object Tab

**Step 1. Enter the Details**

Choose the custom object for this new custom tab. Fill in other details.

**New Custom Object Tab**

Select an existing custom object or [create a new custom object now](#).

Object: Execution Detail

Tab Style:  

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: None

Enter a short description.

Description:

Tab Style Selector - Google Chrome

Tab Style Selector [Create your own style](#)

Hide styles which are used on other tabs

Airplane[3]	Alarm clock[2]	Apple	Balls
Bank[2]	Bell[1]	Big top	Boat
Books	Bottle	Box	Bridge
Building	Building Block	Caduceus	Camera
Can	Car[1]	Castle	CD/DVD
Cell phone	Chalkboard	Chess piece	Chip
Circle	Compass	Computer	Credit card
CRT TV	Cup	Desk	Diamond
Dice	Factory[1]	Fan	Flag
Form	Gears	Globe	Guitar
Hammer	Hands	Handsaw	Headset
Heart	Helicopter[1]	Hexagon	Highway Sign
Hot Air Balloon	Insect	IP Phone	Jewel
Keys	Laptop	Leaf	Lightning
Locked	Mail	Map	Measuring Tape
Microphone	Moon	Motorcycle	Musical Note
PDA	Pencil	People	Phone

Setup Home Object Manager

## Tabs

New Custom Object Tab

**Step 1. Enter the Details**

Choose the custom object for this new custom tab. Fill in other details.

**New Custom Object Tab**

Select an existing custom object or [create a new custom object now](#).

Object: Execution Detail

Tab Style:  

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: None

Enter a short description.

Description:

Help for this Page 

Step 1 of 3

Required information

Next Cancel 

Setup Home Object Manager

## Tabs

**Step 3. Add to Custom Apps**

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	<input type="checkbox"/> Include Tab
Platform (standard_Platform)	<input type="checkbox"/>
Sales (standard_Sales)	<input type="checkbox"/>
Service (standard_Service)	<input type="checkbox"/>
Marketing CRM Classic (standard_Marketing)	<input type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>
Community (standard_Community)	<input type="checkbox"/>
Site.com (standard_Sites)	<input type="checkbox"/>
Salesforce Chatter (standard_Chatter)	<input type="checkbox"/>
Content (standard_Content)	<input type="checkbox"/>
Analytics Studio (standard_Insights)	<input type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input type="checkbox"/>

Step 3 of 3

Sales Console (standard\_\_LightningSalesConsole)  
Service Console (standard\_\_LightningService)  
Sales (standard\_\_LightningSales)  
Lightning Usage App (standard\_\_LightningInstrumentation)  
Digital Experiences (standard\_\_SalesforceCMS)  
Queue Management (standard\_\_QueueManagement)  
Data Manager (standard\_\_DataManager)  
Subscription Management (standard\_\_RevenueCloudConsole)  
Sales Cloud Mobile (standard\_\_SalesCloudMobile)  
Bolt Solutions (standard\_\_LightningBolt)  
Data Cloud (standard\_\_Audience360)  
Approvals (standard\_\_Approvals)  
My Service Journey (standard\_\_MSJApp)  
Salesforce Scheduler Setup (standard\_\_LightningScheduler)  
Automation (standard\_\_FlowsApp)

Append tab to users' existing personal customizations

Previous Save Cancel

Action	Label	Tab Style	Description
Edit   Del	Drop-off Points	Airplane	
Edit   Del	Equipment Maintenance Items	Factory	
Edit   Del	Execution Details	Alarm clock	
Edit   Del	Favorites	Bell	
Edit   Del	Offices	Bank	
Edit   Del	Properties	Airplane	
Edit   Del	Students	Alarm clock	
Edit   Del	Tasks	Car	
Edit   Del	Vehicles	Airplane	
Edit   Del	Various	Alarm clock	
Edit   Del	Volunteers	Alarm clock	

#### 4) Creation of new Lightning app-Food connect

Search Setup

Create

App Manager

External Client App Manager

External Client App Manager

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

## New Lightning App

### App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

<b>App Details</b>	<b>App Branding</b>
*App Name <input type="text" value="FoodConnect"/> *Developer Name <input type="text" value="FoodConnect"/> Description <input type="text" value="Enter a description..."/>	Image <input type="file"/> Primary Color Hex Value <input type="color" value="#0070D2"/>
<input type="checkbox"/> Use the app's image and color instead of the org's	

Next

12 How We Roll Maintenance How\_We\_Roll\_Maintenance 8/3/2025, 12:27 PM Lightning ✓  
 13 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 6/20/2025, 4:04 PM Lightning ✓  
 14 Marketing CRM Classic Marketing Track sales and marketing efforts with CRM objects. 6/20/2025, 4:04 PM Classic ✓

## New Lightning App

### App Options

Navigation and Form Factor

- \*Navigation Style
  Standard navigation
  Console navigation
- \*Supported Form Factors
  Desktop and phone
  Desktop
  Phone

Setup and Personalization

- Setup Experience
  Setup (full set of Setup options)
  Service Setup
  Data Cloud Setup
- App Personalization Settings
  Disable end user personalization of nav items in this app
  Disable temporary tabs for items outside of this app
  Use Omni-Channel sidebar

Back Next

12 How We Roll Maintenance How\_We\_Roll\_Maintenance 8/3/2025, 12:27 PM Lightning ✓  
 13 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 6/20/2025, 4:04 PM Lightning ✓  
 14 Marketing CRM Classic Marketing Track sales and marketing efforts with CRM objects. 6/20/2025, 4:04 PM Classic ✓

## New Lightning App

### Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.

Add Utility Item Utility Bar Alignment: Default

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.

Back Next

12 How We Roll Maintenance How\_We\_Roll\_Maintenance 8/3/2025, 12:27 PM Lightning ✓  
 13 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 6/20/2025, 4:04 PM Lightning ✓  
 14 Marketing CRM Classic Marketing Track sales and marketing efforts with CRM objects. 6/20/2025, 4:04 PM Classic ✓

**New Lightning App**

Type to filter list...

Accounts:  Activation Targets:  Activations:  All Sites:  Alternative Payment Methods:  Analytics:  App Launcher:  Appointment Categories:  Appointment Invitations:  Approval Requests:

Home:  Venues:  Tasks:  Drop-Off Points:  Execution Details:  Volunteers:  Reports:  Dashboards:

Back Next

12. How We Roll Maintenance How\_We\_Roll\_Maintenance 8/3/2025, 12:27 PM Lightning ✓  
 13. Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 6/20/2025, 4:04 PM Lightning ✓  
 14. Marketing CRM Classic Marketing Track sales and marketing efforts with CRM objects. 6/20/2025, 4:04 PM Classic ✓

**New Lightning App**

Type to filter list...  System Administrator:

Salesforce API Only System Integrations:

Back Save & Finish

12. How We Roll Maintenance How\_We\_Roll\_Maintenance 8/3/2025, 12:27 PM Lightning ✓  
 13. Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 6/20/2025, 4:04 PM Lightning ✓  
 14. Marketing CRM Classic Marketing Track sales and marketing efforts with CRM objects. 6/20/2025, 4:04 PM Classic ✓

**Lightning Experience App Manager**

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

App Name ↑	Developer Name	Description	Last Modified D...	App Ty...	Visibl...
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	6/20/2025, 4:04 PM	Classic	✓
App Launcher	AppLauncher	App Launcher tabs	6/20/2025, 4:04 PM	Classic	✓
Approvals	Approvals	Manage approvals and approval flows	6/20/2025, 4:04 PM	Lightning	✓
Automation	FlowsApp	Automate business processes and repetitive tasks.	6/20/2025, 4:12 PM	Lightning	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	6/20/2025, 4:04 PM	Lightning	✓
Community	Community	Salesforce CRM Communities	6/20/2025, 4:04 PM	Classic	✓
Content	Content	Salesforce CRM Content	6/20/2025, 4:04 PM	Classic	✓
Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	6/20/2025, 4:04 PM	Lightning	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	6/20/2025, 4:04 PM	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	6/20/2025, 4:04 PM	Lightning	✓
FoodConnect	FoodConnect		9/9/2025, 10:47 AM	Lightning	✓
How We Roll Maintenance	FoodConnect	Intenance	8/3/2025, 12:27 PM	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	6/20/2025, 4:04 PM	Lightning	✓
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	6/20/2025, 4:04 PM	Classic	✓

5) Creation of essential field under each Objects created already

a) Creation of Relationship fields in objects

The screenshot shows the Salesforce Object Manager interface. At the top, there is a search bar with the query "volunteer". Below the search bar, the title "Object Manager" is displayed, followed by a subtitle "1 item, Sorted by Label". A table lists the object details:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Volunteer	Volunteer__c	Custom Object		9/8/2025	✓

The screenshot shows the Salesforce Object Details page for the "Volunteer" object. The left sidebar contains a navigation menu with options like "Details", "Fields & Relationships", "Page Layouts", etc. The main content area is titled "Details" and shows the following configuration:

Description	Enable Reports
API Name Volunteer__c	✓
Custom	✓
Singular Label Volunteer	✓
Plural Label Volunteers	✓
Deployment Status Deployed	✓
Help Settings Standard Salesforce.com Help Window	✓

The URL at the bottom of the page is: <https://orgfarm-b9fab6ce81-dev-ed.lightning.force.com/one/one.app#/setup/ObjectManager/01l0000024CEJFieldsAndRelationships/view>

Setup Home Object Manager

SETUP > OBJECT MANAGER Volunteer

### New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

**Data Type**

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
  - The relationship field is required on all detail records.
  - The ownership and sharing of a detail record are determined by the master record.
  - When a user deletes the master record, all detail records are deleted.
  - You can create rollup summary fields on the master record to summarize the detail records.
 The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Help for this Page

Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER Volunteer

### New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To Drop-Off Point

Help for this Page

Previous Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER Volunteer

### New Relationship

Step 3. Enter the label and name for the lookup field

Field Label Drop-Off Point

Field Name Drop\_Off\_Point

Description

Help Text

Child Relationship Name Volunteers

Sharing Setting

- Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
- Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting  Child records can be reparented to other parent records after they are created

Auto add to custom report type  Add this field to existing custom report types that contain this entry

Help for this Page

Previous Next Cancel

SETUP > OBJECT MANAGER  
**Volunteer**

**Fields & Relationships**

Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

**New Relationship**

**Step 4. Establish field-level security for reference field**

Field Label: Drop-Off Point  
Data Type: Master-Detail  
Field Name: Drop\_Off\_Point  
Description:

These are the field-level settings for a Master-Detail relationship. They cannot be changed.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Step 4 of 6**

Previous Next Cancel Next

SETUP > OBJECT MANAGER  
**Volunteer**

**Fields & Relationships**

Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

**New Relationship**

**Step 5. Add reference field to Page Layouts**

Field Label: Drop-Off Point  
Data Type: Master-Detail  
Field Name: Drop\_Off\_Point  
Description:

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Field Page Layout Name  
 Volunteer Layout

**Step 5 of 6**

Previous Next Cancel Next

SETUP > OBJECT MANAGER  
**Volunteer**

**Fields & Relationships**

Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

**New Relationship**

**Step 6. Add custom related lists**

Field Label: Drop-Off Point  
Data Type: Master-Detail  
Field Name: Drop\_Off\_Point  
Description:

Specify the title that the related list will have in all of the layouts associated with the parent.  
Related List Label:

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List Page Layout Name  
 Drop-Off Point Layout

Append related list to users' existing personal customizations

**Step 6 of 6**

Previous Save & New Save Cancel Previous Save & New Save Cancel

Setup Home Object Manager

Object Manager

1 Items, Sorted by Label

execution detail Schema Builder Create

Label	API Name	Type	Description	Last Modified	Deployed
Execution Detail	Execution_Detail__c	Custom Object		9/8/2025	✓

Setup Home Object Manager

SETUP > OBJECT MANAGER Execution Detail

Details Fields & Relationships

Description

API Name: Execution\_Detail\_\_c  
Custom: ✓  
Singular Label: Execution Detail  
Plural Label: Execution Details

Enable Reports: ✓  
Track Activities: ✓  
Track Field History: ✓  
Deployment Status: Deployed  
Help Settings: Standard salesforce.com Help Window

Edit Delete

<https://orgfarm-b9fb6ce81-dev-ed.lightning.force.com/one/one.app#/setup/ObjectManager/01gj0000024CHz/FieldsAndRelationships/view>

Setup Home Object Manager

SETUP > OBJECT MANAGER Execution Detail

Details Fields & Relationships

New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Next Cancel

**Session Hijacking Event Store**

Shift  
Shipment  
Shipment Item  
Shipping Carrier  
Shipping Carrier Method  
Solution  
Store  
Student  
Task  
Threat Detection Feedback  
User Presence  
Vehicle  
Venue  
Voice Call

**New Relationship**

**Step 2. Choose the related object**

Select the other object to which this object has a relationship.

Related To: **Volunteer**

Help for this Page

Step 2 of 6

Previous Next Cancel

**Execution Detail**

Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

**New Relationship**

**Step 6. Add custom related lists**

Field Label: Volunteer  
Data Type: Master-Detail  
Field Name: Volunteer  
Description:

Specify the title that the related list will have in all of the layouts associated with the parent.  
Related List Label: **Execution Details**

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List Page Layout Name  
 Volunteer Layout  
 Append related list to users' existing personal customizations

Help for this Page

Step 6 of 6

Previous Save & New Save Cancel

**Execution Detail**

Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

**New Custom Field**

**Step 1. Choose the field type**

Specify the type of information that the custom field will contain.

**Data Type**

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Help for this Page

Step 1

Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER Execution Detail

Execution Detail New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Help for this Page

Next Cancel Step 1

Setup Home Object Manager

SETUP > OBJECT MANAGER Execution Detail

Execution Detail New Relationship

Step 2. Choose the related object

Select the other object to which this object has a relationship.

Seller  
Service Appointment  
Service Appointment Attendee  
Service Contract  
Service Resource  
Service Territory  
Session Hijacking Event Store  
Shift  
Shipment  
Shipment Item  
Shipping Carrier  
Shipping Carrier Method  
Solution  
Store  
Student  
Task  
Related To Task

Help for this Page

Previous Next Cancel Step 2 of 6

Setup Home Object Manager

## Execution Detail

Details Copy Improve × ship

Help for this Page

**Fields & Relationships**

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

Step 6. Add custom related lists Step 6 of 6

Field Label Task  
Data Type Master-Detail  
Field Name Task  
Description

Specify the title that the related list will have in all of the layouts associated with the parent.  
Related List Label Execution Details

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List Page Layout Name  
 Task Layout  
 Append related list to users' existing personal customizations

Previous Save & New Save Cancel

Setup Home Object Manager

## Object Manager

1 items, Sorted by Label

drop Schema Builder Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Drop-Off Point	Drop_Off_Point_c	Custom Object		9/8/2025	✓

Setup Home Object Manager

## Drop-Off Point

Details Fields & Relationships

4 items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking Custom Field INDEXED

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Drop-Off Point Name	Name	Text(80)	✓	
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)	✓	

Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules

Setup Home Object Manager

## Drop-Off Point

### New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

**Data Type:**

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
  - The relationship field is required on all detail records.
  - The ownership and sharing of a detail record are determined by the master record.
  - When a user deletes the master record, all detail records are deleted.
  - You can create rollup summary fields on the master record to summarize the detail records.
- Master-Detail Relationship The relationship Copilot users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Help for this Page

Next Cancel

Setup Home Object Manager

## Drop-Off Point

### New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

**Related To:** **Venue**

Help for this Page

Previous Next Cancel

Setup Home Object Manager

## Drop-Off Point

### Field Label: Venue

Field Name: Venue

Description:

Help Text:

Child Relationship Name: Drop\_Off\_Points

Required:  Always require a value in this field in order to save a record.

What to do if the lookup record is deleted?

- Clear the value of this field. You can't choose this option if you make this field required.
- Don't allow deletion of the lookup record that's part of a lookup relationship.

Auto add to custom report type:  Add this field to existing custom report types that contain this entity.

Lookup Filter

Optional: create a filter to limit the records available to users in the lookup field. [Tell me more](#)

Show Filter Settings

Previous Next Cancel

Setup > Object Manager > Drop-Off Point

### New Relationship

Step 6 of 6

Field Label: Venue  
 Data Type: Lookup  
 Field Name: Venue  
 Description:

Specify the title that the related list will have in all of the layouts associated with the parent.  
 Related List Label: Drop-Off Points

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

Add Related List: Page Layout Name  
 Venue Layout

Append related list to users' existing personal customizations

Save & New | Save | Cancel

Setup > Object Manager

Object Manager

2 items, Sorted by Label

Label	API Name	Type	Description	Last Modified	Deployed
Task	Task__c	Custom Object		9/8/2025	✓
Task	Task	Standard Object			

Setup > Object Manager > Task

### Fields & Relationships

4 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Task Name	Name	Text(80)		✓

SETUP > OBJECT MANAGER

## Task

**Fields & Relationships**

- Details
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

**New Custom Field**

**Step 1. Choose the field type**

Specify the type of information that the custom field will contain.

**Data Type**

None Selected      Select one of the data types below.

Auto Number      A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula      A read-only field that derives its value from a formula expression you define. This formula field is updated when any of the source fields change.

Roll-Up Summary      A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship      Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
 

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create roll-up summary fields on the master record to summarize the detail records.

Master-Detail Relationship      Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where
 

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create roll-up summary fields on the master record to summarize the detail records.

Help for this Page

Next | Cancel

SETUP > OBJECT MANAGER

## Task

**Fields & Relationships**

- Details
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

**New Relationship**

**Step 2. Choose the related object**

Select the other object to which this object is related.

Related To: **Venue**

Help for this Page

Previous | Next | Cancel

SETUP > OBJECT MANAGER

## Task

**Fields & Relationships**

- Details
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

**New Relationship**

**Step 3. Enter the label and name for the lookup field**

Help for this Page

Field Label: **Venue**

Field Name: **Venue**

Description:

Help Text:

Child Relationship Name: **Tasks**

Required:  Always require a value in this field in order to save a record  
 Clear the value of this field. You can't choose this option if you make this field required.  
 Don't allow deletion of the lookup record that's part of a lookup relationship.

What to do if the lookup record is deleted?

Auto add to custom report type:  Add the field to existing custom report types that contain this entity

Help for this Page

Previous | Next | Cancel

Setup > Object Manager > Task

**Task**

Details Copy Improve : .ship Help for this Page

**Fields & Relationships**

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

**Step 6. Add custom related lists** Step 6 of 6

Field Label: Venue  
Data Type: Lookup  
Field Name: Venue  
Description:

Specify the title that the related list will have in all of the layouts associated with the parent.  
Related List Label: Tasks

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Related List / Page Layout Name:  Venue Layout  
 Append related list to users' existing personal customizations

Previous Save & New Save Cancel

Setup > Object Manager > Task

**Task**

Details Search Setup Help for this Page

**Fields & Relationships**

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

**New Custom Field**

**Step 1. Choose the field type** Step 1

Specify the type of information that the custom field will contain.

**Data Type**

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
  - The relationship field is required on all detail records.
  - The ownership and sharing of a detail record are determined by the master record.
  - When a user deletes the master record, all detail records are deleted.
  - You can create rollup summary fields on the master record to summarize the detail records.
- Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
  - The relationship field is required on all detail records.
  - The ownership and sharing of a detail record are determined by the master record.
  - When a user deletes the master record, all detail records are deleted.
  - You can create rollup summary fields on the master record to summarize the detail records.

Next Cancel

Setup > Object Manager > Task

**Task**

Details Search Setup Help for this Page

**Fields & Relationships**

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

**New Relationship**

**Step 2. Choose the related object** Step 2

Select the other object to which this object is related.

Related To: Drop-Off Point

Drop-Off Point

Contract Point Phone  
Contract Point Type Consent  
Content Folder  
Contract  
Contract Line Item  
Conversation  
Credential Stuffing Event Store  
Credit Memo  
Credit Memo Invoice Application  
Credit Memo Line  
Customer  
D&B Company  
Data Use Legal Basis  
Data Use Purpose  
Delivery Estimation Setup

Previous Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER Task

New Relationship

Step 3. Enter the label and name for the lookup field

Field Label: Drop-Off Point

Field Name: Drop\_Off\_Point

Description:

Help Text:

Child Relationship Name: Tasks

Required:  Always require a value in this field in order to save a record.

What to do if the lookup record is deleted?:  Clear the value of this field. You can't choose this option if you make this field required.  
 Don't allow deletion of the lookup record that's part of a lookup relationship.

Auto add to custom report type:  Add this field to existing custom report types that contain this entity.

Previous Next Cancel Next

Help for this Page

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules

Setup Home Object Manager

SETUP > OBJECT MANAGER Task

New Relationship

Step 6. Add custom related lists

Field Label: Drop-Off Point  
Data Type: Lookup  
Field Name: Drop\_Off\_Point  
Description:

Specify the title that the related list will have in all of the layouts associated with the parent.  
Related List Label: Tasks

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.  
To change the location of this field on the page, you will need to customize the page layout.

Add Related List: Page Layout Name  
 Drop-Off Point Layout  
 Append related list to users' existing personal customizations.

Previous Save & New Save Cancel

Help for this Page

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules

b) Creation of fields for the Venue object

Setup Home Object Manager

## Object Manager

1 items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Venue	Venue_c	Custom Object		9/8/2025	✓

Setup Home Object Manager

### Venue

SETUP > OBJECT MANAGER

Fields & Relationships		Fields & Relationships				
		FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)			
Lightning Record Pages	Last Modified By	LastModifiedById	Lookup(User)			
Buttons, Links, and Actions	Owner	OwnerId	Lookup(User,Group)		✓	
Compact Layouts	Venue Name	Name	Text(80)		✓	
Field Sets						
Object Limits						
Record Types						
Related Lookup Filters						
Search Layouts						
List View Button Layout						
Restriction Rules						
Scoping Rules						

Setup Home Object Manager

### Venue

SETUP > OBJECT MANAGER

Fields & Relationships		Fields & Relationships				
		FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)			
Lightning Record Pages	Last Modified By	LastModifiedById	Lookup(User)			
Buttons, Links, and Actions	Owner	OwnerId	Lookup(User,Group)		✓	
Compact Layouts	Venue Name	Name	Text(80)		✓	
Field Sets						
Object Limits						
Record Types						
Related Lookup Filters						
Search Layouts						
List View Button Layout						
Restriction Rules						
Scoping Rules						

**Formula**: A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

**Roll-Up Summary**: A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

**Lookup Relationship**: Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

**Master-Detail Relationship**: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

**External Lookup Relationship**: The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

**Checkbox**: Allows users to select a True (checked) or False (unchecked) value.

**Currency**: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

**Date**: Allows users to enter a date or pick a date from a popup calendar.

**DateTime**: Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

**Email**: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

**Geolocation**: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

**Number**: Allows users to enter any number. Leading zeros are removed.

**Percent**: Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.

Setup Home Object Manager

SETUP > OBJECT MANAGER: Venue

### New Custom Field

Step 2. Enter the details

Field Label: Contact Email

Field Name: Contact\_Email

Description:

Help Text:

Required:  Always require a value in this field in order to save a record

Unique:  Do not allow duplicate values

External ID:  Set this field as the unique record identifier from an external system

Auto add to custom report type:  Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Use formula syntax. Enclose text and picklist value API names in double quotes ("the\_text"), include numbers without dashes (-26), show percentages as decimals (.10), and express date calculations in

Step 2 of 4 Previous Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER: Venue

### New Custom Field

Step 3. Establish Field-level security

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Step 3 of 4 Previous Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Venue

**New Custom Field**

Step 4 of 4

Field Label: Contact Email  
Data Type: Email  
Field Name: Contact\_Email  
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

Add Field Page Layout Name  
 Venue Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Venue

**Fields & Relationships**

- Roll-Up Summary: A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship: Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
  - The relationship field is required on all detail records.
  - The ownership and sharing of a detail record are determined by the master record.
  - When a user deletes the master record, all detail records are deleted.
  - You can create rollup summary fields on the master record to summarize the detail records.
- External Lookup Relationship: The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
- Checkbox: Allows users to select a True (checked) or False (unchecked) value.
- Currency: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date: Allows users to enter a date or pick a date from a popup calendar.
- DateTime: Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the DateTime field.
- Email: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Geolocation: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number: Allows users to enter any number. Leading zeros are removed.
- Percent: Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
- Phone: Allows users to enter any phone number. Automatically formats it as a phone number.
- Text: Allows users to select a value from a list you define.

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Venue

**New Custom Field**

Step 2 of 4

Field Label: Contact Phone  
Field Name: Contact\_Phone  
Description:  
Help Text:  
Required:  Always require a value in this field in order to save a record  
Auto add to custom report type:  Add this field to existing custom report types that contain this entity  
Default Value: Show Formula Editor  
Use formula syntax. Enclose list and picklist value API names in double quotes ("list\_value"). Include numbers without quotes (.25), show percentages as decimals (.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \${CustomMetadataType\_\_mdt.RecordAPIName.FieldName}.

Previous Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER: Venue

**New Custom Field**

Step 4 of 4

Field Label: Contact Phone  
Data Type: Phone  
Field Name: Contact\_Phone  
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

Add Field Page Layout Name  
 Venue Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Save & New Save Cancel Previous Save & New Save Cancel Previous

Setup Home Object Manager

SETUP > OBJECT MANAGER: Venue

**Fields & Relationships**

- Details
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

**Master-Detail Relationship**  
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:  

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

**External Lookup Relationship**  
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

**Checkbox**  
Allows users to select a True (checked) or False (unchecked) value.

**Currency**  
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

**Date**  
Allows users to enter a date or pick a date from a popup calendar.

**Date/Time**  
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

**Email**  
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

**Geolocation**  
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

**Number**  
Allows users to enter any number. Leading zeros are removed.

**Percent**  
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

**Phone**  
Allows users to enter any phone number. Automatically formats it as a phone number.

**Picklist**  
Allows users to select a value from a list you define.

**Picklist (Multi-Select)**  
Allows users to select multiple values from a list you define.

**Text**  
Allows users to enter any combination of letters and numbers.

Setup Home Object Manager

SETUP > OBJECT MANAGER: Venue

**New Custom Field**

Step 2 of 4

Field Label: Location  
Enter the name of the location, such as Main Office. Be descriptive and specific, and remember that one record may have multiple locations, such as West Coast Sales Office and East Coast Sales Office.

Latitude and Longitude Display Notation:  Degrees, Minutes, Seconds  Decimal

Decimal Places: 4  
Number of digits to the right of the decimal point: 0

Field Name: Location  
Description:  
Help Text:  
Required:  Always require a value in this field in order to save a record.

Next Previous Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER: Venue

**New Custom Field**

Step 3. Establish field-level security Step 3 of 4

Previous Next Cancel

Field Label	Location	Visible	Read-Only
Analytics Cloud Integration User		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile		<input checked="" type="checkbox"/>	<input type="checkbox"/>

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Setup Home Object Manager

SETUP > OBJECT MANAGER: Venue

**New Custom Field**

Step 4. Add to page layouts Step 4 of 4

Previous Save & New Save Cancel

Field Label	Location	Data Type	Geolocation
Field Name	Location	Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field  Page Layout Name  
  Venue Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Setup Home Object Manager

SETUP > OBJECT MANAGER: Venue

**Fields & Relationships**

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

**Field Types**

- Currency
- Date
- DateTime
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted)
- Time
- URL

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 101,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Venue

**New Custom Field**

Step 2 of 4

Field Label: **Venue Location**

You are currently using 0 out of 1,636,400 characters on this object. You have 1,636,400 additional characters to allocate to this field.

Length: **32,768** (Max 131,072)

# Visible Lines: **3**

Field Name: **Venue\_Location**

Description:

Help Text:

Auto add to custom report type:  Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Previous Next Cancel Next

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Venue

**New Custom Field**

Step 4 of 4

Field Label: **Venue Location**

Data Type: Long Text Area

Field Name: **Venue\_Location**

Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field  Page Layout Name  
 **Venue Layout**

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

SETUP > OBJECT MANAGER  
Venue

**Fields & Relationships**  
8 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Contact Email	Contact_Email_c	Email		
Contact Phone	Contact_Phone_c	Phone		
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	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)		✓

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

The screenshot shows the Salesforce Object Manager interface. At the top, there is a search bar with the text "drop". Below it, a table lists one item: "Drop-Off Point" (API Name: Drop\_Off\_Point\_\_c), which is a "Custom Object". The table includes columns for Label, API Name, Type, Description, Last Modified, and Deployed. The "Deployed" column shows a checkmark.

The screenshot shows the "Fields & Relationships" section for the "Drop-Off Point" object. On the left, there is a sidebar with various configuration options like Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main area displays four fields: "Created By" (Field Label: Created By, Field Name: CreatedById, Data Type: Lookup(User)), "Drop-Off Point Name" (Field Label: Drop-Off Point Name, Field Name: Name, Data Type: Text(80)), "Last Modified By" (Field Label: Last Modified By, Field Name: LastModifiedById, Data Type: Lookup(User)), and "Owner" (Field Label: Owner, Field Name: OwnerId, Data Type: Lookup(User,Group)). The "CONTROLLING FIELD" and "INDEXED" columns are also visible.

Setup Home Object Manager

## SETUP > OBJECT MANAGER Drop-Off Point

**Fields & Relationships**

- Details
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

<input type="radio"/> Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
<input type="radio"/> Roll-Up Summary	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
<input type="radio"/> Lookup Relationship	Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
<input type="radio"/> Master-Detail Relationship	Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where: <ul style="list-style-type: none"> <li>The relationship field is required on all detail records.</li> <li>The ownership and sharing of a detail record are determined by the master record.</li> <li>When a user deletes the master record, all detail records are deleted.</li> <li>You can create rollup summary fields on the master record to summarize the detail records.</li> </ul>
<input type="radio"/> External Lookup Relationship	The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
<input type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.
<input type="radio"/> Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
<input type="radio"/> Date	Allows users to enter a date or pick a date from a popup calendar.
<input type="radio"/> Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
<input type="radio"/> Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
<input checked="" type="radio"/> Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
<input type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.
<input type="radio"/> Percent	Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.

Setup Home Object Manager

## SETUP > OBJECT MANAGER Drop-Off Point

**New Custom Field**

**Step 2. Enter the details**

Field Label: Location 2  
Enter the name of the location, such as Main Office. Be descriptive and specific, and remember that one record may have multiple locations, such as West Coast Sales Office and East Coast Sales Office.

Latitude and Longitude Display Notation:  Degrees, Minutes, Seconds  Decimal

Decimal Places: 4  
Number of digits to the right of the decimal point.

Field Name: Location\_2  
Enter the name of the field.

Description: Enter the Geolocation of the Drop off Point  
Enter the description of the field.

Help Text:  
Enter help text for the field.

Required:  Always require a value in this field in order to save a record

**Step 3 of 4**

Previous Next Cancel

Setup Home Object Manager

## SETUP > OBJECT MANAGER Drop-Off Point

**Drop-Off Point New Custom Field**

**Step 3. Establish field-level security**

Field Label: Location 2  
 Data Type: Geolocation  
 Field Name: Location\_2  
 Description: Enter the Geolocation of the Drop off Point

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Help for this Page

Step 3 of 4

Previous Next Cancel

**Drop-Off Point**

**New Custom Field**

**Step 4. Add to page layouts**

Field Label: Location\_2  
Data Type: Geolocation  
Field Name: Location\_2  
Description: Enter the Geolocation of the Drop off Point

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field: Page Layout Name  
 Drop-Off Point Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

**Drop-Off Point**

**New Custom Field**

**Step 1. Choose the field type**

Specify the type of information that the custom field will contain.

**Data Type**

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
  - The relationship field is required on all detail records.
  - The ownership and sharing of a detail record are determined by the master record.
  - When a user deletes the master record, all detail records are deleted.
  - You can create rollup summary fields on the master record to summarize the detail records.
- Master-Detail Relationship The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

**Drop-Off Point**

**New Custom Field**

**Step 2. Choose output type**

Field Label: distance calculation  
Field Name: distance\_calculation

Auto add to custom report type  Add this field to existing custom report types that contain this entity

**Formula Return Type**

- None Selected Select one of the data types below.
- Checkbox Calculate a boolean value  
Example: TODAY() > CloseDate
- Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount  
Example: (Gross Margin = Amount - Cost) \* 100
- Date Calculate a date, for example, by adding or subtracting days to other dates.  
Example: (Reminder Date = CloseDate - 7)
- Date/Time Calculate a datetime, for example, by adding a number of hours or days to another datetime.  
Example: (Next = NOW() + 1)
- Number Calculate a numeric value  
Example: (Fahrenheit = 1.8 \* Celsius\_c + 32)
- Percent Calculate a percent and automatically add the percent sign to the number.

Setup Home Object Manager

SETUP > OBJECT MANAGER Drop-Off Point

Example: `Fahrenheit = 1.8 * Celsius_c + 32` More Examples...

Simple Formula Advanced Formula

Insert Field Insert Operator Functions

distance calculation (Number) = DISTANCE( Location\_2\_c , Venue\_r.Location\_S , 'km' )

All Function Categories ABS ACOS ADDMONTHS AND ASCII ASIN

Check Syntax No syntax errors in merge fields or functions. (Compiled size: 670 characters)

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules

Setup Home Object Manager

SETUP > OBJECT MANAGER Drop-Off Point

Step 4: Establish field-level security Step 4 of 5

Previous Next Cancel

Field Label: distance calculation  
Data Type: Formula  
Field Name: distance\_calculation  
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Einstein Agent User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Setup > Object Manager > Drop-Off Point

### New Custom Field

**Step 5. Add to page layouts**

Help for this Page

Field Label	distance calculation
Data Type	Formula
Field Name	distance_calculation
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field  Page Layout Name  
 Drop-Off Point Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Save & New | Save | Cancel

Setup > Object Manager > Drop-Off Point

### Fields & Relationships

- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- Datetime
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text

object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Setup > Object Manager > Drop-Off Point

### New Custom Field

**Step 2. Enter the details**

Help for this Page

Field Label	State
Values	<input type="radio"/> Use global picklist value set <input checked="" type="radio"/> Enter values, with each value separated by a new line <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> Jammu &amp; Kashmir (UT)  Ladakh (UT)  Lakshadweep (UT)  Puducherry (UT) </div>
Field Name	State
Description	

Step 2 of 4

Previous | Next | Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Drop-Off Point

**Fields & Relationships**

Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules

Field Name: State  
Description:  
Help Text:  
Required:  Always require a value in this field in order to save a record  
Auto add to custom report type:  Add this field to existing custom report types that contain this entity  
Default Value: Show Formula Editor  
Use formula syntax: Enclose text and picklist value API names in double quotes : ("the\_text"), include numbers without quotes : (28), show percentages as decimals : (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata\_\_mdt.RecordAPIName.Field\_\_c

Previous Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Drop-Off Point

**Fields & Relationships**

Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules

**New Custom Field**

**Step 3. Establish field-level security** Step 3 of 4

Field Label: State  
Data Type: Picklist  
Field Name: State  
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Previous Next Cancel Next

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Drop-Off Point

**Fields & Relationships**

Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules

**New Custom Field**

**Step 4. Add to page layouts** Step 4 of 4

Field Label: State  
Data Type: Picklist  
Field Name: State  
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field: Page Layout Name  
 Drop-Off Point Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

SETUP > OBJECT MANAGER  
Drop-Off Point

Fields & Relationships		Fields & Relationships			
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)		
Lightning Record Pages	distance calculation	distance_calculation_c	Formula (Number)		
Buttons, Links, and Actions	Drop-Off Point Name	Name	Text(80)		
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)		
Field Sets	Location 2	Location_2_c	Geolocation		
Object Limits	Owner	OwnerId	Lookup(User,Group)		
Record Types	State	State_c	Picklist		
Related Lookup Filters	Venue	Venue_c	Lookup(Venue)		
Search Layouts					
List View Button Layout					
Restriction Rules					
Scoping Rules					

SETUP > OBJECT MANAGER  
Drop-Off Point

Fields & Relationships		Fields & Relationships			
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)		
Lightning Record Pages	distance calculation	distance_calculation_c	Formula (Number)		
Buttons, Links, and Actions	Drop-Off Point Name	Name	Text(80)		
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)		
Field Sets	Location 2	Location_2_c	Geolocation		
Object Limits	Owner	OwnerId	Lookup(User,Group)		
Record Types	State	State_c	Picklist		
Related Lookup Filters	Venue	Venue_c	Lookup(Venue)		
Search Layouts					
List View Button Layout					
Restriction Rules					
Scoping Rules					

SETUP  
**Object Manager**  
2 Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Task	Task_c	Custom Object		9/8/2025	
Task	Task	Standard Object			

Setup > Object Manager > Task

### Fields & Relationships

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)		✓
Task Name	Name	Text(80)		✓
Venue	Venue__c	Lookup(Venue)		✓

Setup > Object Manager > Task

### Fields & Relationships

- Roll-Up Summary: A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship: Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
  - The relationship field is required on all detail records.
  - The ownership and sharing of a detail record are determined by the master record.
  - When a user deletes the master record, all detail records are deleted.
  - You can create rollup summary fields on the master record to summarize the detail records.
- External Lookup Relationship: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

- Checkbox: Allows users to select a True (checked) or False (unchecked) value.
- Currency: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date: Allows users to enter a date or pick a date from a popup calendar.
- DateTime: Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Email: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Geolocation: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number: Allows users to enter any number. Leading zeros are removed.
- Percent: Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.
- Phone: Allows users to enter any phone number. Automatically formats it as a phone number.
- Text: Allows users to select a value from a list you define.

Setup > Object Manager > Task

### New Custom Field

Step 2. Enter the details

Field Label: Distance

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: 14	Decimal Places: 4
Field Name: Distance	Number of digits to the right of the decimal point:
Description:	Help Text:

Required:  Always require a value in this field in order to save a record

Unique:  Do not allow duplicate values

External ID:  Set this field as the unique record identifier from an external system

AI Prediction:  Use this field to store AI prediction scores

Setup Home Object Manager

SETUP > OBJECT MANAGER Task

New Custom Field

Step 3. Establish field-level security Step 3 of 4

Field Label: Distance  
Data Type: Number  
Field Name: Distance  
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
AnyPoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B2B Rendering Portal Buyer Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Previous Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER Task

New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label: Distance  
Data Type: Number  
Field Name: Distance  
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name  
 Task Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

#### d) Creation of fields for the Task object

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar is titled 'Task' and includes options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The 'Fields & Relationships' option is selected. The main area is titled 'New Custom Field' and 'Step 1. Choose the field type'. It asks to specify the type of information the custom field will contain. The 'Data Type' section shows several options: 'None Selected' (selected), 'Auto Number' (description: A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.), 'Formula' (description: A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.), 'Roll-Up Summary' (description: A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.), 'Lookup Relationship' (description: Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.), and 'Master-Detail Relationship' (description: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where: • The relationship field is required on all detail records. • The ownership and sharing of a detail record are determined by the master record. • When a user deletes the master record, all detail records are deleted. • You can create rollup summary fields on the master record to summarize the detail records.). There are 'Next' and 'Cancel' buttons at the top right.

The screenshot shows the continuation of the custom field creation process. The left sidebar remains the same. The main area is titled 'New Custom Field' and 'Step 2. Enter the details'. It contains fields for 'Field Label' (Task ID), 'Display Format' (TASK-{0}), 'Starting Number' (1), 'Generate Auto Number for existing records' (checkbox checked), 'Field Name' (Task.ID), 'Description' (empty), and 'Help Text' (empty). At the bottom, there are checkboxes for 'External ID' (Set this field as the unique record identifier from an external system) and 'Auto add to custom report type' (Add this field to existing custom report types that contain this entity). There are 'Previous', 'Next', and 'Cancel' buttons at the bottom right.

Setup Home Object Manager

## Task

SETUP > OBJECT MANAGER

**Task**

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules

New Custom Field

Step 3. Establish field-level security Step 3 of 4

Field Label: Task ID Data Type: Auto Number Field Name: Task\_ID Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Previous Next Cancel Next

Setup Home Object Manager

## Task

SETUP > OBJECT MANAGER

**Task**

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules

New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label: Task ID Data Type: Auto Number Field Name: Task\_ID Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field  Page Layout Name  Task Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Setup Home Object Manager

## Task

SETUP > OBJECT MANAGER

**Task**

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules

Data Type

Select one of the data types below.

- None Selected
- Auto Number: A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula: A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary: A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship: Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
  - The relationship field is required on all detail records.
  - The ownership and sharing of a detail record are determined by the master record.
  - When a user deletes the master record, all detail records are deleted.
  - You can create rollup summary fields on the master record to summarize the detail records.
- Master-Detail Relationship: The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
- External Lookup Relationship: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

- Checkbox: Allows users to select a True (checked) or False (unchecked) value.
- Currency: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date: Allows users to enter a date or pick a date from a popup calendar.
- Date/Time: Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Email: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Setup > Object Manager Task

### New Custom Field

Step 2. Enter the details

Field Label: Date

Field Name: Date

Description:

Help Text:

Required:  Always require a value in this field in order to save a record

Auto add to custom report type:  Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes : ("the\_text"); include numbers without quotes : (25), show percentages as decimals : (0.10), and express date calculations in the standard format : (today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadataType\_\_mdt.RecordAPIName.Field\_\_c

Step 2 of 4 Previous Next Cancel

Setup > Object Manager Task

### New Custom Field

Step 3. Establish field-level security

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
AnyPoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Step 3 of 4 Previous Next Cancel

Setup > Object Manager > Task

### New Custom Field

**Step 4. Add to page layouts**

Help for this Page

Field Label: Date  
 Data Type: Date  
 Field Name: Date  
 Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

Add Field Page Layout Name  
 Task Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Setup > Object Manager > Task

### Fields & Relationships

- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text

object is the source of the values in the list.  
 Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:  

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

 The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Setup > Object Manager > Task

### New Custom Field

**Step 2. Enter the details**

Help for this Page

Field Label: Food Category  
 Values  
 Use global picklist value set  
 Enter values, with each value separated by a new line

Veg  
 Non-Veg  
 Salad  
 Snack

Display values alphabetically, not in the order entered  
 Use first value as default value  
 Restrict picklist to the values defined in the value set

Field Name: Food\_Category  
 Description:

Setup Home Object Manager

SETUP > OBJECT MANAGER Task

**New Custom Field**

Step 3 of 4

Field Label: Food Category  
Data Type: Picklist  
Field Name: Food\_Category  
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Previous Next Cancel Next

Setup Home Object Manager

SETUP > OBJECT MANAGER Task

**New Custom Field**

Step 4 of 4

Field Label: Food Category  
Data Type: Picklist  
Field Name: Food\_Category  
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field  Page Layout Name  
 Task Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel Save

Setup Home Object Manager

SETUP > OBJECT MANAGER Task

**Fields & Relationships**

Details  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

Formula  
Roll-Up Summary  
Lookup Relationship  
Master-Detail Relationship  
External Lookup Relationship  
Checkbox  
Currency  
Date  
DateTime  
Email  
Geolocation  
Number  
Percent

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.  
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.  
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass email.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.

SETUP > OBJECT MANAGER

## Task

New Custom Field

Step 2. Enter the details

Field Label: Number of People Served

Please enter the length of the number and the number of decimal places. For example, a number with a length of 6 and 2 decimal places can accept values up to "12345678.90".

Length:	18	Decimal Places:	0
Field Name:	Number_of_People_Served	Number of digits to the right of the decimal point	
Description:			
Help Text:			

Required:  Always require a value in this field in order to save a record.

Unique:  Do not allow duplicate values.

External ID:  Set this field as the unique record identifier from an external system.

AI Prediction:  Use this field to store AI prediction scores.

Step 2 of 4

Previous Next Cancel

SETUP > OBJECT MANAGER

## Task

New Custom Field

Step 3. Establish field-level security

Field Label: Number of People Served  
 Data Type: Number  
 Field Name: Number\_of\_People\_Served  
 Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Step 3 of 4

Previous Next Cancel

SETUP > OBJECT MANAGER

## Task

New Custom Field

Step 4. Add to page layouts

Field Label: Number of People Served  
 Data Type: Number  
 Field Name: Number\_of\_People\_Served  
 Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field  Page Layout Name  
 Task Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Step 4 of 4

Previous Save & New Save Cancel

Setup Home Object Manager

## Task

SETUP > OBJECT MANAGER

**Fields & Relationships**

- Details
- External Lookup Relationship
- Checkbox
- Currency
- Date
- DateTime
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text**
- Text Area
- Text Area (Long)
- Text Area (Rich)

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce.org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the DateTime field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Setup Home Object Manager

## Task

SETUP > OBJECT MANAGER

**New Custom Field**

Step 2. Enter the details Step 2 of 4

Help for this Page

Field Label: Name of the Person

Length: 15

Field Name: Name\_of\_the\_Person

Description:

Help Text:

Required:  Always require a value in this field in order to save a record

Unique:  Do not allow duplicate values
 

- Treat "ABC" and "abc" as duplicate values (case insensitive)
- Treat "ABC" and "abc" as different values (Case Sensitive)

External ID:  Set this field as the unique record identifier from an external system

Auto add to custom report type:  Add this field to existing custom report types that contain this entity

Previous Next Cancel

Setup Home Object Manager

## Task

SETUP > OBJECT MANAGER

**New Custom Field**

Step 3. Establish field-level security Step 3 of 4

Help for this Page

Field Label: Name of the Person

Data Type: Text

Field Name: Name\_of\_the\_Person

Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Next

Setup Home Object Manager

## Task

### New Custom Field

Step 4 of 4

**Field Label:** Name of the Person  
**Data Type:** Text  
**Field Name:** Name\_of\_the\_Person  
**Description:**

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

Add Field Page Layout Name  
 Task Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Setup Home Object Manager

## Task

### Fields & Relationships

- External Lookup Relationship
- Checkbox
- Currency
- Date
- DateTime
- Email
- Geolocation
- Number
- Percent
- Phone**
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.  
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.  
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.  
Allows users to enter a date or pick a date from a popup calendar.  
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.  
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.  
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.  
Allows users to enter any number. Leading zeros are removed.  
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.  
Allows users to enter any phone number. Automatically formats it as a phone number.  
Allows users to select a value from a list you define.  
Allows users to select multiple values from a list you define.  
Allows users to enter any combination of letters and numbers.  
Allows users to enter up to 250 characters on separate lines.  
Allows users to enter up to 131,072 characters on separate lines.  
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Setup Home Object Manager

## Task

### New Custom Field

Step 2 of 4

**Field Label:** Phone  
**Field Name:** Phone  
**Description:**  
**Help Text:**

**Required:**  Always require a value in this field in order to save a record  
**Auto add to custom report type:**  Add this field to existing custom report types that contain this entity

**Default Value:** Show Formula Editor

Use formula syntax. Enclose text and picklist value API names in double quotes. ("title\_list") includes numbers without quotes (25), show percentages as decimals (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type\_\_mdt.RecordAPIName.Field\_\_c

Previous Next Cancel

Setup Home Object Manager

## Task

### New Custom Field

Step 3 of 4

Field Label: Phone  
Data Type: Phone  
Field Name: Phone  
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
AnyPoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Webstore	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Previous Next Cancel Next

Setup Home Object Manager

## Task

### New Custom Field

Step 4 of 4

Field Label: Phone  
Data Type: Phone  
Field Name: Phone  
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name  
 Task Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Setup Home Object Manager

## Task

Details

### Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Setup Home Object Manager

SETUP > OBJECT MANAGER Task

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: Rating

Values:

- Use global picklist value set
- Enter values, with each value separated by a new line

2  
3  
4  
5

Display values alphabetically, not in the order entered

Use first value as default value

Restrict picklist to the values defined in the value set

Field Name: Rating

Description:

Help for this Page

Previous Next Cancel

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules

Setup Home Object Manager

SETUP > OBJECT MANAGER Task

New Custom Field

Step 3. Establish field-level security Step 3 of 4

Field Label: Rating  
Data Type: Picklist  
Field Name: Rating  
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Help for this Page

Previous Next Cancel

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules

Setup Home Object Manager

## Task

SETUP > OBJECT MANAGER

### New Custom Field

Step 4 of 4

**Step 4. Add to page layouts**

Field Label: Rating  
Data Type: Picklist  
Field Name: Rating  
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field  Page Layout Name  Task Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Setup Home Object Manager

## Task

SETUP > OBJECT MANAGER

### Fields & Relationships

- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.  
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce.org.

Allows users to select a True (checked) or False (unchecked) value.  
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.  
Allows users to enter a date or pick a date from a popup calendar.  
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.  
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.  
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.  
Allows users to enter any number. Leading zeros are removed.  
Allows users to enter a percentage number. For example, "10" and automatically adds the percent sign to the number.  
Allows users to enter any phone number. Automatically formats it as a phone number.  
Allows users to select a value from a list you define.  
Allows users to select multiple values from a list you define.  
Allows users to enter any combination of letters and numbers.  
Allows users to enter up to 255 characters on separate lines.  
Allows users to enter up to 131,072 characters on separate lines.  
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Setup Home Object Manager

## Task

SETUP > OBJECT MANAGER

### New Custom Field

Step 2 of 4

**Step 2. Enter the details**

Field Label: Feedback

You are currently using 0 out of 1,638,400 characters on this object. You have 1,638,400 additional characters to allocate to this field.

Length: 32,768 (Max 131,072)

# Visible Lines: 3  
Field Name: Feedback  
Description:  
Help Text:

Auto add to custom report type  Add this field to existing custom report types that contain this entity

Default Value Close Schema Editor

Setup Home Object Manager

### Task

#### New Custom Field

Step 3. Establish field-level security Step 3 of 4

Field Label: Feedback  
Data Type: Long Text Area  
Field Name: Feedback  
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	<input type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Previous Next Cancel

Setup Home Object Manager

### Task

#### New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label: Feedback  
Data Type: Long Text Area  
Field Name: Feedback  
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field  Page Layout Name  
 Task Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Setup Home Object Manager

### Task

#### Fields & Relationships

15 Items, Sorted by Field Label

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)	<input checked="" type="checkbox"/>	
Feedback	Feedback_c	Long Text Area(32768)		
Food Category	Food_Category_c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name of the Person	Name_of_the_Person_c	Text(15)		
Number of People Served	Number_of_People_Served_c	Number(18, 0)		

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Fields & Relationships			
15 Items, Sorted by Field Label			
Food Category	Food_Category__c	Picklist	
Last Modified By	LastModifiedById	Lookup(User)	
Name of the Person	Name_of_the_Person__c	Text(15)	
Number of People Served	Number_of_People_Served__c	Number(18, 0)	
Owner	OwnerId	Lookup(User/Group)	✓
Phone	Phone__c	Phone	
Rating	Rating__c	Picklist	
Task ID	Task_ID__c	Auto Number	
Task Name	Name	Text(80)	✓
Venue	Venue__c	Lookup(Venue)	✓

### e) Creation of fields for the Volunteer object

Object Manager						
1 Items, Sorted by Label						
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED	
Volunteer	Volunteer__c	Custom Object		9/8/2025	✓	

Volunteer						
Fields & Relationships						
4 Items, Sorted by Field Label						
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED		
Created By	CreatedById	Lookup(User)				
Drop-Off Point	Drop_Off_Point__c	Master-Detail(Drop-Off Point)	✓			
Last Modified By	LastModifiedById	Lookup(User)				
Volunteer Name	Name	Text(80)	✓			

Cloud icon

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER: Volunteer

**New Custom Field**

Step 1. Choose the field type

Specify the type of information that the custom field will contain

**Data Type**

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Help for this Page

Next Cancel

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Cloud icon

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER: Volunteer

**New Custom Field**

Step 2. Enter the details

Field Label: Volunteer ID

Display Format: Example: A-0000 | What Is This?

Starting Number: 1

Generate Auto Number for existing records:

Field Name: Volunteer\_ID

Description:

Help Text:

External ID:  Set this field as the unique record identifier from an external system

Auto add to custom report type:  Add this field to existing custom report types that contain this entity

Previous Next Cancel

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

SETUP > OBJECT MANAGER  
**Volunteer**

**Fields & Relationships**

Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

**New Custom Field**

**Step 3. Establish field-level security**

Field Label: Volunteer ID  
Data Type: Auto Number  
Field Name: Volunteer\_ID  
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input checked="" type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Step 3 of 4**

Previous Next Cancel

SETUP > OBJECT MANAGER  
**Volunteer**

**Fields & Relationships**

Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

**New Custom Field**

**Step 4. Add to page layouts**

Field Label: Volunteer ID  
Data Type: Auto Number  
Field Name: Volunteer\_ID  
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field  Page Layout Name  
 Volunteer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

**Step 4 of 4**

Previous Save & New Save Cancel

SETUP > OBJECT MANAGER  
**Volunteer**

**Fields & Relationships**

Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list. Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

<input type="radio"/> External Lookup Relationship	Allows users to select a True (checked) or False (unchecked) value.
<input type="radio"/> Checkbox	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
<input type="radio"/> Currency	Allows users to enter a date or pick a date from a popup calendar.
<input type="radio"/> Date	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
<input type="radio"/> Date/Time	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
<input type="radio"/> Email	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
<input type="radio"/> Geolocation	Allows users to enter any number. Leading zeros are removed.
<input type="radio"/> Number	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
<input type="radio"/> Percent	Allows users to enter any phone number. Automatically formats it as a phone number.
<input type="radio"/> Phone	Allows users to select a value from a list you define.
<input checked="" type="radio"/> Picklist	Allows users to select multiple values from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to enter any combination of letters and numbers.
<input type="radio"/> Text	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> Text Area	Allows users to enter up to 131,072 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
<input type="radio"/> Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Volunteer

Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

Volunteer New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: Gender

Values:

- Use global picklist value set
- Enter values, with each value separated by a new line

Female  
Male

Display values alphabetically, not in the order entered  
 Use first value as default value  
 Restrict picklist to the values defined in the value set

Field Name: Gender  
Description:

Help for this Page

Previous Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Volunteer

Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

Volunteer New Custom Field

Step 3. Establish field-level security Step 3 of 4

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Help for this Page

Previous Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Volunteer

Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

Volunteer New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label	Gender	Data Type	Picklist	Field Name	Gender	Description
-------------	--------	-----------	----------	------------	--------	-------------

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field  
 Page Layout Name  
 Volunteer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Help for this Page

Previous Save & New Save Cancel

Setup Home Object Manager

### SETUP > OBJECT MANAGER: Volunteer

**Fields & Relationships**

- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- DateTime
- Email
- Geolocation
- Number
- Percent

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the DateTime field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Setup Home Object Manager

### SETUP > OBJECT MANAGER: Volunteer

**New Custom Field**

**Step 2. Enter the details**

Field Label: Available On

Field Name: Av

Description:

Help Text:

Required:  Always require a value in this field in order to save a record

Auto add to custom report type:  Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Use formula syntax. Enclose text and picklist value API names in double quotes ("the\_text"). Include numbers without quotes (.25), show percentages as decimals (.10), and express date calculations in the standard format: (Today) + 7. To reference a field from a Custom Metadata type record use: \$CustomMetadata\_\_Type\_\_mdt.RecordName.Field\_\_c

Step 2 of 4 Previous Next Cancel

Setup Home Object Manager

### SETUP > OBJECT MANAGER: Volunteer

**New Custom Field**

**Step 3. Establish field-level security**

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B2B Ordering Portal Buyer Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Step 3 of 4 Previous Next Cancel

Setup Home Object Manager

### Volunteer

SETUP > OBJECT MANAGER

**New Custom Field**

Step 4. Add to page layouts Step 4 of 4

Field Label Available On  
Data Type Date  
Field Name Av  
Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name  
 Volunteer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Setup Home Object Manager

### Volunteer

SETUP > OBJECT MANAGER

**Fields & Relationships**

- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number**
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.  
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.  
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.  
Allows users to enter a date or pick a date from a popup calendar.  
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.  
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.  
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.  
Allows users to enter any number. Leading zeros are removed.  
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.  
Allows users to enter any phone number. Automatically formats it as a phone number.  
Allows users to select a value from a list you define.  
Allows users to select multiple values from a list you define.  
Allows users to enter any combination of letters and numbers.  
Allows users to enter up to 256 characters on separate lines.  
Allows users to enter up to 131,072 characters on separate lines.  
Allows users to enter formatted text; add images and links. Up to 131,072 characters on separate lines.

Setup Home Object Manager

### Volunteer

SETUP > OBJECT MANAGER

**New Custom Field**

Step 2. Enter the details Step 2 of 4

Field Label Age

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length	3	Decimal Places	0
Field Name	Age	Number of digits to the right of the decimal point	
Description			
Help Text			

Required  Always require a value in this field in order to save a record  
 Do not allow duplicate values  
 Set this field as the unique record identifier from an external system  
 Use this field to store AI prediction scores

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Volunteer**

volunteer  
**New Custom Field**

Help for this Page

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Step 3 of 4

Previous Next Cancel

Field Label: Age  
Data Type: Number  
Field Name: Age  
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	✓	<input type="checkbox"/>
Analytics Cloud Security User	✓	<input type="checkbox"/>
Anypoint Integration	✓	<input type="checkbox"/>
Authenticated Website	✓	<input type="checkbox"/>
Authenticatede Website	✓	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	✓	<input type="checkbox"/>
Contract Manager	✓	<input type="checkbox"/>
Cross Org Data Proxy User	✓	<input type="checkbox"/>
Custom Marketing Profile	✓	<input type="checkbox"/>

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Volunteer**

volunteer  
**New Custom Field**

Help for this Page

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Step 4 of 4

Previous Save & New Save Cancel

Field Label: Age  
Data Type: Number  
Field Name: Age  
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name  
 Volunteer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Volunteer**

**Fields & Relationships**

**Data Type**

Select one of the data types below.

- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Volunteer**

**Fields & Relationships**

**New Custom Field**

**Step 2. Enter the details**

Field Label:

Field Name:

Description:

Help Text:

Required:  Always require a value in this field in order to save a record

Unique:  Do not allow duplicate values

External ID:  Set this field as the unique record identifier from an external system

Auto add to custom report type:  Add this field to existing custom report types that contain this entity

Default Value:

Use formula syntax. Enclose text and picklist value API names in double quotes: ("the\_text"), include numbers without quotes: (25), show percentages as decimals: (0.10), and express date calculations in

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Volunteer

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules

Volunteer New Custom Field Step 3 of 4

Field Label: Email Data Type: Email Field Name: Email Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B2B Rendering Portal Buyer Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Previous Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Volunteer

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules

Volunteer New Custom Field Step 4 of 4

Field Label: Email Data Type: Email Field Name: Email Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name  Volunteer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Volunteer

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules

Formula Roll-Up Summary

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Checkbox Currency Date Date/Time Email Geolocation Number Percent

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

SETUP > OBJECT MANAGER  
**Volunteer**

**Fields & Relationships**

Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

**New Custom Field**

**Step 2. Enter the details**

Field Label: Contact Number  
Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: 10  
Number of digits to the left of the decimal point.

Field Name: Contact\_Number  
Number of digits to the right of the decimal point.

Description:  
Help Text:

Required:  Always require a value in this field in order to save a record  
Unique:  Do not allow duplicate values  
External ID:  Set this field as the unique record identifier from an external system  
AI Prediction:  Use this field to store AI prediction scores

**Step 2 of 4** | Previous | Next | Cancel

SETUP > OBJECT MANAGER  
**Volunteer**

**Fields & Relationships**

Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

**New Custom Field**

**Step 3. Establish field-level security**

Field Label: Contact Number  
Data Type: Number  
Field Name: Contact\_Number  
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Step 3 of 4** | Previous | Next | Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Volunteer

Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

Volunteer New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label: Contact Number  
Data Type: Number  
Field Name: Contact\_Number  
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

Add Field Page Layout Name  
 Volunteer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Save & New Save Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Volunteer

Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

External Lookup Relationship  
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Checkbox  
Allows users to select a True (checked) or False (unchecked) value.

Currency  
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Date  
Allows users to enter a date or pick a date from a popup calendar.

Date/Time  
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Email  
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Geolocation  
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Number  
Allows users to enter any number. Leading zeros are removed.

Percent  
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Phone  
Allows users to enter any phone number. Automatically formats it as a phone number.

Picklist  
Allows users to select a value from a list you define.

Picklist (Multi-Select)  
Allows users to select multiple values from a list you define.

Text  
Allows users to enter any combination of letters and numbers.

Text Area  
Allows users to enter up to 255 characters on separate lines.

Text Area (Long)  
Allows users to enter up to 131,072 characters on separate lines.

Text Area (Rich)  
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Volunteer

Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules

Volunteer New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: Address  
Field Name: Address  
Description:  
Help Text:

Required:  Always require a value in this field in order to save a record  
Auto add to custom report type:  Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes ("the\_text"), include numbers without quotes (25), show percentages as decimals (.10), and express date calculations in the standard format: (today() + 7). To reference a field from a Custom Metadata type record use: \$customMetadataType\_\_md.RecordName.FieldName

SETUP > OBJECT MANAGER  
**Volunteer**

**Fields & Relationships**

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

**Volunteer New Custom Field**

**Step 3. Establish field level security**

Field Label	Address	Visible	Read-Only
Analytics Cloud Integration User	✓	✗	
Analytics Cloud Security User	✓	✗	
Anypoint Integration	✓	✗	
Authenticated Website	✓	✗	
B2B Reordering Portal Buyer Profile	✓	✗	
Contract Manager	✓	✗	
Cross Org Data Proxy User	✓	✗	
Custom Marketing Profile	✓	✗	

**Step 3 of 4**

[Previous](#) [Next](#) [Cancel](#)

SETUP > OBJECT MANAGER  
**Volunteer**

**Fields & Relationships**

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

**Volunteer New Custom Field**

**Step 4. Add to page layouts**

Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Volunteer Layout

When finished, click **Save & New** to create more custom fields, or click **Save** if you are done.

**Step 4 of 4**

[Previous](#) [Save & New](#) [Save](#) [Cancel](#)

SETUP > OBJECT MANAGER  
**Volunteer**

**Fields & Relationships**

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

**Data Type**

Select one of the data types below:

- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship
  - Master-detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Volunteer**

**New Custom Field**

Step 2. Enter the details Step 2 of 4

Field Label: Date of Birth

Field Name: Date\_of\_Birth

Description:

Help Text:

Required:  Always require a value in this field in order to save a record

Auto add to custom report type:  Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Use formula syntax. Enclose text and picklist value API names in double quotes ('the text'), include numbers without quotes (25), show percentages as decimals (.10), and express date calculations in the standard format: (today() + 7). To reference a field from a Custom Metadata type record use: sCustomMetadataType\_\_mdt.RecordAPIName.Field\_c

Previous Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Volunteer**

**New Custom Field**

Step 3. Establish field-level security Step 3 of 4

Field Label: Date of Birth

Data Type: Date

Field Name: Date\_of\_Birth

Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Previous Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Volunteer**

**New Custom Field**

Step 4. Add to page layouts Step 4 of 4

Field Label: Date of Birth

Data Type: Date

Field Name: Date\_of\_Birth

Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field - Page Layout Name:  Volunteer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

SETUP > OBJECT MANAGER  
**Volunteer**

Compact Layouts	Fields & Relationships				
Field Sets	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Object Limits	Address	Address_c	Text Area(255)		
Record Types	Age	Age_c	Number(3, 0)		
Related Lookup Filters	Available On	Av_c	Date		
Search Layouts	Contact Number	Contact_Number_c	Number(10, 0)		
List View Button Layout	Created By	CreatedById	Lookup(User)		
Restriction Rules	Date of Birth	Date_of_Birth_c	Date		
Scoping Rules	Drop-Off Point	Drop_Off_Point_c	Master-Detail(Drop-Off Point)	✓	
Object Access	Email	Email_c	Email		
Triggers	Gender	Gender_c	Picklist		
Flow Triggers					
Validation Rules					
Conditional Field Formatting					

SETUP > OBJECT MANAGER  
**Volunteer**

Compact Layouts	Fields & Relationships				
Field Sets	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Object Limits	Available On	Av_c	Date		
Record Types	Contact Number	Contact_Number_c	Number(10, 0)		
Related Lookup Filters	Created By	CreatedById	Lookup(User)		
Search Layouts	Date of Birth	Date_of_Birth_c	Date		
List View Button Layout	Drop-Off Point	Drop_Off_Point_c	Master-Detail(Drop-Off Point)	✓	
Restriction Rules	Email	Email_c	Email		
Scoping Rules	Gender	Gender_c	Picklist		
Object Access	Last Modified By	LastModifiedById	Lookup(User)		
Triggers	Volunteer ID	Volunteer_ID_c	Auto Number		
Flow Triggers	Volunteer Name	Name	Text(80)	✓	
Validation Rules					
Conditional Field Formatting					

### f) Creation of fields for the Execution Details object

SETUP > OBJECT MANAGER  
**Execution Detail**

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Execution_Detail	Execution_Detail_c	Custom Object		9/8/2025	✓

Setup > Object Manager > Execution Detail

### Fields & Relationships

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)		✓

Setup > Object Manager > Execution Detail

### New Custom Field

**Step 1. Choose the field type**

Specify the type of information that the custom field will contain.

**Data Type**

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
  - The relationship field is required on all detail records.
  - The ownership and sharing of a detail record are determined by the master record.
  - When a user deletes the master record, all detail records are deleted.
  - You can create rollup summary fields on the master record to summarize the detail records.

Help for this Page

Setup > Object Manager > Execution Detail

### New Custom Field

**Step 2. Enter the details**

Field Label: **Execution ID**

Display Format: **A-0000** Example: A-0000 What Is This?

Starting Number: **1**

Generate Auto Number for existing records

Field Name: **Execution\_ID**

Description:

Help Text:

External ID:  Set this field as the unique record identifier from an external system

Auto add to custom report type:  Add this field to existing custom report types that contain this entity

Help for this Page

Setup Home Object Manager

### Execution Detail

#### New Custom Field

Step 3 of 4

Field Label: Execution ID  
Data Type: Auto Number  
Field Name: Execution\_ID  
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Help for this Page

Previous Next Cancel Next

Setup Home Object Manager

### Execution Detail

#### New Custom Field

Step 4 of 4

Field Label: Execution ID  
Data Type: Auto Number  
Field Name: Execution\_ID  
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field  Page Layout Name  
 Execution Detail Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Setup Home Object Manager

### Execution Detail

#### Fields & Relationships

6 items. Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Execution Detail Name	Name	Text(90)		<input checked="" type="checkbox"/>
Execution ID	Execution_ID_c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Task	Task_c	Master-Detail(Task)		<input checked="" type="checkbox"/>
Volunteer	Volunteer_c	Master-Detail(Volunteer)		<input checked="" type="checkbox"/>

Quick Find New Deleted Fields Field Dependencies Set History Tracking

## 6) Creation of Flow to create a record in Venue object

The screenshot shows the Salesforce Setup Home page. The left sidebar is titled "Setup" and includes sections for Apps (Lightning Bolt, Einstein, Einstein Generative AI, Process Automation), Flows (Migrate to Flow, Paused And Failed Flow, Interviews, Process Builder), and Workflow Actions (Email Alerts, Field Updates, Outbound Messages, Send Actions). The main content area displays three cards: "Data Cloud" (Setup), "Get Started with Einstein Bots" (Setup), and "Mobile Publisher" (Setup). Below these cards is a section titled "Most Recently Used" with a table showing recent items. The table has columns for NAME, TYPE, and OBJECT.

NAME	TYPE	OBJECT
Execution ID	Custom Field Definition	Execution Detail
Date of Birth	Custom Field Definition	Volunteers
Address	Custom Field Definition	Unlabelled

The screenshot shows the Salesforce Flows page. The left sidebar is identical to the previous screenshot. The main content area is titled "Flows" and shows a list of "All Flows". The table has columns for Flow Label, Process Type, Active, Template, Package State, Pockag..., Last M..., and Last M... . The table lists various flows such as "Add or Modify Service Appointment Attendees", "Approvals Workflow: Evaluate Approval Requests", "Approvals Workflow: Process Approval Submission", etc.

Flow Label	Process Type	Active	Template	Package State	Pockag...	Last M...	Last M...
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Approvals Workflow: Evaluate Approval Requests	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Approvals Workflow: Process Approval Submission	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Authentication Provider User Registration	Identity User Registration Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Chats Routed to Agents and Queues	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Chats Routed to Agents with the Right Skills	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Check Flow API Name	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Check Service Plan Eligibility	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

## New Automation

Get Started with Automations  
Select a category, flow type, use search, or let Einstein build an automation for you.

Categories

- Triggered**  
Automations launched by records and events. This type of automation runs without user interaction.  
[View All >](#)
- Scheduled**  
Time-based automations that launch at a specific time or frequency. This type of automation runs without user interaction.  
[View All >](#)
- Screen**  
Interface-driven automations that guide users through business processes. This type of automation collects or displays...  
[View All >](#)
- Autolaunched**  
Automations that automatically launch when invoked by APIs, templates, processes, conditions, or something else...  
[View All >](#)

Frequently Used

- Record-Triggered Flow**  
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
- Screen Flow**  
Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, an...
- Schedule-Triggered Flow**  
Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the...
- Autolaunched Flow (No Trigger)**  
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the...

[View All >](#)

Get more on the AppExchange

## New Automation

Get Started with Automations  
Select a category, flow type, use search, or let Einstein build an automation for you.

Categories

- Triggered**  
Automations launched by records and events. This type of automation runs without user interaction.  
[View All >](#)
- Scheduled**  
Time-based automations that launch at a specific time or frequency. This type of automation runs without user interaction.  
[View All >](#)
- Screen**  
Interface-driven automations that guide users through business processes. This type of automation collects or displays...  
[View All >](#)
- Autolaunched**  
Automations that automatically launch when invoked by APIs, templates, processes, conditions, or something else...  
[View All >](#)

Frequently Used

- Record-Triggered Flow**  
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
- Screen Flow**  
Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, an...
- Schedule-Triggered Flow**  
Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the...
- Autolaunched Flow (No Trigger)**  
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the...

[View All >](#)

Get more on the AppExchange

## New Automation

**Screen Automations**  
Showing 38 of 73 results

Filter By  Triggered  Scheduled  Screen  AutoLaunched

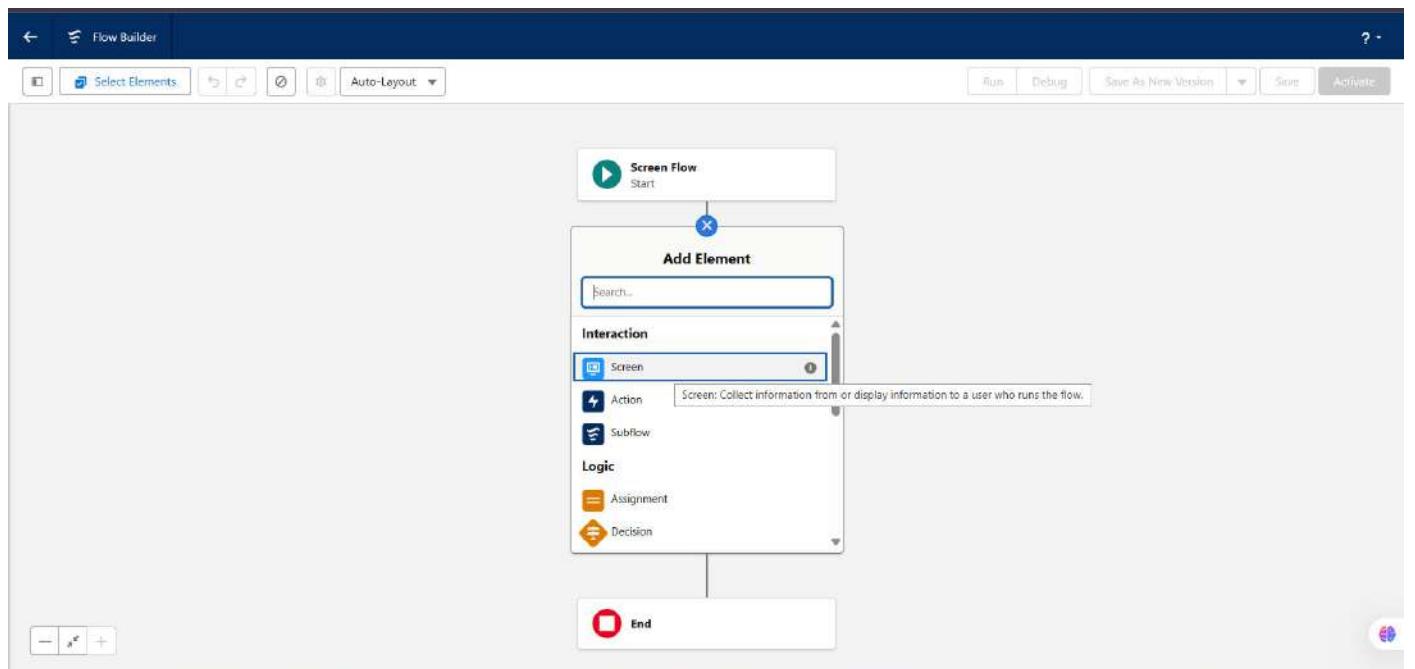
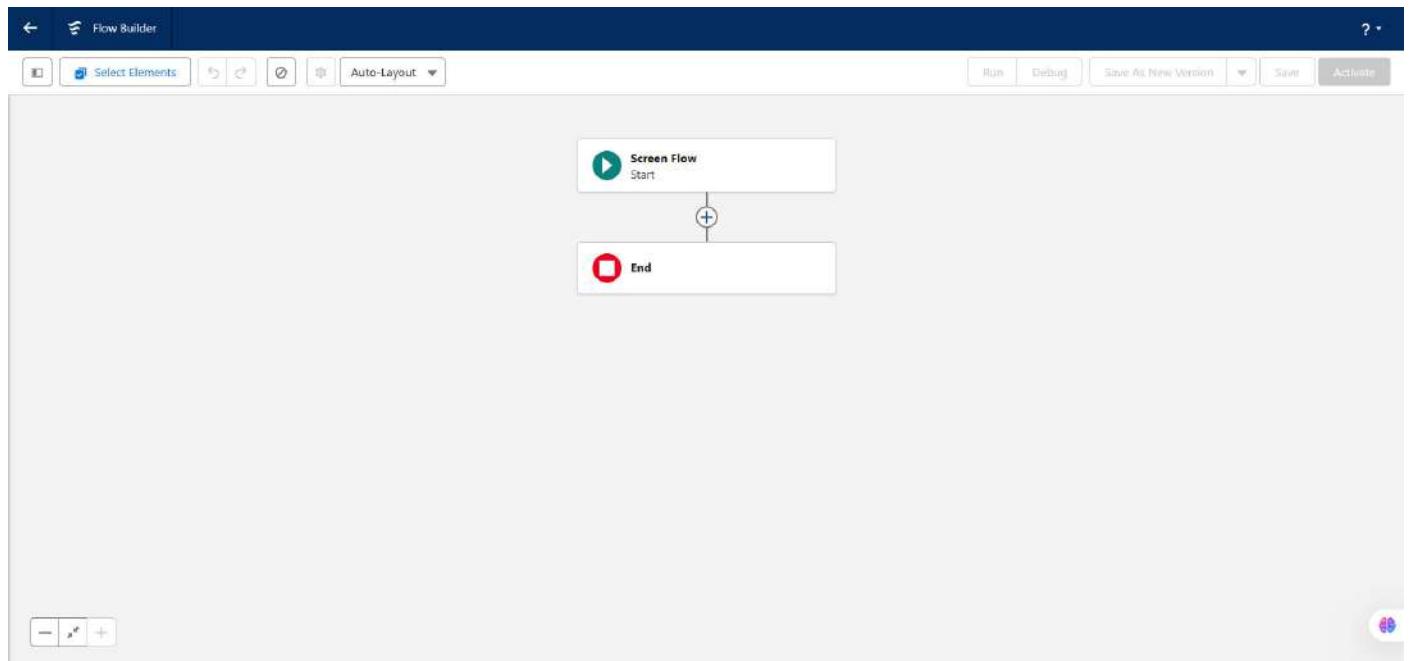
**Types (5)**

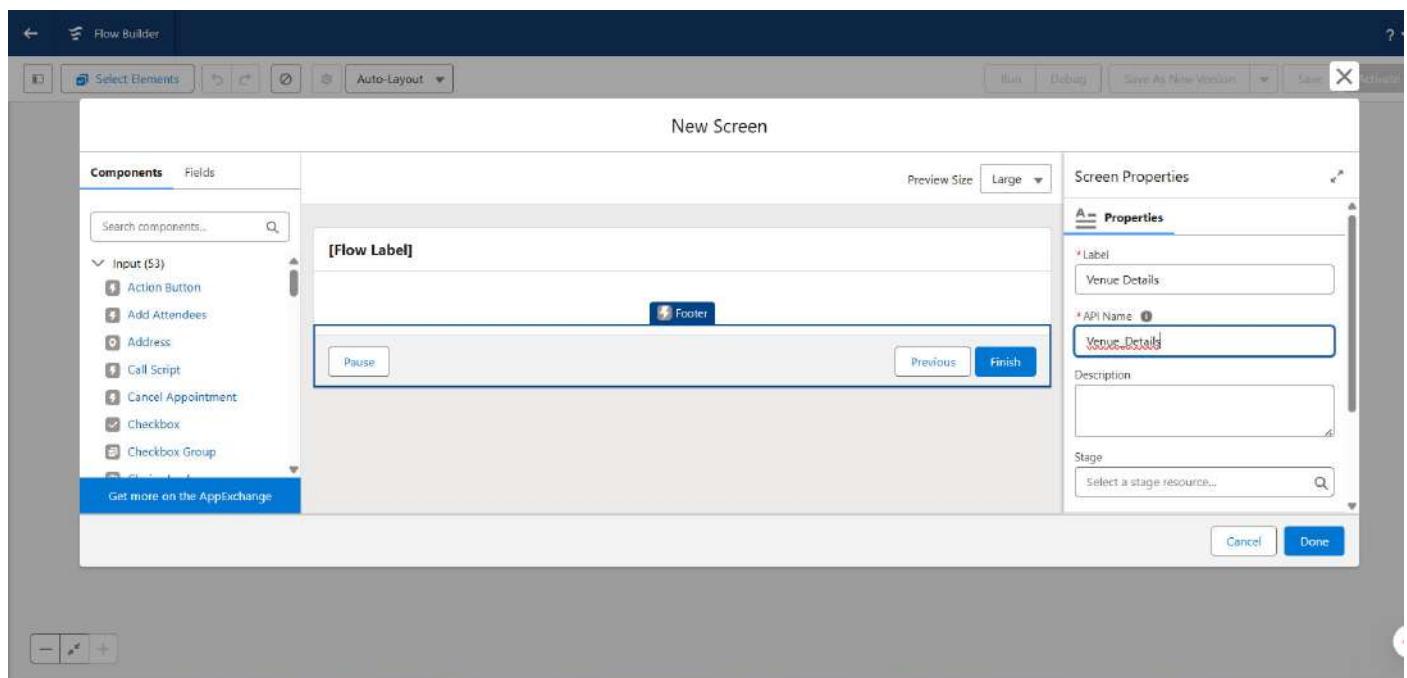
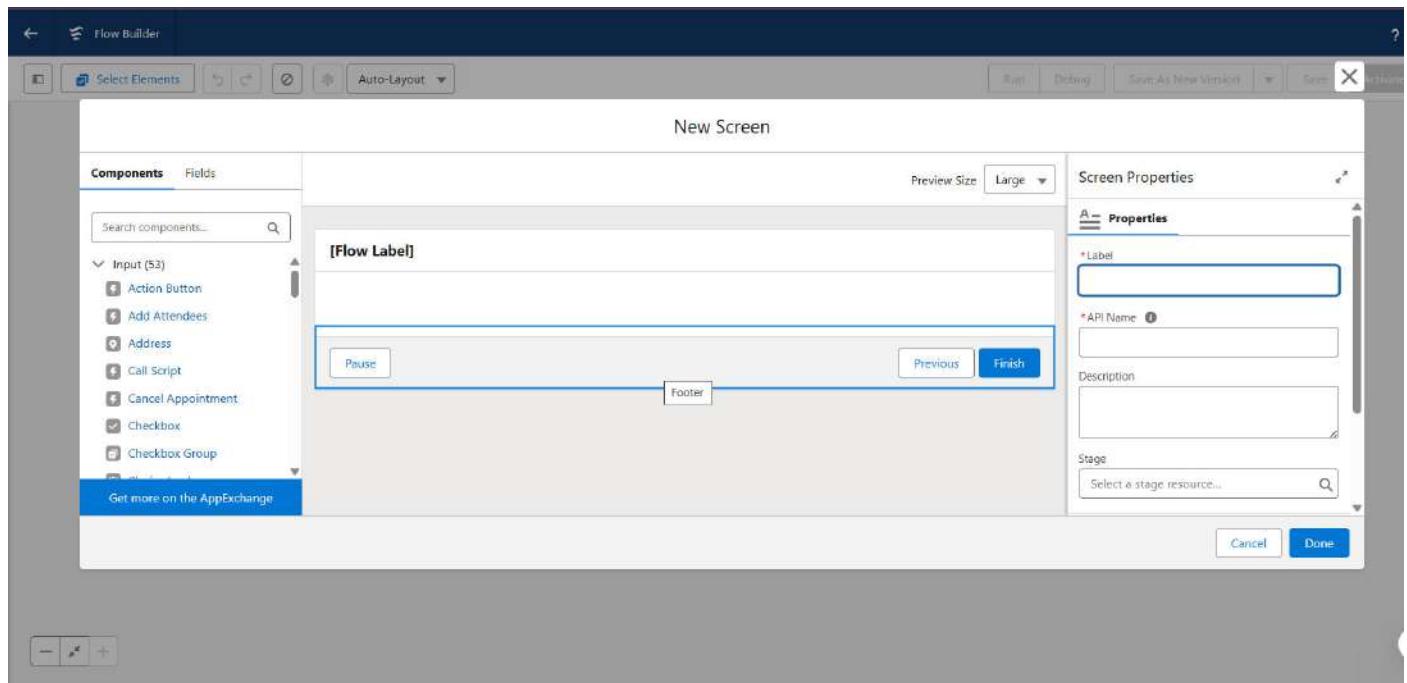
- Screen Flow**  
Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.
- User Provisioning Flow**  
Create a user account and link it to a third-party service or app.
- Salesforce Scheduler Flow**  
Create a new flow for use in Salesforce Scheduler Flow.
- Contact Request Flow**  
Create self-service forms to collect contact details.
- Individual-Object Linking Flow**  
Links contacts, leads, person accounts, or employees to other records in a screen flow.

**Templates (33)**

[Back](#)

Get more on the AppExchange





**New Screen**

**Components Fields**

Preview Size Large ▾

**Screen Properties**

**Properties**

- \*Label
- \*API Name
- Description

Stage

**[Flow Label]**

**Get more on the AppExchange**

**New Screen**

**Components Fields**

Preview Size Large ▾

**Properties**

Label

\*API Name

Require

Read Only

Disabled

**[Flow Label]**

Venue Name

[Text]

**Get more on the AppExchange**

**New Screen**

**Components Fields**

Preview Size Large ▾

**Properties**

\*API Name

\*Label

Email

Disabled

Placeholder Text

Read Only

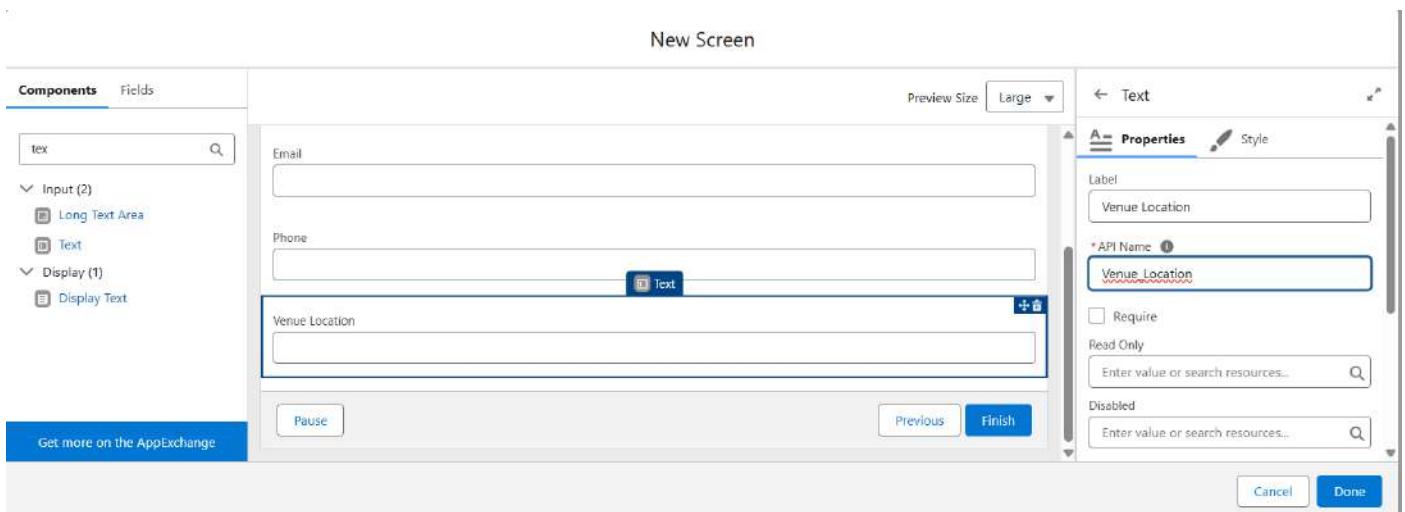
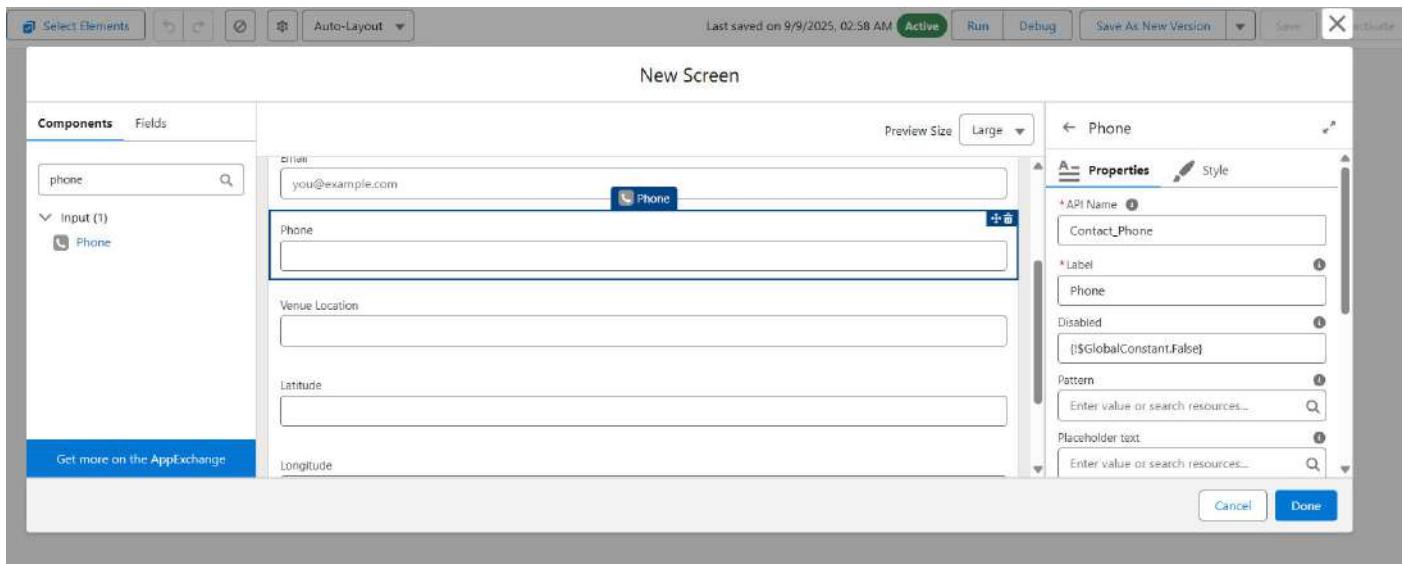
**Venue Form**

Venue Name

Email

Phone

**Get more on the AppExchange**



New Screen

Components Fields

number

Venue Location

Latitude

Longitude

Pause Previous Finish

Get more on the AppExchange

Preview Size Large

Number Properties Style

Label Latitude

\* API Name Latitude

Require

Read Only

Disabled

Cancel Done

Select Elements Auto-Layout

Last saved on 9/9/2025, 02:58 AM Active Run Debug Save As New Version Save X

New Screen

Components Fields

number

Venue Location

Latitude

Longitude

Pause Previous Finish

Get more on the AppExchange

Preview Size Large

Number Properties Style

Label Longitude

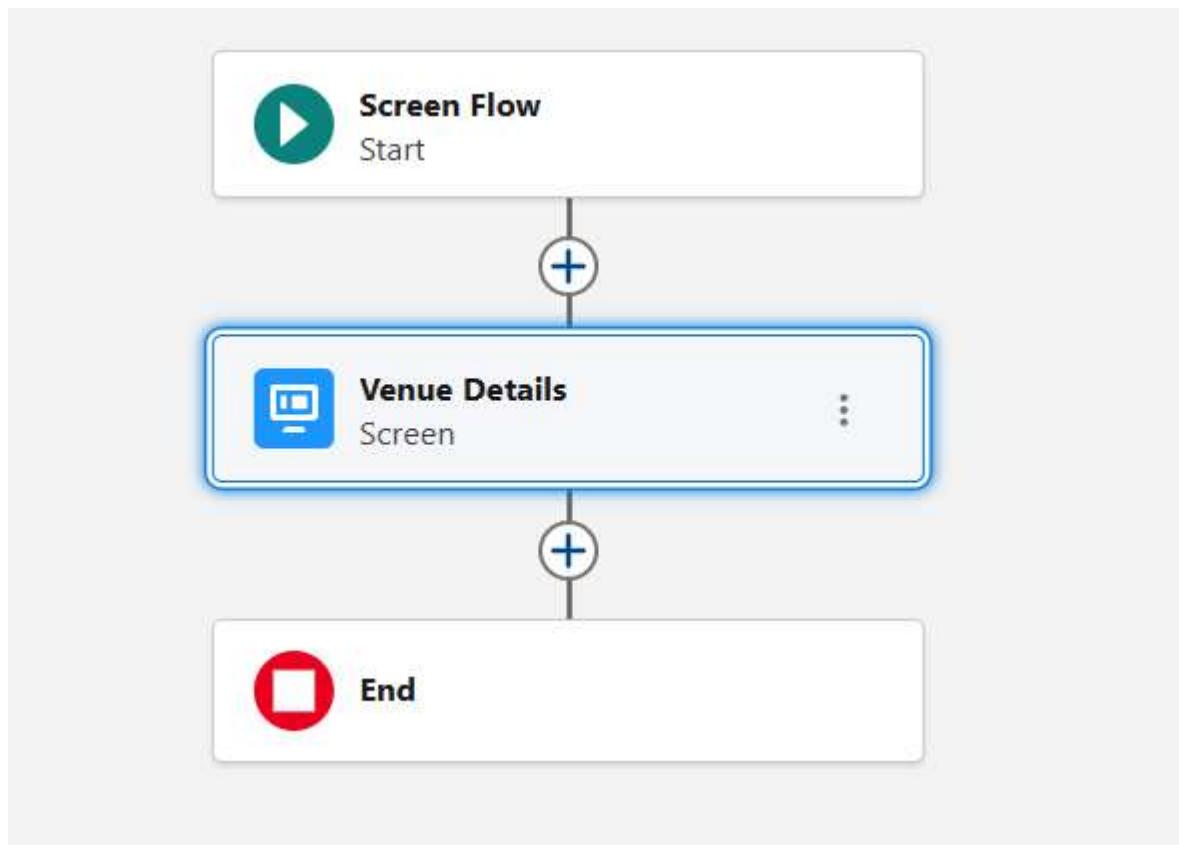
\* API Name Longitude

Require

Read Only

Disabled

Cancel Done





Flow Builder

Venue Form - V1



Select Elements



Auto-Layout ▾

**Screen Flow**

Start

**Venue Details**

Screen

**Add Element**

creat

**Create Records**

Create Customer Co

Create Records: Create Salesforce records using values from the flow.



Create Cart



Create Flow Approval Process



Create Inventory Reservation From Cart



Create Return Order



Create Boost and Bury Rule



## Create Records

\* Label

Create Venue Record

\* API Name i

Create\_Venue\_Record

Description

\* How to set record field values

Manually

### Create a Record of This Object

\* Object

Venue

## Create Records

### Set Field Values for the Venue

Field

A\_a Contact Email X

Value

A\_a Venue Details > Email > Value X



Field

A\_a Contact Phone X

Value

A\_a Venue Details > Phone > Value X



Field

A\_a Venue Name X

Value

A\_a Venue Details > Venue Name X



Field

A\_a Venue Location X

Value

A\_a Venue Details > Venue Location X



Field

# Location (Latitude) X

Value

# Venue Details > Latitude X



Field

# Location (Longitude) X

Value

# Venue Details > Longitude X

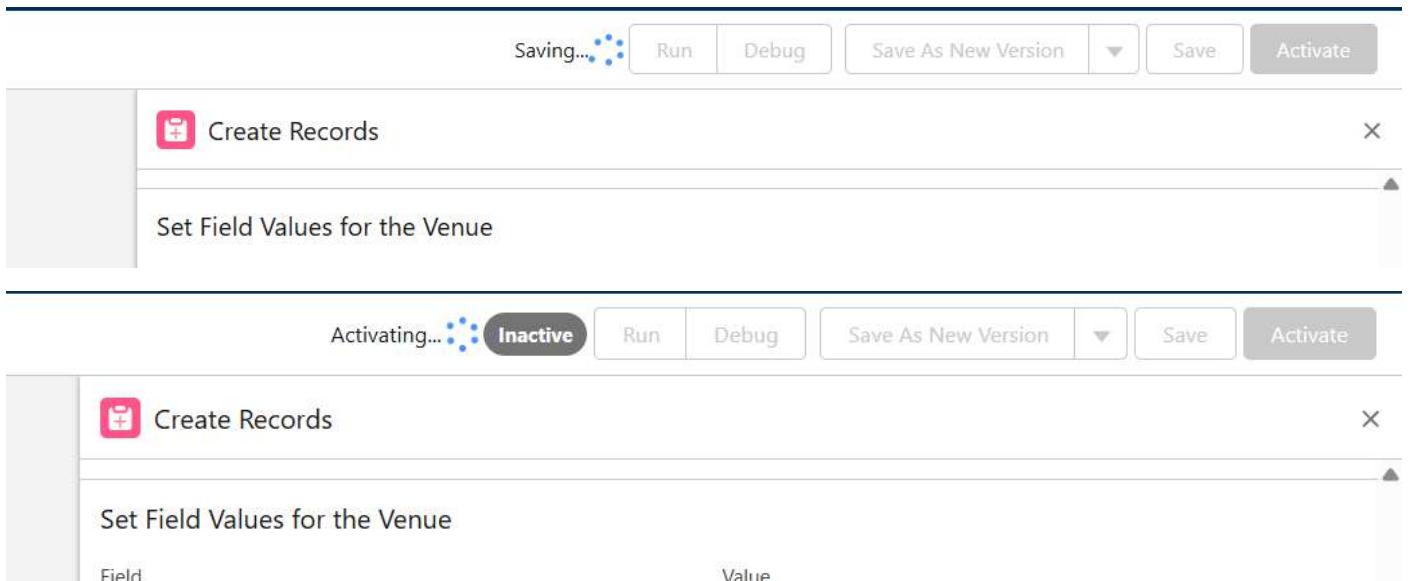
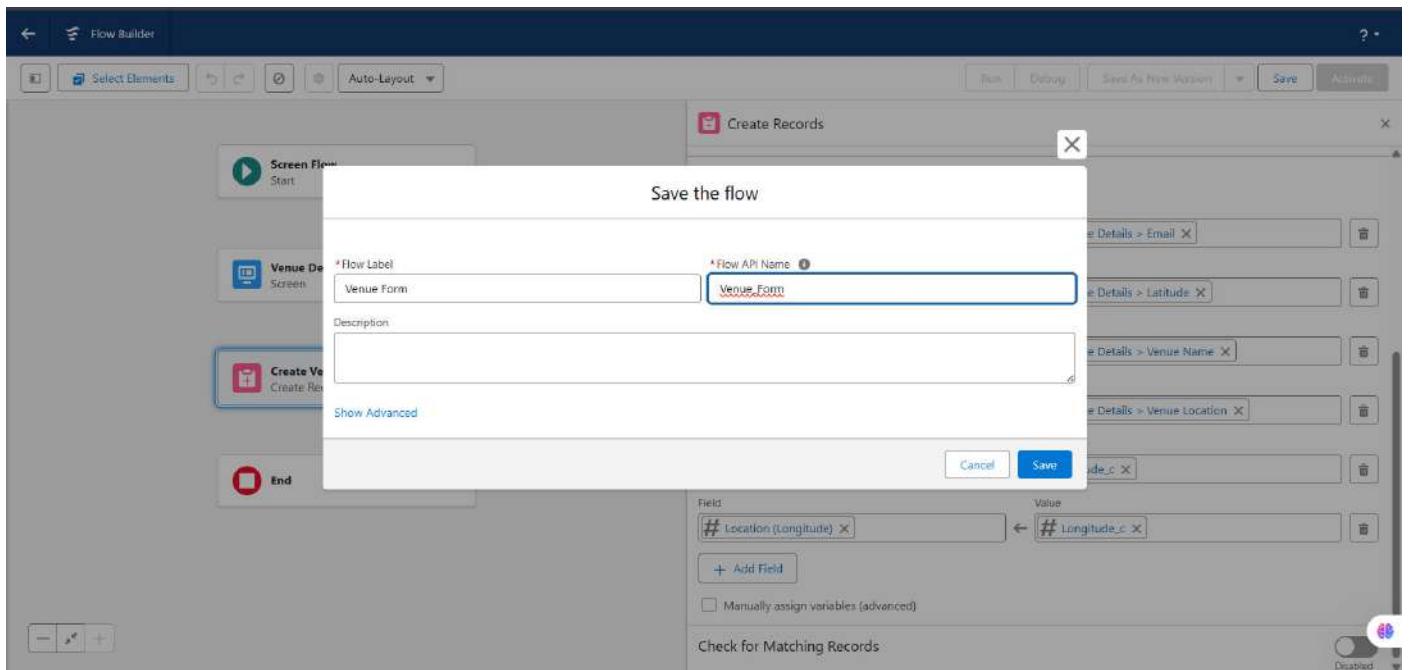


+ Add Field

Manually assign variables (advanced)

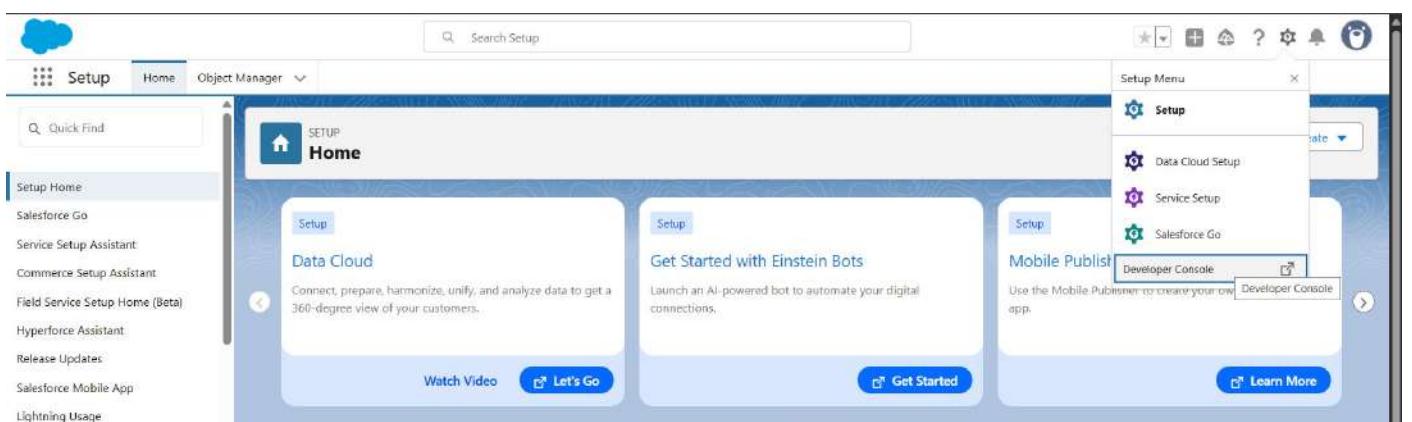
### Check for Matching Records

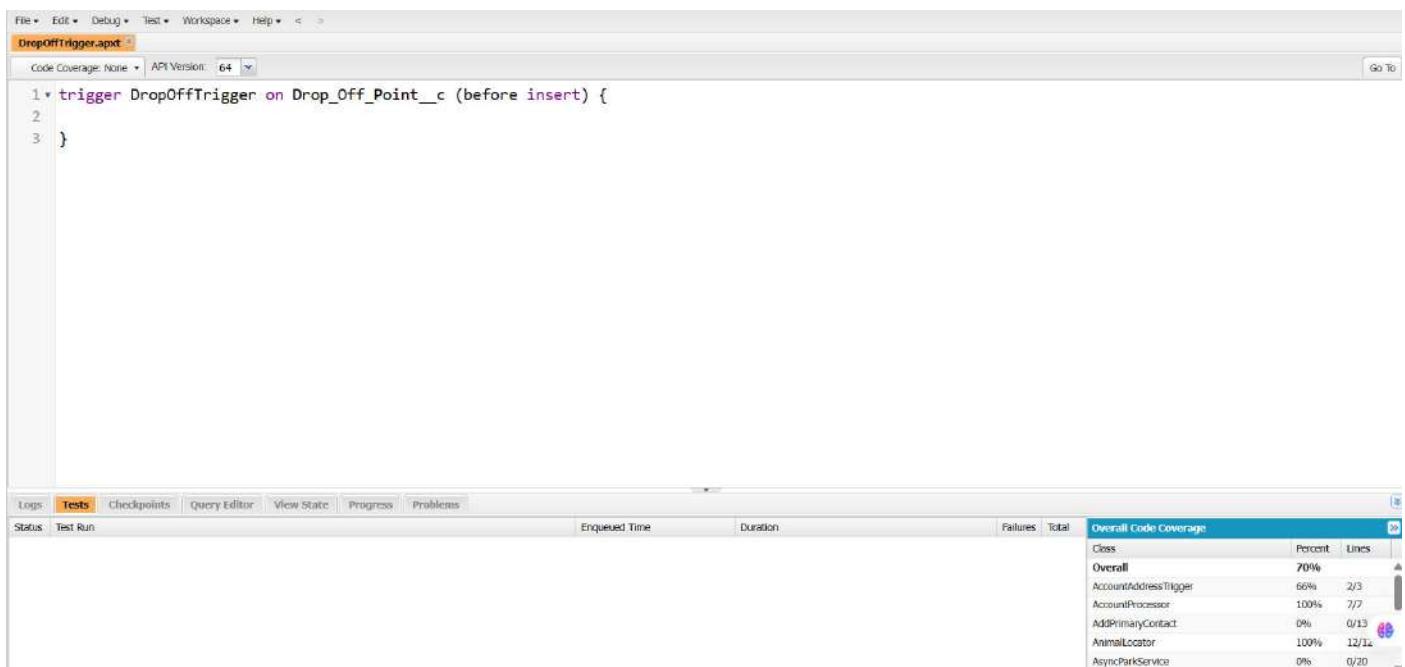
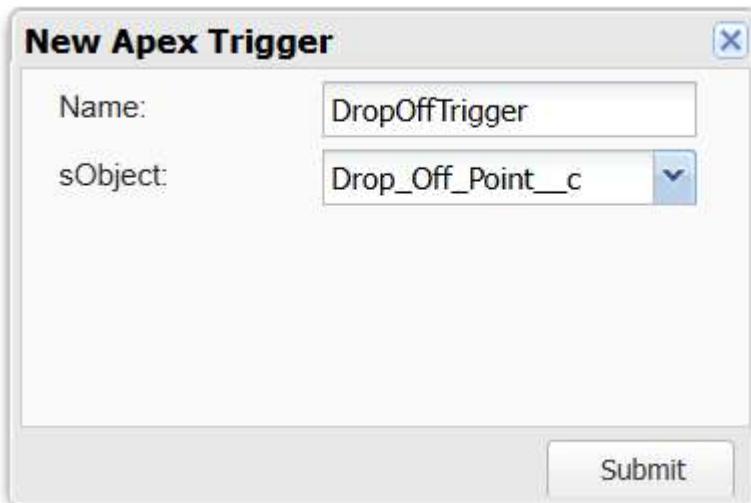
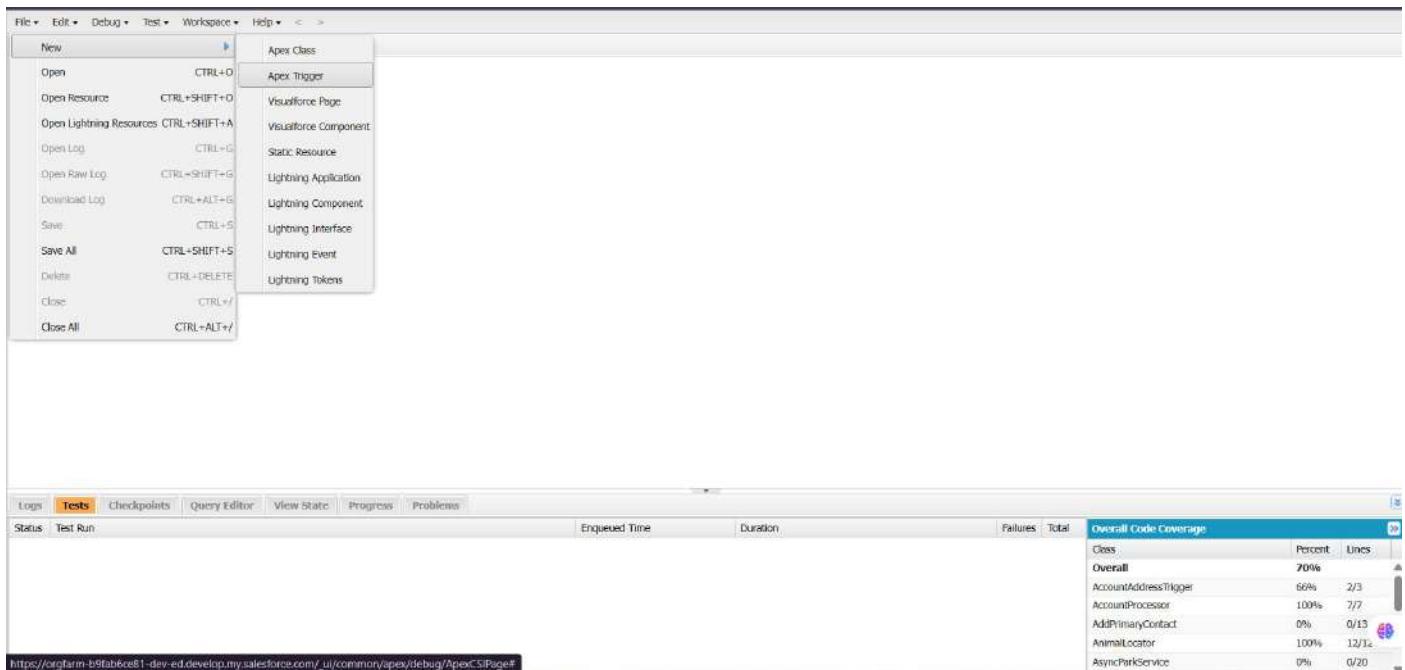




7) Create a trigger in Developer console for Drop-Off Point

a) Trigger Creation





b)Trigger code creation and check

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

### DropOffTrigger.apxt

Code Coverage: None API Version: 64

```
1 trigger DropOffTrigger on Drop_Off_Point__c (before insert) {
2     for(Drop_Off_Point__c Drop : Trigger.new){
3         Drop.Calculated_Distance__c = Drop.distance_calculation__c;
4     }
5 }
```

Logs

Tests

Checkpoints

Query Editor

View State

Progress

Problems

Name

Line

Problem

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

**DropOffTrigger.apxt**

Code Coverage: None API Version: 64

```

1 trigger DropOffTrigger on Drop_Off_Point__c (before insert) {
2     for(Drop_Off_Point__c Drop : Trigger.new){
3         Drop.Calculated_Distance__c = Drop.distance_calculation__c;
4     }
5 }
```

Enqueuing test run... Success

Logs Tests Checkpoints Query Editor View State Progress Problems

Name	Line	Problem

## 8)Create NGO Profile for the food supply

The screenshot shows the Salesforce Setup Home page. The left sidebar has a search bar with "prof" typed in, and the "Profiles" option is selected under the "Users" category. The main content area displays three setup cards: "Data Cloud", "Get Started with Einstein Bots", and "Mobile Publisher". Below these cards is a section titled "Most Recently Used" with a table showing two items: "Calculated Distance" (Custom Field Definition) and "DropOffTrigger" (Apex Trigger). The table has columns for NAME, TYPE, and OBJECT.

NAME	TYPE	OBJECT
Calculated Distance	Custom Field Definition	Drop-Off Point
DropOffTrigger	Apex Trigger	Drop-Off Pair

Setup Home Object Manager

Q prof

Users Profiles

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

## Profiles

### Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard Platform User
User License	Salesforce Platform
Profile Name	<input type="text" value="NGOs Profile"/>

Save Cancel

## Profiles

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

Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

### Profile Detail

Name	NGOs Profile
User License	Salesforce Platform
Description	
Created By	Valentina A, 9/9/2025, 3:32 AM
Modified By	Valentina A, 9/9/2025, 3:32 AM

### Page Layouts

Standard Object Layouts	Global	Location
Email Application	Not Assigned [View Assignment]	Location Group [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Location Group Assignment [View Assignment]
Account	Account Layout [View Assignment]	Object Milestone [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Operating Hours [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Order [View Assignment]
Asset	Asset Layout [View Assignment]	Order Product [View Assignment]
Asset Relationship	Asset Relationship Layout [View Assignment]	Payment [View Assignment]
Assigned Resource	Assigned Resource Layout	Payment Authorization [View Assignment]

9) Create 3 users with different details for the food connect app

a) User 1

The screenshot shows the Salesforce Setup Home page. On the left, the navigation sidebar is open, showing 'Users' selected under 'Setup'. The main content area features three cards: 'Data Cloud' (Connect, prepare, harmonize, unify, and analyze data to get a 360-degree view of your customers), 'Get Started with Einstein Bots' (Launch an AI-powered bot to automate your digital connections), and 'Mobile Publisher' (Use the Mobile Publisher to create your own branded mobile app). Below these cards is a section titled 'Most Recently Used' with a table showing recent items like 'Calculated Distance' and 'DropOffTrigger'.

The screenshot shows the Salesforce Users page. The navigation sidebar is open, showing 'Users' selected under 'Setup'. The main content area is titled 'All Users' and displays a list of existing users. The columns include Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	A. Valitina	val	yatinavalitina17@agentforce.com		✓	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty_00dgj000005lehuau_xcy5qj5vgy@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	EPIC_OrgFarm	CEPIC	epic_493c89febc49@orgfarm.com		✓	System Administrator
<input type="checkbox"/>	User_Integration	integ	integration@00dgj000005lehuau.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00dgj000005lehuau.com		✓	Analytics Cloud Security User

**New User**

**User Edit** Save Save & New Cancel

**General Information** Required Information

First Name	Iksha Foundation	Role	<None Specified>
Last Name	Iksha_Foundation	User License	Salesforce Platform
Alias	iksh	Profile	NGOs Profile
Email	selvikumar@gmail.com	Active	<input checked="" type="checkbox"/>
Username	selvikumar@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User175741400435478737	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	<None>
		Data.com Monthly Addition Limit	Default Limit (300)
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>

**User Detail** Edit Sharing Reset Password Freeze View Summary

Name	Iksha Foundation Iksha_Foundation	Role	Salesforce Platform
Alias	iksh	User License	NGOs Profile
Email	selvikumar@gmail.com (Verify)	Profile	NGOs Profile
Username	selvikumar@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17574140043547873719	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	VIEW
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password Authenticator	<input type="checkbox"/>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator	<input type="checkbox"/>	Salesforce CRM Content User	<input checked="" type="checkbox"/>
Security Key (U2F or WebAuthn)	<input type="checkbox"/>	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>

## b) User 2

SETUP **Users**

New User

User Edit Save Save & New Cancel

General Information Required Information

First Name	NSS	Role	<None Specified>
Last Name	NSS	User License	Salesforce Platform
Alias	nnss	Profile	NGOs Profile
Email	valliraje34@gmail.com	Active	<input checked="" type="checkbox"/>
Username	valliraje34@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User175741414561946575	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	--None--
		Data.com Monthly Addition Limit	Default Limit (300)
		Accessibility Mode (Classic Only)	<input type="checkbox"/> <input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/> <input type="checkbox"/>

SETUP **Users**

NSS NSS

User Edit Save Save & New Cancel

General Information Required Information

First Name	NSS	Role	<None Specified>
Last Name	NSS	User License	Salesforce Platform
Alias	nnss	Profile	NGOs Profile
Email	vallisusan07@gmail.com	Active	<input checked="" type="checkbox"/>
Username	vallisusan07@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User175741422851749865	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	--None--
		Data.com Monthly Addition Limit	300
		Accessibility Mode (Classic Only)	<input type="checkbox"/> <input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/> <input type="checkbox"/>

**SETUP** **Users**

User Detail		<a href="#">Edit</a>	<a href="#">Sharing</a>	<a href="#">Reset Password</a>	<a href="#">Freeze</a>	<a href="#">View Summary</a>
Name	NSS NSS	Role				
Alias	nsss	User License	Salesforce Platform			
Email	vallisusan07@gmail.com <a href="#">[Verify]</a>	Profile	NGOs Profile			
Username	vallisusan07@gmail.com	Active	<input checked="" type="checkbox"/>			
Nickname	User17574142286174986566 <a href="#">[i]</a>	Marketing User	<input type="checkbox"/>			
Title		Offline User	<input type="checkbox"/>			
Company		Knowledge User	<input type="checkbox"/>			
Department		Flow User	<input type="checkbox"/>			
Division		Service Cloud User	<input type="checkbox"/>			
Address		Site.com Contributor User	<input type="checkbox"/>			
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>			
Locale	English (United States)	WDC User	<input type="checkbox"/>			
Language	English	Mobile Push Registrations	<a href="#">View</a>			
Delegated Approver		Data.com User Type	<a href="#">[i]</a>			
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">[i]</a>			
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> <a href="#">[i]</a>			
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> <a href="#">[i]</a>			
App Registration: One-Time Password Authenticator	<a href="#">[i]</a>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> <a href="#">[i]</a>			
App Registration: Salesforce Authenticator	<a href="#">[i]</a>	Salesforce CRM Content User	<input checked="" type="checkbox"/>			
Security Key (U2F or WebAuthn)	<a href="#">[i]</a>	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>			

c)User 3

**SETUP** **Users**

User Edit [Help for this Page](#) [\[?\] \[i\]](#)

### Street Cause Street\_Cause

User Edit		<a href="#">Save</a>	<a href="#">Save &amp; New</a>	<a href="#">Cancel</a>
<b>General Information</b>				
First Name:	Street Cause	Role:	<None Specified>	
Last Name:	Street_Cause	User License:	Salesforce Platform	
Alias:	sstre	Profile:	NGOs Profile	
Email:	valliraj06@gmail.com	Active:	<input checked="" type="checkbox"/>	
Username:	valliraj06@gmail.com	Marketing User:	<input type="checkbox"/>	
Nickname:	User175741436078994040 <a href="#">[i]</a>	Offline User:	<input type="checkbox"/>	
Title:		Knowledge User:	<input type="checkbox"/>	
Company:		Flow User:	<input type="checkbox"/>	
Department:		Service Cloud User:	<input type="checkbox"/>	
Division:		Site.com Contributor User:	<input type="checkbox"/>	
		Site.com Publisher User:	<input type="checkbox"/>	
		WDC User:	<input type="checkbox"/>	
		Data.com User Type:	<a href="#">--None--</a>	
		Data.com Monthly Addition Limit:	<a href="#">300</a>	
		Accessibility Mode (Classic Only):	<input type="checkbox"/> <a href="#">[i]</a>	

**SETUP** Users

User Detail

		<a href="#">Edit</a>	<a href="#">Sharing</a>	<a href="#">Reset Password</a>	<a href="#">Freeze</a>	<a href="#">View Summary</a>
Name	Street Cause Street_Cause	Role				
Alias	sstre	User License	Salesforce Platform			
Email	vaitraj06@gmail.com [Verify] <a href="#">i</a>	Profile	NGOs Profile			
Username	vaitraj06@gmail.com	Active	<input checked="" type="checkbox"/>			
Nickname	User17574143607699464604 <a href="#">i</a>	Marketing User	<input type="checkbox"/>			
Title		Offline User	<input type="checkbox"/>			
Company		Knowledge User	<input type="checkbox"/>			
Department		Flow User	<input type="checkbox"/>			
Division		Service Cloud User	<input type="checkbox"/>			
Address		Site.com Contributor User	<input type="checkbox"/>			
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>			
Locale	English (United States)	WDC User	<input type="checkbox"/>			
Language	English	Mobile Push Registrations	<a href="#">View</a>			
Delegated Approver		Data.com User Type	<a href="#">i</a>			
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">i</a>			
Receive Approval Request Emails	Only If I am an approver	Debug Mode	<input type="checkbox"/> <a href="#">i</a>			
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> <a href="#">i</a>			
App Registration: One-Time Password Authenticator	<a href="#">i</a>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> <a href="#">i</a>			
App Registration: Salesforce Authenticator	<a href="#">i</a>	Salesforce CRM Content User	<input checked="" type="checkbox"/>			
Security Key (U2F or WebAuthn)	<a href="#">i</a>	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>			

10) Create 3 different public groups for all the 3 users seperately

a) User 1 Public group

**SETUP** Public Groups

Q\_ Public

- Users
- Public Groups**
- Feature Settings
- Salesforce Files
  - Content Deliveries and **Public Links**
- Company Settings
- Calendar Settings
  - Public Calendars and Resources**

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

<https://orgfarm-b9bb6cc81-dev-ed.develop.lightning.force.com/lightning/setup/PublicGroups/home>

**SETUP** Public Groups

New Group

Group Information Save Cancel

New Public Group

Label:  \* = Required Information

Group Name:  \*

Grant Access Using Hierarchies

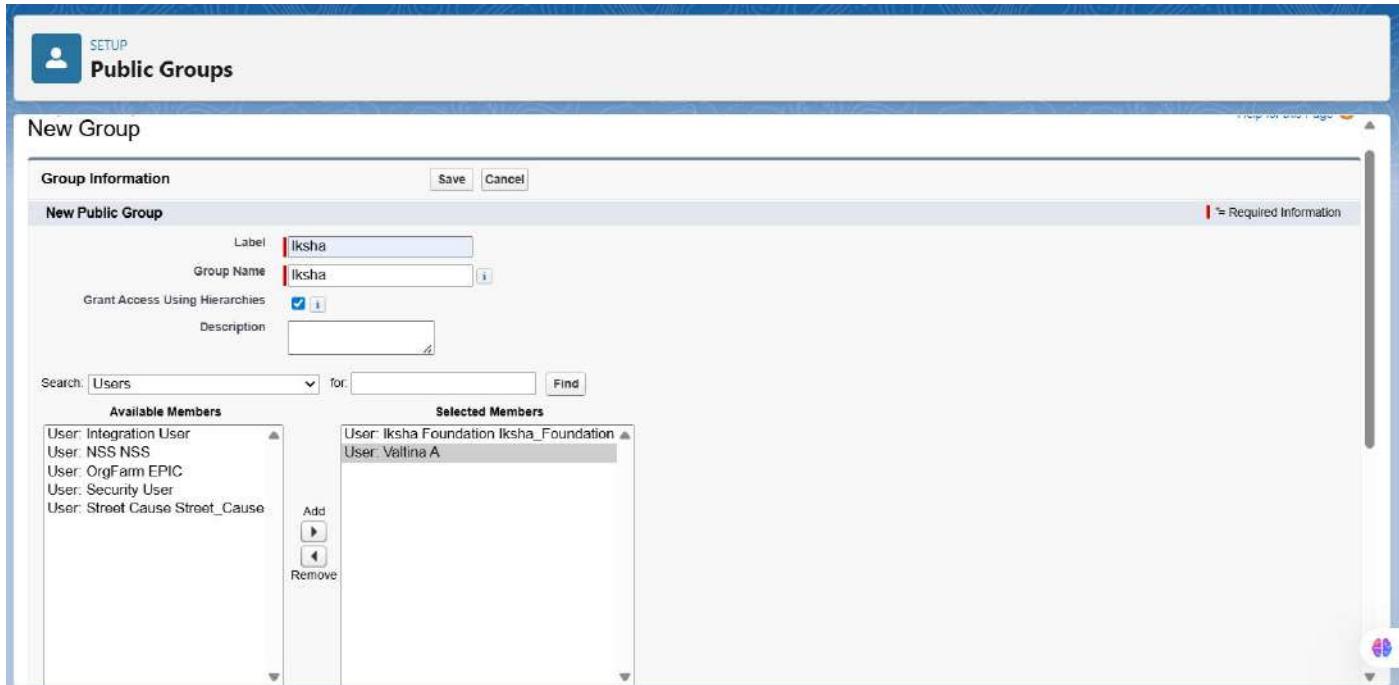
Description:

Search:  for:  Find

**Available Members** **Selected Members**

Available Members	Selected Members
User: Integration User	User: Iksha Foundation Iksha_Foundation
User: NSS NSS	User: Valtina A
User: OrgFarm EPIC	
User: Security User	
User: Street Cause Street_Cause	

Add Remove



b) User 2 Public group

**SETUP** Public Groups

New Group

Group Information Save Cancel

New Public Group

Label:  \* = Required Information

Group Name:  \*

Grant Access Using Hierarchies

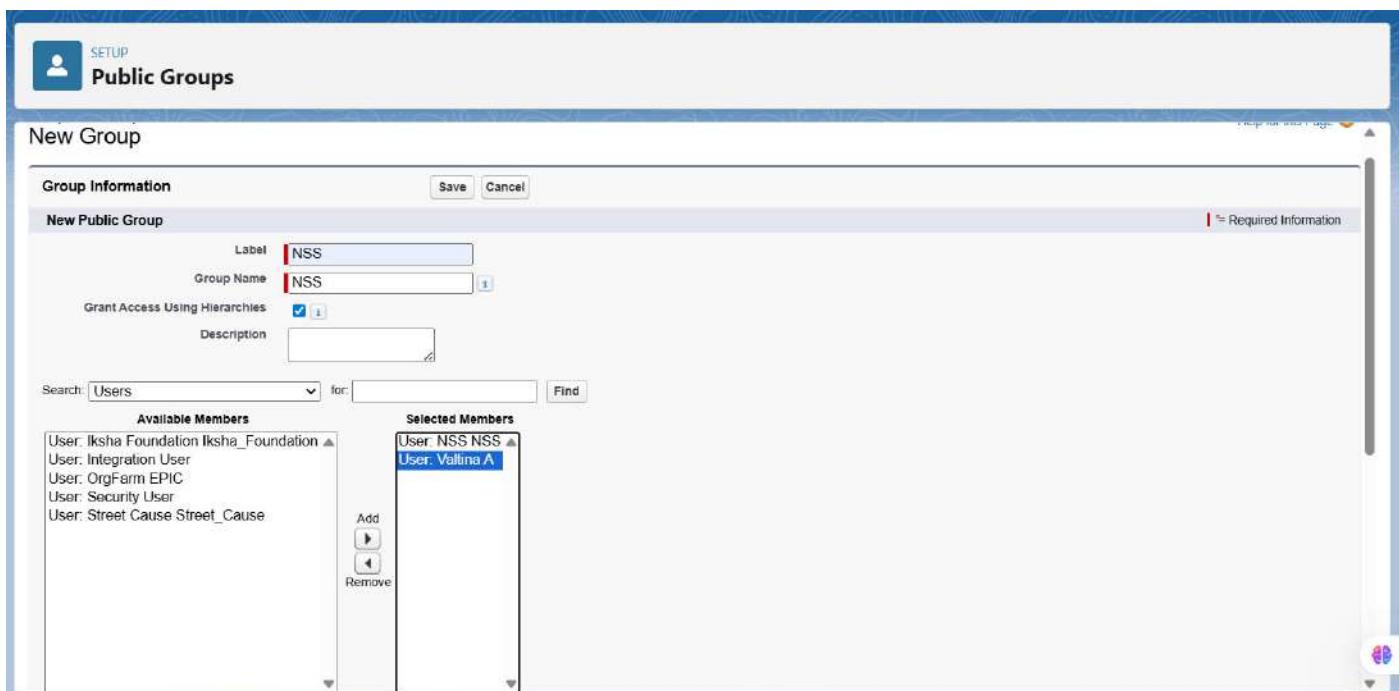
Description:

Search:  for:  Find

**Available Members** **Selected Members**

Available Members	Selected Members
User: Iksha Foundation Iksha_Foundation	User: NSS NSS
User: Integration User	User: Valtina A
User: OrgFarm EPIC	
User: Security User	
User: Street Cause Street_Cause	

Add Remove



### c) User 3 Public group

The screenshot shows the 'Public Groups' setup page. A new group is being created with the following details:

- Label:** Street Cause
- Group Name:** Street\_Cause
- Grant Access Using Hierarchies:** Checked
- Description:** (Empty)

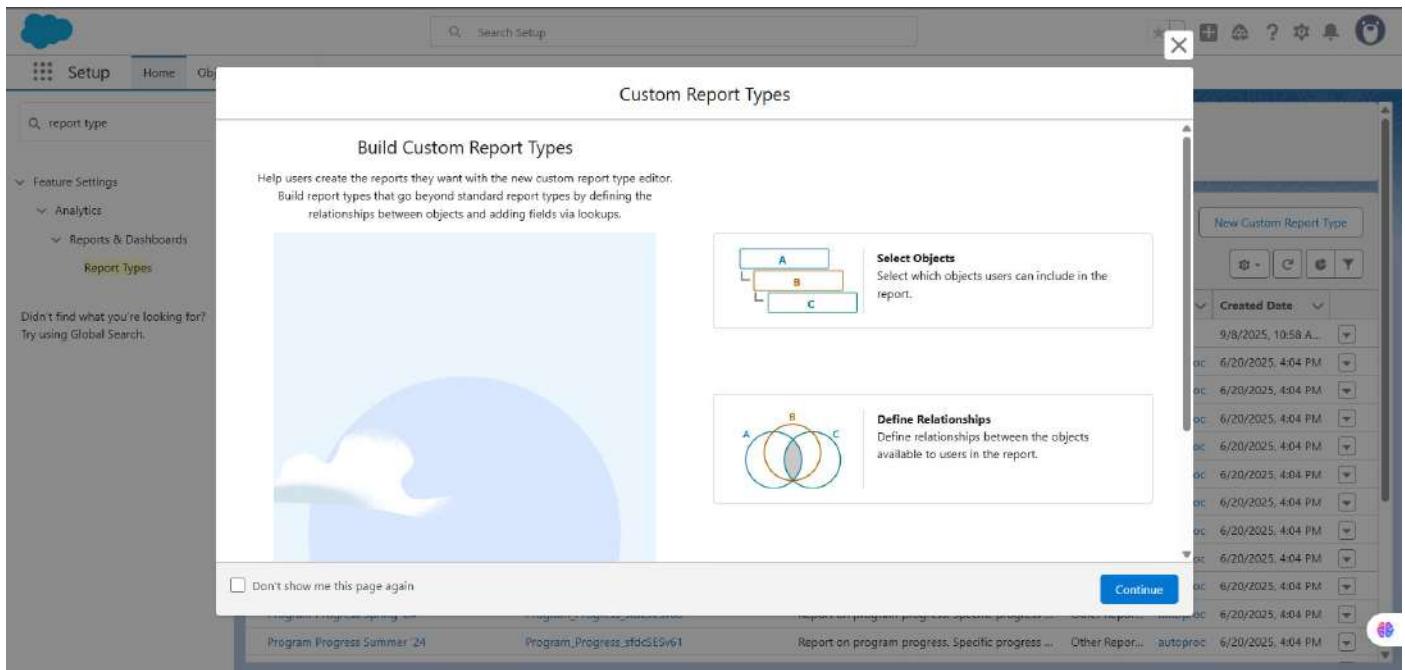
The 'Available Members' list includes several users: Iksha Foundation, Iksha\_Foundation, Integration User, NSS, OrgFarm EPIC, and Security User. The 'Selected Members' list contains two users: Street Cause and Street\_Cause, and User: Vallina A.

The screenshot shows the 'Public Groups' list view. Three groups are listed:

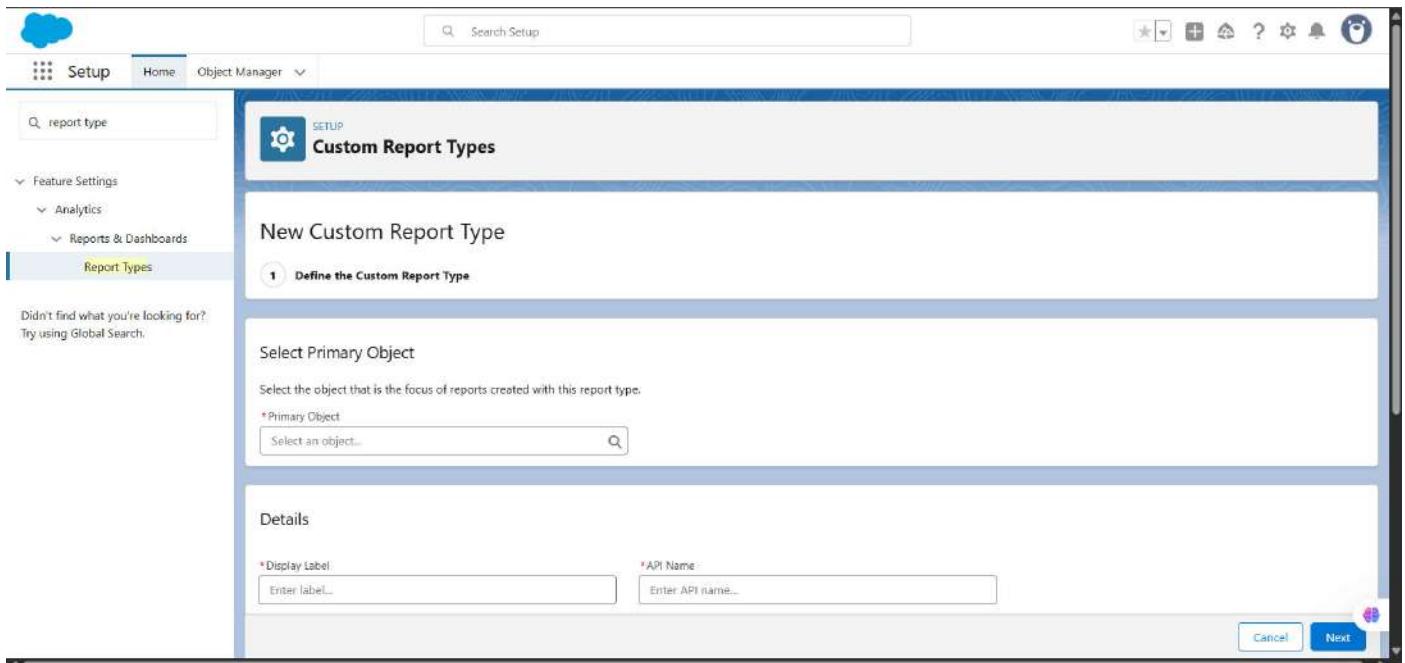
Action	Label	Group Name	Created By	Created Date
Edit   Del	Iksha	Iksha	A. Vallina	9/9/2025, 3:45 AM
Edit   Del	NSS	NSS	A. Vallina	9/9/2025, 3:47 AM
Edit   Del	Street Cause	Street_Cause	A. Vallina	9/9/2025, 3:48 AM

### 11) Create different new custom Report types

The screenshot shows the 'Report Types' section under 'Analytics' in the 'Reports & Dashboards' category. The search bar at the top contains 'report type'. The sidebar on the left has sections for Feature Settings, Analytics, and Reports & Dashboards, with 'Report Types' currently selected. A message at the bottom says ' Didn't find what you're looking for? Try using Global Search.'.



a) Venue with DropOff with Volunteer-Custom Report Type



Cloud icon

Setup Home Object Manager

Search Setup

Custom Report Types

New Custom Report Type

1 Define the Custom Report Type

Select Primary Object

Select the object that is the focus of reports created with this report type.

\*Primary Object

Venues

Identity Event Logs  
API Name: IdEventLog

Venues  
API Name: Venue\_c

Voice Channel Interaction Detail Events  
API Name: VoiceChnlInteractionDetailEvent

Voice Channel Interaction Events  
API Name: VoiceChnlInteractionEvent

\*API Name

Enter API name...

Cancel Next

This screenshot shows the 'Custom Report Types' setup page. On the left, there's a sidebar with 'Report type' selected under 'Report Types'. The main area is titled 'New Custom Report Type' and '1 Define the Custom Report Type'. It asks to 'Select Primary Object' and provides a search bar with 'ven' typed in. A dropdown menu lists 'Identity Event Logs' (API Name: IdEventLog), 'Venues' (API Name: Venue\_c), 'Voice Channel Interaction Detail Events' (API Name: VoiceChnlInteractionDetailEvent), and 'Voice Channel Interaction Events' (API Name: VoiceChnlInteractionEvent). The 'Venues' option is highlighted. Below the dropdown is a field labeled '\*API Name' with 'Enter API name...' placeholder text. At the bottom right are 'Cancel' and 'Next' buttons.

New Custom Report Type

1 Define the Custom Report Type

Select Primary Object

Select the object that is the focus of reports created with this report type.

\*Primary Object

Venues

Details

\*Display Label

Venue with DropOff with Volunteer

\*API Name

Venue\_with\_DropOff\_with\_Volunteer

\*Description

Venue with DropOff with Volunteer

Note: Description will be visible to users who create reports.

Cancel Next

This screenshot shows the 'New Custom Report Type' configuration page. It has a header 'New Custom Report Type' and a step indicator '1 Define the Custom Report Type'. The 'Select Primary Object' section is shown again. Below it is a 'Details' section with fields for 'Display Label' (containing 'Venue with DropOff with Volunteer') and 'API Name' (containing 'Venue\_with\_DropOff\_with\_Volunteer'). There's also a 'Description' field with the same text. A note at the bottom says 'Note: Description will be visible to users who create reports.' At the bottom right are 'Cancel' and 'Next' buttons.

### Details

\* Display Label: Venue with DropOff with Volunteer      \* API Name: Venue\_with\_DropOff\_with\_Volunteer

\* Description: Venue with DropOff with Volunteer

Note: Description will be visible to users who create reports.

\* Store in Category: Other Reports     

**Set Availability**

An in-development report type is visible only to users with the Manage Custom Report Types permission. A deployed report type is available to all users.

Status:

- In Development
- Deployed

### 2 Define Report Records Set

Select related objects to define which records are included in reports using this report type.

**A Drop-Off Points** Primary Object

**B Volunteers**

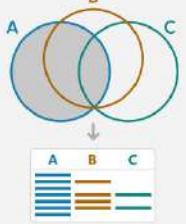
A to B Relationship:

- Each "A" record must have at least one related "B" record.
- "A" records may or may not have related "B" records.

**C Execution Details**

B to C Relationship:

- Each "B" record must have at least one related "C" record.
- "B" records may or may not have related "C" records.





SETUP

## Custom Report Types

## Venue with DropOff with Volunteer

[Preview Layout](#)[Edit Layout](#)[Clone](#)[Delete](#)[Close](#)

Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type.

## Details



<b>Display Label</b>	Venue with DropOff with Volunteer
<b>API Name</b>	Venue_with_DropOff_with_Volunteer
<b>Description</b>	Venue with DropOff with Volunteer
<b>Created By</b>	Valtina A, 9/9/25, 4:26 PM
<b>Store in Category</b>	other
<b>Deployment ...</b>	Deployed
<b>Modified By</b>	Valtina A, 9/9/25, 4:26 PM

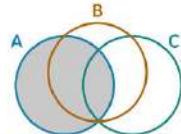
## Object Relationships



## Venues (A)

... with or without related records from Drop-Off Points (B)

... with or without related records from Volunteers (C)



## Details



<b>Display Label</b>	Venue with DropOff with Volunteer
<b>API Name</b>	Venue_with_DropOff_with_Volunteer
<b>Description</b>	Venue with DropOff with Volunteer
<b>Created By</b>	Valtina A, 9/9/25, 4:26 PM
<b>Store in Category</b>	other
<b>Deployment ...</b>	Deployed
<b>Modified By</b>	Valtina A, 9/9/25, 4:26 PM

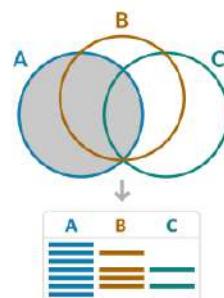
## Object Relationships



## Venues (A)

... with or without related records from Drop-Off Points (B)

... with or without related records from Volunteers (C)



## Fields

Source Object	Included Fields
Venues	13
Drop-Off Points	13
Volunteers	15

## b) Volunteer with Execution Details and Tasks-Custom Report type

The screenshot shows the Salesforce Setup interface. The left sidebar is collapsed, and the main area displays the "Custom Report Types" list under the "All Custom Report Types" tab. The list includes 14 items, each with a label, name, description, category, creation date, and last modified date. The "Report.Types" item is highlighted in yellow.

Label	Name	Description	Category	Created Date
Drop-Off Points with Volunteers with Execution Details and Tasks	Drop_Off_Points_with_Volunteers_with_Execution... Drop-Off Points with Volunteers with Execution ...	Drop-Off Points with Volunteers with Execution ...	Other Repor...	9/8/2025, 10:58 A...
Orchestration Run Logs Spring '24	lflow_orchestration_log_oottb_crt_two_four_eight	Find out which orchestration run logs were crea...	Other Repor...	autoproc 6/20/2025, 4:04 PM
Orchestration Runs Spring '24	lflow_orchestration_run_oottb_crt_two_four_eight	Find out which orchestration runs were created.	Other Repor...	autoproc 6/20/2025, 4:04 PM
Orchestration Stage Runs Spring '24	lflow_orchestration_stage_run_oottb_crt_two_fou...	Find out which orchestration stage runs were cr...	Other Repor...	autoproc 6/20/2025, 4:04 PM
Orchestration Step Runs Spring '24	lflow_orchestration_step_run_oottb_crt_two_fou...	Find out which orchestration step runs were cre...	Other Repor...	autoproc 6/20/2025, 4:04 PM
Orchestration Work Items Spring '24	lflow_orchestration_work_item_oottb_crt_two_fou...	Find out which orchestration work items were c...	Other Repor...	autoproc 6/20/2025, 4:04 PM
Program Definition Spring '24	Program_Definition_sfdcSESV60	Review your analytics with a program-like struct...	Other Repor...	autoproc 6/20/2025, 4:04 PM
Program Definition Summer '24	Program_Definition_sfdcSESV61	Review your analytics with a program-like struct...	Other Repor...	autoproc 6/20/2025, 4:04 PM
Program Item Progress Spring '24	Program_Task_Progress_sfdcSESV60	Report on tasks like exercises, milestones, and o...	Other Repor...	autoproc 6/20/2025, 4:04 PM
Program Item Progress Summer '24	Program_Task_Progress_sfdcSESV61	Report on tasks like exercises, milestones, and o...	Other Repor...	autoproc 6/20/2025, 4:04 PM
Program Progress Spring '24	Program_Progress_sfdcSESV60	Report on program progress. Specific progress ...	Other Repor...	autoproc 6/20/2025, 4:04 PM
Program Progress Summer '24	Program_Progress_sfdcSESV61	Report on program progress. Specific progress ...	Other Repor...	autoproc 6/20/2025, 4:04 PM

The screenshot shows the "New Custom Report Type" wizard, Step 1: Define the Custom Report Type. The "Select Primary Object" section is active, showing a search bar with "Volunteers" entered. The "Details" section shows the display label "Volunteers with Execution Details and Tasks" and the API name "Volunteers\_with\_Execution\_Details\_and\_Tasks".

Setup Home Object Manager

report

Feature Settings

- Analytics
- Reports & Dashboards
  - Access Policies
  - Historical Trending
  - Report Types
  - Reporting Snapshots
  - Reports and Dashboards
  - Settings

Security

Guest User Sharing Rule Access Report

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

Details

\*Display Label: Volunteers with Execution Details and Tasks.

\*API Name: Volunteers\_with\_Execution\_Details\_and\_Tasks

\*Description: Volunteers with Execution Details and Tasks.

Note: Description will be visible to users who create reports.

\*Store in Category: Other Reports

Status

In Development

Deployed

Cancel Next

This screenshot shows the 'Report Types' setup page. The 'Display Label' field contains 'Volunteers with Execution Details and Tasks.' and the 'API Name' field contains 'Volunteers\_with\_Execution\_Details\_and\_Tasks.' The 'Status' section has 'Deployed' selected. A success message at the top right says 'Report type Volunteers with Execution Details and Tasks. was created.'

Setup Home Object Manager

report

Feature Settings

- Analytics
- Reports & Dashboards
  - Access Policies
  - Historical Trending
  - Report Types
  - Reporting Snapshots
  - Reports and Dashboards
  - Settings

Security

Guest User Sharing Rule Access Report

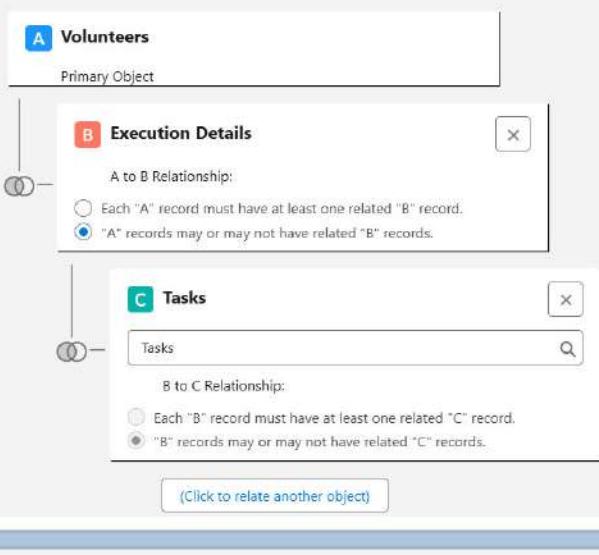
Didn't find what you're looking for? Try using Global Search.

SETUP Custom Report Types

✓ Report type Volunteers with Execution Details and Tasks. was created. X

This screenshot shows the 'Report Types' setup page after a report has been created. A green success message at the top center states '✓ Report type Volunteers with Execution Details and Tasks. was created.' The rest of the page is identical to the previous screenshot, showing the report configuration details.

Select related objects to define which records are included in reports using this report type.



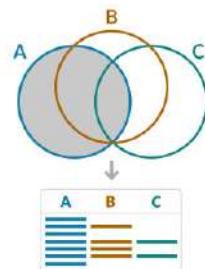
[Cancel](#) [Save](#)

#### Details

<b>Display Label</b>	Volunteers with Execution Details and Tasks
<b>API Name</b>	Volunteers_with_Execution_Details_and_Tasks
<b>Description</b>	Volunteers with Execution Details and Tasks
<b>Created By</b>	Valtina A, 9/9/25, 10:36 PM
<b>Store in Category</b>	other
<b>Deployment Status</b>	Deployed
<b>Modified By</b>	Valtina A, 9/13/25, 2:06 PM

#### Object Relationships

Volunteers (A)  
with or without related records from Execution Details (B)  
with or without related records from Tasks (C)



#### Fields

Source Object	Included Fields
Volunteers	16
Execution Details	9
Tasks	0

12) Now create two reports using the two report types created

The screenshot shows the FoodConnect interface with the 'Reports' tab selected. On the left, a sidebar lists categories: Recent, Created by Me, Private Reports, Public Reports, All Reports, FOLDERS, All Folders, Created by Me, Shared with Me, FAVORITES, and All Favorites. The main area displays a table of recent reports. One report is visible: 'Sample Flow Report: Screen Flows' (Created by Me), which describes "Which flows run, what's the status of each interview, and how long do users take to complete the screens?". The table columns include Report Name, Description, Folder, Created By, Created On, and Subscribed.

The screenshot shows the same FoodConnect interface as above, but with a modal dialog box overlaid. The dialog is titled 'Create folder' and contains fields for 'Folder Label' (set to 'Custom Reports') and 'Folder Unique Name' (set to 'CustomReports'). At the bottom of the dialog are 'Cancel' and 'Save' buttons. The background of the interface is dimmed to indicate the modal is active.

Reports

All Folders > Custom Reports

0 items

RECENT

- Recent
- Created by Me
- Private Reports
- Public Reports
- All Reports

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

Nothing here yet  
This folder is empty.

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

Create Report

Category

- Recently Used
- All
- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and Orders
- Price Books, Products and Assets
- Administrative Reports
- File and Content Reports
- Individuals

Select a Report Type

Showing results for venue with

Report Type Name	Category
Venue with DropOff with Volunteer	Custom

Create Report

Category

- Recently Used
- All
- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and Orders
- Price Books, Products and Assets
- Administrative Reports
- File and Content Reports
- Individuals

Select a Report Type

Showing results for venue with

Report Type Name	Category
Venue with DropOff with Volunteer	Custom

Details

**Venue with DropOff with Volunteer**  
Custom Report Type

Start Report

Details Fields (41)

Description  
Venue with DropOff with Volunteer

Created By You  
No Reports Yet

Created By Others  
No Reports Yet

Objects Used in Report Type

FoodConnect Home Venues Tasks Drop-Off Points Execution Details Volunteers Reports Dashboards

REPORT ▾ New Report / Venue with DropOff with Volunteer

Fields > Outline Filters 2

To see the latest edits, refresh the preview. Refresh

Venue Name Drop-Off Point Name Volunteer Name

No records returned in preview. Try running the report or editing report filters.

- Show All venues
- Set the Created Date filter to All Time
- Edit other filters in the filter panel

Update Preview Automatically

GROUP ROWS Add group...

Volunteer Name

GROUP COLUMNS Add group...

Columns Add column...

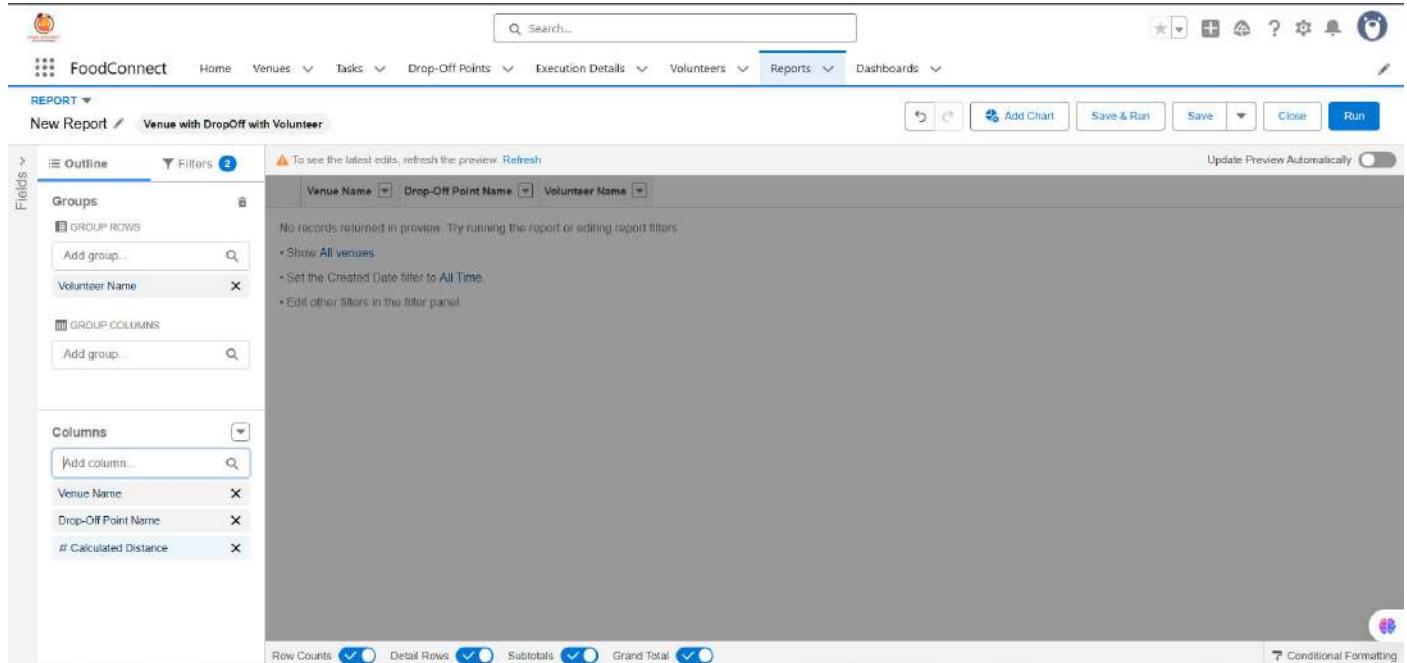
Venue Name

Drop-Off Point Name

# Calculated Distance

Row Counts  Detail Rows  Subtotals  Grand Total

Conditional Formatting



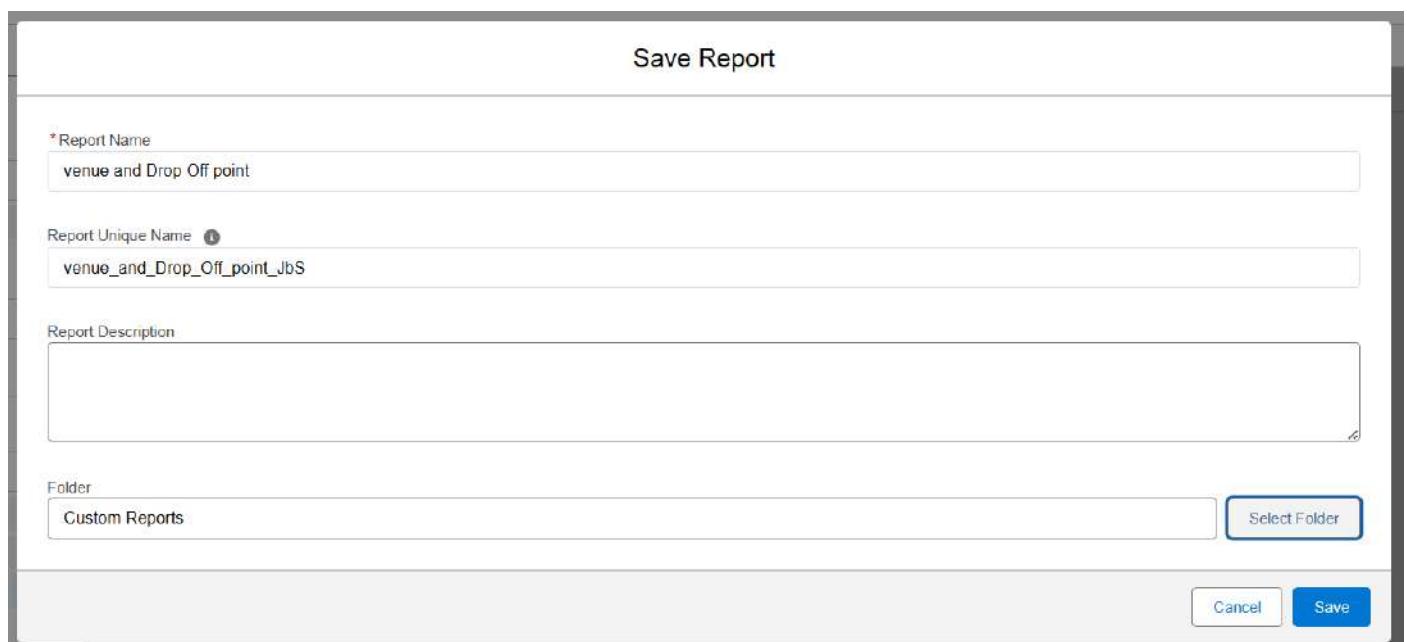
### Save Report

\* Report Name  
venue and Drop Off point

Report Unique Name   
venue\_and\_Drop\_Off\_point\_JbS

Report Description

Folder  
Custom Reports



The screenshot shows the FoodConnect application interface. The top navigation bar includes links for Home, Venues, Tasks, Drop-Off Points, Execution Details, Volunteers, Reports, and Dashboards. The Reports section is active. On the left, a sidebar lists categories like Reports, Folders, and Favorites. The main content area displays a table of reports, with one entry visible: "venue and Drop Off point" under "Custom Reports" created by Valentina A on 9/9/2025, 6:52 AM.

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

The screenshot shows the "Create Report" dialog. The left sidebar shows report categories like Recently Used, All, Accounts & Contacts, Opportunities, etc. The main area is titled "Select a Report Type" and shows a search bar with "vol". Below it, a list of report types is displayed:

Report Type Name	Category
Activities with Volunteers	Standard
Drop-Off Points with Volunteers	Standard
Tasks with Execution Details and Volunteers	Standard
Volunteer History	Standard
<b>Volunteers with Execution Details and Tasks</b>	Custom
Drop-Off Points with Volunteers with Execution Details	Custom

To the right, a "Details" panel shows the selected report type: "Volunteers with Execution Detail..." (Custom Report Type). It includes a "Start Report" button, a "Fields (45)" section, a "Description" section (Volunteers with Execution Details and Tasks), a "Created By You" section (No Reports Yet), a "Created By Others" section (No Reports Yet), and a "Objects Used in Report Type" section (empty).

### Save Report

\* Report Name  
Volunteer Task

Report Unique Name ⓘ  
Volunteer\_Task\_NCe

Report Description

Folder  
Custom Reports Select Folder

Cancel Save

 FoodConnect Home Venues Tasks Drop-Off Points Execution Details Volunteers Reports Dashboards

REPORT Volunteer Task / Volunteers with Execution Details and Tasks

Fields > Outline Filters 1 Previewing a limited number of records. Run the report to see everything.

Groups GROUP ROWS Add group... Volunteer ID GROUP COLUMNS Add group... X

Columns Add column... Volunteer Name Execution Detail Name Task Name Owner: Full Name Rating Created Date X

No records returned in preview. Try running the report or editing report filters.  
 • Set the Available On filter to All Time.  
 • Edit other filters in the filter panel.

Update Preview Automatically

Row Counts  Detail Rows  Subtotals  Grand Total

Add Chart Save & Run Save Close Run

 FoodConnect Home Venues Tasks Drop-Off Points Execution Details Volunteers Reports Dashboards

Reports Recent 2 items

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	venue and Drop Off point		Custom Reports	Valtina A	9/9/2025, 11:01 AM	<input type="checkbox"/>
Created by Me	Volunteer Task		Custom Reports	Valtina A	9/9/2025, 10:12 AM	<input type="checkbox"/>
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

Search recent reports... New Report New Folder X

<https://orgfarm-b9fab6ee81-dev-ed.lightning.force.com/lightning/o/Report/home>

Report: Drop-Off Points with Volunteers with Execution Details  
venue and Drop Off point

	Volunteer Name	Drop-Off Point Name	Execution Detail Name	Venue: Venue Name
<input type="checkbox"/> Susailan (1)	Susailan	karakudi ashram	lunch share	karakudi Park
<b>Subtotal</b>				
<input type="checkbox"/> susi (1)	susi	thirupathur church	snack share	karakudi Park
<b>Subtotal</b>				
<b>Total (2)</b>				

Report: Volunteers with Execution Details and Tasks  
Volunteer Task

	Volunteer ID	Volunteer Name	Execution Detail Name
<input type="checkbox"/> 3 (1)	3	Susailan	lunch share
<b>Subtotal</b>			
<input type="checkbox"/> 4 (1)	4	susi	snack share
<b>Subtotal</b>			
<b>Total (2)</b>			

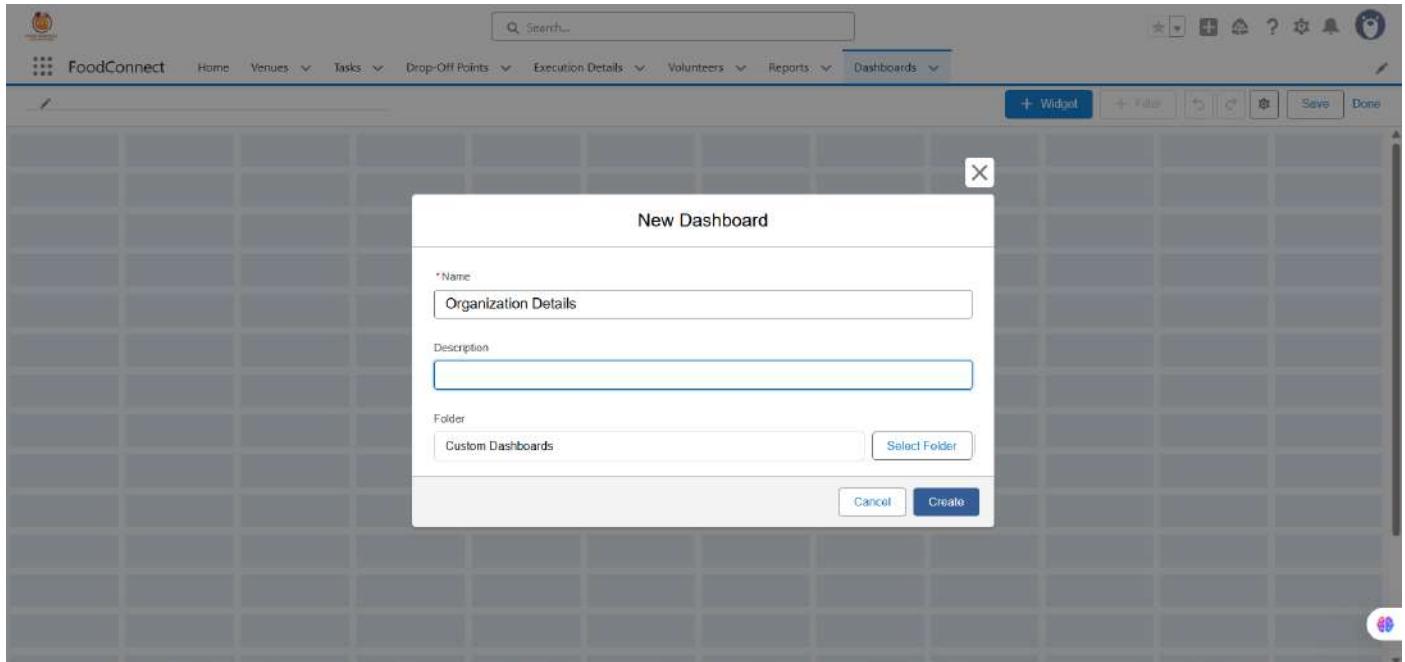
### 13)Creating Dashboards in the food connect app

Dashboards  
Created by Me

1 item

Name	Created By	Created On	Last Modified By	Last Modified Date
Custom Dashboards	Valtina A	9/9/2025, 11:07 AM	Valtina A	9/9/2025, 11:07 AM

- DASHBOARDS
- Recent
- Created by Me
- Private Dashboards
- All Dashboards
- FOLDERS
- All Folders
- Created by Me**
- Shared with Me
- FAVORITES
- All Favorites



a) widget 1

FoodConnect

Organization Details

+ Widget

Save Done

Select Report

**Reports**

**Recent**

- Created by Me
- Private Reports
- Public Reports
- All Reports

**Folders**

- Created by Me
- Shared with Me
- All Folders

Select Report

Search Reports and Folders

venue and Drop Off point  
Valtina A - Sep 9, 2025, 11:01 AM - Custom Reports

Volunteer Task  
Valtina A - Sep 9, 2025, 10:50 AM - Custom Reports

## Add Widget

Use chart settings from report (i)

Display As

Y-Ax Lightning Table

Volunteer Name

X-Axis

Record Count

Display Units

Shortened Number

Show Values

Show Chatter Photos

Preview

### venue and Drop Off point

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

[View Report \(venue and Drop Off point\)](#)

[Cancel](#)
[Add](#)

The screenshot shows the FoodConnect software interface. At the top, there is a navigation bar with icons for Home, Venues, Tasks, Drop-Off Points, Execution Details, Volunteers, Reports, and Dashboards. A search bar is located at the top center. On the right side of the header, there are various system icons. The main area displays a grid-based dashboard. A specific chart card titled "venue and Drop Off point" is visible on the left, showing a message: "We can't draw this chart because there is no data". Below this chart card is a link labeled "View Report (venue and Drop Off point)". The rest of the dashboard is a large, empty grid.

b)widget 2

The screenshot shows the FoodConnect dashboard with a single report card titled "venue and Drop Off point". The card displays the message "We can't draw this chart because there is no data." Below the card is a link "View Report (venue and Drop Off point)". The top navigation bar includes Home, Venues, Tasks, Drop-Off Points, Execution Details, Volunteers, Reports, and Dashboards. A floating action button (+ Widget) is visible in the top right corner.

The screenshot shows the FoodConnect dashboard with a modal window titled "Select Report" open. The modal contains a sidebar with "Reports" and "Folders" sections, and a main search area with a search bar and a "Reports and Folders" dropdown. Two reports are listed: "venue and Drop Off point" and "Volunteer Task", both created by Valeria A on Sep 9, 2025. At the bottom of the modal are "Cancel" and "Select" buttons. The background dashboard shows the same report card as the first screenshot.

The screenshot shows the FoodConnect dashboard with two report cards side-by-side. The left card is titled "venue and Drop Off point" and the right card is titled "Volunteer Task", both displaying the message "We can't draw this chart because there is no data." Below each card is a link "View Report (venue and Drop Off point)" and "View Report (Volunteer Task)". The top navigation bar and floating action button are visible.

c)widget 3

FoodConnect

Home Venues Tasks Drop-Off Points Execution Details Volunteers Reports Dashboards

Organization Details

+ Widget + Filter Save Done

venue and Drop Off point

Volunteer Task

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

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

View Report (venue and Drop Off point)

View Report (Volunteer Task)

This screenshot shows the FoodConnect application's dashboard. At the top, there are navigation links for Home, Venues, Tasks, Drop-Off Points, Execution Details, Volunteers, Reports, and Dashboards. Below this, the 'Organization Details' section is visible. A modal window titled '+ Widget' is open, showing options for 'Chart or Table', 'Text', and 'Image'. Two report cards are displayed side-by-side: 'venue and Drop Off point' and 'Volunteer Task'. Both cards show a message stating 'We can't draw this chart because there is no data.' Below each card is a link to 'View Report'. The overall interface has a light blue and white color scheme.

Open

Downloads

Search Downloads

Organize New folder

Name	Date modified	Type	Size
ai model amer			
camify	Earlier this week		
AI SMART CA	download (1)	JPG File	
old	download	JPG File	
cepZproject	Last week		
cp graphs	ChatGPT Image Sep 3, 2025, 10_07_02 AM	PNG File	1.8
damage detect	Last month		
_pycache_	ChatGPT Image Aug 29, 2025, 03_42_48 P...	PNG File	1.8
images	WhatsApp Image 2025-08-29 at 3.37.47...	JPEG File	

File name: Custom Files

Open Cancel

Image

Drag an image here or Browse Files

Accepts: .svg,.png,.jpeg,.jpg,.gif,.bmp

Cancel Add

This screenshot shows the FoodConnect application's dashboard with a file selection dialog overlaid. The dialog is titled 'Open' and shows the contents of the 'Downloads' folder. It includes a table with columns for Name, Date modified, Type, and Size. Below the table is a file input field with 'Custom Files' selected, and buttons for 'Open' and 'Cancel'. The main dashboard area shows a report card for 'venue and Drop Off point' and a modal for adding a new widget. The file dialog also contains a section for dragging files and a list of accepted file types: .svg, .png, .jpeg, .jpg, .gif, .bmp. At the bottom right of the dialog are 'Cancel' and 'Add' buttons.

## Select Image



download (1).jpg

X

Scale

Original

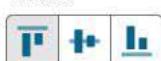
Preview



Alignment

Horizontal

Vertical



Tooltip

Add hover text...

Alternate Text

Describe this image...

Cancel

Add



FoodConnect

Home

Venues

▼

Tasks

▼

Drop-Off Points

▼

Execution Details

▼

Volunteers

▼

Reports

▼

Dashboards

Organization Details

Search...



venue and Drop Off point

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

[View Report \(venue and Drop Off point\)](#)

Volunteer Task

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

[View Report \(Volunteer Task\)](#)



The screenshot shows the FoodConnect dashboard under the 'Organization Details' section. At the top, there's a search bar and various navigation links like Home, Venues, Tasks, Drop-Off Points, Execution Details, Volunteers, Reports, and Dashboards. A message indicates the report is as of Sep 12, 2025, 9:51 AM, viewing as Valentina A.

**venue and Drop Off point**

Volunteer Name	Record Count
Susanna	1
Susi	1

**Volunteer Task**

A bar chart titled 'Volunteer Task' showing Record Count versus Volunteer ID. The Y-axis ranges from 0 to 1.0, and the X-axis shows Volunteer IDs 3 and 4. Both have a value of 1.0.

**Image Grid**

A grid of nine images showing people at a meal, likely volunteers at a food drop-off point.

**Buttons**

Refresh, Edit, Subscribe, and a dropdown menu.

## 14) Creation of Sharing Rules

### a) Rule 1

The screenshot shows the Salesforce Setup Home page. The search bar at the top contains 'sharing'. On the left, there's a sidebar with 'Security' expanded, showing 'Guest User Sharing Rule Access' and 'Sharing Settings'. A note says 'Didn't find what you're looking for? Try using Global Search.' Below the sidebar, there are three main sections: 'Data Cloud', 'Get Started with Einstein Bots', and 'Mobile Publisher'. Each section has a 'Setup' button and a 'Watch Video' or 'Let's Go' button. At the bottom, there's a 'Most Recently Used' section with a table showing recently used items. The URL in the address bar is <https://orgfarm-b9fab6cc01-dev-ed.lightning.force.com/lightning/setup/SecuritySharing/home>.

Cloud icon

Setup Home Object Manager

Search Setup

Sharing Settings

User Provisioning Request Private Private ✓

Waitlist Private Private ✓

Web Cart Document Private Private ✓

Work Order Private Private ✓

Work Plan Private Private ✓

Work Plan Template Private Private ✓

Work Step Template Private Private ✓

Work Type Private Private ✓

Work Type Group Public Read/Write Private ✓

Drop-Off Point Public Read/Write Private ✓

Equipment Maintenance Item Controlled by Parent Controlled by Parent

Execution Detail Controlled by Parent Controlled by Parent

Favorite Controlled by Parent Controlled by Parent

Offer Controlled by Parent Controlled by Parent

Property Public Read/Write Private ✓

Student Public Read/Write Private ✓

Task Public Read/Write Private ✓

Vehicle Public Read/Write Private ✓

Venue Public Read/Write Private ✓

Volunteer Controlled by Parent Controlled by Parent

Other Settings

https://orgfarm-b9fab6c81-dev-ed.lightning.force.com/lightning/setup/SecuritySharing/home

Cloud icon

Setup Home Object Manager

Search Setup

Sharing Settings

Work Type Sharing Rules New Recalculate Work Type Sharing Rules Help

No sharing rules specified.

Work Type Group Sharing Rules New Recalculate Work Type Group Sharing Rules Help

No sharing rules specified.

Drop-Off Point Sharing Rules New Recalculate Drop-Off Point Sharing Rules Help

No sharing rules specified.

Property Sharing Rules New Recalculate Property Sharing Rules Help

No sharing rules specified.

Student Sharing Rules New Recalculate Student Sharing Rules Help

No sharing rules specified.

Task Sharing Rules New Recalculate Task Sharing Rules Help

No sharing rules specified.

Vehicle Sharing Rules New Recalculate Vehicle Sharing Rules Help

No sharing rules specified.

**SETUP**

## Sharing Settings

Sharing Type	Action Buttons	Help
Work Type Sharing Rules	New Recalculate	Work Type Sharing Rules Help ?
No sharing rules specified.		
Work Type Group Sharing Rules	New Recalculate	Work Type Group Sharing Rules Help ?
No sharing rules specified.		
Drop-Off Point Sharing Rules	New Recalculate	Drop-Off Point Sharing Rules Help ?
No sharing rules specified.		
Property Sharing Rules	New Recalculate	Property Sharing Rules Help ?
No sharing rules specified.		
Student Sharing Rules	New Recalculate	Student Sharing Rules Help ?
No sharing rules specified.		
Task Sharing Rules	New Recalculate	Task Sharing Rules Help ?
No sharing rules specified.		
Vehicle Sharing Rules	New Recalculate	Vehicle Sharing Rules Help ?
No sharing rules specified.		

**SETUP**

## Sharing Settings

### Drop-Off Point Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

**Step 1: Rule Name**

Label	Rule 1	Required Information
Rule Name	Rule_1	
Description	<input type="text"/>	

**Step 2: Select your rule type**

Rule Type:  Based on record owner  Based on criteria

**Step 3: Select which records to be shared**

Criteria	Field	Operator	Value	Logical Operator
	Calculated Distance	less than	15	AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		

**SETUP**

## Sharing Settings

Step 2: Select your rule type

Rule Type  Based on record owner  Based on criteria

Step 3: Select which records to be shared

Criteria	Field	Operator	Value	AND
	Calculated Distance	less than	15	AND
	-None-	-None-		AND
	-None-	-None-		AND
	-None-	-None-		AND
	-None-	-None-		

[Add Filter Logic...](#)

Additional Options  Include records owned by users who can't have an assigned role [?](#)

Step 4: Select the users to share with

Share with

Step 5: Select the level of access for the users

Access Level

[Save](#) [Cancel](#)

[Save](#)

An embedded page at orgfarm-b9fab6ce81-dev-ed.develop.my.salesforce.com says

The recalculation of sharing access will continue in the background. You'll receive an email notification upon completion. Do you want to continue?

[OK](#) [Cancel](#)

Step 2: Select your rule type

Rule Type  Based on record owner  Based on criteria

Step 3: Select which records to be shared

Criteria	Field	Operator	Value	AND
	Calculated Distance	less than	15	AND
	-None-	-None-		AND
	-None-	-None-		AND
	-None-	-None-		

[Add Filter Logic...](#)

Additional Options  Include records owned by users who can't have an assigned role [?](#)

Step 4: Select the users to share with

Share with

Step 5: Select the level of access for the users

Access Level

[Save](#) [Cancel](#)

## b)Rule 2

SETUP Sharing Settings

Setup Drop-Off Point Sharing Rule Help for this Page ?

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

**Step 1: Rule Name** ! Required Information

Label	Rule 2
Rule Name	Rule_2
Description	

**Step 2: Select your rule type**

Rule Type  Based on record owner  Based on criteria

**Step 3: Select which records to be shared**

Criteria	Field	Operator	Value	Logic
	Calculated Distance	greater than	15	AND
	Calculated Distance	less or equal	30	AND
	-None-	-None-		AND
	-None-	-None-		AND
	-None-	-None-		

SETUP Sharing Settings

Step 2: Select your rule type

Rule Type  Based on record owner  Based on criteria

Step 3: Select which records to be shared

Criteria	Field	Operator	Value	Logic
	Calculated Distance	greater than	15	AND
	Calculated Distance	less or equal	30	AND
	-None-	-None-		AND
	-None-	-None-		AND
	-None-	-None-		

Add Filter Logic...  
Additional Options  Include records owned by users who can't have an assigned role [?](#)

Step 4: Select the users to share with

Share with  NSS

Step 5: Select the level of access for the users

Access Level

### c) Rule 3

**Sharing Settings**

**Drop-Off Point Sharing Rule**

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

**Step 1: Rule Name**

Label: Rule 3  
Rule Name: Rule\_3  
Description:

**Step 2: Select your rule type**

Rule Type:  Based on record owner  Based on criteria

**Step 3: Select which records to be shared**

Criteria	Field	Operator	Value	Logic
	Calculated Distance	greater than	30	AND
	Calculated Distance	less or equal	50	AND
	-None-	-None-		AND
	-None-	-None-		AND
	-None-	-None-		

**Sharing Settings**

**Step 2: Select your rule type**

Rule Type:  Based on record owner  Based on criteria

**Step 3: Select which records to be shared**

Criteria	Field	Operator	Value	Logic
	Calculated Distance	greater than	30	AND
	Calculated Distance	less or equal	50	AND
	-None-	-None-		AND
	-None-	-None-		AND
	-None-	-None-		

Add Filter Logic...  
Additional Options:  include records owned by users who can't have an assigned role

**Step 4: Select the users to share with**

Share with: Public Groups: Street Cause

**Step 5: Select the level of access for the users**

Access Level: Read Only

Save Cancel Save

**Sharing Settings**

**Work Type Group Sharing Rules**

New Recalculate Work Type Group Sharing Rules Help

No sharing rules specified.

**Drop-Off Point Sharing Rules**

New Recalculate Drop-Off Point Sharing Rules Help

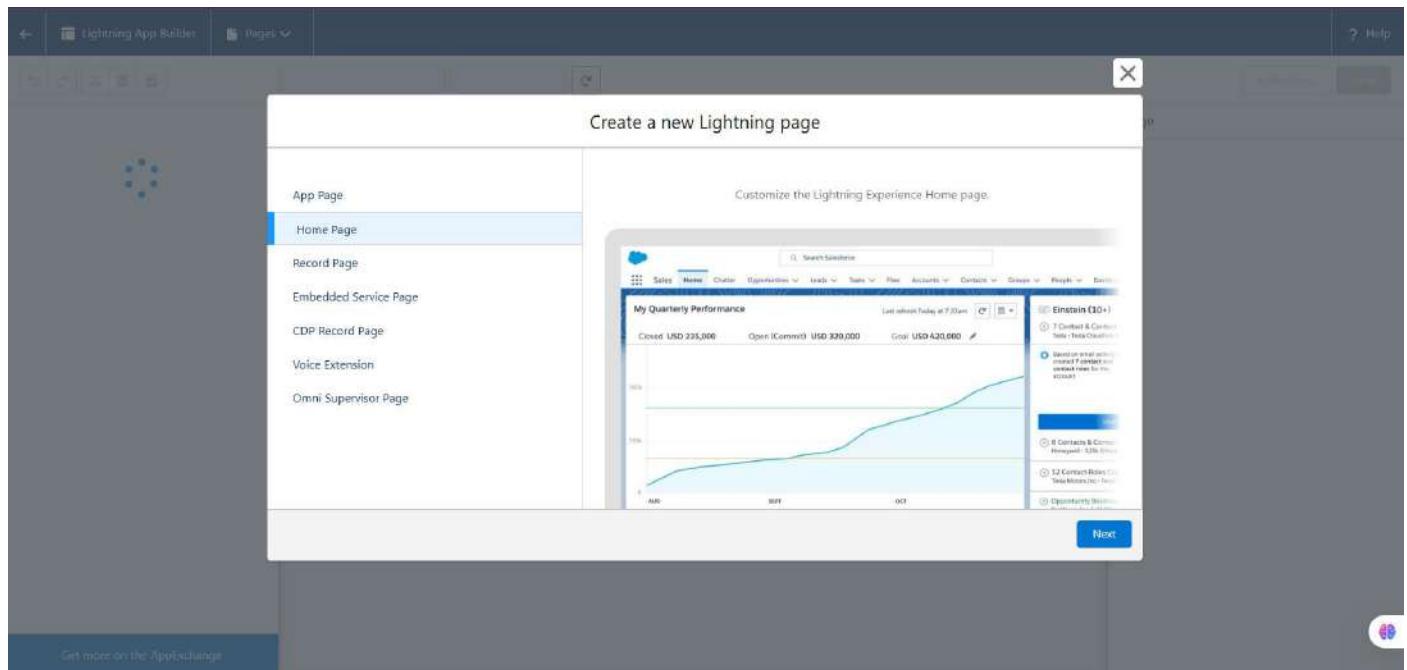
Action	Criteria	Shared With	Access Level
Edit   Del	Drop-OFF Point: Calculated Distance LESS THAN 15	Group: Iksha	Read Only
Edit   Del	(drop-off Point: Calculated Distance GREATER THAN 15) AND (drop-off Point: Calculated Distance LESS OR EQUAL 30)	Group: NSS	Read Only
Edit   Del	(drop-off Point: Calculated distance GREATER THAN 30) AND (drop-off Point: Calculated distance LESS OR EQUAL 50)	Group: Street Cause	Read Only

## 15)Create a home page and connect it with the food connect app

The screenshot shows the Salesforce Setup Home page. The search bar at the top contains "Q. lightning app". The main content area features three cards: "Data Cloud" (Setup), "Get Started with Einstein Bots" (Setup), and "Mobile Publisher" (Setup). Below these cards is a section titled "Most Recently Used" which lists two items: "Drop-Off Points with Volunteers with Execution Details" and "Volunteers with Execution Details and Tasks", both categorized as "Custom Report Type".

The screenshot shows the Lightning App Builder page. The search bar at the top contains "Q. lightning app". The main content area is titled "Lightning App Builder" and contains a brief description: "The Lightning App Builder provides an easy to use graphical interface for creating custom Lightning pages for Salesforce Lightning Experience and mobile app. Lightning pages are built using Lightning components—compact, configurable, and reusable elements that you can drag and drop into regions of the page in the Lightning App Builder." Below this is a table titled "Lightning Pages" with the following data:

Action	Label	Name	New	Namespace Prefix	Description	Type	Created By	Last Modified By
Edit   Clone   Del	Bike_Card	Bike_Card				App Page	val. 8/9/2025, 9:24 AM	val. 8/9/2025, 9:44 AM
Edit   Clone   Del	Create_Default_Data	Create_Default_Data				App Page	val. 8/9/2025, 12:27 PM	val. 8/9/2025, 12:27 PM
Edit   Clone   Del	Home_Page_Default	Home_Page_Default				Home Page	val. 8/9/2025, 5:14 AM	val. 8/9/2025, 5:14 AM
Edit   Clone   Del	Home_Page_Default	Home_Page_Default				Home Page	val. 8/9/2025, 5:17 AM	val. 8/9/2025, 5:17 AM



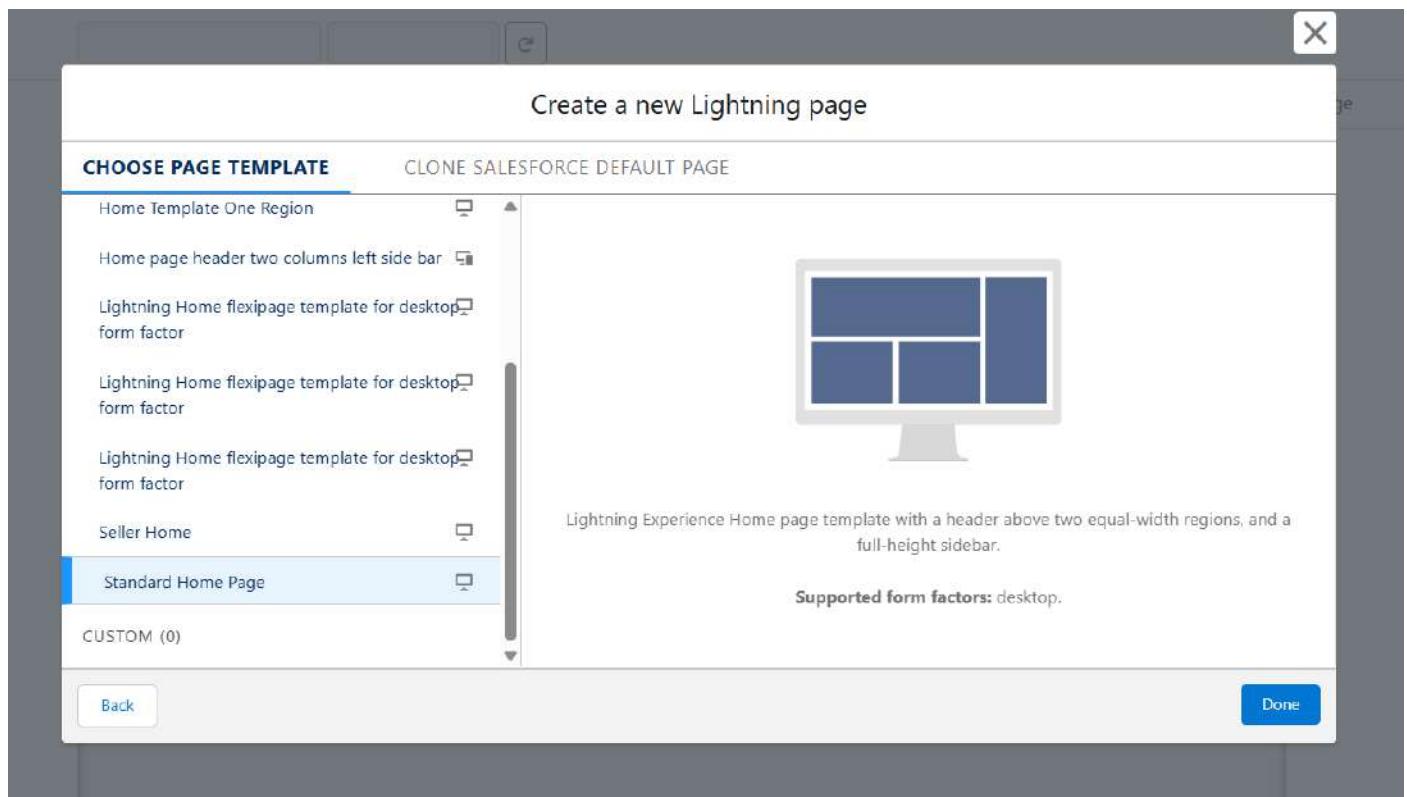
Create a new Lightning page

\* Label

HOME Page

Back

Next



Lightning App Builder Pages HOME Page

Desktop Shrink To View

Activation... Save

Components

Q flow

**Standard (3)**

- Flow
- Flow Ap Run a flow
- Paused If Supported form factors: desktop and phone

**Custom (0)**

**Custom - Managed (0)**

Add Component(s) Here

Add Component(s) Here

Add Component(s) Here

**Page**

\*Label HOME Page

\*API Name HOME\_Page

\*Page Type Home Page

Template Standard Home Page Change

Description

View more on the AppExchange Javascript:void(0);

This screenshot shows the Lightning App Builder interface for creating a new page. The top navigation bar includes 'Lightning App Builder', 'Pages', and 'HOME Page'. The main area is titled 'HOME Page' and shows a 'Desktop' view. Components on the page include three 'Flow' components. The 'Components' sidebar on the left lists 'Standard' and 'Custom' components. The 'Page' configuration sidebar on the right includes fields for 'Label' (set to 'HOME Page'), 'API Name' (set to 'HOME\_Page'), 'Page Type' (set to 'Home Page'), 'Template' (set to 'Standard Home Page'), and a 'Description' field. A note at the bottom says 'View more on the AppExchange'.

Desktop Shrink To View C

Activation... Save

Page > Flow

Flow Component: Add or Modify Service Appointment Attendees  
This is a placeholder. Flows don't run in the canvas.

\* Flow  

Layout  

Optional, enter values for these flow variables. Only variables that allow input access are supported.

emailTemplate

flowExecutionMode

recordId

unenrollUrlPrefix

 Set Component Visibility 

Filters 

[Activation...](#)[Save](#)

## Page &gt; Flow

Flows don't run in the canvas so that they don't accidentally do something in your org, like create or delete records.

\* Flow

Venue Form

[Edit Flow in Flow Builder](#)

Layout

One Column



Optionally, enter values for these flow variables. Only variables that allow input access are supported.

Latitude\_c

## ▼ Set Component Visibility

Filters

[+ Add Filter](#)

Lightning App Builder | Pages | HOME Page | ? Help

Components

Q dash

Standard (3)

- CRM Analytics Dashboard
- Dashboard
- LWC CRM Analytics Dashboard

Custom (0)

Custom - Managed (0)

Get more on the AppExchange

javascript:void(0);

Desktop | Shrink To View | C

Page > Flow

Flow Component: Venue Form  
This is a placeholder. Rows don't run in the canvas.

\* Flow: Venue Form

Edit Flow in Flow Builder

Layout: One Column

Optional, enter values for these flow variables. Only variables that allow input access are supported.

Latitude.c

Set Component Visibility

Filters

+ Add Filter

This screenshot shows the Lightning App Builder interface. On the left, there's a sidebar with components like 'CRM Analytics Dashboard', 'Dashboard', and 'LWC CRM Analytics Dashboard'. The main area shows a page canvas with a placeholder for a 'Venue Form' component. The right panel is titled 'Page > Flow' and contains settings for the flow component, including a search bar for 'Venue Form', an 'Edit Flow in Flow Builder' button, and a 'Layout' section set to 'One Column'. It also includes a note about flow variables and a 'Set Component Visibility' section with a 'Filters' button.

Lightning App Builder | Pages | HOME Page | ? Help

Components

Q dash

Standard (3)

- CRM Analytics Dashboard
- Dashboard
- LWC CRM Analytics Dashboard

Custom (0)

Custom - Managed (0)

Get more on the AppExchange

javascript:void(0);

Desktop | Shrink To View | C

Page > Dashboard

Dashboard: Organization Details (Custom Dashboards)

Max Height: 1

Hide on Error:

Set Component Visibility

Filters

+ Add Filter

This screenshot shows the Lightning App Builder interface. The main area displays a 'Dashboard' component titled 'Organization Details' with a timestamp of 'As of Sep 12, 2025, 8:51 AM'. Below the title are sections for 'venue and Drop Off point' and 'Volunteer Task', each with a small image. The right panel is titled 'Page > Dashboard' and contains settings for the dashboard component, including a search bar for 'Organization Details (Custom Dashboards)', a 'Max Height' input field, a 'Hide on Error' checkbox (which is checked), and a 'Set Component Visibility' section with a 'Filters' button.

Lightning App Builder | Pages | HOME Page | ? Help

Changes saved. Activation... Save

Components

Q dash

Standard (3)

- CRM Analytics Dashboard
- Dashboard
- LWC CRM Analytics Dashboard

Custom (0)

Custom - Managed (0)

Get more on the AppExchange

javascript:void(0);

Desktop | Shrink To View | C

Page > Dashboard

Dashboard: Organization Details (Custom Dashboards)

Max Height: 1

Hide on Error:

Set Component Visibility

Filters

+ Add Filter

Page Saved

Activate this page to make it visible to your users.

Activate the page now, or do it later using the Activation button in the App Builder toolbar.

Don't show this message again

Not Yet | Activate

This screenshot shows the Lightning App Builder interface after saving a page. A modal window titled 'Page Saved' is displayed in the center. It contains instructions to activate the page for users and two buttons: 'Not Yet' and 'Activate'. Below the modal, there's a message about activating the page now or later using the toolbar. The right panel is titled 'Page > Dashboard' and contains settings for the dashboard component, including a search bar for 'Organization Details (Custom Dashboards)', a 'Max Height' input field, a 'Hide on Error' checkbox (which is checked), and a 'Set Component Visibility' section with a 'Filters' button.

Lightning App Builder | Pages | HOME Page

### Activation: HOME Page

Home pages can be assigned at different levels:

- The org default** home page is displayed unless more specific assignments are made.
- The app default** home page is displayed for specified apps, and overrides the org default.
- Any app and profile** assignments are displayed for specified app and profile combinations, and they override all other assignments.

[Learn more about forecast page assignment in Salesforce Help.](#)

Org Default   App Default   App and Profile

Set this home page as the org default to display for all users unless other assignments apply.

[Assign as Org Default](#)

[Close](#)

Get more on the AppExchange

Activation... Save

Dashboard Organization Details (Custom Dashboards)

Height:  Hide on Error:

Set Component Visibility

Add Filter

Pages | HOME Page

### Activation: HOME Page

Home pages can be assigned at different levels:

- The org default** home page is displayed unless more specific assignments are made.
- The app default** home page is displayed for specified apps, and overrides the org default.
- Any app and profile** assignments are displayed for specified app and profile combinations, and they override all other assignments.

[Learn more about forecast page assignment in Salesforce Help.](#)

Org Default   App Default   App and Profile

Set this home page as the org default to display for all users unless other assignments apply.

[Assign as Org Default](#)

[Close](#)

Pages HOME Page X

## Activation: HOME Page

Home pages can be assigned at different levels:

- The org default** home page is displayed unless more specific assignments are made.
- The app default** home page is displayed for specified apps, and overrides the org default.
- Any app and profile** assignments are displayed for specified app and profile combinations, and they override all other assignments.

Learn more about forecast page assignment in [Salesforce Help](#).

Org Default App Default **App and Profile**

Set this home page as the default for specific Lightning apps. This page displays for all users using the app unless specific profile-related assignments apply.

Assign to Apps Close

Desktop Charts To My Home Page X

## Select Apps

Selected Lightning apps display "HOME Page" as the home page.

Lightning Apps (16)		1 Selected
App Name	Description	
Audience360	Build a thorough and complete understanding of your customers.	
<input type="checkbox"/> Data Manager	Use Data Manager to view limits, monitor usage, and manage recipes.	
<input type="checkbox"/> FlowsApp	Automate business processes and repetitive tasks.	
<input checked="" type="checkbox"/> FoodConnect		
<input type="checkbox"/> How We Roll Maintenance		
<input type="checkbox"/> LightningBolt	Discover and manage business solutions designed for your industry.	
<input type="checkbox"/> LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	

Cancel Back Next

Desktop Shrink To View C X

## Review Assignments

Review Assignments (1)		
App Name	Current App Default	New App Default
FoodConnect	Home Page Default	HOME Page

[Cancel](#) [Back](#) [Save](#)

← Lightning App Builder Pages HOME Page Activation... Save ? Help

Desktop Shrink To View C

Components

dash

- Standard (3)
  - CRM Analytics Dashboard
  - Dashboard
  - LWC CRM Analytics Dashboard
- Custom (0)
- Custom - Managed (0)

Organization Details As of Sep 12, 2023, 8:51 AM (Viewing as Valeria A.)

venue and Drop Off point

Volunteer Task

Flow Component

This is a placeholder. Please don't run in the center.

Page > Dashboard

\* Dashboard Organization Details (Custom Dashboards) Search

Max Height: 100px

Hide on Error

Set Component Visibility

Add Filter

Get more on the AppExchange

The screenshot shows the FoodConnect application interface. At the top, there's a navigation bar with links for Home, Venues, Tasks, Drop-Off Points, Execution Details, Volunteers, Reports, and Dashboards. A search bar is also at the top. The main content area has several sections:

- Organization Details:** Shows a list of venues and drop-off points with their names and record counts.
- venue and Drop Off point:** A table with columns for Volunteer Name and Record Count, showing entries for Susan and SUSI.
- Volunteer Task:** A chart showing the distribution of volunteer tasks across four categories (3, 4, 1, 0.5) with a total count of 1.
- Volunteer ID:** A grid of images showing people eating at tables.
- Venue Form:** A form for creating a new venue, requiring fields for Venue Name, Email, Phone, Venue Location, Latitude, and Longitude. A "Next" button is at the bottom right.

At the bottom right, there's a timestamp: 12 September 2025, Fri 22:53 (Local time).

## FUNCTIONAL AND PERFORMANCE TESTING

- a) Created new venue, task, execution detail to see the update in the reports and dashboards of the app

The screenshot shows the 'New Venue' creation form. The title is 'New Venue' and there's a note: '\* = Required Information'. The form is divided into sections:

- Information:** Contains fields for required information: \*Venue Name (karaikudi Park), \*Contact Email (valtisusan07@gmail.com), and \*Contact Phone (6383796201). It also includes fields for Latitude (80) and Longitude (90), and a 'Venue Location' field containing 'karaikudi-sivangi district'.
- Owner:** Shows Valtina A as the owner.
- Buttons:** At the bottom are 'Cancel', 'Save & New', and a large blue 'Save' button.

## New Drop-Off Point

\* = Required Information

### Information

\* Drop-Off Point Name

Owner

 Valtina A  

Location 2

\* Latitude

\* Longitude

\* Venue

 karaikudi Park ×

\* State

\* Calculated Distance

Cancel Save

## New Task

\* = Required Information

### Information

\* Task Name

Owner

 Valtina A  

Venue

 karaikudi Park ×

Drop-Off Point

 thirupathur church ×

\* Distance

Task ID

\* Date

 Calendar icon

Food Category

Number of People Served

Cancel Save & New Save

## New Volunteer

\* = Required Information

### Information

\* Volunteer Name

\* Drop-Off Point

Volunteer ID

Gender

\* Available On

\* Age

\* Email

Cancel

Save

\* Contact Number

 Volunteer "selvi" was created.



[View Execution Detail](#)

\* = Required Information

### Information

\* Execution Detail Name

\* Volunteer

\* Task



Execution ID

Cancel

Save & New

Save

Result:

Report: Venue with DropOff with Volunteer venue and Drop Off point				
Total Records	Total Calculated Distance			
	Volunteer Name	Venue Name	Drop-Off Point Name	Calculated Distance
<input type="checkbox"/> selvi (1)	selvi	karaikudi Park	thirupathur church	0
Subtotal				0
<input type="checkbox"/> selvi.n (1)	selvi.n	karaikudi Park	thirupathur church	0
Subtotal				0
Total (2)				0

Row Counts  Detail Rows  Subtotals  Grand Total

## ADVANTAGES AND DISADVANTAGES

### Advantages

1. Helps reduce food wastage while addressing hunger by redistributing surplus food efficiently.
2. Leverages Salesforce automation and analytics to ensure transparency, real-time tracking, and improved coordination between donors and NGOs.

### Disadvantages

1. Relies heavily on internet connectivity and technology, which may limit usage in remote or rural areas.
2. Requires active participation and timely response from donors, NGOs, and volunteers; otherwise, food may still go unused.

## CONCLUSION

*Food Connect* serves as a transformative initiative that combines technology with social responsibility to address two critical challenges—food wastage and hunger. By utilizing the power of Salesforce for real-time coordination, tracking, and analytics, the project creates an efficient system that links surplus food with those who need it most. While it requires consistent participation and technological support, its potential impact in fostering sustainable, hunger-free communities is immense. This project not only delivers immediate benefits to underprivileged people but also sets a path toward building a society where no food goes to waste and no person goes unfed.

## APPENDIX

**Source code:** Apex Trigger for Drop-Off Point\_c

### *DropOff trigger*

```
trigger DropOffTrigger on Drop_Off_Point__c (before insert) {  
    for(Drop_Off_Point__c Drop : Trigger.new){  
        Drop.Calculated_Distance__c = Drop.distance_calculation__c;  
    }  
}
```