

## **INTRODUCTION:**

Food wastage is a major concern globally, especially in countries where millions of people struggle with hunger and poverty. Every day, a large amount of edible food is discarded from households, restaurants, events, and other establishments. At the same time, countless individuals go to bed hungry, lacking even a single nutritious meal.

## **AIM:**

The project "**To Supply Leftover Food to Poor**" aims to bridge this gap by collecting surplus or leftover food and distributing it to those in need. This initiative is driven by two core goals: reducing food wastage and addressing hunger in underprivileged communities.

By creating a network of donors (restaurants, caterers, households) and coordinating with volunteers and NGOs, the project seeks to ensure that excess food reaches the hungry instead of going to landfills. The emphasis will be on maintaining food safety, quick distribution, and creating a sustainable model that can be replicated in other areas.

This project not only provides meals to the poor but also fosters a sense of social responsibility and community engagement. It turns waste into hope — one meal at a time.

By turning surplus food into a source of nourishment for the needy, this initiative hopes to inspire compassion, responsibility, and a shared commitment to ending hunger. Ultimately, this project envisions a world where no food is wasted and no one sleeps hungry.

## MILESTONE-1

### Creating Developer Account:

1. Go to <https://www.salesforce.com/form/developer-signup/>
2. Click on sign up.
3. On the sign\_upform, enter the following details:

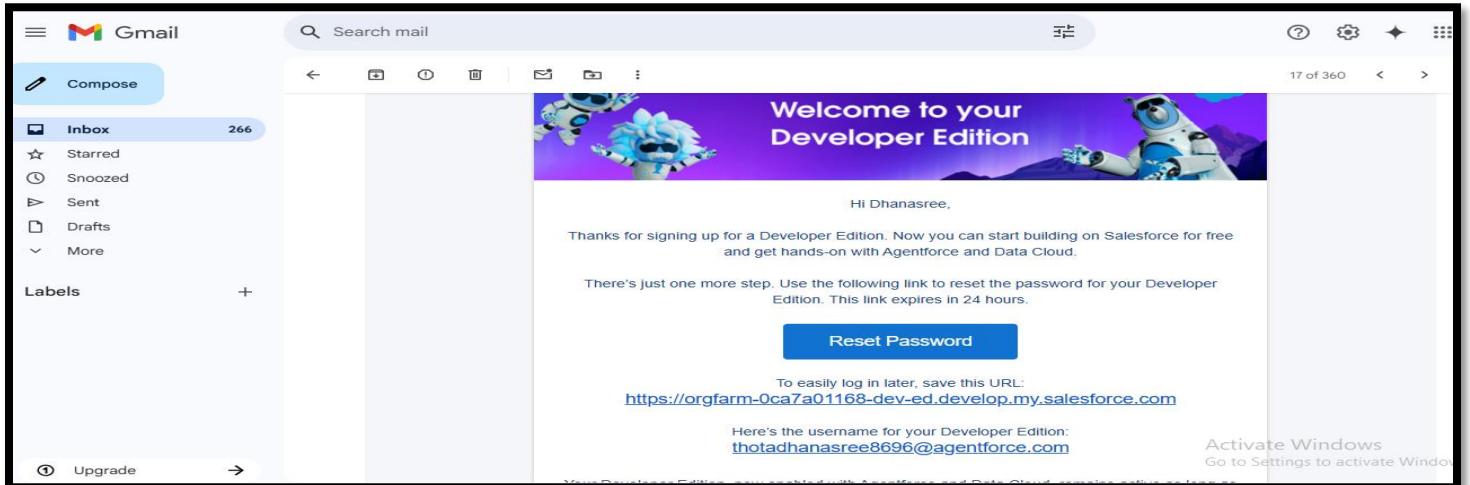
The screenshot shows the 'Sign up for your Developer Edition' page. It displays a free Salesforce Platform environment with Agentforce and Data Cloud. The form fields are as follows:

First name	Last name
MOUNIKA	PASUPULETI
Job title	Work email
Developer	mounikapasupuleti118@gmail.com
Company	Country/Region
GAYATRI DEGREE COLLEGE	India

A note at the bottom states: "Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure."

- First name & Last name: MOUNIKA & PASUPULETI
  - Job title: Developer
  - Email: mounikapasupuleti118@gmail.com
  - Company: GAYATRI DEGREE COLLEGE TIRUPATI
  - County: India
4. Click on sign up after filling this

## Account Activation:



## Developer Org Mail Verification

### 6. Login to your Salesforce Org

Salesforce Login: <https://login.salesforce.com>

### To Supply Leftover Food TO Poor (Salesforce Developer)

A screenshot of the Salesforce login page. At the top is a blue cloud-shaped logo with the word 'salesforce'. Below it is a form with fields for 'Username' and 'Password'. The 'Username' field contains the value 'mounikapasupuleti118496@agentforce.com'. The 'Password' field is filled with several dots. Below the password field is a large blue 'Log In' button. Underneath the 'Log In' button is a checkbox labeled 'Remember me' and two links: 'Forgot Your Password?' and 'Use Custom Domain'.

Developer Org Login Screen

## Milestone-02

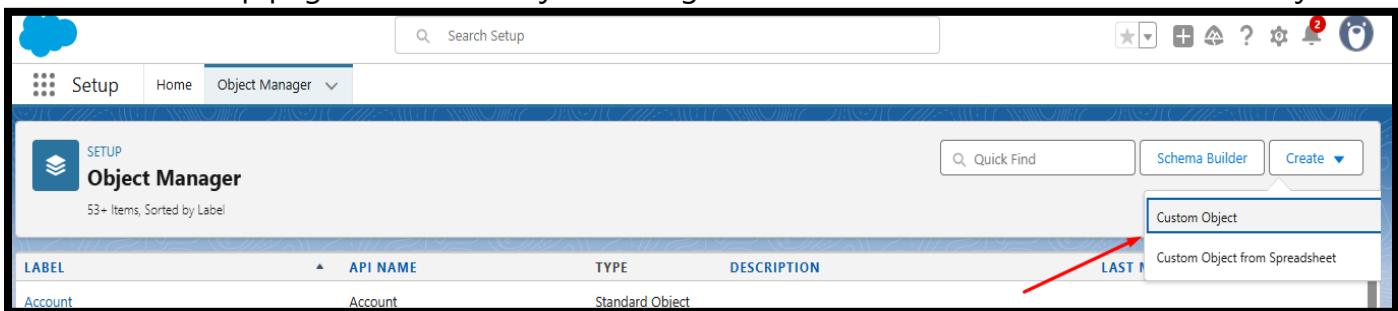
### Objects

To Navigate to Setup page:



To create an object:

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



2. On Custom object defining page:

3. Enter the label name, plural label name, click on Allow reports, Allow search.

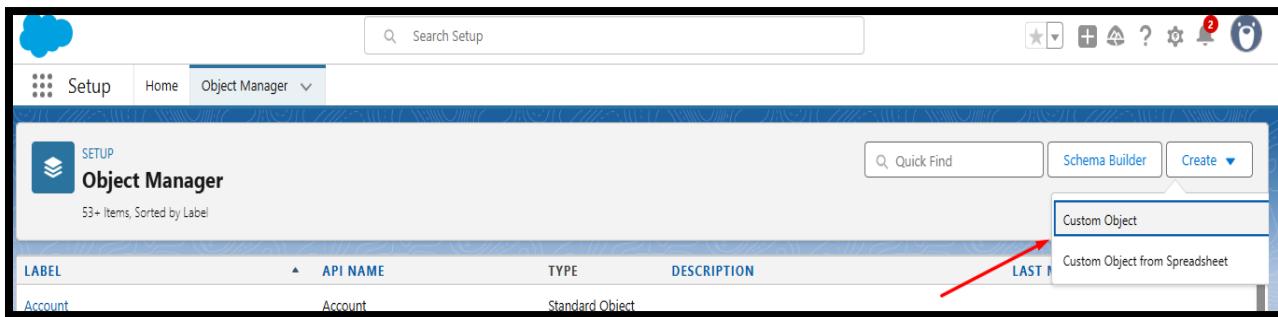
A screenshot of the 'New Custom Object' definition edit page. At the top, there is a header 'SETUP New Custom Object'. Below the header, there is a message: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles.' There are 'Tell me more!' and 'Don't show this message again' links. The main form is titled 'Custom Object Definition Edit' with buttons 'Save', 'Save & New', and 'Cancel'. The 'Custom Object Information' section contains fields for 'Label' (Example: Account) and 'Plural Label' (Example: Accounts). A checkbox 'Starts with vowel sound' is present. Below this, there is a note about the 'Object Name' field and its example value 'Account'. The entire form is enclosed in a black border.

4. Click on Save.

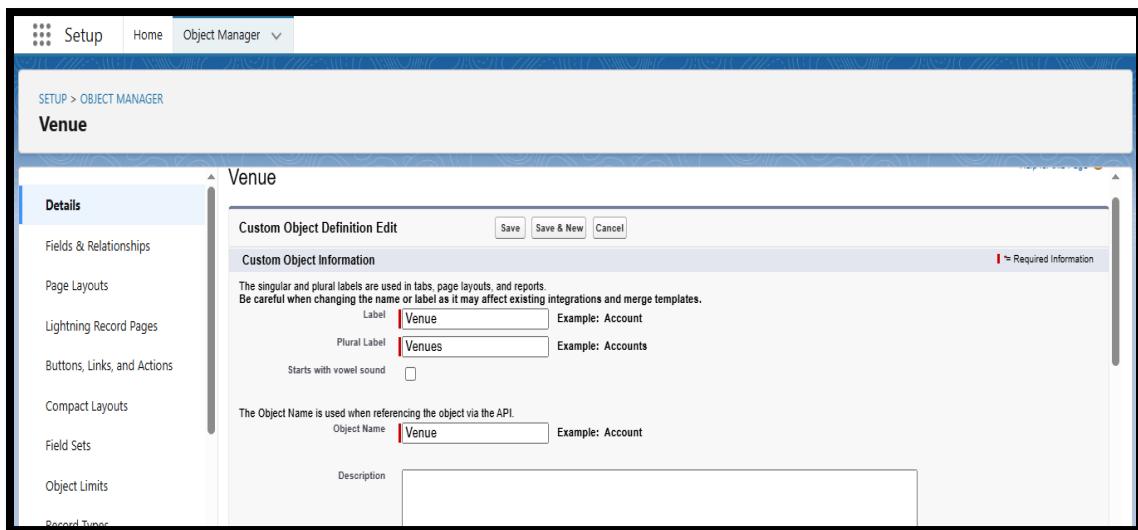
## Create Venue Object

To create an object:

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

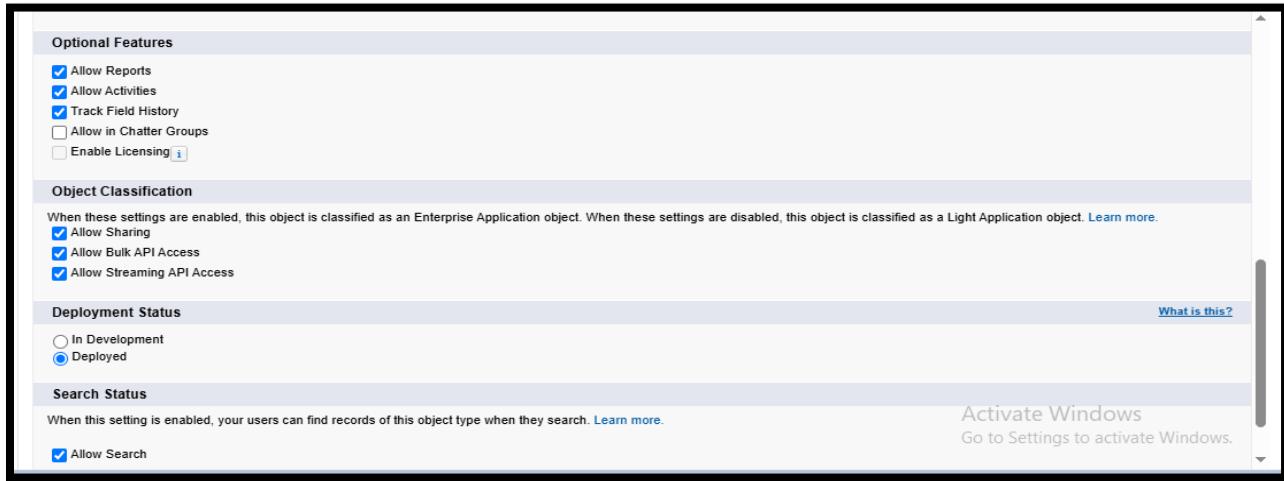


1. Enter the label name Venue
2. Plural label name Venues



3. Enter Record Name Label and Format
  - Record Name : Venue Name
  - Data Type : Text
2. Click on Allow reports and Track Field History, Allow Activities.

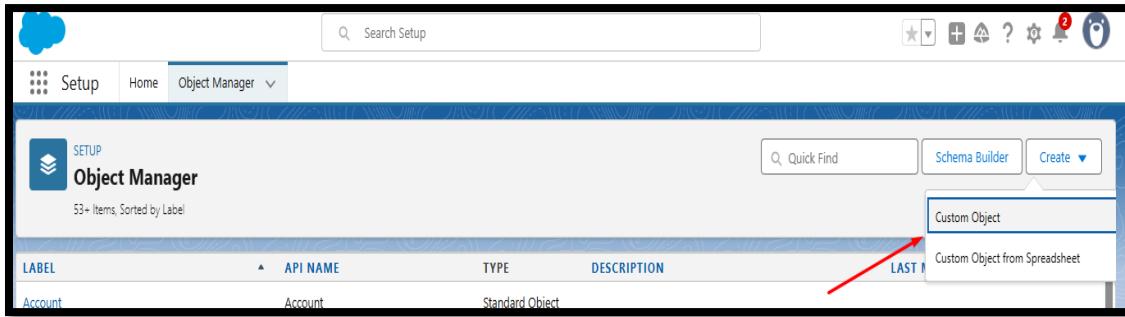
3. Allow search >> Save.



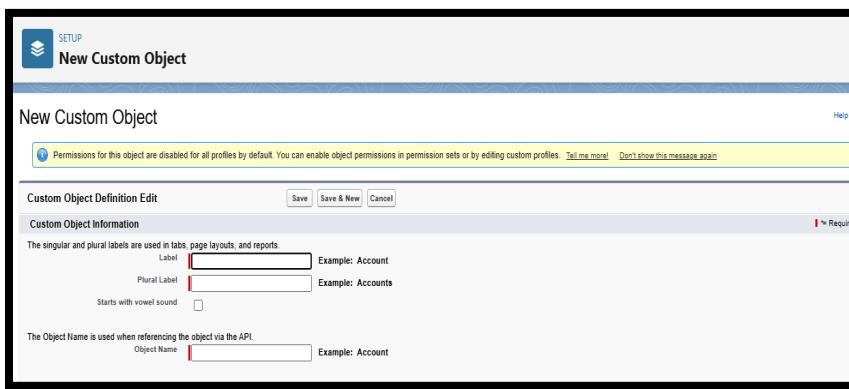
## Create Drop-Off Point Object:

To create an object:

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



1. Enter the label name >> Drop-Off Point
2. Plural label name>> Drop-Off Points
3. Enter Record Name Label and Format



- Record Name >> Drop-Off point Name
  - Data Type >> Text
2. Click on Allow reports and Track Field History,Allow Activities
  3. Allow search >> Save.



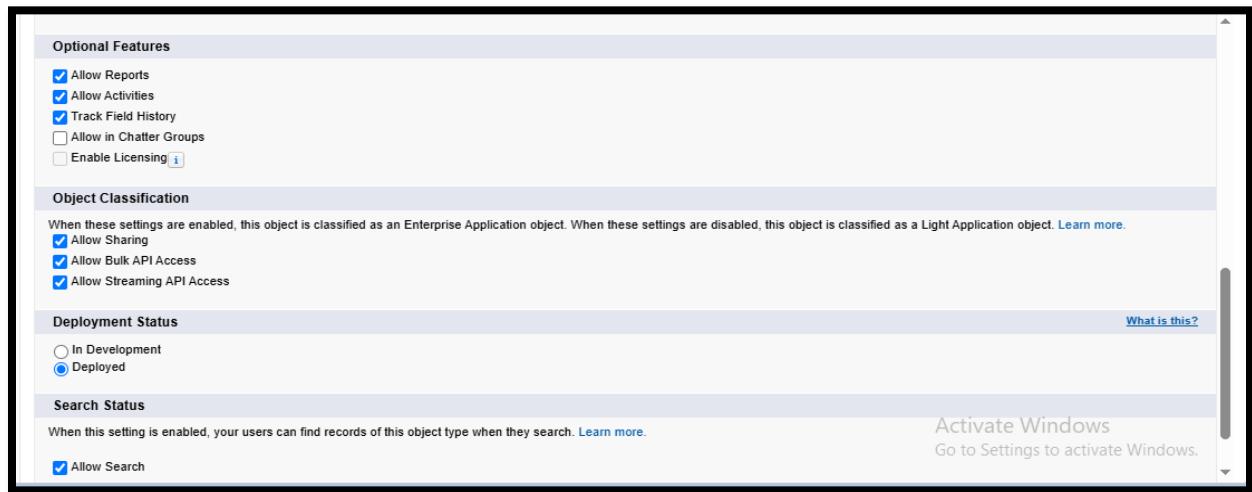
## Create Task Object:

To create an object:

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



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

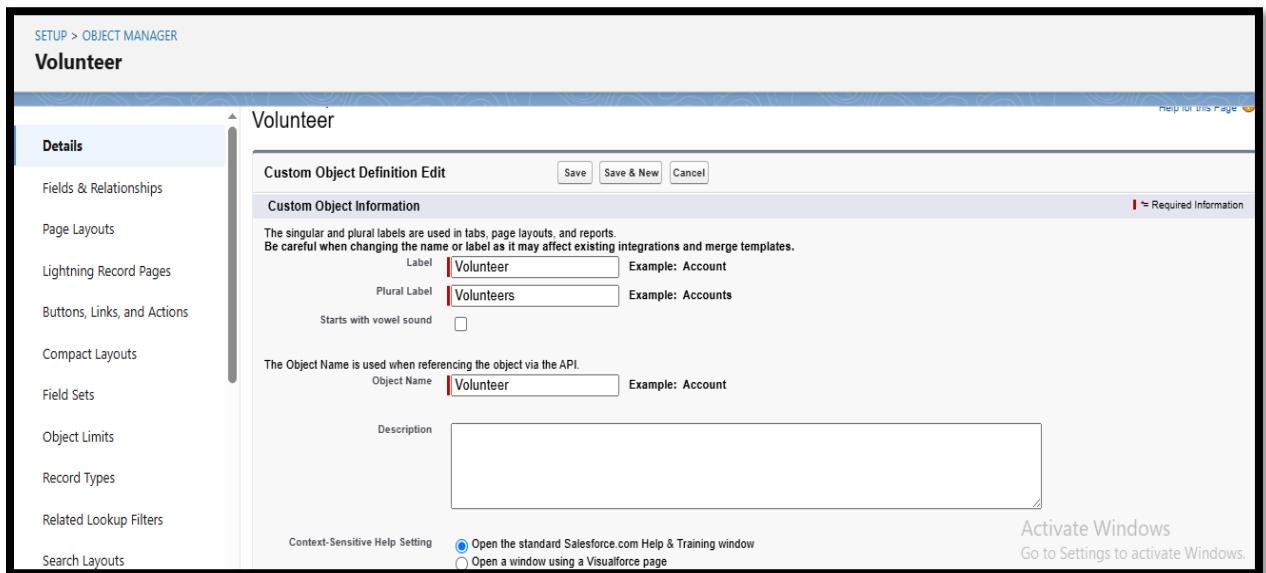


## Create Volunteer Object

To create an object:

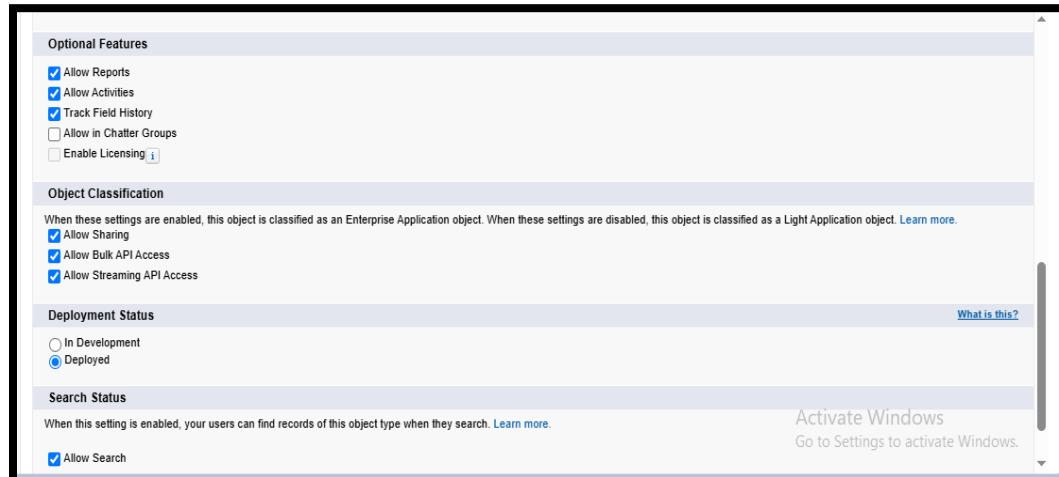
1. From the setup page >> Click on Object Manager>> Click on Create >> Click on Custom Object.

  1. Enter the label name Volunteer
  2. Plural label name Volunteers



### Enter Record Name Label and Format

- Record Name Volunteer Name
- Data Type Text



2. Click on Allow reports and Track Field History, Allow Activities
3. Allow search Save.

## Create Execution Details Object

### To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
  1. Enter the label name : Execution Detail
  2. Plural label name : Execution Details

The screenshot shows the 'Custom Object Definition Edit' interface. At the top, there are three buttons: 'Save', 'Save & New', and 'Cancel'. Below this is a section titled 'Custom Object Information' with a note: 'The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.' It contains fields for 'Label' (Execution Detail) and 'Plural Label' (Execution Details), both with examples: 'Example: Account' and 'Example: Accounts'. There is also a checkbox for 'Starts with vowel sound'. Below this is another section for 'Object Name' (Execution\_Detail) with 'Example: Account'.

3. Enter Record Name Label and Format
  - Record Name : Execution Detail Name
  - Data Type Text

This screenshot shows the 'Optional Features' and 'Deployment Status' sections of the object configuration. In 'Optional Features', several checkboxes are checked: 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. In 'Object Classification', three checkboxes are checked: 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'. Under 'Deployment Status', the radio button 'Deployed' is selected. In the 'Search Status' section, the checkbox 'Allow Search' is checked. A message on the right says 'Activate Windows' and 'Go to Settings to activate Windows.'

2. Click on Allow reports and Track Field History, Allow Activities
3. Allow search >> Save.

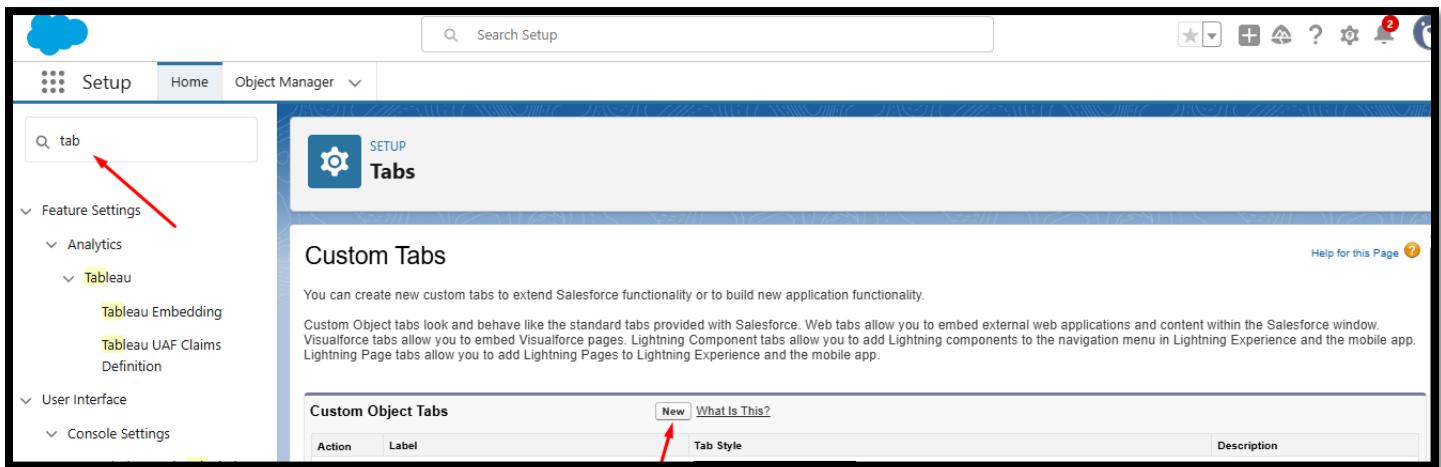
## Milestone-03

### Tabs

#### Creating a Custom Tab

##### To create a Tab:

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



1. Select Object(Venue) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .

The screenshot shows the 'Custom Tab Definition Edit' page for the 'Venues' object. The 'Custom Object Tab Information' section includes fields for 'Tab Label' (set to 'Venues'), 'Object' (set to 'Venue'), and 'Tab Style' (set to 'Building'). Below this, there is an optional field for a 'Splash Page Custom Link' with a dropdown menu showing '-None-'.

2. Make sure that the Append tab to users' existing personal customizations is checked.  
3. Click save

## To create a Tab: Drop-Off Points

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

The screenshot shows the Salesforce Setup interface. In the top left, there's a search bar with 'tab' typed into it. Below the search bar, the 'Setup' tab is selected. On the left, there's a sidebar with sections like 'Feature Settings', 'Analytics', 'Tableau' (which is expanded to show 'Tableau Embedding' and 'Tableau UAF Claims Definition'), and 'User Interface'. Under 'User Interface', 'Console Settings' is listed. The main content area is titled 'Tabs' and contains a section for 'Custom Tabs'. It says you can create new custom tabs to extend Salesforce functionality or build new application functionality. It explains that Custom Object tabs look like standard tabs, while Visualforce tabs embed pages, and Lightning Component tabs add components to the navigation menu. At the bottom, there's a table titled 'Custom Object Tabs' with columns for 'Action', 'Label', 'Tab Style', and 'Description'. A red arrow points to the 'New' button at the top right of this table.

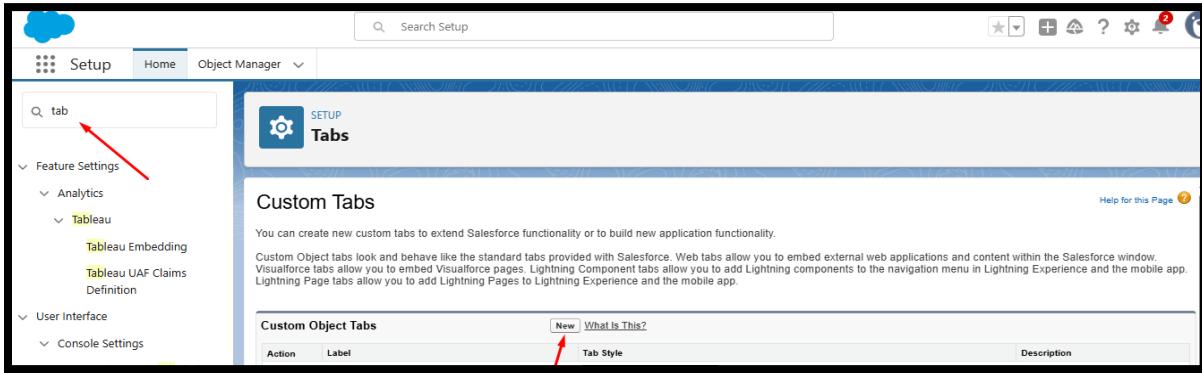
Select Object(Drop\_Off Point) >> Select the tab style >> Next (Add to profiles page) keep it as default  
>> Next (Add to Custom App) uncheck the include tab.

The screenshot shows the 'Edit Custom Object Tab' page for 'Drop-Off Points'. At the top, there's a 'Custom Tab Definition Edit' header. Below it, a 'Custom Object Tab Information' section has a 'Required Information' note. It shows 'Tab Label' as 'Drop-Off Points' and 'Object' as 'Drop-Off Point'. The 'Tab Style' dropdown is set to 'Train'. There are three icons in the dropdown: a yellow one, a purple one labeled 'Train', and a blue one.

1. Make sure that the Append tab to users' existing personal customizations is checked.
2. Click save

## To create a Tab: Task

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



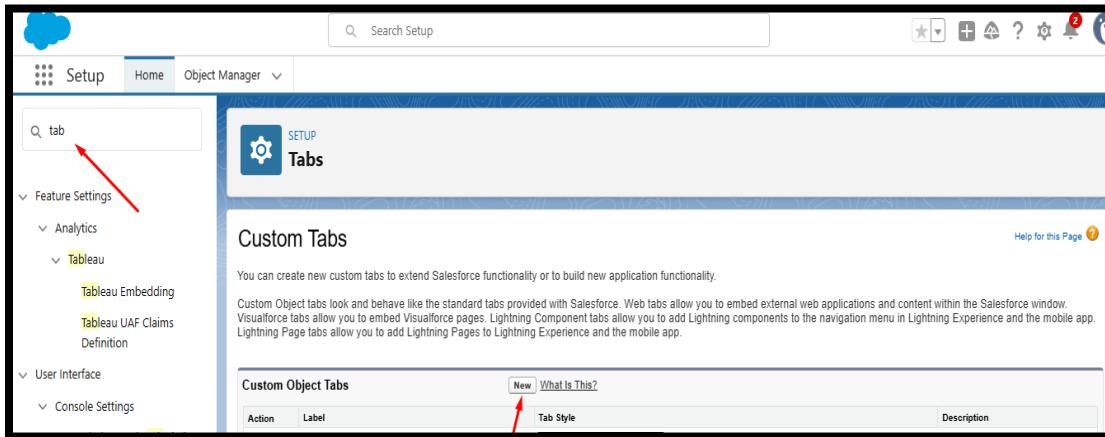
1. Select Object(Task) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab.

Action	Label	Tab Style	Description
New	Tasks	Books	

2. Make sure that the Append tab to users' existing personal customizations is checked.
3. Click save

## To create a Tab: Volunteer

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



1. Select Object(**Volunteer**) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .

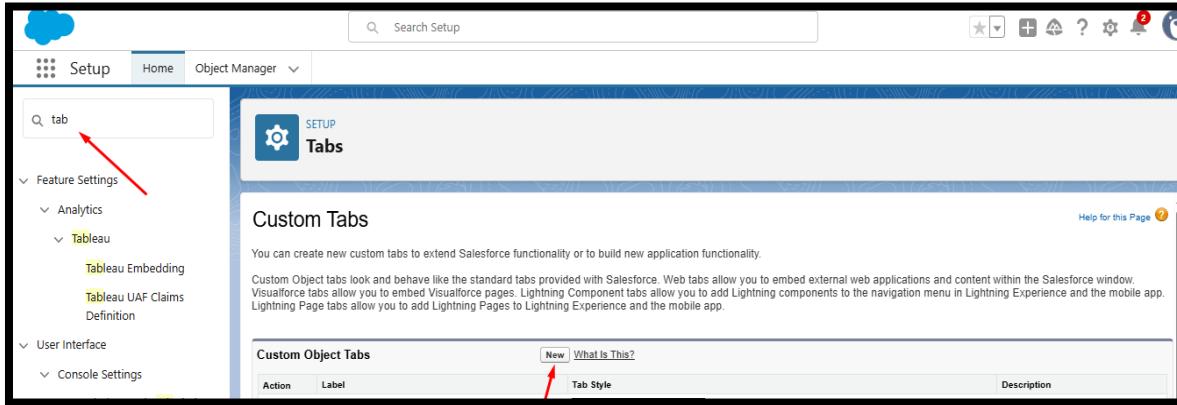
The screenshot shows the 'Edit Custom Object Tab' page for the 'Volunteers' tab. The tab label is 'Volunteers' and the object is 'Volunteer'. The tab style is set to 'Factory'. The 'Custom Tab Definition Edit' section is visible above the tab information.

Action	Label	Tab Style
New	Volunteers	Factory

2. Make sure that the Append tab to users' existing personal customizations is checked.
3. Click save

## To create a Tab: Execution Details

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



1. Select Object(**Execution Details**) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab.

The screenshot shows the 'Edit Custom Object Tab' page for the 'Execution Details' object. The title is 'Edit Custom Object Tab Execution Details'. Below the title, there is a note: 'Fill in the fields below to define the custom tab.' The main section is titled 'Custom Tab Definition Edit' and contains a 'Custom Object Tab Information' table. The table has three rows:

- Tab Label: Execution Details
- Object: Execution Detail
- Tab Style: Cell phone (with a small icon)

A red arrow points to the 'Cell phone' tab style icon.

2. Make sure that the Append tab to users' existing personal customizations is checked.
3. Click save

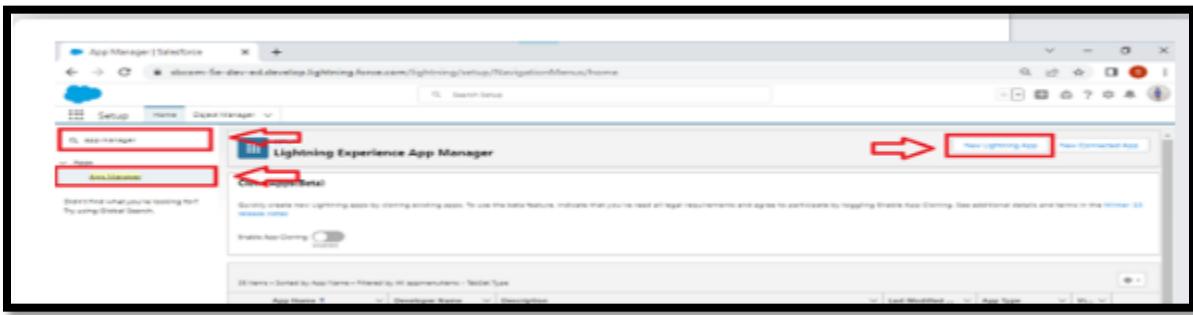
## Milestone-04

### The Lightning App

#### Create a Lightning App

##### To create a lightning app page:

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



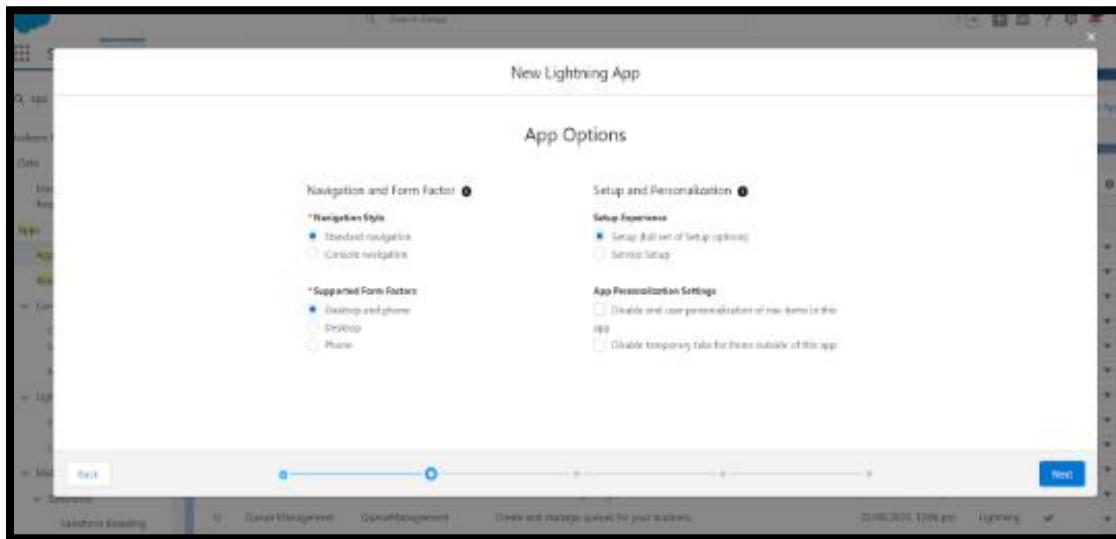
2. Fill the app name in app details and branding as follow

App Name: FoodConnect

Developer Name: This will auto populated

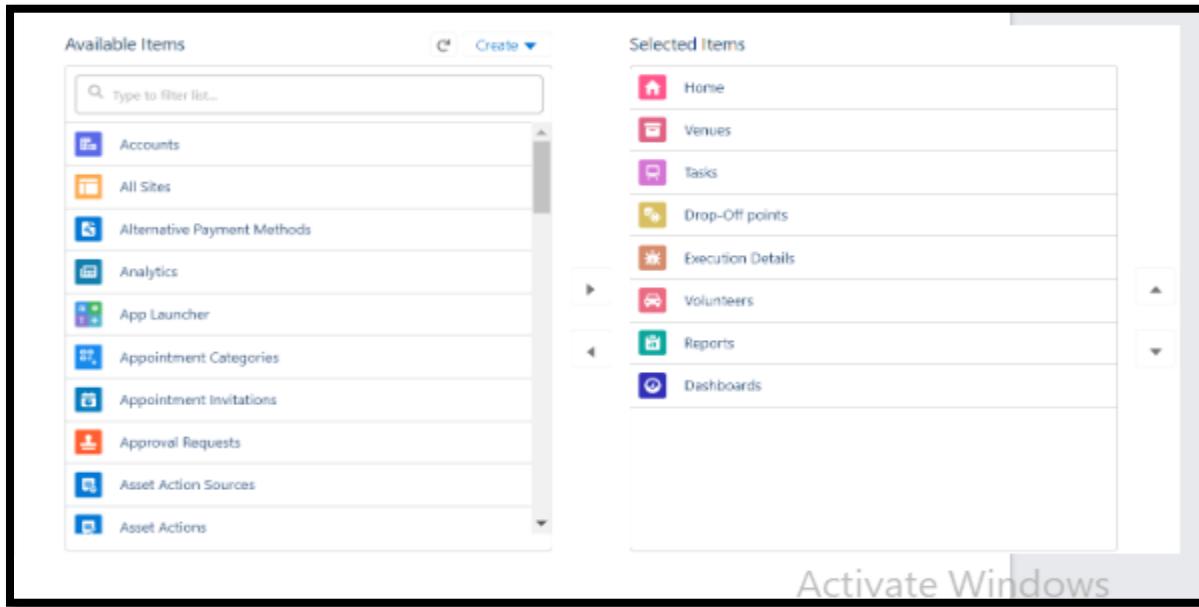
Image: optional (if you want to give any image you can otherwise not mandatory) Primary color hex value: keep this default.

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



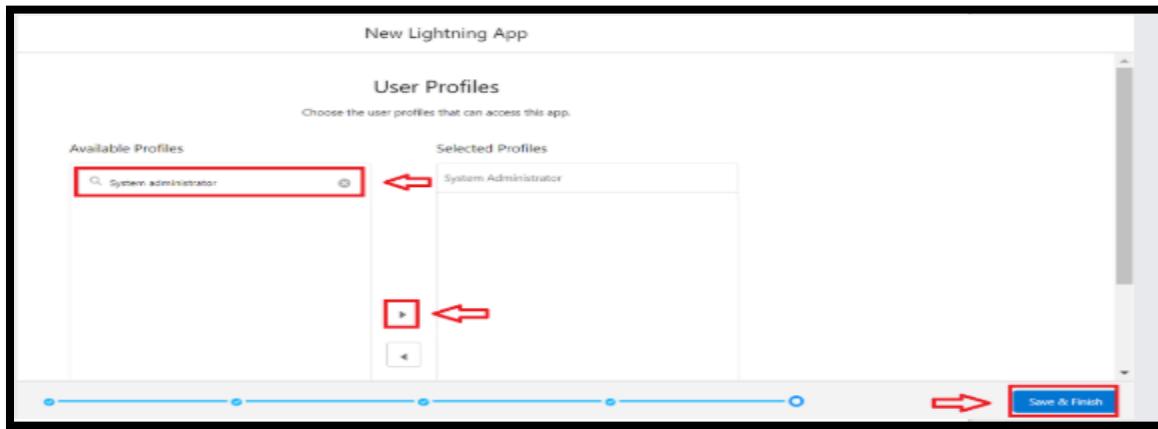
4. (Utility Items) keep it as default >> Next.

5. To Add Navigation Items:



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

6. To Add User Profiles:



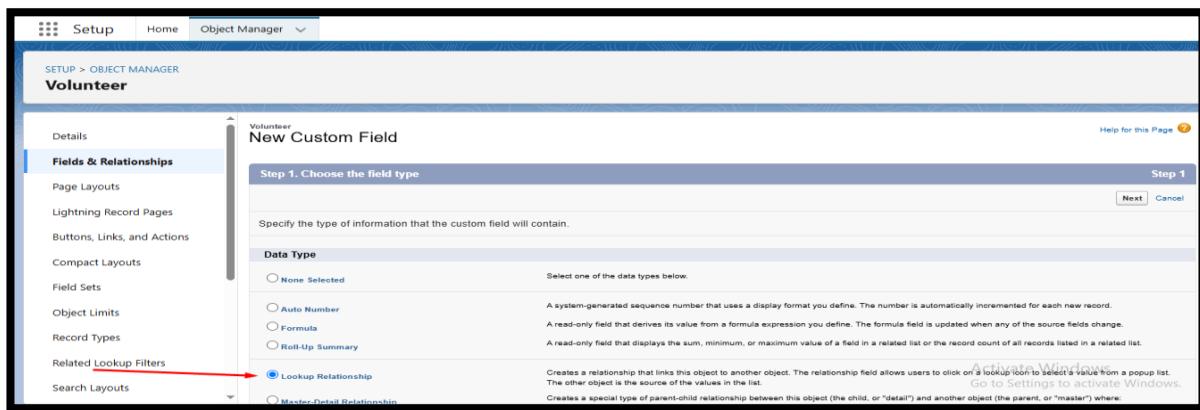
Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

## Milestone-05:

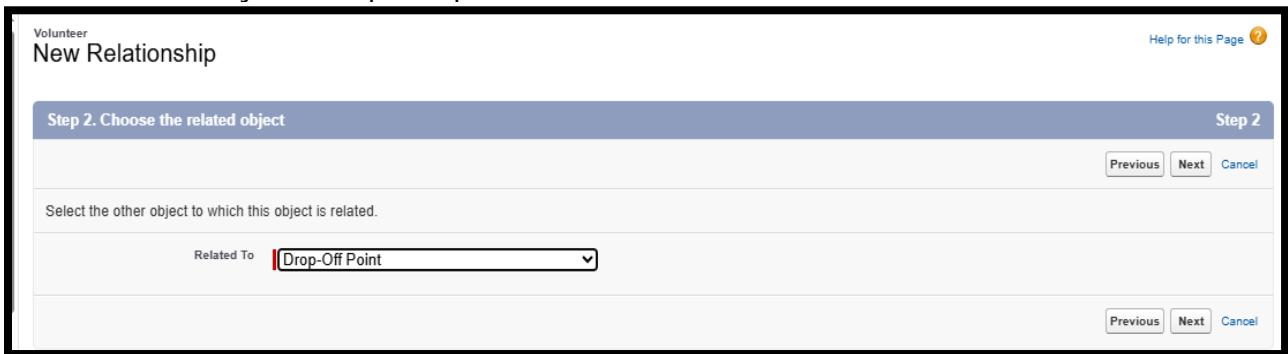
### Creation of Relationship fields in objects

#### Creation of Lookup Relationship Field on Volunteer Object :

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



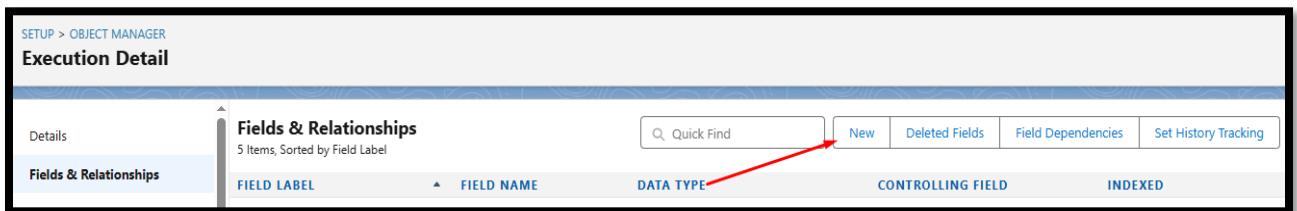
4. Select the related object "Drop-Off point" and click next.



5. Field label : Auto generated
6. Next >> Next >> Save.

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

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

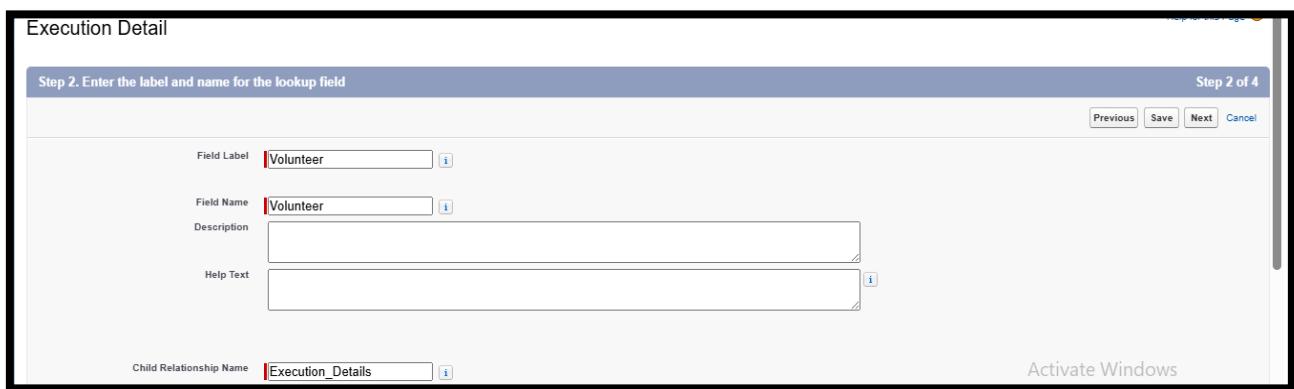


10. Select Master Detail relationship



11. Select the related object “Volunteer” and click next.

12. Field Name : Volunteer



13. Field label : Auto generated

14. Next >> Next >> Save.

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

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



17. Select Master Detail relationship
18. Select the related object “Task” and click next.
19. Field Name : Task
20. Field label : Auto generated

The screenshot shows the 'Field Information' dialog box. It contains the following fields:

- Field Label: Task
- Field Name: Task
- Description: (empty)
- Help Text: (empty)

The 'Data Type' is set to 'Master-Detail'. An information icon is located in the bottom right corner of the dialog.

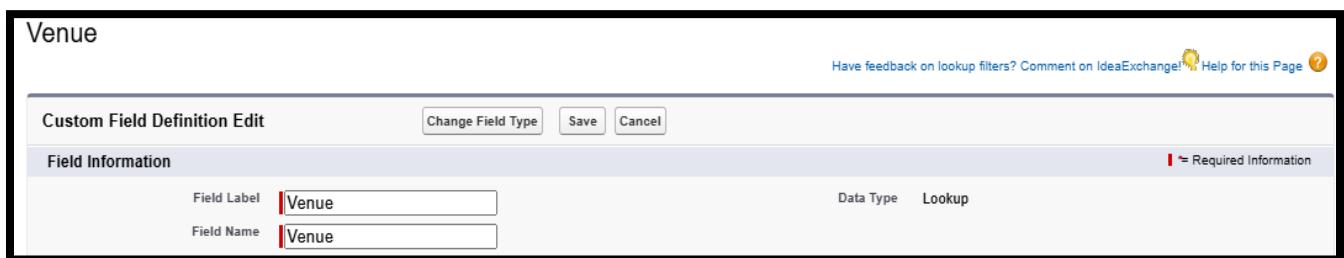
21. Next >> Next >> Save.

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

22. Go to setup >> click on Object Manager >> type object name(Drop-Off Point) in the search bar >> click on the object.
23. Now click on “Fields & Relationships” >> New



24. Select Lookup relationship
25. Select the related object “Venue” and click next.
26. Field Name : Venue
27. Field label : Venue



28. Next >> Next >> Save.

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

29. Go to setup >> click on Object Manager >> type object name(Task) in the search bar >> click on the object.
30. Now click on "Fields & Relationships" >> New



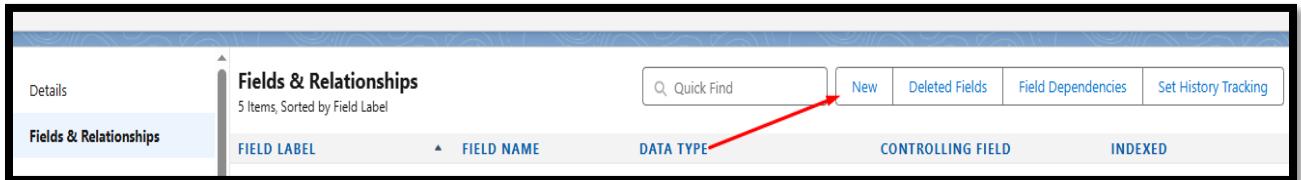
31. Select Lookup relationship
32. Select the related object "Venue" and click next.
33. Field Name : Sponsored By
34. Field label : Auto generated

A screenshot of the 'Field Information' dialog box. It contains three fields: 'Field Label' with the value 'Sponsored By', 'Field Name' with the value 'Sponsored\_By', and 'Data Type' set to 'Lookup'. There is also a 'Description' field which is empty.

35. Next >> Next >> Save.

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

36. Go to setup >> click on Object Manager >> type object name(Task) in the search bar >> click on the object.
37. Now click on "Fields & Relationships" >> New



38. Select Lookup relationship
39. Select the related object "Drop-Off point" and click next.
40. Field Name : Drop-Off point
41. Field label : Auto generated

The screenshot shows the 'Field Information' configuration screen. It includes fields for 'Field Label' (containing 'Drop-Off Point'), 'Field Name' (containing 'Drop\_Off\_Point'), 'Data Type' (set to 'Lookup'), and a large 'Description' text area which is currently empty. There are also 'Help Text' and 'Validation Rule' sections at the bottom.

42. Next >> Next >> Save.

## Creation of fields for the Venue object

1. Go to setup>> click on Object Manager >> type object name(Venue) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as a "Email" and Click on Next

The screenshot shows a list of data types. The 'Email' option is selected and highlighted with a blue border. Other options include 'None Selected', 'Auto Number', 'Checkbox', 'Currency', 'Date', 'Date/Time', and 'Email'. Each option has a brief description below it. A note at the bottom right says 'Activate Windows'.

4. Fill the Above as following:
  - Field Label : Contact Email
  - Field Name : Contact Email
  - Click on required check box

The screenshot shows the 'Step 2. Enter the details' screen. It includes fields for 'Field Label' (Contact Email), 'Field Name' (Contact\_Email), 'Description', and 'Help Text'. At the bottom, there are checkboxes for 'Required' (checked), 'Unique' (unchecked), and 'External ID' (unchecked). Navigation buttons 'Previous', 'Save', 'Next', and 'Cancel' are located at the top right.

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

## To create another fields in an object:

5. Go to setup >> click on Object Manager >> type object name(Venue) in search bar >> click on the object.
6. Now click on "Fields & Relationships" >> New



7. Select Data type as a "Phone" and Click on Next

8. Fill the Above as following:

- Field Label : Contact Phone
- Field Name : Contact Phone

A screenshot of the 'Field Information' page. It shows a form with the following fields:

- Field Label: Contact Phone
- Field Name: Contact\_Phone
- Description: (empty)
- Help Text: (empty)
- Data Type: Phone

- Click on required check box

A screenshot of the 'General Options' page. It shows a checkbox labeled 'Always require a value in this field in order to save a record' which is checked.

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

## To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Venue) in search bar >>click on the object.
2. Now click on "Fields & Relationships" >> New



3. Select Data type as a "Geolocation" and Click on Next
4. Fill the Above as following:
  - Field Label : Location
  - Field Name : Location

A screenshot of the 'Field Information' dialog. It shows a form with three fields: 'Field Label' (Location), 'Field Name' (Location), and 'Description' (Enter the Geolocation of your Venue). To the right, it shows the 'Data Type' as 'Geolocation'.

- Description : Enter the Geolocation of your Venue
- Decimal Places : 4

A screenshot of the 'Geolocation Options' dialog. It has two radio buttons: 'Degrees, Minutes, Seconds' (selected) and 'Decimal'. Below is a 'Decimal Places' input field containing '4'. At the bottom are 'Save' and 'Cancel' buttons, and links for 'Activate' and 'Go to Settings'.

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

## To create another fields in an object:

9. Go to setup >> click on Object Manager >> type object name(Venue) in search bar >> click on the object.
10. Now click on "Fields & Relationships" >> New

The screenshot shows the 'Fields & Relationships' page in the Salesforce setup. The top navigation bar includes 'Details', 'Fields & Relationships', 'Quick Find', 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. Below the navigation is a table header with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. A red arrow points to the 'New' button in the top right corner of the header.

11. Select Data type as a "Long Text Area" and Click on Next

12. Fill the Above as following:

- Field Label : Venue Location
- Field Name : Venue\_Location

The screenshot shows the 'Field Information' configuration screen. It has sections for 'Field Label' (set to 'Venue Location'), 'Field Name' (set to 'Venue\_Location'), and 'Data Type' (set to 'Long Text Area'). There is also a 'Description' section which is currently empty.

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

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

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

2. Now click on "Fields & Relationships" >> New

The screenshot shows the 'Fields & Relationships' page in the Salesforce Object Manager. The top navigation bar includes 'Details', 'Fields & Relationships', 'Quick Find', 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. Below the navigation is a table header with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. A red arrow points to the 'New' button in the top right corner of the table header area.

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

4. Fill the Above as following:

- Field Label : Location 2
- Field Name : gets auto generated
- Description : Enter the Geolocation of the Drop off Point

The screenshot shows the 'Field Information' dialog box. It contains three fields: 'Field Label' with the value 'Location 2', 'Field Name' with the value 'Location\_2', and 'Description' with the value 'Enter the Geolocation of the Drop off Point'. To the right of these fields, it says 'Data Type' followed by 'Geolocation'.

- Geolocation Options : select Decimal
- Decimal Places : 4

The screenshot shows the 'Geolocation Options' dialog box. It has two radio buttons: 'Degrees, Minutes, Seconds' (unchecked) and 'Decimal' (checked). Below the radio buttons is a 'Decimal Places' input field containing the value '4'. At the bottom are 'Save' and 'Cancel' buttons.

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

## To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Drop-Off point) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New

The screenshot shows the 'Fields & Relationships' section of the Salesforce setup. The top navigation bar includes 'Details', 'Fields & Relationships', 'Quick Find' (with a magnifying glass icon), 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. Below this, there's a table header with columns: FIELD LABEL, FIELD NAME, DATA TYPE (which has a red arrow pointing to it), CONTROLLING FIELD, and INDEXED. The table body shows 5 items, sorted by Field Label.

3. Select Data type as a "Formula" and Click on Next
4. Fill the Above as following:
  - Field Label : distance calculation
  - Field Name : distance\_calculation

The screenshot shows the 'Field Information' step of the formula creation wizard. It includes fields for 'Field Label' (set to 'distance calculation'), 'Field Name' (set to 'distance\_calculation'), and a 'Description' field. A note at the top right indicates 'Required Info'.

- Formula Return Type : Number
- Formula Options : DISTANCE( Location\_2\_\_c , Venue\_\_r.Location\_\_c , 'km')

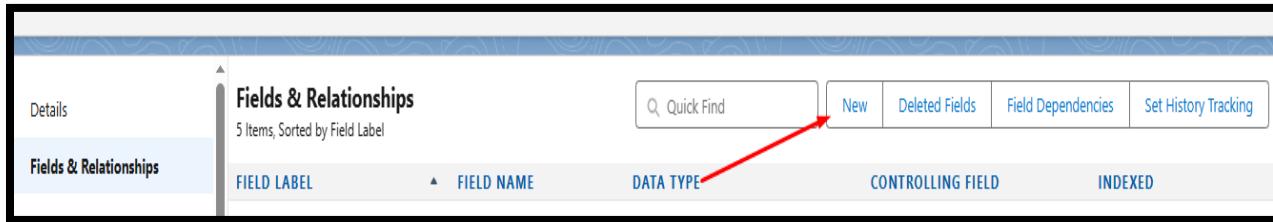
The screenshot shows the 'Formula Options' step of the formula creation wizard. It displays the formula 'DISTANCE( Location\_2\_\_c , Venue\_\_r.Location\_\_c , 'km')'. Other settings include 'Formula Return Type' (Number), 'Decimal Places' (2), and 'Select Field Type' (Drop-Off Point). A 'Simple Formula' tab is selected. A 'Quick Tips' sidebar provides links to 'Getting Started' and 'Operators & Functions'.

The screenshot shows the 'Check Syntax' step of the formula creation wizard. It displays a green message: 'No syntax errors in merge fields or functions. (Compiled size: 570 characters)'. At the bottom are 'Save', 'Quick Save', and 'Cancel' buttons.

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

## To create another fields in an object:

5. Go to setup >> click on Object Manager >> type object name(Drop-Off point) in search bar >> click on the object.
6. Now click on "Fields & Relationships" >> New



7. Select Data type as a "Picklist" and Click on Next
8. Fill the Above as following:
  - Field Label : State
  - Field Name : State
  - Enter values, with each value separated by a new line :  
Andhra Pradesh  
Arunachal Pradesh  
Assam  
Bihar  
Chhattisgarh  
Goa  
Gujarat  
Haryana  
Himachal Pradesh  
Jharkhand  
Karnataka  
Kerala  
Maharashtra  
Madhya Pradesh  
Manipur  
Meghalaya  
Mizoram  
Nagaland  
Odisha  
Punjab  
Rajasthan

Sikkim  
Tamil Nadu  
Tripura  
Telangana  
Uttar Pradesh  
Uttarakhand  
West Bengal  
Andaman & Nicobar (UT)  
Chandigarh (UT)  
Dadra & Nagar Haveli and Daman & Diu (UT)  
Delhi [National Capital Territory (NCT)]  
Jammu & Kashmir (UT)  
Ladakh (UT)  
Lakshadweep (UT)  
Puducherry (UT)

Field Label  [i](#)

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

Andhra Pradesh  
Arunachal Pradesh  
Assam  
Bihar  
Chhattisgarh  
Goa

Display values alphabetically, not in the order entered  
 Use first value as default value [i](#)  
 Restrict picklist to the values defined in the value set [i](#)

Field Name  [i](#)

Description

Activate Windows  
Go to Settings to activate W

- Click on required check box

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 [i](#)

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

## To create another fields in an object:

9. Go to setup >> click on Object Manager >> type object name(Drop\_Off Point) in search bar >> click on the object.
10. Now click on “Fields & Relationships” >> New

The screenshot shows the 'Fields & Relationships' page in Salesforce. On the left, there's a sidebar with 'Details' and 'Fields & Relationships'. The main area has a title 'Fields & Relationships' with a subtitle '5 Items, Sorted by Field Label'. Below is a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The 'DATA TYPE' column header is highlighted with a red arrow pointing to it from the top right.

11. Select Data type as a “Number” and Click on Next

12. Fill the Above as following:

- Field Label : Distance
- Field Name : Distance

The screenshot shows the 'Field Information' dialog. It has sections for 'Field Label' (Distance), 'Field Name' (Distance), and 'Data Type' (Number). The 'Required' checkbox is checked. There's also a 'Description' section with a large text input field.

- Length : 14
- Decimal Places : 4
- Click on required check box

The screenshot shows the 'General Options' and 'Number Options' sections of the field configuration. In 'General Options', the 'Required' checkbox is checked. In 'Number Options', the 'Length' is set to 14 and 'Decimal Places' is set to 4. There's also a note about formula syntax at the bottom of the 'Number Options' section.

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

## To create fields in an object:

9. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
10. Now click on "Fields & Relationships" >> New

The screenshot shows the 'Fields & Relationships' page in Salesforce. At the top right, there is a 'New' button, which is highlighted with a red arrow. Below it are other buttons: 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. The main area displays a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. There are 5 items listed, sorted by Field Label.

11. Select Data type as a "Number" and Click on Next

12. Fill the Above as following:

- Field Label : Distance
- Field Name : Distance

The screenshot shows the 'Field Information' screen. It has fields for 'Field Label' (set to 'Distance') and 'Field Name' (set to 'Distance'). To the right, it shows 'Data Type' as 'Number'. There is also a 'Description' field which is empty.

- Length : 14
- Decimal Places : 4
- Click on required check box

The screenshot shows the 'General Options' and 'Number Options' sections of the field configuration. In 'General Options':

- 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

In 'Number Options':

- Length: 14
- Decimal Places: 4

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

## Creation of fields for the Task object

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

2. Now click on "Fields & Relationships" >> New

The screenshot shows the 'Fields & Relationships' page for the Task object. At the top right, there is a 'New' button, which is highlighted with a red arrow. Other buttons include 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. The page displays 5 items, sorted by Field Label. The columns are labeled 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'.

3. Select Data type as a "Auto Number" and Click on Next

4. Fill the Below as following:

- Field Label : Task ID
- Display Format : TASK-{0}
- Starting Number : 1
- Field Name : gets auto generated

The screenshot shows the 'New Custom Field' configuration page, Step 2 of 4. The form fields are as follows:  
Field Label: Task ID  
Display Format: TASK-{0} (with an example: A-{0000})  
Starting Number: 1  
Field Name: Task\_ID  
Description: (empty)  
Help Text: (empty)  
External ID: (checkbox) Set this field as the unique record identifier from an external system

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

## To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New



3. Select Data type as a "Date" and Click on Next
4. Fill the Above as following:

A screenshot of the 'Field Information' dialog box. It shows a 'Field Label' input field containing 'Date' and a 'Data Type' dropdown set to 'Date'. Below it is a 'Field Name' input field also containing 'Date'. There is a 'Description' text area which is currently empty. The entire dialog box is highlighted with a black border.

- Field Label : Date
- Field Name : Date
- Click on required check box

A screenshot of the 'General Options' dialog box. Under the 'Required' section, there is a checked checkbox labeled 'Always require a value in this field in order to save a record'. Below it is a 'Default Value' section with a 'Show Formula Editor' button. A note below the formula editor says: 'Use formula syntax: Enclose text and picklist value API names in double quotes: ("the\_text"), include numbers without quotes: (2), 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}RecordAPIName.FieldName\_c'.

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

## To create another fields in an object:

5. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
6. Now click on "Fields & Relationships" >> New

The screenshot shows the 'Fields & Relationships' section of the Salesforce setup. The top navigation bar includes 'Details', 'Fields & Relationships', 'Quick Find', 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. Below the navigation is a table header with columns: FIELD LABEL, FIELD NAME, DATA TYPE (which has a red arrow pointing to it), CONTROLLING FIELD, and INDEXED. The table body shows 5 items, sorted by Field Label.

7. Select Data type as a “Picklist (Multi-Select)” and Click on Next
8. Fill the Above as following:

- Field Label : Food Category
- Field Name : Food Category
- Enter values, with each value separated by a new line :
  - Veg
  - Non-Veg
  - Salad
  - Snack

The screenshot shows the 'New Custom Field' configuration page for the 'Food Category' field. It's Step 2 of 4. The 'Field Label' is set to 'Food Category'. Under 'Values', the 'Enter values, with each value separated by a new line' option is selected, and a text area contains the values 'Veg', 'Non-Veg', 'Salad', and 'Snack'. There are also several checkboxes at the bottom left: 'Display values alphabetically, not in the order entered', 'Use first value as default value', and 'Distinct picklist to the values defined in the value set'. On the right, there's a note about activating Windows.

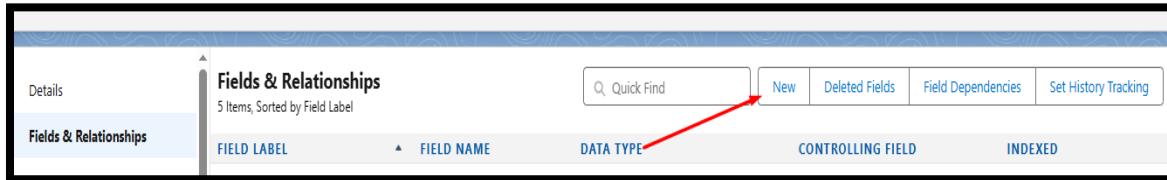
- Click on required check box

The screenshot shows the 'New Custom Field' configuration page for the 'Food Category' field. It's Step 3 of 4. The 'Field Name' is 'Food\_Category'. Under 'Description' and 'Help Text', there are large text input areas. At the bottom, there are two checked checkboxes: 'Always require a value in this field in order to save a record' and 'Add this field to existing custom report types that contain this entity'.

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

## To create another fields in an object:

9. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
10. Now click on "Fields & Relationships" >> New



11. Select Data type as a "Number" and Click on Next

12. Fill the Above as following:

- Field Label : Number of People Served
- Field Name : Number\_of\_People\_Served

A screenshot of the 'Field Information' page. It shows the following fields:

- Field Label: Number of People Served
- Field Name: Number\_of\_People\_Served
- Description: (empty)
- Help Text: (empty)
- Data Type: Number

- Click on required check box

A screenshot of the 'General Options' page. The 'Required' checkbox is checked, indicating that a value must be provided for this field. Other options shown include 'Unique', 'External ID', and 'AI Prediction'.

General Options	
Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record
Unique	<input type="checkbox"/> Do not allow duplicate values
External ID	<input type="checkbox"/> Set this field as the unique record identifier from an external system
AI Prediction	<input type="checkbox"/> Use this field to store AI prediction scores

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

## To create another fields in an object:

13. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
14. Now click on "Fields & Relationships">> New

The screenshot shows the 'Fields & Relationships' page in Salesforce. The top navigation bar includes 'Details', 'Fields & Relationships', 'Quick Find', 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. Below the navigation is a table header with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. A red arrow points to the 'New' button in the top right corner of the page area.

15. Select Data type as a “Text” and Click on Next

16. Fill the Above as following:

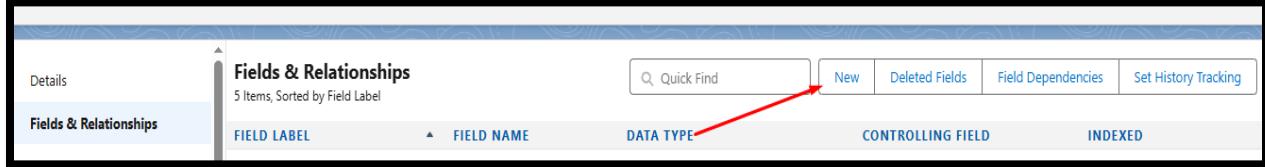
- Field Label : Name of the Person
- Field Name : Name\_of\_the\_Person

The screenshot shows the 'Field Information' dialog box. It contains three fields: 'Field Label' with the value 'Name of the Person', 'Field Name' with the value 'Name\_of\_the\_Person', and 'Data Type' set to 'Text'. There is also a 'Description' field which is empty.

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

## To create another fields in an object:

17. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
18. Now click on "Fields & Relationships" >> New



19. Select Data type as a "Phone" and Click on Next

20. Fill the Above as following:

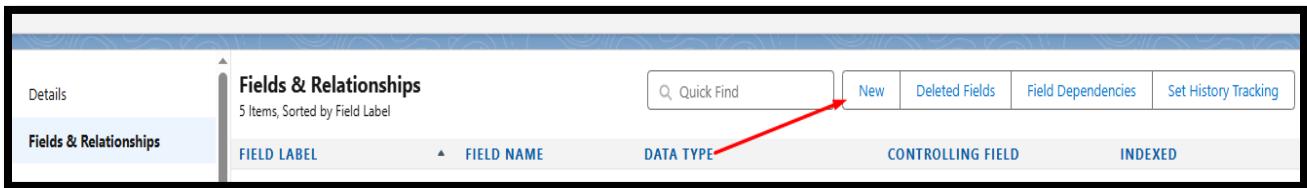
- Field Label : Phone
- Field Name : Phone

A screenshot of the 'Field Information' dialog box. It contains fields for 'Field Label' (set to 'Phone'), 'Field Name' (set to 'Phone'), 'Data Type' (set to 'Phone'), and a 'Description' field which is empty.

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

## To create another fields in an object:

21. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
22. Now click on "Fields & Relationships" >> New



23. Select Data type as a "Picklist" and Click on Next

24. Fill the Above as following:

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

1  
2  
3  
4  
5

A screenshot of the 'Step 2. Enter the details' screen. The field label is set to 'Rating'. Under 'Values', the 'Enter values, with each value separated by a new line' option is selected. The input area contains the values 1, 2, 3, 4, and 5, each on a new line. There are two checkboxes at the bottom: 'Display values alphabetically, not in the order entered' (unchecked) and 'Use first value as default value' (unchecked). The top right corner shows 'Step 2 of 3' and navigation buttons for 'Previous', 'Next', and 'Cancel'.

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

## To create another fields in an object:

25. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
26. Now click on "Fields & Relationships" >> New



27. Select Data type as a "Long Text Area" and Click on Next

28. Fill the Above as following:

- Field Label : Feedback
- Field Name : Feedback

A screenshot of the 'Field Information' dialog box. It shows the following fields:

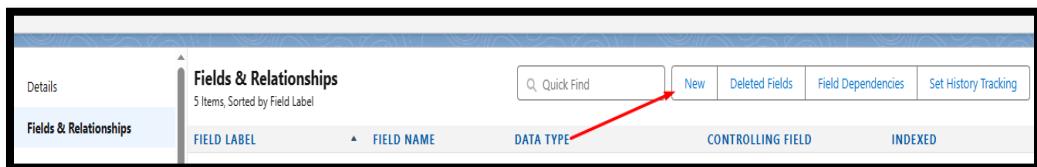
- Field Label: Feedback
- Field Name: Feedback
- Description: (empty)
- Data Type: Long Text Area

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

## Creation of fields for the Volunteer object

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

2. Now click on "Fields & Relationships" >> New



3. Select Data type as a "Auto Number" and Click on Next

4. Fill the Above as following:

- Field Label : Volunteer ID
- Field Name : gets auto generated

A screenshot of the 'Field Information' dialog box. It shows the following fields:

- Field Label: Volunteer ID
- Field Name: Volunteer\_ID
- Data Type: Auto Number
- Description: (empty)
- Help Text: (empty)

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

## To create another fields in an object:

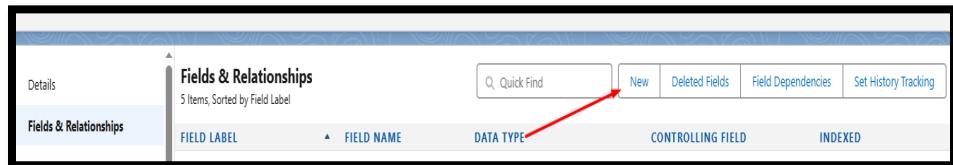
1. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as a "Picklist" and Click on Next
4. Fill the Above as following:
  - Field Label : Gender
  - Field Name : Gender
  - Enter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

The screenshot shows the 'New Custom Field' wizard, Step 2. Enter the details. The field label is 'Gender'. The 'Enter values, with each value separated by a new line' radio button is selected. The values entered are 'Female' and 'Male'.

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

## To create another fields in an object:

5. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
6. Now click on "Fields & Relationships" >> New



7. Select Data type as a "Date" and Click on Next

8. Fill the Above as following:

- Field Label : Available On
- Field Name : Available On

A screenshot of the 'Field Information' dialog. It shows two input fields: 'Field Label' containing 'Available On' and 'Field Name' containing 'Available\_On'. To the right, it shows 'Data Type' set to 'Date'. There is also a 'Description' field which is empty.

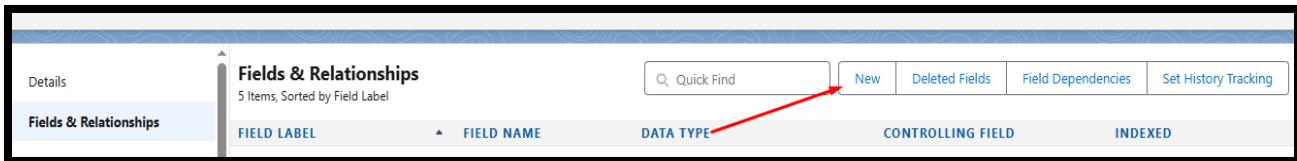
- Click on required check box

A screenshot of the 'General Options' dialog. Under the 'Required' section, there is a checked checkbox labeled 'Always require a value in this field in order to save a record'. Under the 'Default Value' section, there is a link labeled 'Show Formula Editor'.

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

## To create another fields in an object:

9. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
10. Now click on "Fields & Relationships" >> New



11. Select Data type as a "Number" and Click on Next

12. Fill the Above as following:

- Field Label : Age
- Field Name : Age

A screenshot of the 'Field Information' page. It shows the following fields:

- Field Label: Age
- Field Name: Age
- Description: (empty)
- Data Type: Number

- Click on required check box

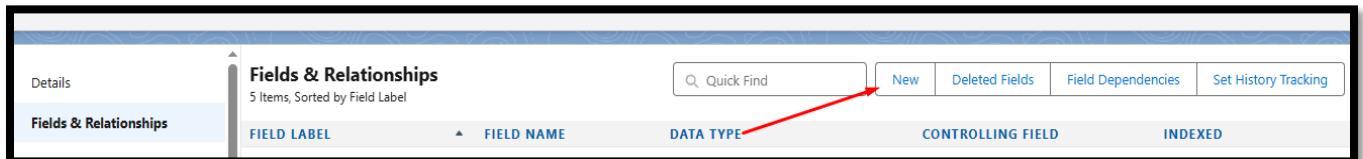
A screenshot of the 'General Options' page. It shows the following settings:

Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record
Unique	<input type="checkbox"/> Do not allow duplicate values
External ID	<input type="checkbox"/> Set this field as the unique record identifier from an external system
AI Prediction	<input type="checkbox"/> Use this field to store AI prediction scores

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

## To create another fields in an object:

13. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
14. Now click on "Fields & Relationships" >> New



15. Select Data type as a "Email" and Click on Next

16. Fill the Above as following:

- Field Label : Email
- Field Name : Email

A screenshot of the Field Information screen. It shows a table with three rows: 'Field Label' containing 'Email', 'Field Name' containing 'Email', and 'Description' which is empty. To the right of the table, it says 'Data Type' and 'Email'.

- Click on required check box

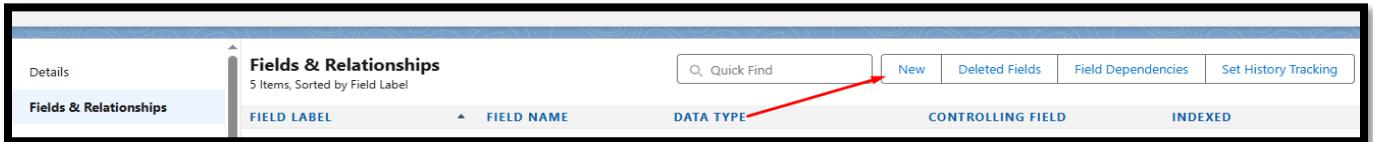
A screenshot of the General Options screen. It includes several checkboxes:

- 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
- Default Value: [Show Formula Editor](#)

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

## To create another fields in an object:

17. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
18. Now click on "Fields & Relationships" >> New



19. Select Data type as a "Number" and Click on Next

20. Fill the Above as following:

- Field Label : Contact Number
- Field Name : Contact\_Number

A screenshot of the Field Information page for a new field. It shows the following details:  
Field Label: Contact Number  
Field Name: Contact\_Number  
Data Type: Number  
Description: (empty)  
A red box highlights the 'Contact Number' field name.

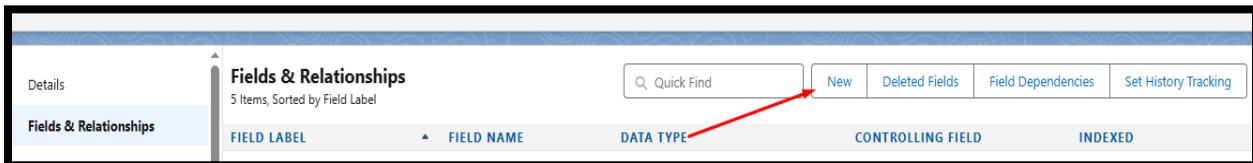
- Click on required check box

A screenshot of the General Options page. It contains the following settings:  
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  
A red box highlights the 'Always require a value in this field in order to save a record' checkbox.

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

## To create another fields in an object:

21. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
22. Now click on "Fields & Relationships" >> New



23. Select Data type as a "Long Text Area " and Click on Next

24. Fill the Above as following:

- Field Label : Address
- Field Name : Address

A screenshot of the 'Field Information' dialog box. It shows the following fields:

- Field Label: Address
- Field Name: Address
- Description: (empty)
- Data Type: Long Text Area

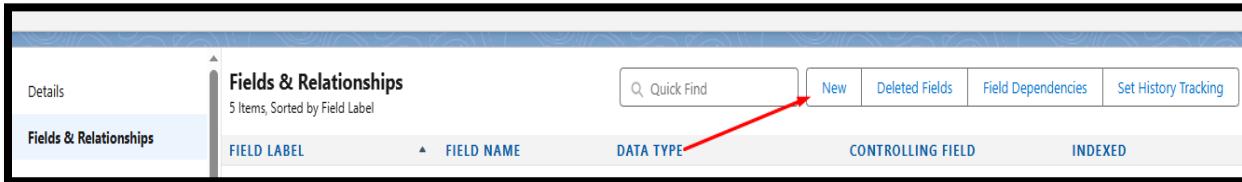
The 'Data Type' field is highlighted with a red border. A small red icon with the text '= Req' is located in the top right corner of the dialog.

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

## To create another field in an object:

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

26. Now click on "Fields & Relationships" >> New



27. Select Data type as a "Date" and Click on Next

28. Fill the Above as following:

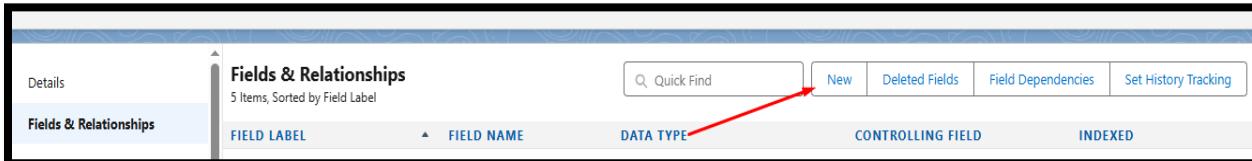
- Field Label : Date of Birth
- Field Name : Date\_of\_Birth

A screenshot of the 'Field Information' dialog box. It shows a form with three fields: 'Field Label' containing 'Date of Birth', 'Field Name' containing 'Date\_of\_Birth', and 'Data Type' set to 'Date'. Below these, there is a 'Description' field which is empty.

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

## To create another field in an object:

5. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
6. Now click on "Fields & Relationships" >> New



7. Select Data type as a "Text" and Click on Next

8. Fill the Above as following:

- Field Label : Owner Name
- Field Name : Owner Name

The 'Field Information' section of the field creation wizard. It shows the following fields:

- Field Label: Owner Name
- Field Name: Owner\_Name
- Description: (empty)
- Data Type: Text

- Length Size: 20

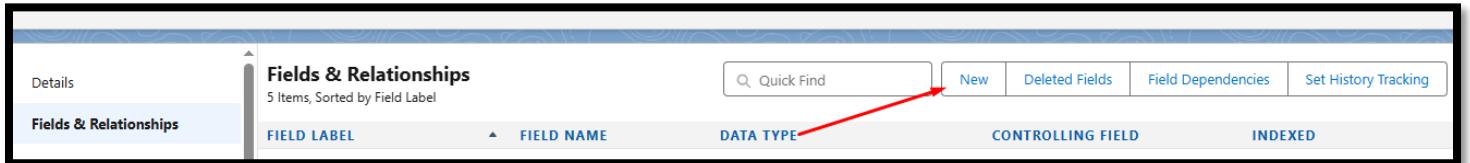
The 'Text Options' section of the field creation wizard. It shows the following field:

- Length: 20

- Click on Next >> Next >> Save

## Creation of fields for the Execution Details object

- 1.Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New



3. Select Data type as a "Auto Number" and Click on Next

4. Fill the Above as following:

- Field Label : Execution ID
- Field Name : gets auto generated

A screenshot of the 'Field Information' dialog box. It shows the following fields:

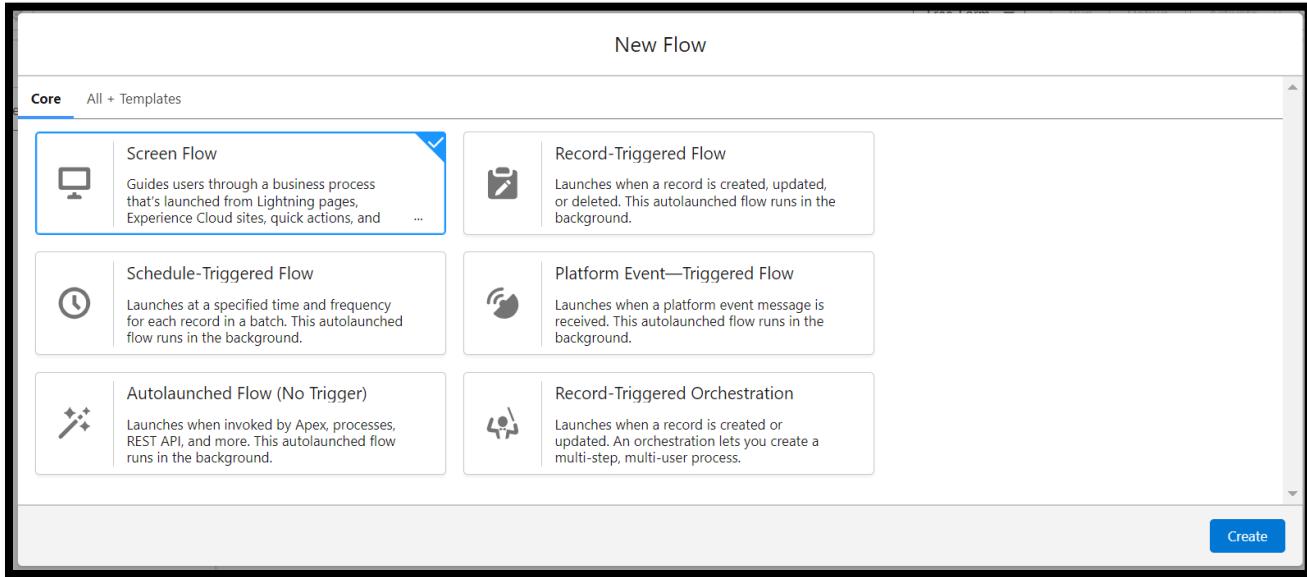
- Field Label: Execution ID
- Field Name: Execution\_ID
- Description: (empty)
- Data Type: Auto Number

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

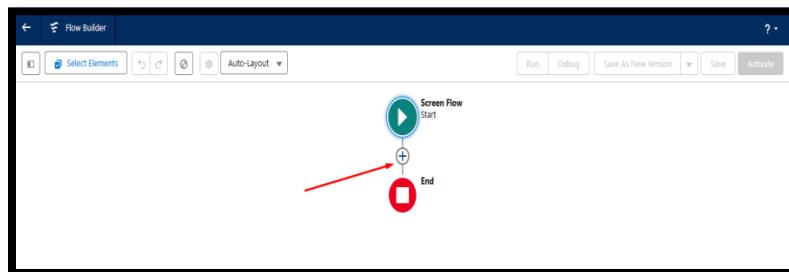
## Milestone-06:

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

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



3. Click on the '+' icon in between start and end, and click on screen element.

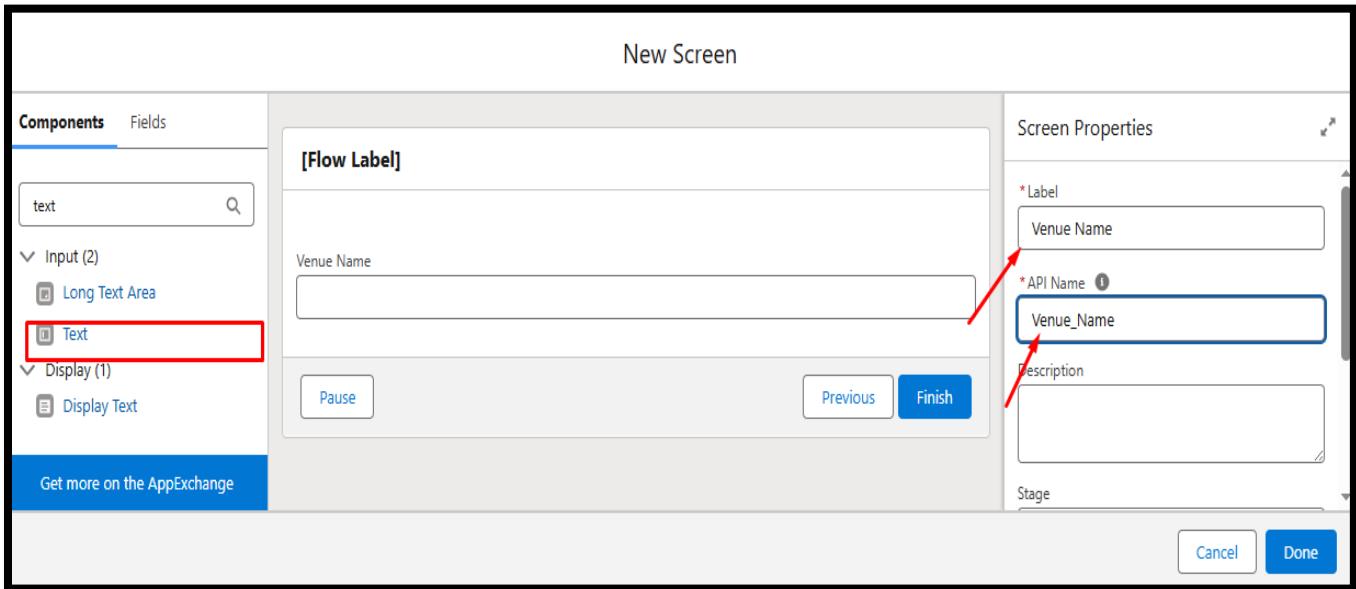


3. Under the Screen Properties:

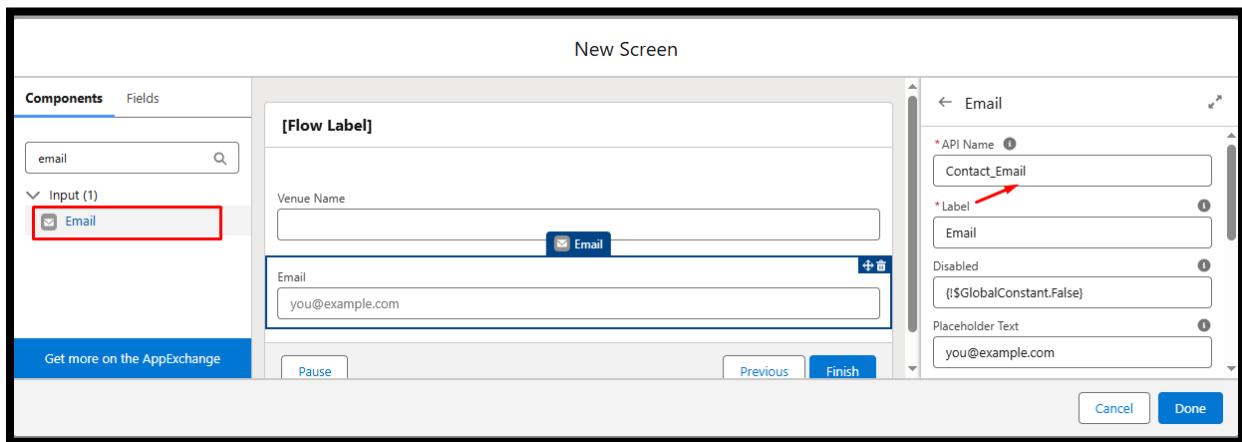
Label : Venue Details

API Name :Venue\_Details

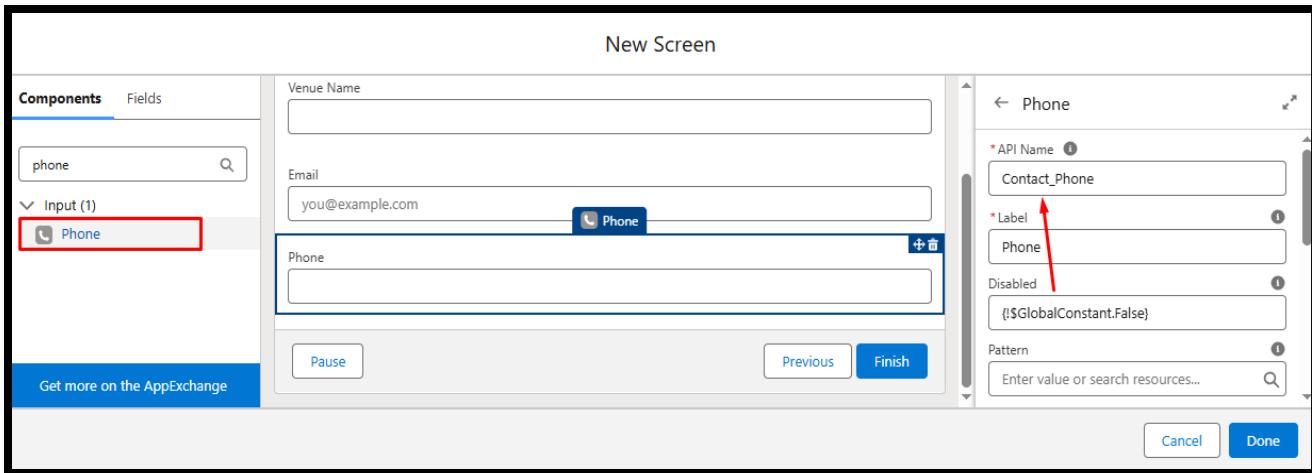
5. Now Lets add components in this flow. Click on Text Component and name it as:
- Label : Venue Name
  - API Name : Venue\_Name



6. Click on Email Component and name it as:
- Label : Email
  - API Name : Contact\_Email

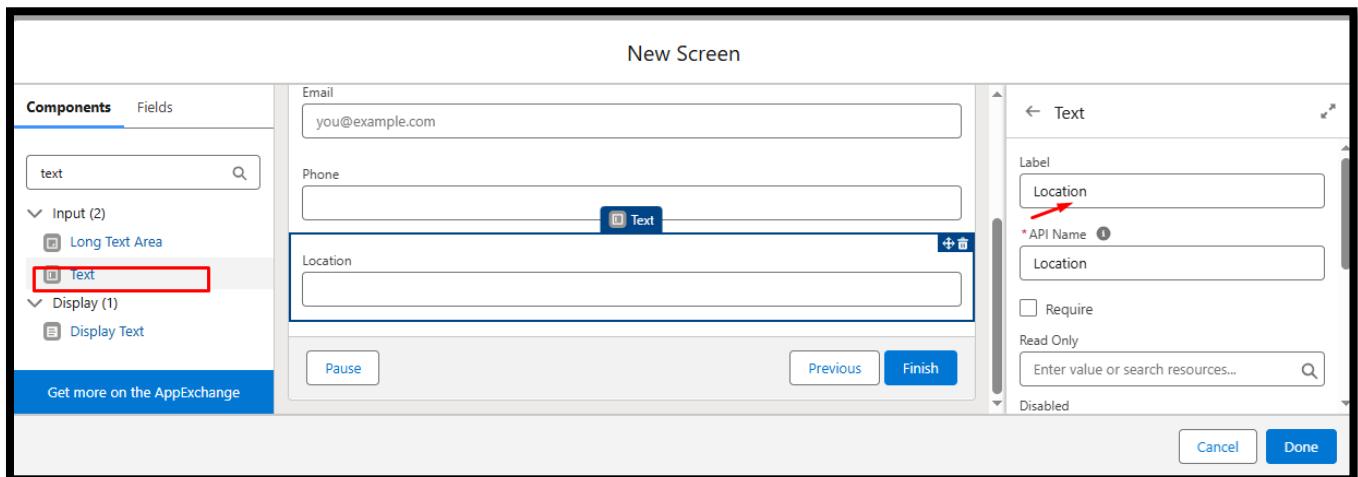


7. Click on Phone Component and name it as:
- Label : Phone
  - API Name : Contact\_Phone



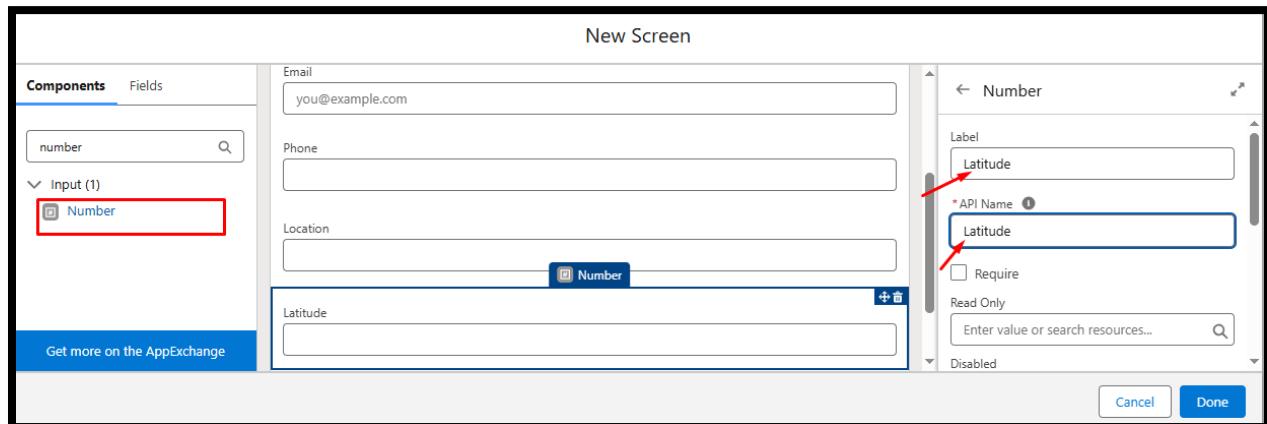
8. Click on Text Component and name it as:

- Label : Location
- API Name : Location



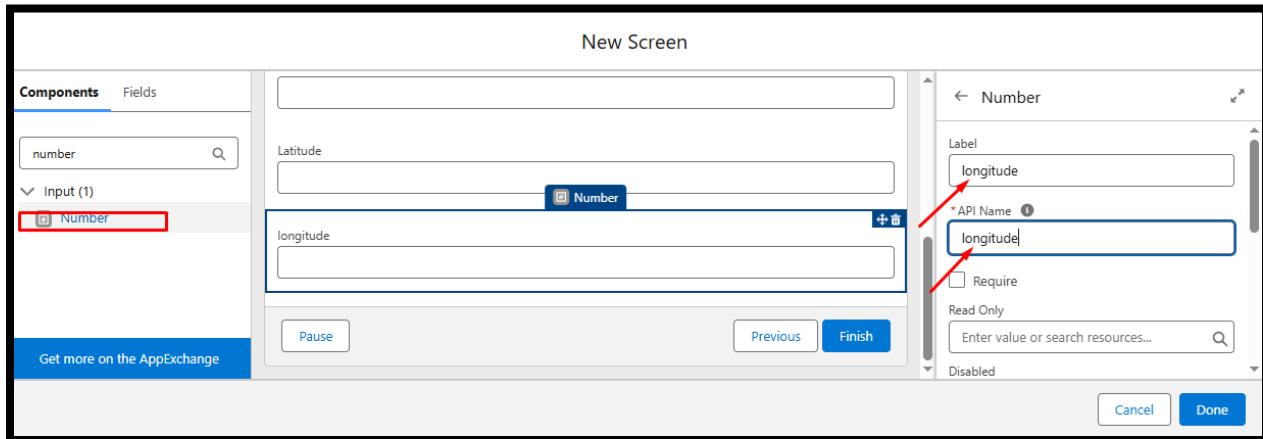
9. Click on Number Component and name it as:

- Label : Latitude
- API Name : Latitude

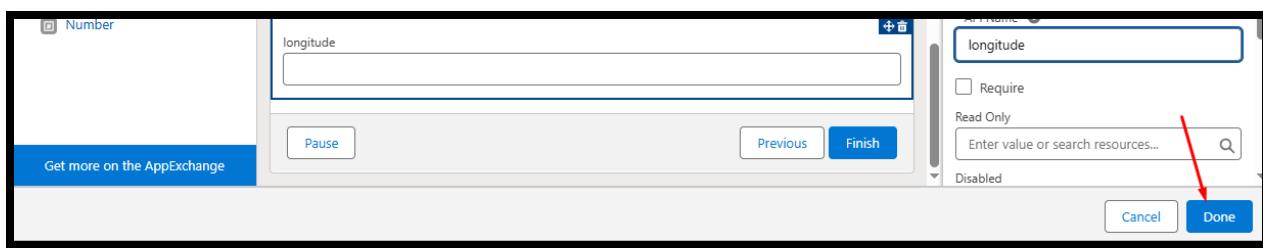


10. Click on Number Component and name it as:

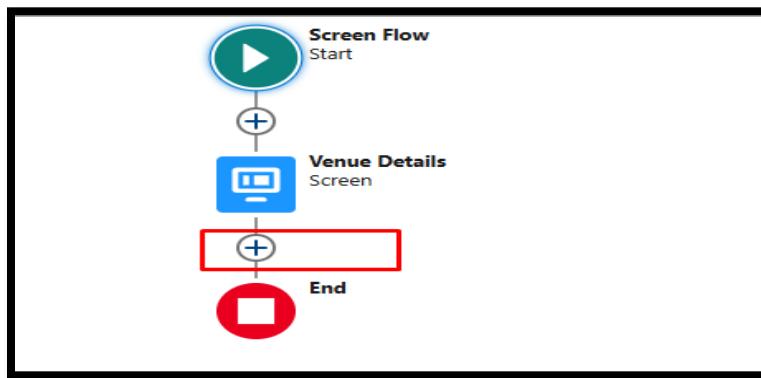
- Label : longitude
- API Name : longitude



Next click on Done. This would like below.

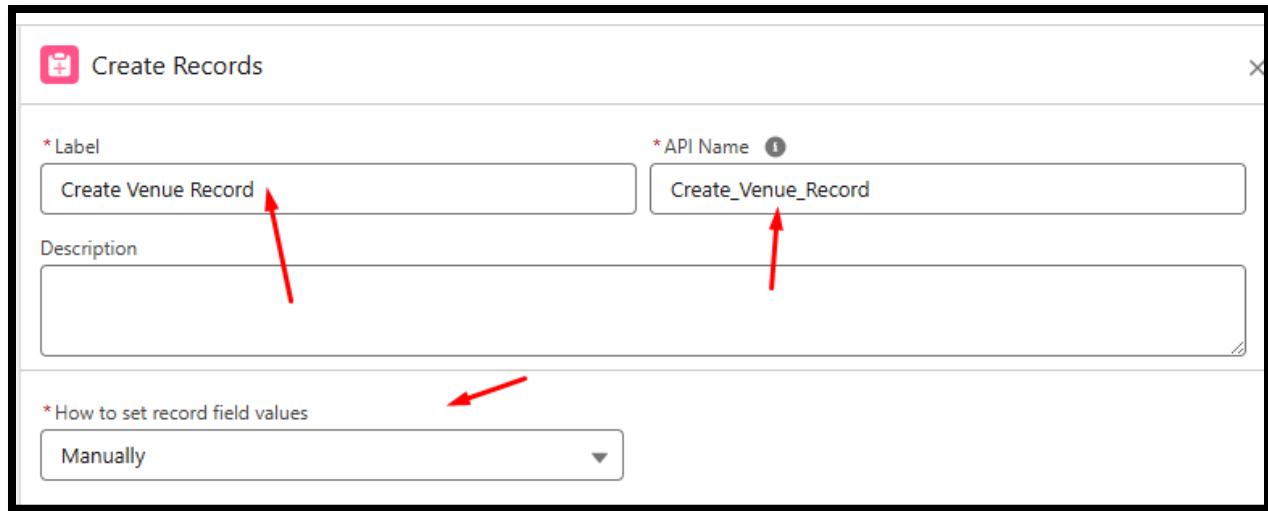


12. Click on the '+' icon in between Venue details and end, and click on create record element.

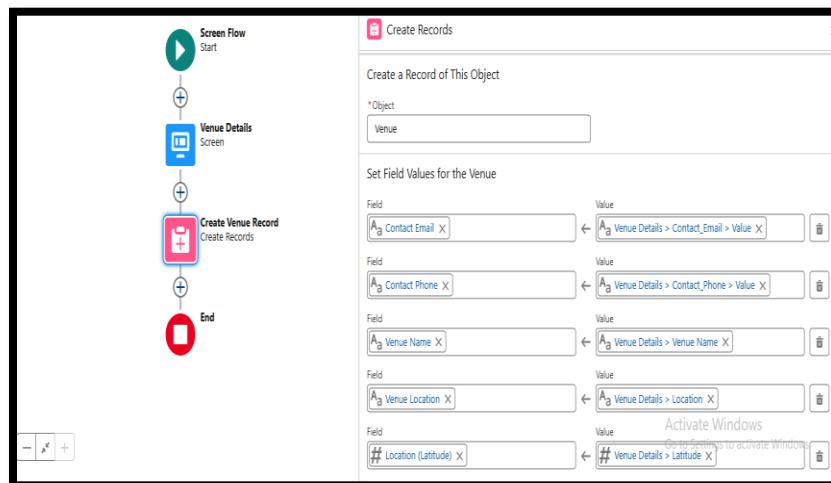


13. Now label it as

- Label : Create Venue Record
- API Name : Create\_Venue\_Record
- Set field values: Manually



- How Many Records to Create : One
- How to Set the Record Fields : Use separate resources, and literal values
- Object : Venue
- Set Field Values for the Venue : Click on 'Add Field' 5 times
- Field : Value = Contact\_Email\_c : {!Contact\_Email.value}
- Field : Value = Contact\_Phone\_c : {!Contact\_Phone.value}
- Field : Value = Name : {!Venue\_Name}
- Field : Value = Venue\_Location\_c : {!location}
- Field : Value = Location\_Latitude\_s : {!latitude}



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

Field    Value

# Location (Latitude) X ← # Venue Details > Latitude X

Field    Value

# Location (Longitude) X ← # Venue Details > longitude X

[+ Add Field](#)

Manually assign variables

Activate Windows  
Go to Settings to activate Windows

Check for Matching Records

Disabled

15. Click on Save :

Flow Label :Venue Form

Flow API Name :Venue\_Form

Save the flow

\* Flow Label

\* Flow API Name

Description

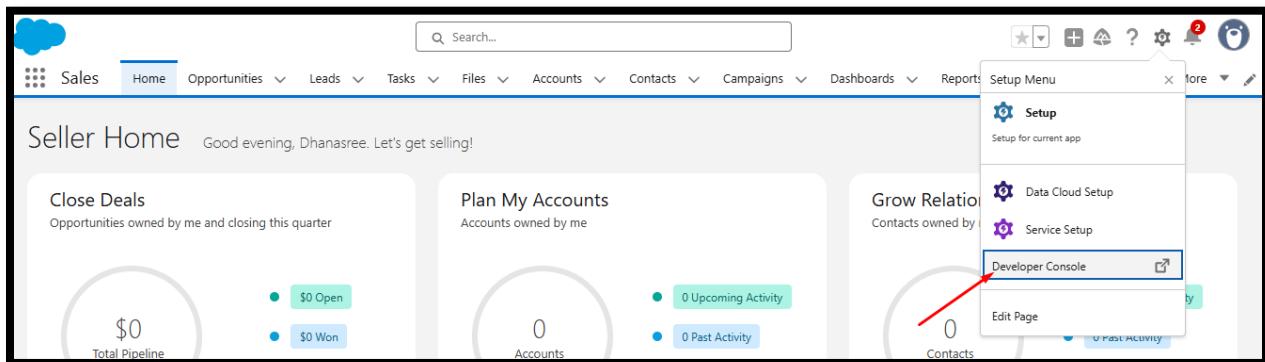
Show Advanced

## Milestone-07

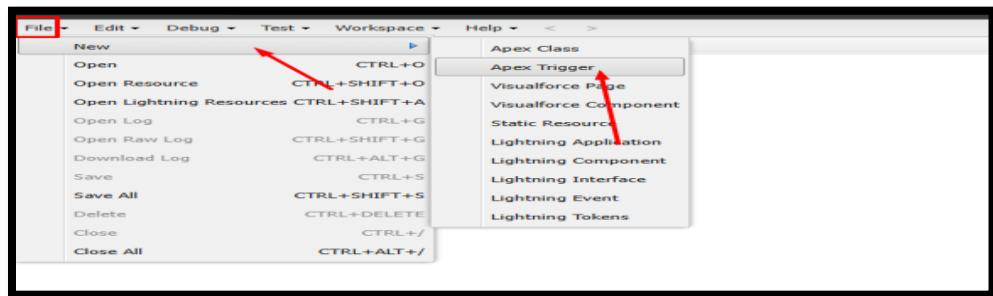
### Trigger

#### Create a Trigger

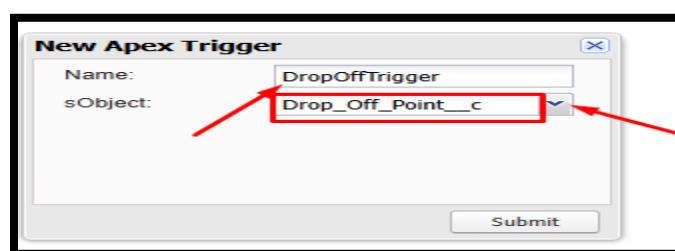
1. Log into the trailhead account, navigate to the gear icon in the top right corner.
2. Click on developer console and you will be navigated to a new console window.



3. Click on the File menu in the toolbar, and click on new >> Trigger.
4. Enter the trigger name and the object to be triggered.



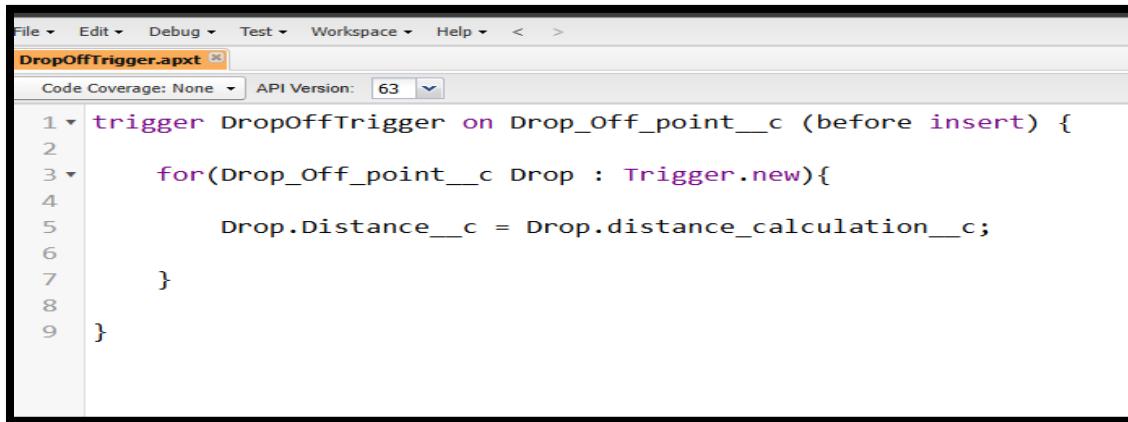
5. Enter Name : DropOffTrigger
  - sObject: Drop-Off Point
6. Click on Submit.



## Trigger Code

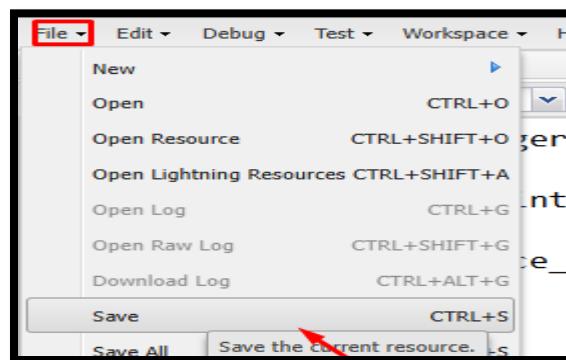
### Code:

```
triggerDropOffTrigger on Drop_Off_point__c (before insert) {  
    for(Drop_Off_point__c Drop : Trigger.new){  
        Drop.Distance__c = Drop.distance_calculation__c;  
    }  
}
```



The screenshot shows the Salesforce IDE interface with the file 'DropOffTrigger.apxt' open. The code editor displays the trigger code provided above. The IDE has a standard menu bar with options like File, Edit, Debug, Test, Workspace, and Help. The API Version is set to 63. The code coverage is shown as 'None'. The code itself is a trigger for the 'Drop\_Off\_point\_\_c' object, performing a distance calculation on insertion.

- Click on file then select save option.



## Milestone-08

### Profiles

1. Go to setup page >> type Profiles in Quick Find bar >> click on Profiles >> click on 'S'
2. Click on Clone beside Standard Platform User.

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Users', the 'Profiles' link is highlighted with a red arrow. On the main page, the 'Profiles' section is displayed with a table. The 'Standard Platform User' row is selected and highlighted with a red box. A red arrow points from the 'Edit | Clone' link in this row to the 'Clone' link in the top right corner of the page.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Del	Salesforce API Only System Integrations	Salesforce Integration	✓
<input type="checkbox"/> Edit   Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	System Administrator	Salesforce	<input type="checkbox"/>

1. Under Clone Profile:
  - a. Profile Name : NGOs Profile
2. Then click on Save

The screenshot shows the 'Clone Profile' dialog box. It prompts the user to enter the name of the new profile. A red arrow points from the 'Profile Name' field, which contains 'NGOs Profile', to the 'Save' button at the bottom right of the dialog.

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	NGOs Profile

Save Cancel

## Milestone-09

### Creation of Users

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

The screenshot shows the Salesforce Setup interface under the 'Users' section. On the left, there's a sidebar with links like 'Permission Set Groups', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The 'Users' link is highlighted with a red box. The main area is titled 'All Users' with the sub-instruction 'On this page you can create, view, and manage users.' Below that is a note 'To get more licenses, use the Your Account app. [Let's Go](#)'. At the top of the user list table, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. The table has columns for Action, Full Name, Alias, Username, Role, and Active. Two users are listed: 'Chatter Expert' (Alias: Chatter, Username: chatter.00dgk000004fy8huau.fvzgbmq6jera@chatter.salesforce.com) and 'ERIC\_OroFarm' (Alias: OERIC, Username: eric.ch9fa1c6fb1@orofarm.com). A red arrow points from the text above to the 'New User' button.

- First Name : Iksha Foundation
- Last Name : Iksha\_Foundation
- Alias : iiksh
- Email : mounikapasupuleti118@gmail.com
- Username : iksha234@sb.com
- Nickname : Auto Populated
- User License : Salesforce Platform
- Profile : NGOs Profile
- Active : Check
- ClickSave

The screenshot shows the 'User Edit' dialog box. The 'General Information' tab is selected. It contains fields for First Name (Iksha Foundation), Last Name (Iksha\_Foundation), Alias (iiksh), Email (thotadhanasree8@gmail.com), Username (iksha234@sb.com), and Nickname (User1749113177451928039). To the right, there are dropdown menus for Role (<None Specified>), User License (Salesforce Platform), and Profile (NGOs Profile). A checkbox for Active is checked. Other checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, and Site.com Publishing User are present but unchecked. A note 'Activate Windows' is visible at the bottom right.

## Creation of User2:

- First Name : NSS
- Last Name : NSS
- Alias : nnss
- Email : mounikapasupuleti118@gmail.com
- Username : nss234d@sb.com
- Nickname : Auto Populated
- User License : Salesforce Platform
- Profile : NGOs Profile
- Active : Check
- Click Save

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	thotadhanasree8@gmail.com	Active	<input checked="" type="checkbox"/>
Username	nss234d@sb.com	Marketing User	<input type="checkbox"/>
Nickname	User1749113301999521966	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>

### Creation of User3:

- First Name : Street\_Cause
- Last Name : StreetCause
- Alias : sstre
- Email : mounikapasupuleti118@gmail.com
- Username : street234@sb.com
- Nickname : Auto Populated
- User License : Salesforce Platform
- Profile : NGOs Profile
- Active : Check
- Click Save

User Edit  
Street\_Cause StreetCause Help for this Page 

**User Edit** Save Save & New Cancel

**General Information** Required Information

First Name	Street_Cause	Role	<None Specified>
Last Name	StreetCause	User License	Salesforce Platform
Alias	sstre	Profile	NGOs Profile
Email	thotadhanasree8@gmail.com	Active	<input checked="" type="checkbox"/>
Username	street234@sb.com	Marketing User	<input type="checkbox"/>
Nickname	User1749113448928875808 	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Photo		File Name: <input type="text"/> Content Type: <input type="text"/>	

## Milestone-10

### Creation of Public Group 1

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

Group Membership  
Group: Iksha

Help for this Page

Group Information

Edit Public Group

Label: Iksha

Group Name: Iksha

Grant Access Using Hierarchies:

Description:

Search: Public Groups for: Find

Available Members: Group: NSS, Group: StreetCause

Selected Members: Dhanasree Thota, Iksha Foundation Iksha\_Foundation

Add

Activate Windows  
Go to Settings to activate Windows.

## Creation of Public Group 2

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

2. Under Group Information:

Label : NSS

Group Name : NSS

Grant Access Using Hierarchies : Check

3. In Search, Select Users.

4. In Selected Members Add NSS NSS and System Administrator

The screenshot shows the 'Edit Public Group' page under the 'Group Membership' section for a group named 'Group: NSS'. The 'Group Information' section includes fields for 'Label' (NSS), 'Group Name' (NSS), and 'Grant Access Using Hierarchies' (checked). A 'Description' field is empty. Below this, a search bar is set to 'Public Groups'. The 'Available Members' list contains 'Group: Iksha' and 'Group: StreetCause'. The 'Selected Members' list contains 'Dhanasree Thota' and 'NSS NSS'. An 'Add' button is located between the two lists. At the bottom right, there is a message: 'Activate Windows' and 'Go to Settings to activate Windows.'

## Creation of Public Group 3

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

Group Membership  
Group: StreetCause

Help for this Page ?

Group Information Save Cancel

Edit Public Group Required Information

Label: StreetCause

Group Name: StreetCause i

Grant Access Using Hierarchies  i

Description:

Search: Public Groups Find

Available Members Selected Members

Group: Iksha ▲ Group: NSS	Dhanasree Thota Street_Cause StreetCause
------------------------------	---

Add

Activate Windows  
Go to Settings to activate Windows

1. After Saving this would look like this.

Public Groups

A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.

View: All Edit Create New View

New

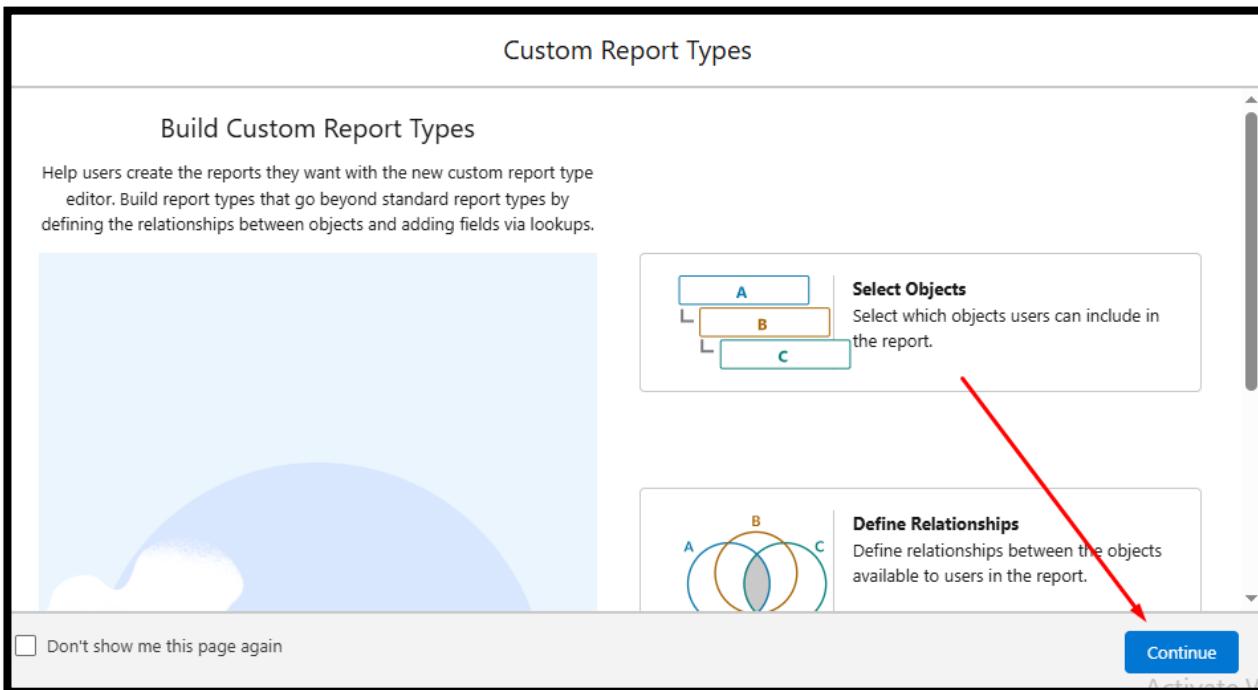
Action	Label	Group Name	Created By	Created Date
<a href="#">Edit</a>   <a href="#">Del</a>	Iksha	Iksha	Thota, Dhanasree	6/5/2025, 1:55 AM
<a href="#">Edit</a>   <a href="#">Del</a>	NSS	NSS	Thota, Dhanasree	6/5/2025, 1:56 AM
<a href="#">Edit</a>   <a href="#">Del</a>	StreetCause	StreetCause	Thota, Dhanasree	6/5/2025, 1:59 AM

## Milestone-11

### Report Types

#### Creation of Report Types

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



2. In Define the Custom Report Type:

- Primary Object : Select Venues
- Report Type Label : Venue with DropOff with Volunteer
- Report Type Name : Venue\_with\_DropOff\_with\_Volunteer
- Description : Venue with DropOff with Volunteer

\* Primary Object

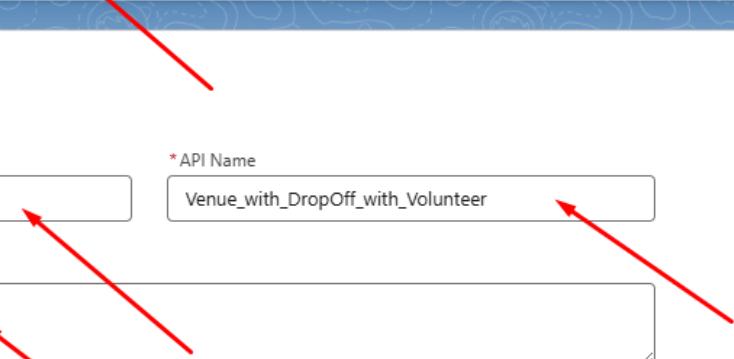


Details

\* Display Label

\* API Name

\* Description



- Store in Category : Select Other Reports
- Deployment Status : Deployed

### 3. Click on Next

\* Store in Category



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.

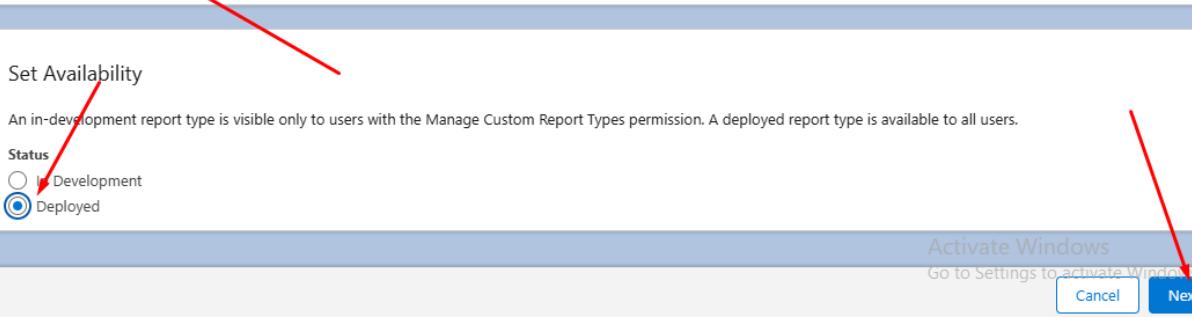
Status

Development

Deployed

Activate Windows  
Go to Settings to activate Windows

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



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

Select related objects to define which records are included in reports using this report type.

**A Venues**  
Primary Object

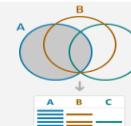
**B Drop-Off Points**  
A to B Relationship:  
 Each "A" record must have at least one related "B" record.  
 "A" records may or may not have related "B" records.

**C Volunteers**  
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.

(Click to relate another object)

Activate Windows  
Go to Settings to activate Windows

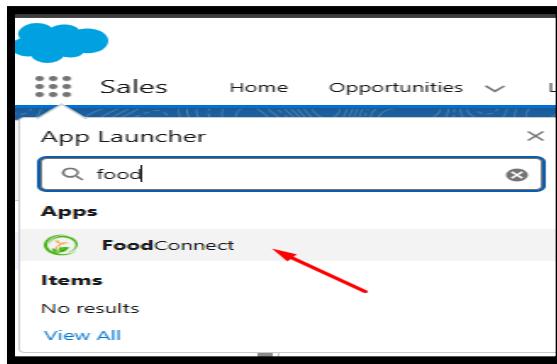
[Cancel](#) [Save](#)



## Milestone-12

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

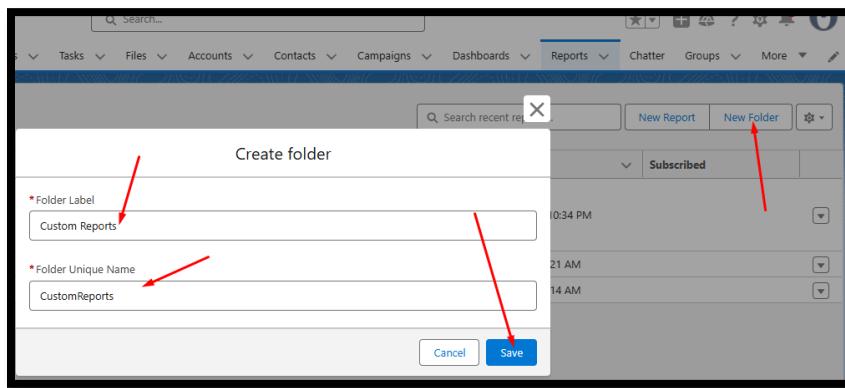
1. Go to the app(FoodConnect)



2. click on the reports tab

3. Click on New Folder.

- Folder Label : Custom Reports
- Folder Unique Name : CustomReports



3. Open Custom Reports and click on New Report
4. Select Report Type : Venue with DropOff with Volunteer
5. Then click on Start Report.



6. In GROUP ROWS : Add Volunteer Name
7. In Columns : Add Venue Name, Drop-Off point Name, Distance.
8. Now click on Save & Run.

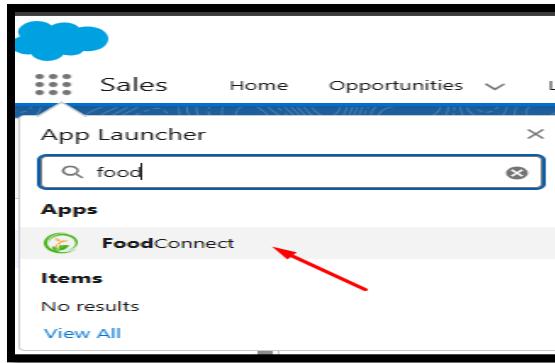
The screenshot shows the Salesforce Report Builder interface. The report is titled "venue and Drop Off point" and has a sub-report title "Venue with DropOff with Volunteer". The left sidebar displays the report structure with sections for "Outline", "Filters", "Groups", "GROUP ROWS", "GROUP COLUMNS", and "Columns". Under "Groups", there is a section for "Add group..." and a dropdown menu for "Volunteer Name". Under "Columns", there is a section for "Add column..." and dropdown menus for "Venue Name", "Drop-Off Point Name", and "Distance". The main content area shows a table with data grouped by "Volunteer Name". The table has columns for "Venue Name", "Drop-Off Point Name", and "Distance". The data includes rows for Allmas, Dhanu, Manasa, Mounika, and Ramya, with subtotals and a grand total. At the bottom of the report area, there are checkboxes for "Row Counts", "Detail Rows", "Subtotals", and "Grand Total". To the right of the report area, there are buttons for "Save & Run", "Save", "Close", and "Run". A red arrow points from the "Save & Run" button to the "Run" button. Another red arrow points to the "Add group..." button in the "Groups" section of the outline.

Volunteer Name	Venue Name	Drop-Off Point Name	Distance
Allmas (1)	Allmas	Goa	-
Subtotal			0.0000
Dhanu (1)	Dhanasree	HYD	-
Subtotal			0.0000
Manasa (1)	Manasa	Chennai	-
Subtotal			0.0000
Mounika (1)	Mounika	tirupati	-
Subtotal			0.0000
Ramya (1)	Ramya	Tirupati	-
Subtotal			0.0000
Total (5)			0.0000

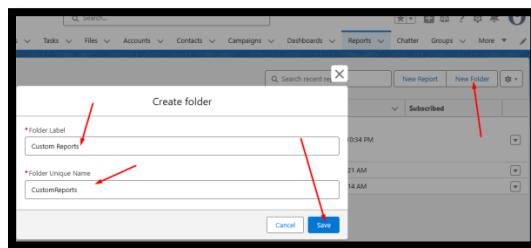
8. Give Label as :
9. Report Name : venue and Drop Off point
10. Report Unique Name : Auto Populated
11. Click on Select Folder and select Custom Report, then click on Save.

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

1. Go to the app(FoodConnect) >> click on the reports tab



1. Click on Custom Reports Folder and click on New Report
2. Select Report Type : Volunteers with Execution Details and Tasks.
3. Then click on Start Report.



A screenshot of the 'Create Report' dialog box. On the left, there's a sidebar with categories like 'Recently Used', 'All', 'Accounts &amp; Contacts', 'Opportunities', etc. In the center, there's a search bar with 'vol' typed into it, and a list of report types: 'Activities with Volunteers', 'Tasks with Execution Details and Volunteers', 'Volunteers', 'Volunteers with Drop-Off Point', and 'Volunteers with Execution Details and Tasks'. On the right, there's a 'Details' panel showing 'Volunteers with Execution D...' (Standard Report Type), a 'Start Report' button, and sections for 'Created By You' and 'Volunteer Task'. A red arrow points from the bottom left towards the 'Create Report' dialog.

1. Then click on Start Report.
2. In GROUP ROWS : Volunteer ID
3. In Columns : Add Volunteer : Volunteer Name, Task : Task Name, Execution Detail : Execution Detail Name, Volunteer: Owner Name, Task: Date, Task : Rating.
4. Now click on Save & Run.

5. Give Label as :

- Report Name : Volunteer Task
- Report Unique Name : Auto Populated

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

The screenshot shows the Oracle Reports interface with the following details:

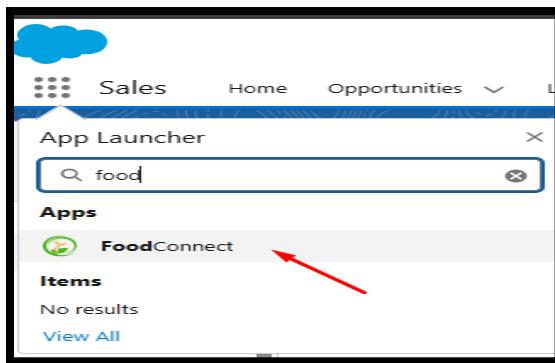
- REPORT:** Volunteer Task
- Filters:** Previewing a limited number of records. Run the report to see everything.
- Outline:** Shows the structure of the report with sections like "Volunteer: ID", "Subtotal", "Execution Detail", and "Total".
- Columns:** Lists the columns being displayed: "Volunteer: Volunteer Name", "Task: Task Name", "Execution Detail: Execution Detail Name", "Volunteer: Owner Name", "Task: Date", and "Task: Rating".
- Data Grid:** Displays five rows of data corresponding to the columns listed.
- Buttons:** Includes "Save & Run", "Save", "Close", and "Run".
- Other:** "Update Preview Automatically" checkbox, "Activate Windows" message, and "Go to Settings to activate Windows" link.

## Milestone-13

### Dashboards

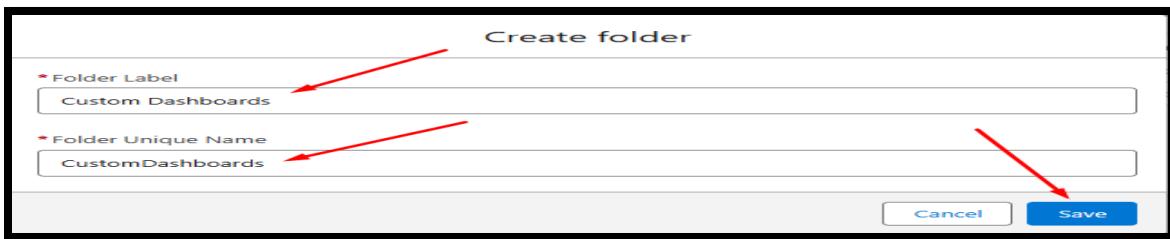
#### Adding venue and Drop Off point Report to the Dashboard:

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



2. Click on New Folder.

- Folder Label : Custom Dashboards
- Folder Unique Name : Auto Populated



3. Open Custom Dashboards and click on New Dashboards
4. Name : Organization Details
5. Click on Widget and select Chart or Table
6. In Select Report : Select venue and Drop Off point Report.
7. Then click on select
  - In Add Component:
    - Display As : Select Lightning Table
    - Component Theme : Select Dark (Optional)

### Edit Widget

Report  
venue and Drop Off point

Use chart settings from report i

Display As

Groups  
Add group...

Preview

venue and Drop Off point

Venue Name ↑	Drop-Off Point Name	Distance
Allmas	Goa	123.0000
Dhanasree	HYD	123.0000
Manasa	Chennai	123.0000
Mounika	tirupati	234.0000
Ramya	Tirupati	-

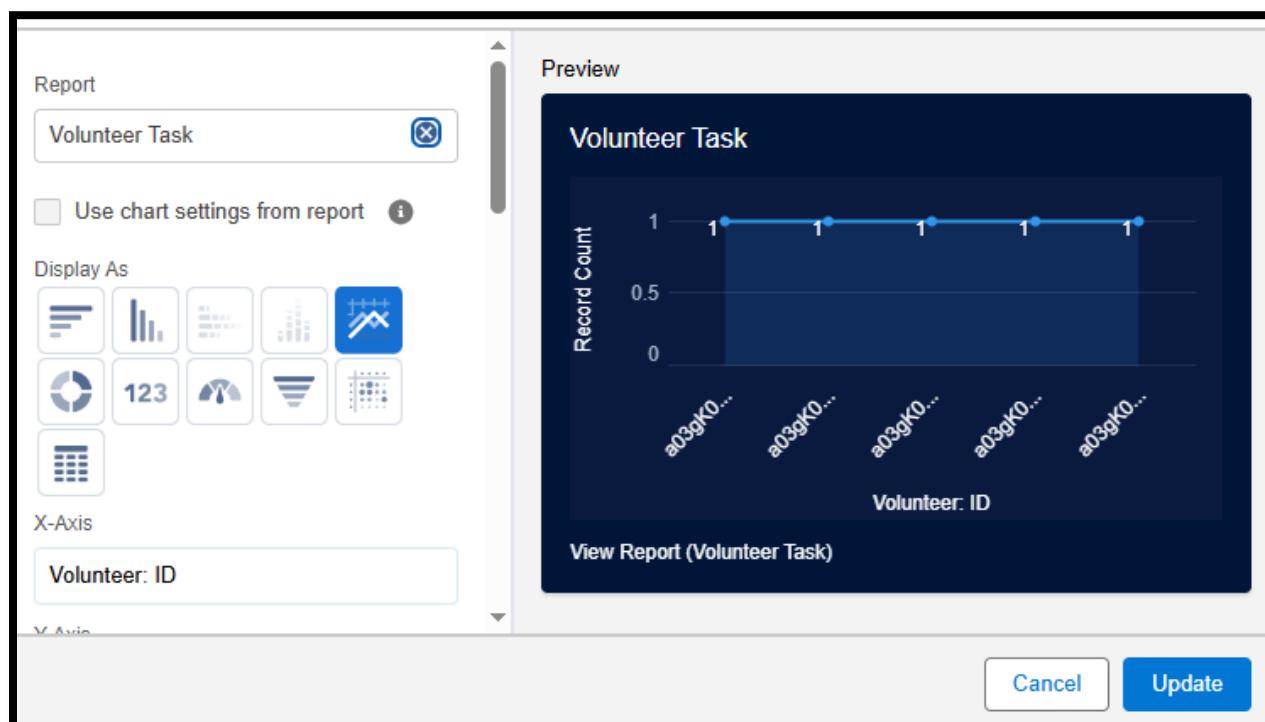
[View Report \(venue and Drop Off point\)](#)

## Adding Volunteer Task Report to the Dashboard:

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

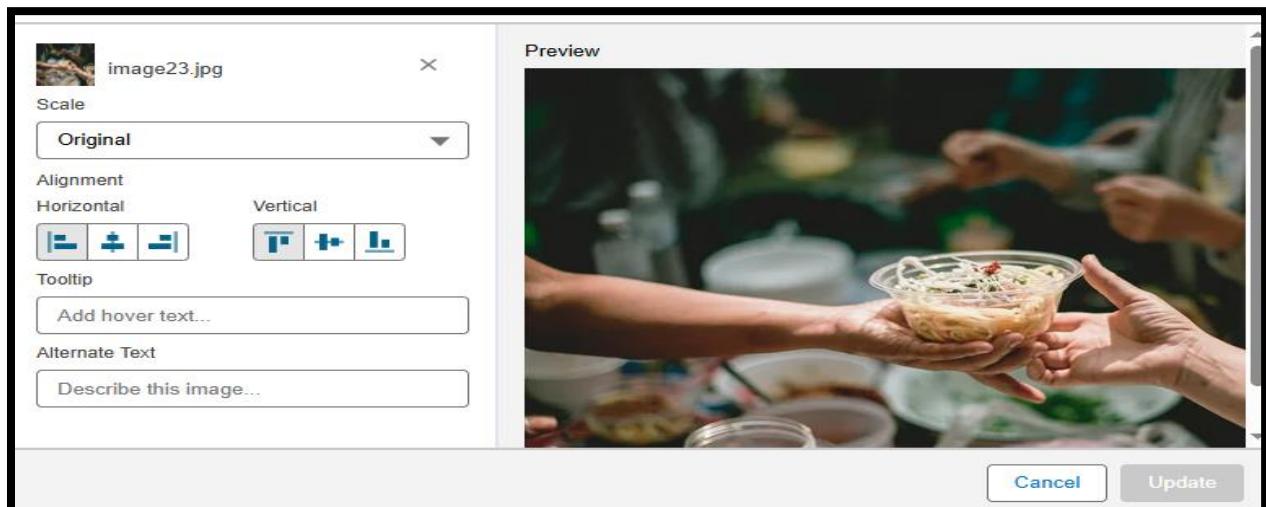
Display As : Select Line Chart

Component Theme : Select Dark (Optional)



### **Adding a Picture to the Dashboard (Optional):**

1. Click on Widget and select Image. Then click on Browse Files.
2. Then Select the Picture you want to upload in this Dashboard.
3. Then click on Save As :
  - Name : Task Execution Details
  - Click on Select Folder and select Custom Dashboards
4. Click on Select Folder and then Save.

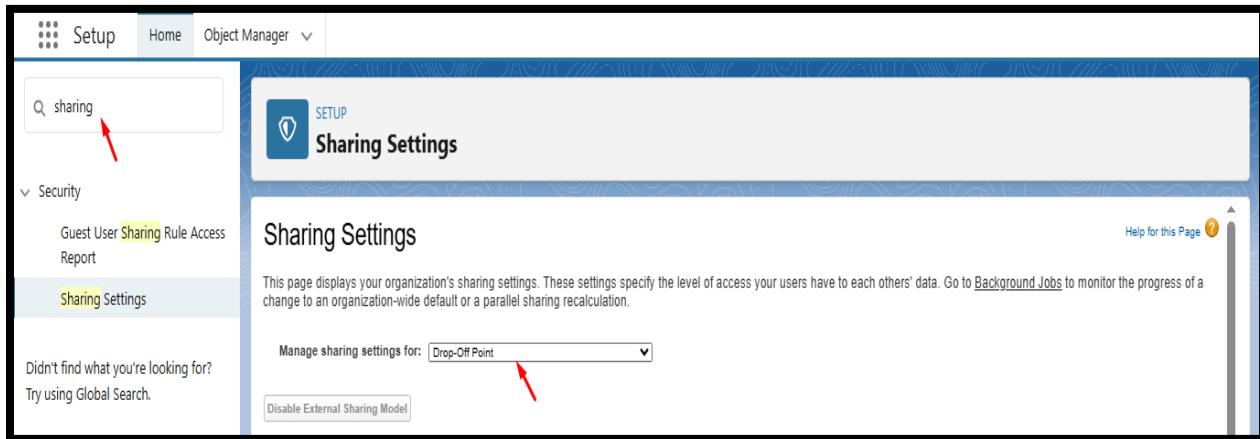


# Milestone-14

## Sharing Rules

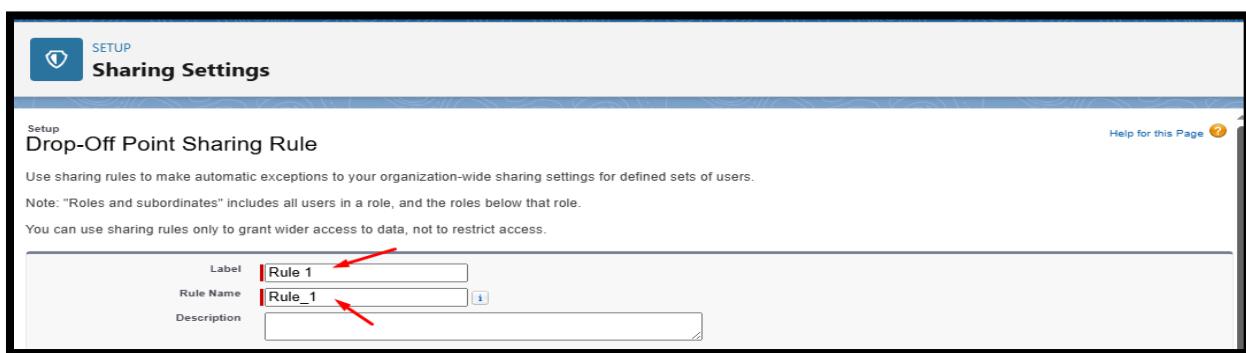
### Creation of sharing rules:

1. Go to setup >> type Sharing Settings in quick find box >> Click on the Sharing Settings.
2. Scroll down and find Drop-Off point Sharing Rules.



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

- Label : Rule 1
- Rule Name : Rule\_1



4. Select your rule type : Select Based on criteria.
5. Select which records to be shared:
  - Field : Operator : Value = Distance : less than : 15
6. Select the users to share with : Near Share With
  - Public Groups : Iksha
7. Click on Save.

**Step 1: Select your rule type**

Criteria

Field	Operator	Value	AND
Distance	less than	15	AND
—None—	—None—		

[Add Filter Logic...](#)

Additional Options:  Include records owned by users who can't have an assigned role [?](#)

Share with: Group: Iksha

Access Level: **Read/Write**

Created By: Dhanasree Thota, 6/5/2025, 2:53 AM

Modified By: Dhanasree Thota, 6/5/2025, 2:57 AM

Activate Windows  
Go to Settings to activate Windows.

**Save** **Cancel**

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

- Label : Rule 2
- Rule Name : 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.

Label: **Rule 2**

Rule Name: **Rule\_2**

Description:

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

10. Select which records to be shared:

- Field : Operator : Value = Distance : greater than : 15
- Field : Operator : Value = Distance : less or equal : 30

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

- Public Groups : NSS

12. Click on Save.

**Step 1: Select your rule type**

Criteria

Field	Operator	Value	AND
Distance	greater than	15	AND
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 [?](#)

Share with: Group: NSS

Access Level: **Read/Write**

Created By: Dhanasree Thota, 6/5/2025, 2:55 AM

Modified By: Dhanasree Thota, 6/5/2025, 2:58 AM

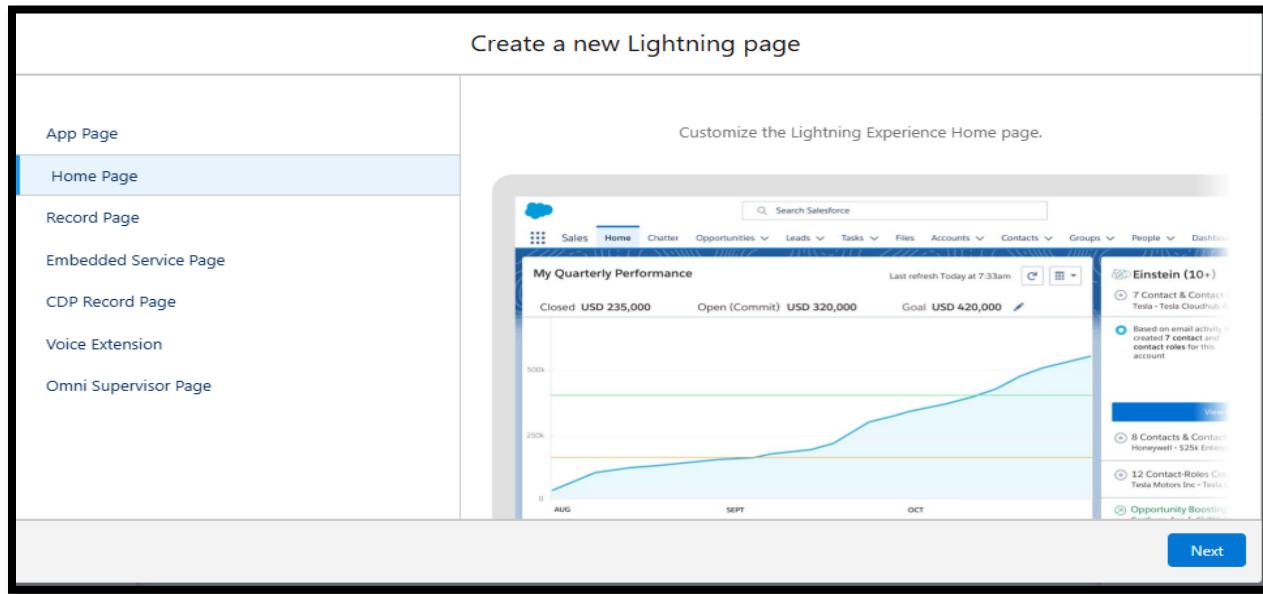
Activate Windows  
Go to Settings to activate Window

**Save** **Cancel**

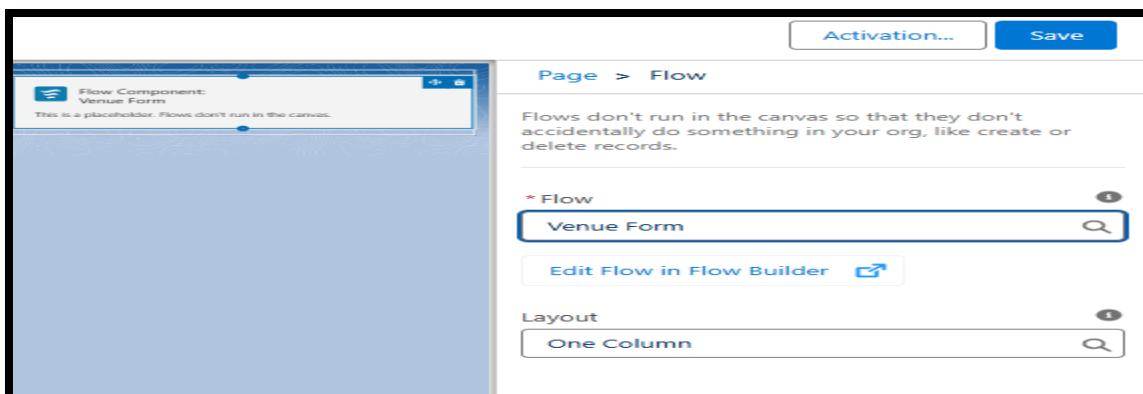
## Milestone-15

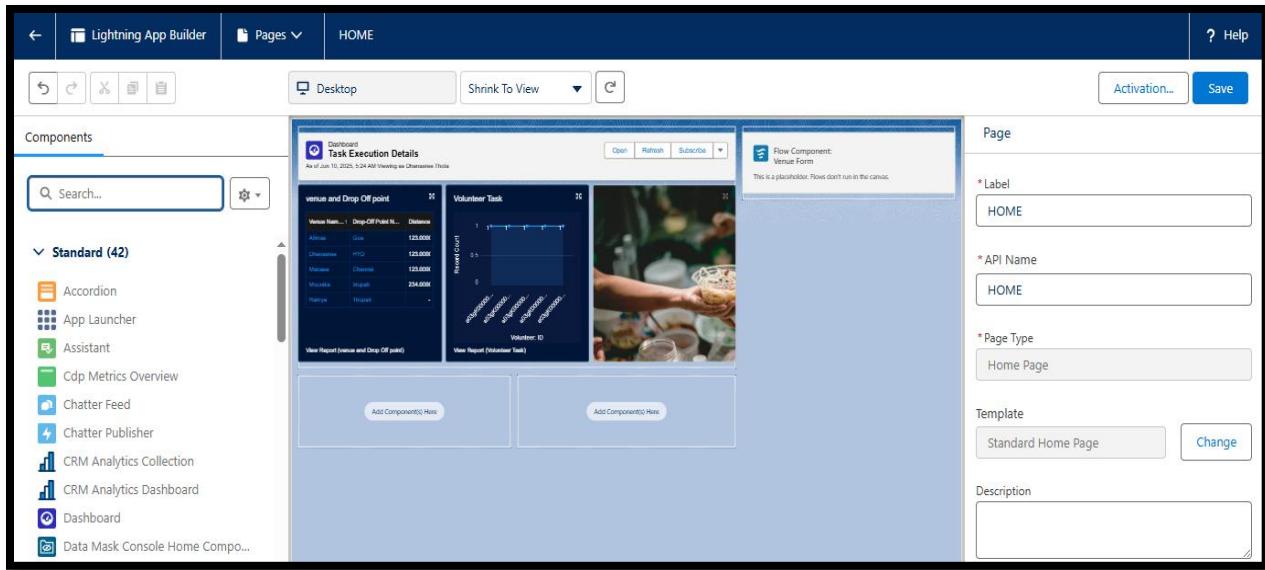
### Home Page

1. Go to setup >> type Lightning App Builder in quick find box >> Click on the Lightning App Builder and Select the New.
2. Select Home Page and give Label as HOME Page.



3. Select Standard Home Page.
4. Near Components search for Flow and Drag and Drop in Right Side Section..
5. On the right hand side:
  - Flow : Venue Flow
6. Near Components search for Dashboard, then Drag and Drop it in first Section.





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

**Task Execution Details**

As of Jun 10, 2025, 5:24 AM Viewing as Dhanasree Thota

Venue Name...	Drop-Off Point N...	Dist...
Allmas	Goa	123.000
Dhanasree	HYD	123.000
Manasa	Chennai	123.000
Mounika	tirupati	234.000
Ramya	Tirupati	-

**Volunteer Task**

Record Count: 1

Volunteer ID: ad39k0000...

**Venue Form**

Venue Name:

Email: you@example.com

Phone:

Location:

Latitude:

Longitude:

Activate Windows [Next](#)

Go to Settings to activate Windows.

## Home Tab

**Venues**

**Recently Viewed**

5 items • Updated a few seconds ago

	Venue Name
1	Dhanasree
2	Allmas
3	Ramya
4	Manasa
5	Mounika

## Venue Tab

**Drop-Off Points**

**Recently Viewed**

5 items • Updated a few seconds ago

	Drop-Off Point Name
1	HYD
2	Chennai
3	tirupati
4	Goa
5	Tirupati

## Drop-Off Point Tab

The screenshot shows the FoodConnect software interface with the 'Tasks' tab selected. The top navigation bar includes links for Home, Venues, Drop-Off Points, Tasks, Volunteers, Execution Details, Reports, and Dashboards. A search bar and various system icons are also present. The main content area displays a 'Recently Viewed' list of tasks, each with a checkbox and a name. A toolbar at the top of the list provides options for New, Import, Change Owner, and Assign Label.

Task Name
1 Work
2 work2
3 work3
4 Work4
5 Work5

## Tasks Tab

The screenshot shows the FoodConnect software interface with the 'Volunteers' tab selected. The top navigation bar includes links for Home, Venues, Drop-Off Points, Tasks, Volunteers, Execution Details, Reports, and Dashboards. A search bar and various system icons are also present. The main content area displays a 'Recently Viewed' list of volunteers, each with a checkbox and a name. A toolbar at the top of the list provides options for New, Import, Change Owner, and Assign Label.

Volunteer Name
1 Dhanu
2 Ramya
3 Manasa
4 Mounika
5 Allmas

## Volunteers Tab

The screenshot shows the FoodConnect software interface with the 'Execution Details' tab selected. The top navigation bar includes links for Home, Venues, Drop-Off Points, Tasks, Volunteers, Execution Details, Reports, and Dashboards. A search bar and various system icons are also present. The main content area displays a 'Recently Viewed' list of execution details, each with a checkbox and a name. A toolbar at the top of the list provides options for New, Import, Change Owner, and Assign Label.

Execution Detail Name
1 Mounika
2 Allmas
3 Manasa
4 Ramyashree
5 Dhanasree

The screenshot shows the FoodConnect software interface with the Reports tab selected. The top navigation bar includes Home, Venues, Drop-Off Points, Tasks, Volunteers, Execution Details, Reports (selected), Dashboards, and a user icon. A search bar at the top right says "Search...". Below the navigation is a sidebar with "Reports" and "Recent" sections, showing "3 items". The main area displays a table with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The table contains three rows:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	5/26/2025, 10:34 PM	<input type="checkbox"/>
Created by Me	Volunteer Task		Custom Reports	Dhanasree Thota	6/5/2025, 2:21 AM	<input type="checkbox"/>
Private Reports	venue and Drop Off point		Custom Reports	Dhanasree Thota	6/5/2025, 2:14 AM	<input type="checkbox"/>
Public Reports						
All Reports						

## Reports Tab

The screenshot shows the FoodConnect software interface with the Dashboards tab selected. The top navigation bar includes Home, Venues, Drop-Off Points, Tasks, Volunteers, Execution Details, Reports, Dashboards (selected), and a user icon. A search bar at the top right says "Search...". Below the navigation is a sidebar with "Dashboards" and "Recent" sections, showing "2 items". The main area displays a table with columns: Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. The table contains two rows:

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Task Execution Details		Custom Dashboards	Dhanasree Thota	6/5/2025, 2:45 AM	<input type="checkbox"/>
Created by Me	Organization Details		Private Dashboards	Dhanasree Thota	6/5/2025, 2:27 AM	<input type="checkbox"/>
Private Dashboards						
All Dashboards						
FOLDERS						
All Folders						

## Dashboards Tab

## **Milestone-16**

### **Conclusion**

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