

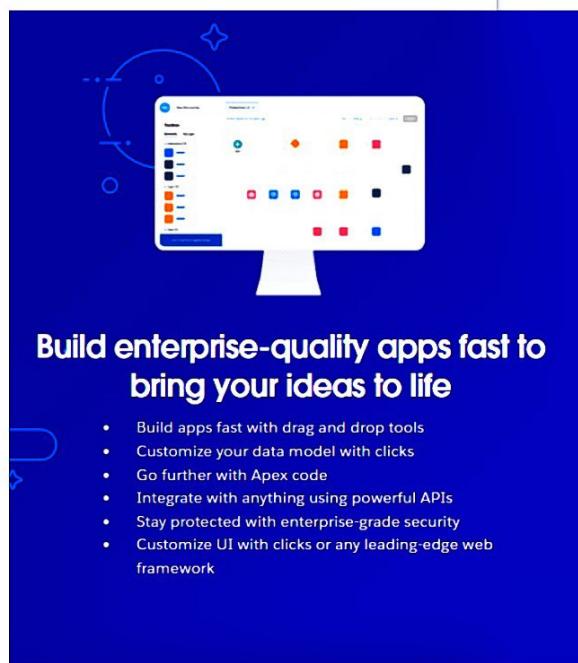
- + Public Groups
- + Report Types
- + Reports
- + Dashboards
- + Sharing Rules
- + Home Page

Conclusion

Creating Developer Account

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/sign>
2. On the sign up form, enter the following details :



1. First name & Last

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Conclusion

bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

1. First name & Last name
2. Email
3. Role : Developer
4. Company : College or Company Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format :

username@organization.com

Click on sign me up after filling these.

Report Types

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Dashboards

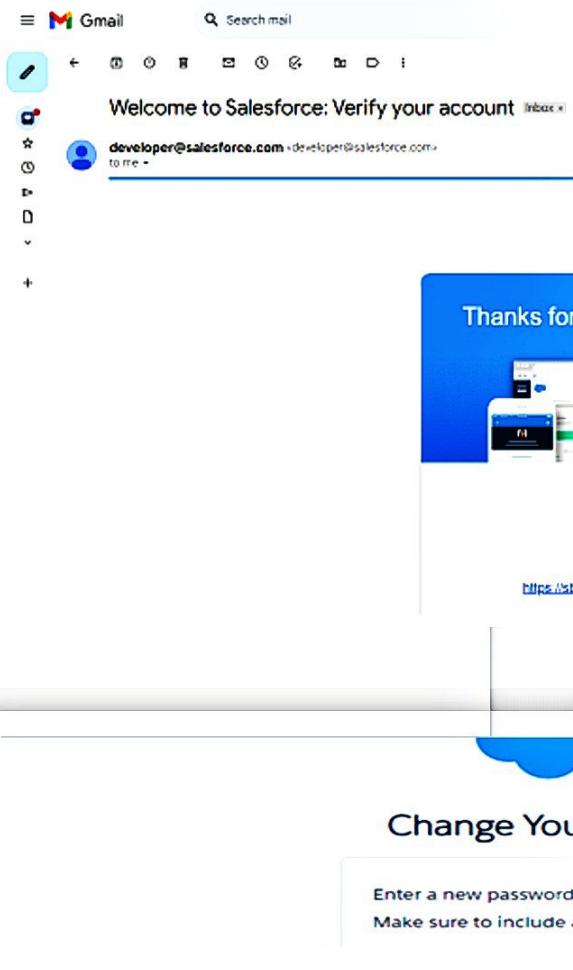
Sharing Rules

Home Page

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Account Activation

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



8:37

7.00 KB/S VoLTE 4G 80%

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developer@salesforce.com <developer@salesforce.com>
to me

 salesforce

Thanks for signing up with Salesforce!

Click below to verify your account.

[Verify Account](#)

To easily log in later, save this URL:
<https://sboom-dev-ed.develop.my.salesforce.com>

Change Your Password

Enter a new password for **lead@sb.oom**.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

* Confirm New Password
..... Match

Security Question
▼ In what city were you born?

* Answer
asdfghijkl

[Change Password](#)

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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.

- + Creation Of Users
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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

- + Report Types
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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.

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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
 3. 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.

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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
 3. Enter Record Name Label and Format
 - Record Name
>> Execution Detail Name
 - Data Type
>> Text
2. Click on Allow reports and Track Field History, Allow Activities
3. Allow search >> Save.

8:38

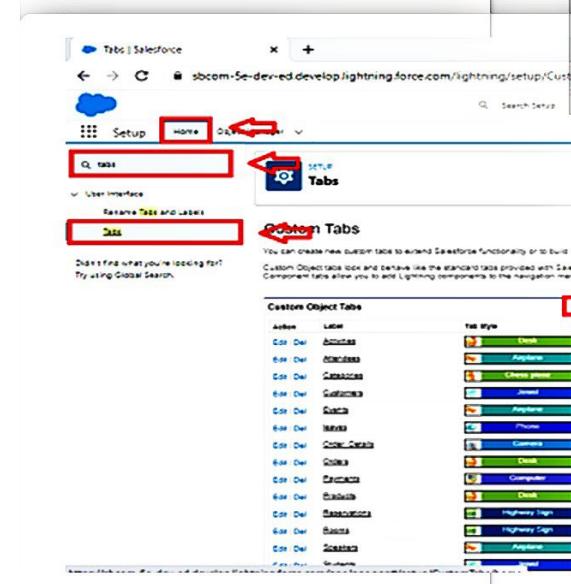
45.0 KB/S LTE 4G 79%

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Creating A Custom Tab

To create a Tab:(Venue)

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



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Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “Drop-Off Point, Task, Volunteer, Execution Details”.
2. Follow the same steps as mentioned in Activity -1.

8:39 83.0 KB/S LTE 4G 79%

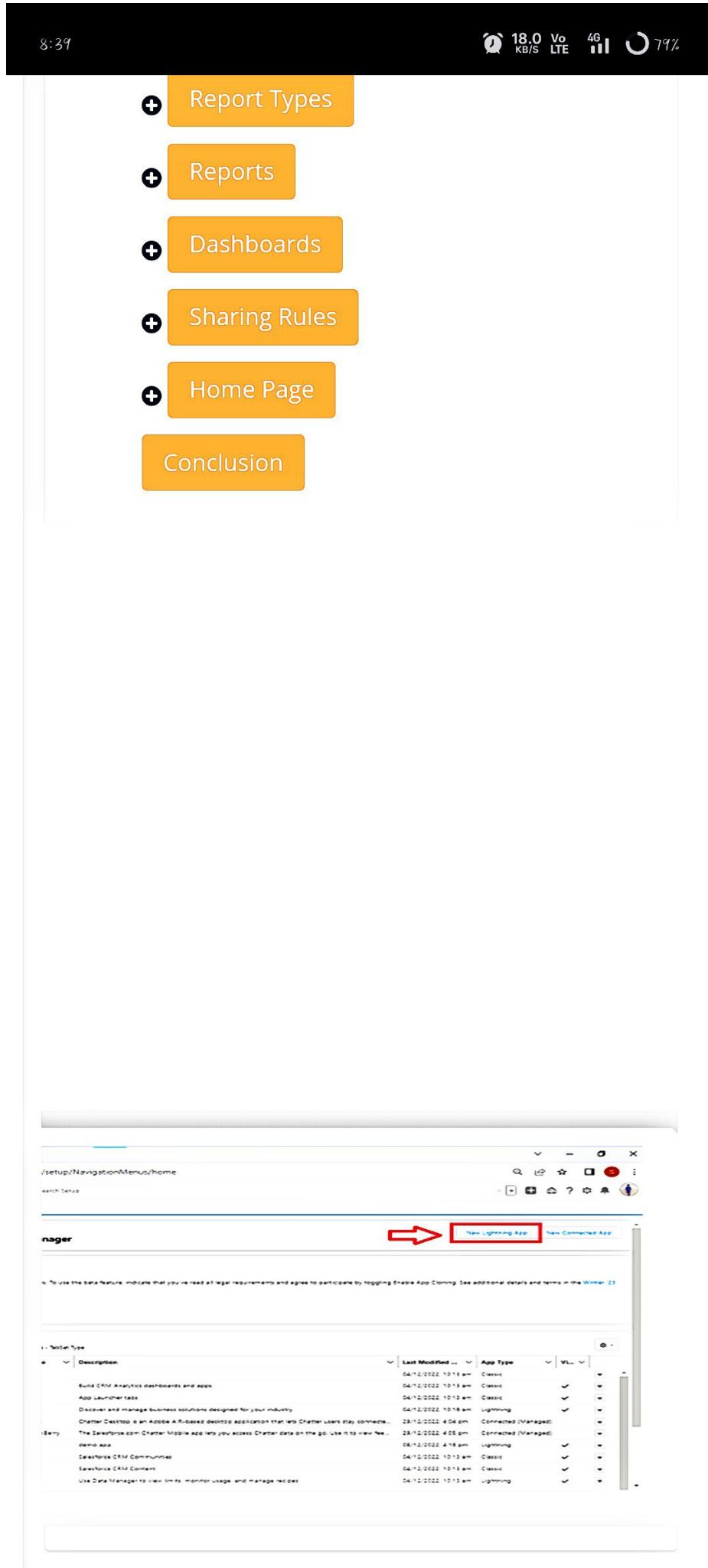
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Create A Lightning App

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.

The screenshot shows the Salesforce App Manager interface. At the top, there's a navigation bar with tabs for 'Setup', 'Home', and 'Object Manager'. Below the navigation bar, there's a search bar labeled 'Search Setup'. In the main content area, there's a heading 'Lightning Experience App Manager' with a sub-section 'Create new Lightning apps by cloning existing apps. To use the best release notes'. There's also a button 'Enable App Cloning' with a switch that is turned off. At the bottom, there's a table titled '15 items > Sorted by App Name > Altered by All modifications > Tested Type'. The table lists various apps with columns for 'App Name', 'Developer Name', and 'Desc'. Some rows have red boxes around them, specifically the first two rows ('All Tabs' and 'Analytics Studio').



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Relationship Fields In Objects

Creation of Lookup Relationship Field on Volunteer Object :

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



2. Now click on "Fields & Relationships" >> New
3. Select Master Detail relationship
4. Select the related object "Drop-Off point" and click next.

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click next.

Step 2. Choose the related object

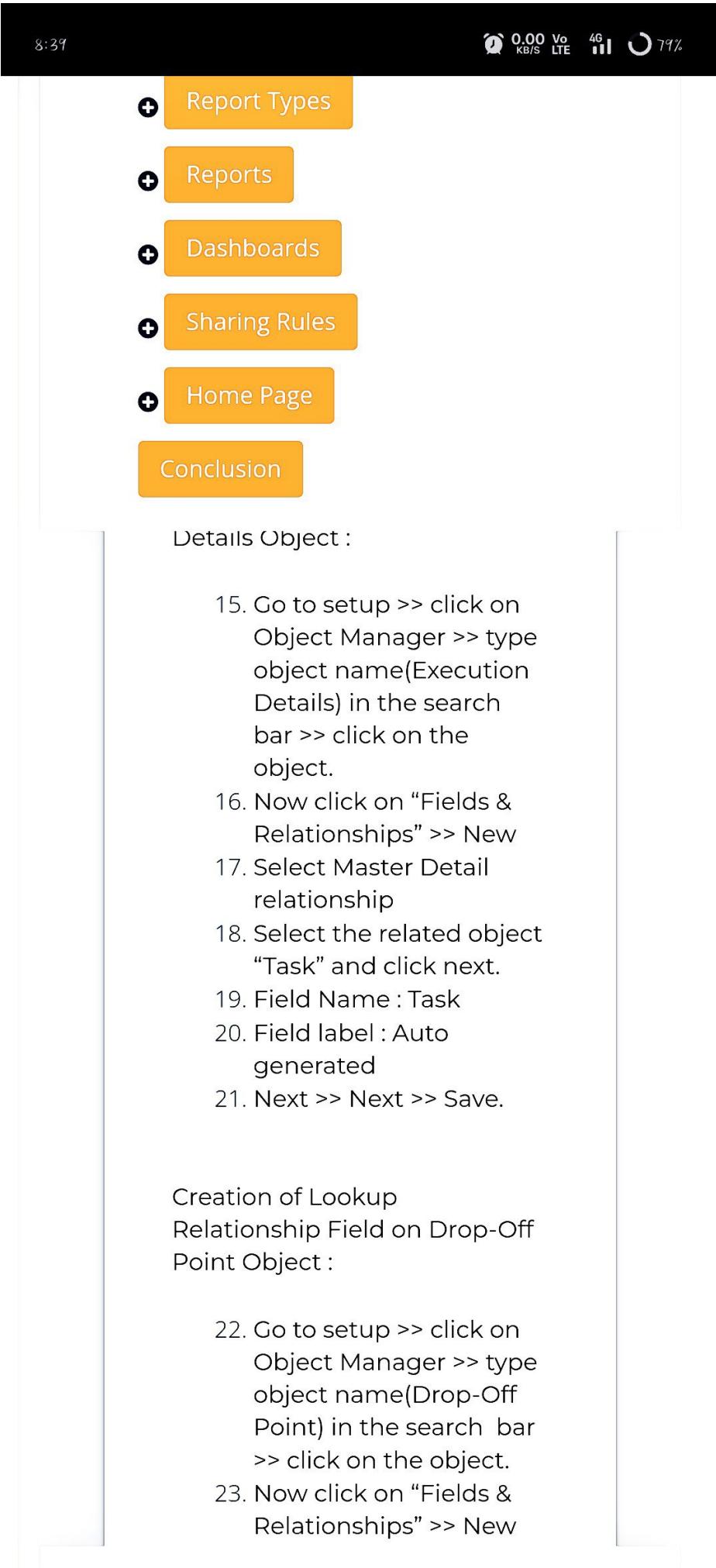
Select the other object to which this object is related

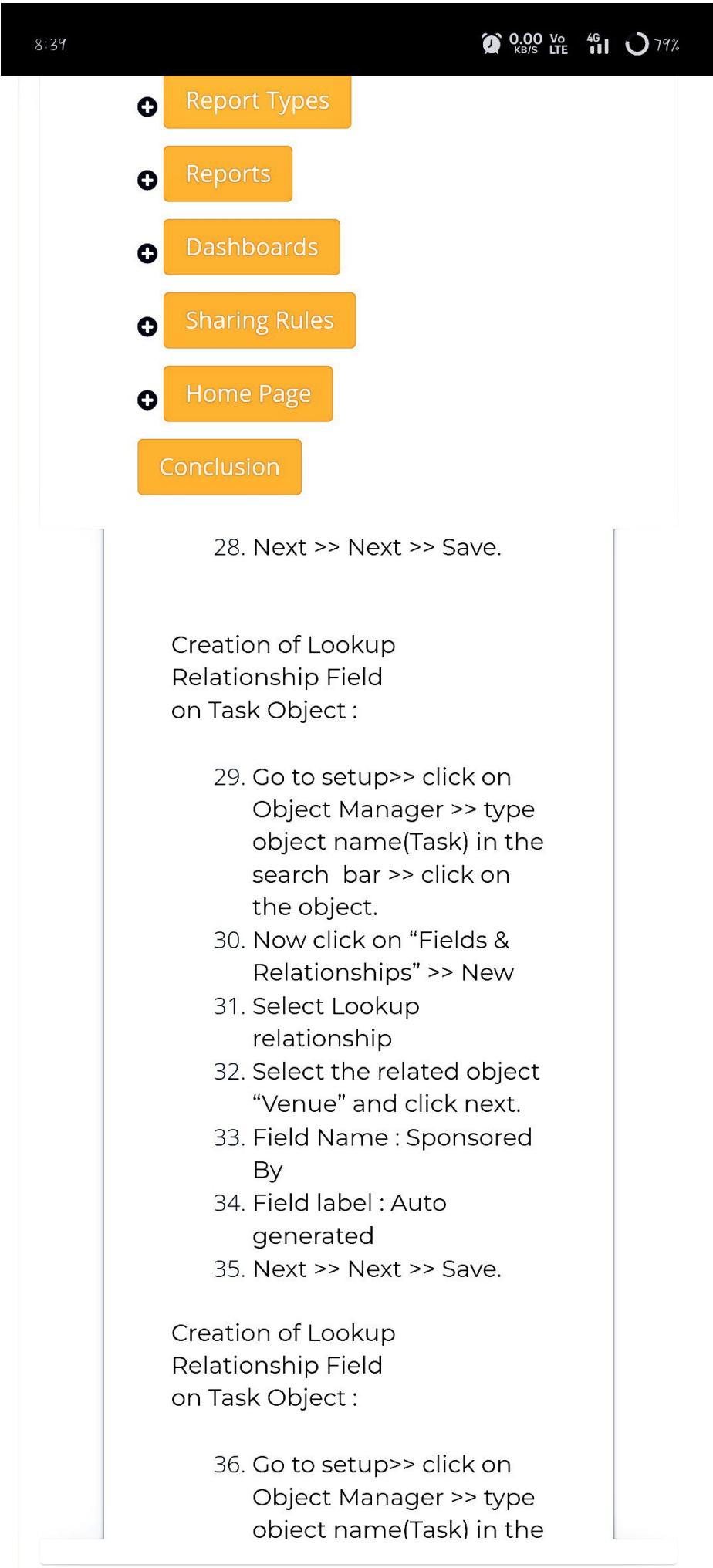
Related To 1

1. Field Name : Drop_Off_point
2. Field label : Auto generated
3. 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.





A screenshot of a smartphone screen displaying a list of report-related options. The top status bar shows the time as 8:39, signal strength, battery level at 79%, and connectivity status. Below the status bar is a vertical list of items, each enclosed in an orange rounded rectangle with a black plus sign icon on the left:

- Report Types
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- Dashboards
- Sharing Rules
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The "Conclusion" item is highlighted with a larger orange box. To the right of the list, there is a vertical column containing numbered steps and descriptive text.

33. Field Name : Sponsored
By

34. Field label : Auto
generated

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

42. Next >> Next >> Save.

The image shows a mobile application interface. On the left, there is a vertical navigation bar with six items, each in an orange button with a black plus sign icon:

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The main content area on the right contains the following text:

Creation Of Fields For The Venue Object

1. Go to setup>> click on Object Manager >> type object name(Venue) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Email” and Click on Next
4. Fill the Above as following:
 - Field Label : Contact Email
 - Field Name : Contact Email
 - Click on required check box
 - Click on Next >> Next >> Save and new.

To create another fields in an object:

5. Go to setup >> click on Object Manager >> type object name(Venue) in

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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
 - Click on required check box
 - Click on Next >> Next >> Save and new.

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Venue) in search bar >>click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Geolocation” and Click on Next
4. Fill the Above as following:
 - Field Label : Location
 - Decimal Places : 4
 - Field Name : Location
 - Description : Enter the

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- FIELD LABEL : LOCATION
- Decimal Places : 4
 - Field Name : Location
 - Description : Enter the Geolocation of your Venue
 - Click on Next >> Next >> Save and new.

To create another fields in an object:

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

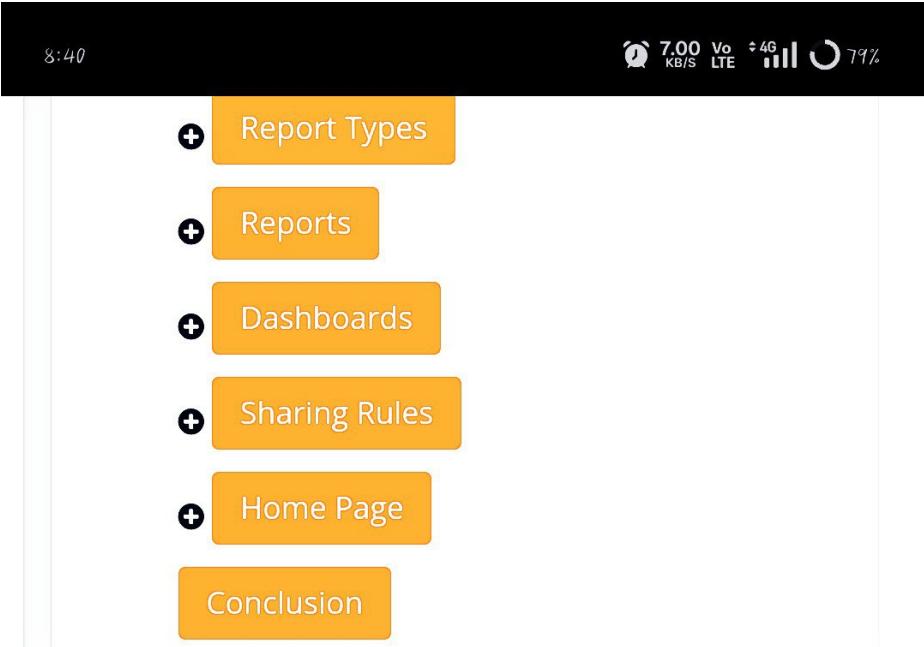
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Creation Of Fields For The Drop-Off Point Object

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
3. Select Data type as a “Geolocation” and Click on Next
4. Fill the Above as following:

- Field Label : Location 2
- Field Name : gets auto generated
- Description : Enter the Geolocation of the Drop off Point
- Geolocation Options : select Decimal
- Decimal Places : 4
- Click on Next >> Next >> Save and new.



To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Drop-Off point) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Formula” and Click on Next
4. Fill the Above as following:
 - Field Label : distance calculation
 - Field Name : distance_calculation
 - Formula Return Type : Number
 - Formula Options : DISTANCE(Location_2_c , Venue_r.Location_c , 'km')
 - Click on Next >> Next >> Save and new.

Formula Options

Formula Return Type	Number
Decimal Places	4

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Distance Calculation (Number) -
DISTANCE(Location_2_c , Venue_r.Location_c , 'km'

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

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Karnataka
Kerala
Maharashtra
Madhya Pradesh
Manipur
Meghalaya
Mizoram
Nagaland
Odisha
Punjab
Rajasthan
Sikkim
Tamil Nadu
Tripura
Telangana
Uttar Pradesh
Uttarakhand
West Bengal
Andaman & Nicobar (UT)
Chandigarh (UT)
Dadra & Nagar Haveli
and Daman & Diu (UT)
Delhi [National Capital
Territory (NCT)]
Jammu & Kashmir (UT)
Ladakh (UT)
Lakshadweep (UT)
Puducherry (UT)

- Click on required check
box
- Click on Next >> Next
>> Save and new

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Jammu & Kashmir (UT)

Ladakh (UT)

Lakshadweep (UT)

Puducherry (UT)

- Click on required check box
- Click on Next >> Next >> Save and new.

To create another fields in an object:

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 : Distance
 - Field Name : Distance
 - Length : 14
 - Decimal Places : 4
 - Click on required check box
 - Click on Next >> Next >> Save and new.

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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
3. Select Data type as a “Auto Number” and Click on Next
4. Fill the Above as following:

- Field Label : Task ID
- Display Format : TASK-{0}
- Starting Number : 1
- Field Name : gets auto generated
- Click on required check box
- Click on Next >> Next >> Save and new.

To create another fields in an object:

1. Go to setup >> click on

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To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Date” and Click on Next
4. Fill the Above as following:
 - Field Label : Date
 - Field Name : Date
 - Click on required check box
 - Click on Next >> Next >> Save and new.

To create another fields in an object:

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

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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
- Click on required check box
- Click on Next >> Next >> Save and new.

To create another fields in an object:

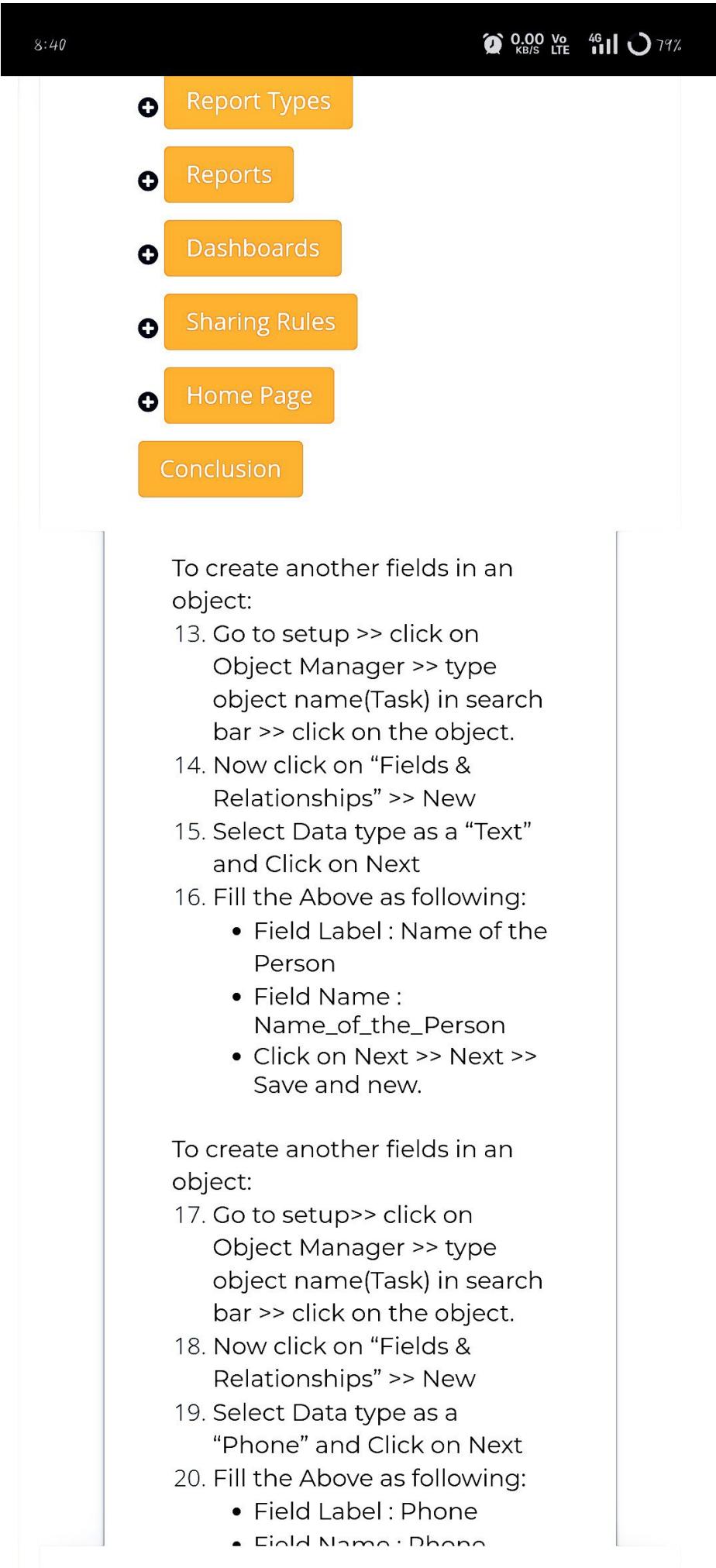
9. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.

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



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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 “Pick List” 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
 - 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 &

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- Field Label : Rating

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

1

2

3

4

5

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

To create another fields in an object:

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

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Creation Of Fields For The Volunteer Object

1. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Auto Number” and Click on Next
4. Fill the Above as following:
 - Field Label : Volunteer ID
 - Field Name : gets auto generated
 - Click on required check box
 - Click on Next >> Next >> Save and new.
 - 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

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

4. Fill the Above as following:

- Field Label : Gender
- Field Name : Gender
- Enter values, with each value separated by a new line :
Female
Male
- Click on Next >> Next >> Save and new.

To create another fields in an object:

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
- Click on required check box
- Click on Next >> Next >> Save and new

The screenshot shows a mobile application interface with a black header bar. In the top left corner is the time "8:41". In the top right corner are icons for signal strength, battery level at 79%, and network status showing "0.24 KB/S Vo LTE 4G". Below the header is a vertical list of menu items, each enclosed in an orange rounded rectangle with a black border and a small black plus sign icon on the left:

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Below the menu, there is a note with a small arrow pointing right: "► Click on Next >> Save and new." followed by the instruction ">> 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
 - Click on required check box
 - 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

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DOX

- 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
- Click on required check box
- 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.

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23. Select Data type as a “Text Area (Long)” and Click on Next

24. Fill the Above as following:

- Field Label : Address
- Field Name : Address
- Click on Next >> Next >> Save and new.

To create another fields in an object:

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

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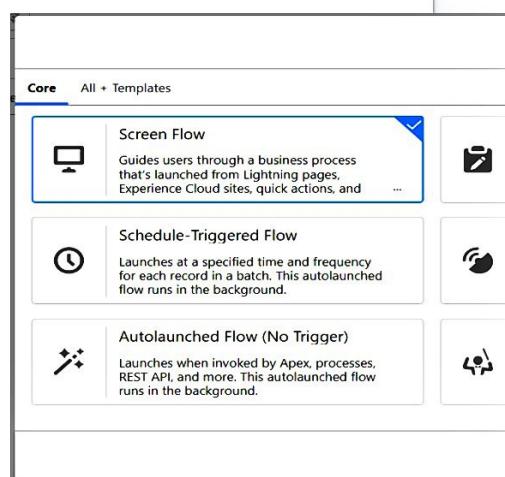
Creation Of Fields For The Execution Details Object

1. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Auto Number” and Click on Next
4. Fill the Above as following:
 - Field Label : Execution ID
 - Field Name : gets auto generated
 - Click on required check box
 - Click on Next >> Next >> Save and new.

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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+

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

4. Under the Screen Properties:

Label : Venue Details

API Name :

Venue_Details

5. Now lets add components in this flow. Click on Text Component 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:

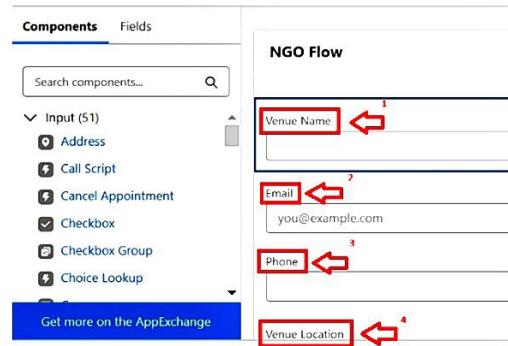
Label : Phone

API Name :

Contact_Phone

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- Venue_Location
9. Click on Number Component and name it as:
- Label : Latitude
 API Name : Latitude
10. Click on Number Component and name it as:
- Label : longitude
 API Name : longitude
11. Next click on Done. This would like below



12. Click on the '+' icon in between Venue details and end, and click on create record element.
13. Now label it as

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Create_Venue_Record

How Many
Records to
Create : One
How to Set the
Record Fields :
Use separate
resources, and
literal values
Object : Venue
Set Field Values
for the Venue :
Click on 'Add
Field' 5 times
Field : Value =
Contact_Email__c
:
{!Contact_Email.value}
Field : Value =
Contact_Phone__c
:
{!Contact_Phone.value}
Field : Value =
Name :
{!Venue_Name}
Field : Value =
Venue_Location__c
:{!location}
Field : Value =
Location_Latitude__s
:{!latitude}

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• LOCATION

```

Field : Value =
Location_Latitude__s
:{!latitude}
Field : Value =
Location_Longitude__s
:{!longitude}

```

14. This would look like:

Create a Record of This Object

* Object
Venue

Set Field Values for the Venue

Field	Contact_Email__c	Value	Aa
Field	Contact_Phone__c	Value	Aa
Field	Name	Value	Aa
Field	Venue_Location__c	Value	Aa

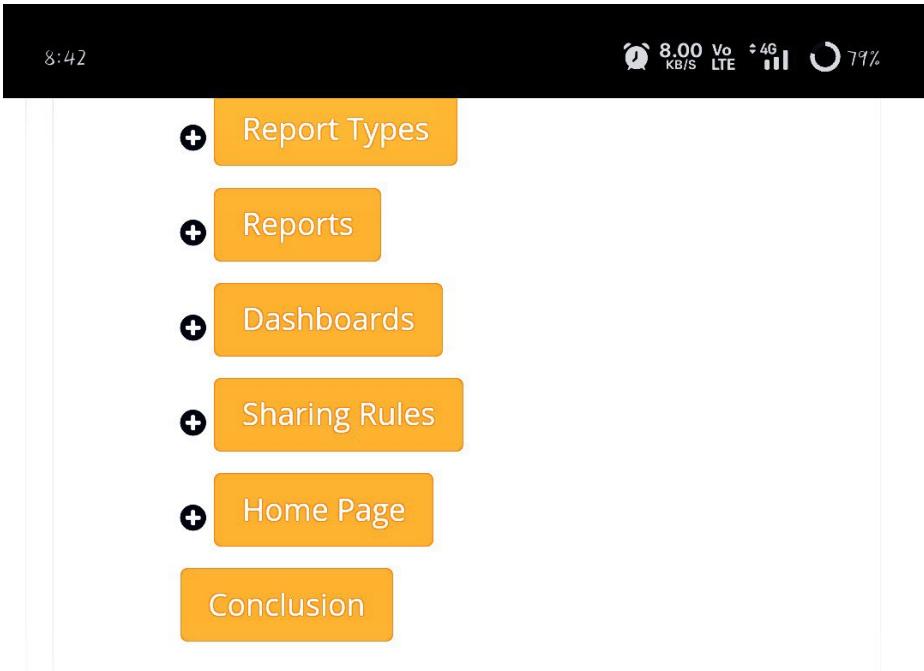
15. Click on Save as:

Flow Label : Venue

Form

Flow API Name :

Venue_Form



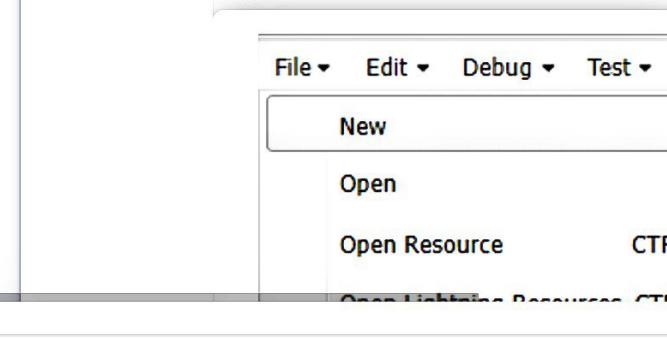
8:42

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- + Report Types
- + Reports
- + Dashboards
- + Sharing Rules
- + Home Page
- Conclusion

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.



- + Report Types
- + Reports
- + Dashboards
- + Sharing Rules
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- Conclusion

Trigger Code

(This Trigger is to assign Distance field to the Distance Calculation field. So that we can assign the distance in the sharing rules.)

Code:

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

+ Report Types

+ Reports

+ Dashboards

+ Sharing Rules

+ Home Page

Conclusion

Creation Of User1

1. Go to setup page >>
type users in Quick
Find bar >> click on
users>> New user.

2. In General
Information give
details as: (Note :
create users as per
your wish NGO's)

First Name :

Iksha
Foundation

Last Name :

Iksha_Foundation

Alias : iiksh

Email : Give
Your Email

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

Nickname :

Auto
Populated

User License .

+ Report Types

+ Reports

+ Dashboards

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+ Home Page

Conclusion

Username

: ikshafoundation@sb.com (give
the username
different)

Nickname :

Auto

Populated

User License :

Salesforce

Platform

Profile : NGOs

Profile

Active : Check

General Information

First Name	Iksha Foundation
Last Name	Iksha_Foundation
Alias	iiksh
Email	bhargavipaila1023@gmail.c
Username	ikshafoundation@sb.com
Nickname	User1711437164226559933 
Title	
Company	
Department	
Division	

S

Click on Save

- [+ Report Types](#)
- [+ Reports](#)
- [+ Dashboards](#)
- [+ Sharing Rules](#)
- [+ Home Page](#)
- [Conclusion](#)

Creation Of User2, User3

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

<input type="checkbox"/> Edit Login	<u>Iksha_Foundation</u>	<u>Iksha Foundation</u>	<u>iksh</u>
<input type="checkbox"/> Edit Login	<u>NSS</u>	<u>NSS</u>	<u>nss</u>
<input type="checkbox"/> Edit Login	<u>Street_Cause</u>	<u>Street Cause</u>	<u>stre</u>

+ Report Types

+ Reports

+ Dashboards

+ Sharing Rules

+ Home Page

Conclusion

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

- Report Types
- Reports
- Dashboards
- Sharing Rules
- Home Page
- Conclusion

Creation Of Public Group 2

1. By Following Steps in Activity 1, Create other two Public Groups for other two users.
2. After Saving this would look like this.

Action	Label ↑	Group Name
Edit Del	<u>Iksha</u>	<u>Iksha</u>
Edit Del	<u>NSS</u>	<u>NSS</u>
Edit Del	<u>Street Cause</u>	<u>Street_Cause</u>

Types

- + Reports
- + Dashboards
- + Sharing Rules
- + Home Page
- Conclusion

Creation Of Report Types

1. Go to setup page >> type Report Types in Quick Find bar >> click on Report Types >> click on Continue >> Click on New Custom Report Type.
2. In Define the Custom Report Type:
Primary Object : Select Venues
Report Type Label : Venue with DropOff with Volunteer
Report Type Name : Venue_with_DropOff_with_Volunteer
Description : Venue with DropOff with Volunteer
Store in Category : Select Other Reports
Deployment Status :

Types

+ Reports

+ Dashboards

+ Sharing Rules

+ Home Page

Conclusion

on New Custom Report Type.

2. In Define the Custom Report Type:

Primary Object : Select Venues

Report Type Label :
Venue with DropOff
with Volunteer

Report Type Name :
Venue_with_DropOff_with_Volunteer

Description : Venue with
DropOff with Volunteer

Store in Category : Select
Other Reports

Deployment Status :
Deployed

3. Click on Next

4. Near Click to relate
another Object Select
Drop-Off Points.

5. And also select "A"
records may or may not
have related "B" records.

6. Now again Near Click to
relate another Object
Select Volunteers.

7. Now click on Save.

Creation Of Report On Volunteers With Execution Details And Tasks

+ Dashboards

+ Sharing Rules

+ Home Page

Conclusion

Creation Of Report On Venue With DropOff With Volunteer

1. Go to the app(FoodConnect) >> click on the reports tab
2. Click on New Folder.
Folder Label :
Custom Reports
Folder Unique Name :
CustomReports
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.

Creation Of Report On Volunteers With Execution Details And Tasks

⊕ Dashboards

⊕ Sharing Rules

⊕ Home Page

Conclusion

The screenshot shows a report configuration interface with two main sections: 'Groups' and 'Columns'.
Groups: This section includes 'GROUP ROWS' with an 'Add group...' button and a search icon. It also includes 'GROUP COLUMNS' with an 'Add group...' button and a search icon.
Columns: This section includes a dropdown menu labeled 'Columns' with a downward arrow, an 'Add column...' button, and a search icon. It lists three columns: 'Venue Name' (selected), 'Drop-Off point Name', and '# Distance'.
Right Panel: This panel displays a summary:

- Volunteer Name:** - (4)
- Subtotal:** Total (4)

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

With volunteer

**Creation Of Report On
Volunteers With
Execution Details And
Tasks**

**Creation Of Report On
Volunteers With
Execution Details And
Tasks**

+ Dashboards

Creation Of Report On Volunteers With Execution Details And Tasks

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

with volunteer

**Creation Of Report On
Volunteers With
Execution Details And
Tasks**

**Creation Of Report On
Volunteers With
Execution Details And
Tasks**

⊕ Dashboards

Task: Date, Task : Rating.

REPORT ▾

Volunteer Task ↗ **Volunteers with Execution Details and Tasks**

Fields > **Outline** ▾ **Filters** ▾

GROUP ROWS Add group... Q

Volunteer ID X

GROUP COLUMNS Add group... Q

Columns Add column... Q

Volunteer: Volunteer Name X

Task: Task Name X

Execution Detail: Execution Detail X

Volunteer: Owner Name X

Task: Date X

Task: Rating X

Previews a limited number of records. Run the report to see more.

Volunteer ID	Volunteer: Volunteer Name	Task: 1
2 (1)	Charan	Task 2
4 (1)	Bhavika	Task 1
Total (2)		

Row Counts Detail Rows Subtotals

7. Now click on Save & Run.

8. Give Label as :

Report
Name :
Volunteer
Task
Report
Unique
Name :
Auto
Populated

1 2 3 4 5 6 7 8 9 10 11 12

with volunteer

Creation Of Report On
Volunteers With
Execution Details And
Tasks

Creation Of Report On
Volunteers With
Execution Details And
Tasks

⊕ Dashboards

Creation Of Report On Volunteers With Execution Details And Tasks

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

8:43

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with volunteer

**Creation Of Report On
Volunteers With
Execution Details And
Tasks**

**Creation Of Report On
Volunteers With
Execution Details And
Tasks**

+ Dashboards

Task Date, Task Rating.

REPORT ▾

Volunteer Task ✎ Volunteers with Execution Details and Tasks

Previewing a limited number of records. Run the report to see all results.		
Volunteer ID	Volunteer: Volunteer Name	Task: 1
2 (1)	Charan	Task 2
4 (1)	Bhavika	Task 1
Total (2)		

7. Now click on Save & Run.

8. Give Label as :

Report
Name :
Volunteer
Task
Report
Unique
Name :
Auto
Populated

1. Click on Select Folder

Creation Of Report On
Volunteers With
Execution Details And
Tasks

Dashboards

Adding Venue And Drop
Off Point Report To The
Dashboard

Adding Volunteer Task
Report To The

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
8. In Add Component:
Display As : Select

8:43

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Creation Of Report On Volunteers With Execution Details And Tasks

Dashboards

Adding Venue And Drop Off Point Report To The Dashboard

Adding Volunteer Task Report To The

5. Click On Widget and select Chart or Table
6. In Select Report : Select venue and Drop Off point Report.
7. Then click on select
8. In Add Component:

Display As : Select Lightning Table

Component Theme : Select Dark (Optional)

Report

venue and Drop Off point X

Use chart settings from report i

Display As



Groups

Add group... Search icon

Columns



1. Now click on save.

Creation Of Report On
Volunteers With
Execution Details And
Tasks

Dashboards

Adding Venue And Drop
Off Point Report To The
Dashboard

Adding Volunteer Task
Report To The

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)

Report

Volunteer Task X

Use chart settings from report i

Display As



X-Axis

Volunteer ID

Y-Axis

1 Now click on save

Adding Volunteer Task Report To The Dashboard

Adding A Picture To The Dashboard (Optional)

+ Sharing Rules

+ Home Page

Conclusion

Adding A Picture To The Dashboard (Optional)

(Note : To upload an image into the Dashboard, we have to first download an image from google or other sources into your system)

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



Adding Volunteer Task Report To The Dashboard

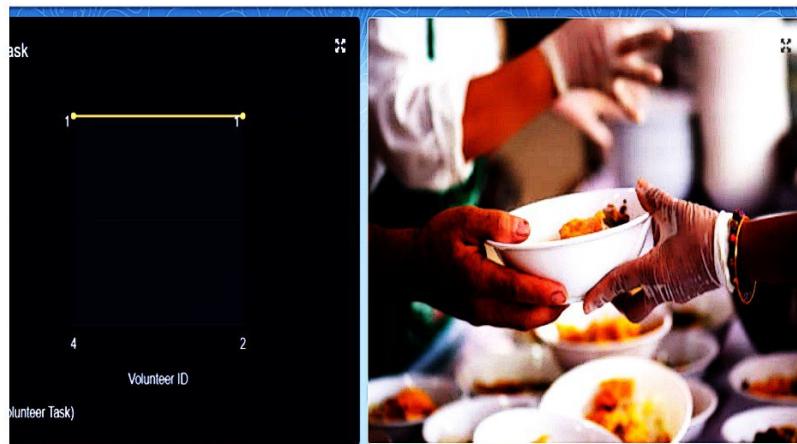
Adding A Picture To The Dashboard (Optional)

Sharing Rules

Home Page

Conclusion

Refresh Edit Subscribe ▾



Adding A Picture To The Dashboard (Optional)

- Sharing Rules

Creation Of Sharing Rules

+ Home Page

Conclusion

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.

Adding A Picture To The Dashboard (Optional)

- Sharing Rules

Creation Of Sharing Rules

+ Home Page

Conclusion

Public Groups :

Iksha

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

Label :

Rule 2

Rule

Name :

Rule_2

9. Select your rule type :
Select Based on criteria.
10. Select which records to be shared:
Field : Operator : Value =
Distance : greater than :
15
Field : Operator : Value =
Distance : less or equal :
30
11. Select the users to share with : Near Share With

Public Groups :

NSS

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

Label : Rule_2

Adding A Picture To The Dashboard (Optional)

Sharing Rules

Creation Of Sharing Rules

Home Page

Conclusion

Rule_3

14. Select your rule type :
Select Based on criteria.
15. Select which records to
be shared:

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

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

Public Groups :
Street Cause

17. Click on Save.

Drop-Off point Sharing Rules

New Recalculate

Action	Criteria
Edit Del	Drop-Off point: Distance LESS OR EQUAL 15
Edit Del	(Drop-Off point: Distance GREATER THAN 15) AND (Drop-Off point: Dis
Edit Del	(Drop-Off point: Distance GREATER THAN 30) AND (Drop-Off point: Dis

Sharing Rules**Creation Of Sharing
Rules****Home Page****Creation Of Home Page****Conclusion**

Creation Of Home Page

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



8:44

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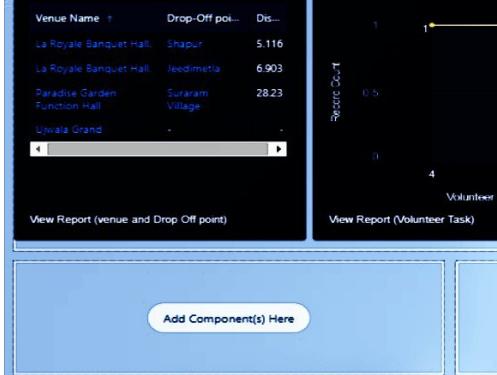
Sharing Rules

Creation Of Sharing Rules

Home Page

Creation Of Home Page

Conclusion

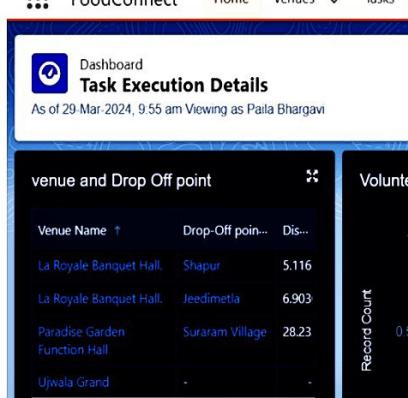


Venue Name ↑ Drop-Off point Dis...
La Royale Banquet Hall, Shapur 5.116
La Royale Banquet Hall, Jeedimetla 6.903
Paradise Garden Function Hall, Suraram Village 28.23
Ujwala Grand - -
View Report (venue and Drop Off point)

1 1
0.5
0
4
Volunteer I
View Report (Volunteer Task)

Add Component(s) Here

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.



FoodConnect Home Venues Tasks

Dashboard Task Execution Details As of 29 Mar 2024, 9:55 am Viewing as Paila Bhargavi

venue and Drop Off point

Venue Name ↑ Drop-Off point Dis...
La Royale Banquet Hall, Shapur 5.116
La Royale Banquet Hall, Jeedimetla 6.903
Paradise Garden Function Hall, Suraram Village 28.23
Ujwala Grand - -

Volunteer Record Count