

# **To Supply Leftover Food to Poor**

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Through: Accenture

Trailhead URL:

<https://www.salesforce.com/trailblazer/a6899k95bzvvznsroo>

# 1.Salesforce Developer Account creation

## 1.1Created Developer Account

Created a developer org in salesforce.

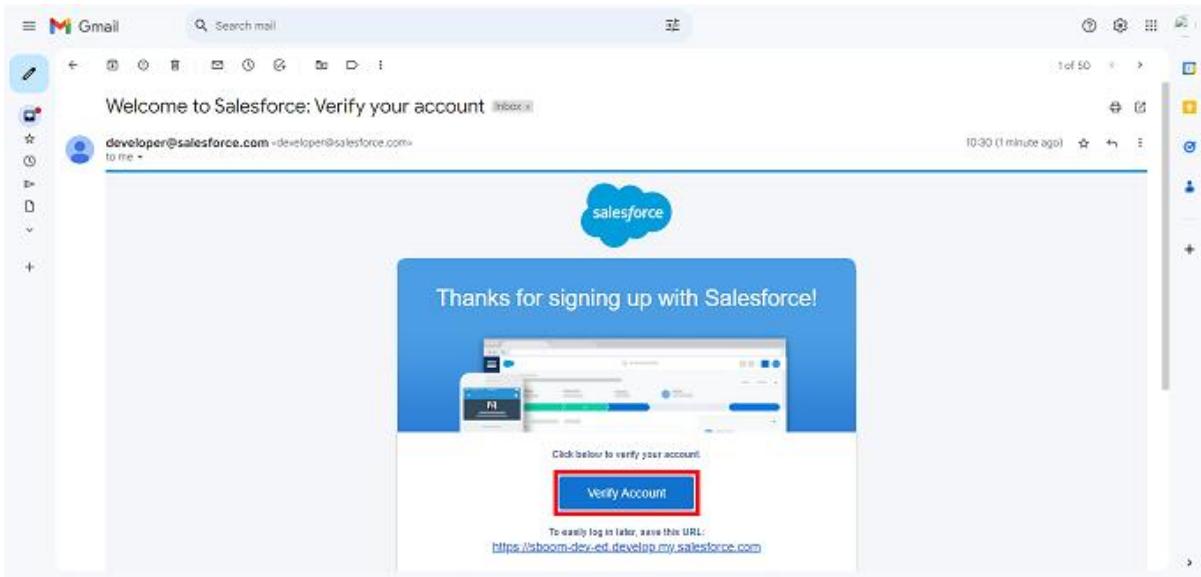
1. Go to <https://developer.salesforce.com/signup>
2. On the sign-up form, enter the following details:
  3. First Name: Sarthak
  4. Last Name: Chaturvedi
  5. Email: sachofficial21@gmail.com
  6. Role: developer
  7. Country: US
  8. State: Colorado
  9. Postal Code: 80013
  10. Username: sarthak.project3@gmail.com

The screenshot shows the Salesforce Developer Account creation sign-up form. The form fields and their values are:

- First Name\*: Sarthak
- Last Name\*: Chaturvedi
- Email\*: sachofficial21@gmail.com
- Role\*: Developer
- Company\*: JIIT Noida
- Country/Region\*: United States
- State/Province\*: Colorado
- Postal Code\*: 380013
- Username\*: sarthak.project3@gmail.com

At the bottom of the form, there is a note about username recommendations and a checked checkbox for agreeing to the Main Services Agreement - Developer Services and Salesforce Program Agreement.

## 1.2 Account Activation



## 2.Object

### 2.1 Created 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
0. Click on Allow reports and Track Field History, Allow Activities.
0. Allow search >> Save.

**Custom Object Information**

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.**

|                         |                                     |                   |
|-------------------------|-------------------------------------|-------------------|
| Label                   | <input type="text" value="Venue"/>  | Example: Account  |
| Plural Label            | <input type="text" value="Venues"/> | Example: Accounts |
| Starts with vowel sound | <input type="checkbox"/>            |                   |

The Object Name is used when referencing the object via the API.

|             |                                    |                  |
|-------------|------------------------------------|------------------|
| Object Name | <input type="text" value="Venue"/> | Example: Account |
|-------------|------------------------------------|------------------|

Description

Context-Sensitive Help Setting

|  |
|--|
| <input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window |
| <input type="radio"/> Open a window using a Visualforce page                             |

Content Name

—None—

**Enter Record Name Label and Format**

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

|             |   |                       |
|-------------|---|-----------------------|
| Record Name | <input type="text" value="Venue Name"/> | Example: Account Name |
|-------------|---|-----------------------|

Data Type

|                                   |                                  |  |
|-----------------------------------|----------------------------------|--|
| <input type="text" value="Text"/> | <input type="button" value="▼"/> | Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type. |
|-----------------------------------|----------------------------------|--|

## 2.2 Created 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
0. Click on Allow reports and Track Field History, Allow Activities
0. Allow search >> Save.

**Custom Object Information**

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.**

|                         |  |                   |
|-------------------------|--|-------------------|
| Label                   | <input type="text" value="Drop-Off Point"/>  | Example: Account  |
| Plural Label            | <input type="text" value="Drop-Off Points"/> | Example: Accounts |
| Starts with vowel sound | <input type="checkbox"/>                     |                   |

The Object Name is used when referencing the object via the API.

|             |   |                  |
|-------------|---|------------------|
| Object Name | <input type="text" value="Drop_Off_Point"/> | Example: Account |
|-------------|---|------------------|

Description

Context-Sensitive Help Setting

|  |
|--|
| <input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window |
| <input type="radio"/> Open a window using a Visualforce page                             |

Content Name

—None—

**Enter Record Name Label and Format**

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

|             |  |                       |
|-------------|--|-----------------------|
| Record Name | <input type="text" value="Drop-Off Point Name"/> | Example: Account Name |
|-------------|--|-----------------------|

Data Type

|                                   |                                  |  |
|-----------------------------------|----------------------------------|--|
| <input type="text" value="Text"/> | <input type="button" value="▼"/> | Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type. |
|-----------------------------------|----------------------------------|--|

## 2.3 Created 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
0. Click on Allow reports and Track Field History, Allow Activities
0. Allow search >> Save.

**Custom Object Information**

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.**

|                         |                                    |                   |
|-------------------------|------------------------------------|-------------------|
| Label                   | <input type="text" value="Task"/>  | Example: Account  |
| Plural Label            | <input type="text" value="Tasks"/> | Example: Accounts |
| Starts with vowel sound | <input type="checkbox"/>           |                   |

The Object Name is used when referencing the object via the API.

|             |                                   |                  |
|-------------|-----------------------------------|------------------|
| Object Name | <input type="text" value="Task"/> | Example: Account |
|-------------|-----------------------------------|------------------|

Description

Context-Sensitive Help Setting

Open the standard Salesforce.com Help & Training window  
 Open a window using a Visualforce page

Content Name

—None— ▾

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name is always capitalized, even if the label name is not.

|             |  |                       |
|-------------|--|-----------------------|
| Record Name | <input type="text" value="Task Name"/> | Example: Account Name |
|-------------|--|-----------------------|

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

## 2.4 Created 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
0. Click on Allow reports and Track Field History, Allow Activities
0. Allow search >> Save.

**Custom Object Information**

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.

|                         |                          |          |          |
|-------------------------|--------------------------|----------|----------|
| Label                   | Volunteer                | Example: | Account  |
| Plural Label            | Volunteers               | Example: | Accounts |
| Starts with vowel sound | <input type="checkbox"/> |          |          |

The Object Name is used when referencing the object via the API.

|             |           |          |         |
|-------------|-----------|----------|---------|
| Object Name | Volunteer | Example: | Account |
|-------------|-----------|----------|---------|

Description

Context-Sensitive Help Setting

|                                  |   |
|----------------------------------|---|
| <input checked="" type="radio"/> | Open the standard Salesforce.com Help & Training window |
| <input type="radio"/>            | Open a window using a Visualforce page                  |

Content Name

|        |   |
|--------|---|
| -None- | ▼ |
|--------|---|

**Enter Record Name Label and Format**

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

|             |                |          |              |
|-------------|----------------|----------|--------------|
| Record Name | Volunteer Name | Example: | Account Name |
|-------------|----------------|----------|--------------|

Data Type

|      |   |
|------|---|
| Text | ▼ |
|------|---|

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

## 2.5 Created 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
0. Click on Allow reports and Track Field History, Allow Activities
0. Allow search >> Save.

**Custom Object Information**

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.

|                         |                          |          |          |
|-------------------------|--------------------------|----------|----------|
| Label                   | Execution Detail         | Example: | Account  |
| Plural Label            | Execution Details        | Example: | Accounts |
| Starts with vowel sound | <input type="checkbox"/> |          |          |

The Object Name is used when referencing the object via the API.

|             |                  |          |         |
|-------------|------------------|----------|---------|
| Object Name | Execution_Detail | Example: | Account |
|-------------|------------------|----------|---------|

Description

Context-Sensitive Help Setting

|                                  |   |
|----------------------------------|---|
| <input checked="" type="radio"/> | Open the standard Salesforce.com Help & Training window |
| <input type="radio"/>            | Open a window using a Visualforce page                  |

Content Name

|        |   |
|--------|---|
| -None- | ▼ |
|--------|---|

**Enter Record Name Label and Format**

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

|             |                       |          |              |
|-------------|-----------------------|----------|--------------|
| Record Name | Execution Detail Name | Example: | Account Name |
|-------------|-----------------------|----------|--------------|

Data Type

|      |   |
|------|---|
| Text | ▼ |
|------|---|

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

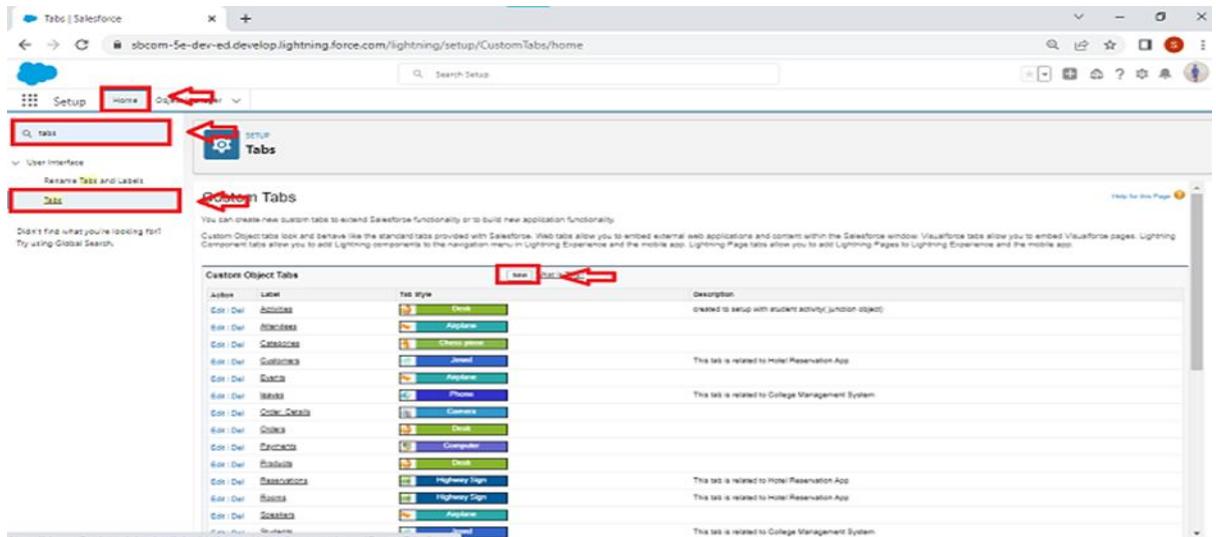
## **3.Tabs**

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

### **3.1 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)



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

### 3.2 Created custom tabs

With the help of above instructions, I created 5 custom tabs for 5 objects

I created before: Venue, Drop-Off point, Task, Volunteer, Execution details.

 **SETUP**  
**Tabs**

Edit Custom Object Tab  
**Venues**

Fill in the fields below to define the custom tab.

**Custom Tab Definition Edit**

**Custom Object Tab Information**

|           |   |
|-----------|---|
| Tab Label | Venues  |
| Object    | <u>Venue</u>  |
| Tab Style |  Whistle  |

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

Enter a short description.

Description

 **SETUP**  
**Tabs**

Edit Custom Object Tab  
**Drop-Off Points**

Fill in the fields below to define the custom tab.

**Custom Tab Definition Edit**

**Custom Object Tab Information**

|           |  |
|-----------|--|
| Tab Label | Drop-Off Points  |
| Object    | <u>Drop-Off Point</u>  |
| Tab Style |  Camera  |

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

Enter a short description.

Description

**SETUP**

## Tabs

Edit Custom Object Tab

### Tasks

Fill in the fields below to define the custom tab.

---

#### Custom Tab Definition Edit

##### Custom Object Tab Information

|           |   |
|-----------|---|
| Tab Label | Tasks   |
| Object    | <u>Task</u>   |
| Tab Style |  Chess piece  |

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

Enter a short description.

|             |                               |
|-------------|-------------------------------|
| Description | <input type="text" value=""/> |
|-------------|-------------------------------|

**SETUP**

## Tabs

Edit Custom Object Tab

### Volunteers

Fill in the fields below to define the custom tab.

---

#### Custom Tab Definition Edit

##### Custom Object Tab Information

|           |  |
|-----------|--|
| Tab Label | Volunteers   |
| Object    | <u>Volunteer</u>   |
| Tab Style |  Hammer  |

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

Enter a short description.

|             |                               |
|-------------|-------------------------------|
| Description | <input type="text" value=""/> |
|-------------|-------------------------------|

**SETUP**

## Tabs

Edit Custom Object Tab

### Execution Details

Fill in the fields below to define the custom tab.

**Custom Tab Definition Edit**

**Custom Object Tab Information**

|           |                         |
|-----------|-------------------------|
| Tab Label | Execution Details       |
| Object    | <u>Execution Detail</u> |
| Tab Style | <b>Cup</b>              |

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

Enter a short description.

Description

**SETUP**

## Tabs

### Custom Tabs

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

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

**Custom Object Tabs**

| Action     | Label                    | Tab Style   |
|------------|--------------------------|-------------|
| Edit   Del | <u>Drop-Off Points</u>   | Camera      |
| Edit   Del | <u>Execution Details</u> | Cup         |
| Edit   Del | <u>Tasks</u>             | Chess piece |
| Edit   Del | <u>Venues</u>            | Whistle     |
| Edit   Del | <u>Volunteers</u>        | Hammer      |

# 4.The Lightning App

## 4.1 Created 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 are tabs for Setup, Home, Object Manager, and a search bar. Below the tabs, there are three buttons: 'Q App manager' (highlighted with a red box), 'Lightning Experience App Manager' (highlighted with a blue box), and 'Cloud Apps(Beta)' (highlighted with a red box). To the right of these buttons are two more buttons: 'New Lightning App' (highlighted with a red box) and 'New Connected App'. The main area displays a list of existing apps with columns for App Name, Developer Name, Description, Last Modified, App Type, and Version. A note at the bottom says 'Quality create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the Winter 23 release notes.' A toggle switch for 'Enable App Cloning' is shown as 'Disabled'.

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 colour hex value: keep this default.

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

The screenshot shows the 'New Lightning App' configuration page. The left sidebar shows a tree view with 'Salesforce', 'Data', 'Apps' (selected), 'Cloud', 'Lightning', 'Mobile', and 'Motors'. Under 'Apps', 'App' is selected. The main area has a title 'New Lightning App' and a sub-section 'App Options'. It contains two main sections: 'Navigation and Form Factor' and 'Setup and Personalization'. In 'Navigation and Form Factor', 'Navigation Style' is set to 'Standard navigation' (radio button selected). In 'Setup and Personalization', 'Setup Experience' is set to 'Setup (full set of Setup options)' (radio button selected). There are also 'App Personalization Settings' with checkboxes for 'Disable end user personalization of nav items in this app' and 'Disable temporary tabs for items outside of this app'. At the bottom, there is a progress bar with several steps completed, and a 'Next' button on the right.

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

5. To Add Navigation Items:

The screenshot shows two panels: 'Available Items' on the left and 'Selected Items' on the right. The 'Available Items' panel contains a search bar and a list of items with icons: Accounts, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations, Approval Requests, Asset Action Sources, and Asset Actions. The 'Selected Items' panel contains a list of items: Home, Venues, Tasks, Drop-Off points, Execution Details, Volunteers, Reports, and Dashboards. Between the two panels are arrows for moving items between them.

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:

The screenshot shows the 'User Profiles' section of the Lightning App Builder. It has two panels: 'Available Profiles' on the left and 'Selected Profiles' on the right. A search bar in the 'Available Profiles' panel shows 'System administrator'. An arrow points from the search bar to the 'Selected Profiles' panel, which contains the profile 'System Administrator'. At the bottom, there is a progress bar with several blue dots and a red-bordered 'Save & Finish' button.

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

## 4.2 Using above instructions, I created the app

SETUP

### Lightning Experience App Manager

23 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

| App Name ↑               | Developer Name           | Description   | Last Modified Date   | App Type  | Visible... |   |
|--------------------------|--------------------------|---|----------------------|-----------|------------|---|
| 4 Automation             | FlowsApp                 | Automate business processes and repetitive tasks.                           | 16/06/2024, 8:44 am  | Lightning | ✓          | ▼ |
| 5 Bolt Solutions         | LightningBolt            | Discover and manage business solutions designed for your industry.          | 09/05/2024, 12:47 am | Lightning | ✓          | ▼ |
| 6 Community              | Community                | Salesforce CRM Communities  | 09/05/2024, 12:45 am | Classic   | ✓          | ▼ |
| 7 Content                | Content                  | Salesforce CRM Content  | 09/05/2024, 12:45 am | Classic   | ✓          | ▼ |
| 8 Data Manager           | DataManager              | Use Data Manager to view limits, monitor usage, and manage recipes.         | 09/05/2024, 12:45 am | Lightning | ✓          | ▼ |
| 9 Digital Experiences    | SalesforceCMS            | Manage content and media for all of your sites.                             | 09/05/2024, 12:45 am | Lightning | ✓          | ▼ |
| 10 FoodConnect           | FoodConnect              |   | 25/06/2024, 5:47 pm  | Lightning | ✓          | ▼ |
| 11 Lightning Usage App   | LightningInstrumentation | View Adoption and Usage Metrics for Lightning Experience                    | 09/05/2024, 12:45 am | Lightning | ✓          | ▼ |
| 12 Marketing CRM Classic | Marketing                | Track sales and marketing efforts with CRM objects.                         | 09/05/2024, 12:45 am | Classic   | ✓          | ▼ |
| 13 Platform              | Platform                 | The fundamental Lightning Platform  | 09/05/2024, 12:45 am | Classic   | ▼          |   |
| 14 Queue Management      | QueueManagement          | Create and manage queues for your business.                                 | 09/05/2024, 12:45 am | Lightning | ✓          | ▼ |
| 15 Sales                 | Sales                    | The world's most popular sales force automation (SFA) solution              | 09/05/2024, 12:45 am | Classic   | ▼          |   |
| 16 Sales                 | LightningSales           | Manage your sales process with accounts, leads, opportunities, and more     | 09/05/2024, 12:45 am | Lightning | ✓          | ▼ |
| 17 Sales Console         | LightningSalesConsole    | (Lightning Experience) Lets sales reps work with multiple records on one... | 09/05/2024, 12:45 am | Lightning | ✓          | ▼ |

**At Number 10 you can see the app "FoodConnect" in the above picture.**

### App Details & Branding

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

#### App Details

\* App Name ⓘ

FoodConnect

\* Developer Name ⓘ

FoodConnect

Description ⓘ

Enter a description...

#### App Branding

Image ⓘ

Upload

Primary Color Hex Value ⓘ

#0070D2

Org Theme Options

Use the app's image and color instead of the org's custom theme

#### App Launcher Preview



## User Profiles

Choose the user profiles that can access this app.

### Available Profiles

| Type to filter list...                              |  |
|---|--|
| <a href="#">Analytics Cloud Integration User</a>    |  |
| <a href="#">Analytics Cloud Security User</a>       |  |
| <a href="#">Authenticated Website</a>               |  |
| <a href="#">Authenticated Website</a>               |  |
| <a href="#">B2B Reordering Portal Buyer Profile</a> |  |
| <a href="#">Contract Manager</a>                    |  |
| <a href="#">Custom: Marketing Profile</a>           |  |
| <a href="#">Custom: Sales Profile</a>               |  |
| <a href="#">Custom: Support Profile</a>             |  |
| <a href="#">Customer Community Login User</a>       |  |
| <a href="#">Customer Community Plus Login User</a>  |  |

### Selected Profiles

| System Administrator |  |
|----------------------|--|
|----------------------|--|

## Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

### Available Items

| Type to filter list...                       |  |
|--|--|
| <a href="#"> Accounts</a>                    |  |
| <a href="#"> All Sites</a>                   |  |
| <a href="#"> Alternative Payment Methods</a> |  |
| <a href="#"> Analytics</a>                   |  |
| <a href="#"> App Launcher</a>                |  |
| <a href="#"> Appointment Categories</a>      |  |
| <a href="#"> Appointment Invitations</a>     |  |
| <a href="#"> Approval Requests</a>           |  |
| <a href="#"> Asset Action Sources</a>        |  |
| <a href="#"> Asset Actions</a>               |  |
| <a href="#"> Assets</a>                      |  |

[Create](#) [▼](#)

### Selected Items

| Home                               |  |
|------------------------------------|--|
| <a href="#"> Home</a>              |  |
| <a href="#"> Venues</a>            |  |
| <a href="#"> Drop-Off Points</a>   |  |
| <a href="#"> Tasks</a>             |  |
| <a href="#"> Volunteers</a>        |  |
| <a href="#"> Execution Details</a> |  |
| <a href="#"> Reports</a>           |  |
| <a href="#"> Dashboards</a>        |  |



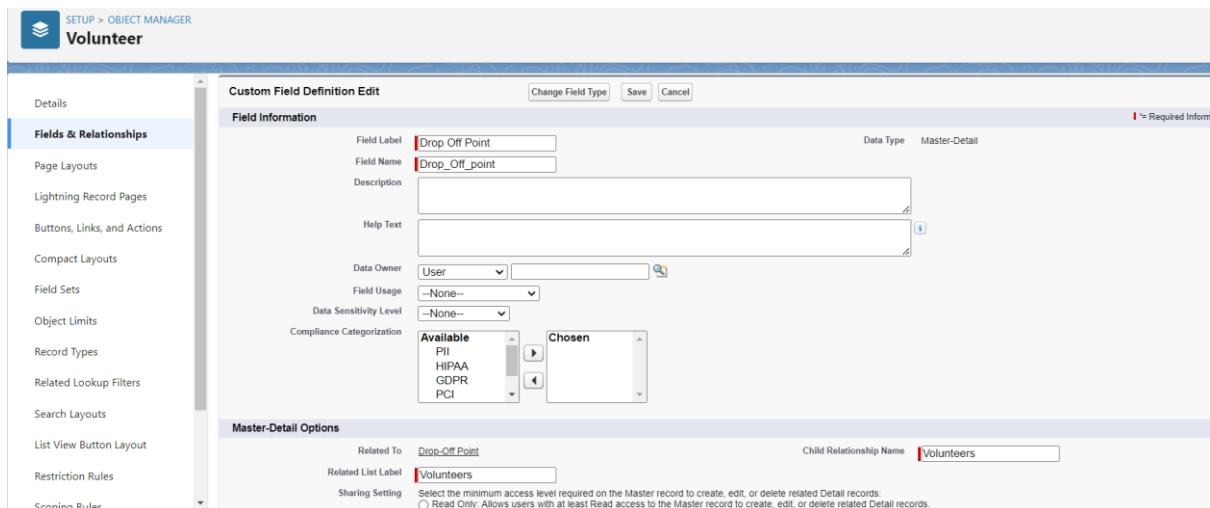
# 5.Fields

## 5.1 Creation of Relationship Fields in Objects

### 1.1.1 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.
0. Now click on “Fields & Relationships” >> New
0. Select Master Detail relationship
0. Select the related object “Drop-Off point” and click next.
0. Field Name: Drop\_Off\_point
0. Field label: Auto generated
0. Next >> Next >> Save.

Created the field as per the above instructions and you can observe all the details in the below image:



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

0. Go to setup >> click on Object Manager >> type object name (Execution Details) in the search bar >> click on the object.
0. Now click on “Fields & Relationships” >> New
0. Select Master Detail relationship
0. Select the related object “Volunteer” and click next.
0. Field Name: Volunteer
0. Field label: Auto generated
0. Next >> Next >> Save.

Created the field as per the above instructions and you can observe all the details in the below image:

The screenshot shows the 'Custom Field Definition Edit' screen for the 'Execution Detail' object. The 'Field Information' section has 'Field Label' set to 'Volunteer' and 'Field Name' set to 'Volunteer'. The 'Data Type' is 'Master-Detail'. In the 'Master-Detail Options' section, 'Related To' is set to 'Volunteer' and 'Child Relationship Name' is set to 'Execution\_Details'. The 'Sharing Setting' dropdown is expanded, showing options like 'Read Only', 'Edit', and 'Delete', with 'Edit' selected.

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

0. Go to setup >> click on Object Manager >> type object name (Execution Details) in the search bar >> click on the object.
0. Now click on “Fields & Relationships” >> New
0. Select Master Detail relationship
0. Select the related object “Task” and click next.
0. Field Name: Task
0. Field label: Auto generated
0. Next >> Next >> Save.

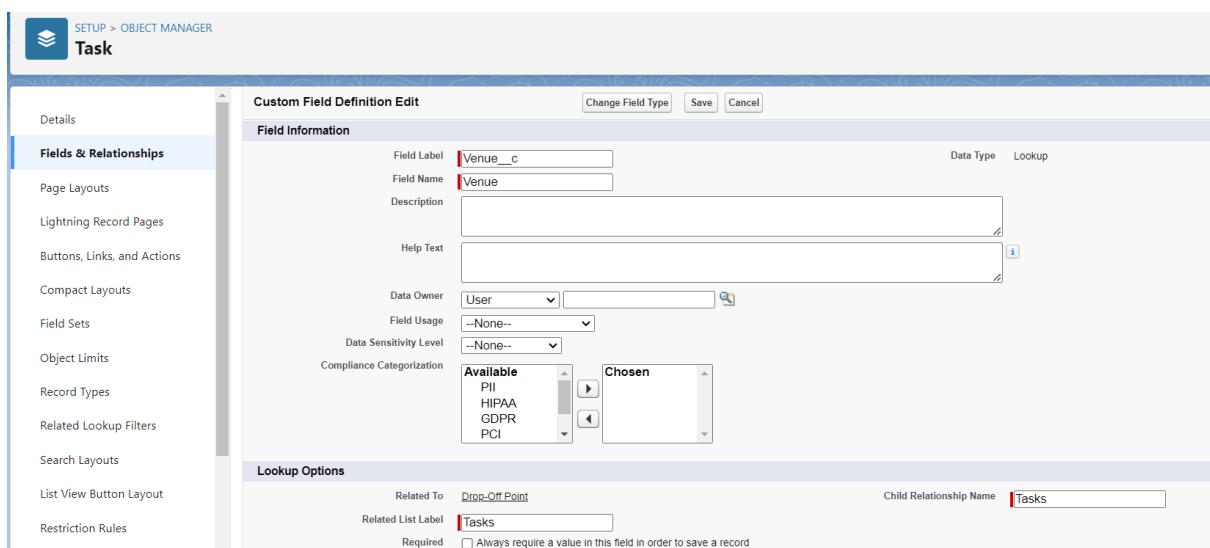
Created the field as per the above instructions and you can observe all the details in the below image:

The screenshot shows the 'Custom Field Definition Edit' screen for the 'Execution Detail' object. The 'Field Information' section has 'Field Label' set to 'Task' and 'Field Name' set to 'Task'. The 'Data Type' is 'Master-Detail'. In the 'Master-Detail Options' section, 'Related To' is set to 'Task' and 'Child Relationship Name' is set to 'Execution\_Details'. The 'Sharing Setting' dropdown is expanded, showing options like 'Read Only', 'Edit', and 'Delete', with 'Edit' selected.

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

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

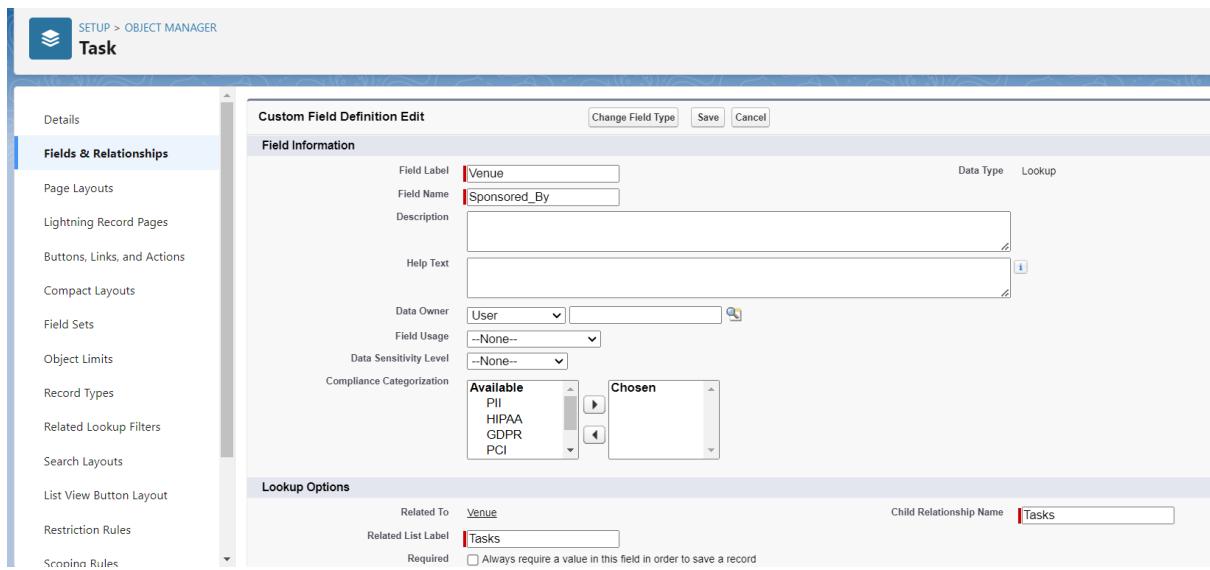
Created the field as per the above instructions and you can observe all the details in the below image:



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

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

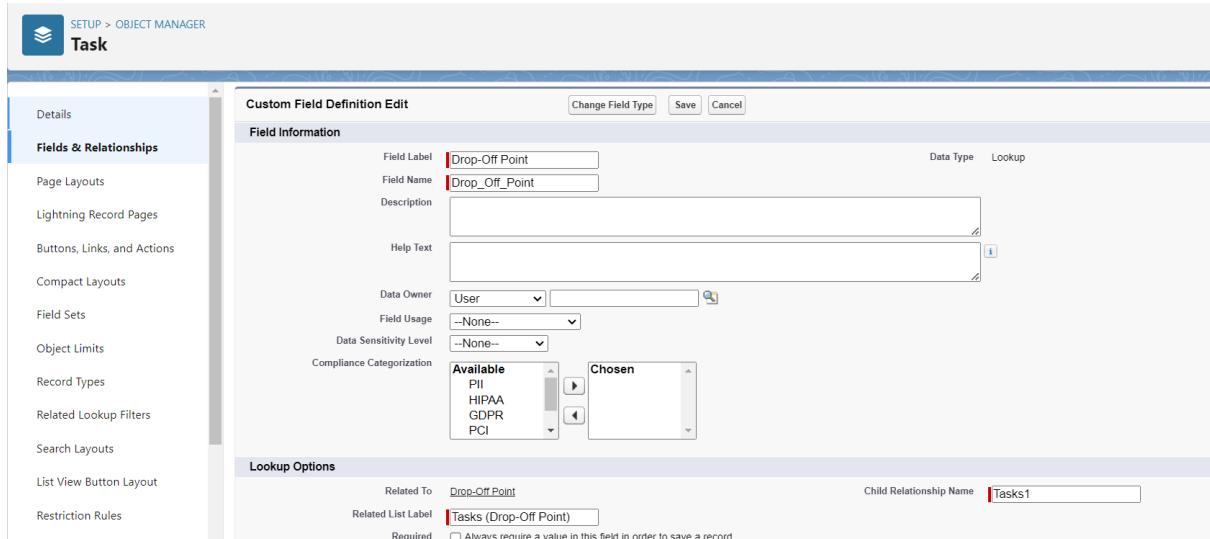
Created the field as per the above instructions and you can observe all the details in the below image:



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

0. Go to setup>> click on Object Manager >> type object name (Task) in the search bar >> click on the object.
0. Now click on “Fields & Relationships” >> New
0. Select Lookup relationship
0. Select the related object “Drop-Off point” and click next.
0. Field Name: Drop-Off point
0. Field label: Auto generated
0. Next >> Next >> Save.

Created the field as per the above instructions and you can observe all the details in the below image:



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

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

1. Select Lookup relationship
1. Select the related object “Venue” and click next.
1. Field Name: Drop-Off point
1. Field label: Auto generated
1. Next >> Next >> Save.

Created the field as per the above instructions and you can observe all the details in the below image:

## 5.2 Creation of Fields for The Venue Object

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

**To create another fields in an object:**

0. Go to setup >> click on Object Manager >> type object name (Venue) in search bar >> click on the object.
0. Now click on “Fields & Relationships” >> New
0. Select Data type as a “Phone” and Click on Next
0. 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.

The screenshot shows the Salesforce Setup > Object Manager interface for the 'Venue' object. On the left sidebar, under 'Fields & Relationships', 'Custom Fields' is selected. In the main content area, a new custom field named 'Contact Phone' is being defined. The 'Field Information' section includes the following details:

|                           | Value           | Object Name | Object Type |
|---------------------------|-----------------|-------------|-------------|
| Field Label               | Contact Phone   | Venue       |             |
| Field Name                | Contact_Phone   |             | Phone       |
| API Name                  | Contact_Phone_c |             |             |
| Description               |                 |             |             |
| Help Text                 |                 |             |             |
| Data Owner                |                 |             |             |
| Field Usage               |                 |             |             |
| Data Sensitivity Level    |                 |             |             |
| Compliance Categorization |                 |             |             |

Below this, the 'General Options' section shows 'Required' checked and 'Default Value' as empty. Under 'Validation Rules', it says 'No validation rules defined.'

### To create another fields in an object:

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

### To create another fields in an object:

0. Go to setup >> click on Object Manager >> type object name (Venue) in search bar >> click on the object.
0. Now click on “Fields & Relationships” >> New
0. Select Data type as a “Long Text Area” and Click on Next
0. Fill the Above as following:
  - Field Label: Venue Location
  - Field Name: Venue\_Location and Click on Next >> Next >> Save and new

## 5.3 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.

The screenshot shows the 'Object Manager' interface for the 'Drop-Off Point' object. On the left, a sidebar lists various layout types: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The 'Fields & Relationships' tab is selected. In the main area, a custom field named 'Location 2' is being defined. The 'Custom Field Definition Detail' section includes fields for Field Label ('Location 2'), Field Name ('Location\_2'), API Name ('Location\_2\_c'), Description ('Enter the Geolocation of the Drop off Point'), Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. It also shows the object name ('Drop-Off Point') and data type ('Geolocation'). The 'General Options' section indicates it is required. The 'Geolocation Options' section specifies a decimal of 4. The bottom right shows the created date ('25/06/2024, 6:17 pm') and modified date ('25/06/2024, 6:17 pm').

### 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.

The screenshot shows the 'Object Manager' interface for the 'Drop-Off Point' object. The sidebar and navigation are identical to the previous screenshot. A new custom field named 'distance calculation' is being defined. The 'Custom Field Definition Detail' section includes fields for Field Label ('distance calculation'), Field Name ('distance\_calculation'), API Name ('distance\_calculation\_\_c'), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. It also shows the object name ('Drop-Off Point') and data type ('Formula'). The 'Formula Options' section specifies a data type of 'Formula' with a formula of 'DISTANCE( Location\_2\_\_c , Venue\_\_r.Location\_\_c , 'km')'. The bottom right shows the created date ('25/06/2024, 11:34 pm') and modified date ('25/06/2024, 11:46 pm').

### To create another fields in an object:

0. Go to setup >> click on Object Manager >> type object name(Drop-Off point) in search bar >> click on the object.
0. Now click on “Fields & Relationships” >> New
0. Select Data type as a “Picklist” and Click on Next
0. Fill the Above as following:

- Field Label : State
- Field Name : State
- Enter values, with each value separated by a new line :  
Andhra Pradesh  
Arunachal Pradesh  
Assam  
Bihar  
Chhattisgarh  
Goa  
Gujarat  
Haryana  
Himachal Pradesh  
Jharkhand  
Karnataka  
Kerala  
Maharashtra  
Madhya Pradesh  
Manipur  
Meghalaya  
Mizoram  
Nagaland  
Odisha  
Punjab  
Rajasthan  
Sikkim  
Tamil Nadu  
Tripura  
Telangana  
Uttar Pradesh  
Uttarakhand  
West Bengal  
Andaman & Nicobar (UT)  
Chandigarh (UT)  
Dadra & Nagar Haveli and Daman & Diu (UT)  
Delhi [National Capital Territory (NCT)]  
Jammu & Kashmir (UT)  
Ladakh (UT)  
Lakshadweep (UT)  
Puducherry (UT)
- Click on required check box
- Click on Next >> Next >> Save and new.

The screenshot shows the Salesforce Setup interface for creating a custom field named 'State' on the 'Drop-Off Point' object. The 'Fields & Relationships' tab is selected. The 'Custom Field Definition Detail' section includes fields for Field Label (State), Field Name (State), API Name (State\_\_c), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, and a 'Required' checkbox which is checked. The 'Object Name' is 'Drop-Off Point' and the 'Data Type' is 'Picklist'. The 'Created By' and 'Modified By' fields show 'Srinath Parasaganji' with the timestamp '25/06/2024, 6:50 pm'. Below this, there are sections for 'General Options' and 'Picklist Options', both of which have a checked checkbox. A table at the bottom lists all the states defined in the picklist.

| Action   | Values            | API Name          | Default                  | Chart Colors         | Modified By                              |
|--|-------------------|-------------------|--------------------------|----------------------|--|
| <input type="checkbox"/> Edit   Del   Deactivate | Andhra Pradesh    | Andhra Pradesh    | <input type="checkbox"/> | Assigned dynamically | Srinath Parasaganji, 25/06/2024, 6:50 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Arunachal Pradesh | Arunachal Pradesh | <input type="checkbox"/> | Assigned dynamically | Srinath Parasaganji, 25/06/2024, 6:50 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Assam             | Assam             | <input type="checkbox"/> | Assigned dynamically | Srinath Parasaganji, 25/06/2024, 6:50 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Bihar             | Bihar             | <input type="checkbox"/> | Assigned dynamically | Srinath Parasaganji, 25/06/2024, 6:50 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Chhattisgarh      | Chhattisgarh      | <input type="checkbox"/> | Assigned dynamically | Srinath Parasaganji, 25/06/2024, 6:50 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Goa               | Goa               | <input type="checkbox"/> | Assigned dynamically | Srinath Parasaganji, 25/06/2024, 6:50 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Gujarat           | Gujarat           | <input type="checkbox"/> | Assigned dynamically | Srinath Parasaganji, 25/06/2024, 6:50 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Haryana           | Haryana           | <input type="checkbox"/> | Assigned dynamically | Srinath Parasaganji, 25/06/2024, 6:50 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Himachal Pradesh  | Himachal Pradesh  | <input type="checkbox"/> | Assigned dynamically | Srinath Parasaganji, 25/06/2024, 6:50 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Jharkhand         | Jharkhand         | <input type="checkbox"/> | Assigned dynamically | Srinath Parasaganji, 25/06/2024, 6:50 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Karnataka         | Karnataka         | <input type="checkbox"/> | Assigned dynamically | Srinath Parasaganji, 25/06/2024, 6:50 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Kerala            | Kerala            | <input type="checkbox"/> | Assigned dynamically | Srinath Parasaganji, 25/06/2024, 6:50 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Maharashtra       | Maharashtra       | <input type="checkbox"/> | Assigned dynamically | Srinath Parasaganji, 25/06/2024, 6:50 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Madhya Pradesh    | Madhya Pradesh    | <input type="checkbox"/> | Assigned dynamically | Srinath Parasaganji, 25/06/2024, 6:50 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Manipur           | Manipur           | <input type="checkbox"/> | Assigned dynamically | Srinath Parasaganji, 25/06/2024, 6:50 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Meghalaya         | Meghalaya         | <input type="checkbox"/> | Assigned dynamically | Srinath Parasaganji, 25/06/2024, 6:50 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Mizoram           | Mizoram           | <input type="checkbox"/> | Assigned dynamically | Srinath Parasaganji, 25/06/2024, 6:50 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Nagaland          | Nagaland          | <input type="checkbox"/> | Assigned dynamically | Srinath Parasaganji, 25/06/2024, 6:50 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Odisha            | Odisha            | <input type="checkbox"/> | Assigned dynamically | Srinath Parasaganji, 25/06/2024, 6:50 pm |
| <input type="checkbox"/> Edit   Del   Deactivate | Punjab            | Punjab            | <input type="checkbox"/> | Assigned dynamically | Srinath Parasaganji, 25/06/2024, 6:50 pm |

### To create another fields in an object:

0. Go to setup >> click on Object Manager >> type object name(Drop-Off point) in search bar >> click on the object.
0. Now click on “Fields & Relationships” >> New
0. Select Data type as a “Number” and Click on Next
0. 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

The screenshot shows the Salesforce Object Manager interface for the 'Drop-Off Point' object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area is titled 'Drop-Off Point Custom Field Distance'. It displays the 'Custom Field Definition Detail' page with tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section shows the field label 'Distance', field name 'Distance', API name 'Distance\_\_c', and data type 'Number'. The 'General Options' section includes a 'Required' checkbox which is checked. Other options like 'Unique', 'External ID', and 'AI Prediction' are available but unchecked.

## 5.4 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.

The screenshot shows the 'Custom Field Definition Edit' page for the 'Task' object. The field is named 'Task ID' with the API name 'Task\_ID'. The 'Data Type' is set to 'Auto Number'. The 'Field Information' section includes fields for 'Description', 'Help Text', 'Data Owner' (set to 'User'), 'Field Usage' (set to '--None--'), 'Data Sensitivity Level' (set to '--None--'), and 'Compliance Categorization' (with 'Available' options PII, HIPAA, GDPR, PCI and 'Chosen' option Chosen). The 'General Options' section contains an 'External ID' checkbox which is unchecked. A note at the bottom states: 'External ID: Check this field as the unique record identifier from an external system.'

**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.

Edit Task Custom Field  
Date

**Custom Field Definition Edit** Change Field Type Save Cancel

**Field Information**

|                           |   |           |      |                  |               |     |  |       |  |      |  |     |  |
|---------------------------|---|-----------|------|------------------|---------------|-----|--|-------|--|------|--|-----|--|
| Field Label               | Date  | Data Type | Date |                  |               |     |  |       |  |      |  |     |  |
| Field Name                | Date  |           |      |                  |               |     |  |       |  |      |  |     |  |
| Description               |   |           |      |                  |               |     |  |       |  |      |  |     |  |
| Help Text                 |   |           |      |                  |               |     |  |       |  |      |  |     |  |
| Data Owner                | User  | Search    |      |                  |               |     |  |       |  |      |  |     |  |
| Field Usage               | -None-  |           |      |                  |               |     |  |       |  |      |  |     |  |
| Data Sensitivity Level    | -None-  |           |      |                  |               |     |  |       |  |      |  |     |  |
| Compliance Categorization | <table border="1"><tr><td><b>Available</b></td><td><b>Chosen</b></td></tr><tr><td>PII</td><td></td></tr><tr><td>HIPAA</td><td></td></tr><tr><td>GDPR</td><td></td></tr><tr><td>PCI</td><td></td></tr></table> |           |      | <b>Available</b> | <b>Chosen</b> | PII |  | HIPAA |  | GDPR |  | PCI |  |
| <b>Available</b>          | <b>Chosen</b>   |           |      |                  |               |     |  |       |  |      |  |     |  |
| PII                       |   |           |      |                  |               |     |  |       |  |      |  |     |  |
| HIPAA                     |   |           |      |                  |               |     |  |       |  |      |  |     |  |
| GDPR                      |   |           |      |                  |               |     |  |       |  |      |  |     |  |
| PCI                       |   |           |      |                  |               |     |  |       |  |      |  |     |  |

**General Options**

**To create another fields in an object:**

0. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
0. Now click on “Fields & Relationships” >> New
0. Select Data type as a “Picklist (Multi-Select)” and Click on Next
0. 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.

Edit Task Custom Field  
Food Category

**Custom Field Definition Edit** Change Field Type Promote to Global Value Set Save Cancel

**Field Information**

|                           |   |                      |                         |
|---------------------------|---|----------------------|-------------------------|
| Field Label               | <input type="text" value="Food Category"/>  | Data Type            | Picklist (Multi-Select) |
| Field Name                | <input type="text" value="Food_Category"/>  |                      |                         |
| Description               | <input type="text"/>  |                      |                         |
| Help Text                 | <input type="text"/>  |                      |                         |
| Data Owner                | User <input type="button" value="..."/>   | <input type="text"/> |                         |
| Field Usage               | --None-- <input type="button" value="..."/>   |                      |                         |
| Data Sensitivity Level    | --None-- <input type="button" value="..."/>   |                      |                         |
| Compliance Categorization | <div style="display: flex; align-items: center;"> <div style="flex: 1;"> <b>Available</b><br/>           PII<br/>           HIPAA<br/>           GDPR<br/>           PCI         </div> <div style="margin: 0 10px;"> <input type="button" value="&gt;"/> <input type="button" value="&lt;"/> </div> <div style="flex: 1;"> <b>Chosen</b> </div> </div> |                      |                         |

**General Options**

**To create another fields in an object:**

0. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
0. Now click on “Fields & Relationships” >> New
0. Select Data type as a “Number” and Click on Next
0. Fill the Above as following:
  - Field Label : Number of People Served
  - Field Name : Number\_of\_People\_Served
  - Click on required check box
  - Click on Next >> Next >> Save and new.

Edit Task Custom Field  
Number of People Served

**Custom Field Definition Edit** Change Field Type Save Cancel

**Field Information**

|                           |   |                      |        |
|---------------------------|---|----------------------|--------|
| Field Label               | <input type="text" value="Number of People Served"/>  | Data Type            | Number |
| Field Name                | <input type="text" value="Number_of_People_Served"/>  |                      |        |
| Description               | <input type="text"/>  |                      |        |
| Help Text                 | <input type="text"/>  |                      |        |
| Data Owner                | User <input type="button" value="..."/>   | <input type="text"/> |        |
| Field Usage               | --None-- <input type="button" value="..."/>   |                      |        |
| Data Sensitivity Level    | --None-- <input type="button" value="..."/>   |                      |        |
| Compliance Categorization | <div style="display: flex; align-items: center;"> <div style="flex: 1;"> <b>Available</b><br/>           PII<br/>           HIPAA<br/>           GDPR<br/>           PCI         </div> <div style="margin: 0 10px;"> <input type="button" value="&gt;"/> <input type="button" value="&lt;"/> </div> <div style="flex: 1;"> <b>Chosen</b> </div> </div> |                      |        |

**General Options**

**To create another fields in an object:**

0. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
0. Now click on “Fields & Relationships” >> New
0. Select Data type as a “Text” and Click on Next
0. Fill the Above as following:
  - Field Label : Name of the Person
  - Field Name : Name\_of\_the\_Person
  - Click on Next >> Next >> Save and new.

Edit Task Custom Field  
**Name of the Person**

**Custom Field Definition Edit** Change Field Type Save Cancel

**Field Information**

| Field Label: <input type="text" value="Name of the Person"/><br>Field Name: <input type="text" value="Name_of_the_Person"/><br>Description:<br>Help Text:<br>Data Owner: <input type="text" value="User"/> <input type="button" value="..."/><br>Field Usage: <input type="text" value="--None--"/><br>Data Sensitivity Level: <input type="text" value="--None--"/><br>Compliance Categorization: <table border="1" style="display: inline-table; vertical-align: middle;"> <tr><th>Available</th><th>Chosen</th></tr> <tr><td>PII</td><td></td></tr> <tr><td>HIPAA</td><td></td></tr> <tr><td>GDPR</td><td></td></tr> <tr><td>PCI</td><td></td></tr> </table> | Available | Chosen | PII |  | HIPAA |  | GDPR |  | PCI |  | Data Type: <input type="text" value="Text"/> |
|---|-----------|--------|-----|--|-------|--|------|--|-----|--|--|
| Available   | Chosen    |        |     |  |       |  |      |  |     |  |  |
| PII   |           |        |     |  |       |  |      |  |     |  |  |
| HIPAA   |           |        |     |  |       |  |      |  |     |  |  |
| GDPR  |           |        |     |  |       |  |      |  |     |  |  |
| PCI   |           |        |     |  |       |  |      |  |     |  |  |

**To create another fields in an object:**

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

Edit Task Custom Field  
**Phone**

**Custom Field Definition Edit** Change Field Type Save Cancel

**Field Information**

| Field Label: <input type="text" value="Phone"/><br>Field Name: <input type="text" value="Phone"/><br>Description:<br>Help Text:<br>Data Owner: <input type="text" value="User"/> <input type="button" value="..."/><br>Field Usage: <input type="text" value="--None--"/><br>Data Sensitivity Level: <input type="text" value="--None--"/><br>Compliance Categorization: <table border="1" style="display: inline-table; vertical-align: middle;"> <tr><th>Available</th><th>Chosen</th></tr> <tr><td>PII</td><td></td></tr> <tr><td>HIPAA</td><td></td></tr> <tr><td>GDPR</td><td></td></tr> <tr><td>PCI</td><td></td></tr> </table> | Available | Chosen | PII |  | HIPAA |  | GDPR |  | PCI |  | Data Type: <input type="text" value="Phone"/> |
|---|-----------|--------|-----|--|-------|--|------|--|-----|--|---|
| Available   | Chosen    |        |     |  |       |  |      |  |     |  |   |
| PII   |           |        |     |  |       |  |      |  |     |  |   |
| HIPAA   |           |        |     |  |       |  |      |  |     |  |   |
| GDPR  |           |        |     |  |       |  |      |  |     |  |   |
| PCI   |           |        |     |  |       |  |      |  |     |  |   |

**To create another fields in an object:**

0. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
0. Now click on “Fields & Relationships” >> New
0. Select Data type as a “Pick List” and Click on Next
0. Fill the Above as following:
  - Field Label : Rating
  - Field Name : Rating
  - Enter values, with each value separated by a new line :

2  
3  
4  
5

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

Edit Task Custom Field  
**Rating**

Custom Field Definition Edit      Change Field Type      Promote to Global Value Set      Save      Cancel

**Field Information**

|                           |   |           |          |
|---------------------------|---|-----------|----------|
| Field Label               | Rating  | Data Type | Picklist |
| Field Name                | Rating  |           |          |
| Description               |   |           |          |
| Help Text                 |   |           |          |
| Data Owner                | User  |           |          |
| Field Usage               | --None--  |           |          |
| Data Sensitivity Level    | --None--  |           |          |
| Compliance Categorization | <b>Available</b><br>PII<br>HIPAA<br>GDPR<br>PCI <b>Chosen</b> |           |          |

**To create another fields in an object:**

0. Go to setup >> click on Object Manager >> type object name(Task) in search bar >> click on the object.
0. Now click on “Fields & Relationships” >> New
0. Select Data type as a “Long Text Area” and Click on Next
0. Fill the Above as following:
  - Field Label : Feedback
  - Field Name : Feedback
  - Click on Next >> Next >> Save and new.

Edit Task Custom Field  
**Feedback**

Custom Field Definition Edit      Change Field Type      Save      Cancel

**Field Information**

|                           |   |           |                |
|---------------------------|---|-----------|----------------|
| Field Label               | Feedback  | Data Type | Long Text Area |
| Field Name                | Feedback  |           |                |
| Description               |   |           |                |
| Help Text                 |   |           |                |
| Data Owner                | User  |           |                |
| Field Usage               | --None--  |           |                |
| Data Sensitivity Level    | --None--  |           |                |
| Compliance Categorization | <b>Available</b><br>PII<br>HIPAA<br>GDPR<br>PCI <b>Chosen</b> |           |                |

## 5.5 Creation of Fields for The Volunteer Object

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

Edit Volunteer Custom Field  
Volunteer ID

| Custom Field Definition Edit |  | <a href="#">Change Field Type</a> | <a href="#">Save</a> | <a href="#">Cancel</a> |                  |               |     |  |       |  |      |  |     |  |
|------------------------------|--|-----------------------------------|----------------------|------------------------|------------------|---------------|-----|--|-------|--|------|--|-----|--|
| <b>Field Information</b>     |  |                                   |                      |                        |                  |               |     |  |       |  |      |  |     |  |
| Field Label                  | <input type="text" value="Volunteer ID"/>  | Data Type    Auto Number          |                      |                        |                  |               |     |  |       |  |      |  |     |  |
| Field Name                   | <input type="text" value="Volunteer_ID"/>  |                                   |                      |                        |                  |               |     |  |       |  |      |  |     |  |
| Description                  | <input type="text"/>   |                                   |                      |                        |                  |               |     |  |       |  |      |  |     |  |
| Help Text                    | <input type="text"/>   |                                   |                      |                        |                  |               |     |  |       |  |      |  |     |  |
| Data Owner                   | User   | <input type="text"/>              | <a href="#">...</a>  |                        |                  |               |     |  |       |  |      |  |     |  |
| Field Usage                  | <input type="text" value="--None--"/>  |                                   |                      |                        |                  |               |     |  |       |  |      |  |     |  |
| Data Sensitivity Level       | <input type="text" value="--None--"/>  |                                   |                      |                        |                  |               |     |  |       |  |      |  |     |  |
| Compliance Categorization    | <table border="1"> <tr> <td><b>Available</b></td> <td><b>Chosen</b></td> </tr> <tr> <td>PII</td> <td></td> </tr> <tr> <td>HIPAA</td> <td></td> </tr> <tr> <td>GDPR</td> <td></td> </tr> <tr> <td>PCI</td> <td></td> </tr> </table> |                                   |                      |                        | <b>Available</b> | <b>Chosen</b> | PII |  | HIPAA |  | GDPR |  | PCI |  |
| <b>Available</b>             | <b>Chosen</b>  |                                   |                      |                        |                  |               |     |  |       |  |      |  |     |  |
| PII                          |  |                                   |                      |                        |                  |               |     |  |       |  |      |  |     |  |
| HIPAA                        |  |                                   |                      |                        |                  |               |     |  |       |  |      |  |     |  |
| GDPR                         |  |                                   |                      |                        |                  |               |     |  |       |  |      |  |     |  |
| PCI                          |  |                                   |                      |                        |                  |               |     |  |       |  |      |  |     |  |

### To create another fields in an object:

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

**Gender**

**Custom Field Definition Edit** Change Field Type Promote to Global Value Set Save Cancel

**Field Information**

|                           |   |                      |          |
|---------------------------|---|----------------------|----------|
| Field Label               | <input type="text" value="Gender"/>   | Data Type            | Picklist |
| Field Name                | <input type="text" value="Gender"/>   |                      |          |
| Description               | <input type="text"/>  |                      |          |
| Help Text                 | <input type="text"/>  |                      |          |
| Data Owner                | User  | <input type="text"/> |          |
| Field Usage               | <input type="text" value="--None--"/>   |                      |          |
| Data Sensitivity Level    | <input type="text" value="--None--"/>   |                      |          |
| Compliance Categorization | <div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 10px;">Available</div> <div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 10px;">PII</div> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 10px;">HIPAA</div> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 10px;">GDPR</div> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 10px;">PCI</div> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 10px;">Chosen</div> </div> |                      |          |

**To create another fields in an object:**

0. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
0. Now click on “Fields & Relationships” >> New
0. Select Data type as a “Date” and Click on Next
0. 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.

**Available On**

**Custom Field Definition Edit** Change Field Type Save Cancel

**Field Information**

|                           |   |                      |      |
|---------------------------|---|----------------------|------|
| Field Label               | <input type="text" value="Available On"/>   | Data Type            | Date |
| Field Name                | <input type="text" value="Available_On"/>   |                      |      |
| Description               | <input type="text"/>  |                      |      |
| Help Text                 | <input type="text"/>  |                      |      |
| Data Owner                | User  | <input type="text"/> |      |
| Field Usage               | <input type="text" value="--None--"/>   |                      |      |
| Data Sensitivity Level    | <input type="text" value="--None--"/>   |                      |      |
| Compliance Categorization | <div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 10px;">Available</div> <div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 10px;">PII</div> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 10px;">HIPAA</div> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 10px;">GDPR</div> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 10px;">PCI</div> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 10px;">Chosen</div> </div> |                      |      |

**To create another fields in an object:**

0. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
0. Now click on “Fields & Relationships” >> New
0. Select Data type as a “Number” and Click on Next
0. Fill the Above as following:
  - Field Label : Age
  - Field Name : Age

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

Edit Volunteer Custom Field  
Age

**Custom Field Definition Edit** Change Field Type

**Field Information**

|  |                  |               |                             |  |  |
|--|------------------|---------------|-----------------------------|--|--|
| Field Label: <input type="text" value="Age"/><br>Field Name: <input type="text" value="Age"/><br>Description:<br><div style="border: 1px solid #ccc; height: 40px; margin-top: 5px;"></div><br>Help Text:<br><div style="border: 1px solid #ccc; height: 40px; margin-top: 5px;"></div><br>Data Owner: <input type="button" value="User"/> <input type="text"/><br>Field Usage: <input type="button" value="--None--"/><br>Data Sensitivity Level: <input type="button" value="--None--"/><br>Compliance Categorization: <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"><b>Available</b></td> <td style="padding: 5px; text-align: center;"><b>Chosen</b></td> </tr> <tr> <td style="padding: 5px; vertical-align: top;">           PII<br/>           HIPAA<br/>           GDPR<br/>           PCI         </td> <td style="padding: 5px; vertical-align: top;"></td> </tr> </table> | <b>Available</b> | <b>Chosen</b> | PII<br>HIPAA<br>GDPR<br>PCI |  | Data Type: <input type="button" value="Number"/> |
| <b>Available</b>   | <b>Chosen</b>    |               |                             |  |  |
| PII<br>HIPAA<br>GDPR<br>PCI  |                  |               |                             |  |  |

#### To create another fields in an object:

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

Edit Volunteer Custom Field  
Email

**Custom Field Definition Edit** Change Field Type

**Field Information**

|  |                  |               |                             |  |   |
|--|------------------|---------------|-----------------------------|--|---|
| Field Label: <input type="text" value="Email"/><br>Field Name: <input type="text" value="Email"/><br>Description:<br><div style="border: 1px solid #ccc; height: 40px; margin-top: 5px;"></div><br>Help Text:<br><div style="border: 1px solid #ccc; height: 40px; margin-top: 5px;"></div><br>Data Owner: <input type="button" value="User"/> <input type="text"/><br>Field Usage: <input type="button" value="--None--"/><br>Data Sensitivity Level: <input type="button" value="--None--"/><br>Compliance Categorization: <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"><b>Available</b></td> <td style="padding: 5px; text-align: center;"><b>Chosen</b></td> </tr> <tr> <td style="padding: 5px; vertical-align: top;">           PII<br/>           HIPAA<br/>           GDPR<br/>           PCI         </td> <td style="padding: 5px; vertical-align: top;"></td> </tr> </table> | <b>Available</b> | <b>Chosen</b> | PII<br>HIPAA<br>GDPR<br>PCI |  | Data Type: <input type="button" value="Email"/> |
| <b>Available</b>   | <b>Chosen</b>    |               |                             |  |   |
| PII<br>HIPAA<br>GDPR<br>PCI  |                  |               |                             |  |   |

#### To create another fields in an object:

0. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
  0. Now click on “Fields & Relationships” >> New
  0. Select Data type as a “Number” and Click on Next
  0. 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.

Edit Volunteer Custom Field  
Contact Number

**Custom Field Definition Edit** Change Field Type

**Field Information**

|                           |  |           |        |
|---------------------------|--|-----------|--------|
| Field Label               | <input type="text" value="Contact Number"/>  | Data Type | Number |
| Field Name                | <input type="text" value="Contact_Number"/>  |           |        |
| Description               | <input type="text"/>   |           |        |
| Help Text                 | <input type="text"/>   |           |        |
| Data Owner                | User <input type="button" value="..."/>  |           |        |
| Field Usage               | --None-- <input type="button" value="..."/>  |           |        |
| Data Sensitivity Level    | --None-- <input type="button" value="..."/>  |           |        |
| Compliance Categorization | <div style="display: flex; align-items: center;"> <div style="flex: 1;"> <b>Available</b><br/>           PII<br/>           HIPAA<br/>           GDPR<br/>           PCI         </div> <span style="margin: 0 10px;"><input type="button" value="&lt;--"/></span> <div style="flex: 1;"> <b>Chosen</b> </div> <span style="margin: 0 10px;"><input type="button" value="--&gt;"/></span> </div> |           |        |

#### To create another fields in an object:

0. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
0. Now click on “Fields & Relationships” >> New
0. Select Data type as a “Text Area (Long)” and Click on Next
0. Fill the Above as following:
  - Field Label : Address
  - Field Name : Address
  - Click on Next >> Next >> Save and new.

Edit Volunteer Custom Field  
Address

**Custom Field Definition Edit** Change Field Type

**Field Information**

|                           |  |           |                |
|---------------------------|--|-----------|----------------|
| Field Label               | <input type="text" value="Address"/>   | Data Type | Long Text Area |
| Field Name                | <input type="text" value="Address"/>   |           |                |
| Description               | <input type="text"/>   |           |                |
| Help Text                 | <input type="text"/>   |           |                |
| Data Owner                | User <input type="button" value="..."/>  |           |                |
| Field Usage               | --None-- <input type="button" value="..."/>  |           |                |
| Data Sensitivity Level    | --None-- <input type="button" value="..."/>  |           |                |
| Compliance Categorization | <div style="display: flex; align-items: center;"> <div style="flex: 1;"> <b>Available</b><br/>           PII<br/>           HIPAA<br/>           GDPR<br/>           PCI         </div> <span style="margin: 0 10px;"><input type="button" value="&lt;--"/></span> <div style="flex: 1;"> <b>Chosen</b> </div> <span style="margin: 0 10px;"><input type="button" value="--&gt;"/></span> </div> |           |                |

#### To create another fields in an object:

0. Go to setup >> click on Object Manager >> type object name(Volunteer) in search bar >> click on the object.
0. Now click on “Fields & Relationships” >> New
0. Select Data type as a “Date” and Click on Next
0. Fill the Above as following:

- Field Label : Date of Birth
- Field Name : Date\_of\_Birth
- Click on Next >> Next >> Save and new.

Edit Volunteer Custom Field

### Date of Birth

**Custom Field Definition Edit**

**Field Information**

|                           |  |               |      |
|---------------------------|--|---------------|------|
| Field Label               | Date of Birth  | Data Type     | Date |
| Field Name                | Date_of_Birth  |               |      |
| Description               |  |               |      |
| Help Text                 |  |               |      |
| Data Owner                | User   | [Search icon] |      |
| Field Usage               | --None--   |               |      |
| Data Sensitivity Level    | --None--   |               |      |
| Compliance Categorization | <div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px;">Available</div> <div style="margin: 0 10px;">PII<br/>HIPAA<br/>GDPR<br/>PCI</div> <div style="border: 1px solid #ccc; padding: 2px; margin-left: 10px;">Chosen</div> </div> |               |      |

### 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.
1. Now click on “Fields & Relationships” >> New
1. Select Data type as a “text” and Click on Next
1. Fill the Above as following:
  - Field Label : Owner Name
  - Field Name : Owner Name
  - Click on Next >> Next >> Save and new.

Edit Volunteer Custom Field

### Owner Name

**Custom Field Definition Edit**

**Field Information**

|                           |  |               |      |
|---------------------------|--|---------------|------|
| Field Label               | Owner Name   | Data Type     | Text |
| Field Name                | Owner_Name   |               |      |
| Description               |  |               |      |
| Help Text                 |  |               |      |
| Data Owner                | User   | [Search icon] |      |
| Field Usage               | --None--   |               |      |
| Data Sensitivity Level    | --None--   |               |      |
| Compliance Categorization | <div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px;">Available</div> <div style="margin: 0 10px;">PII<br/>HIPAA<br/>GDPR<br/>PCI</div> <div style="border: 1px solid #ccc; padding: 2px; margin-left: 10px;">Chosen</div> </div> |               |      |

## 5.6 Creation of Fields for The Execution Details Object

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

2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Auto Number” and Click on Next
4. Fill the Above as following:
  - Field Label : Execution ID
  - Field Name : gets auto generated
  - Click on required check box
  - Click on Next >> Next >> Save and new.

Edit Volunteer Custom Field

### Execution ID

**Custom Field Definition Edit**

Change Field Type Save Cancel

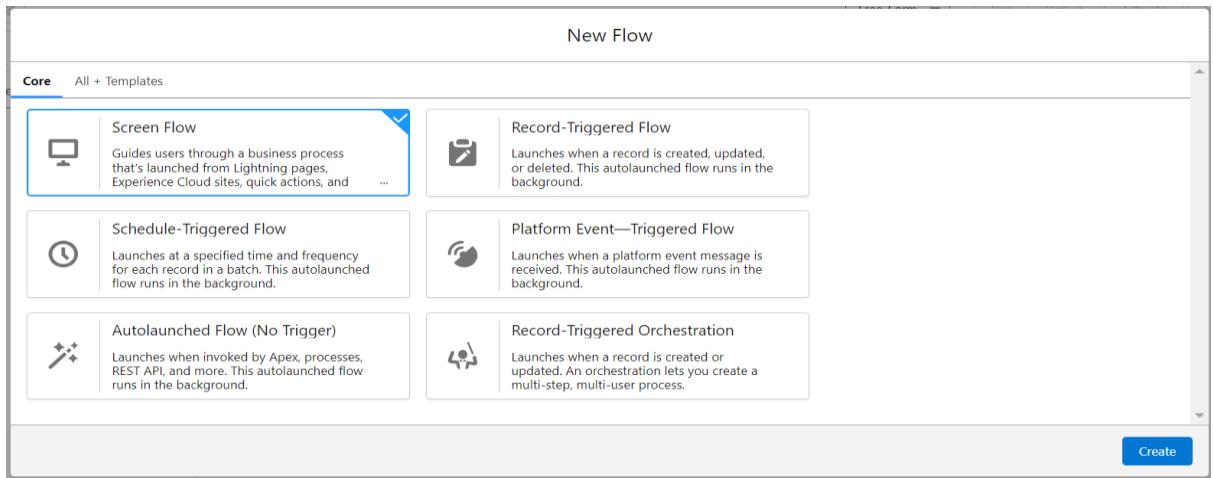
**Field Information**

|                           |   |           |             |
|---------------------------|---|-----------|-------------|
| Field Label               | Execution ID                                    | Data Type | Auto Number |
| Field Name                | Execution_ID                                    |           |             |
| Description               |   |           |             |
| Help Text                 |   |           |             |
| Data Owner                | User  |           |             |
| Field Usage               | --None--  |           |             |
| Data Sensitivity Level    | --None--  |           |             |
| Compliance Categorization | <b>Available</b><br>PII<br>HIPAA<br>GDPR<br>PCI |           |             |
|                           | <b>Chosen</b>                                   |           |             |

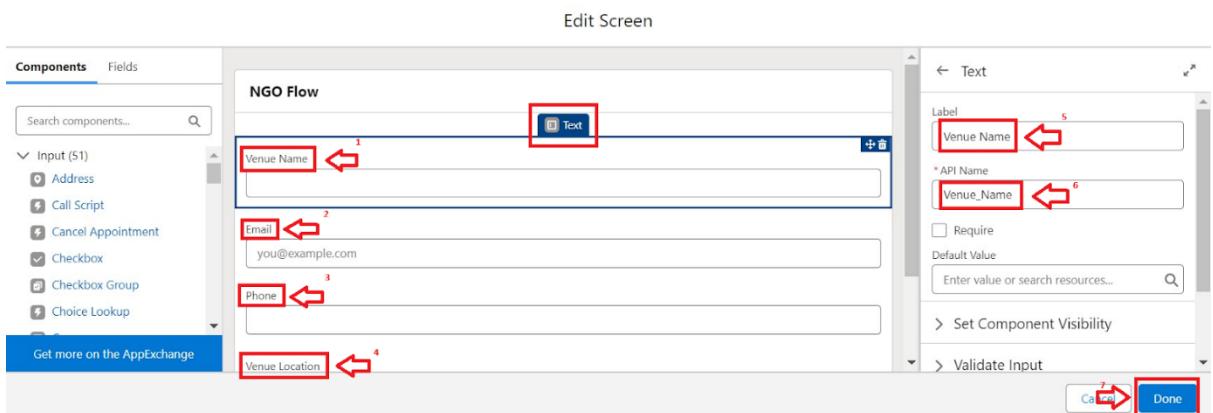
## 6.Flow

### 6.1 Created 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.



0. Click on the '+' icon in between start and end, and click on screen element.
0. Under the Screen Properties:
  - Label : Venue Details
  - API Name : Venue\_Details
0. Now lets add components in this flow. Click on Text Component and name it as:
  - Label : Venue Name
  - API Name : Venue\_Name
0. Click on Email Component and name it as:
  - Label : Email
  - API Name : Contact\_Email
0. Click on Phone Component and name it as:
  - Label : Phone
  - API Name : Contact\_Phone
0. Click on Text Component and name it as:
  - Label : Venue Location
  - API Name : Venue\_Location
0. Click on Number Component and name it as:
  - Label : Latitude
  - API Name : Latitude
0. Click on Number Component and name it as:
  - Label : longitude
  - API Name : longitude
0. Next click on Done. This would like below



0. Click on the '+' icon in between Venue details and end, and click on create record element.
0. Now label it as
  - Label : Create Venue Record
  - API Name : Create\_Venue\_Record
  - How Many Records to Create : One
  - How to Set the Record Fields : Use separate resources, and literal values

Object : Venue  
 Set Field Values for the Venue : Click on ‘Add Field’ 5 times  
 Field : Value = Contact\_Email\_\_c : {!Contact\_Email.value}  
 Field : Value = Contact\_Phone\_\_c : {!Contact\_Phone.value}  
 Field : Value = Name : {!Venue\_Name}  
 Field : Value = Venue\_Location\_\_c : {!location}  
 Field : Value = Location\_Latitude\_\_s : {!latitude}  
 Field : Value = Location\_Longitude\_\_s : {!longitude}

- This would look like:

Create a Record of This Object

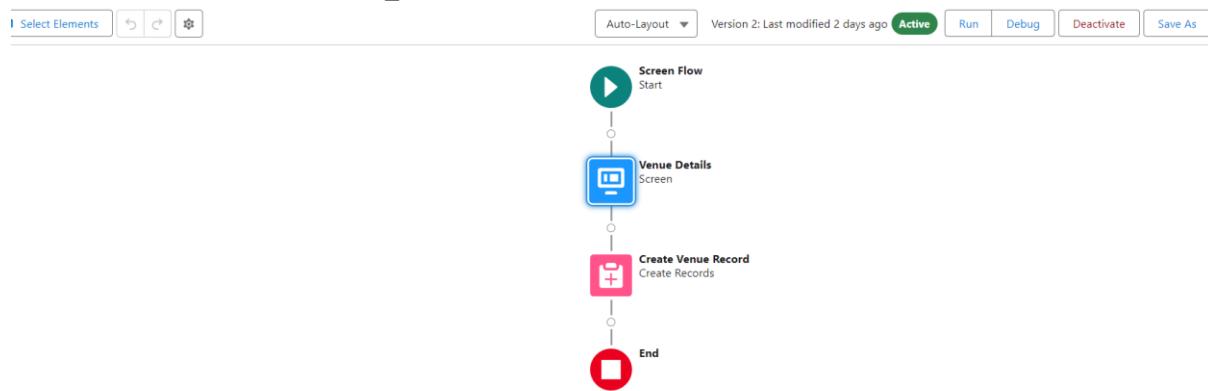
|          |       |
|----------|-------|
| * Object | Venue |
|----------|-------|

---

Set Field Values for the Venue

|       |                   |       |                             |  |
|-------|-------------------|-------|-----------------------------|--|
| Field | Contact_Email__c  | Value | A_a Contact_Email > Value X |  |
| Field | Contact_Phone__c  | Value | A_a Contact_Phone > Value X |  |
| Field | Name              | Value | A_a Venue_Name X            |  |
| Field | Venue_Location__c | Value | A_a location X              |  |

- Click on Save as:  
 Flow Label : Venue Form  
 Flow API Name : Venue\_Form

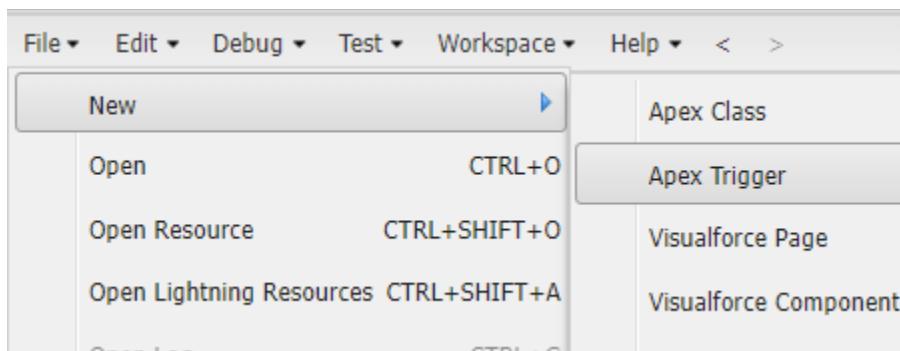


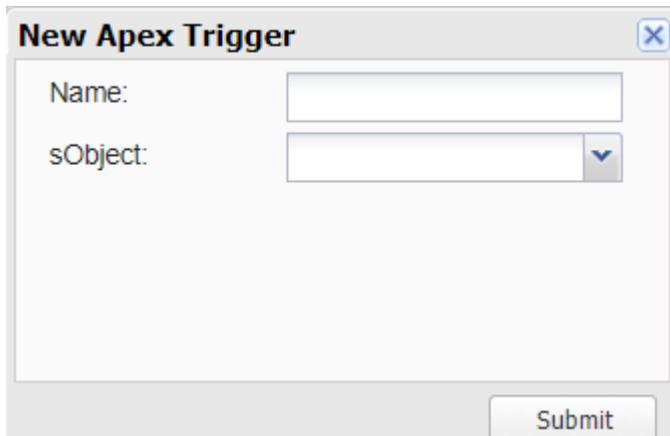
In the above picture, you can see a screen named **Venue Details** and Created records named **Create Venue Record**.

# 7. Trigger

## 7.1 Created 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.





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

## 7.2 Trigger Code

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

### Code:

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

```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
DropOffTrigger.apxt
Code Coverage: None API Version: 61
1 trigger DropOffTrigger on Drop_Off_point__c (before insert) {
2
3     for(Drop_Off_point__c Drop : Trigger.new){
4
5         Drop.Distance__c = Drop.distance_calculation__c;
6
7     }
8
9 }
```

## 8. Profiles

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

1. Then click on Save

The screenshot shows the Salesforce Profiles page. At the top, there is a header with a user icon, the word 'SETUP', and the title 'Profiles'. Below the header, the page title is 'Profiles'. There are navigation links for 'All Profiles' (with a dropdown arrow), 'Edit', 'Delete', and 'Create New View'. A 'New Profile' button is visible. On the right, there is a navigation bar with letters A through O. The main content area displays a table with columns: 'Action', 'Profile Name' (sorted by ascending name), 'User License', and 'Custom'. A single row is shown, representing the newly created profile 'NGOs Profile' with 'Salesforce Platform' as the User License and a checked 'Custom' checkbox. There is also a small checkmark icon next to the 'Custom' checkbox.

| Action   | Profile Name | User License        | Custom                              |
|--|--------------|---------------------|-------------------------------------|
| <a href="#">Edit</a>   <a href="#">Del</a>   ... | NGOs Profile | Salesforce Platform | <input checked="" type="checkbox"/> |

## 9. Creation Of Users

### 9.1 Creation of User1

1. Go to setup page >> type users in Quick Find bar >> click on users>> New user.
2. First Name : Iksha Foundation  
Last Name : Iksha\_Foundation  
Alias : iiksh  
Nickname : Auto Populated  
User License : Salesforce Platform  
Profile : NGOs Profile  
Active : Check

| General Information |                             |                           |                                     |
|---------------------|-----------------------------|---------------------------|-------------------------------------|
| First Name          | Iksha Foundation            | Role                      | <None Specified>                    |
| Last Name           | Iksha_Foundation            | User License              | Salesforce Platform                 |
| Alias               | iiksh                       | Profile                   | NGOs Profile                        |
| Email               | bhargavipaila1023@gmail.com | Active                    | <input checked="" type="checkbox"/> |
| Username            | ikshafoundation@sb.com      | Marketing User            | <input type="checkbox"/>            |
| Nickname            | User1711437164226559933     | Offline User              | <input type="checkbox"/>            |
| Title               |                             | Knowledge User            | <input type="checkbox"/>            |
| Company             |                             | Flow User                 | <input type="checkbox"/>            |
| Department          |                             | Service Cloud User        | <input type="checkbox"/>            |
| Division            |                             | Site.com Contributor User | <input type="checkbox"/>            |

0. Click on Save

### 9.2 Creation of User2, User2

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.

Using above instructions, I created two more users and they are:

User Edit hanish taragala

User Edit

General Information

|            |                         |
|------------|-------------------------|
| First Name | hanish                  |
| Last Name  | taragala                |
| Alias      | htara                   |
| Email      | hanish53863563@gmail.co |
| Username   | hanish53863563@gmail.co |
| Nickname   | User171934061184570561  |
| Title      | (empty)                 |
| Company    | (empty)                 |
| Department | (empty)                 |
| Division   | (empty)                 |

|                                   |                                     |
|-----------------------------------|-------------------------------------|
| Role                              | <None Specified>                    |
| User License                      | Salesforce Platform                 |
| Profile                           | NGOs Profile                        |
| Active                            | <input checked="" type="checkbox"/> |
| Marketing User                    | <input type="checkbox"/>            |
| Offline User                      | <input type="checkbox"/>            |
| Knowledge User                    | <input type="checkbox"/>            |
| Flow User                         | <input type="checkbox"/>            |
| Service Cloud User                | <input type="checkbox"/>            |
| Site.com Contributor User         | <input type="checkbox"/>            |
| Site.com Publisher User           | <input type="checkbox"/>            |
| WDC User                          | <input type="checkbox"/>            |
| Data.com User Type                | --None--                            |
| Data.com Monthly Addition Limit   | 300                                 |
| Accessibility Mode (Classic Only) | <input type="checkbox"/>            |

User Edit bhuvan kandhi

User Edit

General Information

|            |                         |
|------------|-------------------------|
| First Name | bhuvan                  |
| Last Name  | kandhi                  |
| Alias      | bkand                   |
| Email      | bhuvan5645456@gmail.cor |
| Username   | bhuvan5645456@gmail.cor |
| Nickname   | User171934068014669687  |
| Title      | (empty)                 |
| Company    | (empty)                 |
| Department | (empty)                 |
| Division   | (empty)                 |

|                                   |                                     |
|-----------------------------------|-------------------------------------|
| Role                              | <None Specified>                    |
| User License                      | Salesforce Platform                 |
| Profile                           | NGOs Profile                        |
| Active                            | <input checked="" type="checkbox"/> |
| Marketing User                    | <input type="checkbox"/>            |
| Offline User                      | <input type="checkbox"/>            |
| Knowledge User                    | <input type="checkbox"/>            |
| Flow User                         | <input type="checkbox"/>            |
| Service Cloud User                | <input type="checkbox"/>            |
| Site.com Contributor User         | <input type="checkbox"/>            |
| Site.com Publisher User           | <input type="checkbox"/>            |
| WDC User                          | <input type="checkbox"/>            |
| Data.com User Type                | --None--                            |
| Data.com Monthly Addition Limit   | 300                                 |
| Accessibility Mode (Classic Only) | <input type="checkbox"/>            |

# 10. Public Groups

## 10.1 Creation of Public Group 1

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

The screenshot shows the 'Public Groups' setup screen. At the top, there is a blue header bar with a user icon and the word 'SETUP'. Below it, the main title 'Public Groups' is displayed. The page has a light blue decorative background. The main content area is titled 'Group Membership' and shows 'Group: Iksha'. A sub-section titled 'Edit Public Group' contains fields for 'Label' (set to 'Iksha') and 'Group Name' (set to 'Iksha'), both with an information icon. A checkbox for 'Grant Access Using Hierarchies' is checked. Below this is a search bar with 'Public Groups' and a 'Find' button. The interface includes two lists: 'Available Members' on the left and 'Selected Members' on the right. The 'Available Members' list shows 'Group: bhuvan' and 'Group: hanish'. The 'Selected Members' list shows 'Iksha Foundation' and 'Srinath Parasagani'. Between the two lists are 'Add' and 'Remove' buttons with arrows.

## 10.2 Creation of Public Group 2

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

---

| Public Groups  |   |            |                    |                      | <a href="#">Help for this Page</a>   |
|--|---|------------|--------------------|----------------------|---|
| 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. |   |            |                    |                      |   |
| Action   | Label  | Group Name | Created By         | Created Date         |   |
| <a href="#">Edit</a>   <a href="#">Del</a>   | bhuwan  | bhuwan     | Parasagani_Srinath | 26/06/2024, 12:12 am | <a href="#">New</a>   |
| <a href="#">Edit</a>   <a href="#">Del</a>   | hanish  | hanish     | Parasagani_Srinath | 26/06/2024, 12:12 am | <a href="#">A</a>   <a href="#">B</a>   <a href="#">C</a>   <a href="#">D</a>   <a href="#">E</a>   <a href="#">F</a>   <a href="#">G</a>   <a href="#">H</a>   <a href="#">I</a>   <a href="#">J</a>   <a href="#">K</a>   <a href="#">L</a>   <a href="#">M</a>   <a href="#">N</a>   <a href="#">O</a>   <a href="#">P</a>   <a href="#">Q</a>   <a href="#">R</a>   <a href="#">S</a>   <a href="#">T</a>   <a href="#">U</a>   <a href="#">V</a>   <a href="#">W</a>   <a href="#">X</a>   <a href="#">Y</a>   <a href="#">Z</a>   Other  |
| <a href="#">Edit</a>   <a href="#">Del</a>   | Iksha   | Iksha      | Parasagani_Srinath | 26/06/2024, 12:11 am |   |

## 11. Report Types

### 11.1 Creation of Report Types

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

Primary Object: Select 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

0. Click on Next

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

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

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

0. Now click on Save

The screenshot shows the 'Report Types' setup screen under the 'SETUP' tab. The primary object is set to 'Venues'. In the 'Identification' section, the report type label is 'Venue with DropOff with Volunteer' and the name is 'Venue\_with\_DropOff\_with\_Volunteer'. A note states that the description will be visible to users who create reports, and the description field contains 'Venue with DropOff with Volunteer'. The report type category is 'Other Reports'. In the 'Deployment' section, the deployment status is set to 'Deployed'. At the bottom, there are 'Save' and 'Cancel' buttons.

## 12. Reports

### 12.1 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

0. Open Custom Reports and click on New Report
0. Select Report Type: Venue with DropOff with Volunteer

0. Then click on Start Report.
0. In GROUP ROWS: Add Volunteer Name
0. In Columns: Add Venue Name, Drop-Off point Name, Distance.

The screenshot shows the Zoho Reports interface. On the left, the 'Outline' tab is selected, displaying 'Groups' (GROUP ROWS) and 'Columns' (Venue Name, Drop-Off point Name, # Distance). On the right, the 'Filters' tab is selected, showing a preview of 4 records. The columns are: Volunteer Name, Venue Name, Drop-Off point Name, and Distance. The data is as follows:

|                  | Volunteer Name ↑ | Venue Name ↑                  | Drop-Off point Name ↓ | Distance ↓ |
|------------------|------------------|-------------------------------|-----------------------|------------|
| - (4)            |                  | La Royale Banquet Hall.       | Shapur                | 5.1161     |
|                  |                  | La Royale Banquet Hall.       | Jeedimetla            | 6,902.9995 |
|                  |                  | Paradise Garden Function Hall | Suraram Village       | 28.2332    |
|                  |                  | Ujwala Grand                  | -                     | -          |
| <b>Subtotal</b>  |                  |                               |                       | 6,936.3488 |
| <b>Total (4)</b> |                  |                               |                       | 6,936.3488 |

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

## 12.2 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.

The screenshot shows the Zoho Report Builder interface. At the top, there's a toolbar with 'REPORT ▾', 'Volunteer Task', 'Volunteers with Execution Details and Tasks', and various buttons like 'Add Chart', 'Save & Run', 'Save', 'Close', and 'Run'. Below the toolbar is a preview area with a message: 'Previewing a limited number of records. Run the report to see everything.' A checkbox 'Update Preview Automatically' is checked. On the left, there's a sidebar with sections for 'Outline' (selected), 'Filters', 'GROUP ROWS' (with 'Add group...'), 'Volunteer ID' (with 'x'), 'GROUP COLUMNS' (with 'Add group...'), 'Columns' (with 'Add column...'), and a list of selected columns: 'Volunteer: Volunteer Name', 'Task: Task Name', 'Execution Detail: Execution Detail', 'Volunteer: Owner Name', 'Task: Date', and 'Task: Rating'. At the bottom of the preview area, there are checkboxes for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total', all of which are checked.

| Volunteer ID     | Volunteer: Volunteer Name | Task: Task Name | Execution Detail: Execution Detail Name | Volunteer: Owner Name | Task: Date | Task: Rating |
|------------------|---------------------------|-----------------|---|-----------------------|------------|--------------|
| 2 (1)            | Charan                    | Task 2          | Execution 2                             | Iksha Foundation      | 28/03/2024 | 5            |
| <b>Subtotal</b>  |                           |                 |   |                       |            |              |
| 4 (1)            | Bhavika                   | Task 1          | Execution 1                             | Iksha Foundation      | 28/03/2024 | 4            |
| <b>Subtotal</b>  |                           |                 |   |                       |            |              |
| <b>Total (2)</b> |                           |                 |   |                       |            |              |

0. Now click on Save & Run.
0. Give Label as :
  - Report Name : Volunteer Task
  - Report Unique Name : Auto Populated
1. Click on Select Folder and select Custom Report, then click on Save.

## 13.Dashboards

### 13.1 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

0. Open Custom Dashboards and click on New Dashboards
0. Name: Organization Details
0. Click on Widget and select Chart or Table

0. In Select Report: Select venue and Drop Off point Report.
0. Then click on select
0. In Add Component:  
Display As: Select Lightning Table  
Component Theme: Select Dark (Optional)

The screenshot shows the Lightning Report builder interface. On the left, under 'Report', there is a search bar with 'venue and Drop Off point' and a clear button. A checkbox labeled 'Use chart settings from report' has an information icon next to it. Under 'Display As', there are several icons representing different chart types, and one icon is highlighted in blue. Below that are sections for 'Groups' (with an 'Add group...' button) and 'Columns' (with a search icon). On the right, the 'Preview' section shows a table with the following data:

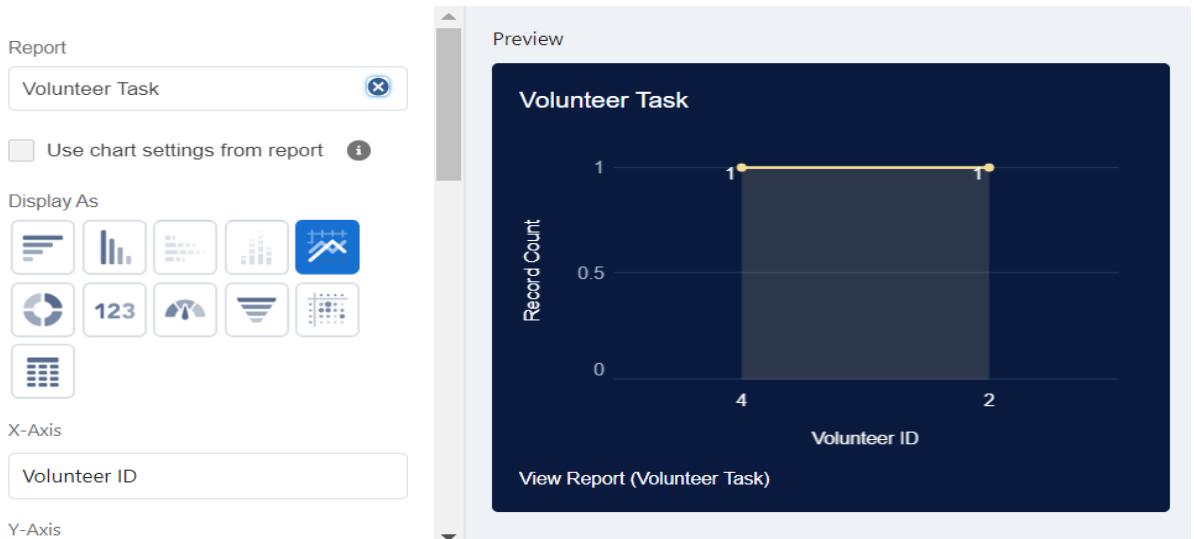
| Venue Name ↑                  | Drop-Off point Name | Distance |
|-------------------------------|---------------------|----------|
| La Royale Banquet Hall.       | Shapur              | 5.1161   |
| La Royale Banquet Hall.       | Jeeditmetla         | 6.9030k  |
| Paradise Garden Function Hall | Suraram Village     | 28.2332  |
| Ujwala Grand                  | -                   | -        |

At the bottom of the preview, there is a link 'View Report (venue and Drop Off point)'.

1. Now click on save.

## 13.2 Adding Volunteer Task Report to The Dashboard

1. Click on Widget and select Chart or Table
2. In Select Report : Select Volunteer Task Report.
3. Then click on select
4. In Add Component:  
Display As : Select Line Chart  
Component Theme : Select Dark (Optional)



1. Now click on save.

## 14. Sharing Rules

### 14.1 Creation Of Sharing Rules

1. Go to setup >> type Sharing Settings in quick find box >> Click on the Sharing Settings.
2. Scroll down and find Drop-Off point Sharing Rules.
3. Click on new near Drop-Off point Sharing Rules and Name it as:

Label : Rule 1

Rule Name : Rule\_1

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

0. Select which records to be shared:

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

0. Select the users to share with : Near Share With  
Public Groups : Iksha
0. Click on Save.
0. Click on new near Drop-Off point Sharing Rules and Name it as:  
Label : Rule 2  
Rule Name : Rule\_2
0. Select your rule type : Select Based on criteria.
0. Select which records to be shared:  
Field : Operator : Value = Distance : greater than : 15  
Field : Operator : Value = Distance : less or equal : 30
0. Select the users to share with : Near Share With  
Public Groups : NSS
0. Click on Save.
0. Click on new near Drop-Off point Sharing Rules and Name it as:  
Label : Rule 3  
Rule Name : Rule\_3
0. Select your rule type : Select Based on criteria.
0. Select which records to be shared:  
Field : Operator : Value = Distance : greater than : 30  
Field : Operator : Value = Distance : less or equal : 50
0. Select the users to share with : Near Share With  
Public Groups : Street Cause
0. Click on Save.

| No sharing rules specified.  |  |                                     |              |
|------------------------------|--|-------------------------------------|--------------|
| Drop-Off Point Sharing Rules |  | New                                 | Recalculate  |
| Action                       | Criteria   | Drop-Off Point Sharing Rules Help ? |              |
| Edit   Del                   | (Drop-Off Point: Distance GREATER THAN 30) AND (Drop-Off Point: Distance LESS OR EQUAL 50) | Shared With                         | Access Level |
| Edit   Del                   | (Drop-Off Point: Distance GREATER THAN 15) AND (Drop-Off Point: Distance LESS OR EQUAL 30) | Group: bhuvan                       | ReadWrite    |
| Edit   Del                   | Drop-Off Point: Distance LESS THAN 15  | Group: hanish                       | ReadWrite    |
|                              |  | Group: iksha                        | ReadWrite    |

## 15.Home Page

### 15.1 Creation of Home Page

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

The screenshot shows a dashboard titled "Task Execution Details". On the left, there's a section titled "venue and Drop Off point" with a table listing venues like La Royale Banquet Hall, Jeedimetla, Paradise Garden Function Hall, and Ujwala Grand along with their respective drop-off points and distances. Below this is a "View Report (venue and Drop Off point)" button. To the right is a "Volunteer Task" section featuring a bar chart with "Record Count" on the y-axis (0, 0.5, 1) and "Volunteer ID" on the x-axis (4, 2). A photo of hands handing out food in white bowls is displayed next to the chart. Below the chart is a "View Report (Volunteer Task)" button. At the top right, there are "Open", "Refresh", and "Subscribe" buttons. To the right of the main content area is a placeholder for a "Flow Component: Venue Form" with the note "This is a placeholder. Flows don't run in the canvas." Below the main content are two empty boxes with "Add Component(s) Here" buttons.

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

This screenshot shows the FoodConnect home page. The top navigation bar includes links for Home, Venues, Tasks, Drop-Off points, Execution Details, Volunteers, Reports, and Dashboards. The main content area is identical to the previous screenshot, displaying the "Task Execution Details" dashboard with the "venue and Drop Off point" table, the "Volunteer Task" chart, and the "Venue Form" placeholder. The "Add Component(s) Here" buttons are also present at the bottom.

**After Doing all the Work My Final home page looks like this**

The screenshot shows the FoodConnect application interface. At the top, there is a navigation bar with links: Home, Venues, Drop-Off Points, Tasks, Volunteers, Execution Details, Reports, and Dashboards. Below the navigation bar, there is a dashboard titled "Task Execution Details" with two cards: "venue and Drop Off point" and "Volunteer Task". Both cards display the message "We can't draw this chart because there is no data." and have a "View Report" button. To the right of these cards is a decorative image of various fruits and vegetables. On the far right, there is a "Venue Form" section with fields for Venue Name, Email, Phone, Venue Location, Latitude, and Longitude, along with a "Next" button.

## 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.