Project Report on
Cosmetics Store Management
Project Group Name : CosmeticsStoreManagement17GP

1.Creating Developer Account

Creating a developer org in salesforce.

1. Go to developers.salesforce.com/
2. Click on sign up.
3. On the sign up form, enter the following details :

    i. First name & Last name

    ii. Email

    iii. Role : Developer

    iv. Company : College Name

    v. County : India

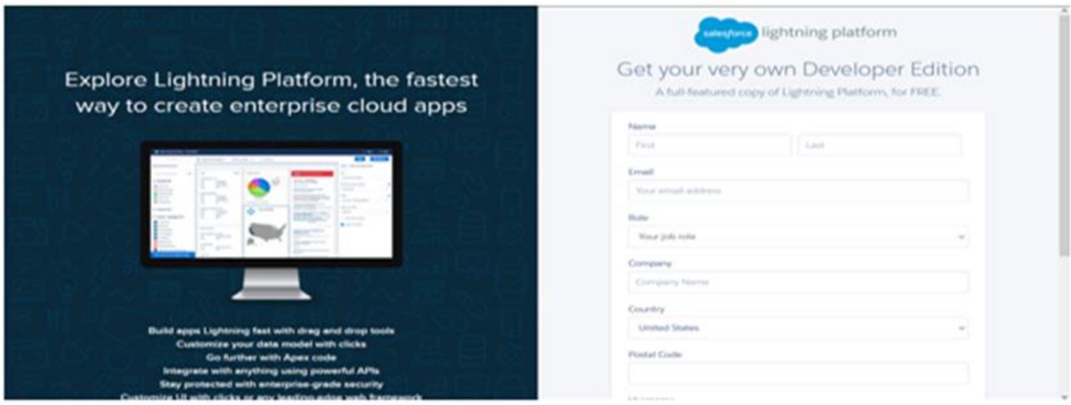
    vi. Postal Code : pin code

    vii. Username : should be a combination of your name and company

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

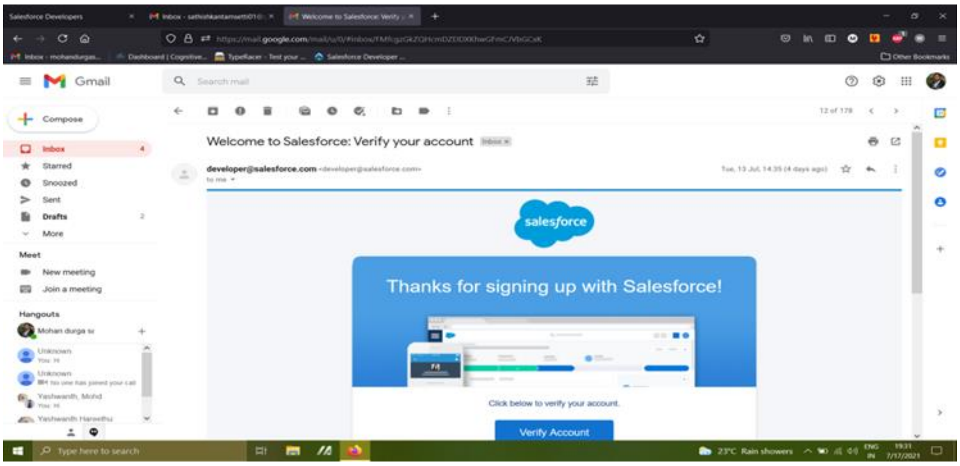
    username@organization.com

Click on sign up after filling these.



Account Activation

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

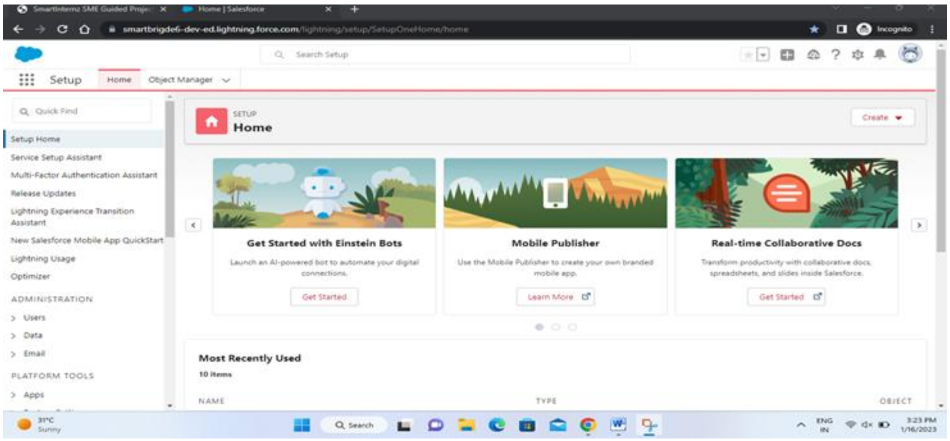


Login To Your Salesforce Account

1.Go to salesforce.com and click on login.

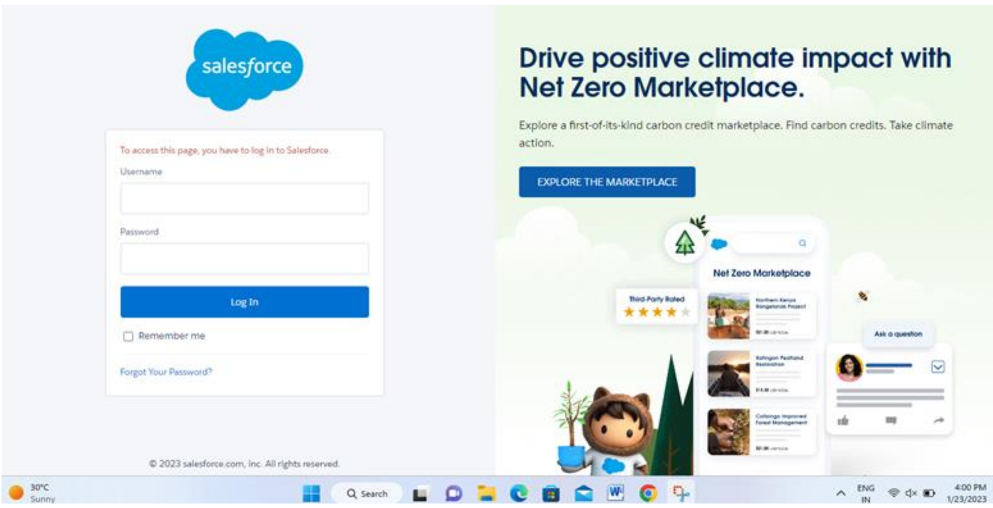
2.Enter the username and password that you just created.

3.After login this is the home page which you will see.



Salesforce Login

htttps://login.salesforce.com



2.To Create An Object

Creation of Objects for Urban Color, For this Urban Color we need to create 3 objects

i.e .,Our Customers,Consultants,Retailers,others.

The below steps will assist you in creating those objects.

1. Click on the gear icon and then select Setup.

2. Click on the object manager tab just beside the home tab.

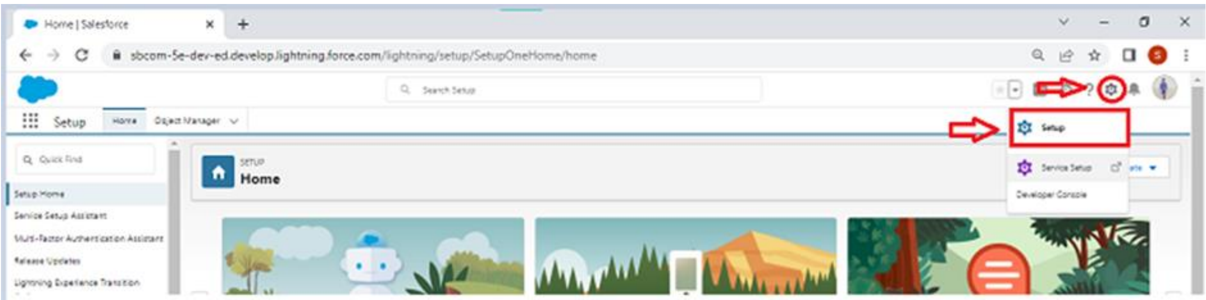
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

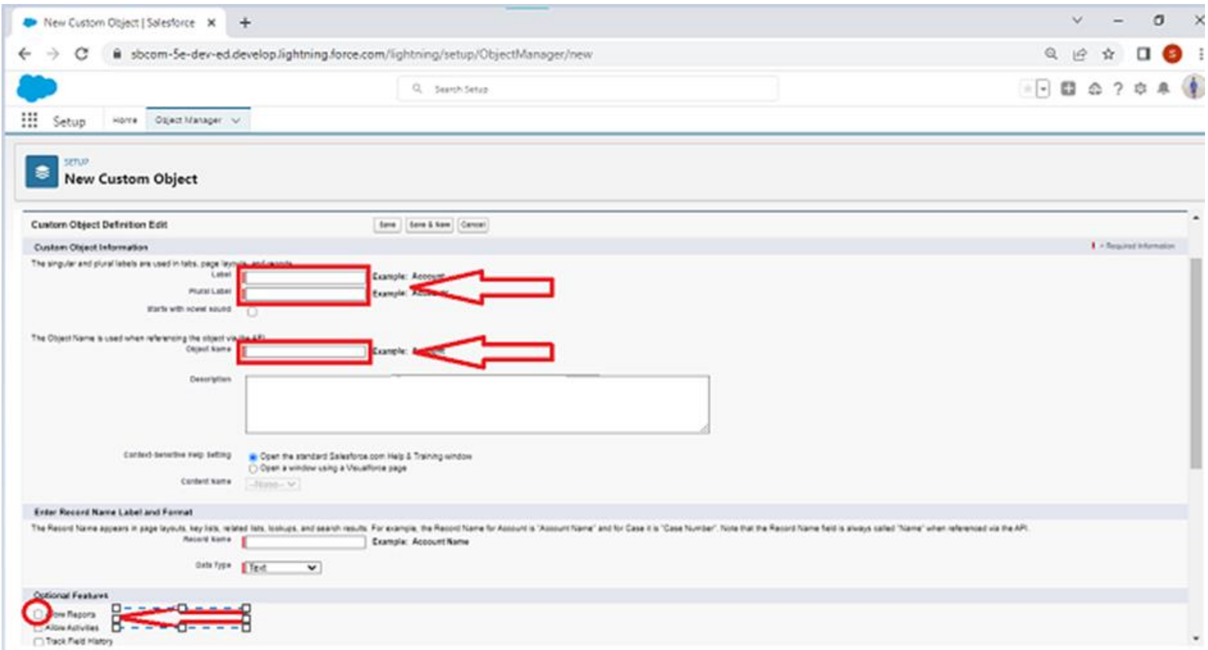
Creation of Our Customer Object.

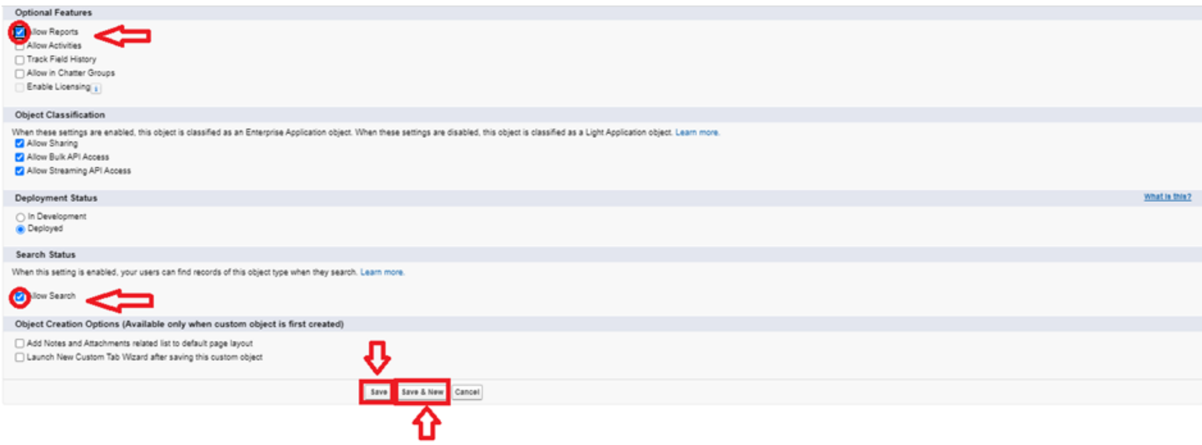
1. On the Custom Object Definition page, create the object as follows:
2. Label: Our Customer
3. Plural Label: Our Customers
4. Record Name: Our Customer
5. Check the Allow Reports checkbox
6. Check the Allow Search checkbox
7. Click Save.

Creation of Tab

1. Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
2. Under Custom Object Tabs, click New.
3. For Object, select Our Customer.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save.







2.1 Create The Consultants Object

To create the Consultants object continue the same steps which is followed for the above object

2.2 Create The Retailers Object

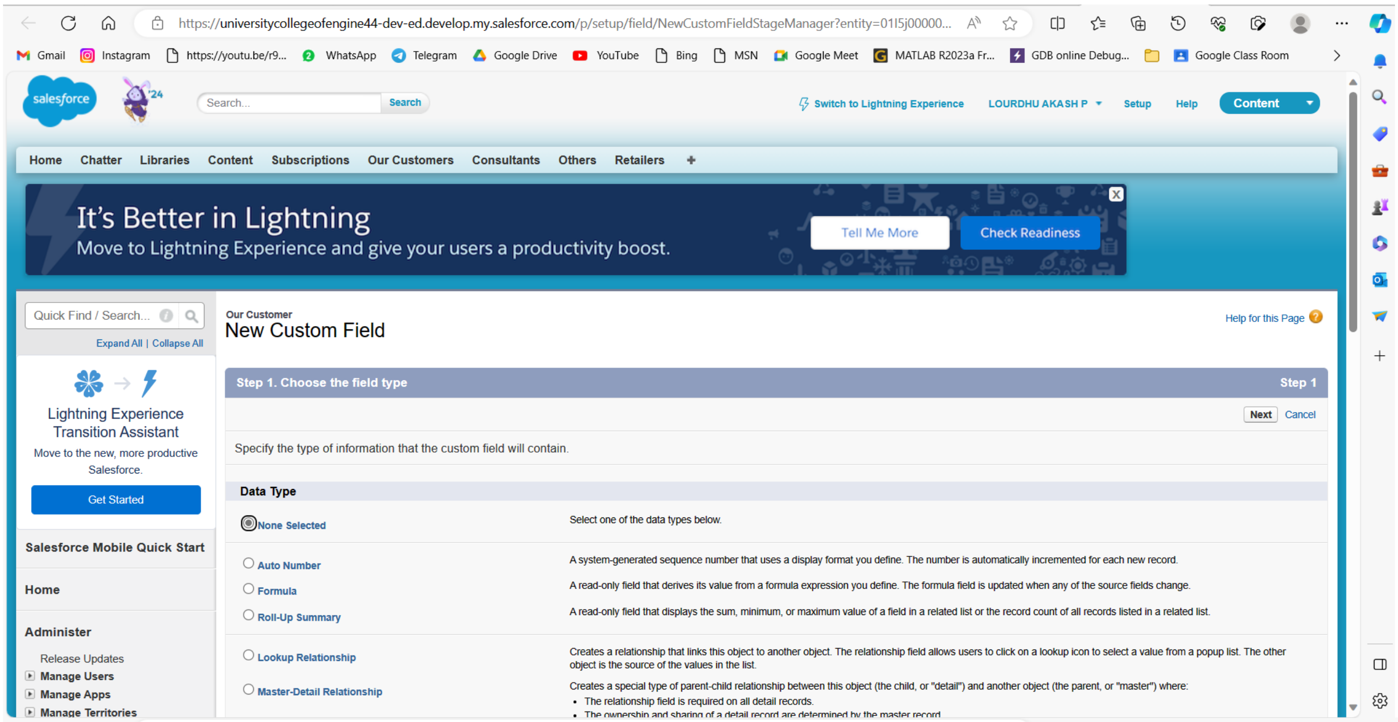
To create the Retailers object continue the same steps which are followed for the above object

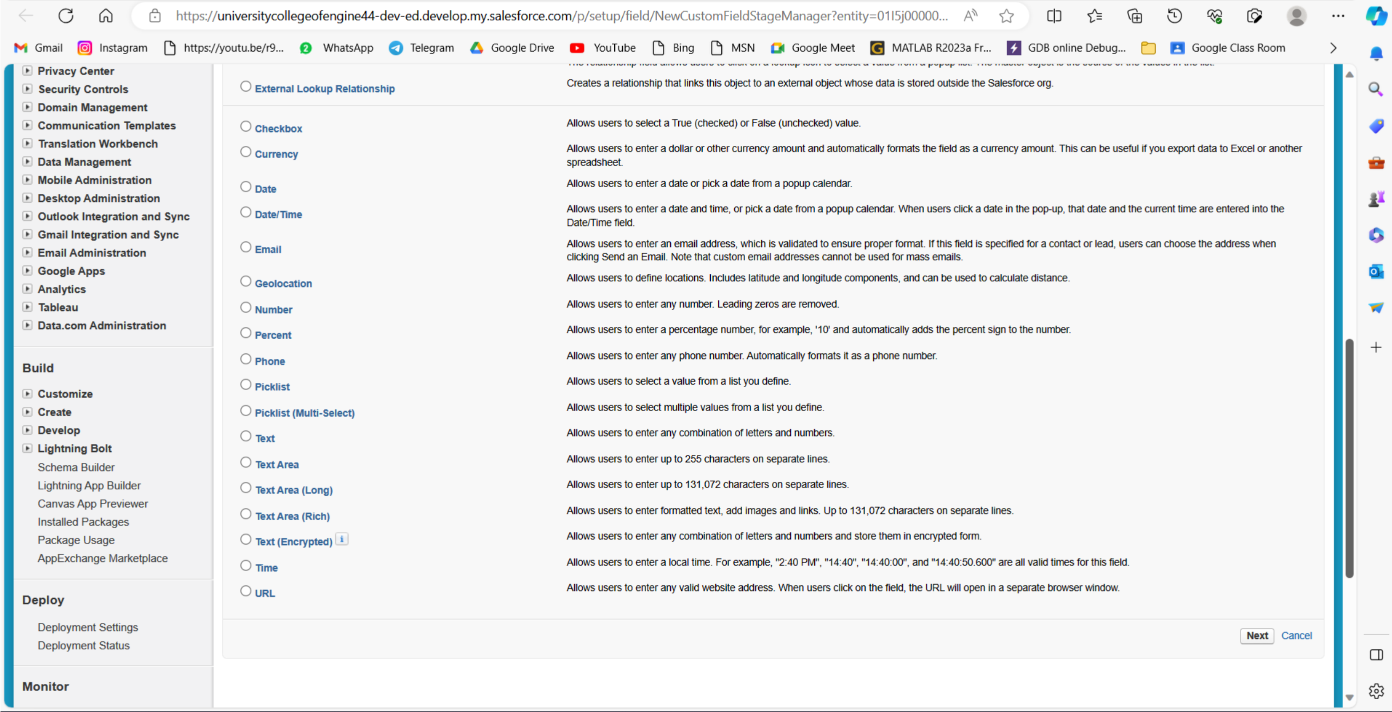
2.3 Create The Others Object

To create the Others object continue the same steps which are followed for the above object.

3 Fields In Our Customers Objects

S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Address	Text Area
6	Additional Information	Text Area


https://universitycollegeofengine44-dev-ed.develop.my.salesforce.com/p/setup/field/NewCustomFieldStageManager?entity=01I5j00000...
Gmail Instagram https://youtu.be/r9... WhatsApp Telegram Google Drive YouTube Bing MSN Google Meet MATLAB R2023a Fr... GDB online Debug... Google Class Room
salesforce
Search
Switch to Lightning Experience
LOURDHU AKASH P
Setup
Help
Content
Home Chatter Libraries Content Subscriptions Our Customers Consultants Others Retailers
It's Better in Lightning
Move to Lightning Experience and give your users a productivity boost.
Tell Me More
Check Readiness
Quick Find / Search...
Expand All | Collapse All
Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
Get Started
Salesforce Mobile Quick Start
Home
Administer
Release Updates
Manage Users
Manage Apps
Manage Territories
Our Customer
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
The relationship field is required on all detail records.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Gmail Instagram https://youtu.be/r9... WhatsApp Telegram Google Drive YouTube Bing MSN Google Meet MATLAB R2023a Fr... GDB online Debug... Google Class Room
Privacy Center
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Mobile Administration
Desktop Administration
Outlook Integration and Sync
Gmail Integration and Sync
Email Administration
Google Apps
Analytics
Tableau
Data.com Administration
Build
Customize
Create
Develop
Lightning Bolt
Schema Builder
Lightning App Builder
Canvas App Previewer
Installed Packages
Package Usage
AppExchange Marketplace
Deploy
Deployment Settings
Deployment Status
Monitor
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date
Allows users to enter a date or pick a date from a popup calendar.
Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number
Allows users to enter any number. Leading zeros are removed.
Percent
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone
Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist
Allows users to select a value from a list you define.
Picklist (Multi-Select)
Allows users to select multiple values from a list you define.
Text
Allows users to enter any combination of letters and numbers.
Text Area
Allows users to enter up to 255 characters on separate lines.
Text Area (Long)
Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted)
Allows users to enter any combination of letters and numbers and store them in encrypted form.
Time
Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.
URL
Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.
Next Cancel

3.1 Fields In Consultants Objects

S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Delivery Type 1)Self Pickup 2)Courier	Picklist
6	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash	Picklist
8	Customer details	Lookup(Our Customers Object)
9	Address	Text Long

Enter the above details similarly as done above

3.2 Fields In Retailers Objects

S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Delivery Type 1)Self Pickup 2)Courier	Picklist
6	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash	Picklist
8	Customer Details	Master-Detail Relationship (Our Customers Object)

3.3 Fields In Others Objects

S No	Field Label	Data Type
1	Name	Text
2	Employee 1)Company Employee 2)Staff 3)Special Reference	Picklist
3	Coupon	Text
4	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist

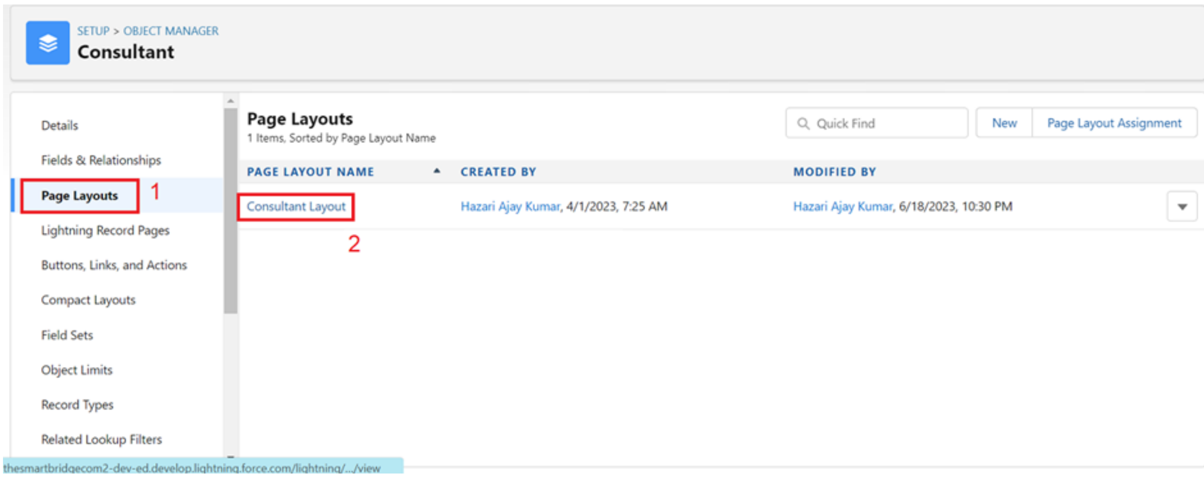
Enter the above details similarly as done above

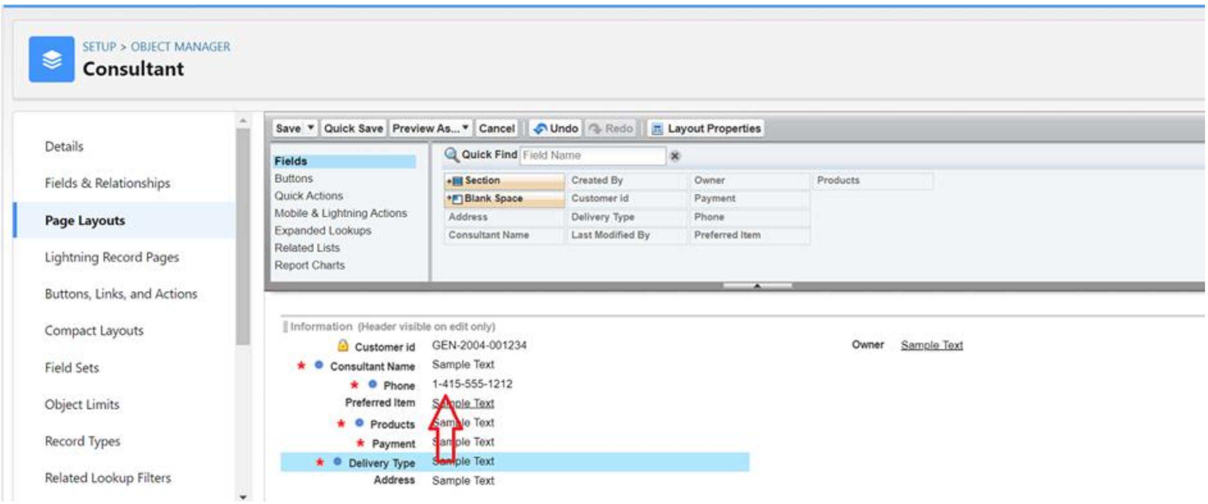
4. Page Layouts

1.From the Salesforce setup menu, go to "Object Manager" and select the Consultants object.

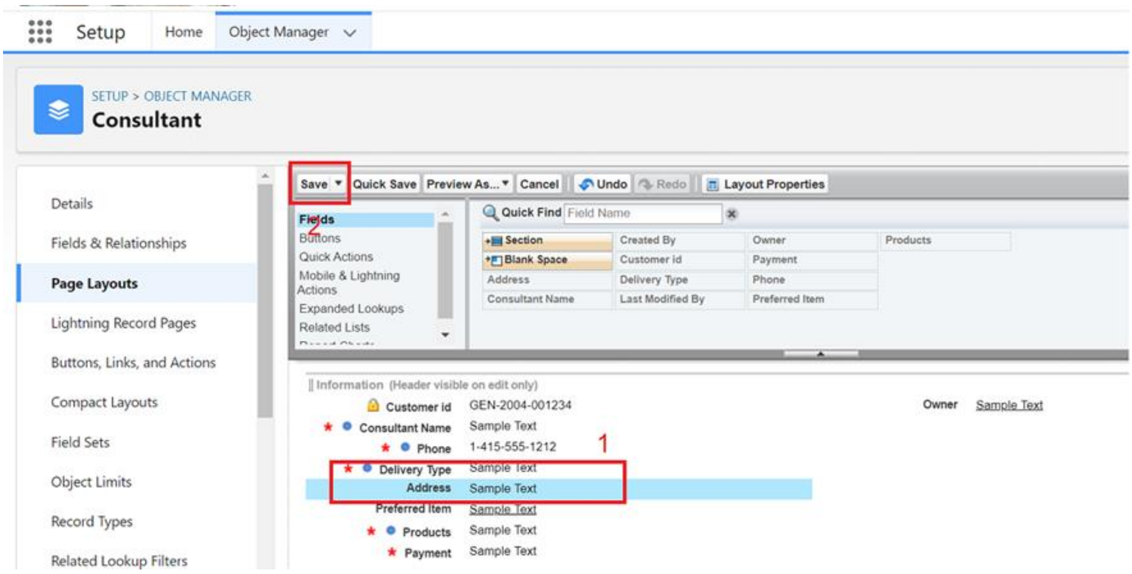
2.Click on "Page Layouts" in the left sidebar. This will display a list of available page layouts for the selected object.

3.Select the Consultant Layout page layout .





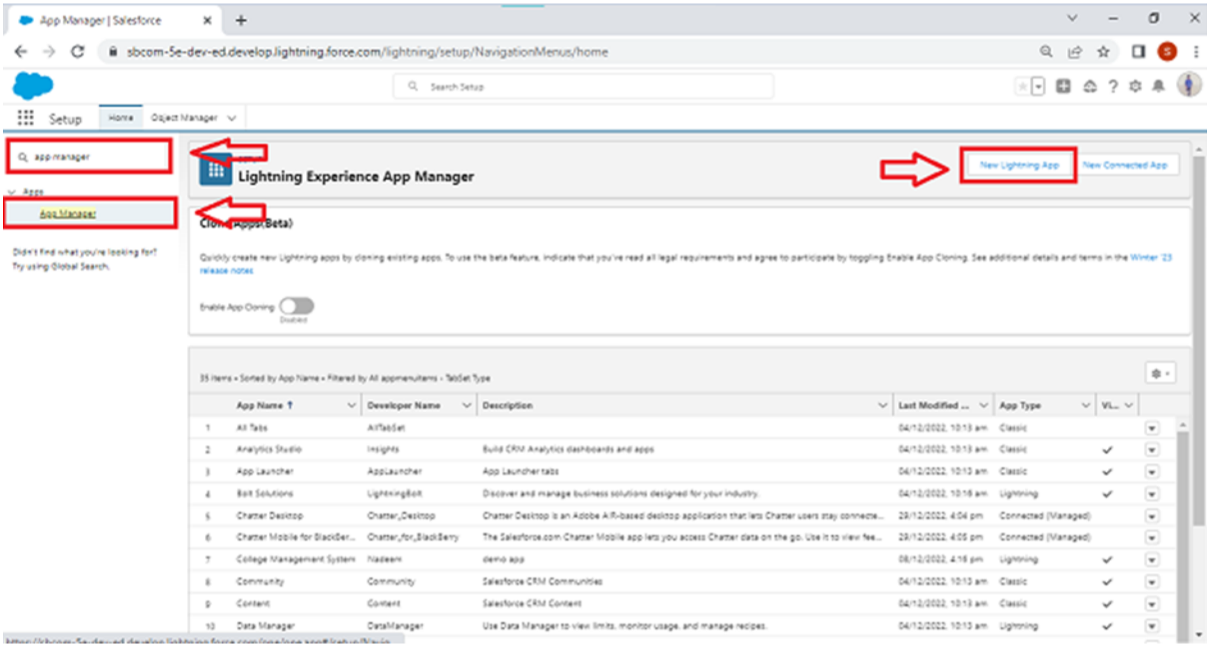
5.Click on Save



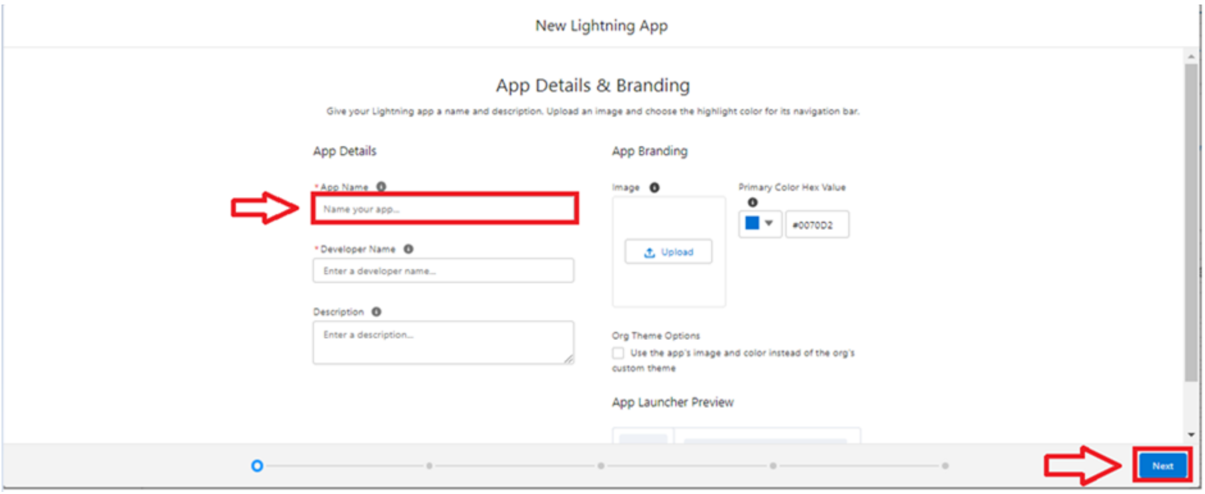
5. Create A Lightning App

To create a lightning app page:

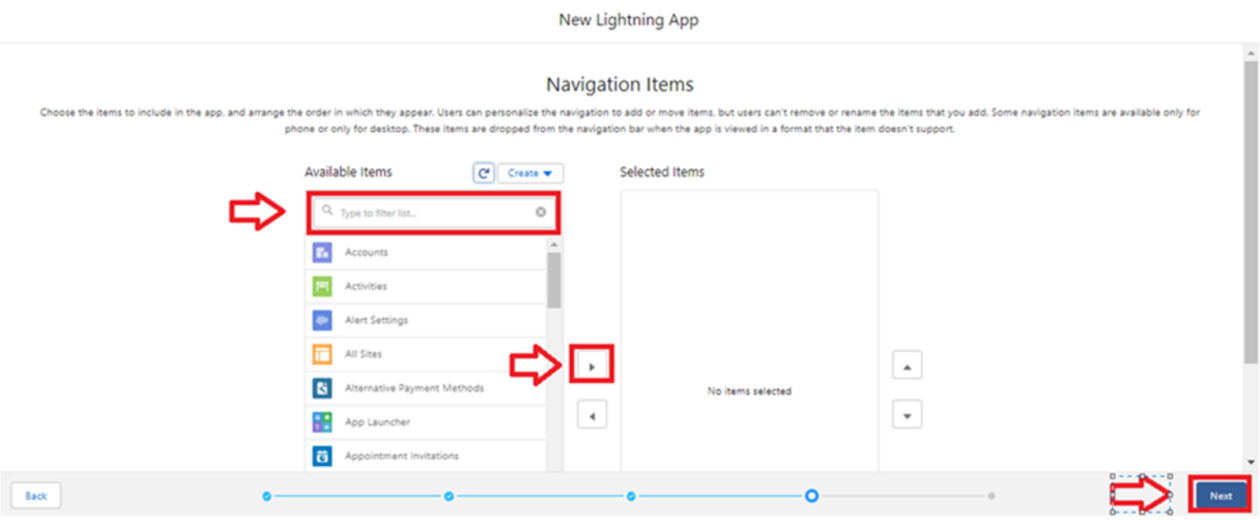
1.Go to setup page >>> search “app manager” in quick find >>> select “app manager” >>> click on New lightning App.



2.Fill the app name as Urban Color in app details and branding >>>Next >>> (App option page) keep it



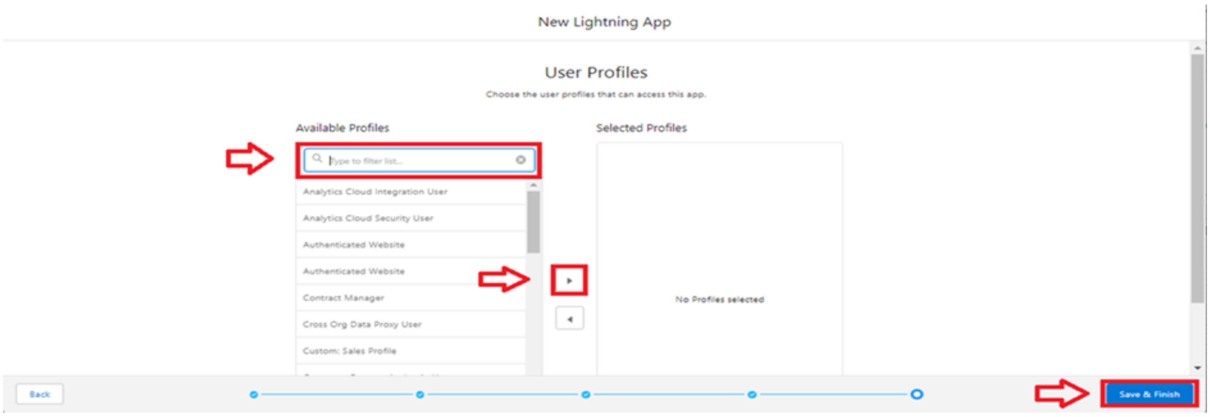
3.To Add Navigation Items:



Select
the items
(Our

Customers,Consultants,Retailers,Others,Reports,Dashboards) from the search bar and move it using the arrow button >>> Next.

4.To Add User Profiles:



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

6. Creating A Profiles

Creating a Profiles:Now create a Store Supervisor profile and set its object permissions.

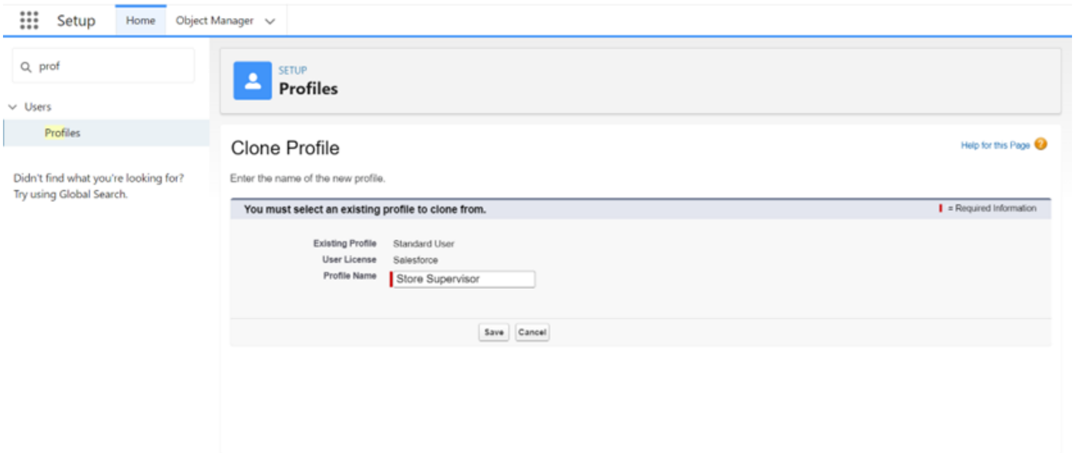
Creating a Profiles:

Now create a Store Supervisor profile and set its object permissions.

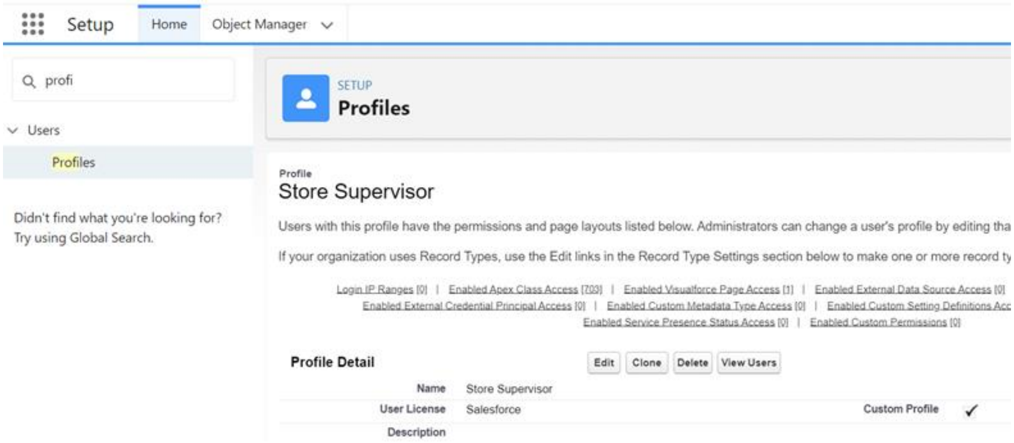
1. From Setup enter Profiles in the Quick Find box, and select Profiles.
2. From the list of profiles, find Standard User.
3. Click Clone.
4. For Profile Name, enter Store Supervisor.
5. Click Save.
6. While still on the Store Supervisor profile page, then click Edit.
7. Scroll down to Custom Object Permissions and give access for Create,Read,Edit,Delete,View all and modify all for Our Customers,Consultants,Retailers,Others.
8. Scroll down to Custom App Settings and give access for Urban Color.

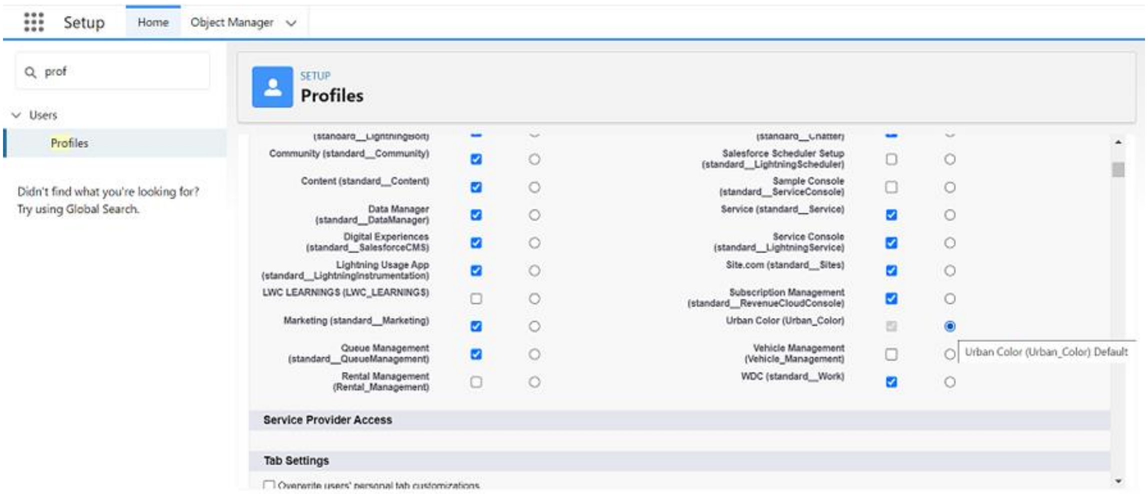
To create a new profile:

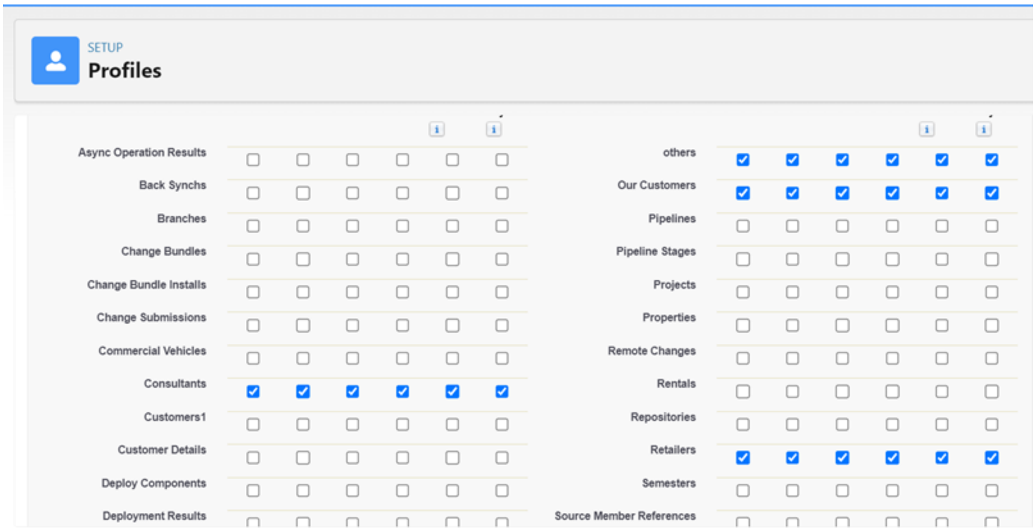
Go to setup >>> type profiles in quick find box >>> click on profiles >>> clone the desired profile (standard user is preferable) >>> enter profile name >>>save

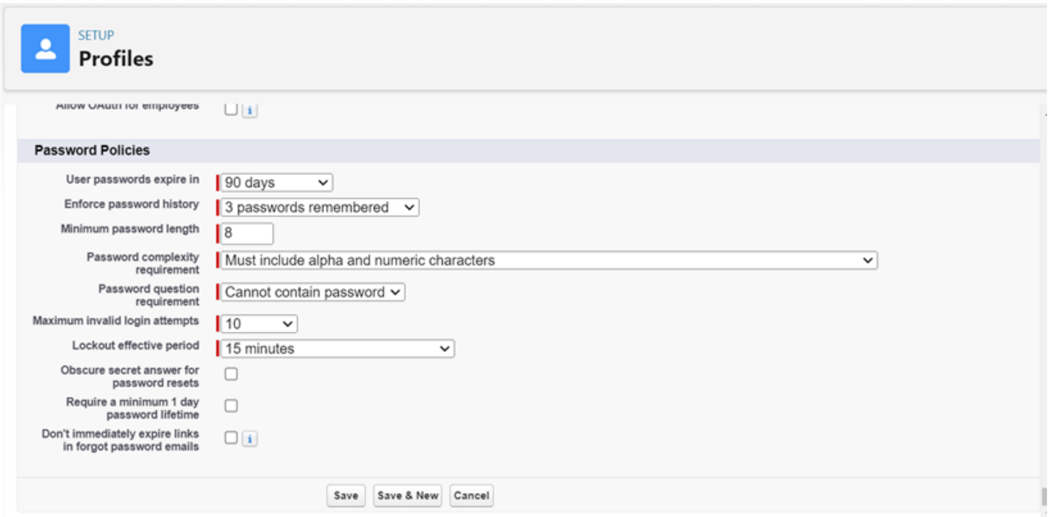


While still on the profile page, then click Edit.



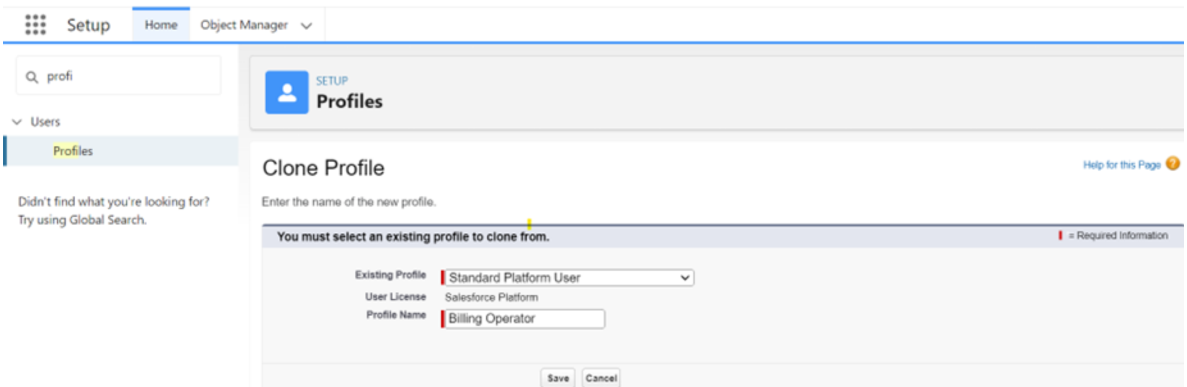


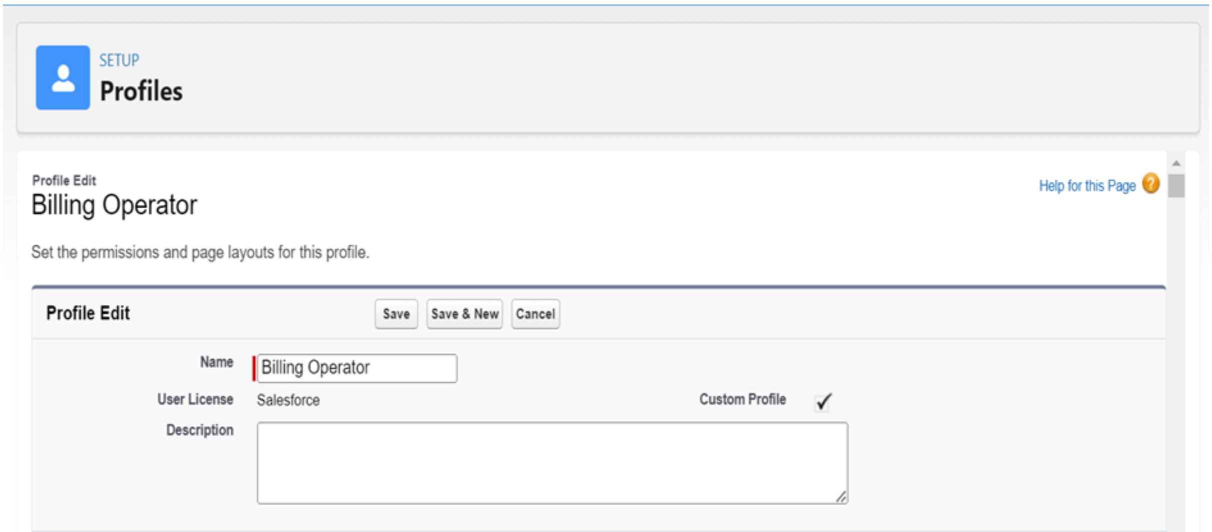


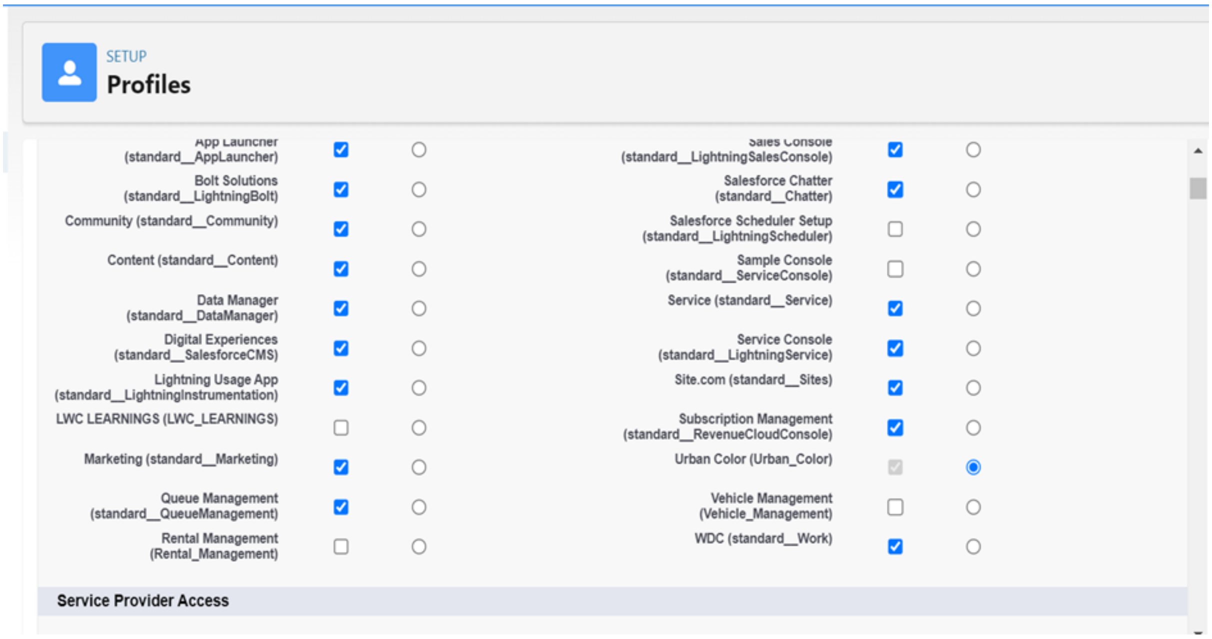


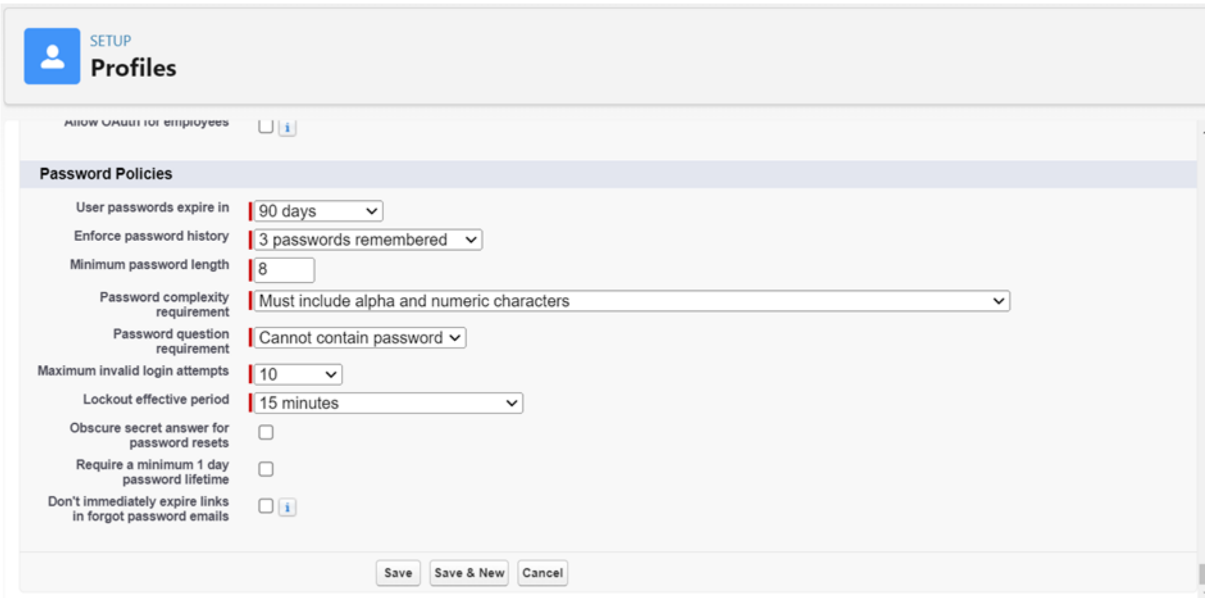
Click on Save.

Similarly Create operator profile ,Clone Salesforce Platform user and give access only for Billing Operator.









Click on Save.

7. Creating A Role

Creating a Role:

1. Click on the Gear Icon

2. Click "Setup"

3. In the Quick Find box, enter "Roles"

4. Click "Roles"

5. Click on "Set Up Roles"

6. Click "Expand All"

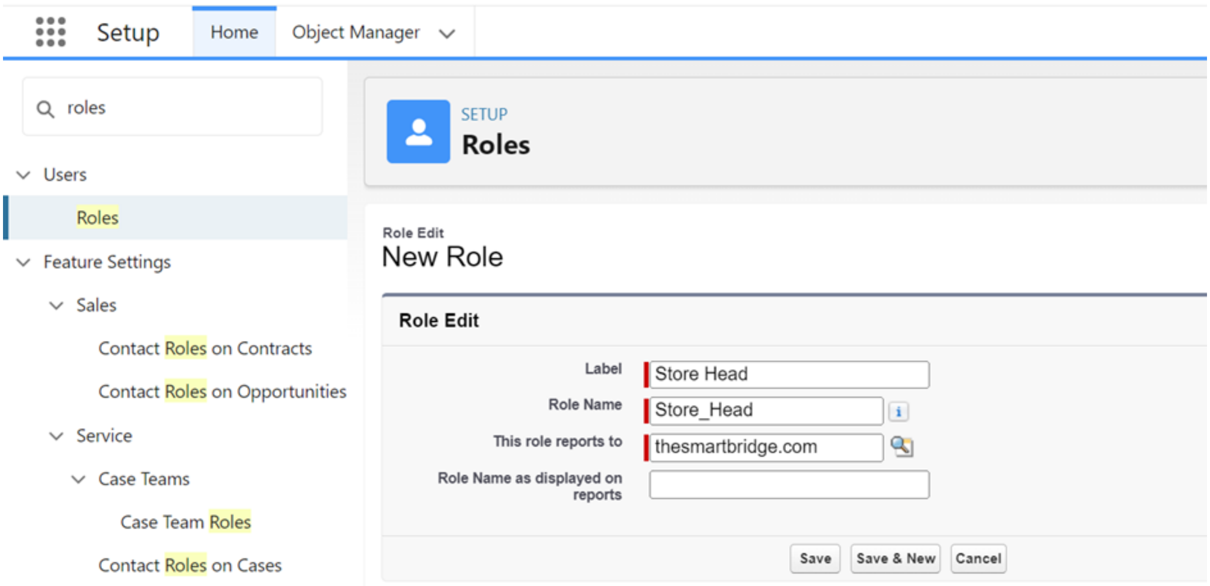
7. Under the CEO, click on "Add Role"

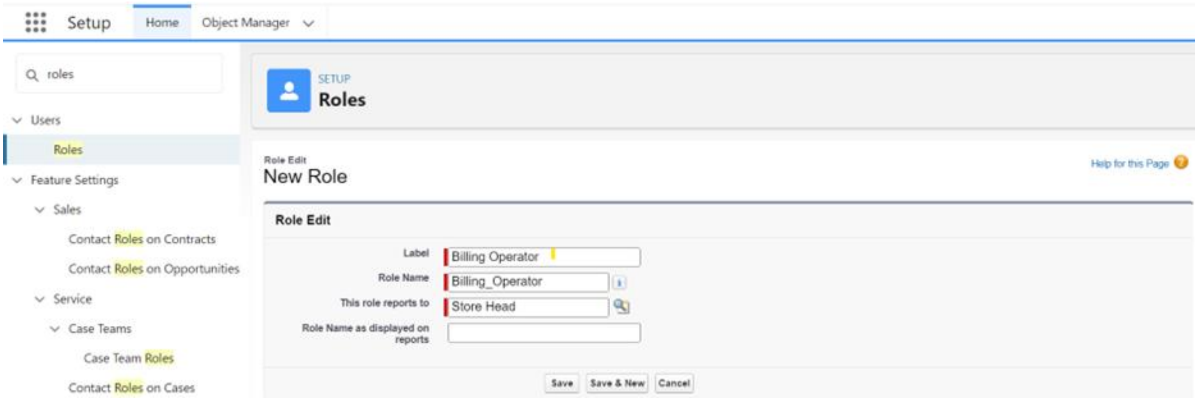
8. Fill up the Label as Store Head, Role Name Store_Head.

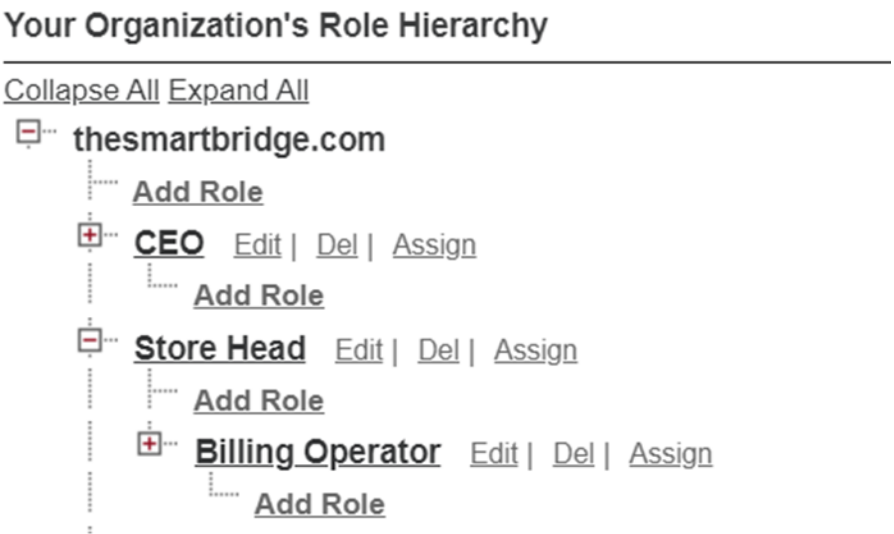
9. Enter a Role name that will be displayed on Reports

10. Click on Save .

Similarly create One Roles under Store Head as Billing Operator.



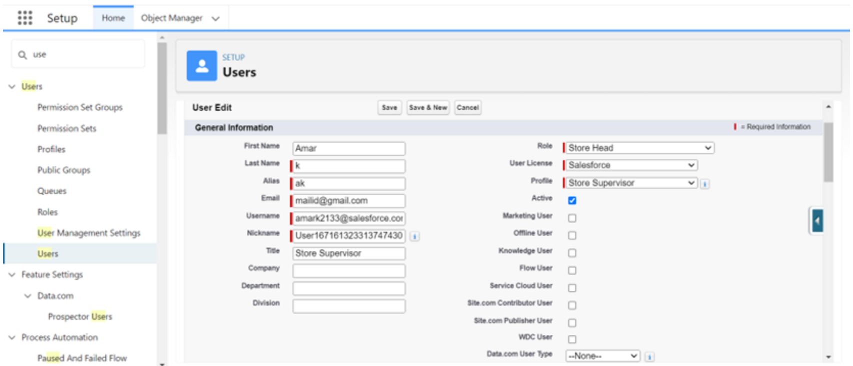


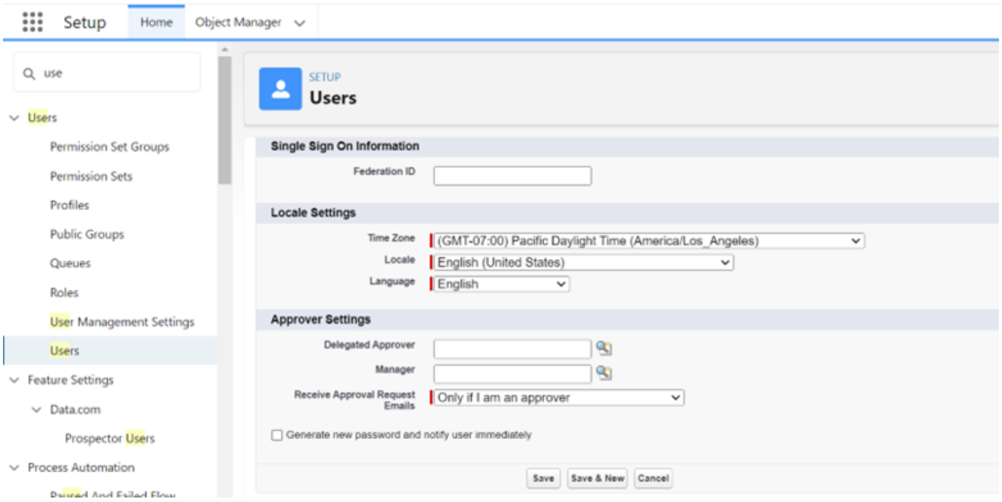


8.Creating A Users

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the user’s name Amar K and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a Role(Store Head)
5. Select a User Licence As Salesforce.
6. Select a profile as Store Supervisor.
7. Check Generate new password and notify the user immediately to have the user’s login name and a temporary password emailed to your email.

Fill in the fields (first name, last name, alias, email id, username, nick name, role, user licence, profiles) ? save.

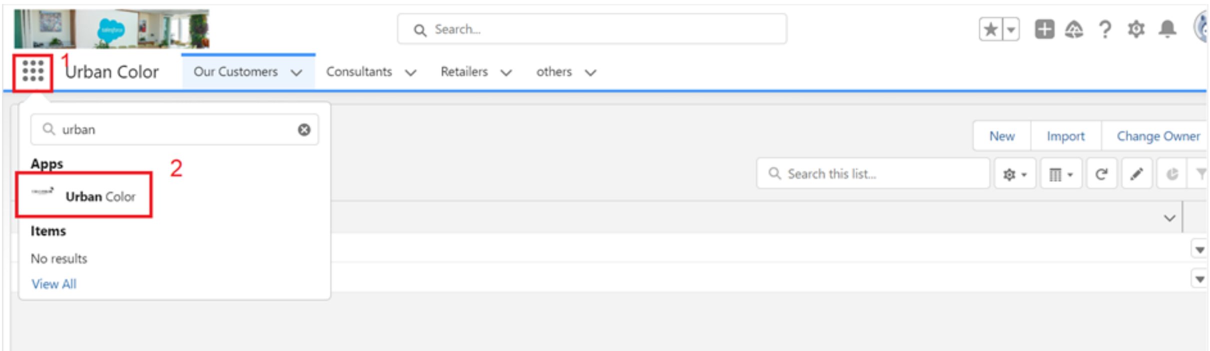


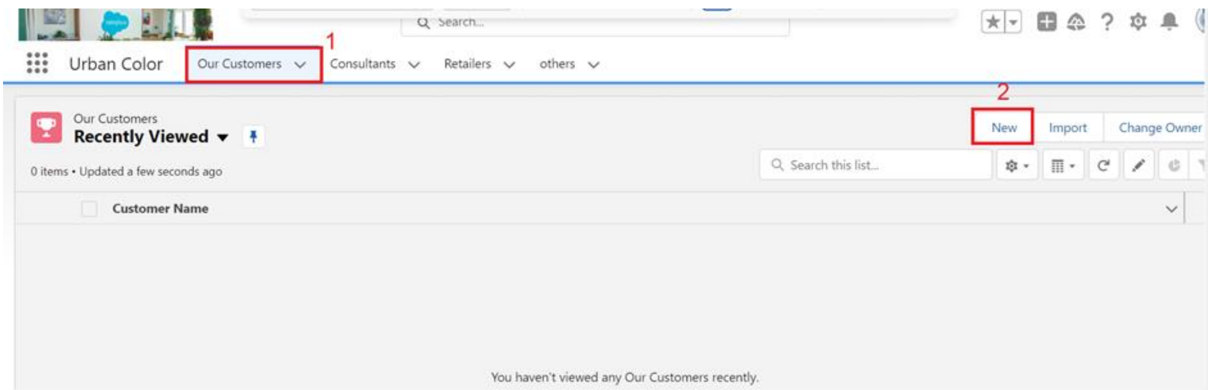


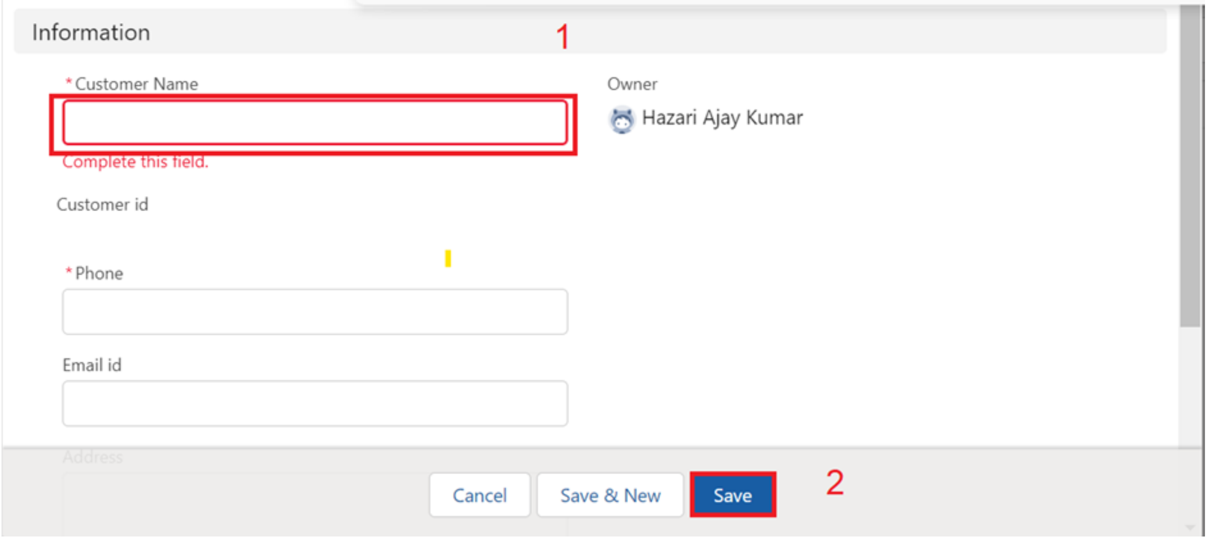
9.Create Our Customer Record

Create Our Customer Record

1. Click on App Launcher on left side of screen.
2. Search Urban Color & click on it.
3. Click on Our Customer tab.
4. Click new button
5. Fill all Our Customer record details.
6. Click on Save Button

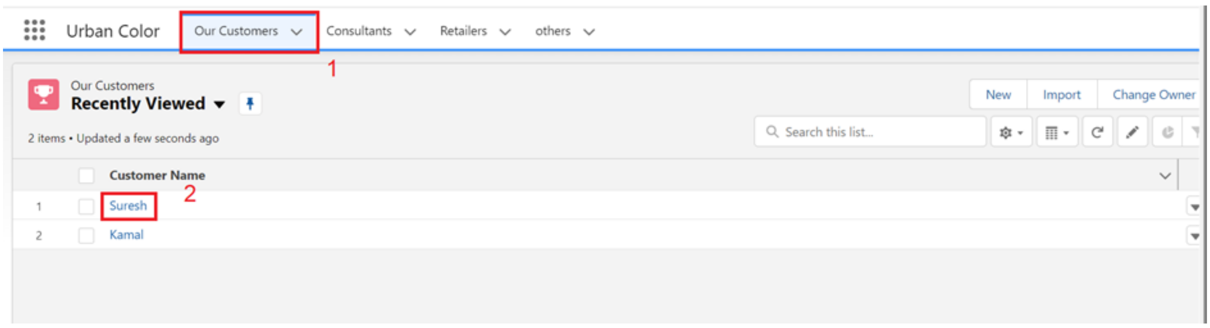


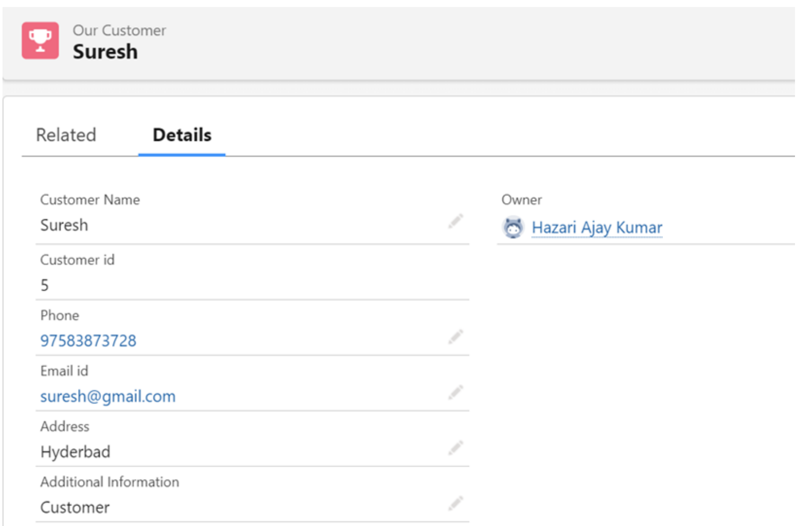




9.2 View Record (Our Customer)

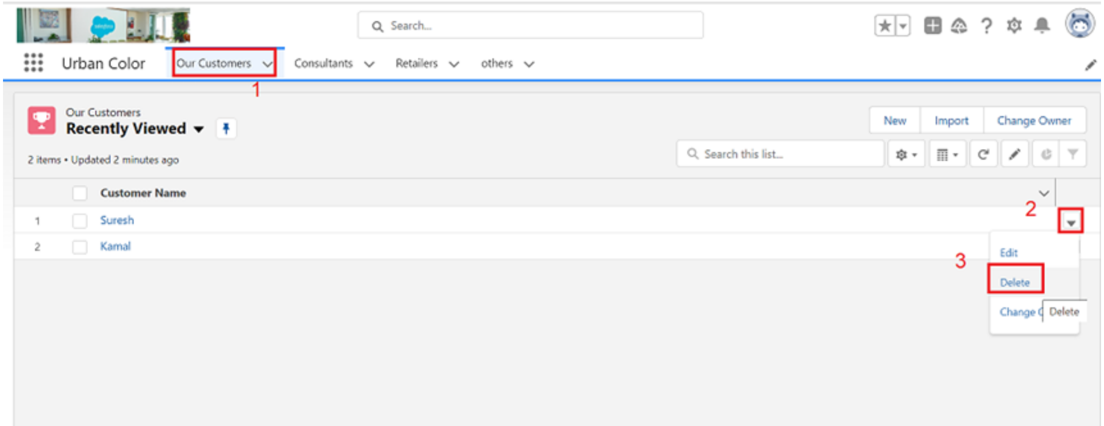
1. Click on App Launcher on the left side of the screen.
2. Search Urban Color & click on it.
3. Click on Our Customer Tab.
4. Click on any record name. you can see the details of the Our Customer

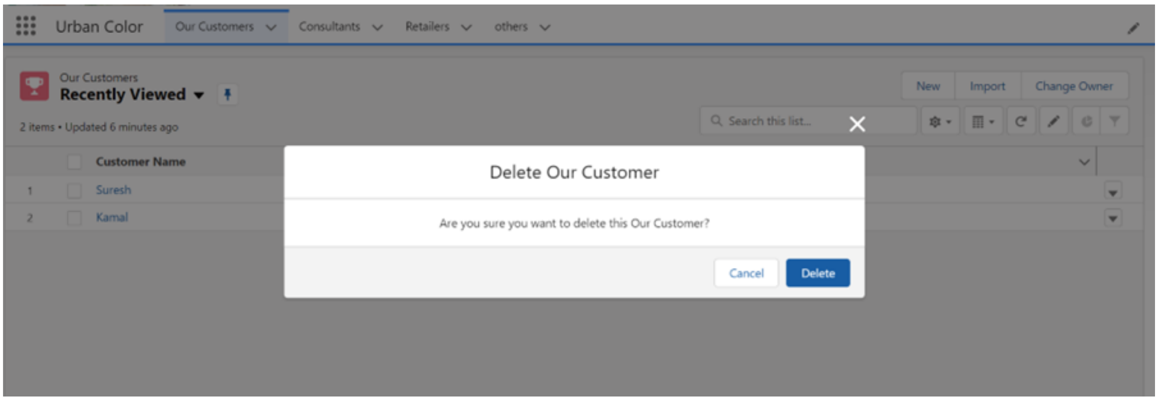




9.3 Delete Record (Our Customer)

1. Click on App Launcher on the left side of the screen.
2. Search Urban Color & click on it.
3. Click on Our Customer Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.

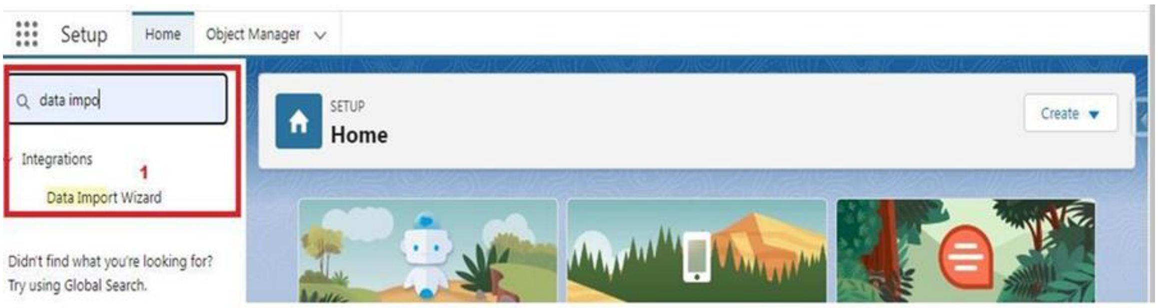




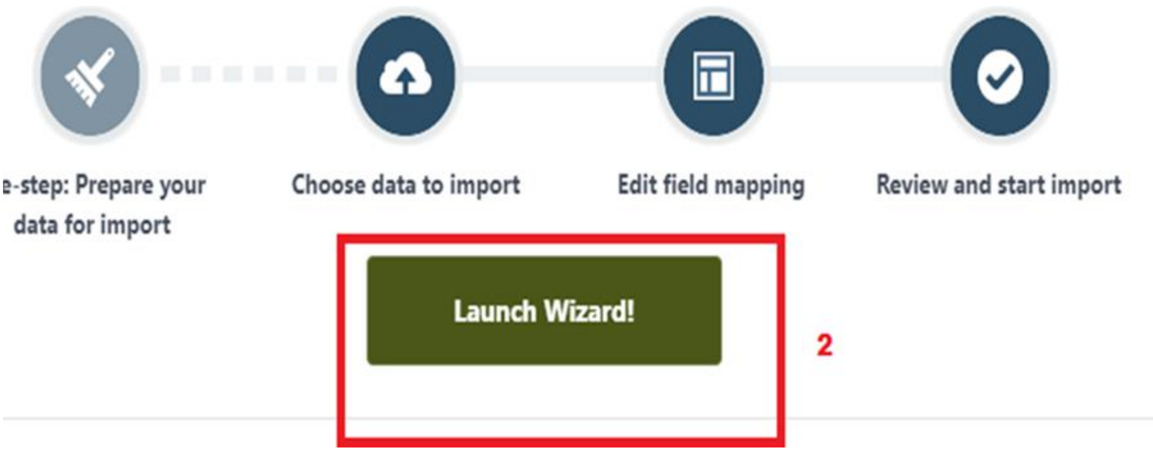
10 .Data Import Wizard

1. From Setup, click the Home tab.

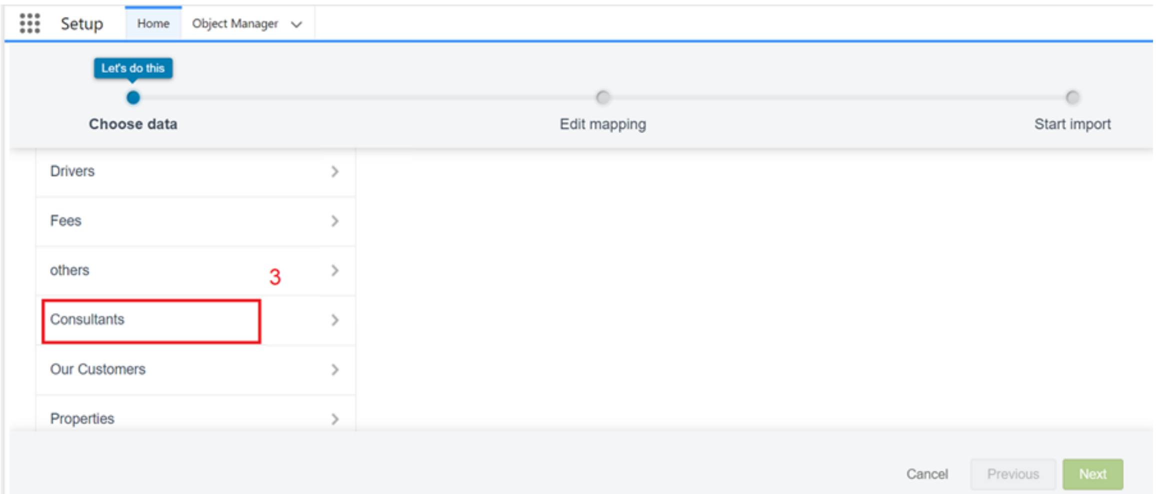
2. In the Quick Find box, enter Data Import and select Data Import Wizard.



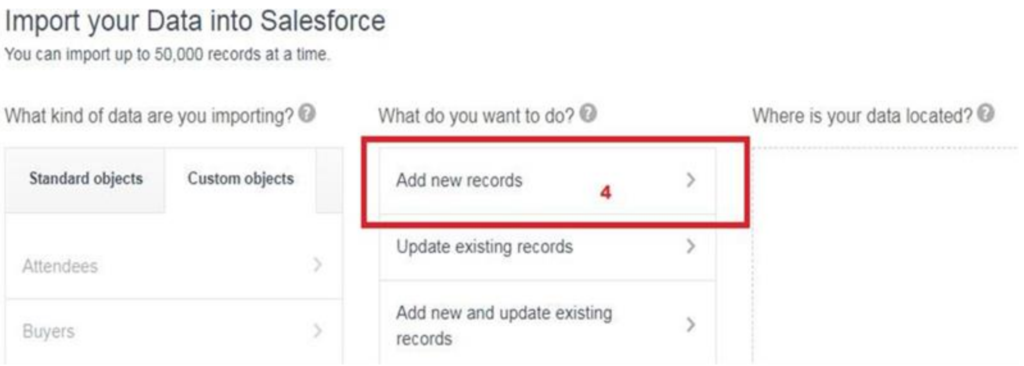
3.Click Launch Wizard!



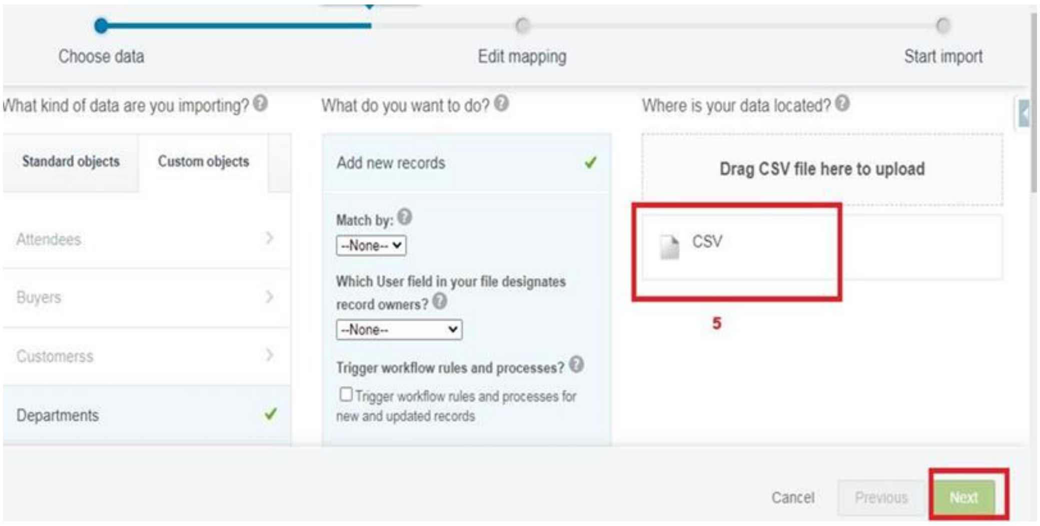
4.Click the Custom Objects tab and select the Consultant object



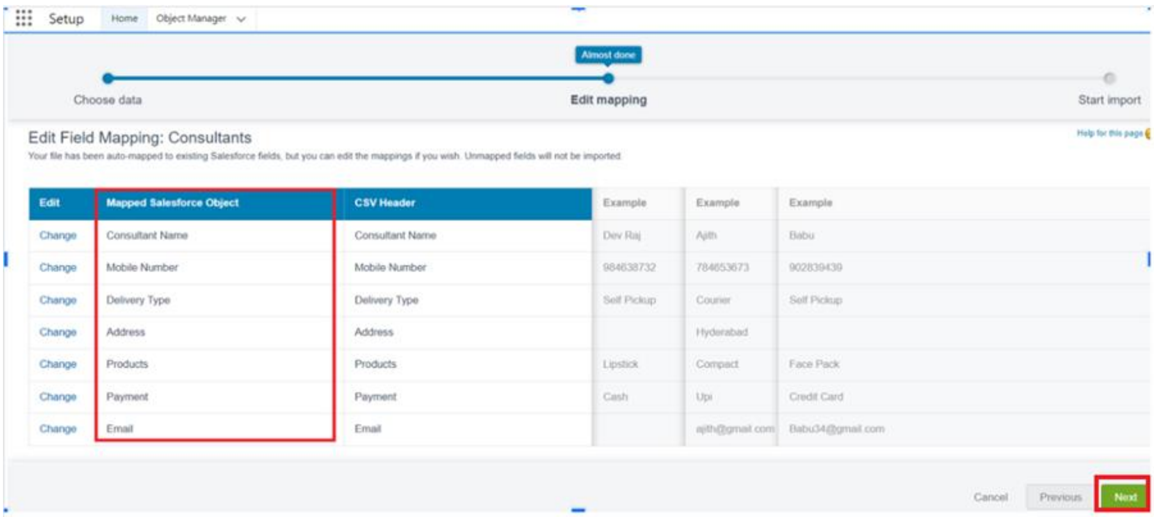
5.Select Add new records.



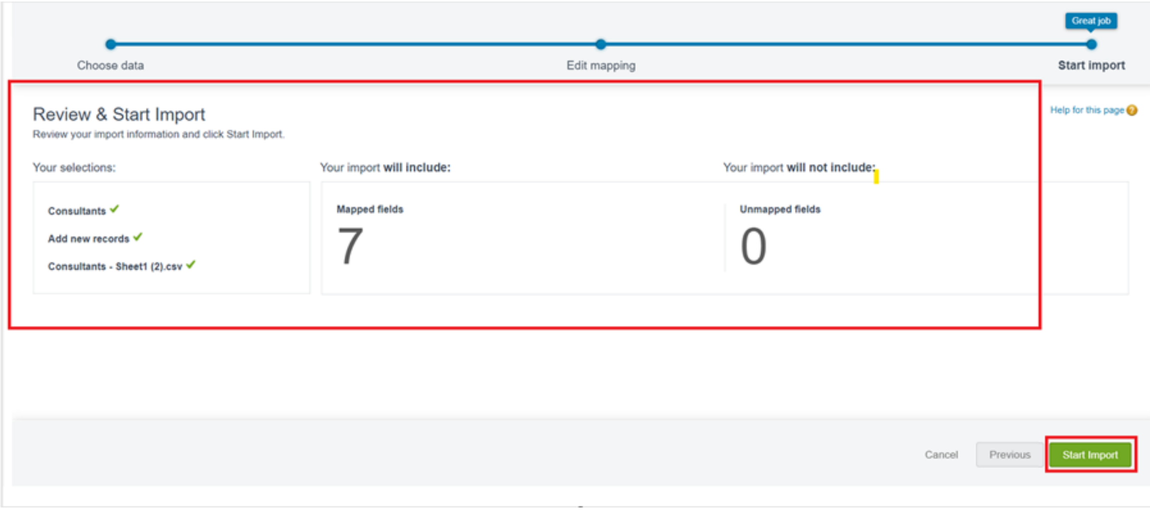
6.Click CSV and choose file Consultant_CSV which we made earlier. Click Next.



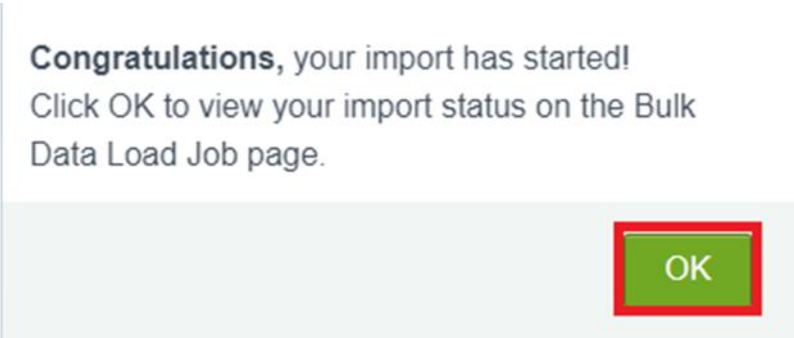
7.Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.



8.The next screen gives you a summary of your data import. Click Start Import.



9.Click OK on the popup.



10.Scroll down the page and verify that your data has been imported under batches.

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	7512w00000Xqrar	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	103	52	0	9	0	0		Completed

11.Make sure you have 0 records under the records failed column.

Note- Do Field mapping carefully.

11.1 Create Report

1.Click App Launcher

2.Select Urban Color App

3.Click reports tab

4.Click New Report.

5.Click the report type as Consultants Click Start report.

6.Customize your report, in Columns select - ConsultantName,Delivery type,Products,Payment.

7.Click on the drop down option on the payment column and select Bucket this column.

8.Bucket Name as Payment type

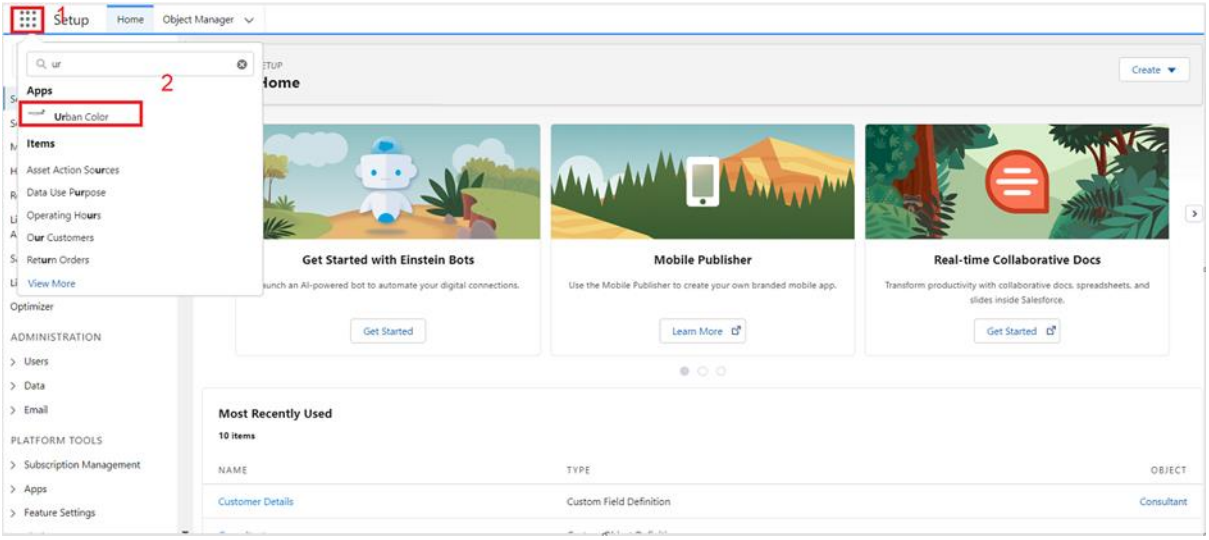
9.Click on Add Bucket and name it as NetBanking

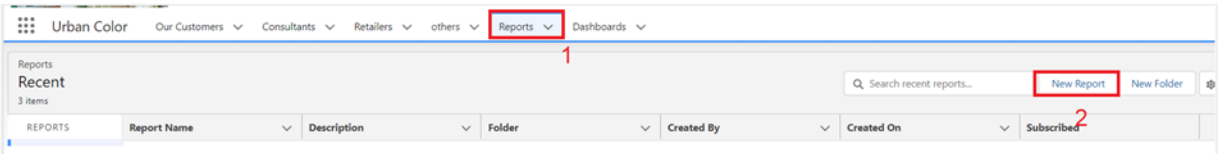
10.Click on Add Bucket and name it as Cash

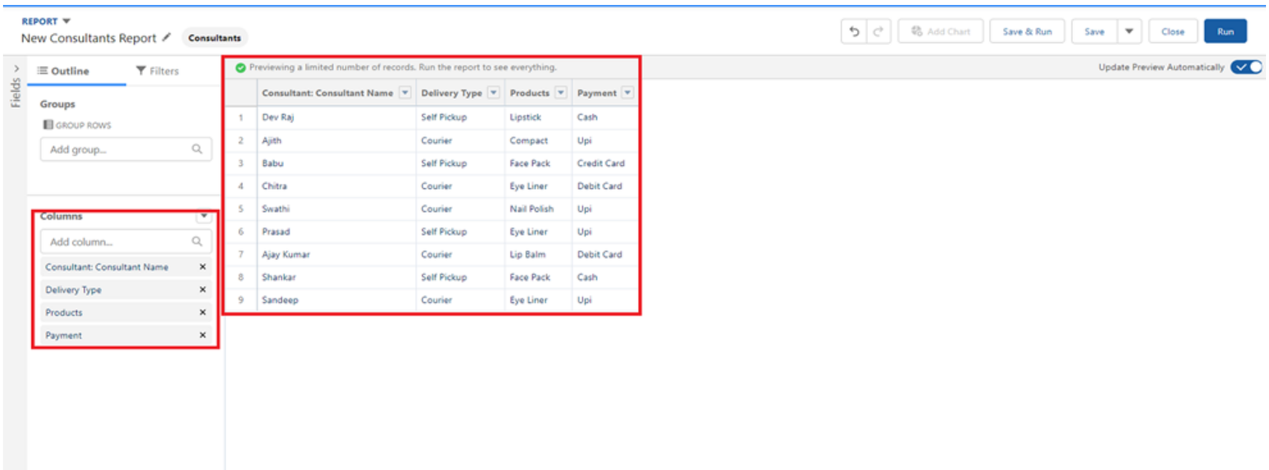
11.Now Click on All Values and select Credit card,Debit card,Upi and Move to Net Banking.

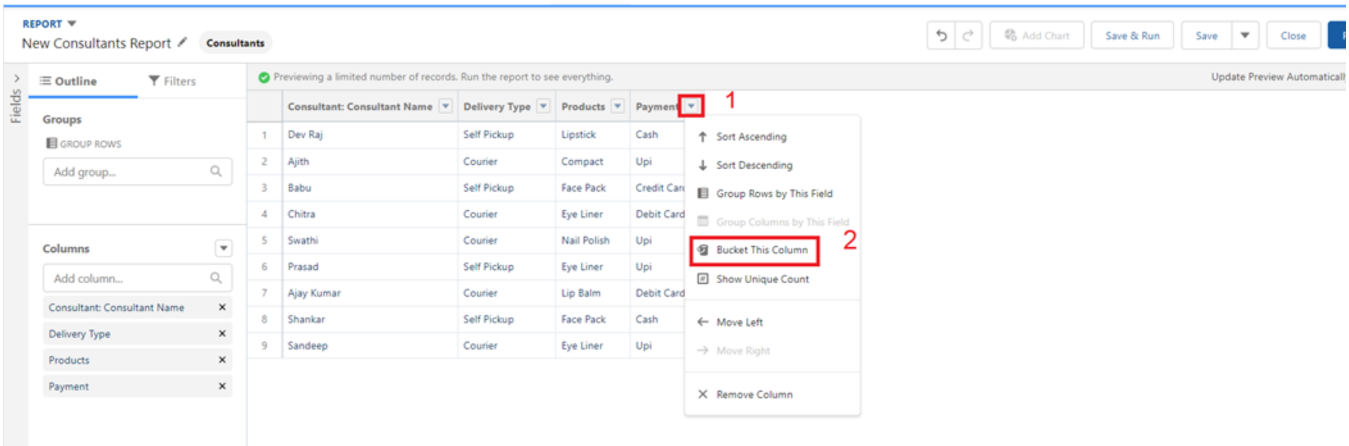
12.Now Click on All Values again and select Cash and Move to Cash.

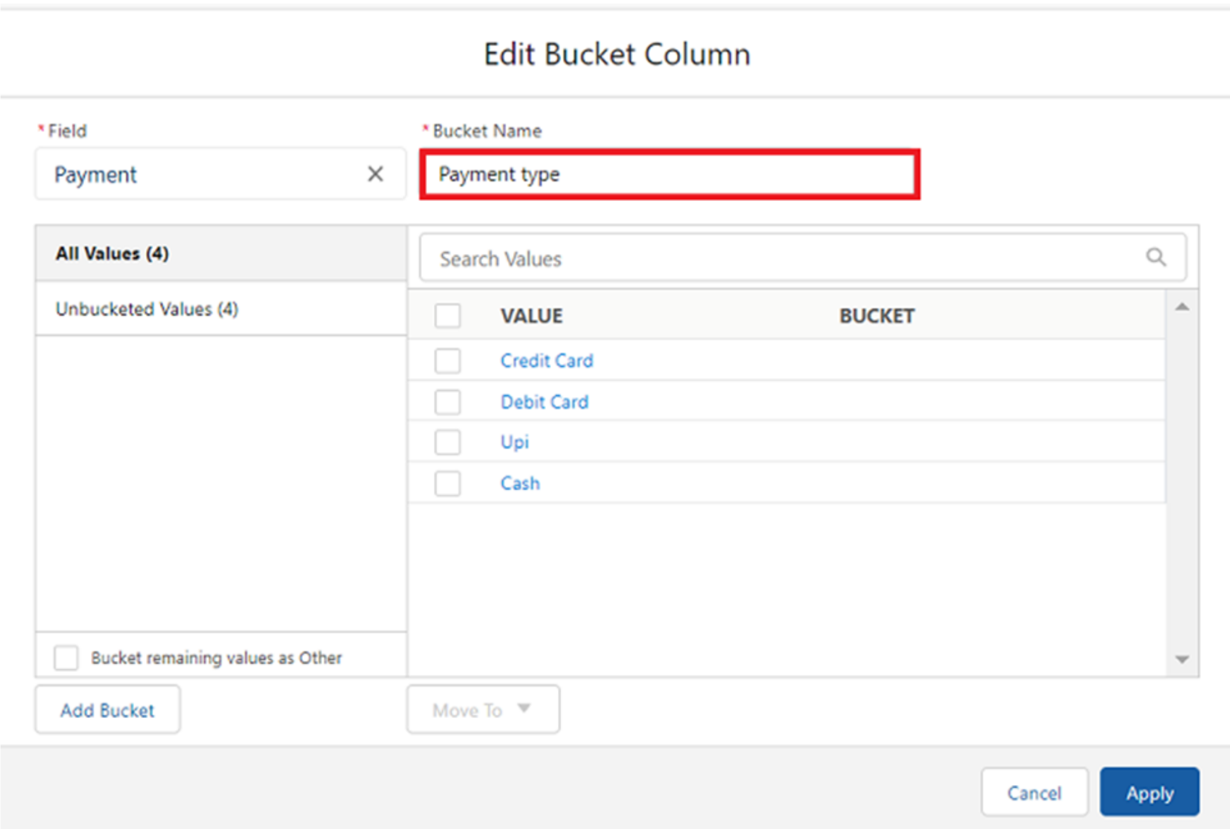
13.Click on Apply.

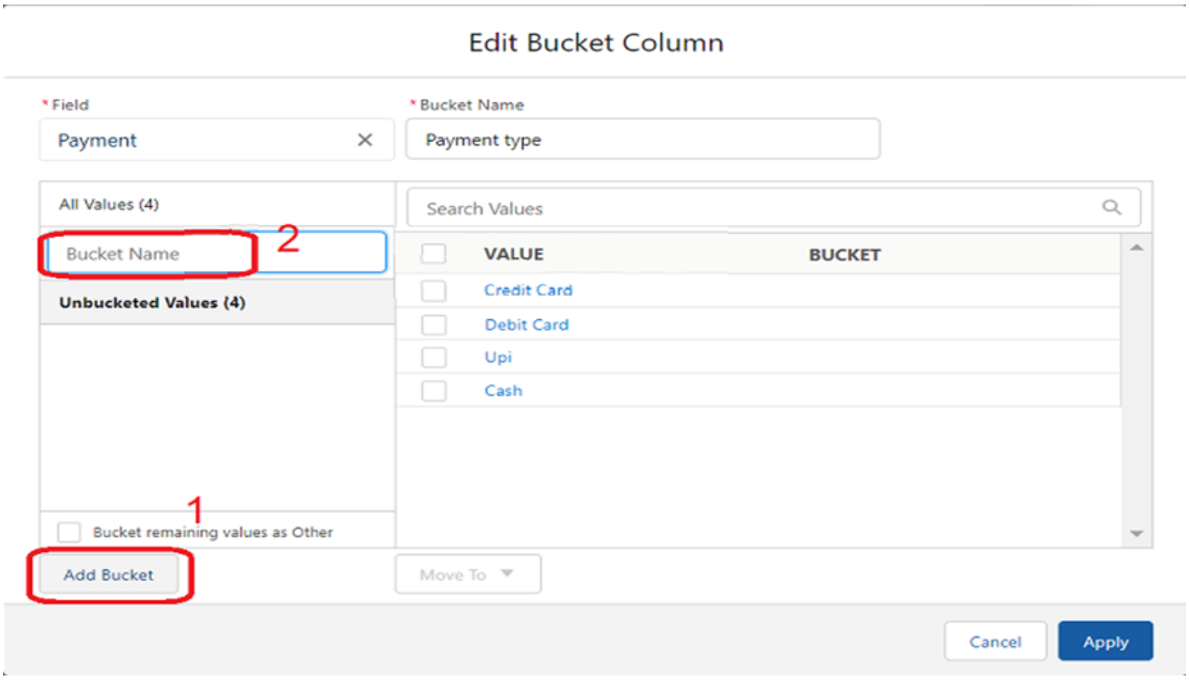


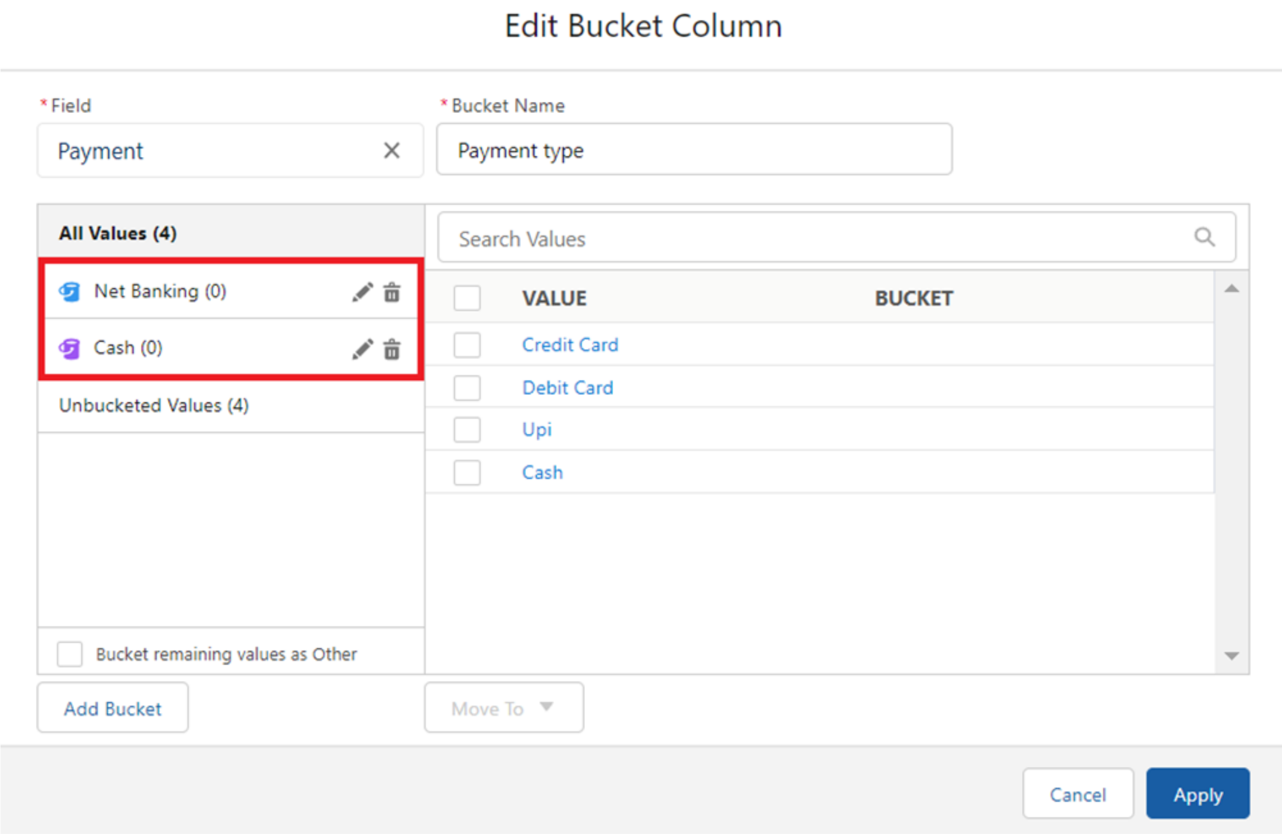


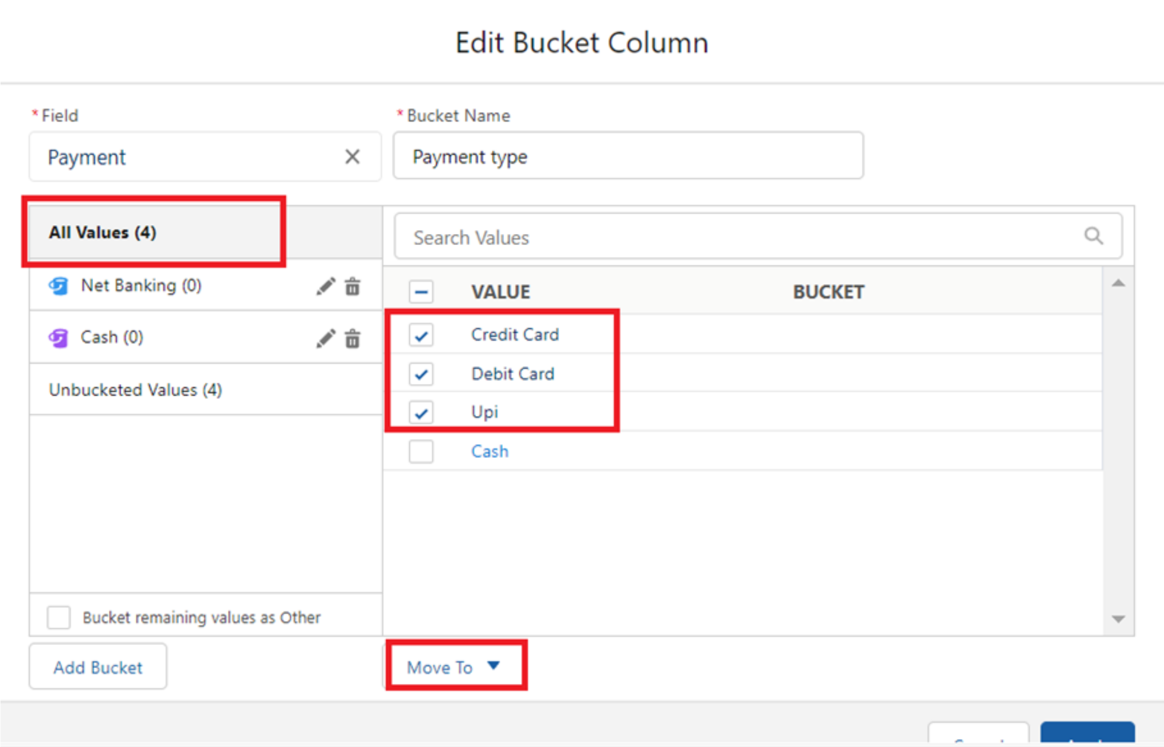


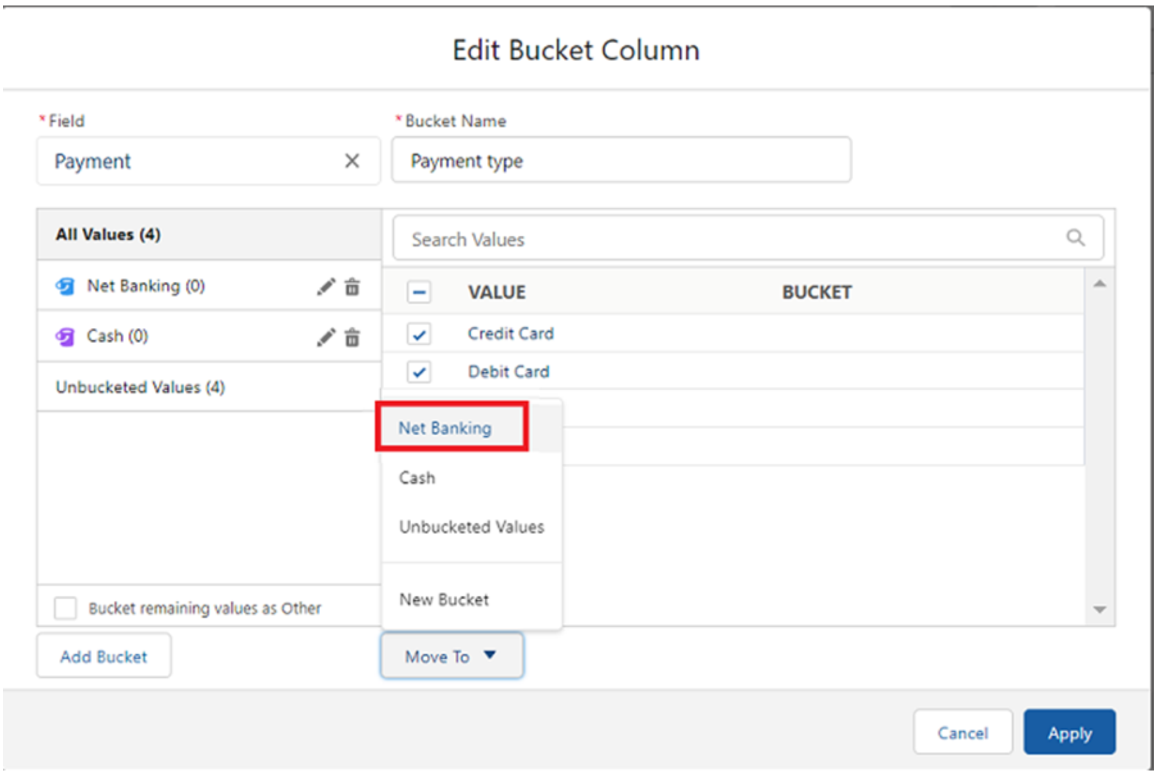

REPORT
New Consultants Report
Consultants
Add Chart
Save & Run
Save
Close
Fields
Outline
Filters
Previewing a limited number of records. Run the report to see everything.
Update Preview Automatically
Groups
GROUP ROWS
Add group...
Columns
Add column...
Consultant: Consultant Name
Delivery Type
Products
Payment
Consultant: Consultant Name
Delivery Type
Products
Payment
1
Dev Raj
Self Pickup
Lipstick
Cash
Ajith
Courier
Compact
Upi
Babu
Self Pickup
Face Pack
Chitra
Courier
Eye Liner
Debit Card
Swathi
Courier
Nail Polish
Upi
Prasad
Self Pickup
Eye Liner
Upi
Ajay Kumar
Courier
Lip Balm
Debit Card
Shankar
Self Pickup
Face Pack
Cash
Sandeep
Courier
Eye Liner
Upi
Sort Ascending
Sort Descending
Group Rows by This Field
Group Columns by This Field
2
Bucket This Column
Show Unique Count
Move Left
Move Right
Remove Column

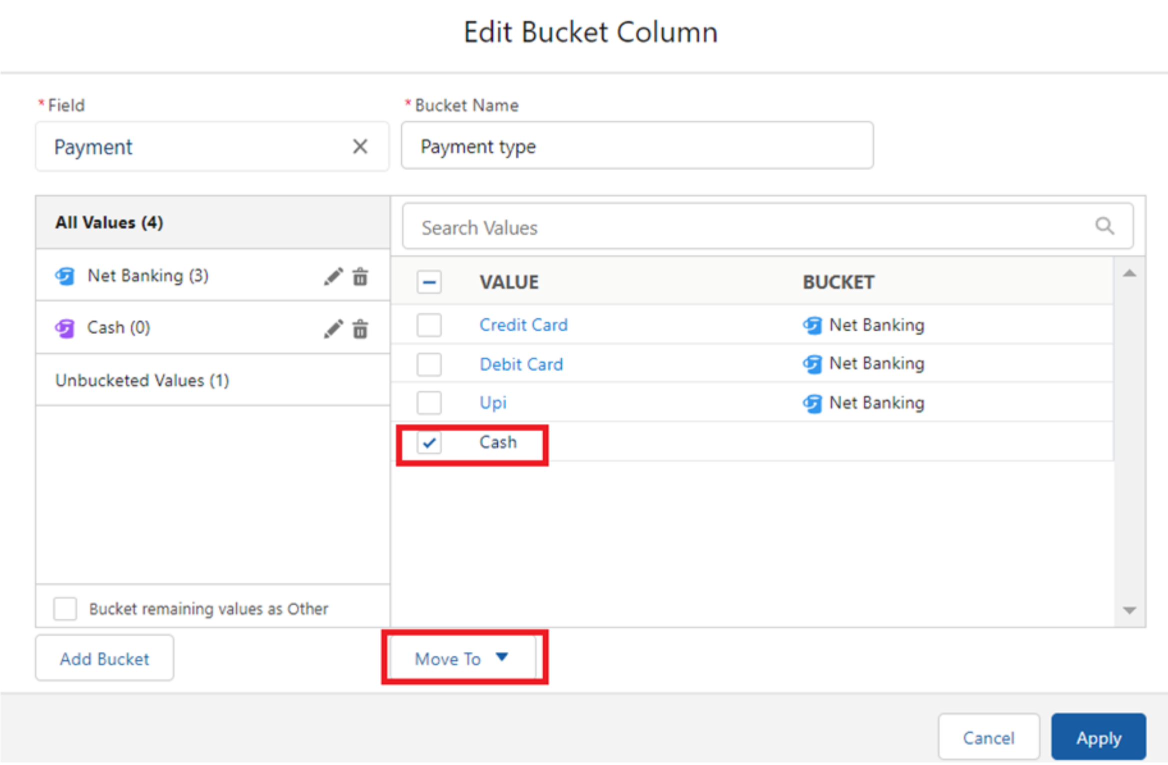

Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Unbucketed Values (4)
Search Values
VALUE
BUCKET
Credit Card
Debit Card
Upi
Cash
Bucket remaining values as Other
Add Bucket
Move To
Cancel
Apply

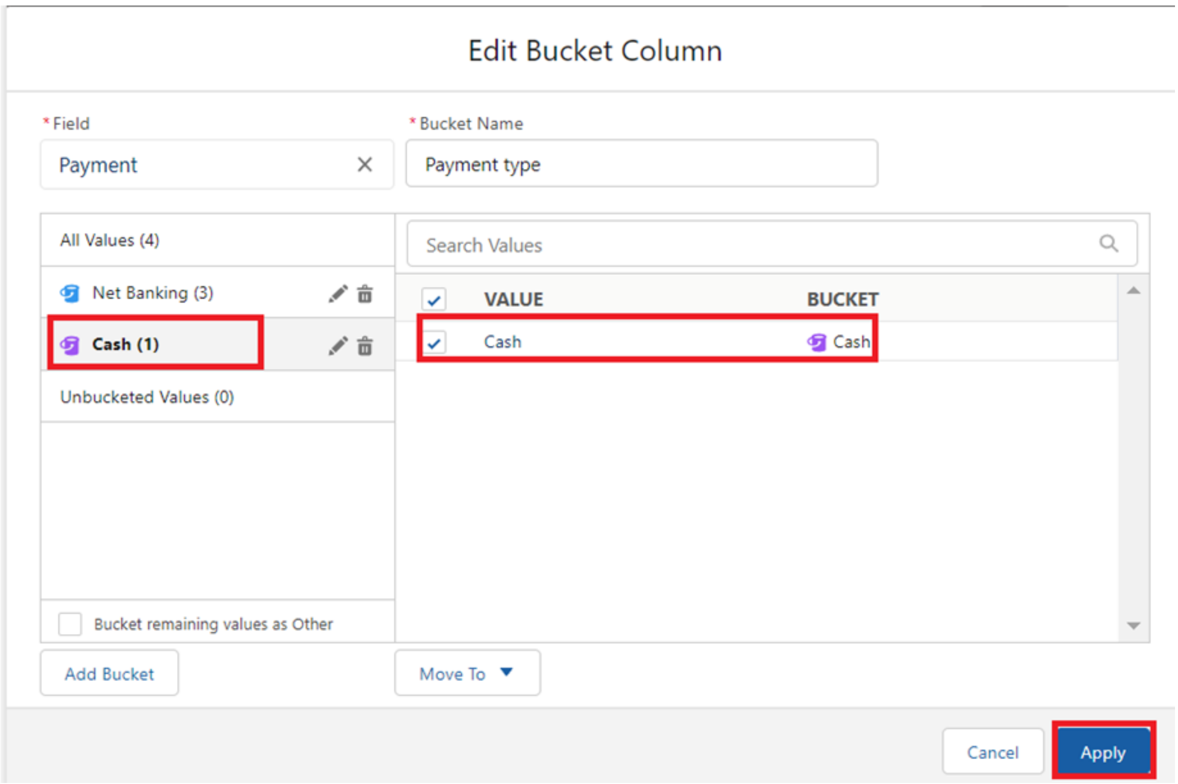

Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Bucket Name
2
Unbucketed Values (4)
Search Values
VALUE
BUCKET
Credit Card
Debit Card
Upi
Cash
1
Bucket remaining values as Other
Add Bucket
Move To
Cancel
Apply


Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Net Banking (0)
Cash (0)
Unbucketed Values (4)
Search Values
VALUE
BUCKET
Credit Card
Debit Card
Upi
Cash
Bucket remaining values as Other
Add Bucket
Move To
Cancel
Apply


Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Net Banking (0)
Cash (0)
Unbucketed Values (4)
Bucket remaining values as Other
Add Bucket
Search Values
VALUE
BUCKET
Credit Card
Debit Card
Upi
Cash
Move To


Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Net Banking (0)
Cash (0)
Unbucketed Values (4)
Bucket remaining values as Other
Add Bucket
Search Values
VALUE
BUCKET
Credit Card
Debit Card
Net Banking
Cash
Unbucketed Values
New Bucket
Move To
Cancel
Apply





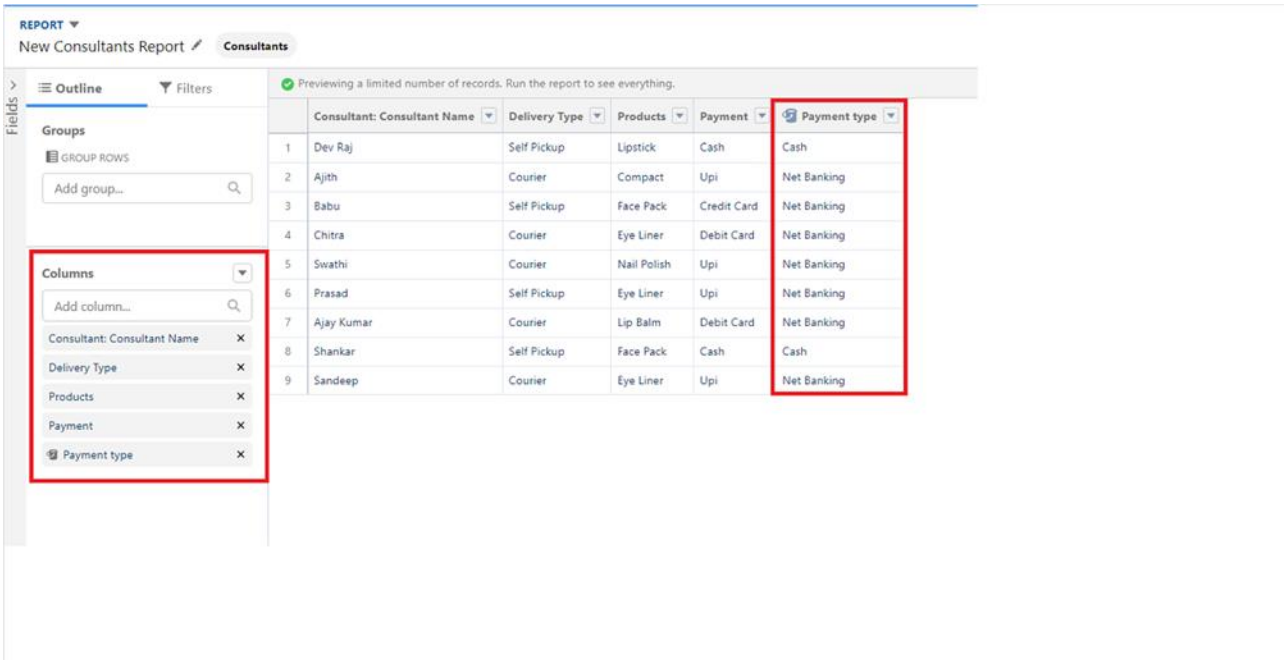
14.In Group Rows Add Payment Type Bucket Field.

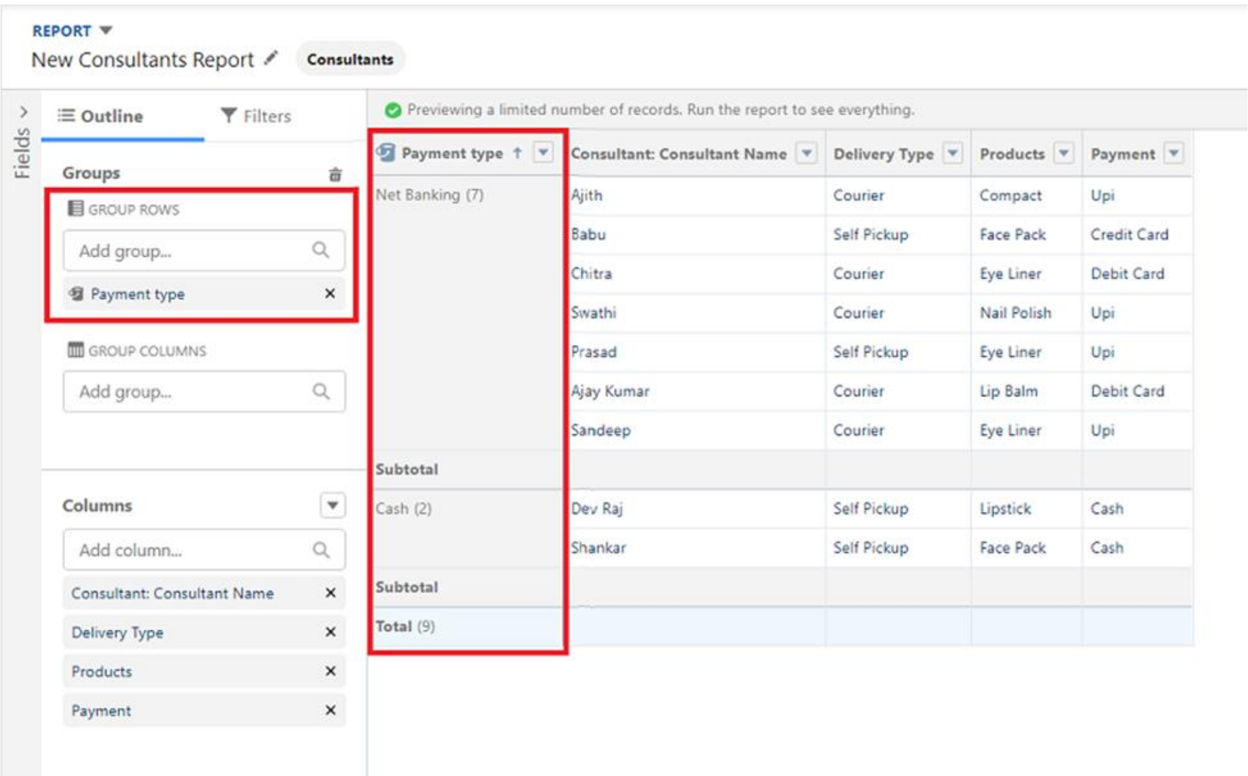
15.Click refresh

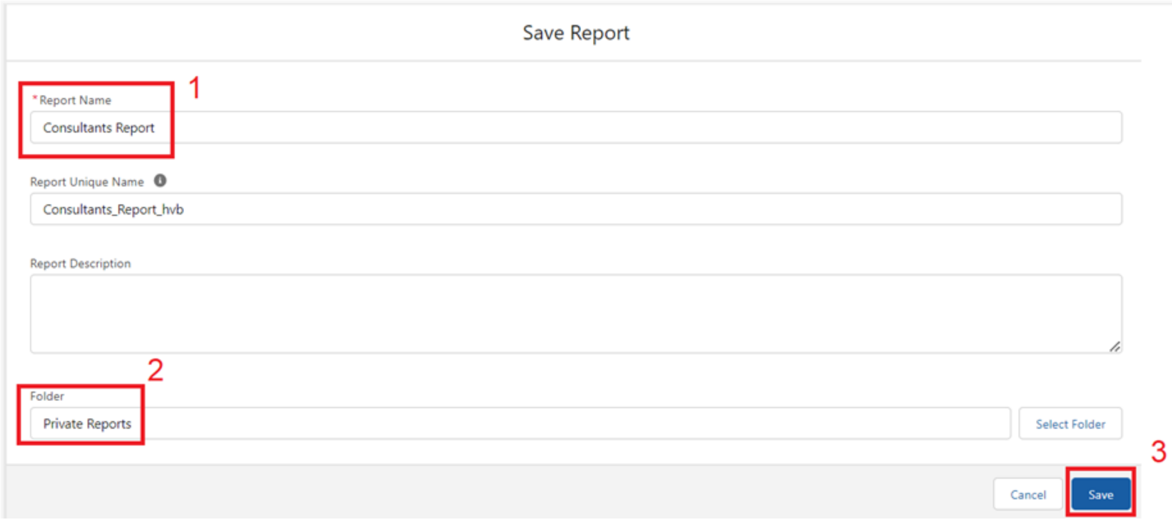
16.Click Save and Run

17.Give report name – Consultant report

18.Click Save

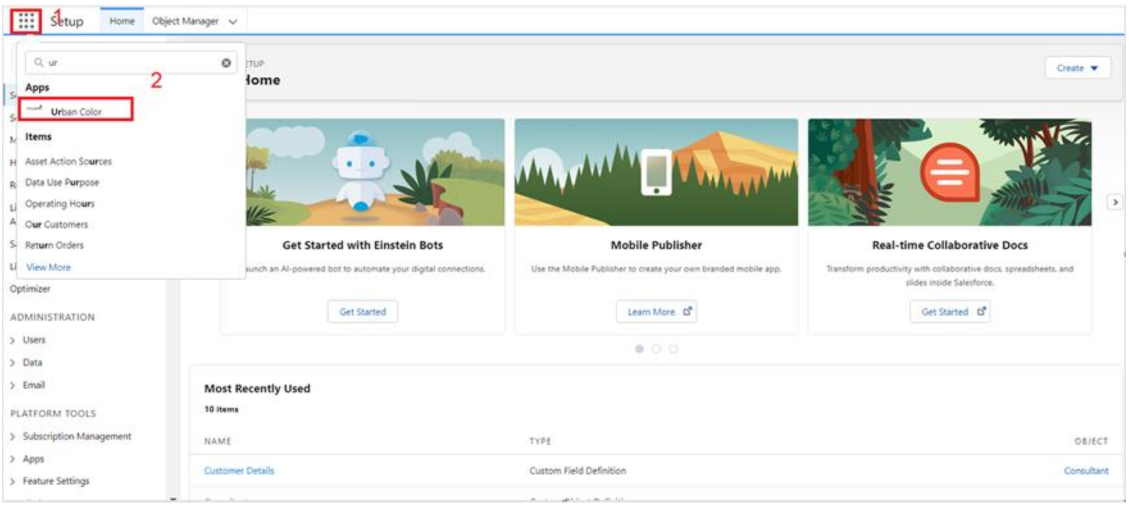


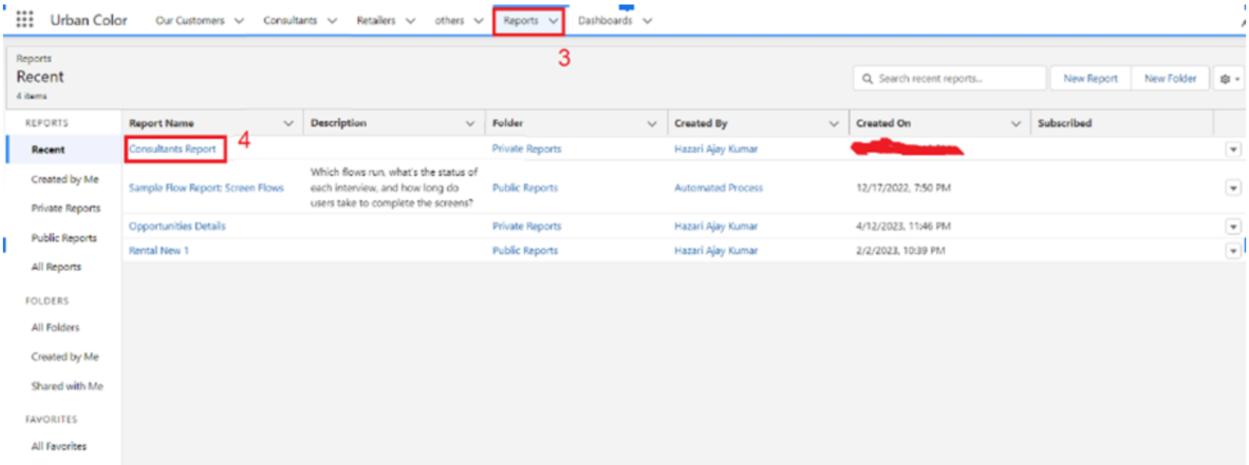




11.2 View Report

1. Click on App Launcher on the left side of the screen.
2. Search Urban Color App & click on it.
3. Click on Reports Tab.
4. Click on Urban Color Report and see records





12.1 Create Dashboard

1.Click on the Dashboards tab from the Urban Color application.

2.Click on the new dashboard.

3.Give name- Consultant Dashboard

4.Click create

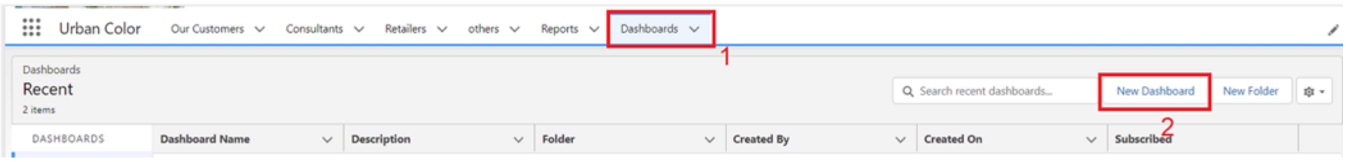
5.Give your dashboard a name and click on +component

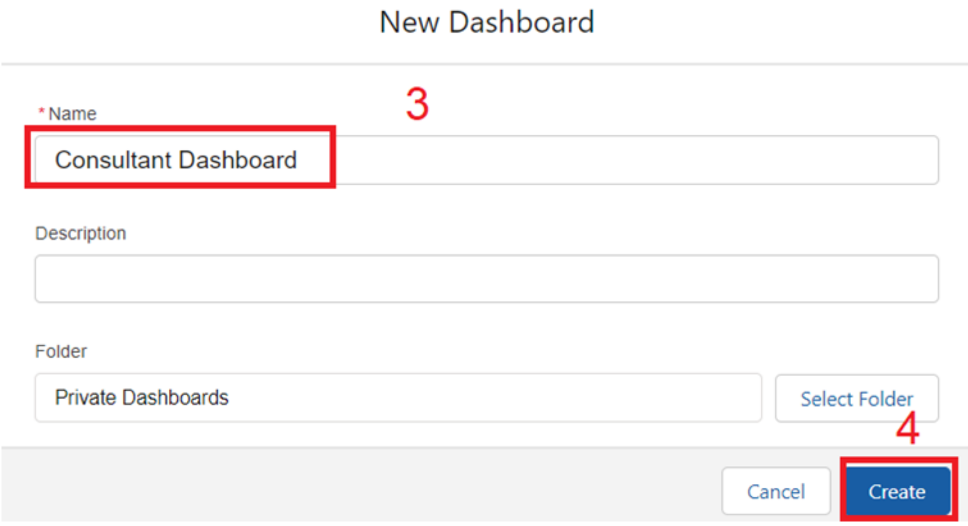
6.Select the Consultants Report which you created.

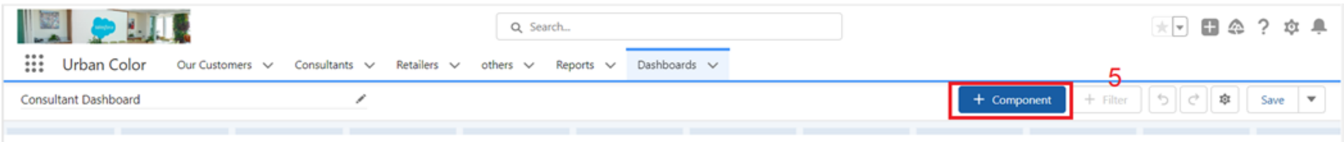
7.For the data visualization select any of the chart, table etc. as per your choice/requirement.

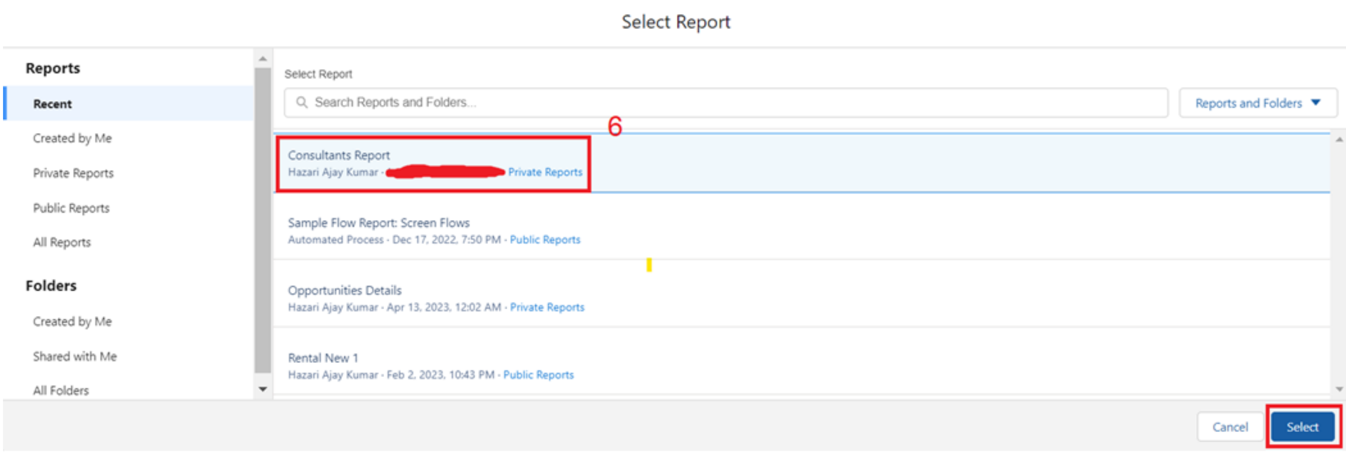
8.Click add.

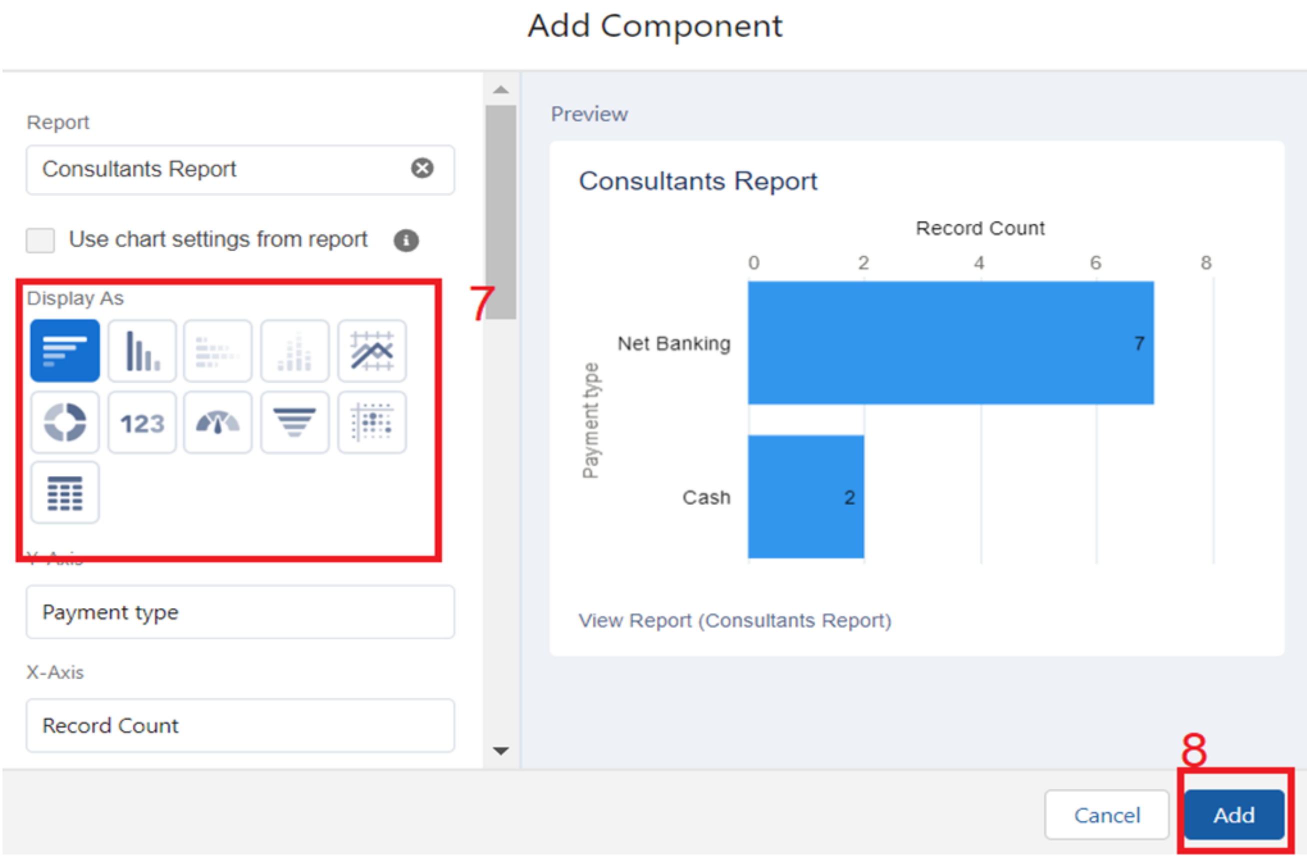
9.Click save.

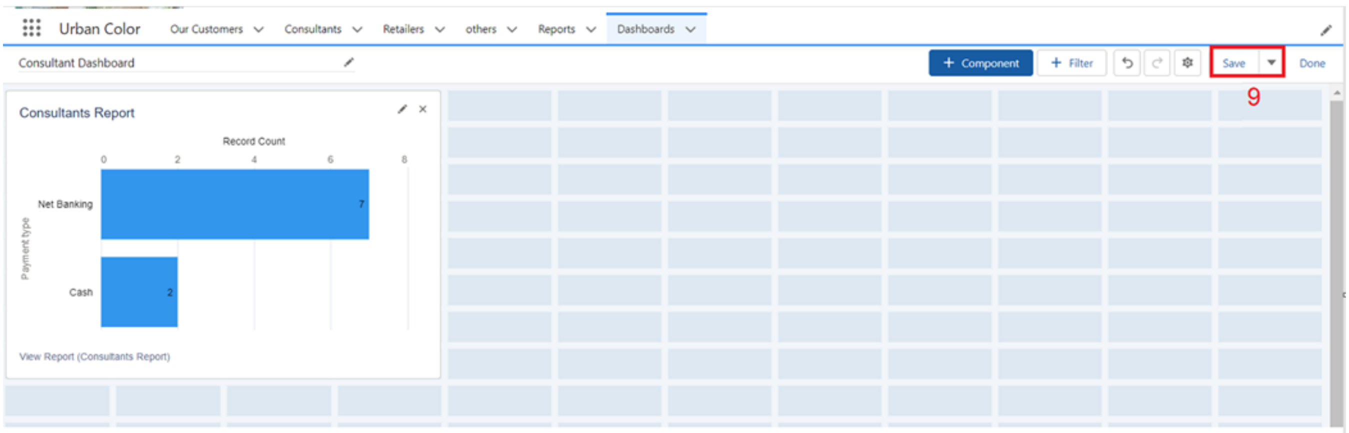



New Dashboard
3
* Name
Consultant Dashboard
Description
Folder
Private Dashboards
Select Folder
4
Cancel
Create


Search...
Urban Color
Our Customers
Consultants
Retailers
others
Reports
Dashboards
Consultant Dashboard
5
+ Component
+ Filter
Save

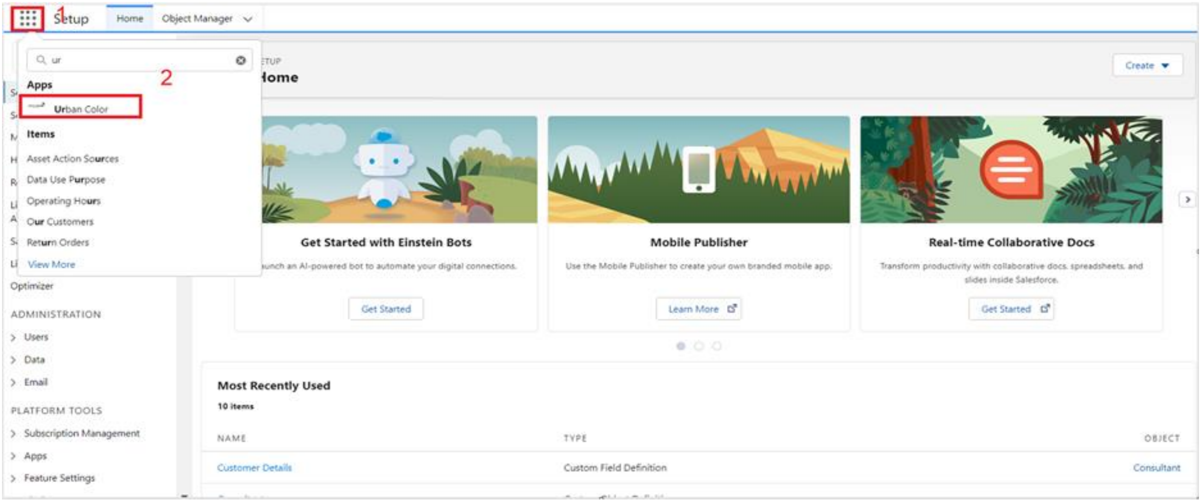

Select Report
Reports
Recent
Created by Me
Private Reports
Public Reports
All Reports
Folders
Created by Me
Shared with Me
All Folders
Select Report
Search Reports and Folders...
Reports and Folders
6
Consultants Report
Hazari Ajay Kumar - [redacted] Private Reports
Sample Flow Report: Screen Flows
Automated Process - Dec 17, 2022, 7:50 PM - Public Reports
Opportunities Details
Hazari Ajay Kumar - Apr 13, 2023, 12:02 AM - Private Reports
Rental New 1
Hazari Ajay Kumar - Feb 2, 2023, 10:43 PM - Public Reports
Cancel
Select

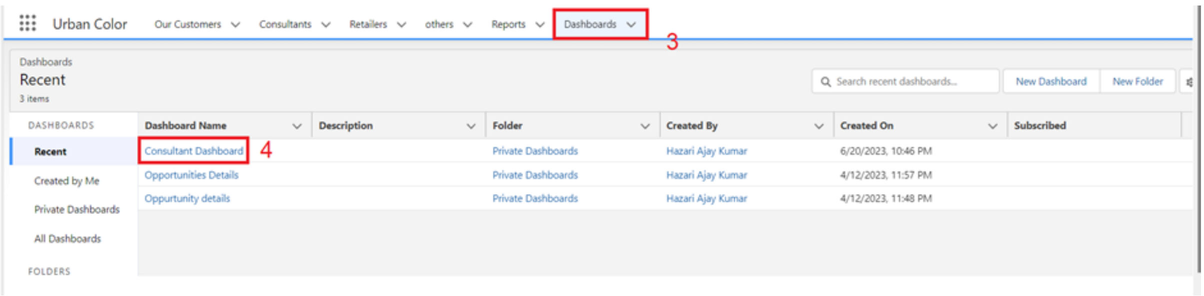




12.2 View Dashboard

1. Click on App Launcher on the left side of the screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Dashboard Tab.
4. Click on Candidate Internal Result Card see graph view of records

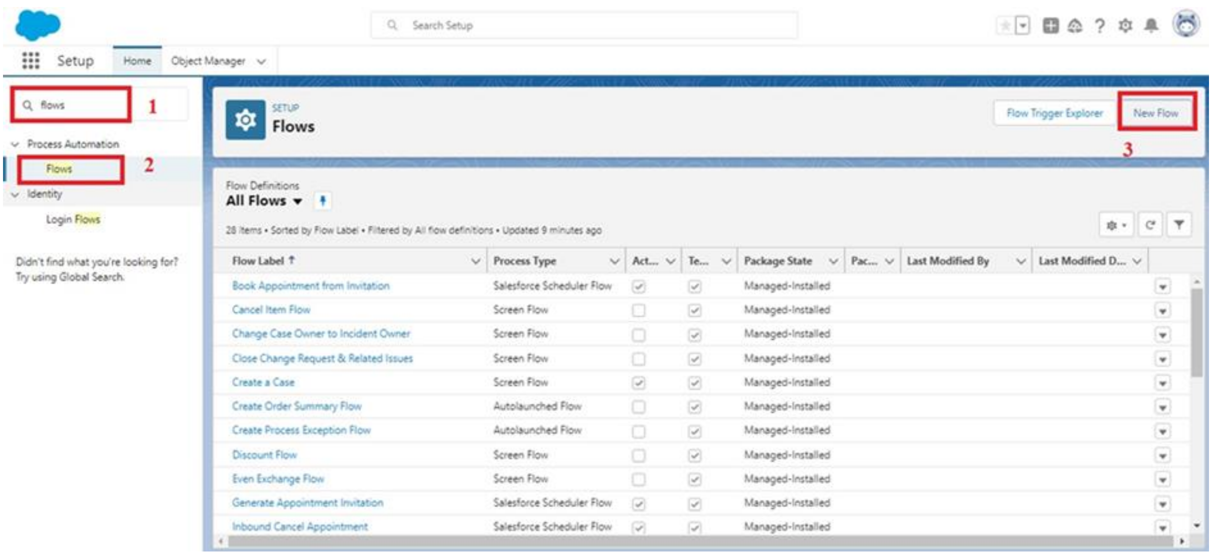




13. Creation Of Screen Flow

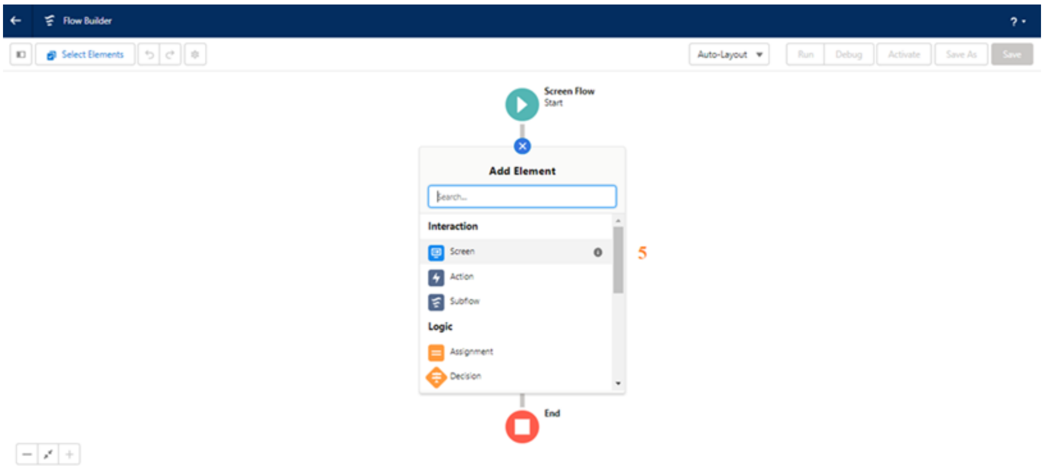
1. Click on Gear icon and select setup
2. In Quick find Box enter flow and select the flows

3.Click on New flow and Select Screen flow



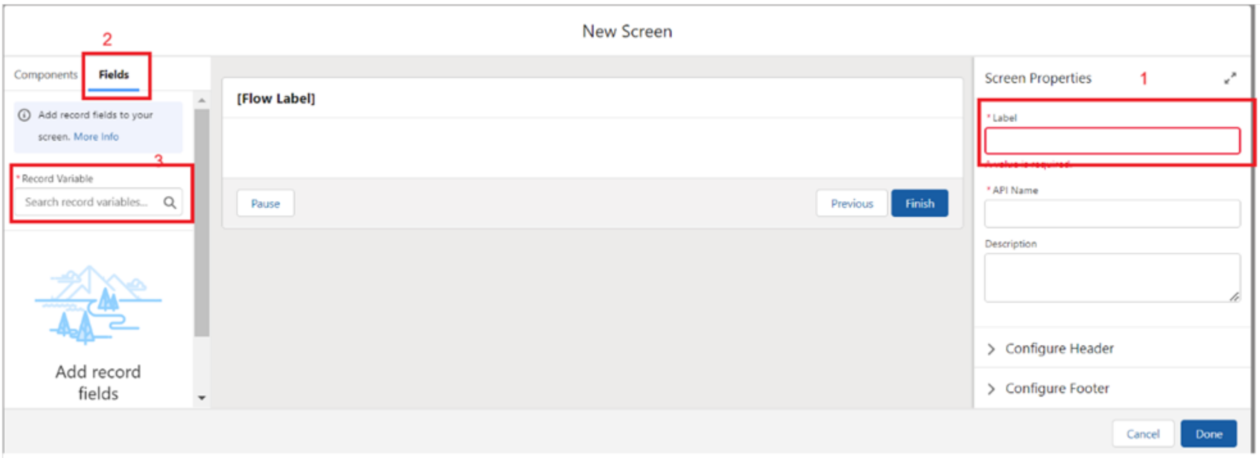
4. It will open the canvas. Select (+)

5. Select the screen element from the drop down.



6. 6. It will open the dialog box. Now give the label name and api name will be auto populated. These labels are for your screen Element.

Label: Consultantrecordcreation
API Name: Consultantrecordcreation (This field will be auto populated.)



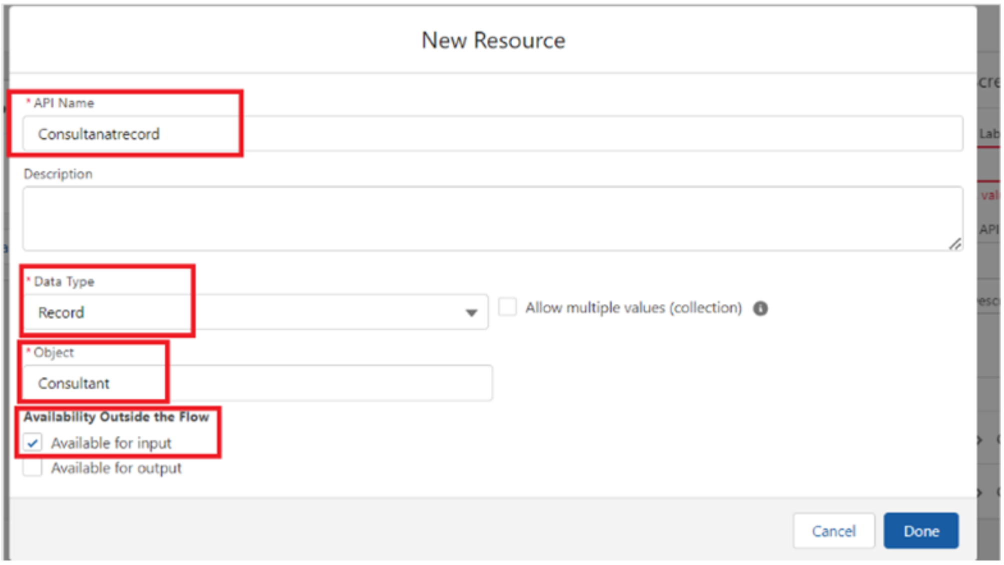
7. Select Fields in New Screen Page From Left Pane and Select New Resource from Resource Variable.

API Name: Consultanatrecord .

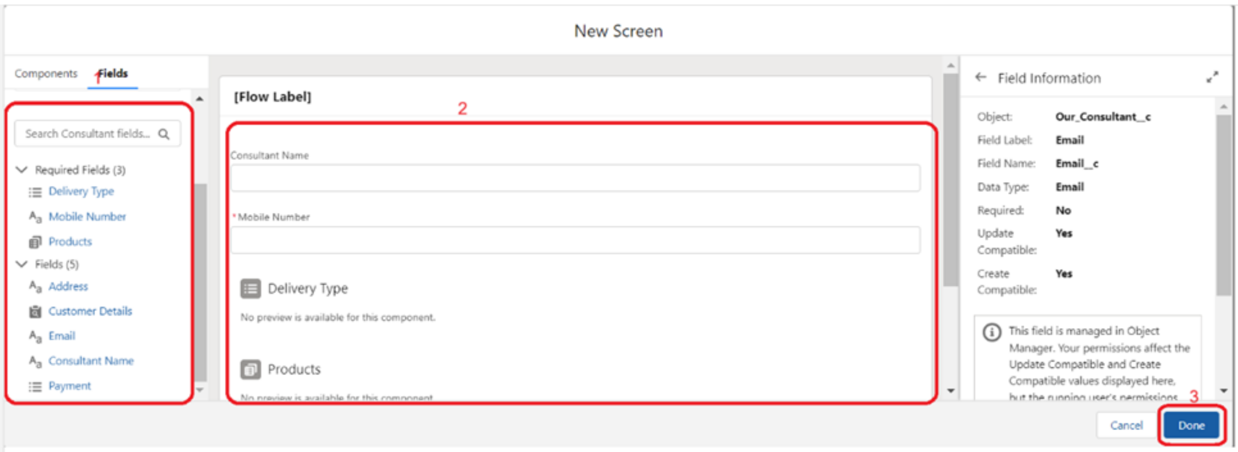
Data Type: Record

Object: Consultant

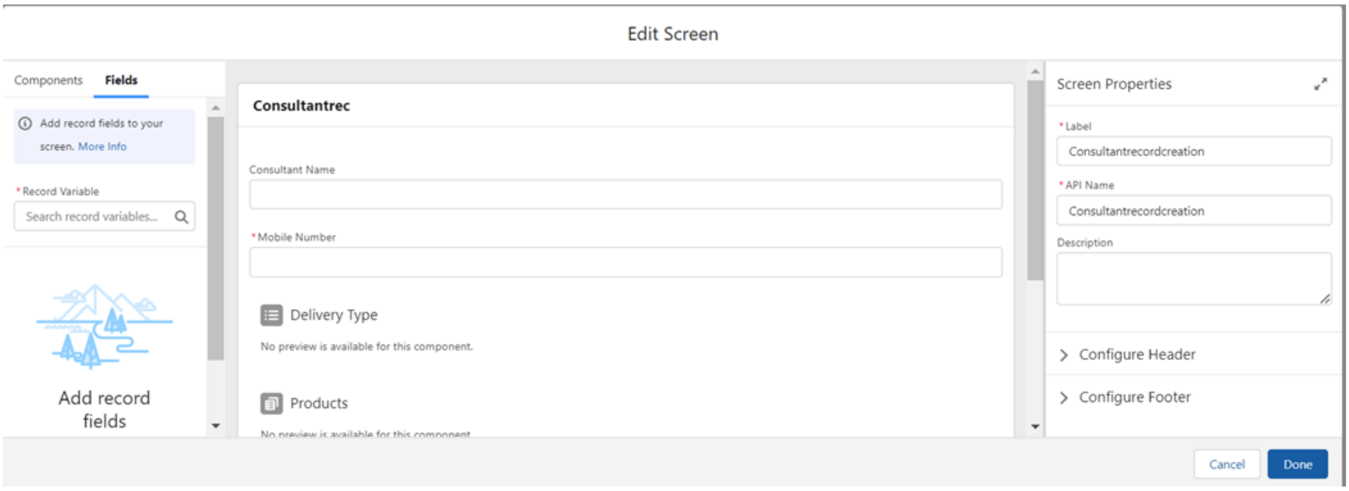
Available for input=True



8.Click on Done.



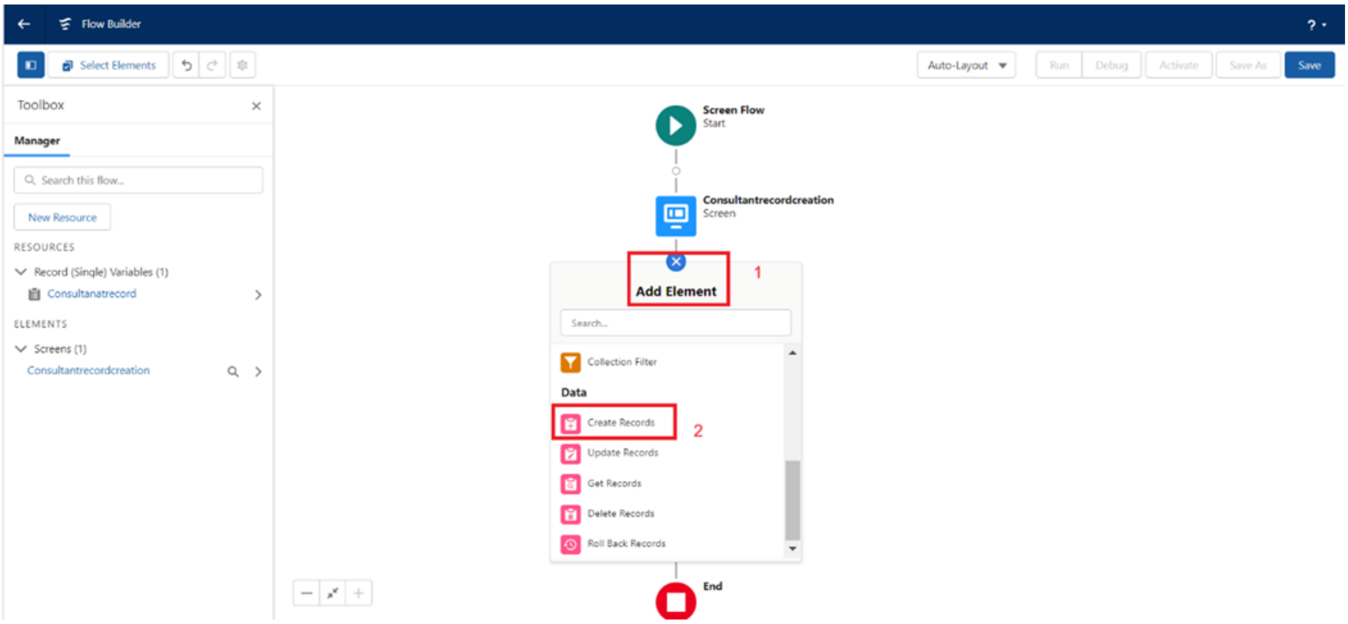
9.Drag Consultant Name, Mobile Number, Delivery Type, Products ,Email from Left Fields Pane to Flow Label Pane.



10.Click on Done.

11.Select (+)

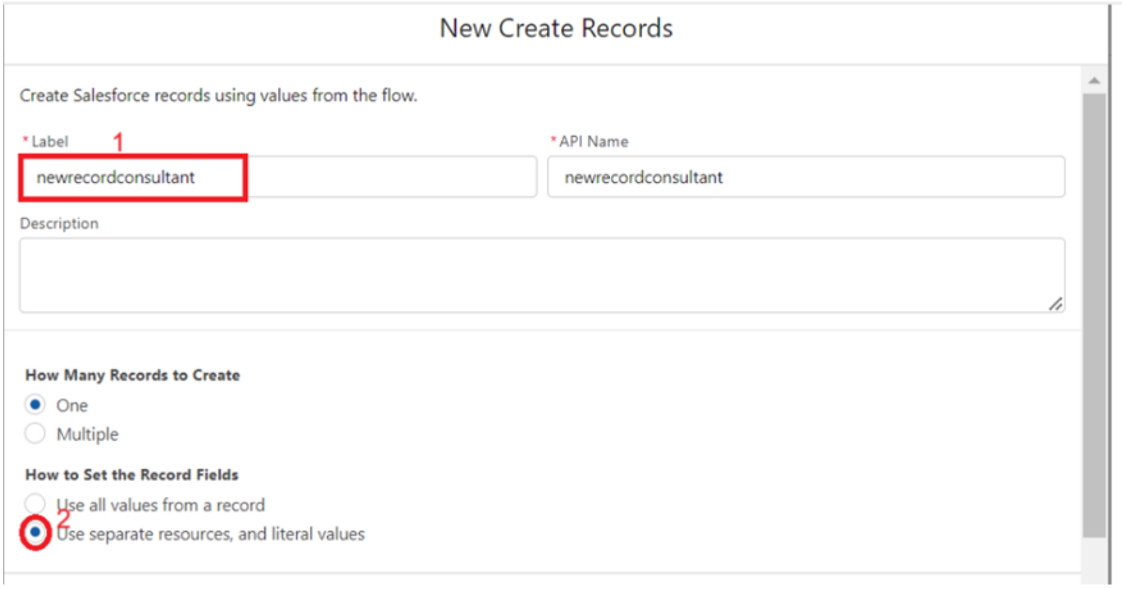
12.In search bar search for Create records and select the create records



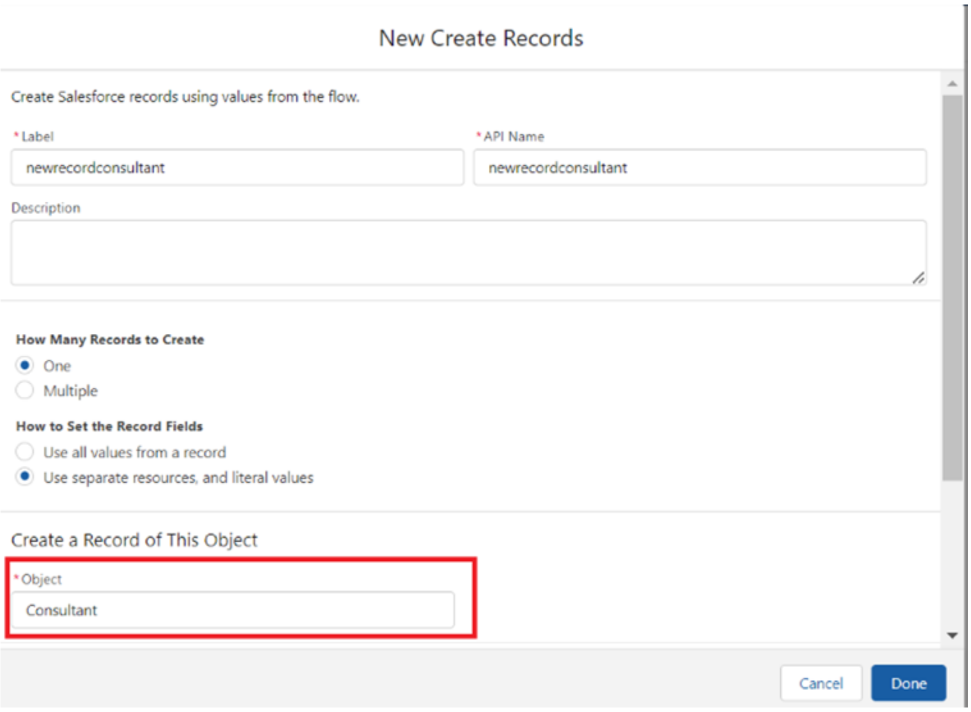
13.It will open you the details section and give the label as follows:

Label: newrecordconsultant
API Name: newrecordconsultant

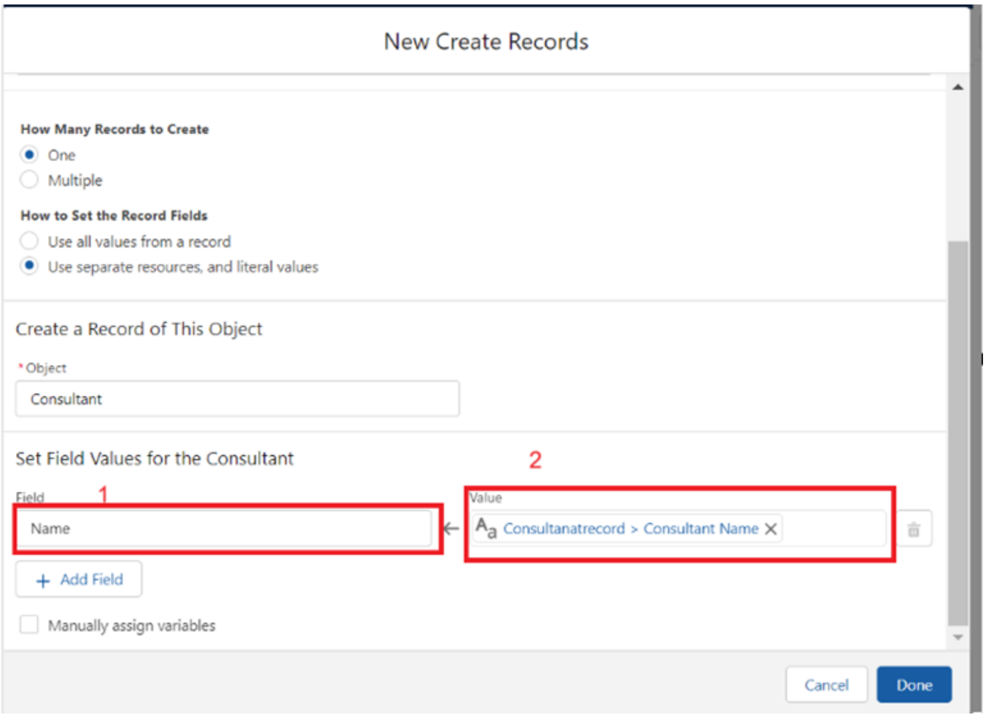
14.Then check the use separate resources and literal values



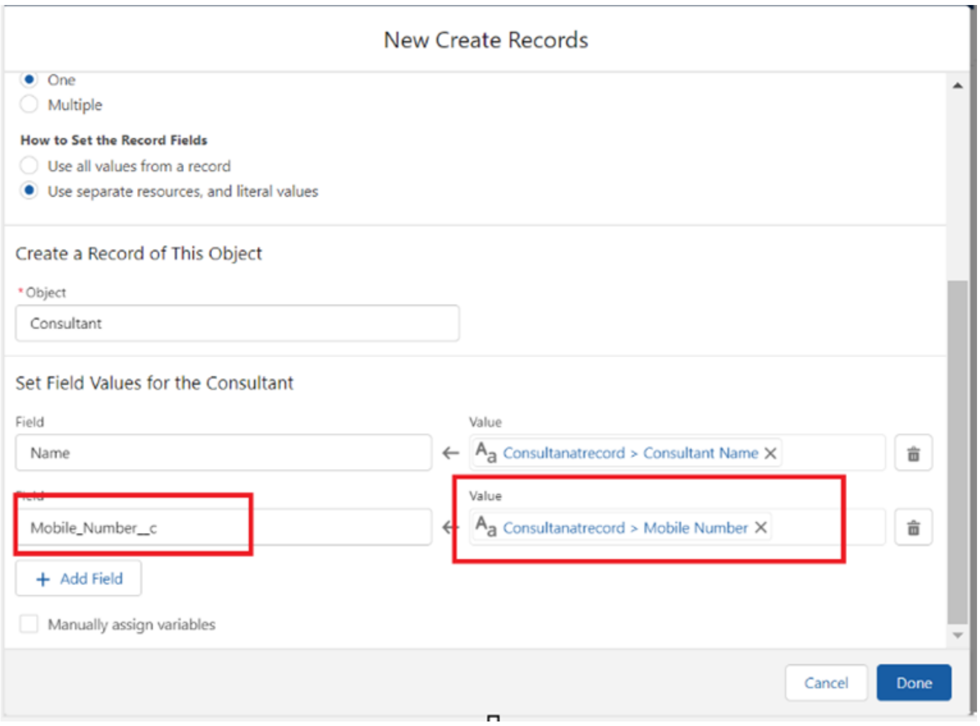
15.Search for Consultant Object.



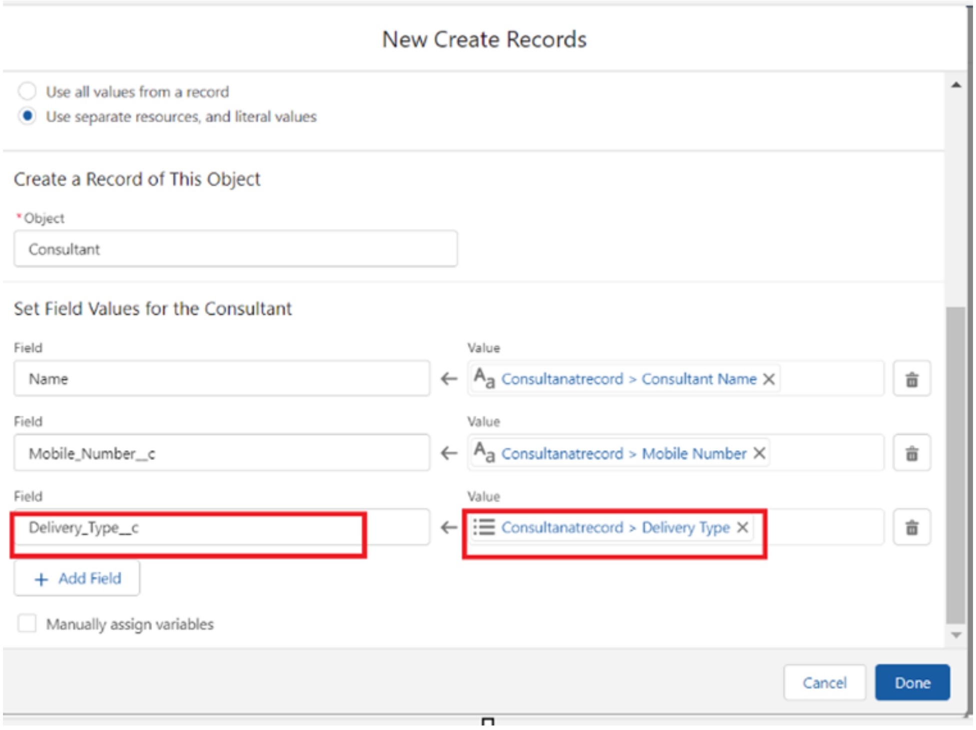
16.Under field type name and select the name and select the Consultantrecord and then name under Screen Component



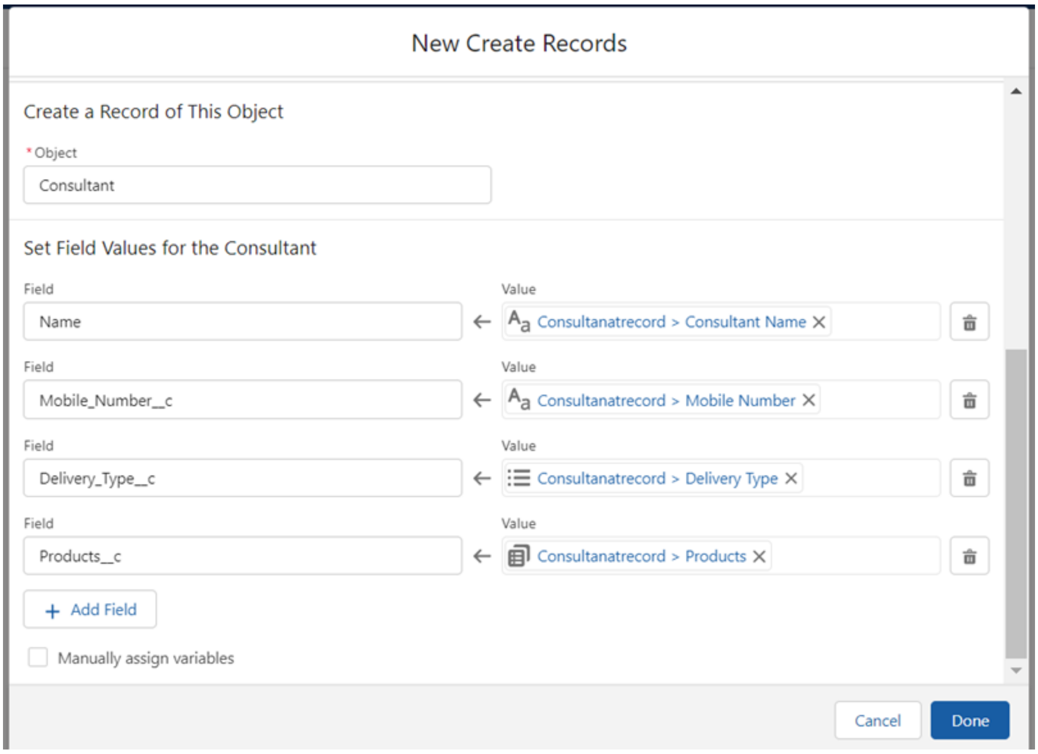
17. Similarly, field type name and select the name and select the Consultantrecord and then Mobile No under Screen Component.



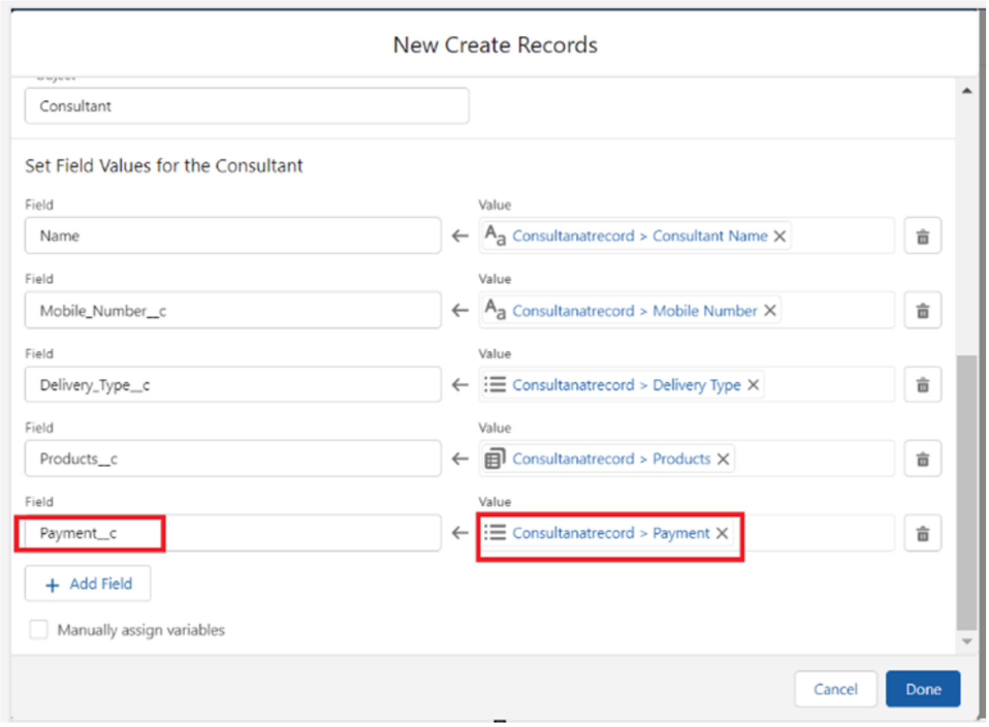
18. Similarly, field type name and select the name and select the Consultantrecord and then Delivery Type under Screen Component.



19. Similarly, field type name and select the name and select the Consultantrecord and then Product Type under Screen Component.

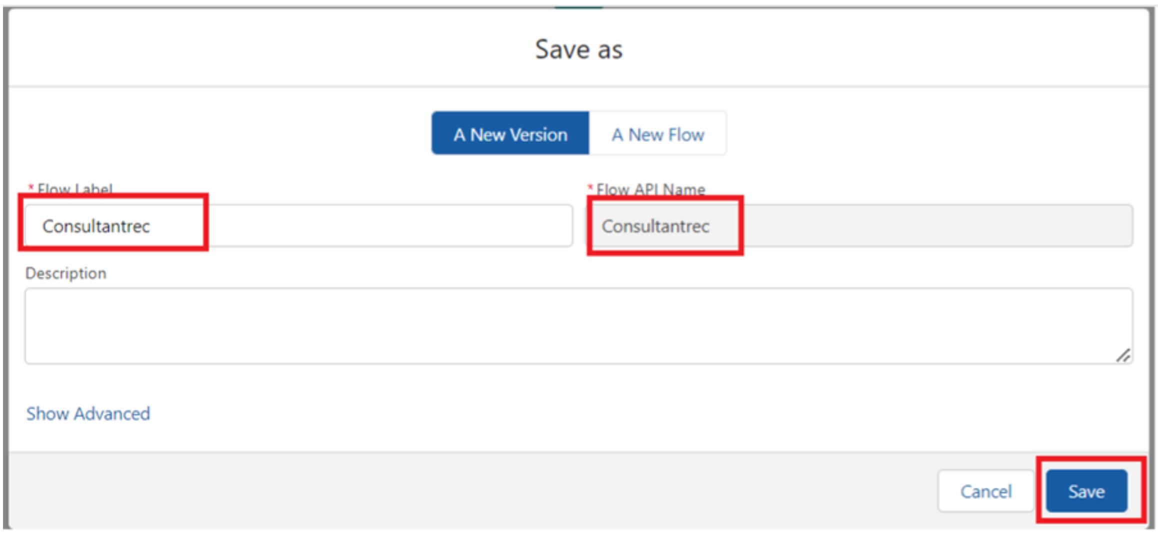


20. Similarly, field type name and select the name and select the Consultantrecord and then Payment under Screen Component.



21.Click on Done

22.Click on Save. It will open you details canva and give the details as follows.



Flow label: Consultantrec

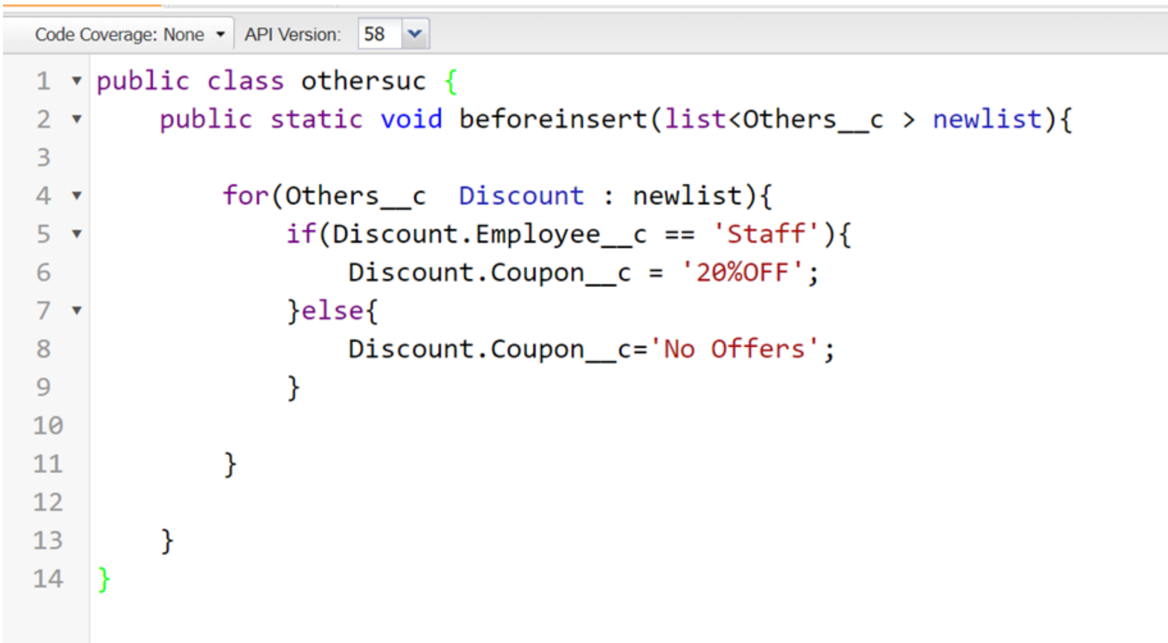
Flow API Name: Consultantrec (this will be auto populated)

1. Click on save
2. Click on the Activate.

14. Apex Trigger

Whenever a Employee is inserted if the Employee is Equal to Staff it must update the Coupon field to 20%off or else it must update to No Offers.

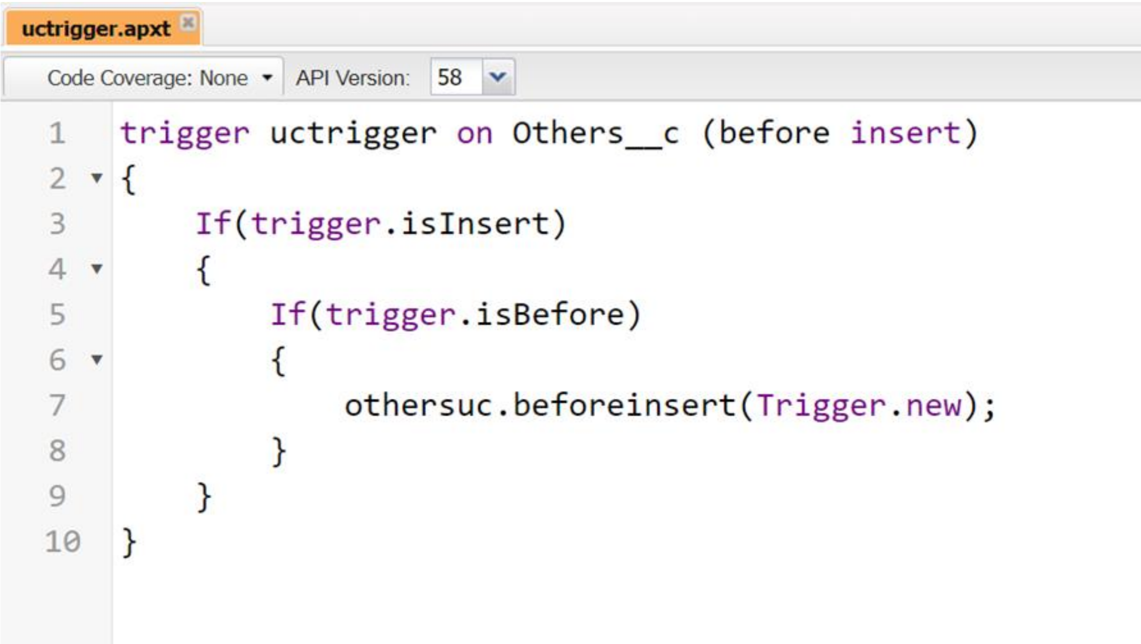
1. Go to the gear icon and select the developer console.
2. From the menu bar click on file and select Apex class.
3. Now give the class name as othersuc
4. Now Write the below code




```
public class othersuc {
   public static void beforeinsert(list<Others__c > newlist){

      for(Others__c  Discount : newlist){
         if(Discount.Employee__c == 'Staff'){
            Discount.Coupon__c = '20%OFF';
         }else{
            Discount.Coupon__c='No Offers';
         }

      }

   }
```

}

5. From the menu bar click on file and select Apex trigger.
6. Now give the trigger name as uctrigger
7. Now write the below code




```
trigger uctrigger on Others__c (before insert)
{
    If(trigger.isInsert)
    {
        If(trigger.isBefore)
        {
            othersuc.beforeinsert(Trigger.new);
        }
    }
}
```