

# **Cosmetics Store Management using Salesforce**



**NAAN MUDHALVAN**

## **PROJECT REPORT**

Submitted by

<b>ARUN. J</b>	<b>(au620120104008)</b>
<b>MANIKANDAN. A</b>	<b>(au620120104308)</b>
<b>MAHADEVAN. T</b>	<b>(au620120104055)</b>
<b>AJMAL AKRAM. S</b>	<b>(au620120104003)</b>

*In partial fulfillment of the award of the degree of*

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*in*  
**COMPUTER SCIENCE AND ENGINEERING**

**AVS ENGINEERING COLLEGE**

**AMMAPET, SALEM- 636 003**

**ANNA UNIVERSITY :: CHENNAI 600 025**

## **BONAFIDE CERTIFICATE**

Certified that this project report “**Cosmetics Store Management**” is the bonafide work of “**ARUN. J (au620120104008), MANIKANDAN. A (au620120104308), MAHADEVAN. T (au620120104055), AJMAL AKRAM. S (au620120104003)**” who carried out the project work under my supervision.

### **SIGNATURE**

#### **HEAD OF THE DEPARTMENT**

**Prof. V. Meena, M.E.,**

Assistant Professor,

Department of CSE,

AVS Engineering College,

Salem- 636003.

### **SIGNATURE**

#### **PROJECT SUPERVISOR**

**Mr. G. ArokiaNathan, M.E.,**

Assistant Professor,

Department of CSE,

AVS Engineering College,

Salem- 636003.

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**SPOC**

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**HEAD OF THE DEPARTMENT**

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# CHAPTER-1

## PROJECT SPECIFICATION

### 1.1 Project Goal

The primary goal of the Cosmetics Store Management project is to create an efficient and user-friendly solution within Salesforce for cosmetics stores. This solution aims to address several key objectives:

- Operational Efficiency: Streamline and optimize day-to-day operations, including customer record management, order processing, and inventory tracking, to improve overall efficiency.
- Customer Engagement: Enhance customer engagement by providing personalized services, tracking customer preferences, and offering targeted promotions.
- Growth: Facilitate growth by providing the tools and insights necessary for informed decision-making, leading to increased sales and profitability.
- Data Management: Implement a robust data management system to centralize and organize customer information, transaction records, and product inventory.
- Automation: Introduce automation through triggers, flows, and approval processes to reduce manual tasks and improve accuracy in coupon generation and record keeping.
- Reporting and Analysis: Develop an effective reporting and dashboard system to provide valuable insights, aiding in strategic planning and performance evaluation.

This project aims to empower cosmetics stores to efficiently manage their operations, foster stronger customer relationships, and drive growth in a competitive market.

## 1.2 Project Scope

The scope of the Cosmetics Store Management project is comprehensive and covers various aspects of cosmetics store management. This project encompasses the following key components:

1. Custom Object Creation: The creation of custom objects, including "Our Customers," "Consultants," "Retailers," and "Others," to manage customer data, order details, and employee information.
2. User Profiles and Roles: Setting up user profiles and roles to control access and permissions for different user groups, including "Store Head" and "Billing Operator."
3. Automation: Implementing automation through triggers, flows, and approval processes to automate processes like coupon generation based on employee types, data validation, and record updates.
4. Reports and Dashboards: Developing various report types, including tabular, summary, and matrix reports, to provide insights into customer data, product sales, and financial performance. Creating dashboards for data visualization.
5. Data Modeling: Designing the data model with relationships between objects to enable efficient data management, allowing the creation of customer records, order details, and coupon management.
6. Security and Access Control: Ensuring data security and access control through user profiles, roles, and sharing rules to safeguard sensitive information.

The project's scope is designed to provide a holistic solution to cosmetics stores, streamlining their operations, enhancing customer engagement, and fostering growth. This project aims to create a robust, user-friendly system that improves efficiency and effectiveness in cosmetics store management.

### 1.3 Problem Statement Definition

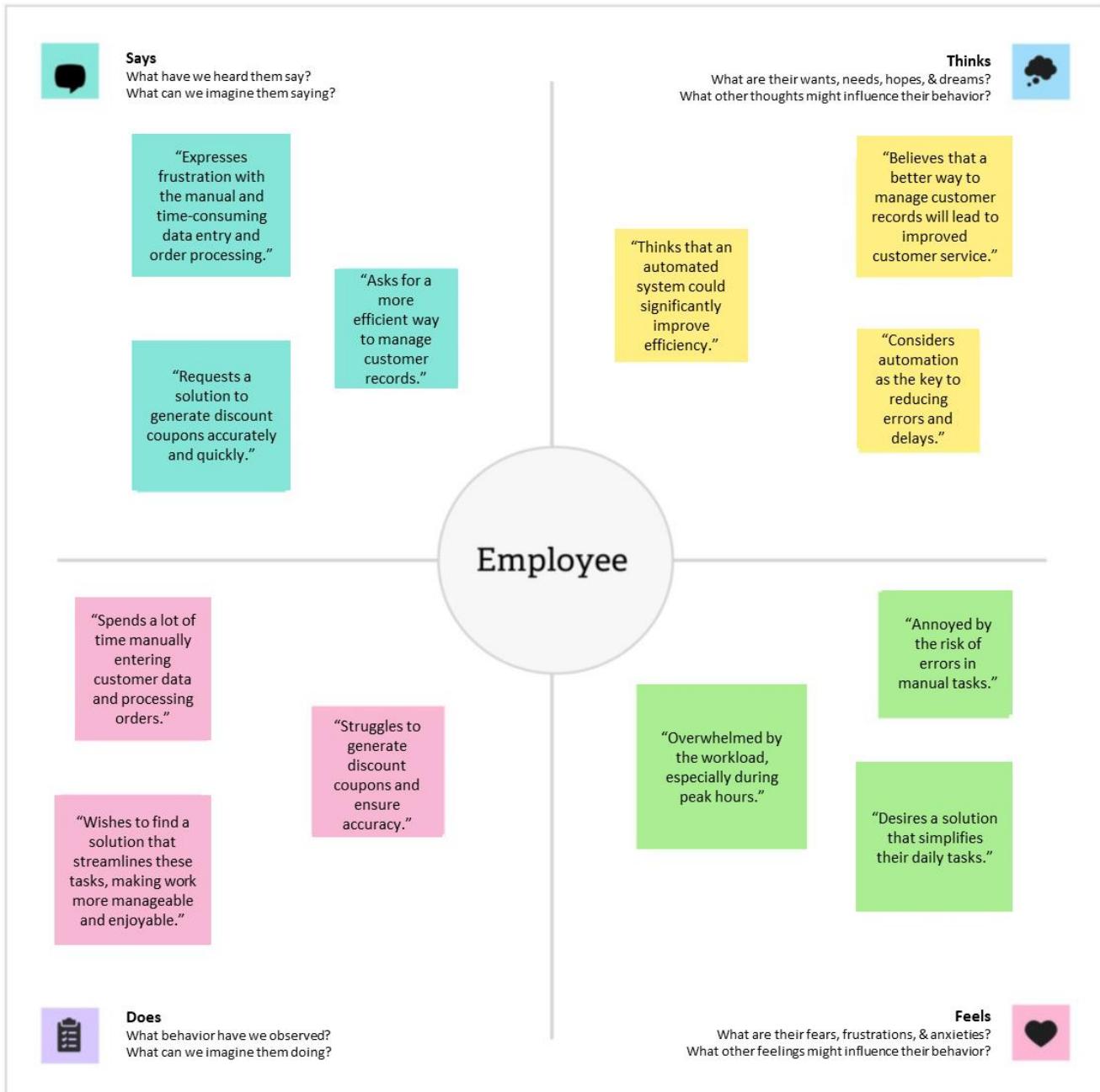
Problem for	Trying to	But	Which makes
<b>Employee</b>	I'm working in a cosmetics store, and I'm trying to efficiently manage customer records, process orders, and generate discount coupons for various types of employees.	But the manual and time-consuming nature of these tasks, along with the risk of errors.	This makes me feel overwhelmed and hinders our ability to provide a seamless customer experience.

### 1.4 Empathy Map Canvas

An empathy map is a simple, easy-to-digest visual that captures knowledge about a user's behavior and attitudes.

It is a useful tool to help teams better understand their users. Creating an effective solution requires understanding the true problem and the person who is experiencing it.

The exercise of creating the map helps participants consider things from the user's perspective along with his or her goals and challenges.



## 1.5 Proposed Solution

S. No	Parameter	Description
1.	Problem Statement	<p>The problem to be solved is the manual and time-consuming management of customer records, order processing, and discount coupon generation, leading to inefficiencies and the risk of errors.</p>
2.	Idea / Solution Description	<p>The proposed solution is to create a Salesforce-based Customer Store Management system. This system will include custom objects for managing customer records, consultants, retailers, and other employees. Automation tools like triggers and flows will streamline data entry, order processing, and coupon generation. The solution will also provide comprehensive reports and dashboards for insights and decision-making.</p>
3.	Novelty / Uniqueness	<p>The uniqueness of this solution lies in its customized implementation using Salesforce. The automation of routine tasks, such as coupon generation based on employee roles, is novel and addresses the specific needs of cosmetics stores.</p>
4.	Social Impact / Customer Satisfaction	<p>The solution is expected to significantly improve customer satisfaction by reducing processing times, minimizing errors, and enhancing the overall shopping experience. It will also lead to improved data management, enabling better customer engagement and personalized services. This project contributes to the efficient management of cosmetics stores, potentially impacting the business's social and financial aspects positively.</p>

## 1.6 Functional & Technical Requirements

### 1.6.1 Functional Requirements

Requirement	Description
Custom Object Creation	Create custom objects for "Our Customers," "Consultants," "Retailers," and "Others" to manage customer data, order details, and employee information.
User Profiles and Roles	Set up user profiles and roles to control access and permissions for different user groups, including "Store Head" and "Billing Operator."
Automation	Implement automation using triggers, flows, and approval processes to automate coupon generation, data validation, and record updates.
Reports and Dashboards	Develop various report types, including tabular, summary, and matrix reports, to provide insights into customer data, product sales, and financial performance. Create dashboards for data visualization.
Data Modeling	Design the data model with relationships between objects to enable efficient data management, allowing the creation of customer records, order details, and coupon management.

### 1.6.2 Technical Requirements

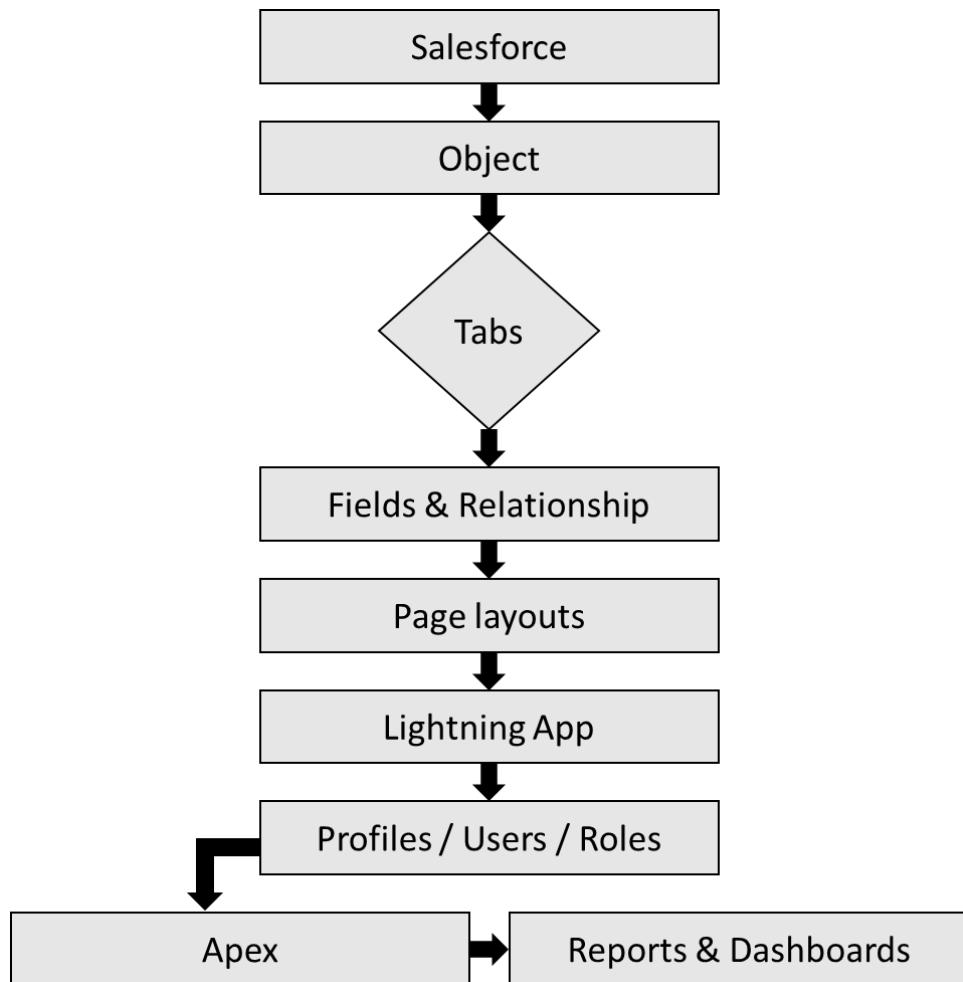
Requirement	Description
Salesforce Developer Org	Create a Salesforce developer org for project development and testing.
Lightning App	Create a Lightning app to brand the application and provide a customized color scheme and logo.
Automation Tools	Use Apex triggers and flows to implement automation in the system.
Security and Access Control	Configure security settings using user profiles, roles, and sharing rules to control access to sensitive data.

User Training	Provide user training and documentation for effective adoption of the Salesforce system within the cosmetics store.
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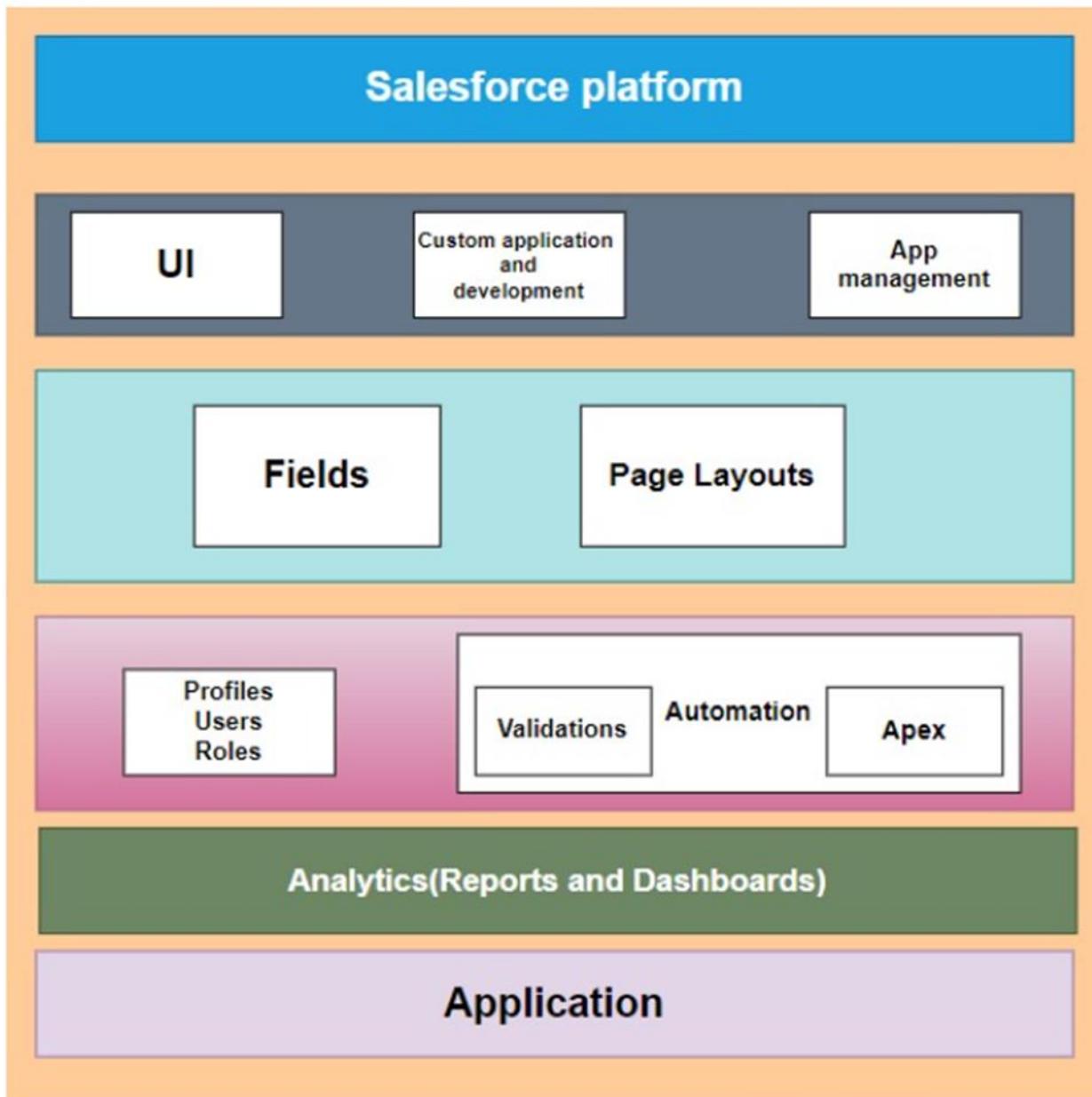
## 1.7 Project Road Map

### 1.7.1 Data Flow Diagram

A Data Flow Diagram (DFD) is a traditional visual representation of the information flows within a system. A neat and clear DFD can depict the right amount of the system requirement graphically. It shows how data enters and leaves the system, what changes the information, and where data is stored.



### 1.7.2 Technical Architecture

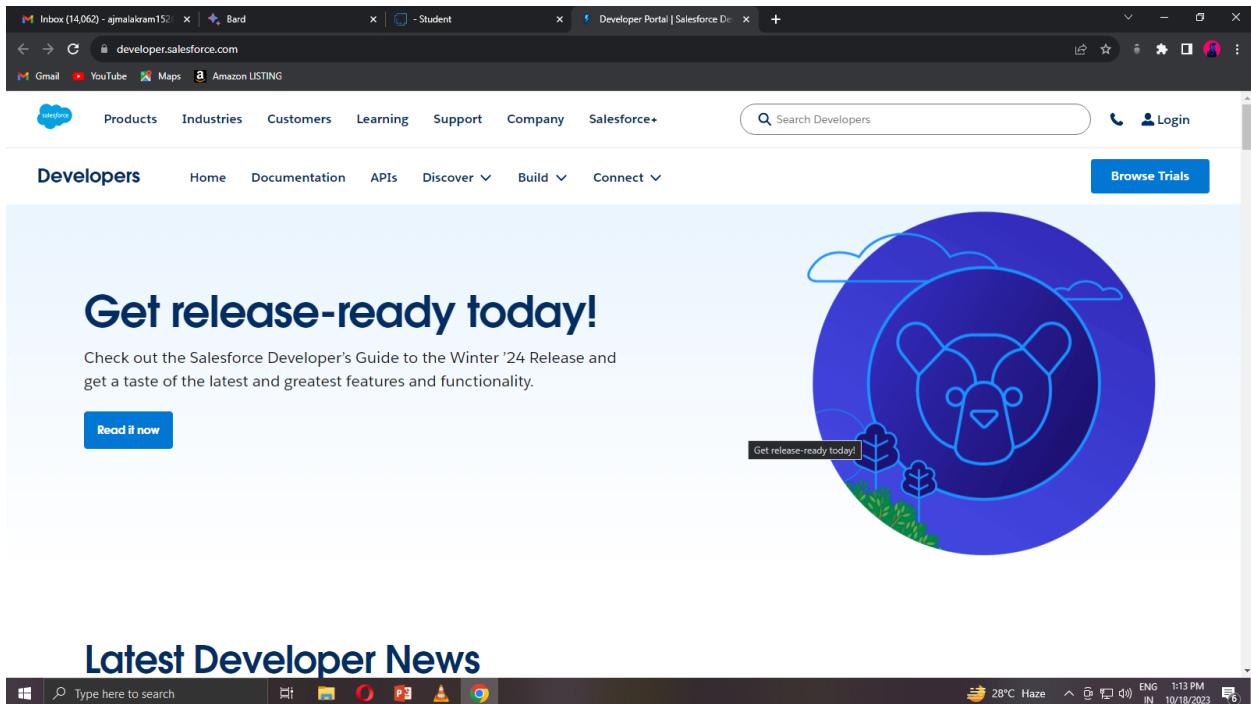


# CHAPTER-2

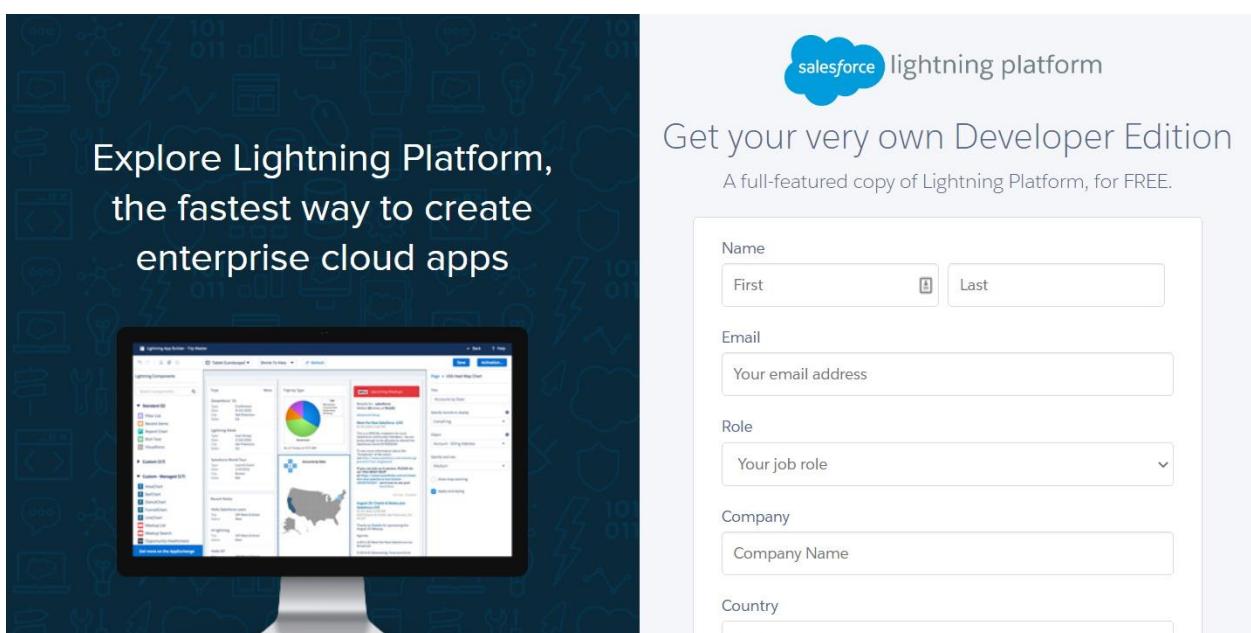
## PREPARATION DATA MODELING

### 2.1 Salesforce Developer Org

In Salesforce, a Developer Sign Up or Developer Edition is a special type of Salesforce environment that is primarily used for development, testing, and learning purposes.



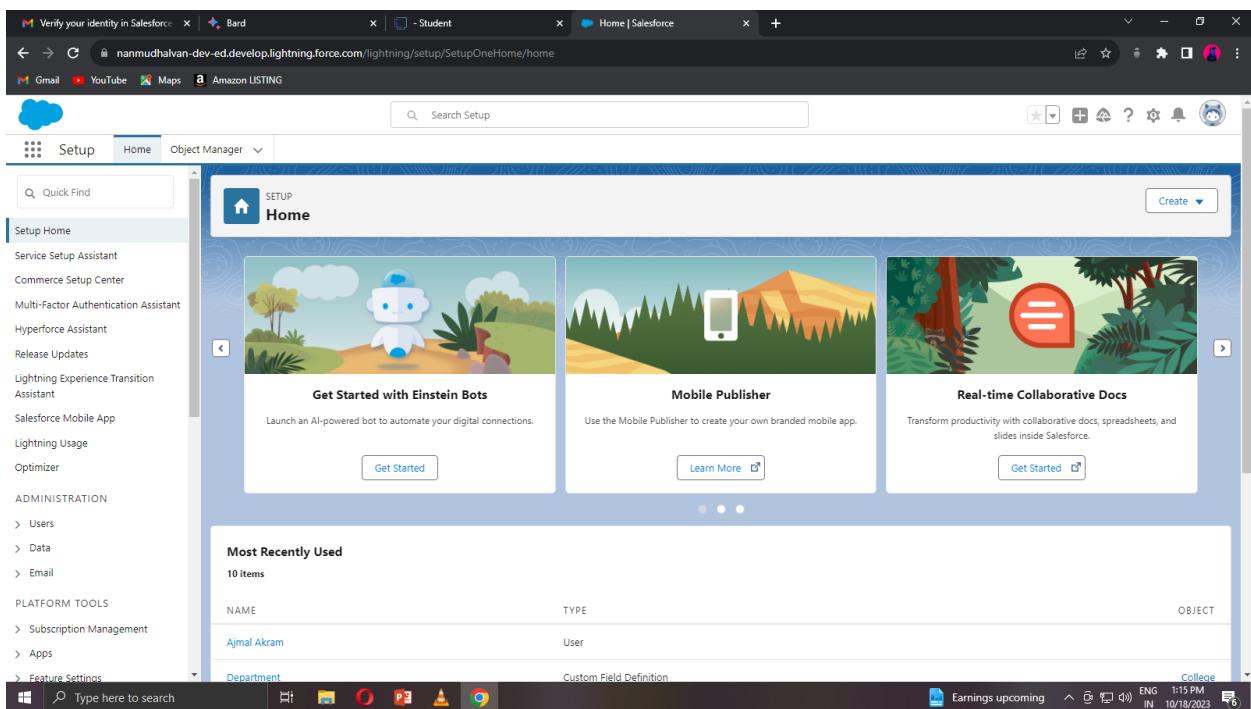
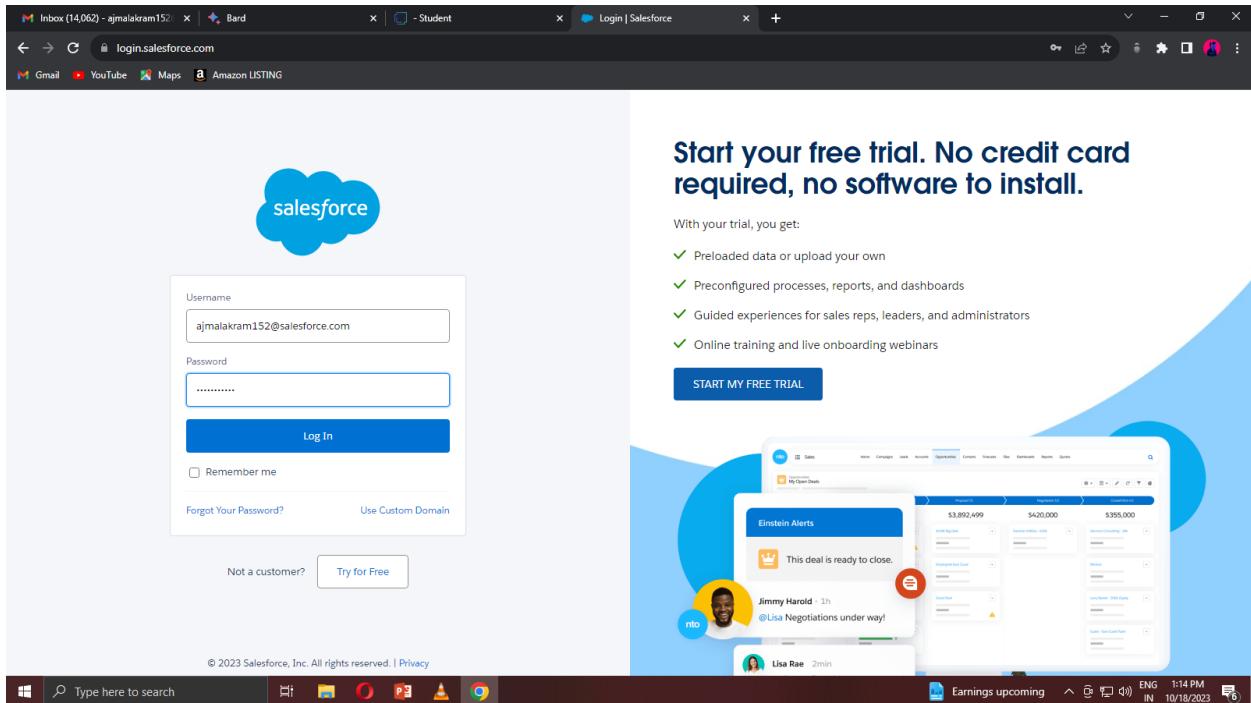
The screenshot shows the Salesforce Developer Portal homepage. At the top, there are tabs for Products, Industries, Customers, Learning, Support, Company, and Salesforce+. A search bar for 'Search Developers' is on the right. Below the navigation, a 'Developers' section includes links for Home, Documentation, APIs, Discover, Build, and Connect. A 'Browse Trials' button is also present. The main content features a large blue circular graphic with a white bear outline and the text 'Get release-ready today!' inside. Below this, there's a section for 'Latest Developer News' with a Windows taskbar at the bottom showing various application icons and system status.



The screenshot shows the Salesforce Lightning Platform landing page. The background features a blue pattern of various icons related to technology and data. On the left, text reads 'Explore Lightning Platform, the fastest way to create enterprise cloud apps'. On the right, there's a large image of a computer monitor displaying the Salesforce developer interface. The main text on the right says 'Get your very own Developer Edition' and 'A full-featured copy of Lightning Platform, for FREE.' Below this are five input fields for 'Name', 'Email', 'Role', 'Company', and 'Country'. The 'Name' field is split into 'First' and 'Last' parts. The 'Email' field contains 'Your email address'. The 'Role' field is a dropdown with 'Your job role'. The 'Company' field contains 'Company Name'. The 'Country' field is a dropdown with 'Country'.

## Account Activation

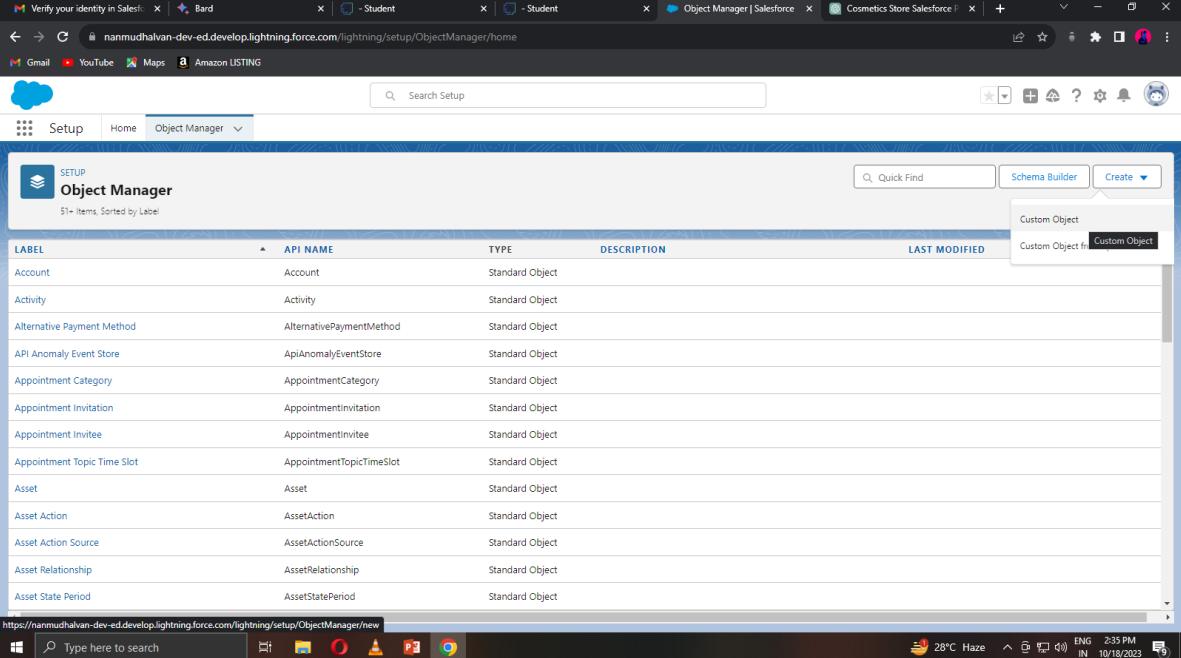
Activation tracks information about devices from which users have verified their identity.



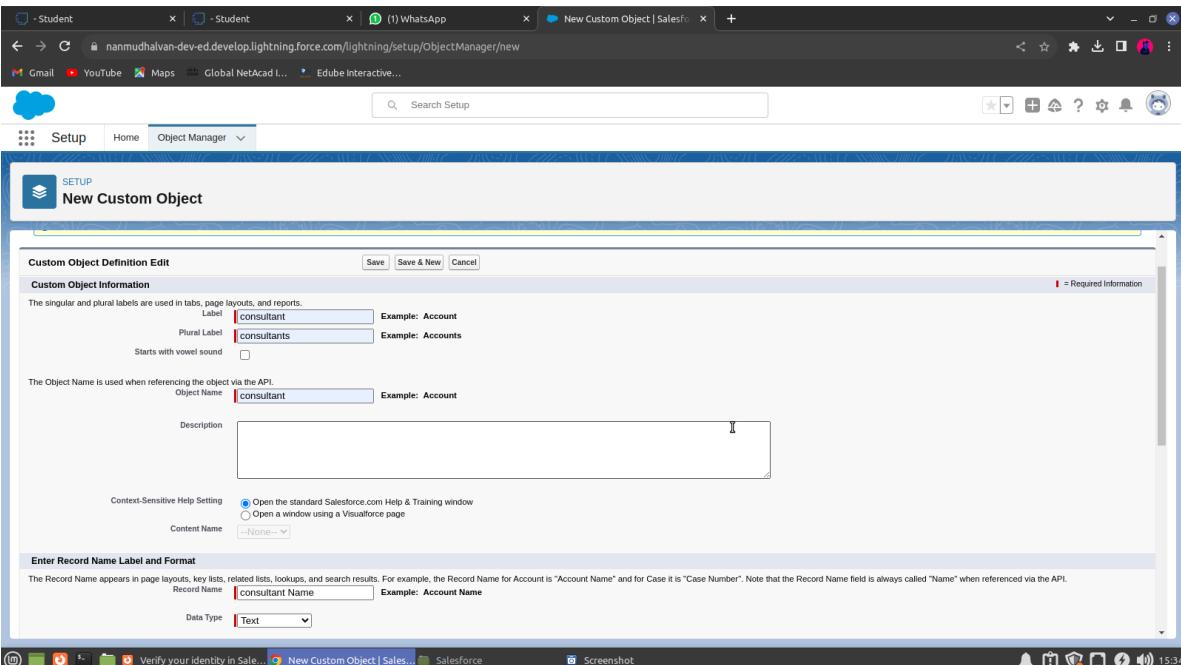
## 2.2 Object Creation

Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc. Custom objects: Our\_Customers, Consultants, Retailers, Others.

### Create the Consultants Object

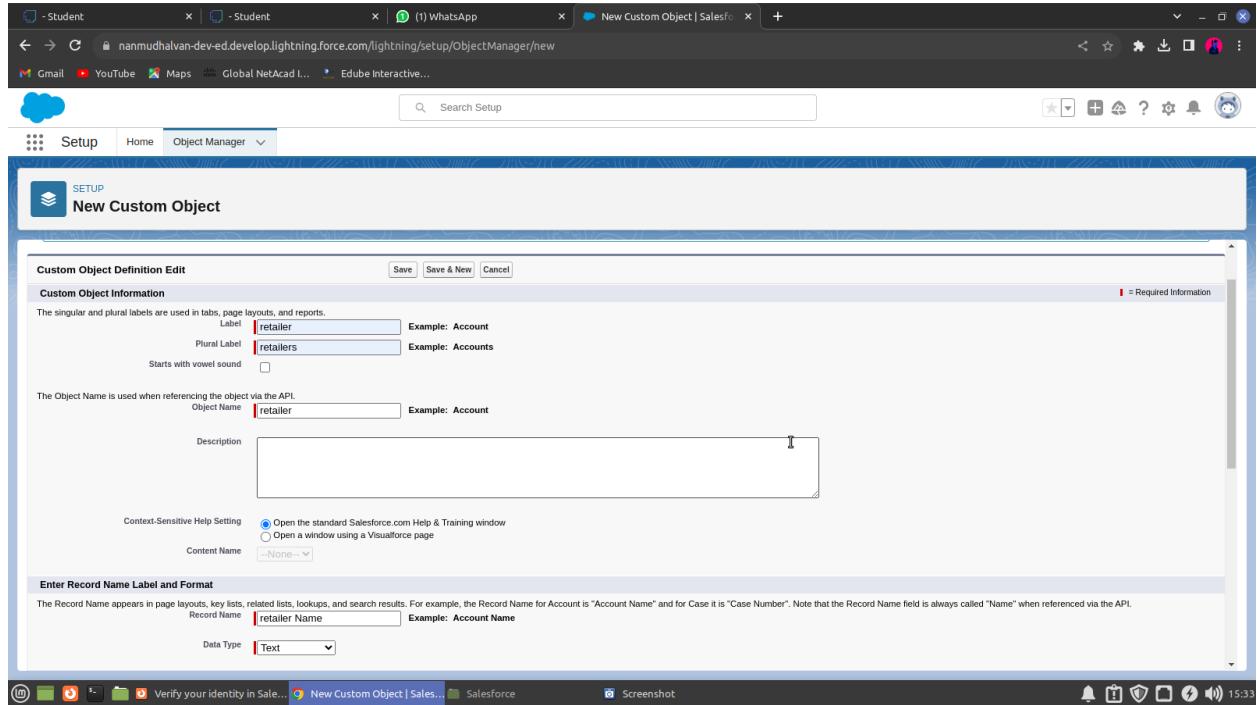


The screenshot shows the Salesforce Object Manager page. The top navigation bar includes links for Setup, Home, and Object Manager. The main content area displays a table of standard objects with columns for Label, API Name, Type, Description, and Last Modified. The table lists 51+ items, sorted by Label. The 'Object Manager' tab is selected. A 'Create' button is visible in the top right corner of the main area. The status bar at the bottom shows the URL as <https://nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager>.

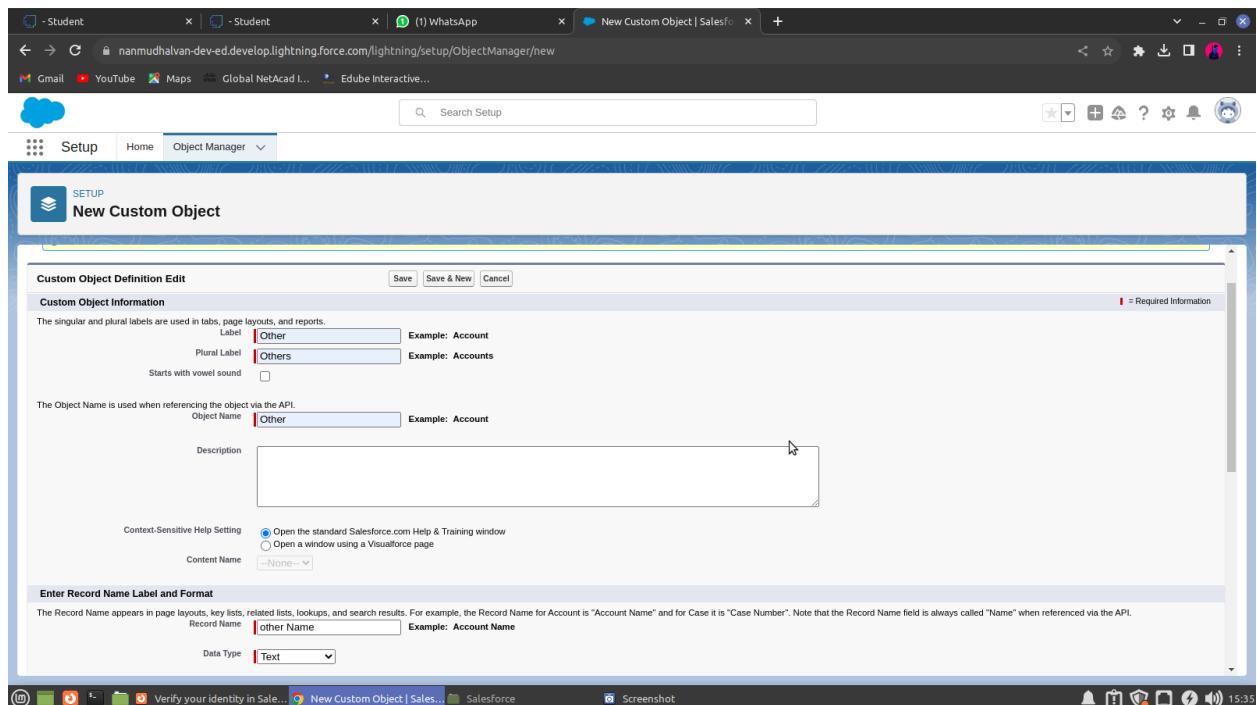


The screenshot shows the 'New Custom Object' page. The top navigation bar includes links for Setup, Home, and Object Manager. The main content area displays the 'Custom Object Definition Edit' form. The 'Custom Object Information' section includes fields for Label (consultant), Plural Label (consultants), and Object Name (consultant). The 'Description' section is empty. The 'Context-Sensitive Help Setting' section has a radio button selected for 'Open the standard Salesforce.com Help & Training window'. The 'Content Name' dropdown is set to 'None'. The 'Enter Record Name Label and Format' section includes a note about Record Name appearing in page layouts, related lists, lookups, and search results. The 'Record Name' field is set to 'consultant Name' and the 'Data Type' is set to 'Text'. The status bar at the bottom shows the URL as <https://nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new>.

## Create the Retailers Object



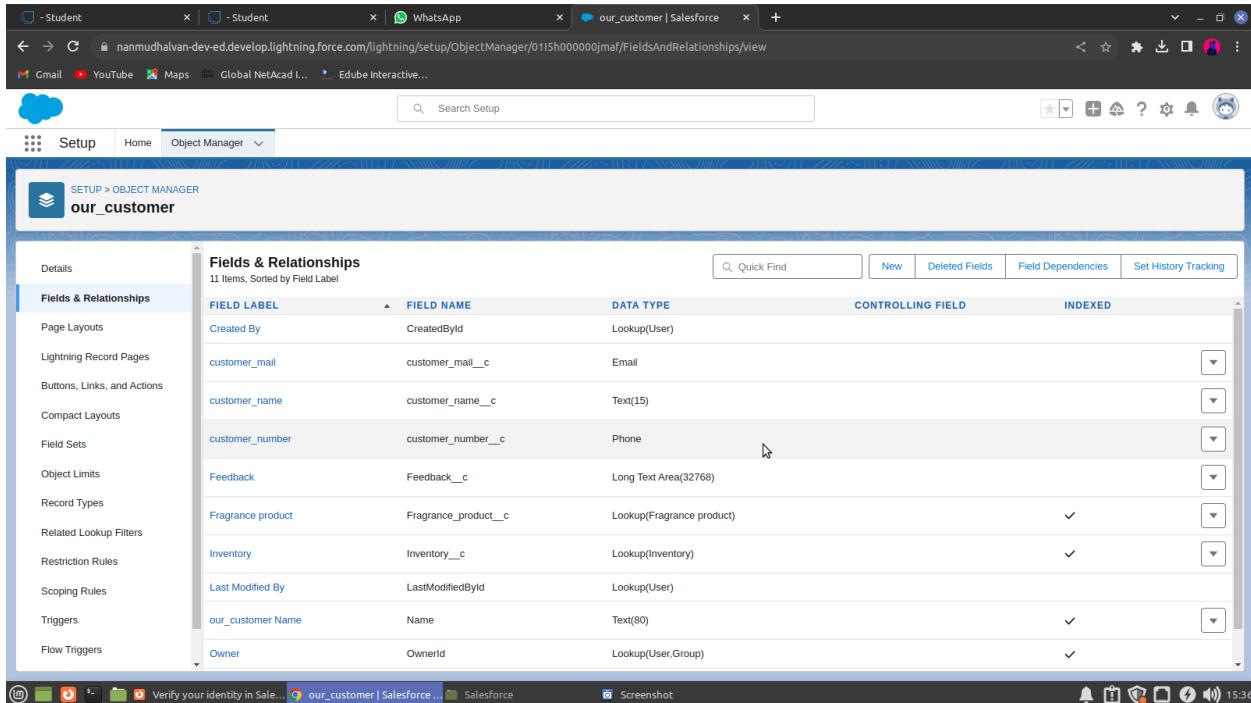
## Create the Others Object



## 2.3 Fields and Relationship

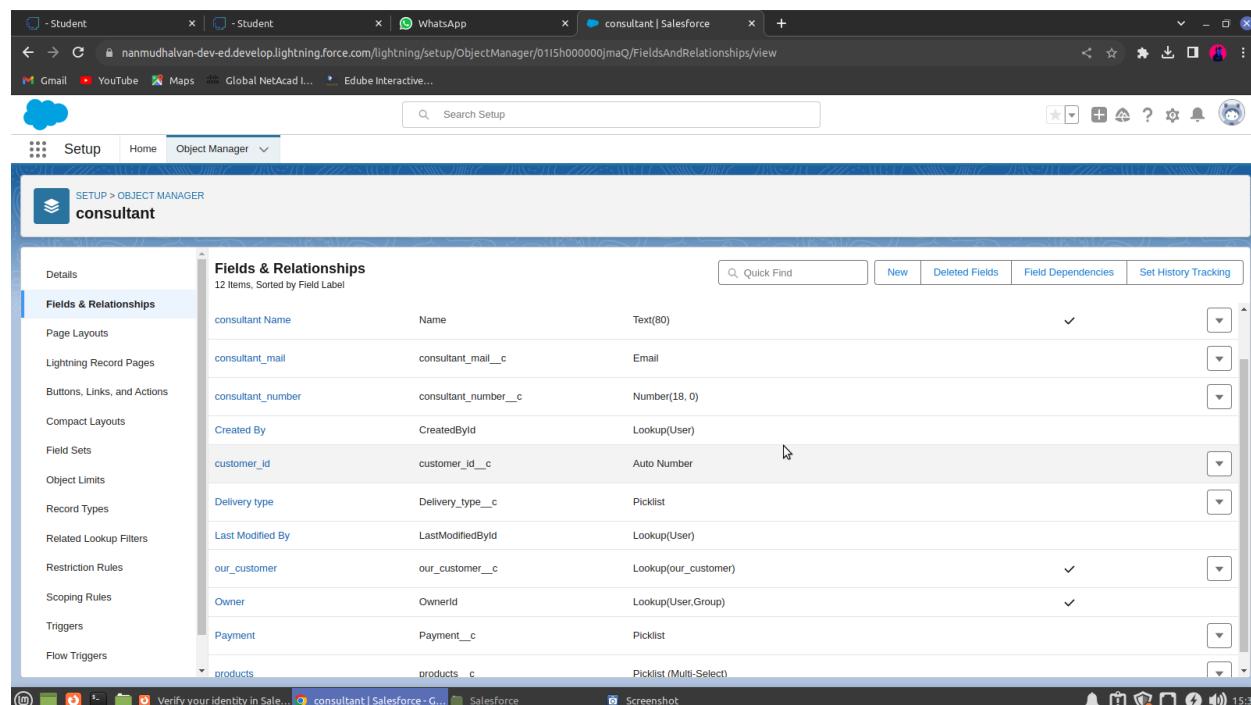
An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

### Fields in Our\_Customers Objects



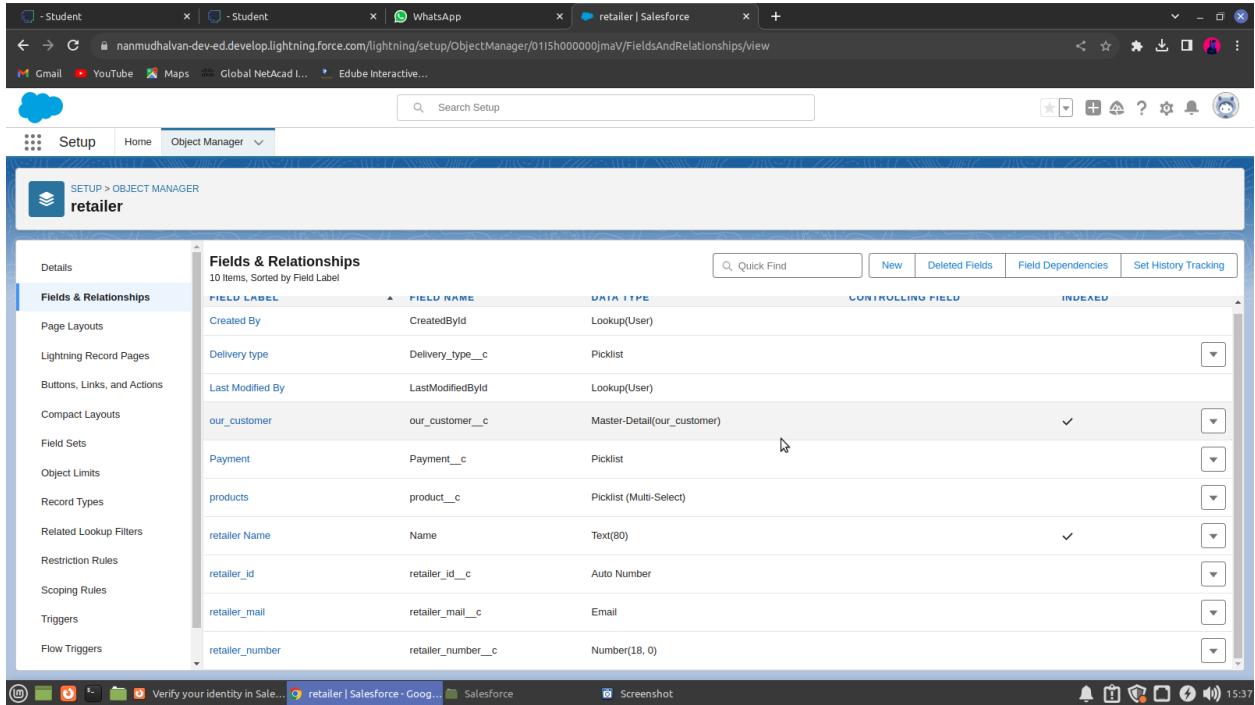
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
customer_mail	customer_mail__c	Email		
customer_name	customer_name__c	Text(15)		
customer_number	customer_number__c	Phone		
Feedback	Feedback__c	Long Text Area(32768)		
Fragrance product	Fragrance_product__c	Lookup(Fragrance product)		
Inventory	Inventory__c	Lookup(Inventory)		
Last Modified By	LastModifiedById	Lookup(User)		
our_customer Name	Name	Text(80)		
Owner	OwnerId	Lookup(User,Group)		

### Fields in Consultants Objects



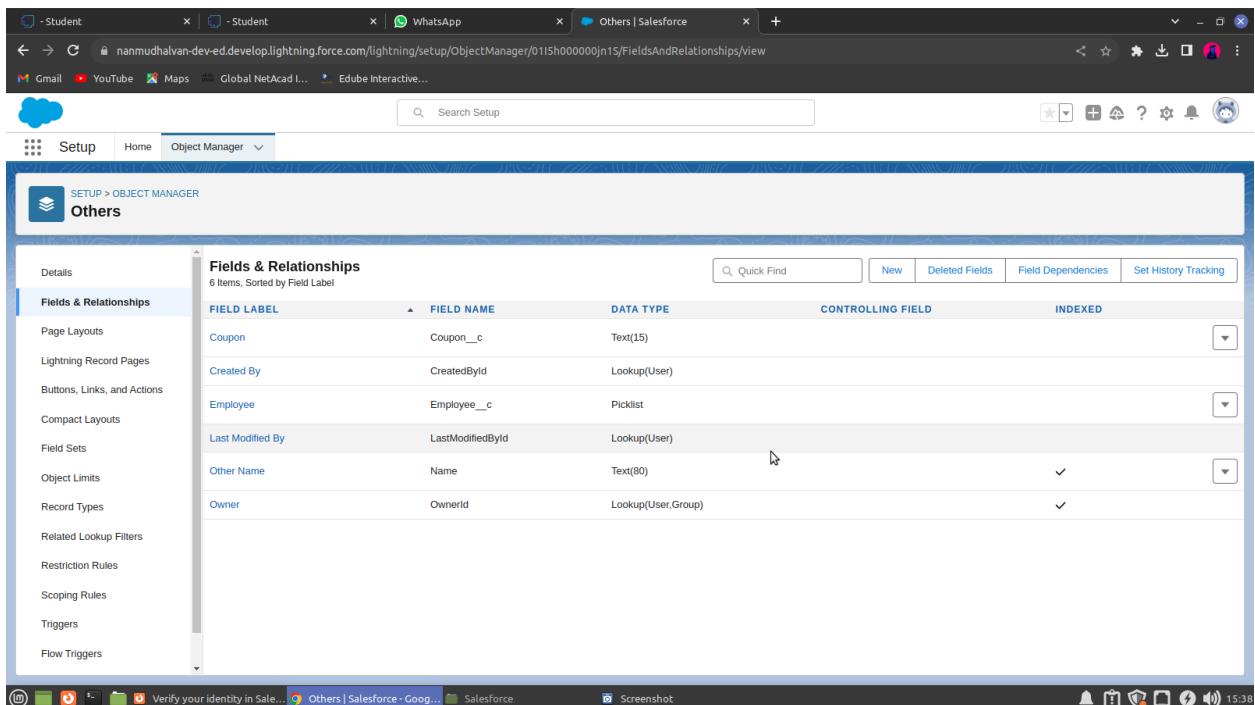
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
consultant Name	Name	Text(80)		
consultant_mail	consultant_mail__c	Email		
consultant_number	consultant_number__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
customer_id	customer_id__c	Auto Number		
Delivery type	Delivery_type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
our_customer	our_customer__c	Lookup(our_customer)		
Owner	OwnerId	Lookup(User,Group)		
Payment	Payment__c	Picklist		
products	products__c	Picklist (Multi-Select)		

## Fields in Retailers Objects



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Delivery type	Delivery_type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
our_customer	our_customer__c	Master-Detail(our_customer)		✓
Payment	Payment__c	Picklist		
products	product__c	Picklist (Multi-Select)		
retailer Name	Name	Text(80)		✓
retailer_id	retailer_id__c	Auto Number		
retailer_mail	retailer_mail__c	Email		
retailer_number	retailer_number__c	Number(18, 0)		

## Fields in Others Objects

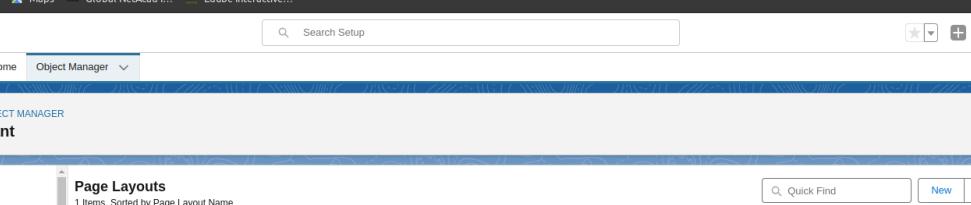


FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Coupon	Coupon__c	Text(15)		
Created By	CreatedById	Lookup(User)		
Employee	Employee__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Other Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓

## 2.4 Page Layouts

In Salesforce, page layouts define the organization and arrangement of fields, buttons, related lists, and other components on an object's detail and edit pages. They allow you to control the user interface and tailor it to meet the specific needs of your organization.

## Select the Consultant Layout page layout



consultant

Page Layouts

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
consultant Layout	Ajmal Akram, 17/10/2023, 10:37 am	Ajmal Akram, 17/10/2023, 11:39 am

consultant Layout

Fields

Section	consultant_number	Delivery type	Payment
Blank Space	consultant_name	Last Modified by	products
Address	Created By	our_customer	
consultant_email	customer_id	Owner	

consultant Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher

Actions in this section are currently inherited from the global publisher layout. You can [override the global publisher layout](#) to set a customized list of actions for the publisher on pages that use this layout.

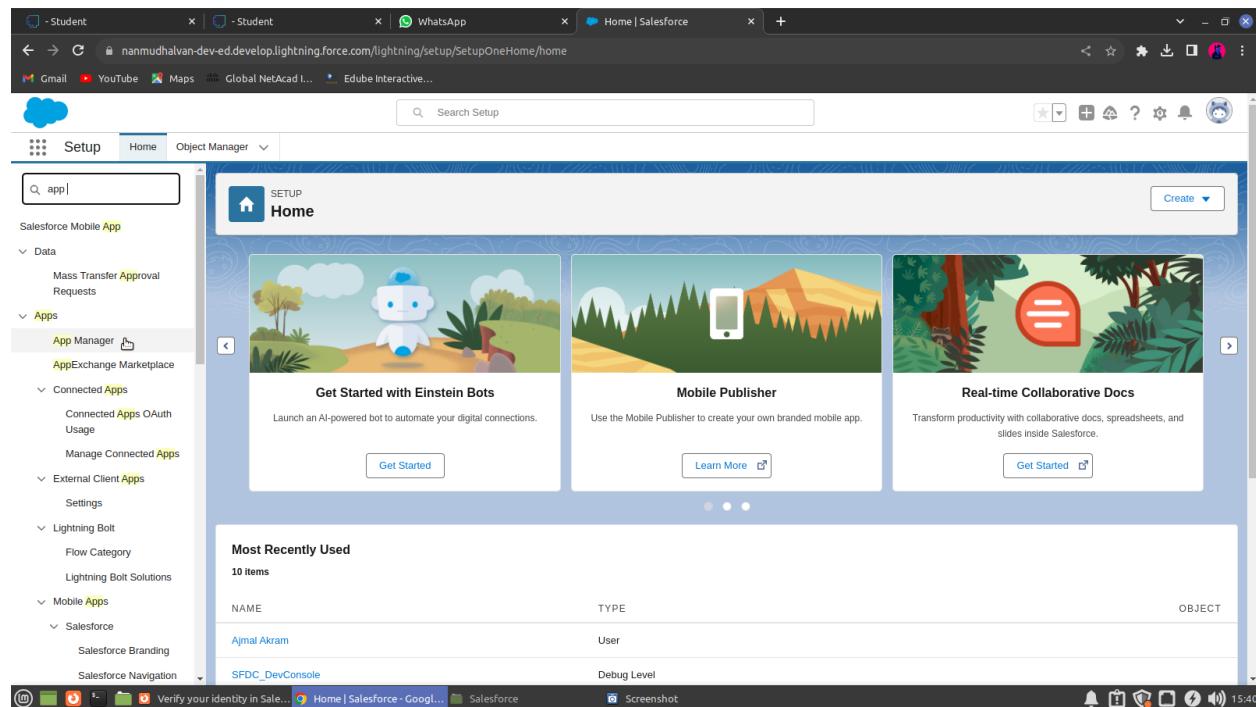
Salesforce Mobile and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

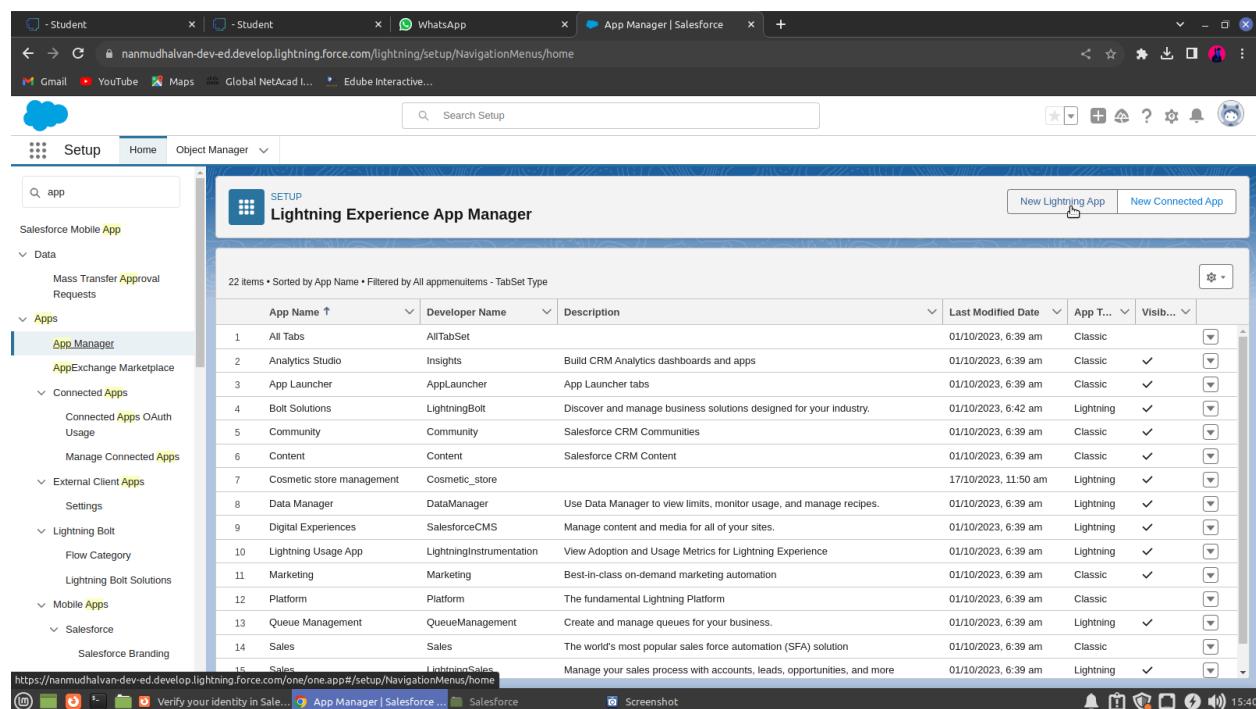
## 2.5 The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom Color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app.

### To create a lightning app page



The screenshot shows the Salesforce Setup Home page. The left sidebar is titled 'Setup' and contains a search bar with 'app' typed in. The 'Apps' section is expanded, showing 'App Manager' (which is selected), 'AppExchange Marketplace', 'Connected Apps', 'External Client Apps', 'Lightning Bolt', and 'Mobile Apps'. Under 'Mobile Apps', 'Salesforce' is expanded, showing 'Salesforce Branding' and 'Salesforce Navigation'. The main content area is titled 'SETUP Home' and features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these cards is a section titled 'Most Recently Used' with a table showing 'Ajmal Akram' (User) and 'SFDC\_DevConsole' (Debug Level). The bottom of the page shows the standard Salesforce navigation bar with links for 'Student', 'WhatsApp', and 'Home | Salesforce'.



The screenshot shows the 'Lightning Experience App Manager' page. The left sidebar is identical to the previous screenshot. The main content area is titled 'Lightning Experience App Manager' and shows a table of 22 items. The table has columns for 'App Name', 'Developer Name', 'Description', 'Last Modified Date', 'App T...', and 'Visib...'. The table lists various apps like 'All Tabs', 'Analytics Studio', 'App Launcher', etc. At the top right of the table, there are buttons for 'New Lightning App' and 'New Connected App'. The bottom of the page shows the standard Salesforce navigation bar with links for 'Student', 'WhatsApp', and 'App Manager | Salesforce'.

Student - Student | WhatsApp | App Manager | Salesforce

nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

New Lightning App

App Details & Branding

App Details

- App Name: Cosmetics Store Management
- Developer Name: cosmetic store
- 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

Next

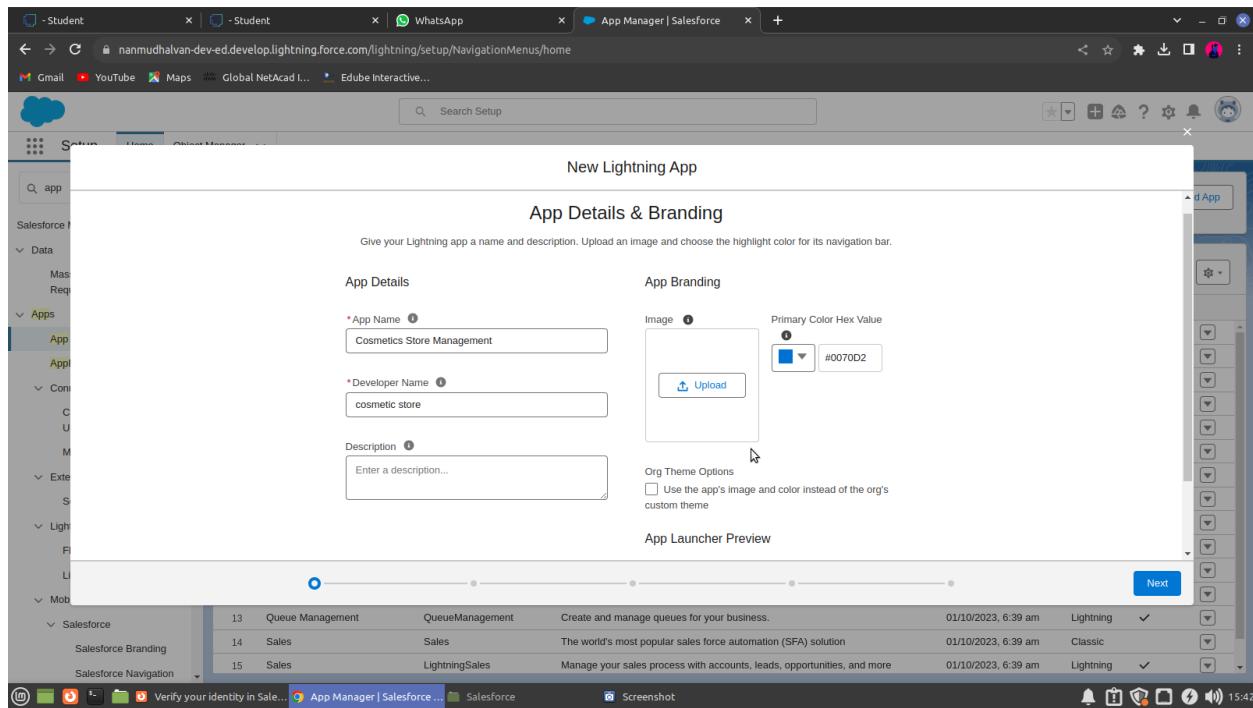
Verify your identity in Sales...

App Manager | Salesforce

Salesforce

Screenshot

15:42



Student - Student | WhatsApp | App Manager | Salesforce

nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

New Lightning App

App Options

Navigation and Form Factor

- Navigation Style: Standard navigation (selected)
- Supported Form Factors: Desktop and phone (selected)

Setup and Personalization

- Setup Experience: Setup (full set of Setup options) (selected)

App Personalization Settings

- Disable end user personalization of nav items in this app
- Disable temporary tabs for items outside of this app

Back

Next

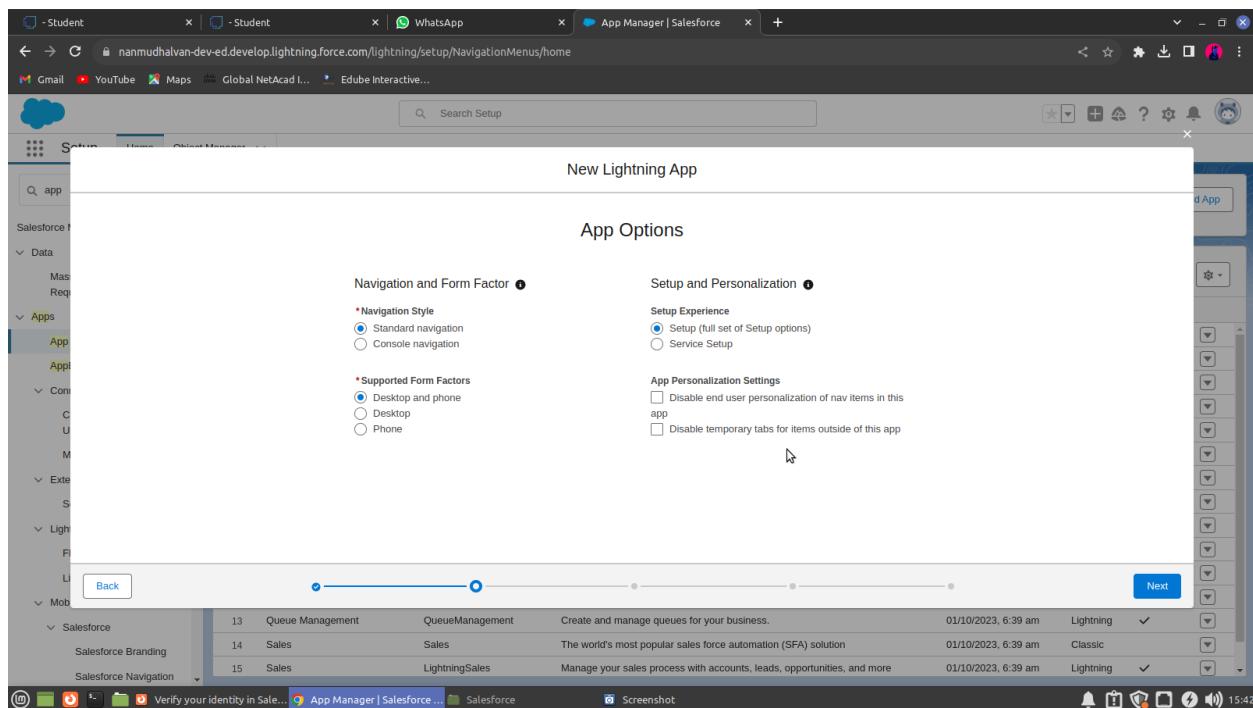
Verify your identity in Sales...

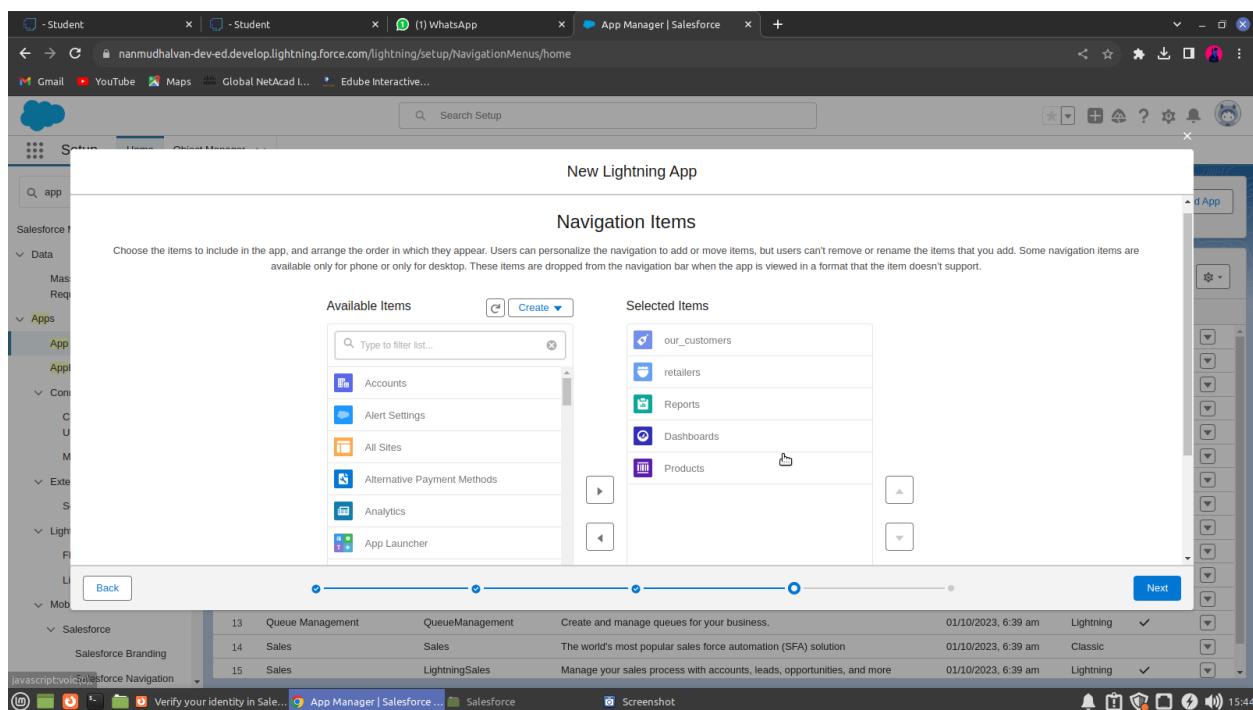
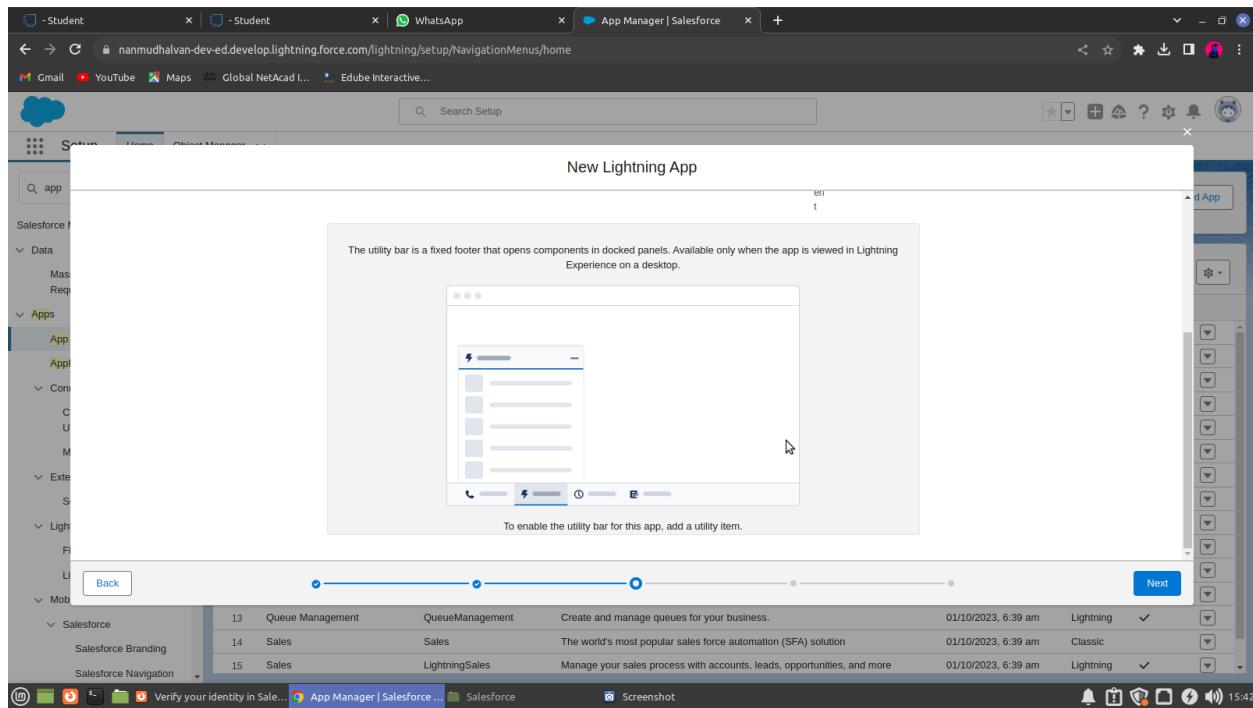
App Manager | Salesforce

Salesforce

Screenshot

15:42





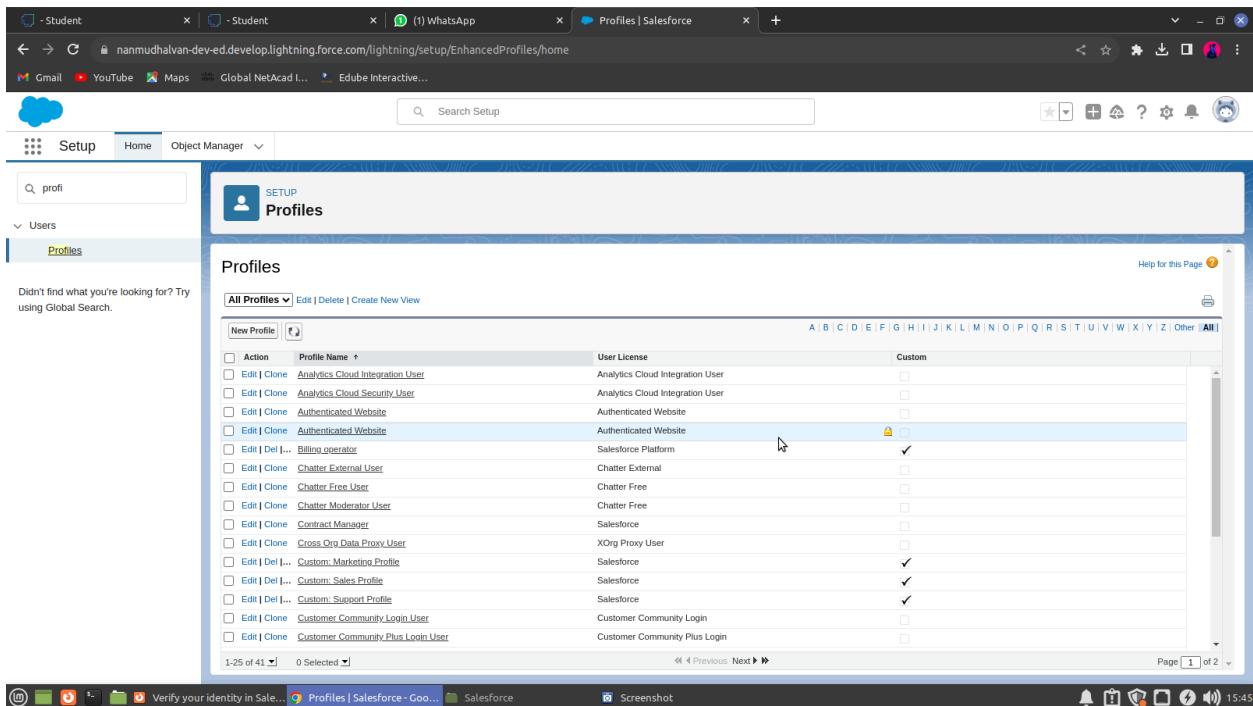
# CHAPTER-3

## USERS & DATA SECURITY

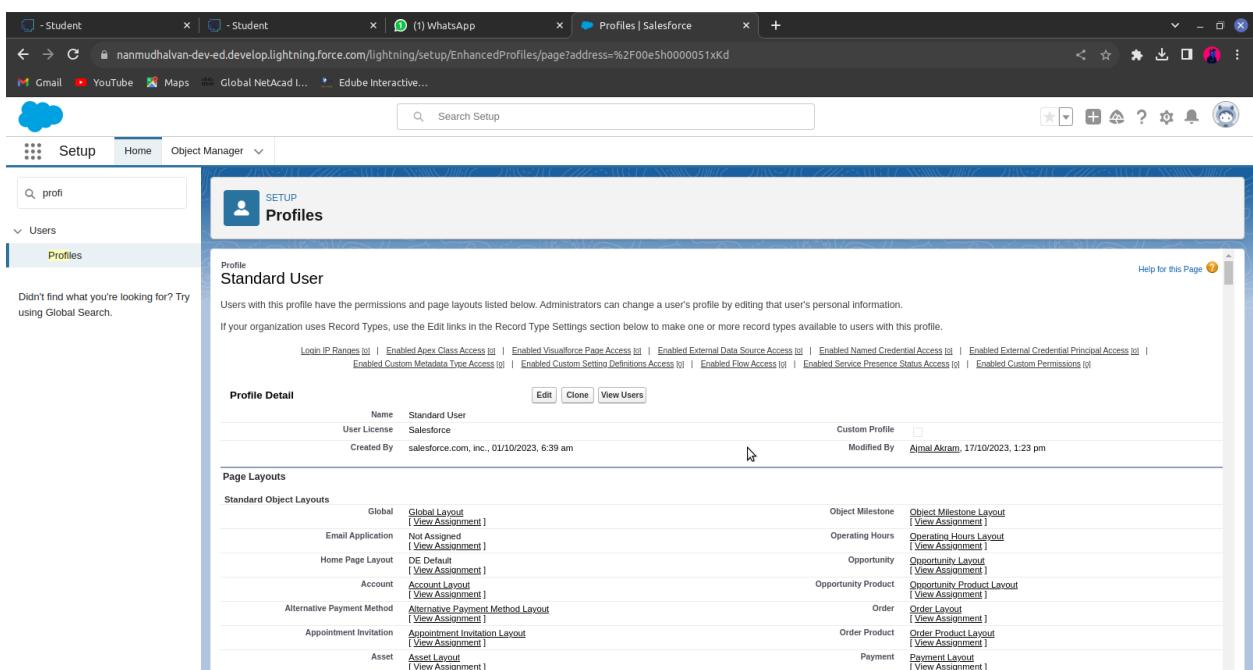
### 3.1 Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

### Creating a Profiles

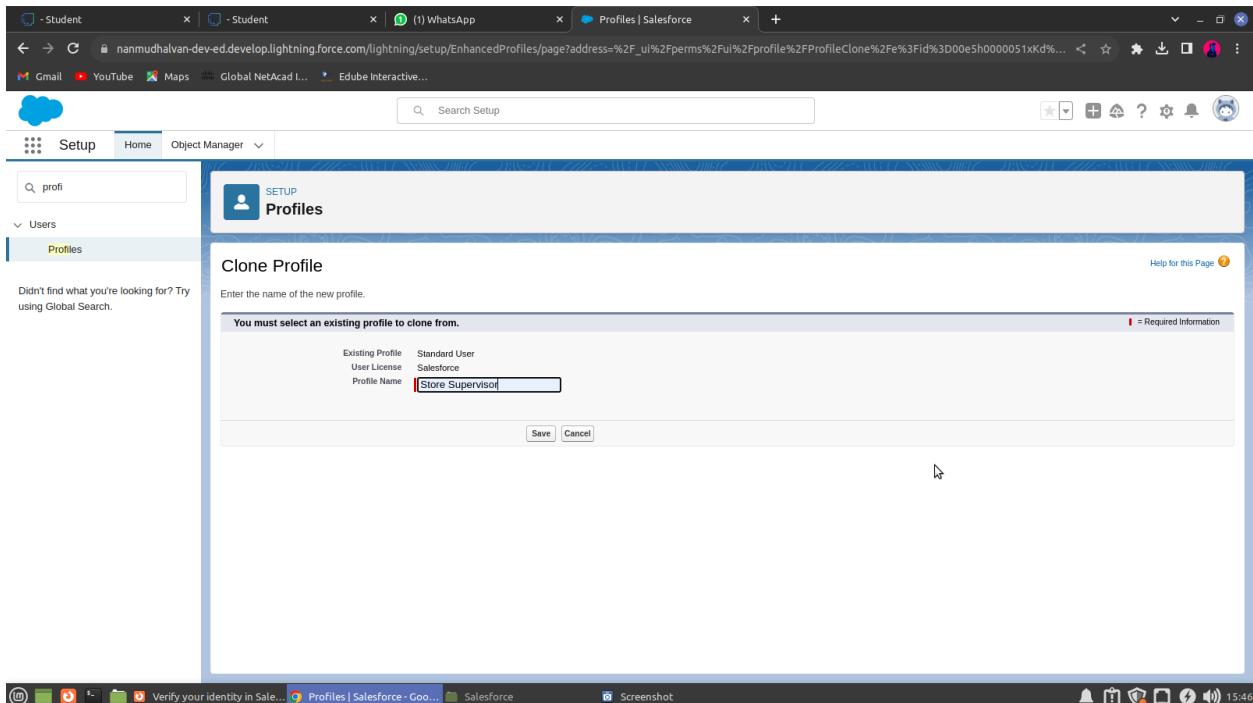


The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The search bar at the top contains 'profi'. The main area displays a table of profiles, with the 'Salesforce Platform' profile selected. The table includes columns for Action, Profile Name, User License, and Custom. The 'Salesforce Platform' row is highlighted with a blue background. The bottom of the page shows a navigation bar with 'Page 1 of 2'.



The screenshot shows the 'Standard User' profile detail page. The profile name is 'Standard User'. The 'Profile Detail' section shows the user license is 'Salesforce'. The 'Page Layouts' section lists various standard object layouts for different objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, and Asset. Each layout is associated with a 'View Assignment' link.

## To create a new profile (Store Supervisor)

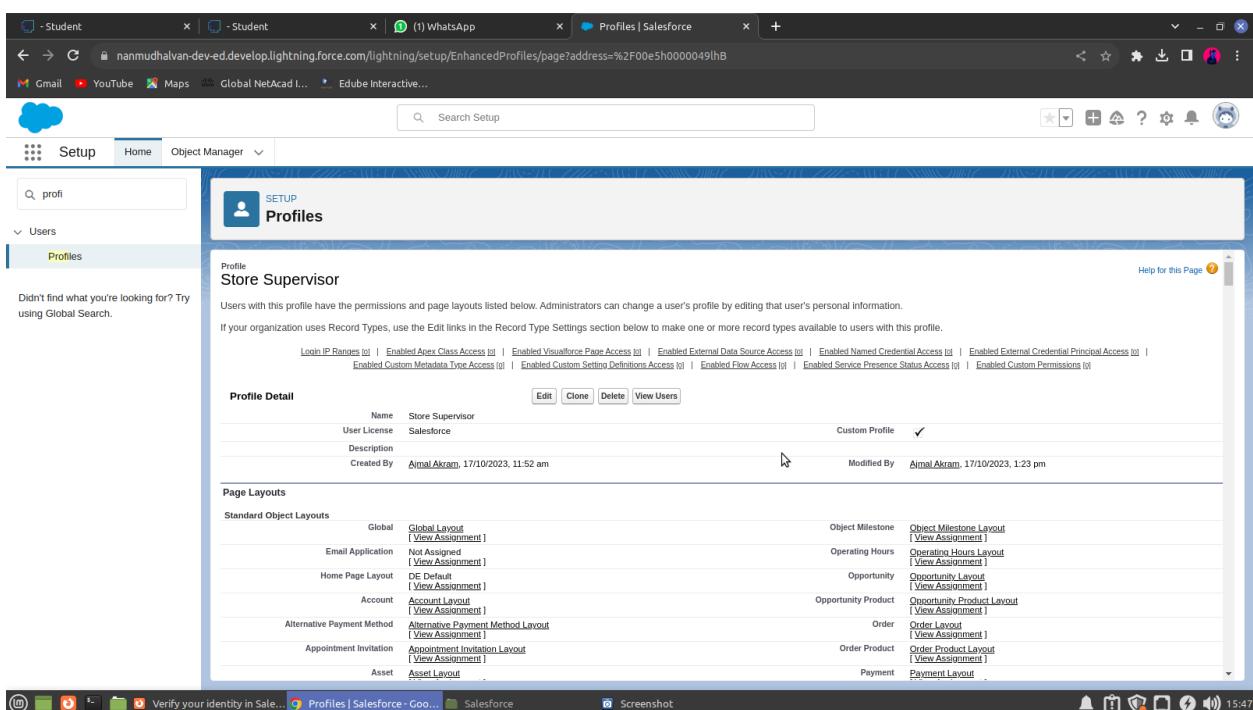


Didn't find what you're looking for? Try using Global Search.

You must select an existing profile to clone from.

Existing Profile Standard User  
User License Salesforce  
Profile Name  \* = Required Information

Save Cancel



Profile **Store Supervisor** Help for this Page \*

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) [Enabled Apex Class Access](#) [Enabled Visualforce Page Access](#) [Enabled External Data Source Access](#) [Enabled Named Credential Access](#) [Enabled External Credential Principal Access](#) [Enabled Custom Metadata Type Access](#) [Enabled Custom Setting Definition Access](#) [Enabled Flow Access](#) [Enabled Service Presence Status Access](#) [Enabled Custom Permissions](#)

**Profile Detail**

Name	Store Supervisor
User License	Salesforce
Description	
Created By	Aimal Akram, 17/10/2023, 11:52 am
Modified By	Aimal Akram, 17/10/2023, 1:23 pm

**Page Layouts**

Standard Object Layouts	Global	Object Milestone
Email Application	Global Layout <a href="#">[View Assignment]</a>	Object Milestone Layout <a href="#">[View Assignment]</a>
Home Page Layout	Non Assigned <a href="#">[View Assignment]</a>	Operating Hours Layout <a href="#">[View Assignment]</a>
Account	DE Default <a href="#">[View Assignment]</a>	Opportunity Layout <a href="#">[View Assignment]</a>
Alternative Payment Method	Account Layout <a href="#">[View Assignment]</a>	Opportunity Product Layout <a href="#">[View Assignment]</a>
Appointment Invitation	Alternative Payment Method Layout <a href="#">[View Assignment]</a>	Order Layout <a href="#">[View Assignment]</a>
Asset	Appointment Invitation Layout <a href="#">[View Assignment]</a>	Order Product Layout <a href="#">[View Assignment]</a>
	Asset Layout <a href="#">[View Assignment]</a>	Payment Layout <a href="#">[View Assignment]</a>

Student - Student - WhatsApp - Profiles | Salesforce

nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5h0000049lhB%2Fe%3FretURL%3D%252F00e5h0000049lhB%253FappLayout%...

Gmail YouTube Maps Global NetAcad... Edube Interactive...

Cloud Setup Home Object Manager

Search Setup

Profile Edit

Name: Store Supervisor

User License: Salesforce

Custom Profile: ✓

Custom App Settings

	Visible	Default		Visible	Default
All Tabs (standard_AlTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard_LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard_Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard_Sales)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard_AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard_LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard_LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard_Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard_Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard_LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Content (standard_Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard_ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Cosmetic store management (Cosmetic_store)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard_Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Data Manager (standard_DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service Console (standard_LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>
Digital Experiences (standard_DigitalExperiences)	<input checked="" type="checkbox"/>	<input type="radio"/>	Site.com (standard_Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>
Lightning Usage App (standard_LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="radio"/>	Subscription Management (standard_RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Marketing (standard_Marketing)	<input type="checkbox"/>	<input type="radio"/>	WPI (standard_Work)	<input checked="" type="checkbox"/>	<input type="radio"/>

Required Information: ✓

Verify your identity in Sales... Profiles | Salesforce - Goo... Salesforce Screenshot 15:48

Student - Student - WhatsApp - Profiles | Salesforce

nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5h0000049lhB%2Fe%3FretURL%3D%252F00e5h0000049lhB%253FappLayout%...

Gmail YouTube Maps Global NetAcad... Edube Interactive...

Cloud Setup Home Object Manager

Search Setup

Profile Edit

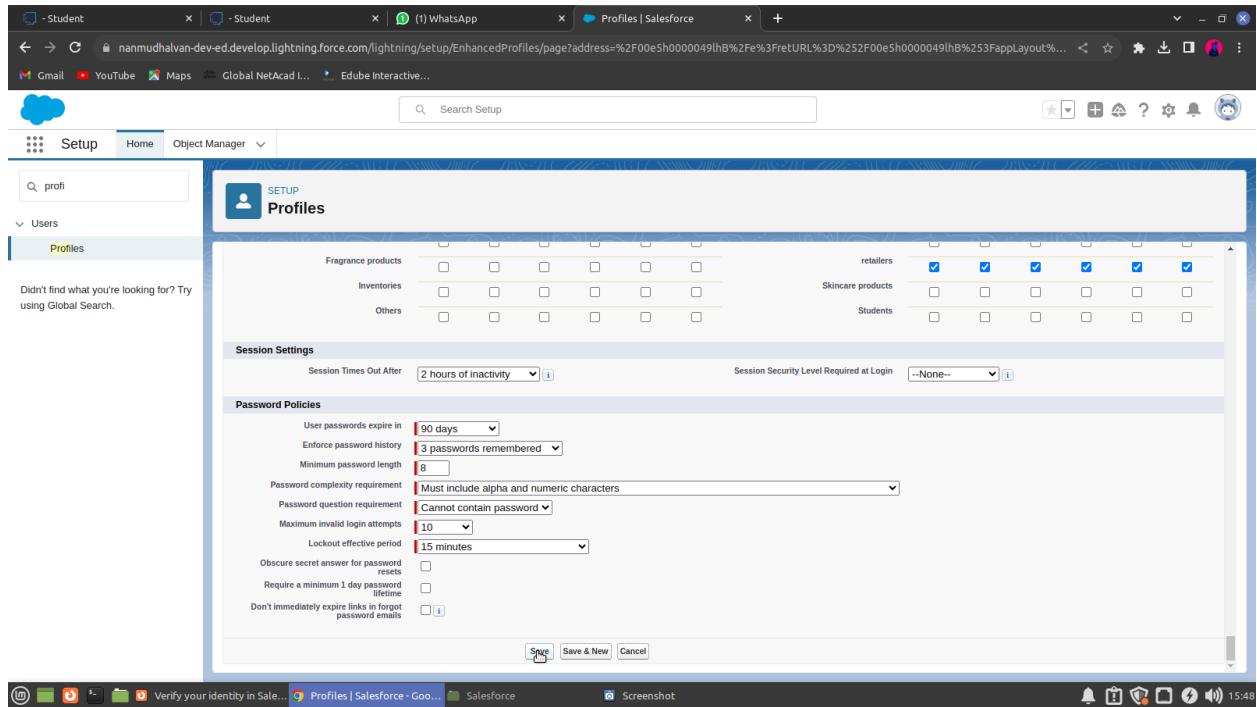
Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
consultants	<input checked="" type="checkbox"/>					
Favourites	<input checked="" type="checkbox"/>					
Fragrance products	<input type="checkbox"/>					
Inventories	<input type="checkbox"/>					
Others	<input type="checkbox"/>					

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
our_customers	<input checked="" type="checkbox"/>					
Properties	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
retailers	<input checked="" type="checkbox"/>					
Skincare products	<input type="checkbox"/>					
Students	<input type="checkbox"/>					

Session Settings

Verify your identity in Sales... Profiles | Salesforce - Goo... Salesforce Screenshot 15:48



Profiles

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

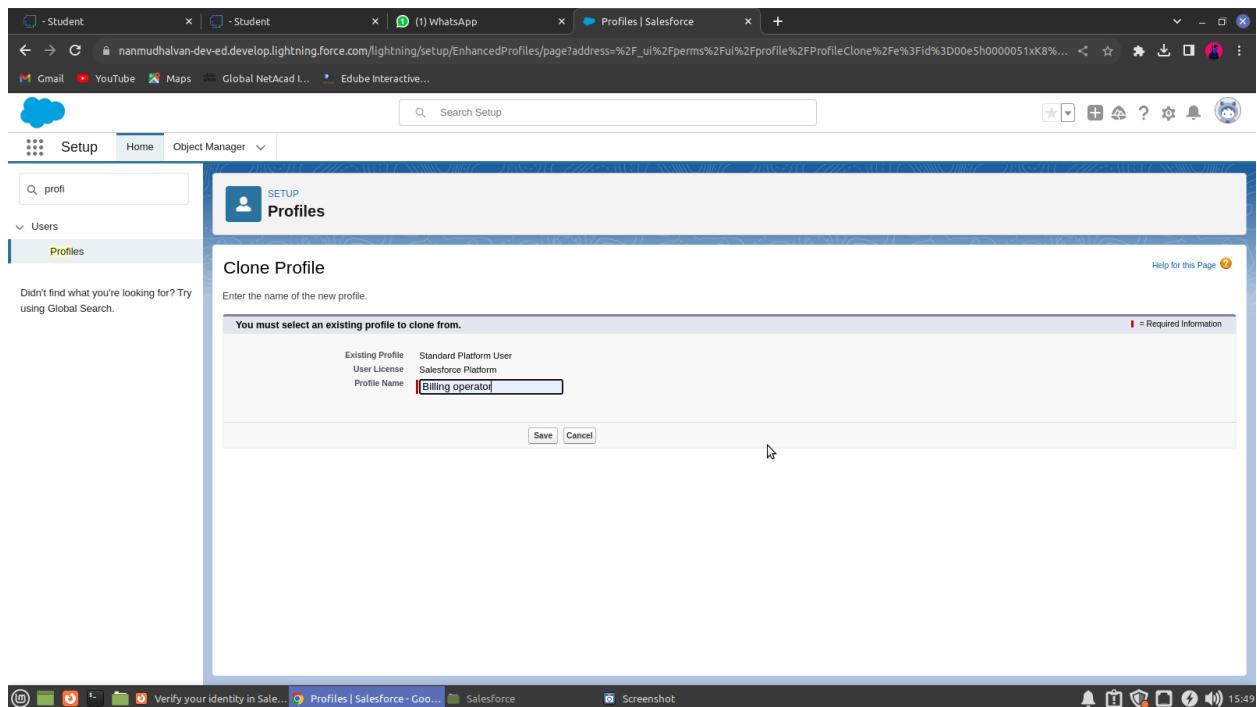
Obscure secret answer for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

Save Save & New Cancel

## To create a new profile (Billing Operator)



Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard Platform User
User License	Salesforce Platform
Profile Name	Billing operator

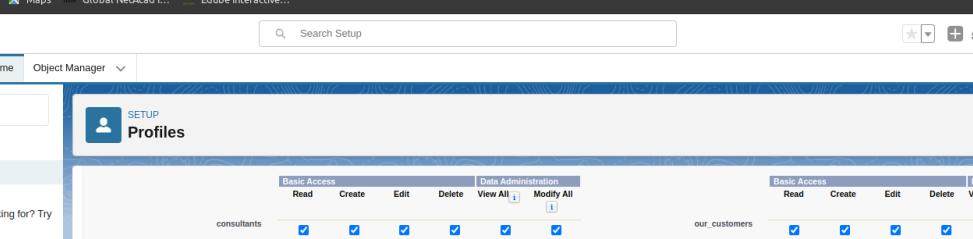
Save Cancel

The screenshot shows the Salesforce Setup interface with the following details:

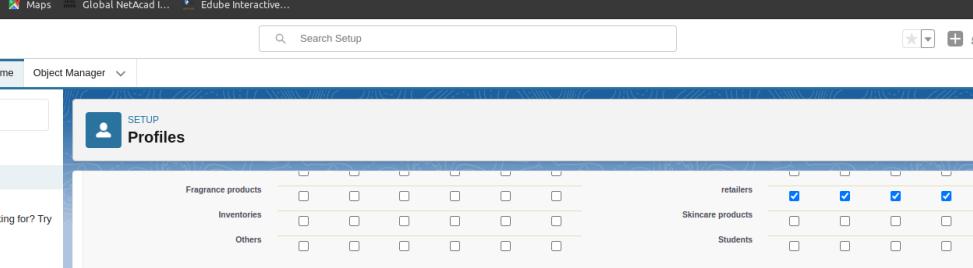
- Page:** Profiles | Salesforce
- Section:** Profiles
- Profile:** Billing operator
- Profile Detail:**
  - Name: Billing operator
  - User License: Salesforce Platform
  - Description: (empty)
  - Created By: Aimal Akram, 17/10/2023, 11:57 am
  - Modified By: Aimal Akram, 17/10/2023, 1:23 pm
- Page Layouts:** A table showing standard object layouts for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, and Asset.
- Help:** Help for this Page

The screenshot shows the Salesforce Setup interface with the following details:

- Page:** Profiles | Salesforce
- Section:** Profiles
- Profile:** Billing operator
- Profile Edit:**
  - Profile Edit:** Set the permissions and page layouts for this profile.
  - Profile Details:**
    - Name: Billing operator
    - User License: Salesforce Platform
    - Description: (empty)
  - Custom App Settings:** A table showing app settings for Analytics Studio, App Launcher, and Cosmetic store management.
  - Service Provider Access:** A table showing access for Tab Settings and Standard Tab Settings.
  - Help:** Help for this Page



The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The top navigation bar includes tabs for 'Student', 'Student', '(1) WhatsApp', 'Profiles | Salesforce', and a '+' button. The main header has a blue cloud icon, the word 'Setup', and a search bar with the placeholder 'Search Setup'. Below the header, there are tabs for 'Home' and 'Object Manager'. A sidebar on the left shows a search bar with 'profi' typed in, a 'Users' section, and a 'Profiles' section which is currently selected. A message at the bottom of the sidebar says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Profiles' and shows two tables of access rights. The first table is for 'Basic Access' and the second for 'Data Administration'. The objects listed are consultants, Favourites, Fragrance products, Inventories, Others, our\_customers, Properties, retailers, Skincare products, and Students. Each object has rows for Read, Create, Edit, Delete, View All, and Modify All, with checkboxes indicating the level of access. Below these tables are 'Session Settings' and 'Password Policies' sections. The 'Session Settings' section includes 'Session Times Out After' (set to '2 hours of inactivity') and 'Session Security Level Required at Login' (set to 'None'). The 'Password Policies' section contains various configuration options: 'User passwords expire in' (set to '90 days'), 'Enforce password history' (set to '3 passwords remembered'), 'Minimum password length' (set to '8'), 'Password complexity requirement' (set to 'Must include alpha and numeric characters'), 'Password question requirement' (set to 'Cannot contain password'), 'Maximum invalid login attempts' (set to '10'), 'Lockout effective period' (set to '15 minutes'), and 'Obfuscate secret answer for password resets' (unchecked). The bottom of the screen shows the Windows taskbar with various icons and the system tray.

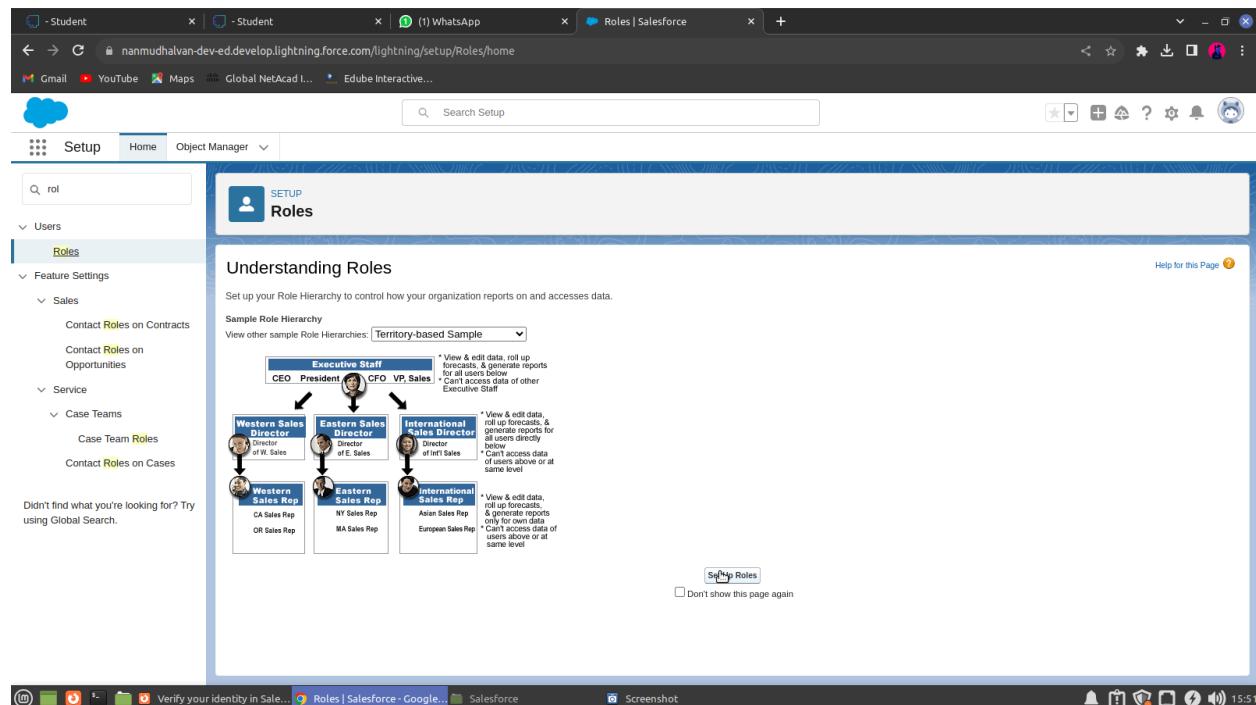


The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The top navigation bar includes tabs for Home, Object Manager, and a search bar. The left sidebar shows a search bar and navigation links for Users and Profiles. A message at the top says, "Didn't find what you're looking for? Try using Global Search." The main content area displays a grid of profiles for different product categories: Fragrance products, Inventories, Others, retailers, Skincare products, and Students. Each category has a row of checkboxes for selecting specific profiles. Below the grid are sections for Session Settings and Password Policies. The Session Settings section includes fields for 'Session Times Out After' (set to '2 hours of inactivity') and 'Session Security Level Required at Login' (set to '--None--'). The Password Policies section includes fields for 'User passwords expire in' (set to '90 days'), 'Enforce password history' (set to '3 passwords remembered'), 'Minimum password length' (set to '8'), 'Password complexity requirement' (set to 'Must include alpha and numeric characters'), 'Password question requirement' (set to 'Cannot contain password'), 'Maximum invalid login attempts' (set to '10'), and 'Lockout effective period' (set to '15 minutes'). Other password policy options like 'Disclose secret answer for password resets', 'Require a minimum 1 day password lifetime', and 'Don't immediately expire links in forgot password emails' are also listed with checkboxes. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

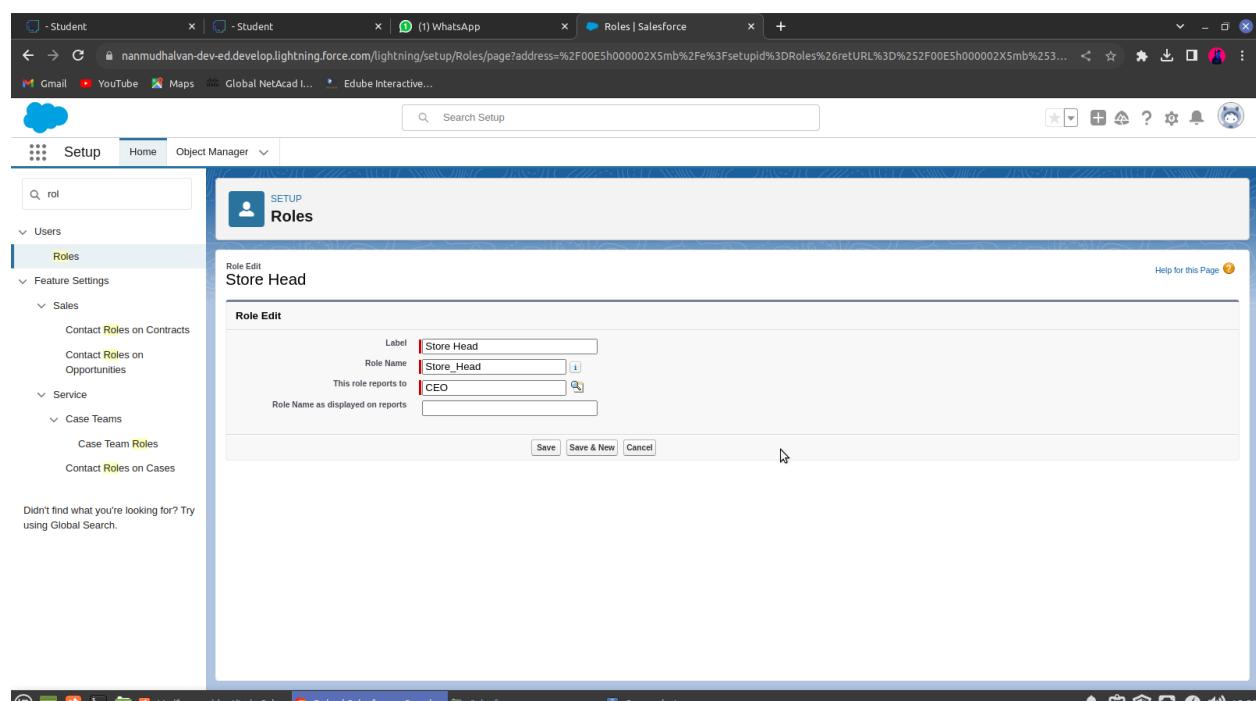
## 3.2 Setup Roles

Salesforce roles are record-level access controls that define what data a user can see in Salesforce.

### Creating a Role



The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The left sidebar shows navigation options like 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main content area is titled 'Understanding Roles' and contains a diagram of a role hierarchy. The hierarchy starts with 'Executive Staff' (CEO, President, CFO, VP, Sales) at the top, which can 'View & edit data, roll up forecasts, & generate reports for all users below' but 'Can't access data of other Executive Staff'. Below them are 'Western Sales Director' (Director of W. Sales), 'Eastern Sales Director' (Director of E. Sales), and 'International Sales Director' (Director of Int'l Sales), each with their own sub-users ('Sales Reps') who have similar permissions. A 'Territory-based Sample' dropdown is shown. A 'Setup Roles' button and a 'Don't show this page again' checkbox are at the bottom.



The screenshot shows the 'Role Edit' page for the 'Store Head' role. The left sidebar is the same as the previous screenshot. The main content area is titled 'Role Edit' and shows the 'Store Head' role details. The 'Label' field is 'Store Head', 'Role Name' is 'Store\_Head', 'This role reports to' is 'CEO', and 'Role Name as displayed on reports' is empty. A 'Role Edit' button is at the top left of the form. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons. The status bar at the bottom shows the time as 15:51.

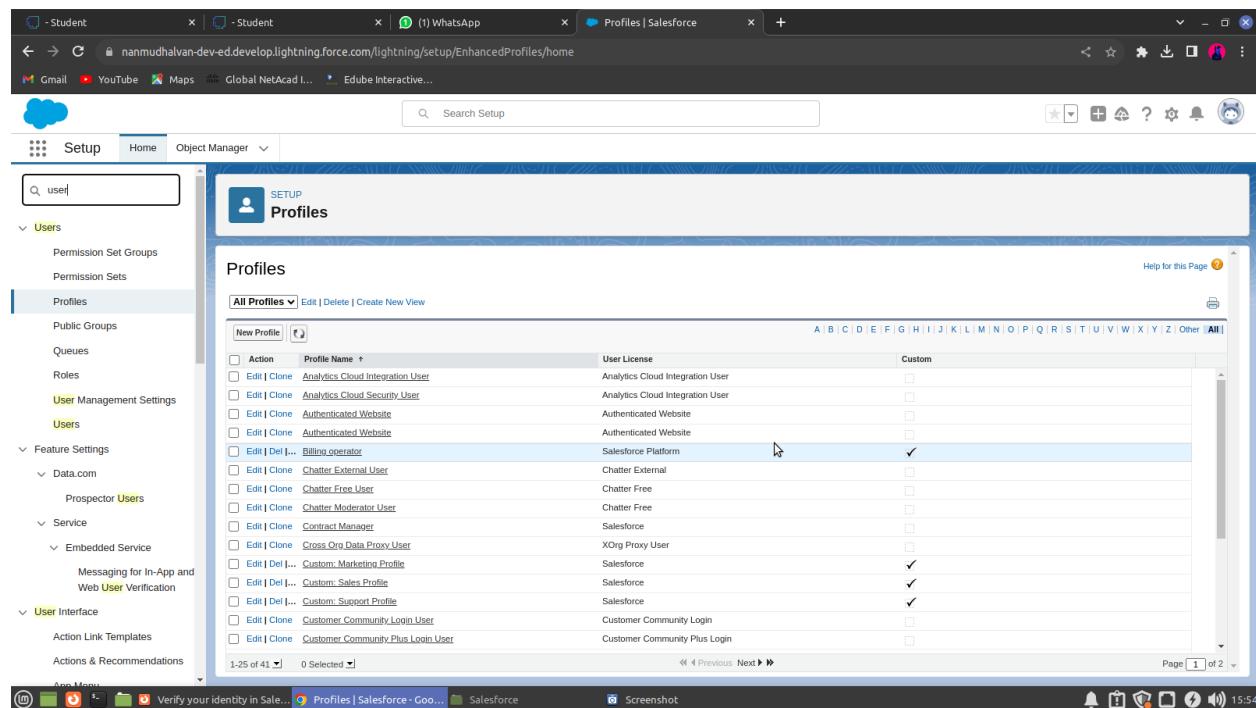
The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. On the left, a sidebar lists 'Sales' and 'Service' sections. The main area displays the 'Role Edit' screen for the 'Billing Operator' role. The 'Label' field is set to 'Billing Operator', the 'Role Name' field is set to 'Billing\_Operator', and the 'This role reports to' field is set to 'Store Head'. The status bar at the bottom shows the URL 'nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/Roles/page?address=%2F00E5h000002X5mg%2Fe%3Fsetupid%3Droles%26retURL%3D%252F00E5h000002X5mg%253...' and the time '15:53'.

The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. On the left, a sidebar lists 'Sales' and 'Service' sections. The main area displays the 'Creating the Role Hierarchy' screen. It shows a tree view of the role hierarchy under 'Your Organization's Role Hierarchy'. The hierarchy includes 'Nan mudhalvan' (parent), 'CEO' (child), 'CFO' (child), 'COO' (child), 'Store Head' (child), 'Billing Operator' (child), 'SVP, Customer Service & Support' (parent), 'Customer Support, International' (child), 'Customer Support, North America' (child), 'Installation & Repair Services' (child), and 'SVP, Human Resources' (parent). The status bar at the bottom shows the URL 'nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/Roles/home' and the time '15:53'.

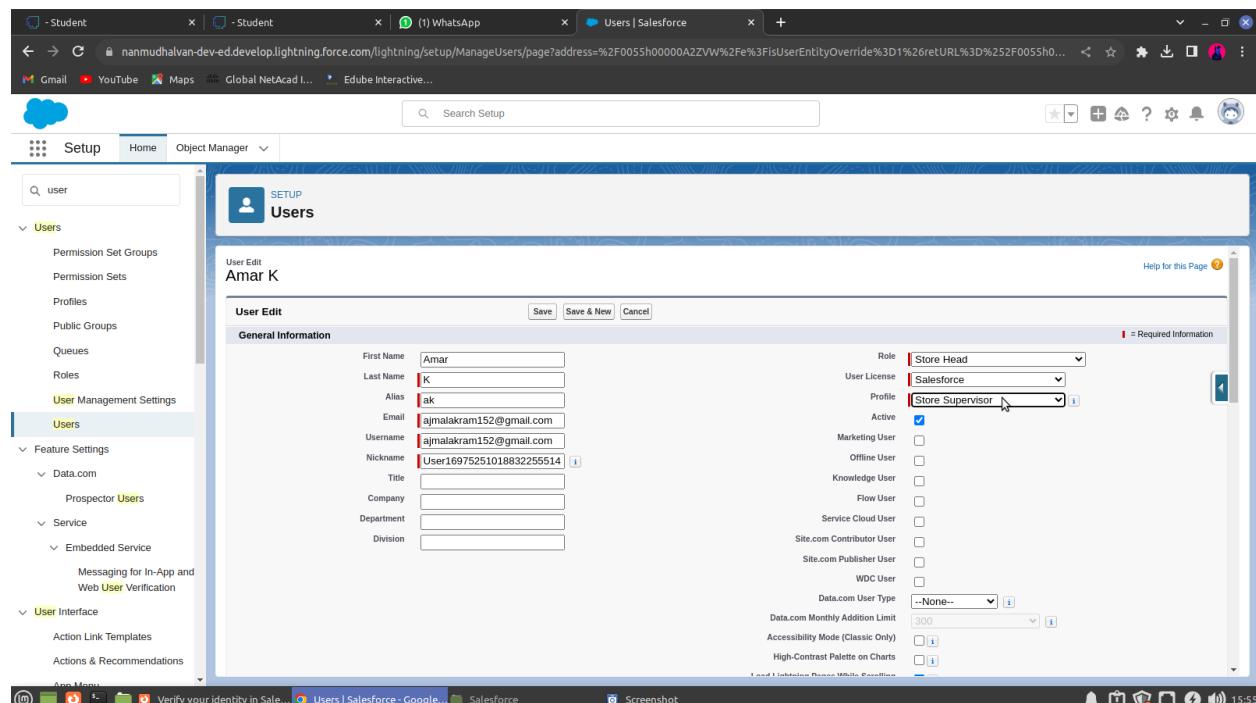
### 3.3 Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

#### Creating A Users

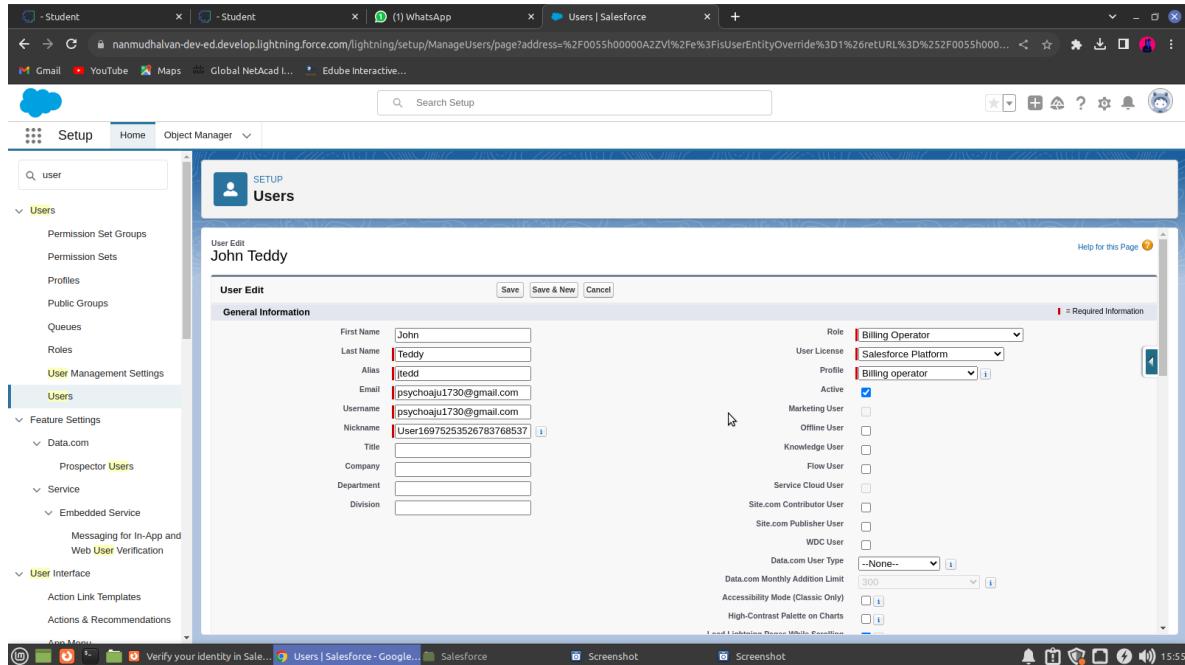


The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing the 'User Management Settings' section with 'Profiles' selected. The main content area is titled 'Profiles' and shows a table of existing profiles. The table includes columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'User License' column contains names like 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', etc. The 'Custom' column has a checked checkbox for the 'Billing Operator' profile. The bottom of the table shows '1-25 of 41' profiles and a 'Page 1 of 2' indicator.



The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing the 'User Management Settings' section with 'Users' selected. The main content area is titled 'Users' and shows a 'User Edit' page for a user named 'Amar K'. The 'General Information' section contains fields for First Name (Amar), Last Name (K), Alias (ak), Email (ajmalakram152@gmail.com), Username (ajmalakram152@gmail.com), Nickname (User1697525101883255514), Title, Company, Department, and Division. To the right of these fields are dropdown menus for 'Role' (Store Head), 'User License' (Salesforce), 'Profile' (Store Supervisor), and 'Active' (checked). Below these are checkboxes for 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', and 'WDC User'. At the bottom of the page are dropdown menus for 'Data.com User Type' (None), 'Data.com Monthly Addition Limit' (300), 'Accessibility Mode (Classic Only)', and 'High-Contrast Palette on Charts'.

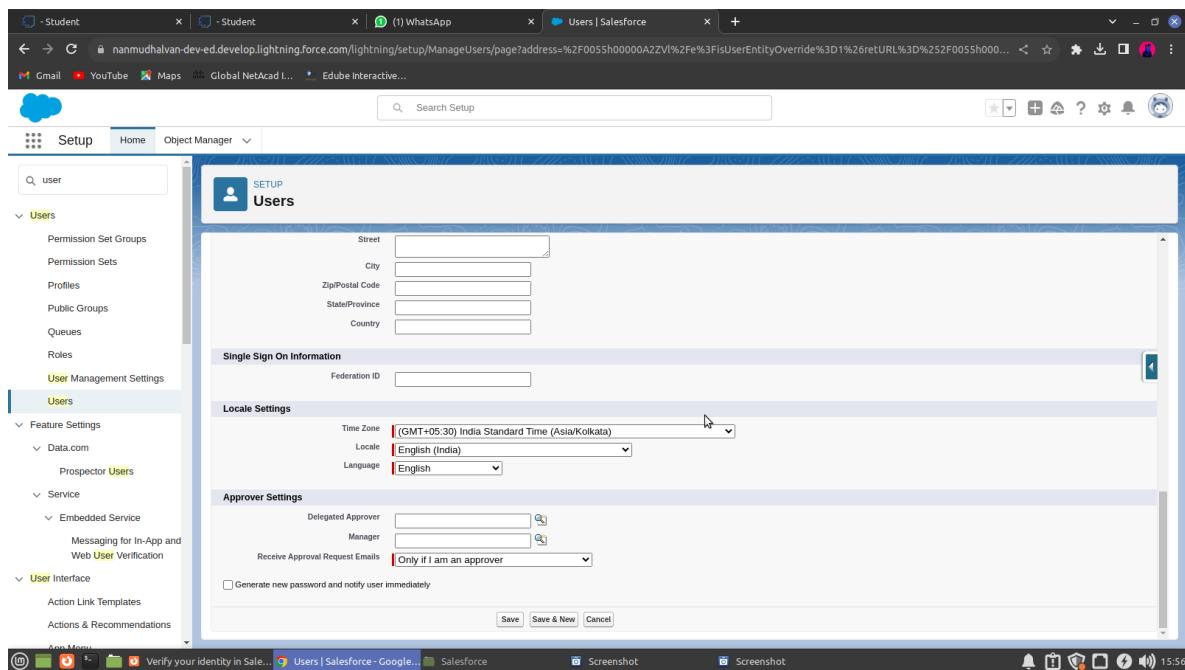
## Creating another Users



The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main window displays the 'User Edit' screen for a user named 'John Teddy'. The 'General Information' section contains the following fields:

Field	Value
First Name	John
Last Name	Teddy
Alias	tedd
Email	psychoaju1730@gmail.com
Username	psychoaju1730@gmail.com
Nickname	User16975253526783768537
Title	
Company	
Department	
Division	

The 'Role' field is set to 'Billing Operator'. Other settings include 'Salesforce Platform' for User License and 'Billing operator' for Profile. The 'Active' checkbox is checked. A large list of user types is visible on the right, with 'Marketing User' and 'Offline User' being the only ones checked.



The screenshot shows the 'User Edit' screen for 'John Teddy' with additional settings visible. The 'Single Sign On Information' section includes fields for Street, City, Zip/Postal Code, State/Province, and Country. The 'Locale Settings' section shows the Time Zone as '(GMT+05:30) India Standard Time (Asia/Kolkata)', Locale as 'English (India)', and Language as 'English'. The 'Approver Settings' section includes fields for Delegated Approver and Manager, and a dropdown for 'Receive Approval Request Emails' set to 'Only if I am an approver'. A checkbox for 'Generate new password and notify user immediately' is also present. The bottom of the screen shows standard Salesforce navigation and status icons.

Setup Home Object Manager

SETUP Users

All Users

On this page you can create, view, and manage users. To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users [Edit](#) [Create New View](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Akram, Amal	Akra	amalakram152@salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty20df90000008ny47eac_0e5be0b6@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	K. Amal	ak	amalakram152@gmail.com	Store Head	<input checked="" type="checkbox"/>	Store Supervisor
<input type="checkbox"/>	Teddy, John	tedd	psychoeui1730@gmail.com	Billing Operator	<input checked="" type="checkbox"/>	Billing operator
<input type="checkbox"/>	User, Integration	integ	integration/00d5h0000008ny47eac.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User, Security	sec	insightssecurity@00d5h0000008ny47eac.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Help for this Page [?](#)

Verify your identity in Sale... [Users | Salesforce - Google...](#) [Screenshot](#) [Screenshot](#) [Bell](#) [Help](#) [Feedback](#) 15:56

## 3.4 User Adoption & Approval

It is the interaction with database and their records.

## Create Our Customer Record

Setup Home Object Manager

App Launcher

Search apps or items...

Visit AppExchange

Service Console (Lightning Experience) Lets support agents work with multiple records across customer service...

Sales Manage your sales process with accounts, leads, opportunities, and more...

Lightning Usage App View Adoption and Usage Metrics for Lightning Experience

Digital Experiences Manage content and media for all of your sites...

Salesforce Scheduler Setup Set up personalized appointment scheduling...

Bolt Solutions Discover and manage business solutions designed for your industry...

Cosmetic Care management

All Items

Accounts	Communication Subscription Channel Ty...	Files	Orchestration Runs	Salesforce Scheduler Setup Assistant
Alert Settings	Communication Subscription Consents	Finance Balance Snapshots	Orchestration Work Items	Scorecards
Alternative Payment Methods	Communication Subscription Timings	Finance Transactions	Orders	Security Policies
Analytics	Communication Subscriptions	Forecasts	Org Metrics	Sellers

https://nanmudhalvan-dev-ed.lightning.force.com/lightning/app/06m5h000003DXVUAA4

Verify your identity in Sale... [Users | Salesforce - Google...](#) [Screenshot](#) [Screenshot](#) [Bell](#) [Help](#) [Feedback](#) 15:57

New our\_customer

Information

Owner: Ajmal Akram

our\_customer Name: ajay

customer\_name: aju

customer\_mail: ajay@mail.com

customer\_number: 789456132

Feedback: good

Inventory: Search Inventories...

Skincare product: Search skincare products...

Buttons: Cancel, Save & New, Save

## View Record (Our Customer)

Recently Viewed | our\_customer

our\_customers

Recently Viewed

3 items • Updated a few seconds ago

our\_customer Name

1 ajay

2 mythili

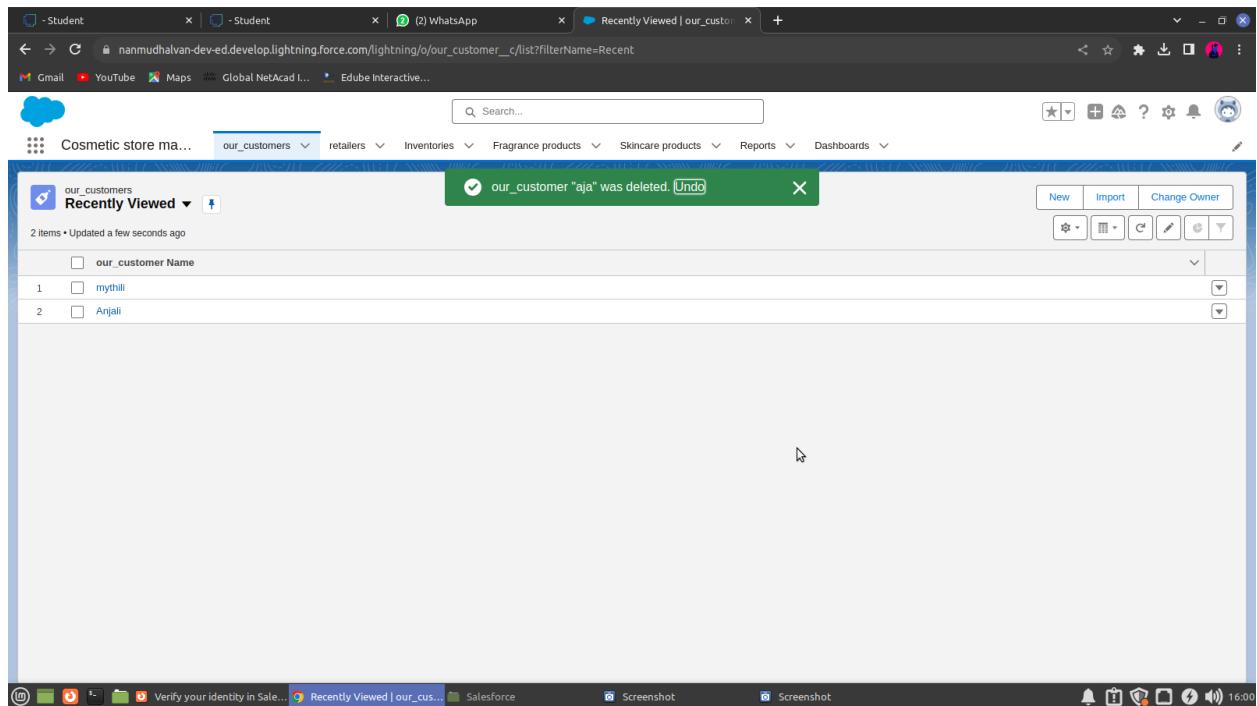
3 Anjali

Buttons: New, Import, Change Owner

The screenshot shows a Salesforce Lightning record detail page for a customer named 'aja'. The page has a header with tabs for 'Student', 'Student', 'WhatsApp', and 'aja | our\_customer | Salesforce'. The main content area is titled 'Cosmetic store ma...' and shows the 'our\_customers' tab selected. The record details for 'aja' are displayed, including fields for 'customer\_name' (aja), 'customer\_email' (aja@mail.com), 'customer\_number' (789456132), 'Feedback' (good), and 'Inventory'. The 'Activity' section is visible on the right, showing a list of activities with a 'Upcoming & Overdue' section. The bottom of the page shows the standard Salesforce navigation bar with links for 'New Contact', 'Edit', and 'New Opportunity'.

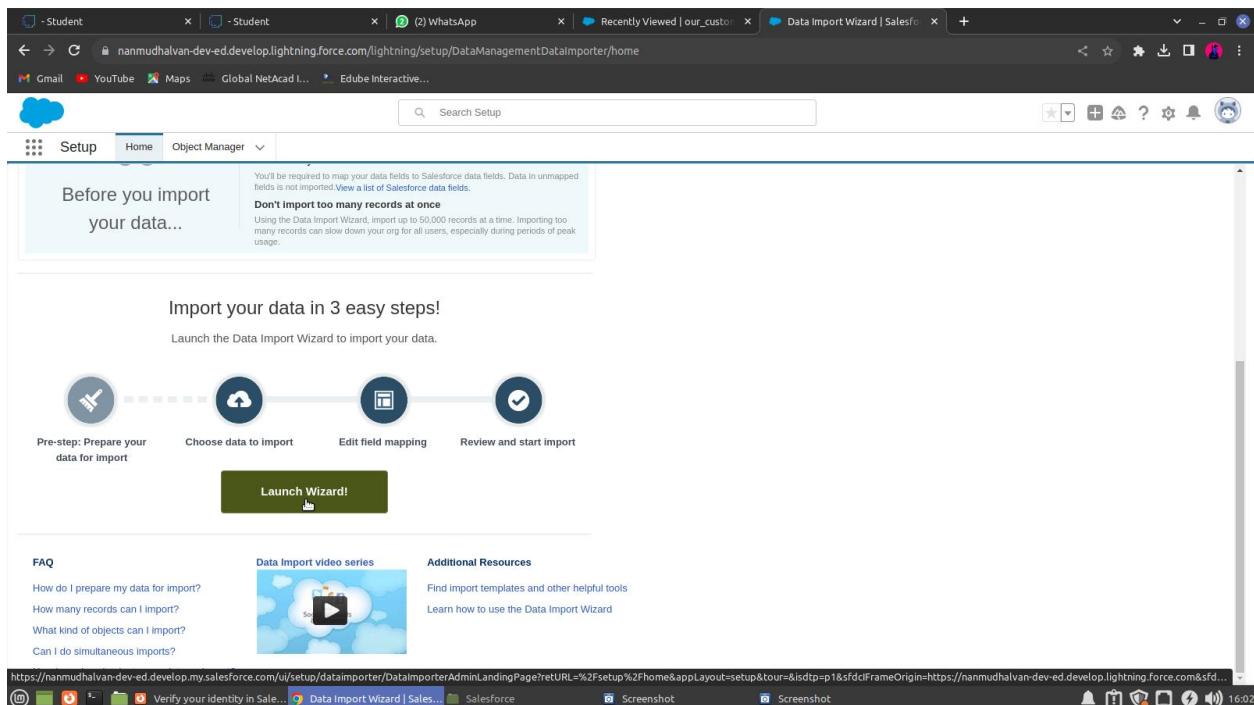
## Delete Record (Our Customer)

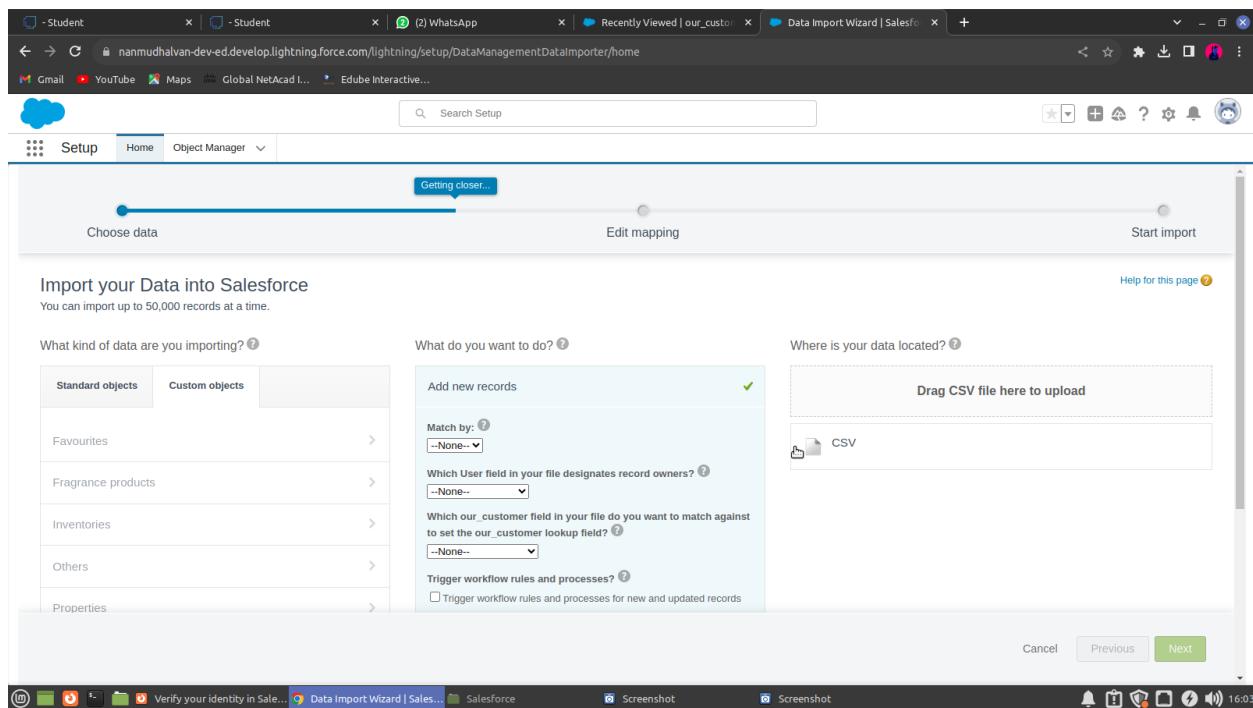
The screenshot shows a Salesforce Lightning list view for 'Recently Viewed' customers. The header shows tabs for 'Student', 'Student', '(2) WhatsApp', and 'Recently Viewed | our\_customer | Salesforce'. The main content area is titled 'Cosmetic store ma...' and shows the 'our\_customers' tab selected. The list view displays three items: 'aja', 'mythili', and 'Anjali'. A delete confirmation dialog box is overlaid on the page, asking 'Are you sure you want to delete this our\_customer?'. The dialog has 'Cancel' and 'Delete' buttons. The bottom of the page shows the standard Salesforce navigation bar with links for 'New', 'Import', and 'Change Owner'.



## Data Import

The Data Import Wizard is one of various tools available to Salesforce users for importing data. The tool is best used when importing data into the Account, Contact, Lead, or Solution objects along with any custom objects within your Salesforce organization





Getting closer...

Choose data

Import your Data into Salesforce

You can import up to 50,000 records at a time.

What kind of data are you importing? [?](#)

Standard objects Custom objects

Favourites >

Fragrance products >

Inventories >

Others >

Properties >

What do you want to do? [?](#)

Add new records ✓

Match by: [?](#)  
--None--

Which User field in your file designates record owners? [?](#)  
--None--

Which our\_customer field in your file do you want to match against to set the our\_customer lookup field? [?](#)  
--None--

Trigger workflow rules and processes? [?](#)  
 Trigger workflow rules and processes for new and updated records

Where is your data located? [?](#)

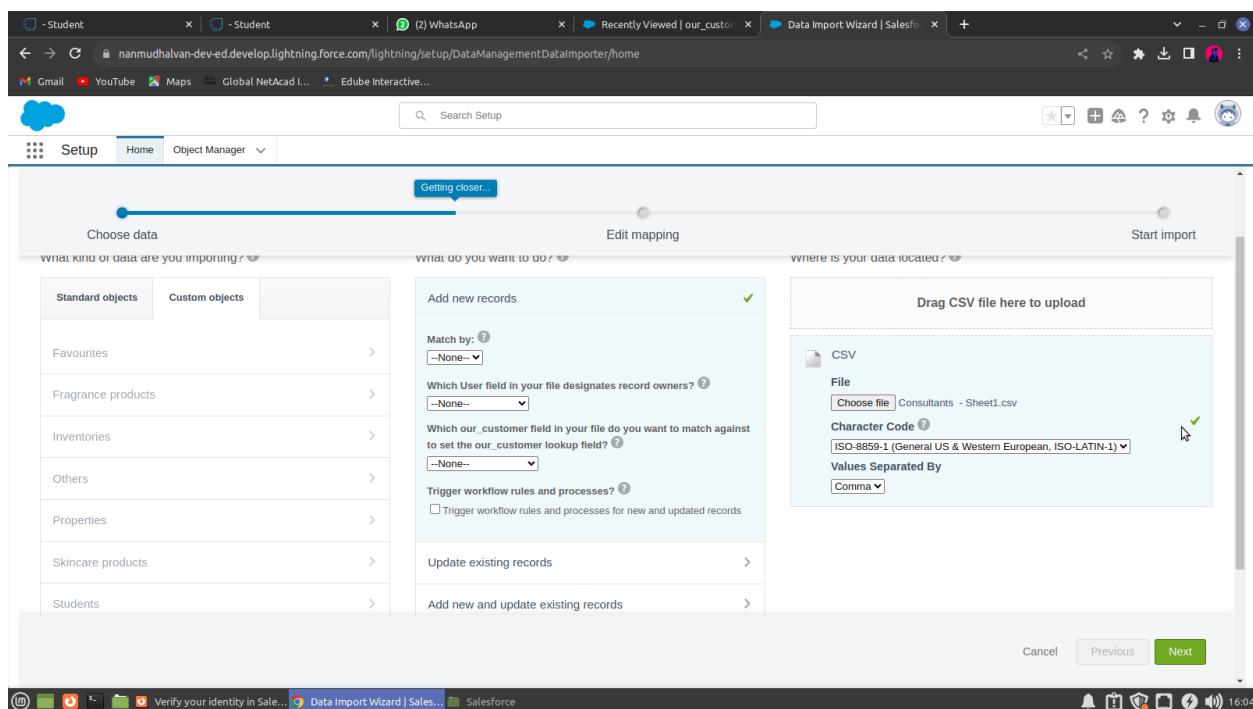
Drag CSV file here to upload

CSV

Cancel Previous Next

Downloading it via :

<https://tinyurl.com/Consultantsrecords> and Accessing to local storage.



Getting closer...

Choose data

What kind of data are you importing? [?](#)

Standard objects Custom objects

Favourites >

Fragrance products >

Inventories >

Others >

Properties >

Skincare products >

Students >

What do you want to do? [?](#)

Add new records ✓

Match by: [?](#)  
--None--

Which User field in your file designates record owners? [?](#)  
--None--

Which our\_customer field in your file do you want to match against to set the our\_customer lookup field? [?](#)  
--None--

Trigger workflow rules and processes? [?](#)  
 Trigger workflow rules and processes for new and updated records

Update existing records >

Add new and update existing records >

Where is your data located? [?](#)

Drag CSV file here to upload

CSV

File [Choose file](#) Consultants - Sheet1.csv

Character Code [?](#)  
ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Values Separated By [?](#)  
Comma

Cancel Previous Next

Student - Student - WhatsApp - Recently Viewed | our\_customers - Data Import Wizard | Salesforce

Search Setup

Setup Home Object Manager

Almost done

Choose data Edit mapping Start import

**Edit Field Mapping: consultants**

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	consultant Name	Consultant Name	Dev Raj	Ajith	Babu
Map	Unmapped <small>?</small>	Mobile Number	984638732	784653673	902839439
Change	Delivery type	Delivery Type	Self Pickup	Courier	Self Pickup
Change	Address	Address		Hyderabad	
Change	products	Products	Lipstick	Compact	Face Pack
Change	Payment	Payment	Cash	Upi	Credit Card
Map	Unmapped <small>?</small>	Email		ajith@gmail.com	Babu34@gmail.com

Cancel Previous Next

Verify your identity in Sales... Data Import Wizard | Sales... Salesforce

Student - Student - WhatsApp - Recently Viewed | our\_customers - Data Import Wizard | Salesforce

Search Setup

Setup Home Object Manager

Great job

Choose data Edit mapping Start import

**Review & Start Import**

Review your import information and click Start Import.

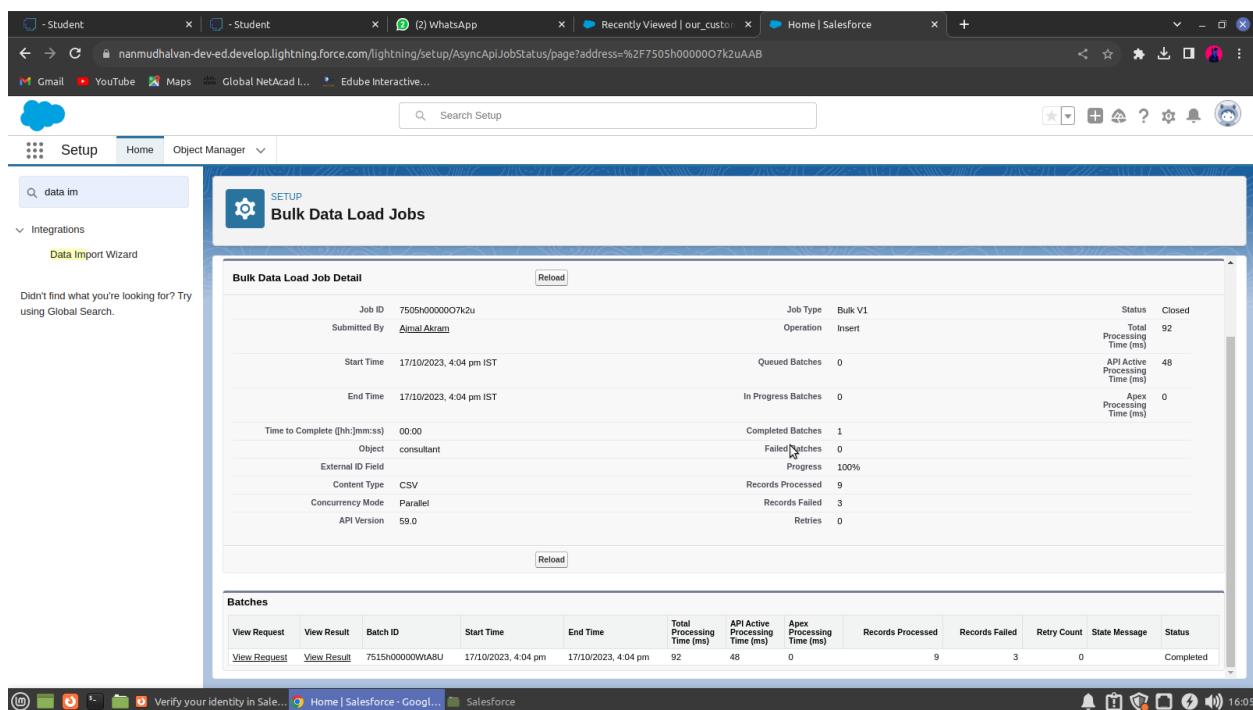
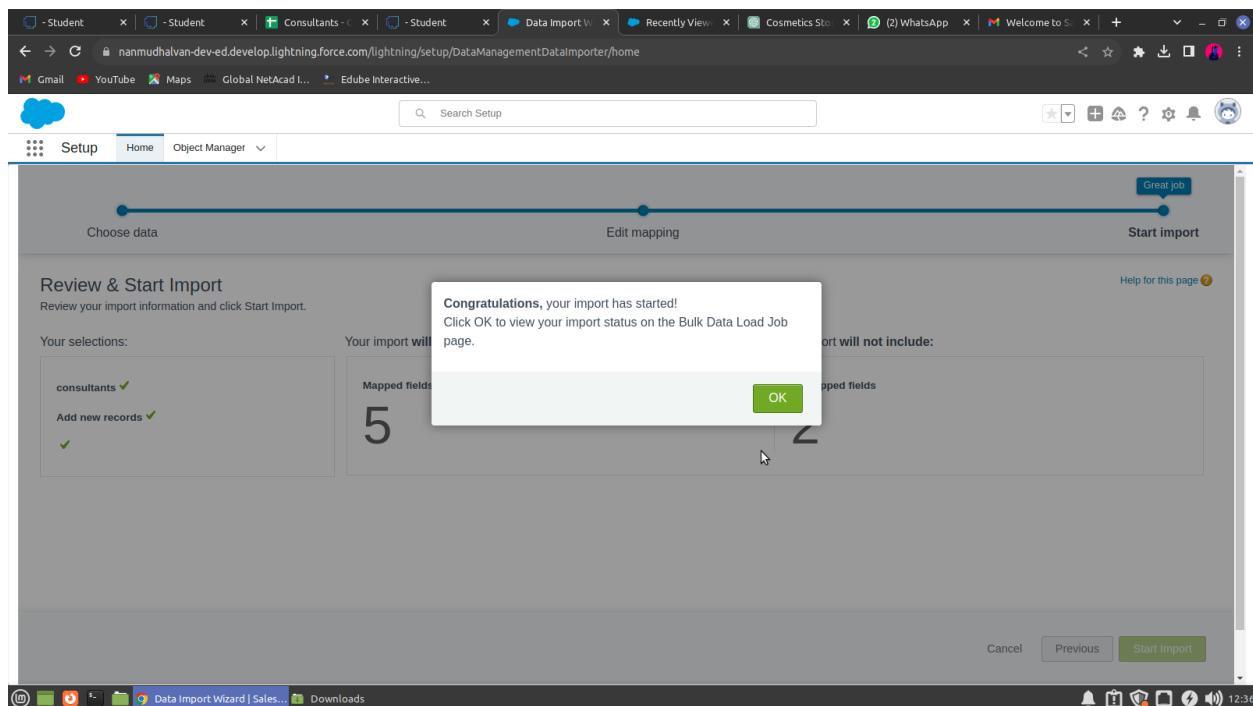
Help for this page ?

Your selections: Your import will include: Your import will not include:

consultants ✓	Mapped fields 5	Unmapped fields 2
Add new records ✓		
Consultants - Sheet1.csv ✓		

Cancel Previous Start Import

Verify your identity in Sales... Data Import Wizard | Sales... Salesforce

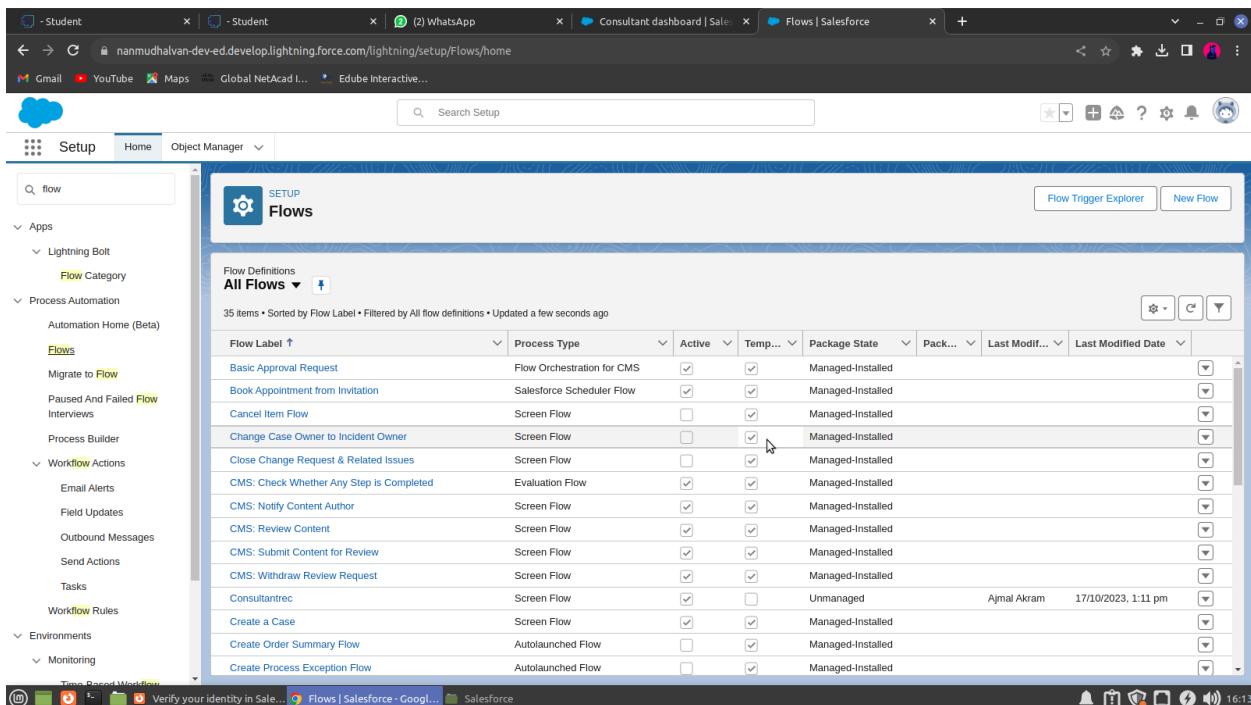


# CHAPTER-4

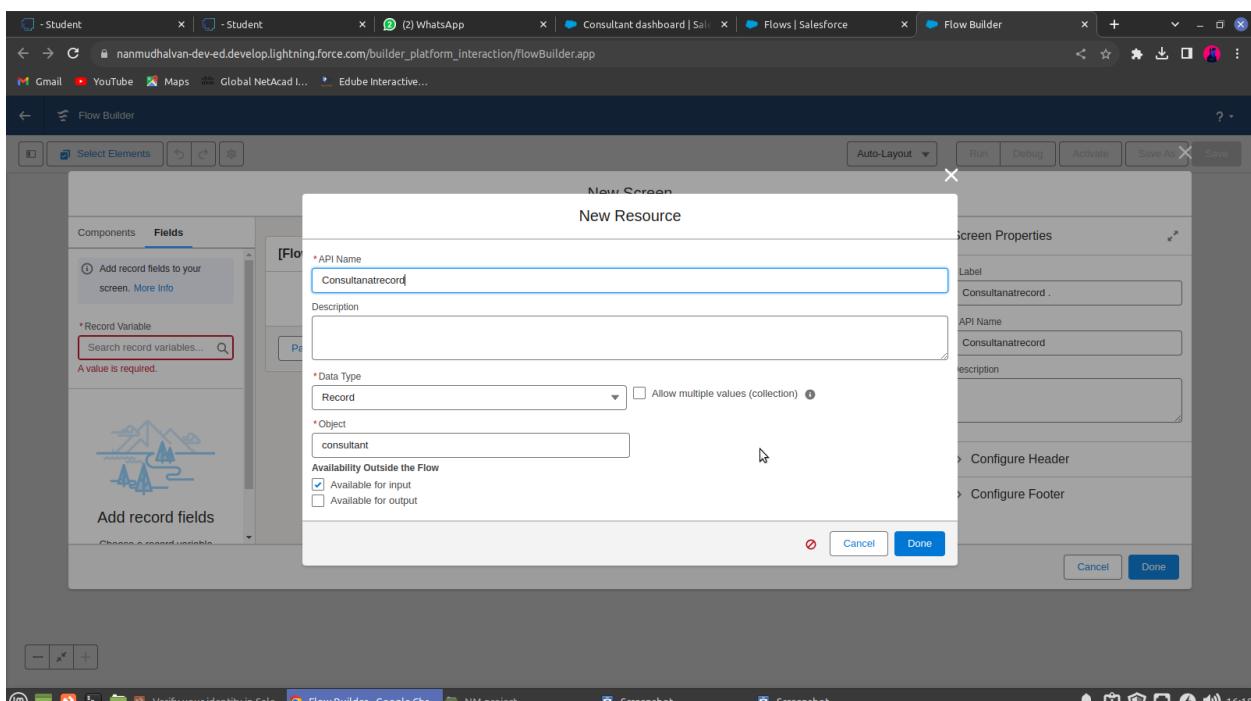
## AUTOMATION

### 4.1 Flow

The last business rule functionality to implement before testing your application is a rule to set the Out-of-State checkbox field on the Travel Approval object if out-of-state travel has been chosen. Salesforce offers workflow capabilities that provide a declarative, drag-and-drop design environment to build our business process logic.



The screenshot shows the Salesforce Setup interface with the 'Flows' tab selected. The left sidebar navigation includes 'Apps', 'Lightning Bolt', 'Process Automation (Beta)', 'Automation Home (Beta)', 'Flows', 'Workflow Actions', 'Email Alerts', 'Field Updates', 'Outbound Messages', 'Send Actions', 'Tasks', 'Workflow Rules', 'Environments', and 'Monitoring'. The main content area displays a table titled 'Flow Definitions' with a 'All Flows' dropdown. The table lists 35 items, including 'Basic Approval Request', 'Book Appointment from Invitation', 'Cancel Item Flow', 'Change Case Owner to Incident Owner', 'Close Change Request & Related Issues', 'CMS: Check Whether Any Step is Completed', 'CMS: Notify Content Author', 'CMS: Review Content', 'CMS: Submit Content for Review', 'CMS: Withdraw Review Request', 'Consultantrec', 'Create a Case', 'Create Order Summary Flow', and 'Create Process Exception Flow'. The table includes columns for 'Flow Label', 'Process Type', 'Active', 'Temp...', 'Package State', 'Pack...', 'Last Modif...', 'Last Modified Date', and 'Last Modified Date' (repeated). The 'Last Modified Date' column shows the date and time of the last modification for each flow.



The screenshot shows the Salesforce Flow Builder interface. A 'New Resource' dialog box is open, prompting for 'API Name' (set to 'ConsultanatreCORD'), 'Record Variable' (highlighted in red with an error message 'A value is required.'), 'Data Type' (set to 'Record'), 'Object' (set to 'consultant'), and 'Availability Outside the Flow' (checkboxes for 'Available for input' and 'Available for output' are checked). The 'Record Variable' field has a red border and a tooltip 'A value is required.' The 'Data Type' dropdown shows 'Record' and 'Allow multiple values (collection)'. The 'Object' dropdown shows 'consultant'. The 'Availability Outside the Flow' section has two checkboxes: 'Available for input' (checked) and 'Available for output' (unchecked). The 'Screen Properties' panel on the right shows 'Label' (set to 'ConsultanatreCORD'), 'API Name' (set to 'ConsultanatreCORD'), and 'description'. Buttons at the bottom of the dialog include 'Cancel' and 'Done'.

Flow Builder - nanmudhalvan-dev-ed.lightning.force.com

Screen Flow Start → Consultantrecordcreation Screen → newrecordconsultant Create Records → End

How Many Records to Create:  One

How to Set the Record Fields:  Use separate resources, and literal values

Create a Record of This Object: consultant

Set Field Values for the consultant

- Field: Name → Value:
- Field: consultant\_number\_c → Value:
- Field: products\_c → Value:
- Field: Payment\_c → Value:

Flow Builder - Google Chrome 13:10

Flow Builder - nanmudhalvan-dev-ed.lightning.force.com

Consultantrec - V1

Flow was activated.

Screen Flow Start → Consultantrecordcreation Screen → newrecordconsultant Create Records → End

How Many Records to Create:  One

How to Set the Record Fields:  Use separate resources, and literal values

Create a Record of This Object: consultant

Set Field Values for the consultant

- Field: Name → Value:
- Field: consultant\_number\_c → Value:
- Field: products\_c → Value:
- Field: Payment\_c → Value:

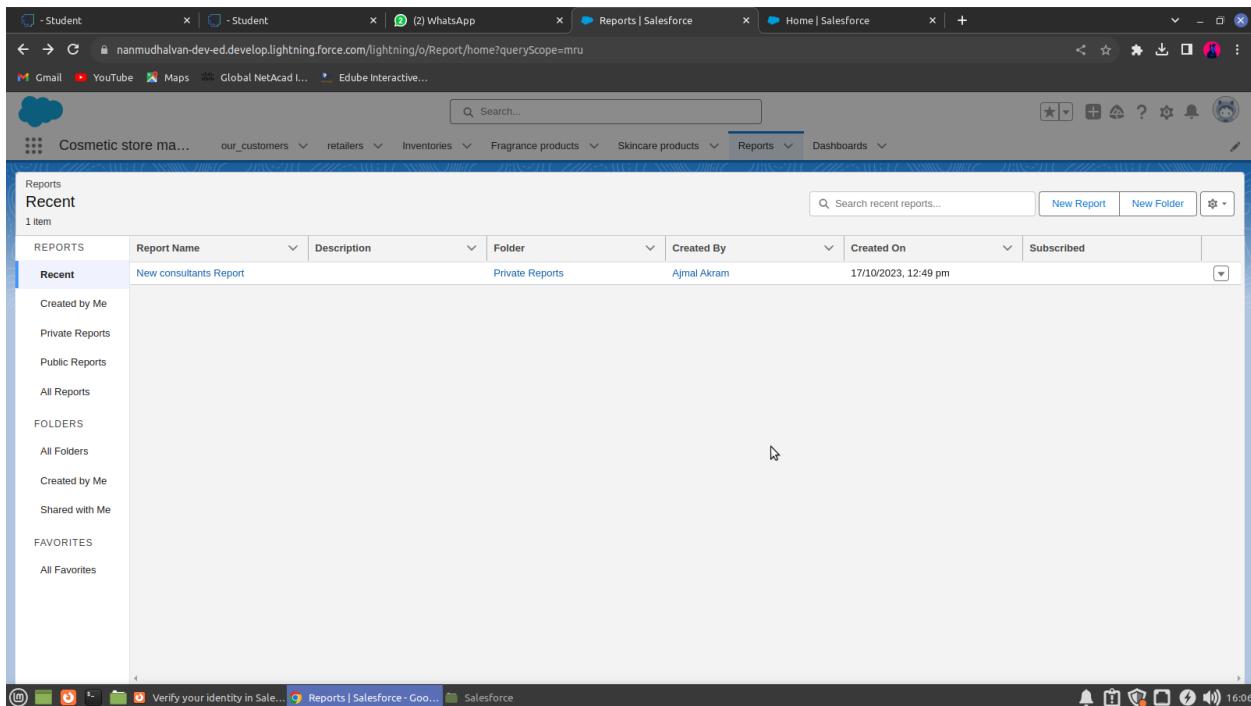
Flow Builder - Google Chrome 13:11

# CHAPTER-5

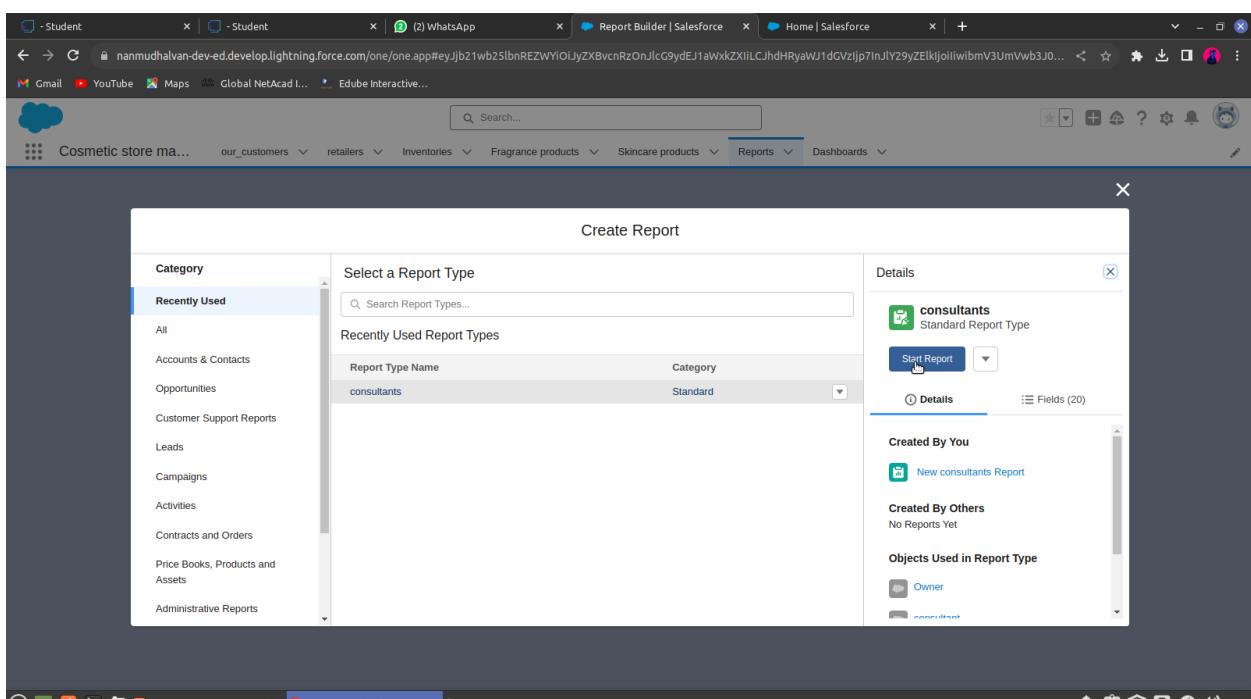
## REPORTS & DASHBOARD

### 5.1 Reports

A Salesforce report is a list of data generated based on filter criteria. Salesforce Reports helped us predict trends and gives us the advantage to increase profits. The report builder provides a drag-and-drop interface to easily build and customize your reports.



The screenshot shows the Salesforce Reports page. The top navigation bar includes tabs for Reports, Home, and Dashboards. The main content area displays a table of recent reports. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. One report is listed: "New consultants Report" in the "Private Reports" folder, created by Ajmal Akram on 17/10/2023, 12:49 pm. The left sidebar contains navigation links for Reports, Recent, and various filters like "Created by Me", "Private Reports", and "Public Reports".



The screenshot shows the Salesforce Report Builder page. The top navigation bar includes tabs for Reports, Home, and Dashboards. The main content area is titled "Create Report". It features a sidebar with "Recently Used" categories like Accounts & Contacts, Opportunities, and Leads. The central area is titled "Select a Report Type" with a search bar and a table of "Recently Used Report Types". One report type, "consultants", is selected in the table. The right sidebar is titled "Details" and shows report metadata: "consultants" (Standard Report Type), "Start Report" button, "Created By You" (Ajmal Akram), "Created By Others" (No Reports Yet), and "Objects Used in Report Type" (Owner). The bottom navigation bar includes tabs for Reports, Home, and Dashboards.

Student - Student | (2) WhatsApp | Report Builder | Salesforce | Home | Salesforce | +

nanmudhalvan-dev-ed.develop.lightning.force.com/one/one.app#eyJb21wb25lbnREZWYiOjJyZXBvcnRzOnJlcG9ydEJ1aWxkZXIiLCJhdHRyaWJ1dGVzIjp7InJy29yZElkj0liiwbmV3UmVvb3J0...

Gmail YouTube Maps Global NetAcad ... Edube Interactive...

Cosmetic store ma... our\_customers retailers Inventories Fragrance products Skincare products Reports Dashboards

REPORT New consultants Report consultants

Fields > Outline Filters 1

Groups GROUP ROWS Add group...

Columns Add column...

consultant: consultant Name # consultant\_number Delivery type Payment

	consultant: consultant Name	consultant_number	Delivery type	Payment
1	Dev Raj		- Self pickup	Cash
2	Ajith		- Courier	UPI
3	Babu		- Self pickup	Credit card
4	Swathi		- Courier	UPI
5	Ajay Kumar		- Courier	Debit card
6	Shankar		- Self pickup	Cash
7	Dev Raj		- Self pickup	Cash
8	Ajith		- Courier	UPI
9	Babu		- Self pickup	Credit card
10	Swathi		- Courier	UPI
11	Ajay Kumar		- Courier	Debit card
12	Shankar		- Self pickup	Cash
13		0		

Update Preview Automatically

Sort Ascending Sort Descending Group Rows by This Field Group Columns by This Field Bucket This Column Show Unique Count Move Left Move Right Remove Column

nanmudhalvan-dev-ed.develop.lightning.force.com/reports/lightningReportApp.app#

Verify your identity in Sales... Report Builder | Salesforce... Salesforce

16:07

Student - Student | (2) WhatsApp | Report Builder | Salesforce | Home | Salesforce | +

nanmudhalvan-dev-ed.develop.lightning.force.com/one/one.app#eyJb21wb25lbnREZWYiOjJyZXBvcnRzOnJlcG9ydEJ1aWxkZXIiLCJhdHRyaWJ1dGVzIjp7InJy29yZElkj0liiwbmV3UmVvb3J0...

Gmail YouTube Maps Global NetAcad ... Edube Interactive...

Cosmetic store ma... our\_customers retailers Inventories Fragrance products Skincare products Reports Dashboards

REPORT New consultants Report consultants

Fields > Outline Filters 1

Groups GROUP ROWS Add group...

Columns Add column...

consultant: consultant Name # consultant\_number Delivery type Payment

	consultant: consultant Name	consultant_number	Delivery type	Payment
1	Dev Raj		- Self pickup	Cash
2	Ajith		- Courier	UPI
3	Babu		- Self pickup	Credit card
4	Swathi		- Courier	UPI
5	Ajay Kumar		- Courier	Debit card
6	Shankar		- Self pickup	Cash
7	Dev Raj		- Self pickup	Cash
8	Ajith		- Courier	UPI
9	Babu		- Self pickup	Credit card
10	Swathi		- Courier	UPI
11	Ajay Kumar		- Courier	Debit card
12	Shankar		- Self pickup	Cash
13		0		

Update Preview Automatically

Edit Bucket Column

Field Payment Bucket Name

All Values (4) Search Values

NetBank (3)  VALUE BUCKET  Cash

Cash (0)  VALUE BUCKET  Cash

Unbucketed Values (1)

NetBank  Cash  Unbucketed Values

New Bucket  Bucket remaining values as Other  Add Bucket  Move To  Cancel  Apply

nanmudhalvan-dev-ed.develop.lightning.force.com/reports/lightningReportApp.app#

Verify your identity in Sales... Report Builder | Salesforce... Salesforce

16:08

Screenshot of the Salesforce Report Builder interface showing the 'Edit Bucket Column' dialog.

The dialog is for the 'Payment' field, with the 'Bucket Name' field empty. The 'All Values (4)' section shows 'NetBank (3)' and 'Cash (1)'. The 'Search Values' section shows 'Value' and 'Bucket' columns with 'Cash' under 'Value' and 'Cash' under 'Bucket'.

Value	Bucket
NetBank (3)	NetBank
Cash (1)	Cash
Unbucketed Values (0)	

Buttons at the bottom include 'Add Bucket', 'Move To', 'Cancel', and 'Apply'.

Screenshot of the Salesforce Report Builder interface showing the 'Edit Bucket Column' dialog.

The dialog is for the 'Payment' field, with the 'Bucket Name' field empty. The 'All Values (4)' section shows 'NetBank (3)' and 'Cash (1)'. The 'Search Values' section shows 'Value' and 'Bucket' columns with 'Credit card', 'Debit card', and 'UPI' under 'Value' and 'NetBank' under 'Bucket'.

Value	Bucket
NetBank (3)	NetBank
Cash (1)	NetBank
Unbucketed Values (0)	

Buttons at the bottom include 'Add Bucket', 'Move To', 'Cancel', and 'Apply'.

Student - Student - WhatsApp - New consultants Report | Sales - Home | Salesforce

nanmudhalvan-dev-ed.lightning.force.com/lightning//Report/00O5h000007tKuBEAU/view?queryScope=userFolders

Gmail YouTube Maps Global NetAcad ... Edube Interactive...

Search...

Cosmetic store ma... our\_customers retailers Inventories Fragrance products Skincare products Reports Dashboards

Report: consultants New consultants Report

Total Records 12

	Payment type	consultant: consultant Name	Delivery type	products
NetBanking (8)	Ajith	Courier	compact	
	Babu	Self pickup	Face pack	
	Swathi	Courier	Nail polish	
	Ajay Kumar	Courier	Lip balm	
	Ajith	Courier	compact	
	Babu	Self pickup	Face pack	
	Swathi	Courier	Nail polish	
	Ajay Kumar	Courier	Lip balm	
Subtotal				
Cash (4)	Dev Raj	Self pickup	Lipstick	
	Shankar	Self pickup	Face pack	
	Dev Raj	Self pickup	Lipstick	
	Shankar	Self pickup	Face pack	
Subtotal				
Total (12)				

Row Counts Detail Rows Subtotals Grand Total

Verify your identity in Sales... New consultants Report | ... Salesforce

## View Report

Student - Student - WhatsApp - Reports | Salesforce - Home | Salesforce

nanmudhalvan-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=mru

Gmail YouTube Maps Global NetAcad ... Edube Interactive...

Search...

Cosmetic store ma... our\_customers retailers Inventories Fragrance products Skincare products Reports Dashboards

Reports Recent 1 item

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New consultants Report	Private Reports	Ajmal Akram	17/10/2023, 12:49 pm		

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

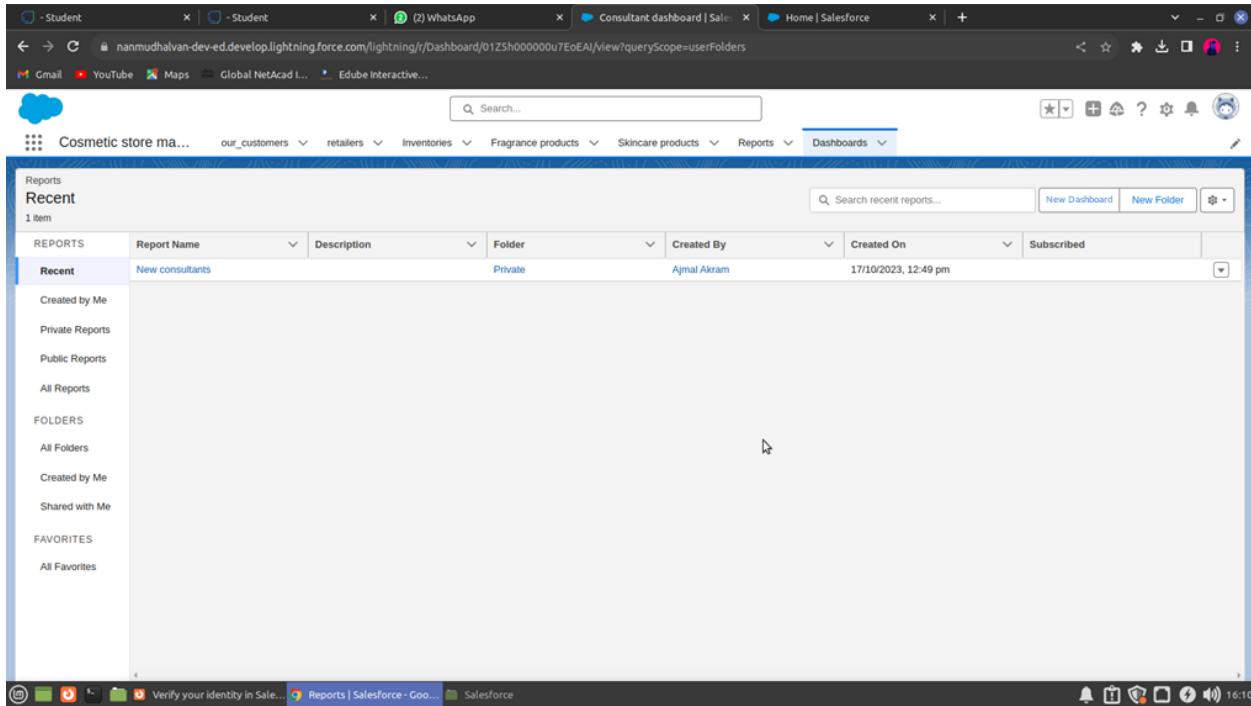
FAVORITES

All Favorites

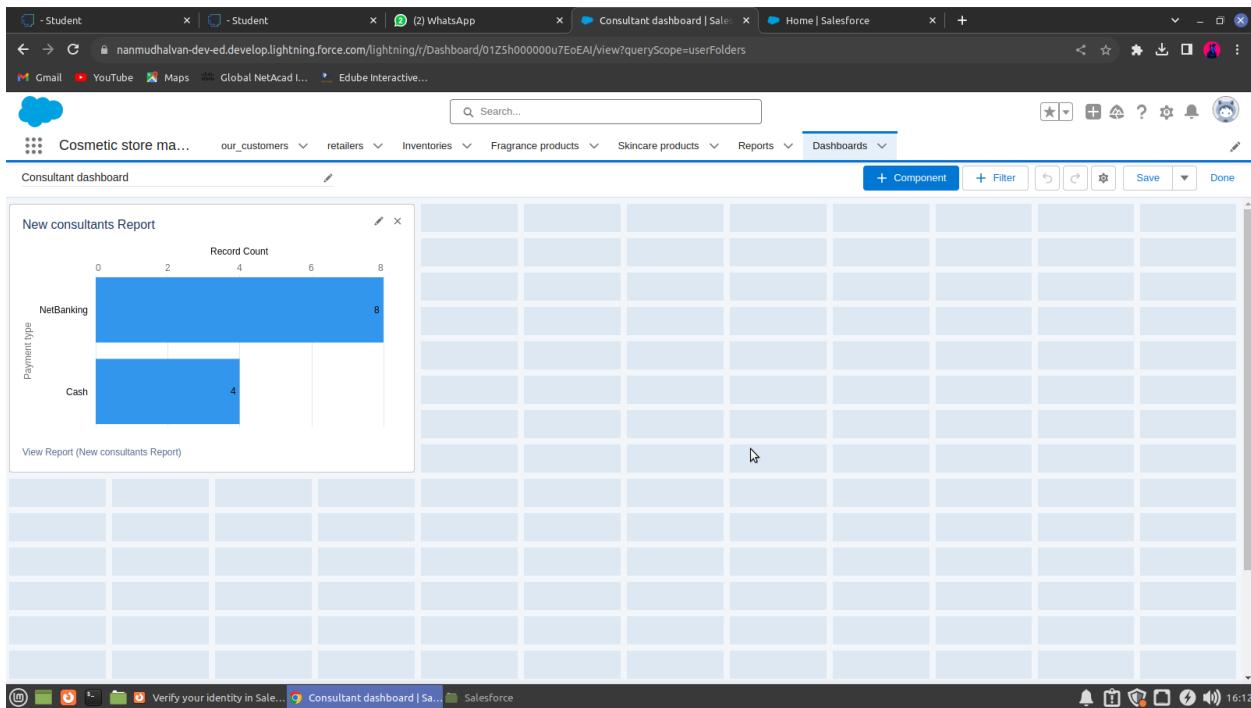
Verify your identity in Sales... Reports | Salesforce - Goo... Salesforce

## 5.2 Dashboard

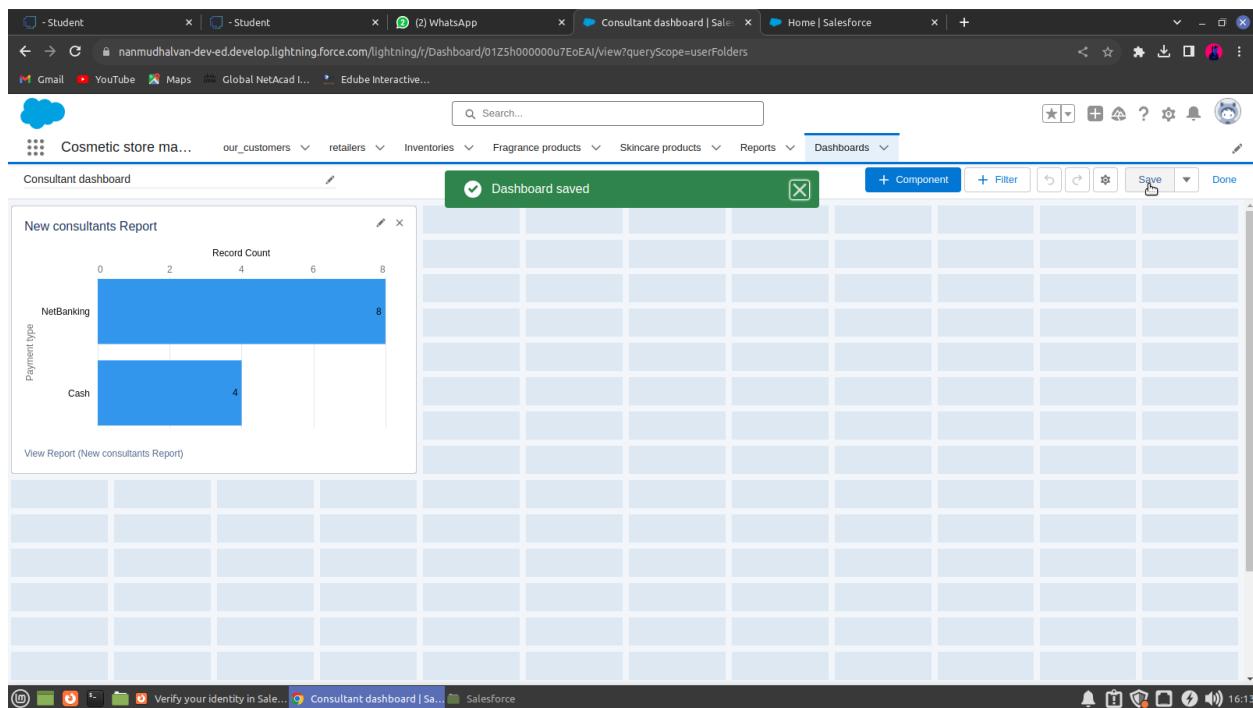
A dashboard provides an interactive visual display of key metrics and trends. Multiple dashboard components can be shown together on a single dashboard layout, creating rich visual displays of multiple reports that have a common theme.



The screenshot shows the Salesforce Reports interface. The top navigation bar includes tabs for Student, Student, WhatsApp, Consultant dashboard | Sales, and Home | Salesforce. The main content area is titled 'Recent' and shows a table of recent reports. The table has columns for REPORTS, Report Name, Description, Folder, Created By, Created On, and Subscribed. One report is listed: 'New consultants' (Report Name), 'Private' (Folder), 'Ajmal Akram' (Created By), '17/10/2023, 12:49 pm' (Created On). On the left, a sidebar lists categories: Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), Folders (All Folders, Created by Me, Shared with Me), and Favorites (All Favorites). The bottom of the screen shows the Windows taskbar with various icons and the system tray.



The screenshot shows the Salesforce Consultant dashboard. The top navigation bar is identical to the previous screenshot. The main content area is titled 'Consultant dashboard' and contains a chart component titled 'New consultants Report'. The chart is a horizontal bar chart with 'Payment type' on the y-axis (NetBanking, Cash) and 'Record Count' on the x-axis (0, 2, 4, 6, 8). The data shows 8 records for NetBanking and 4 records for Cash. Below the chart is a link 'View Report (New consultants Report)'. The top right of the dashboard has buttons for '+ Component', '+ Filter', 'Save', and 'Done'. The bottom of the screen shows the Windows taskbar and system tray.



Consultant dashboard | Sales...

Dashboard saved

New consultants Report

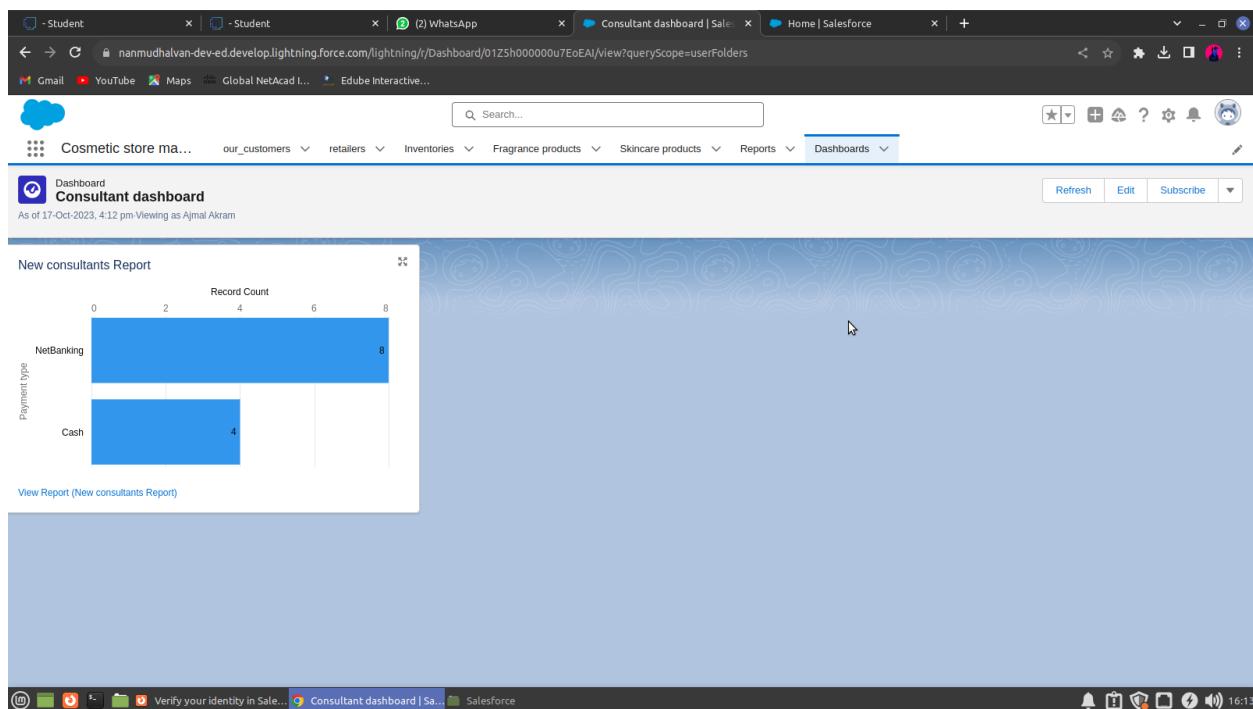
Payment type	Record Count
NetBanking	8
Cash	4

View Report (New consultants Report)

Consultant dashboard | Sales...

16:13

## View Dashboard



Consultant dashboard | Sales...

Dashboard

Consultant dashboard

As of 17-Oct-2023, 4:12 pm-Viewing as Ajmal Akram

New consultants Report

Payment type	Record Count
NetBanking	8
Cash	4

View Report (New consultants Report)

Consultant dashboard | Sales...

16:13

## **CHAPTER-6**

## **CONCLUSION**

In conclusion, the Salesforce-based Cosmetics Store Management project aims to address the significant challenges faced by employees in cosmetics stores when it comes to managing customer records, processing orders, and generating discount coupons. The project's primary goal is to create an efficient, automated system that enhances operational efficiency, reduces errors, and ultimately improves customer satisfaction.

Through the design and implementation of custom objects, user profiles, and automation tools, the project offers a unique and tailored solution for cosmetics stores. The use of Salesforce as the platform ensures a secure, scalable, and customizable environment to meet the specific needs of the business.

By streamlining data entry, order processing, and coupon generation, this project not only simplifies the daily tasks of employees but also contributes to the store's growth and success. It enables personalized customer engagement, data-driven decision-making, and efficient management of customer relationships.

The project emphasizes the social impact of enhancing the customer experience, potentially leading to increased customer loyalty and revenue. It also aligns with the digital transformation trend in the retail industry, where businesses are leveraging technology to stay competitive and meet customer expectations.

In summary, the Salesforce Cosmetics Store Management project has the potential to revolutionize how cosmetics stores operate, providing a competitive advantage and customer-centric approach that can lead to long-term success in the industry.

# **CHAPTER-7**

## **PROJECT DEMONSTRATION**

### **GitHub:**

[https://github.com/ArunJ812002/ArunJ\\_BB31912D7B40CF9B71448FFEC848F21B](https://github.com/ArunJ812002/ArunJ_BB31912D7B40CF9B71448FFEC848F21B)

### **Demo Link:**

[https://drive.google.com/file/d/1EkdrmRRWMPPeAohAYiN-J0D9DnVXoSPY/view?usp=drive\\_link](https://drive.google.com/file/d/1EkdrmRRWMPPeAohAYiN-J0D9DnVXoSPY/view?usp=drive_link)