

Project Report on

Cosmetics Store Management

Project Group Name : CosmeticsStoreManagement17GP

1. Creating Developer Account

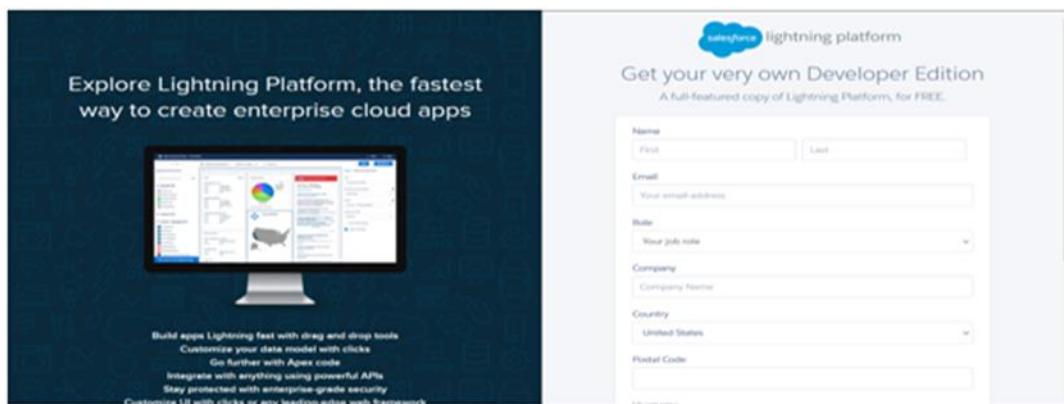
Creating a developer org in salesforce.

1. Go to [developers.salesforce.com/](https://developer.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 :

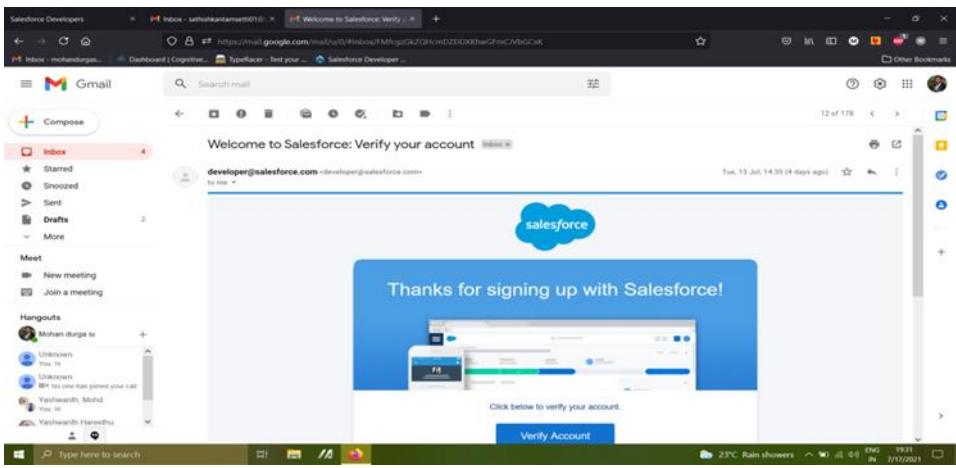
username@organization.com

Click on sign up after filling these.



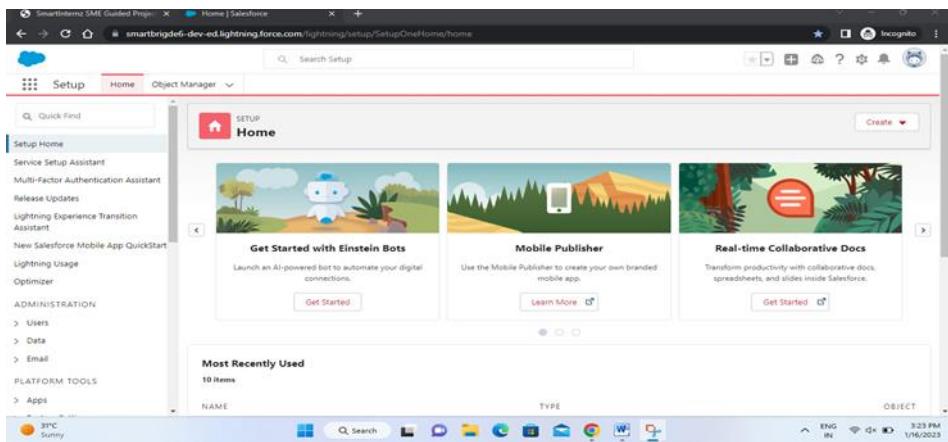
Account Activation

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



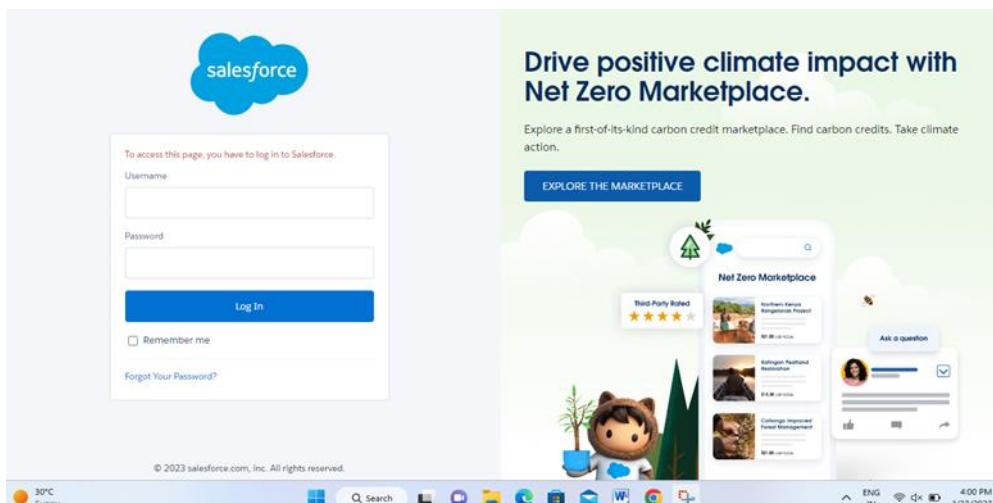
Login To Your Salesforce Account

- 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

<https://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.

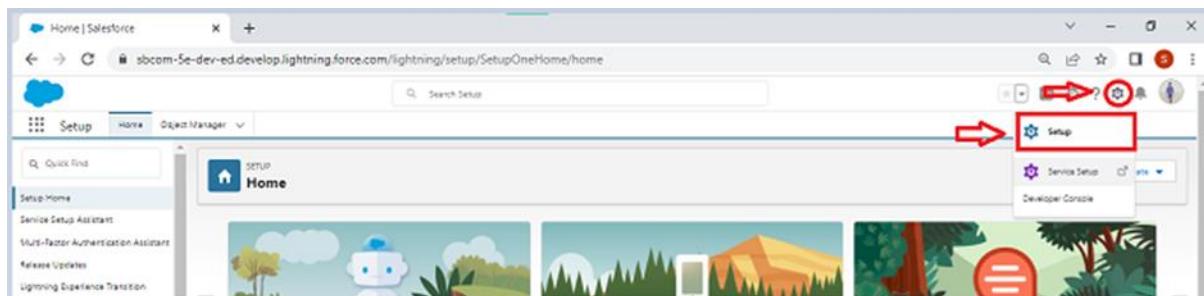
1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

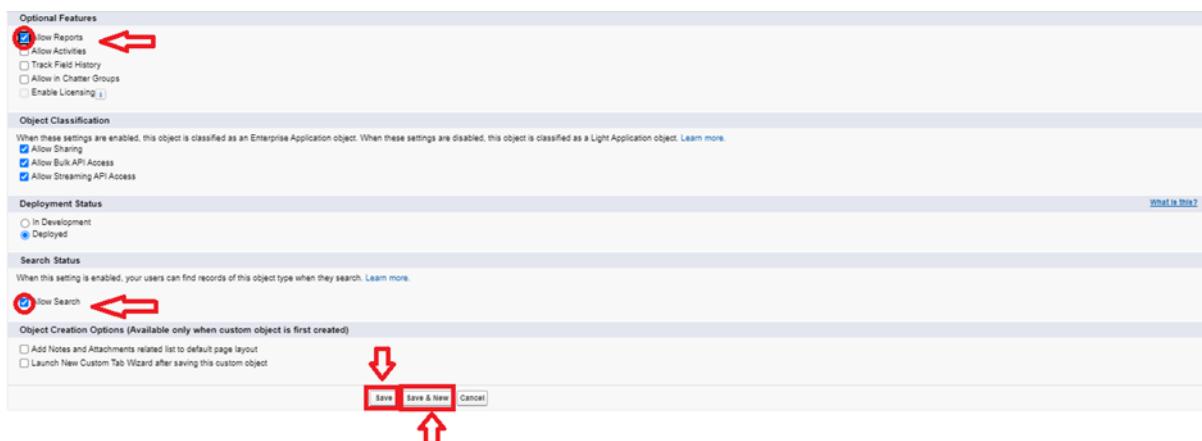
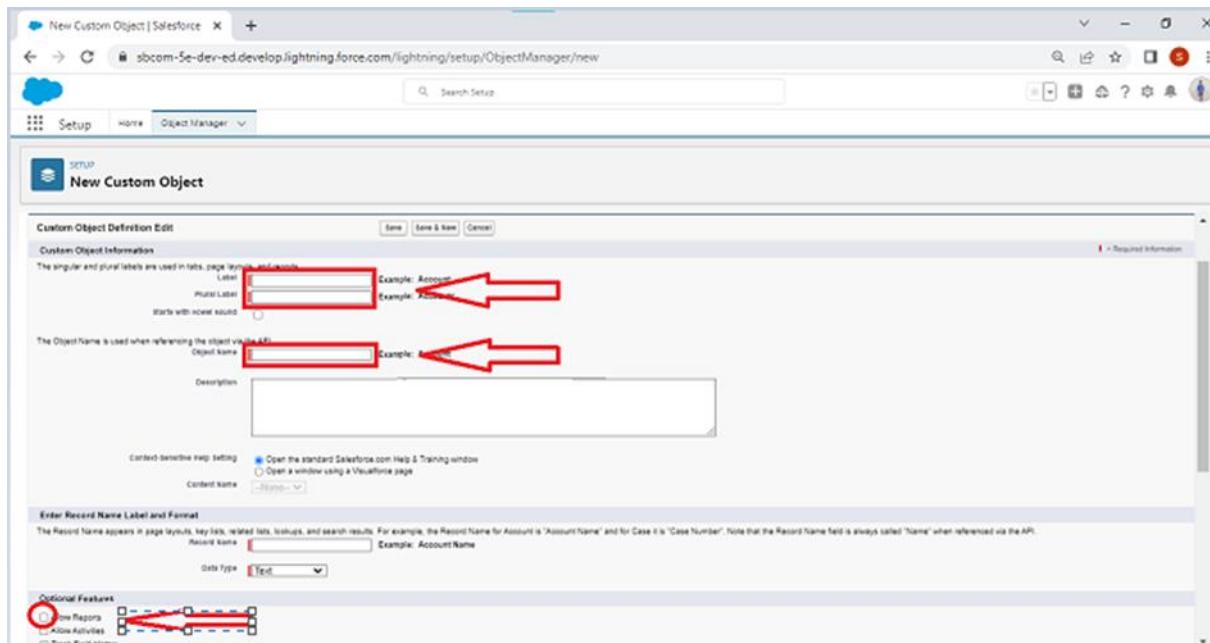
Creation of Our Customer Object.

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 |

It's Better in Lightning
Move to Lightning Experience and give your users a productivity boost.

Our Customer
New Custom Field

Step 1. Choose the field type

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.
- The ownership and sharing of a detail record are determined by the master record.

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.

Step 1

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 | <u>Lookup</u> (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 .

The screenshot shows the Salesforce Object Manager interface for the 'Consultant' object. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts (which is highlighted with a red box and labeled '1'), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Page Layouts' and shows a table with one item: 'Consultant Layout'. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The 'Consultant Layout' row shows 'Consultant Layout' in the first column, 'Hazari Ajay Kumar, 4/1/2023, 7:25 AM' in the second, and 'Hazari Ajay Kumar, 6/18/2023, 10:30 PM' in the third. There are also 'Quick Find', 'New', and 'Page Layout Assignment' buttons at the top right of the table. A red box highlights the 'Consultant Layout' entry in the table, labeled '2'.

SETUP > OBJECT MANAGER
Consultant

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

| Section | Created By | Owner | Products |
|-----------------|------------------|----------------|----------|
| Blank Space | Customer Id | Payment | |
| Address | Delivery Type | Phone | |
| Consultant Name | Last Modified By | Preferred Item | |

Information (Header visible on edit only)

| | | | |
|-----------------|-----------------|-------|-------------|
| Customer Id | GEN-2004-001234 | Owner | Sample Text |
| Consultant Name | Sample Text | | |
| Phone | 1-415-555-1212 | | |
| Preferred Item | Sample Text | | |
| Products | Sample Text | | |
| Payment | Sample Text | | |
| Delivery Type | Sample Text | | |
| Address | Sample Text | | |

5.Click on Save

SETUP > OBJECT MANAGER
Consultant

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

| Section | Created By | Owner | Products |
|-----------------|------------------|----------------|----------|
| Blank Space | Customer Id | Payment | |
| Address | Delivery Type | Phone | |
| Consultant Name | Last Modified By | Preferred Item | |

Information (Header visible on edit only)

| | | | |
|-----------------|-----------------|-------|-------------|
| Customer Id | GEN-2004-001234 | Owner | Sample Text |
| Consultant Name | Sample Text | | |
| Phone | 1-415-555-1212 | | |
| Delivery Type | Sample Text | 1 | |
| Address | Sample Text | | |
| Preferred Item | Sample Text | | |
| Products | Sample Text | | |
| Payment | Sample Text | | |

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.

App Manager | Salesforce

Lightning Experience App Manager

Clone (Beta)

New Lightning App

Did you find what you're looking for? Try using Global Search.

Enable App Cloning: Enabled

| App Name | Developer Name | Description | Last Modified | Type |
|-------------------------------|----------------------|--|----------------------|---------------------|
| All Tabs | AltTabSet | Build CRM Analytics dashboards and apps | 04/12/2022, 10:13 am | Classic |
| Analytics Studio | Insights | Build CRM Analytics dashboards and apps | 04/12/2022, 10:13 am | Classic |
| App Launcher | AppLauncher | App Launcher tabs | 04/12/2022, 10:12 am | Classic |
| Bolt Solutions | LightningBolt | Discover and manage business solutions designed for your industry | 04/12/2022, 10:16 am | Lightning |
| Chatter Desktop | Chatter/Desktop | Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected... | 29/12/2022, 4:04 pm | Connected (Managed) |
| Chatter Mobile for BlackBerry | ChatterForBlackBerry | The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view feed... | 29/12/2022, 4:05 pm | Connected (Managed) |
| College Management System | Naheed | demo app | 08/12/2022, 4:19 pm | Lightning |
| Community | Community | Salesforce CRM Communities | 04/12/2022, 10:13 am | Classic |
| Content | Content | Salesforce CRM Content | 04/12/2022, 10:13 am | Classic |
| Data Manager | DataManager | Use Data Manager to view limits, monitor usage, and manage recipes | 04/12/2022, 10:13 am | Lightning |

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

New Lightning App

App Details & Branding

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

App Details

* App Name: *

* Developer Name:

Description:

App Branding

Image: 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

3.To Add Navigation Items:

New Lightning App

Navigation Items

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

Available Items

Type to filter list... *

- Accounts
- Activities
- Alert Settings
- All Sites
- Alternative Payment Methods
- App Launcher
- Appointment Invitations

Selected Items

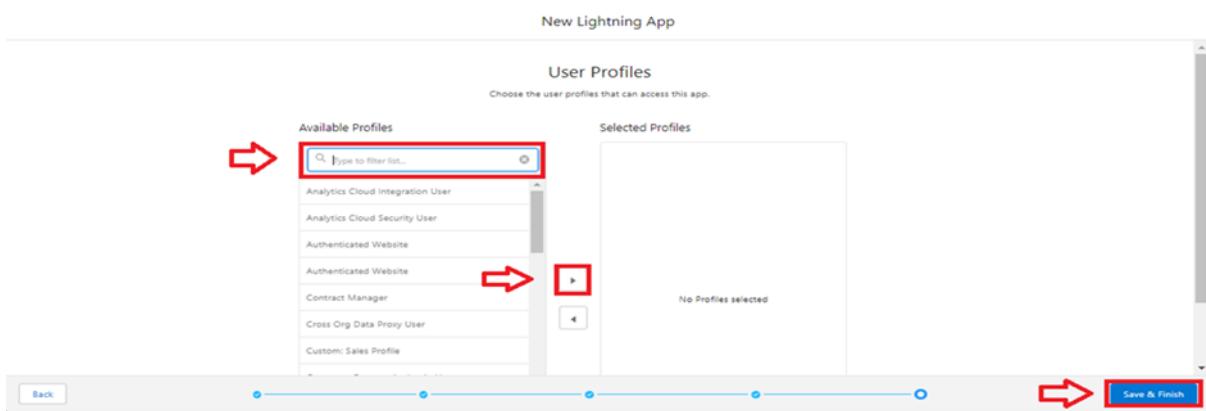
No items selected

Next

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

Q prof

Users

Profiles

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

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile Standard User
User License Salesforce
Profile Name

Save Cancel

While still on the profile page, then click Edit.

Q profi

Users

Profiles

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

Profile
Store Supervisor

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing the profile or changing the user's assignment to a different profile.

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 [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [1] | Enabled External Data Source Access [0]
Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access
Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail

| Name | Store Supervisor | Action |
|--------------|------------------|------------|
| User License | Salesforce | Edit |
| Description | | Clone |
| | | Delete |
| | | View Users |

Custom Profile

Q prof

Users

Profiles

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

Access

| | |
|--|---|
| (standard__LightningSobject) | (standard__Chatter) |
| Community (standard__Community) | Salesforce Scheduler Setup |
| Content (standard__Content) | (standard__LightningScheduler) |
| Data Manager (standard__DataManager) | Sample Console |
| Digital Experiences (standard__SalesforceCMS) | (standard__ServiceConsole) |
| Lightning Usage App (standard__LightningInstrumentation) | Service (standard__Service) |
| LWC LEARNINGS (LWC__LEARNINGS) | Service Console |
| Marketing (standard__Marketing) | (standard__LightningService) |
| Queue Management (standard__QueueManagement) | Site.com (standard__Sites) |
| Rental Management (Rental_Management) | Subscription Management (standard__RevenueCloudConsole) |
| | Urban Color (Urban_Color) |
| | Vehicle Management (Vehicle_Management) |
| | WDC (standard__Work) |

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

| Async Operation Results | <input type="checkbox"/> |
|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Back Syncs | <input type="checkbox"/> |
| Branches | <input type="checkbox"/> |
| Change Bundles | <input type="checkbox"/> |
| Change Bundle Installs | <input type="checkbox"/> |
| Change Submissions | <input type="checkbox"/> |
| Commercial Vehicles | <input type="checkbox"/> |
| Consultants | <input checked="" type="checkbox"/> |
| Customers | <input type="checkbox"/> |
| Customer Details | <input type="checkbox"/> |
| Deploy Components | <input type="checkbox"/> |
| Deployment Results | <input type="checkbox"/> |
| Others | <input checked="" type="checkbox"/> |
| Our Customers | <input checked="" type="checkbox"/> |
| Pipelines | <input type="checkbox"/> |
| Pipeline Stages | <input type="checkbox"/> |
| Projects | <input type="checkbox"/> |
| Properties | <input type="checkbox"/> |
| Remote Changes | <input type="checkbox"/> |
| Rentals | <input type="checkbox"/> |
| Repositories | <input type="checkbox"/> |
| Retailers | <input checked="" type="checkbox"/> |
| Semesters | <input type="checkbox"/> |
| Source Member References | <input type="checkbox"/> |

SETUP Profiles

AIRPORT CHARTER FOR EMPLOYEES

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 | <input type="checkbox"/> |
| Require a minimum 1 day password lifetime | <input type="checkbox"/> |
| Don't immediately expire links in forgot password emails | <input type="checkbox"/> <input type="checkbox"/> |

Buttons: Save | Save & New | Cancel

Click on Save.

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

Setup Home Object Manager

Q profi

Users Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

= Required Information

| | |
|------------------|------------------------|
| Existing Profile | Standard Platform User |
| User License | Salesforce Platform |
| Profile Name | Billing Operator |

Buttons: Save | Cancel

SETUP Profiles

Profile Edit **Billing Operator** Help for this Page ?

Set the permissions and page layouts for this profile.

| Profile Edit | | Save | Save & New | Cancel |
|--------------|---|------|------------|--------|
| Name | <input type="text" value="Billing Operator"/> | | | |
| User License | Salesforce | | | |
| Description | <input type="text"/> | | | |

SETUP Profiles

| | | | | | |
|--|-------------------------------------|-----------------------|---|-------------------------------------|----------------------------------|
| 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"/> |
| Data Manager (standard__DataManager) | <input checked="" type="checkbox"/> | <input type="radio"/> | Service (standard__Service) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| Digital Experiences (standard__SalesforceCMS) | <input checked="" type="checkbox"/> | <input type="radio"/> | Service Console (standard__LightningService) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| Lightning Usage App (standard__LightningInstrumentation) | <input checked="" type="checkbox"/> | <input type="radio"/> | Site.com (standard__Sites) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| LWC LEARNINGS (LWC__LEARNINGS) | <input type="checkbox"/> | <input type="radio"/> | Subscription Management (standard__RevenueCloudConsole) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| Marketing (standard__Marketing) | <input checked="" type="checkbox"/> | <input type="radio"/> | Urban Color (Urban_Color) | <input type="checkbox"/> | <input checked="" type="radio"/> |
| Queue Management (standard__QueueManagement) | <input checked="" type="checkbox"/> | <input type="radio"/> | Vehicle Management (Vehicle_Management) | <input type="checkbox"/> | <input type="radio"/> |
| Rental Management (Rental_Management) | <input type="checkbox"/> | <input type="radio"/> | WDC (standard__Work) | <input checked="" type="checkbox"/> | <input type="radio"/> |

Service Provider Access

SETUP Profiles

ALLOW CHAT FOR EMPLOYEES [?](#)

Password Policies

| | |
|--|--|
| User passwords expire in | <input type="text" value="90 days"/> |
| Enforce password history | <input type="text" value="3 passwords remembered"/> |
| Minimum password length | <input type="text" value="8"/> |
| Password complexity requirement | <input type="text" value="Must include alpha and numeric characters"/> |
| Password question requirement | <input type="text" value="Cannot contain password"/> |
| Maximum invalid login attempts | <input type="text" value="10"/> |
| Lockout effective period | <input type="text" value="15 minutes"/> |
| Obscure secret answer for password resets | <input type="checkbox"/> |
| Require a minimum 1 day password lifetime | <input type="checkbox"/> |
| Don't immediately expire links in forgot password emails | <input type="checkbox"/> ? |

Save Save & New Cancel

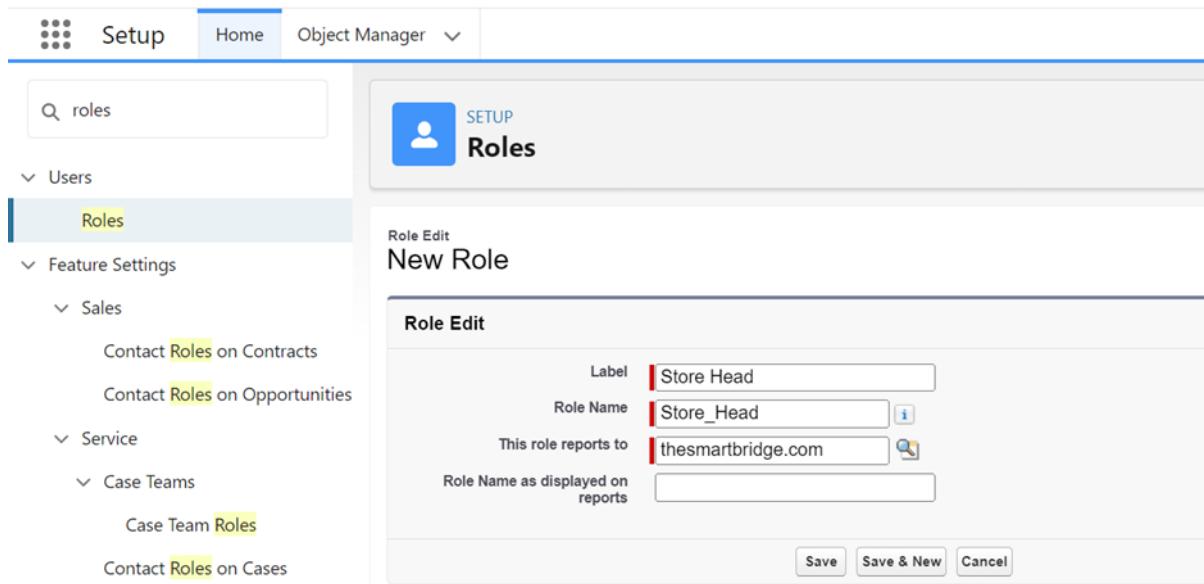
Click on Save.

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 .

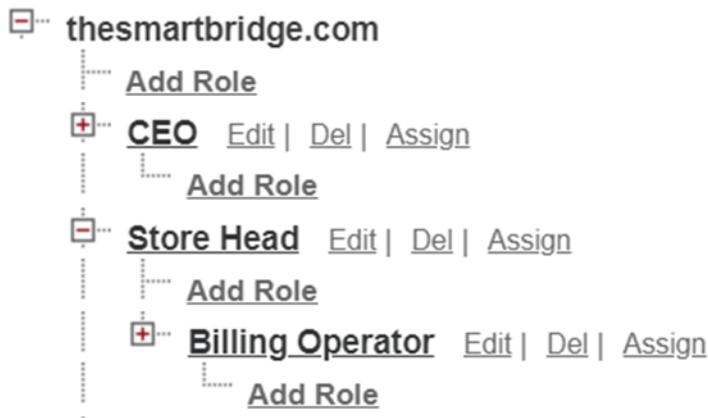
Similarly create One Roles under Store Head as Billing Operator.



The screenshot shows the Salesforce Setup interface under the 'Users' section. In the 'Roles' sub-section, a new role is being created. The 'Label' field contains 'Billing Operator', the 'Role Name' field contains 'Billing_Operator', and the 'This role reports to' dropdown is set to 'Store Head'. There is a note below stating 'Role Name as displayed on reports'. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)



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, nickname, role, user licence, profiles) ? save.

The screenshot shows the Salesforce Setup interface under the 'Users' section. In the 'User Management Settings' sub-section, a new user is being created. The 'General Information' tab is selected, showing fields for First Name (Amar), Last Name (K), Alias (ak), Email (amalid@gmail.com), Username (amar2133@sforce.com), Nickname (User167161323313747430), Title (Store Supervisor), Role (Store Head), User License (Salesforce), Profile (Store Supervisor), Active (checked), and Department (Data.com). Other tabs like 'Permissions' and 'Advanced' are visible at the bottom.

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with various settings like Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, and a selected 'Users' option under Feature Settings. The main content area is titled 'SETUP Users' and contains sections for Single Sign On Information, Locale Settings, and Approver Settings. It includes fields for Federation ID, Time Zone (selected as '(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)'), Locale (English (United States)), Language (English), Delegated Approver, Manager, and a dropdown for Receive Approval Request Emails set to 'Only if I am an approver'. At the bottom are Save, Save & New, and Cancel buttons.

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

The top screenshot shows the App Launcher with the 'Urban Color' app selected (marked with a red box labeled 1). The search bar also has 'Urban' typed into it. The bottom screenshot shows the 'Our Customers' tab selected (marked with a red box labeled 1). A 'Recently Viewed' sidebar is visible on the left, and the main area shows a message: '0 items • Updated a few seconds ago' and 'Customer Name'. The 'New' button is highlighted with a red box labeled 2.

Information 1

* Customer Name
 Complete this field.

Customer id

* Phone

Email id

Address

2

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

Urban Color Consultants ▾ Retailers ▾ others ▾ 1

Our Customers Recently Viewed ▾ 2

2 items • Updated a few seconds ago

| | Customer Name |
|---|---------------------------------|
| 1 | <input type="checkbox"/> Suresh |
| 2 | <input type="checkbox"/> Kamal |

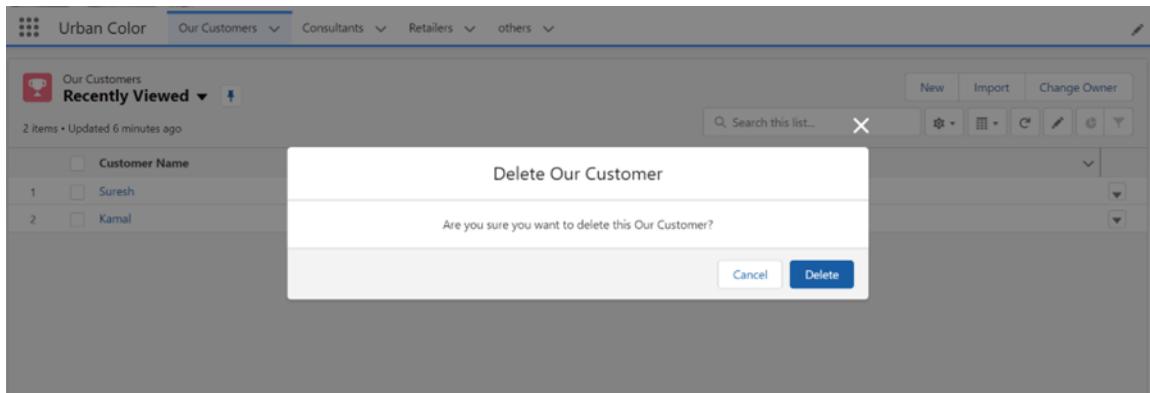
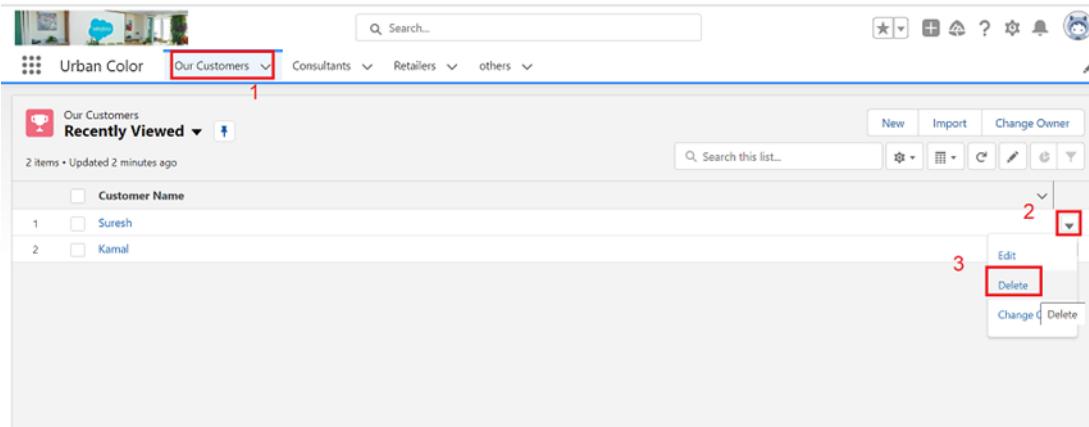
Our Customer Suresh

Related

| | | | |
|------------------------|---|-------|--|
| Customer Name | <input type="text" value="Suresh"/> | Owner | <input type="text" value="Hazari Ajay Kumar"/> |
| Customer id | <input type="text" value="5"/> | | |
| Phone | <input type="text" value="97583873728"/> | | |
| Email id | <input type="text" value="suresh@gmail.com"/> | | |
| Address | <input type="text" value="Hyderabad"/> | | |
| Additional Information | <input type="text" value="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.

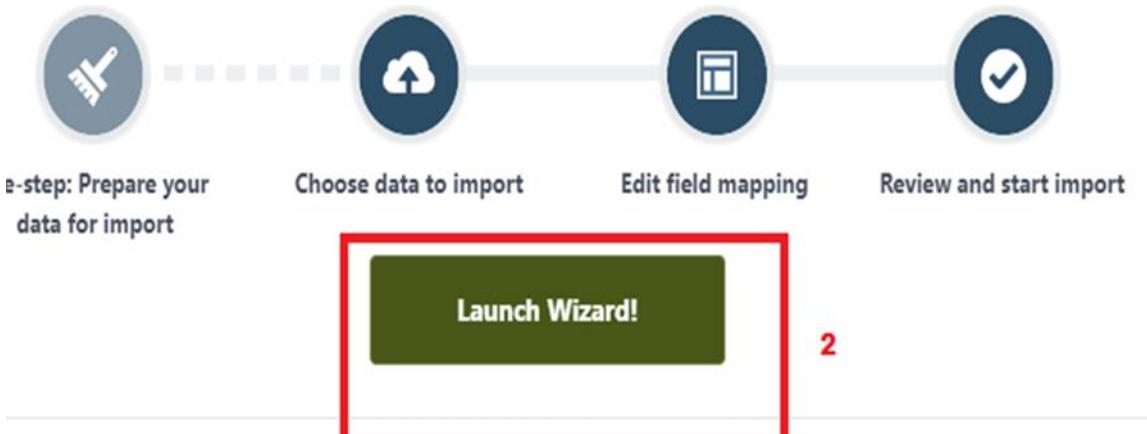


10 .Data Import Wizard

1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.

The screenshot shows the Salesforce Setup Home page. At the top, there's a search bar with the text "data impo". Below the search bar, there's a section titled "Integrations" with a sub-section "Data Import Wizard" highlighted by a red box and marked with a red number "1". A message below says, "Didn't find what you're looking for? Try using Global Search." On the right, there's a "Create" button and a "Home" icon.

3.Click Launch Wizard!



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

The screenshot shows the "Choose data" step of the Data Import Wizard. At the top, there are three buttons: "Let's do this", "Edit mapping", and "Start import". Below is a list of objects:

| | |
|---------------|---|
| Drivers | > |
| Fees | > |
| others | 3 > |
| Consultants | > 3 |
| Our Customers | > |
| Properties | > |

The "Consultants" row is highlighted with a red box and marked with a red number "3". At the bottom, there are "Cancel", "Previous", and "Next" buttons.

5.Select Add new records.

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

Attendees

Buyers

What do you want to do?

Add new records

4

Update existing records

Add new and update existing records

Where is your data located?

6.Click CSV and choose file Consultant_CS1 which we made earlier. Click Next.

Choose data Edit mapping Start import

What kind of data are you importing?

Standard objects Custom objects

Attendees Buyers Customers Departments

What do you want to do?

Add new records

Match by: --None--

Which User field in your file designates record owners? --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

5

Cancel Previous **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.

Setup Home Object Manager

Almost done

Choose data Edit mapping Start import

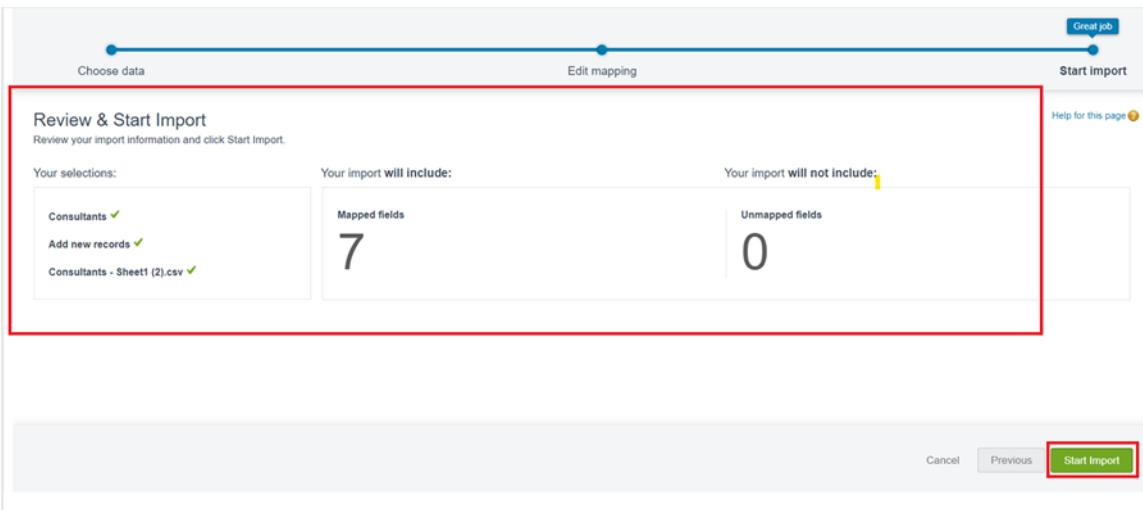
Edit Field Mapping: Consultants

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 |
| Change | Mobile Number | Mobile Number | 9846538732 | 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 |
| Change | Email | Email | ajith@gmail.com | Babu34@gmail.com | |

Cancel Previous **Next**

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



9.Click OK on the popup.

Congratulations, your import has started!
Click OK to view your import status on the Bulk Data Load Job page.



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 |
| View Request | View Result | 7512w00000Xqrar | 6/19/2023, 11:05 PM | 6/19/2023, 11:05 PM | 103 | 52 | 0 | 9 | 0 |

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

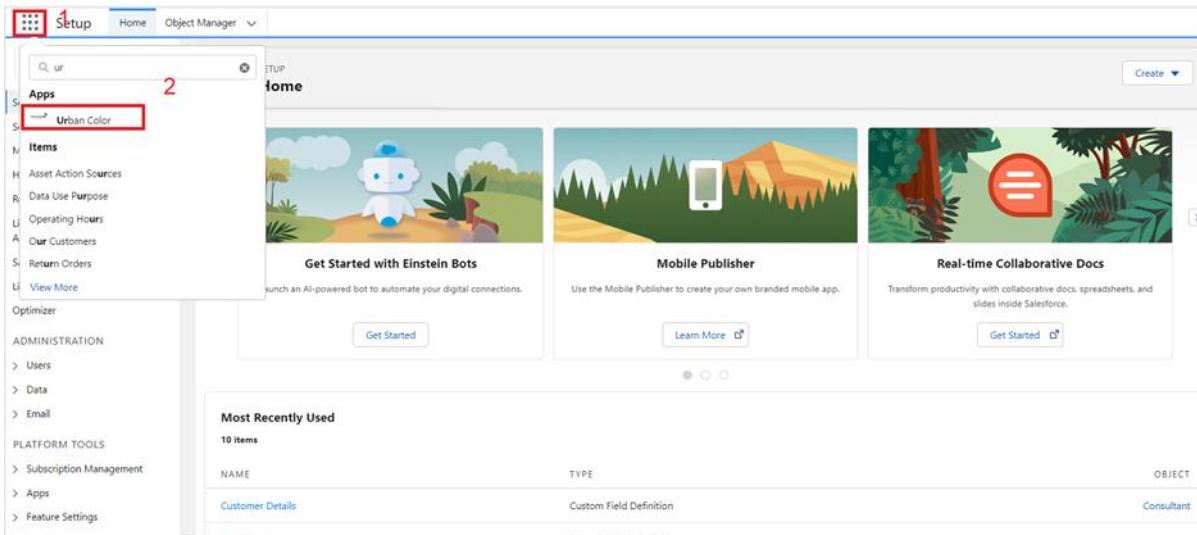
9.Click on Add Bucket and name it as NetBanking

10.Click on Add Bucket and name it as Cash

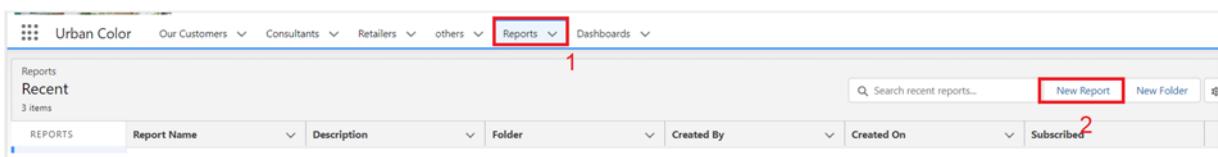
11.Now Click on All Values and select Credit card,Debit card,Upi and Move to Net Banking.

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

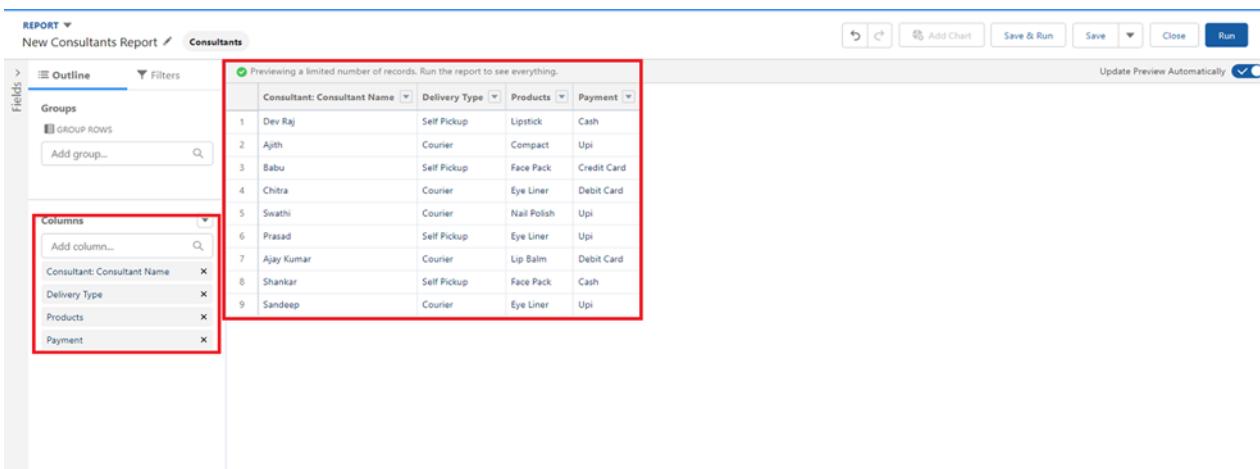
13.Click on Apply.



The screenshot shows the Salesforce Setup Home page. The left sidebar contains a search bar and sections for Apps, Items, Administration, and Platform Tools. Under Apps, 'Urban Color' is highlighted with a red box. The main content area features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these is a 'Most Recently Used' section showing 'Customer Details' as a Custom Field Definition of type Consultant.



The screenshot shows the Reports page in Salesforce. The top navigation bar includes tabs for Reports, Recent, Dashboards, and New Report. The main area displays a table of reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. A red box highlights the 'Reports' tab.



The screenshot shows the Report Builder interface. The top navigation bar includes REPORT, New Consultants Report, and Consultants. The main area shows a preview of a report with 9 records. The left sidebar has sections for Fields, Outline, and Filters. The Fields section contains 'Groups' (with 'GROUP ROWS' and 'Add group...'), 'Columns' (with 'Add column...', 'Consultant: Consultant Name', 'Delivery Type', 'Products', and 'Payment'), and a preview table. A red box highlights the 'Fields' panel. The preview table data is as follows:

| | Consultant: Consultant Name | Delivery Type | Products | Payment |
|---|-----------------------------|---------------|-------------|-------------|
| 1 | Dev Raj | Self Pickup | Lipstick | Cash |
| 2 | Ajith | Courier | Compact | Upi |
| 3 | Babu | Self Pickup | Face Pack | Credit Card |
| 4 | Chitra | Courier | Eye Liner | Debit Card |
| 5 | Swathi | Courier | Nail Polish | Upi |
| 6 | Prasad | Self Pickup | Eye Liner | Upi |
| 7 | Ajay Kumar | Courier | Lip Balm | Debit Card |
| 8 | Shankar | Self Pickup | Face Pack | Cash |
| 9 | Sandeep | Courier | Eye Liner | Upi |

REPORT ▾ New Consultants Report Consultants

Fields > Outline Filters Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

| | Consultant: Consultant Name | Delivery Type | Products | Payment |
|---|-----------------------------|---------------|-------------|-------------|
| 1 | Dev Raj | Self Pickup | Lipstick | Cash |
| 2 | Ajith | Courier | Compact | Upi |
| 3 | Babu | Self Pickup | Face Pack | Credit Card |
| 4 | Chitra | Courier | Eye Liner | Debit Card |
| 5 | Swathi | Courier | Nail Polish | Upi |
| 6 | Prasad | Self Pickup | Eye Liner | Upi |
| 7 | Ajay Kumar | Courier | Lip Balm | Debit Card |
| 8 | Shankar | Self Pickup | Face Pack | Cash |
| 9 | Sandeep | Courier | Eye Liner | Upi |

Groups GROUP ROWS Add group...

Columns

Consultant: Consultant Name Delivery Type Products Payment

1 2 Bucket This Column Group Rows by This Field Group Columns by This Field

Edit Bucket Column

* Field * Bucket Name

| All Values (4) | Search Values <input style="float: right;" type="button" value="Search"/> | |
|---|---|---|
| Unbucketed Values (4) | VALUE | BUCKET |
| | <input type="checkbox"/> Credit Card | |
| | <input type="checkbox"/> Debit Card | |
| | <input type="checkbox"/> Upi | |
| | <input type="checkbox"/> Cash | |
| <input type="checkbox"/> Bucket remaining values as Other | | |
| <input type="button" value="Add Bucket"/> | <input style="border: 1px solid #ccc; padding: 2px 10px;" type="button" value="Move To"/> | <input type="button" value="Cancel"/> <input style="background-color: #0072BC; color: white; border: 1px solid #0072BC; padding: 2px 10px;" type="button" value="Apply"/> |

Edit Bucket Column

* Field * Bucket Name

| All Values (4) | Search Values |
|--|----------------------|
| <input type="text" value="Bucket Name"/> 2 | <input type="text"/> |
| <input type="checkbox"/> Credit Card | BUCKET |
| <input type="checkbox"/> Debit Card | |
| <input type="checkbox"/> Upi | |
| <input type="checkbox"/> Cash | |

Unbucketed Values (4)

Bucket remaining values as Other 1

Add Bucket Move To

Cancel Apply

Edit Bucket Column

* Field * Bucket Name

| All Values (4) | Search Values |
|---|--------------------------------------|
| Net Banking (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/> 2 | <input type="text"/> |
| Cash (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/> 3 | <input type="text"/> |
| Unbucketed Values (4) | <input type="checkbox"/> Credit Card |
| | <input type="checkbox"/> Debit Card |
| | <input type="checkbox"/> Upi |
| | <input type="checkbox"/> Cash |

Bucket remaining values as Other

Add Bucket Move To

Cancel Apply

Edit Bucket Column

* Field * Bucket Name

All Values (4)

| Value | Bucket |
|-------------|--------|
| Credit Card | |
| Debit Card | |
| Upi | |
| Cash | |

Search Values

Net Banking (0)

Cash (0)

Unbucketed Values (4)

Bucket remaining values as Other

Add Bucket Move To

Edit Bucket Column

* Field * Bucket Name

All Values (4)

| Value | Bucket |
|-------------|--------|
| Credit Card | |
| Debit Card | |

Search Values

Net Banking (0)

Cash (0)

Unbucketed Values (4)

Bucket remaining values as Other

Add Bucket Move To

Net Banking

Cash

Unbucketed Values

New Bucket

Cancel Apply

Edit Bucket Column

* Field * Bucket Name

| All Values (4) | Search Values | |
|--|--|--------------------------------------|
| | VALUE | BUCKET |
| <input type="checkbox"/> Net Banking (3) <input type="button" value="Edit"/> <input type="button" value="Delete"/> | <input type="checkbox"/> Credit Card | <input type="checkbox"/> Net Banking |
| <input type="checkbox"/> Cash (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/> | <input type="checkbox"/> Debit Card | <input type="checkbox"/> Net Banking |
| Unbucketed Values (1) | <input type="checkbox"/> Upi | <input type="checkbox"/> Net Banking |
| | <input checked="" type="checkbox"/> Cash | |

Bucket remaining values as Other

Edit Bucket Column

* Field * Bucket Name

| All Values (4) | Search Values | |
|--|--|--|
| | VALUE | BUCKET |
| <input type="checkbox"/> Net Banking (3) <input type="button" value="Edit"/> <input type="button" value="Delete"/> | <input checked="" type="checkbox"/> Cash | <input checked="" type="checkbox"/> Cash |
| <input checked="" type="checkbox"/> Cash (1) <input type="button" value="Edit"/> <input type="button" value="Delete"/> | | |
| Unbucketed Values (0) | | |
| <input type="checkbox"/> Bucket remaining values as Other | | |

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

REPORT ▾

New Consultants Report / Consultants

Fields > Outline Filters

Groups

GROUP ROWS Add group...

Columns

Add column...

Consultant: Consultant Name X

Delivery Type X

Products X

Payment X

Payment type X

Previewing a limited number of records. Run the report to see everything.

| | Consultant: Consultant Name | Delivery Type | Products | Payment | Payment type |
|---|-----------------------------|---------------|-------------|-------------|--------------|
| 1 | Dev Raj | Self Pickup | Lipstick | Cash | Cash |
| 2 | Ajith | Courier | Compact | Upi | Net Banking |
| 3 | Babu | Self Pickup | Face Pack | Credit Card | Net Banking |
| 4 | Chitra | Courier | Eye Liner | Debit Card | Net Banking |
| 5 | Swathi | Courier | Nail Polish | Upi | Net Banking |
| 6 | Prasad | Self Pickup | Eye Liner | Upi | Net Banking |
| 7 | Ajay Kumar | Courier | Lip Balm | Debit Card | Net Banking |
| 8 | Shankar | Self Pickup | Face Pack | Cash | Cash |
| 9 | Sandeep | Courier | Eye Liner | Upi | Net Banking |

REPORT ▾

New Consultants Report / Consultants

Fields > Outline Filters

Groups

GROUP ROWS Add group...

Payment type X

GROUP COLUMNS Add group...

Columns

Add column...

Consultant: Consultant Name X

Delivery Type X

Products X

Payment X

Previewing a limited number of records. Run the report to see everything.

Payment type ↑ ↓

| | Consultant: Consultant Name | Delivery Type | Products | Payment |
|-----------------|-----------------------------|---------------|-------------|-------------|
| Net Banking (7) | Ajith | Courier | Compact | Upi |
| | Babu | Self Pickup | Face Pack | Credit Card |
| | Chitra | Courier | Eye Liner | Debit Card |
| | Swathi | Courier | Nail Polish | Upi |
| | Prasad | Self Pickup | Eye Liner | Upi |
| | Ajay Kumar | Courier | Lip Balm | Debit Card |
| | Sandeep | Courier | Eye Liner | Upi |
| Subtotal | | | | |
| Cash (2) | Dev Raj | Self Pickup | Lipstick | Cash |
| | Shankar | Self Pickup | Face Pack | Cash |
| Subtotal | | | | |
| Total (9) | | | | |

Save Report

1

*Report Name
Consultants Report

Report Unique Name ①
Consultants_Report_hvb

Report Description

2

Folder
Private Reports Select Folder

3

Cancel 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

1

Setup Home Object Manager ▾

2

Q: ur Apps **Urban Color**

Items

- H: Asset Action Sources
- R: Data Use Purpose
- L: Operating Hours
- A: Our Customers
- S: Return Orders
- U: View More

Optimizer

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- > Subscription Management
- > Apps
- > Feature Settings

STUP Home

Get Started with Einstein Bots
Launch an AI-powered bot to automate your digital connections.
[Get Started](#)

Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
[Learn More](#)

Real-time Collaborative Docs
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
[Get Started](#)

Most Recently Used
10 items

| NAME | TYPE | OBJECT |
|------------------|-------------------------|------------|
| Customer Details | Custom Field Definition | Consultant |

Urban Color

Our Customers ▾ Consultants ▾ Retailers ▾ others ▾ Reports ▾ Dashboards ▾

Reports
Recent 4 items

REPORTS

| Report Name | Description | Folder | Created By | Created On | Subscribed |
|----------------------------------|---|-------------------|---------------------|---------------------|------------|
| Consultants Report 4 | Which flows run, what's the status of each interview, and how long do users take to complete the screens? | Private Reports | Hazari Ajay Kumar | 12/17/2022, 7:50 PM | |
| Sample Flow Report: Screen Flows | Public Reports | Automated Process | | | |
| Opportunities Details | Private Reports | Hazari Ajay Kumar | 4/12/2023, 11:46 PM | | |
| Rental New 1 | Public Reports | Hazari Ajay Kumar | 2/2/2023, 10:39 PM | | |

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

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.

Urban Color

Our Customers ▾ Consultants ▾ Retailers ▾ others ▾ Reports ▾ Dashboards ▾

Dashboards
Recent 2 items

DASHBOARDS

| Dashboard Name | Description | Folder | Created By | Created On | Subscribed |
|----------------|-------------|--------|------------|------------|------------|
|----------------|-------------|--------|------------|------------|------------|

New Dashboard

* Name 3

Description

Folder
Private Dashboards Select Folder 4

Cancel Create

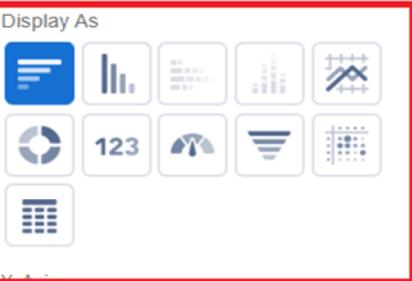
A screenshot of a dashboard creation interface. At the top, there's a navigation bar with icons for Home, Our Customers, Consultants, Retailers, others, Reports, and Dashboards. Below the navigation is a search bar labeled "Search...". On the left, there's a sidebar titled "Reports" with sections for "Recent", "Created by Me", "Private Reports", "Public Reports", and "All Reports". The main area shows a list of reports under "Recent", with one report, "Consultants Report" by Hazari Ajay Kumar, highlighted with a red box. To the right of the report list are various toolbar buttons like "+ Component", "+ Filter", "Save", etc. A red box highlights the "+ Component" button, and a red number "5" is placed above it.

A screenshot of a report selection interface titled "Select Report". On the left, there's a sidebar with "Reports" and "Folders" sections. The "Reports" section has a "Recent" tab selected, showing items like "Created by Me", "Private Reports", "Public Reports", and "All Reports". The main area shows a list of reports under "Recent", with one report, "Consultants Report" by Hazari Ajay Kumar, highlighted with a red box. To the right of the report list are buttons for "Cancel" and "Select". A red box highlights the "Select" button, and a red number "6" is placed above it.

Add Component

Report
Consultants Report

Use chart settings from report

Display As 
7

Payment type

X-Axis
Record Count

Preview

Consultants Report

Record Count

| Payment type | Record Count |
|--------------|--------------|
| Net Banking | 7 |
| Cash | 2 |

[View Report \(Consultants Report\)](#)

8

Urban Color Our Customers Consultants Retailers others Reports Dashboards

Consultant Dashboard

+ Component + Filter 9

Consultants Report

Record Count

| Payment type | Record Count |
|--------------|--------------|
| Net Banking | 7 |
| Cash | 2 |

[View Report \(Consultants Report\)](#)

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

Setup Home

Urban Color

Get Started with Einstein Bots

Mobile Publisher

Real-time Collaborative Docs

Most Recently Used

| NAME | TYPE | OBJECT |
|------------------|-------------------------|------------|
| Customer Details | Custom Field Definition | Consultant |

Urban Color Our Customers Consultants Retailers others Reports Dashboards

Recent

DASHBOARDS

| Dashboard Name | Description | Folder | Created By | Created On | Subscribed |
|-----------------------|-------------|--------------------|-------------------|---------------------|------------|
| Consultant Dashboard | | Private Dashboards | Hazari Ajay Kumar | 6/20/2023, 10:46 PM | |
| Opportunities Details | | Private Dashboards | Hazari Ajay Kumar | 4/12/2023, 11:57 PM | |
| Opportunity details | | Private Dashboards | Hazari Ajay Kumar | 4/12/2023, 11:48 PM | |

FOLDERS

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

Setup Home Object Manager

flows 1

Process Automation 2

Flows

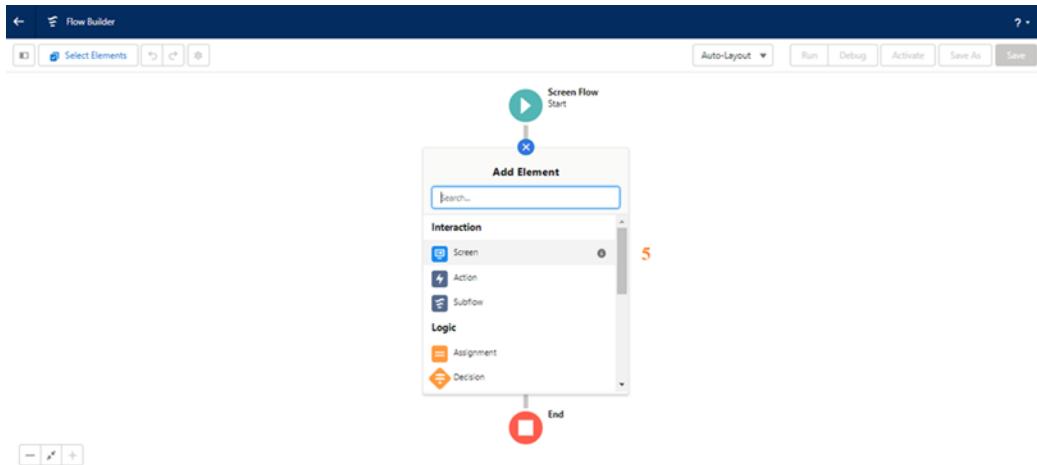
New Flow 3

| Flow Label | Process Type | Act... | Te... | Package State | Pac... | Last Modified By | Last Modified D... |
|---------------------------------------|---------------------------|-------------------------------------|-------------------------------------|-------------------|--------|------------------|--------------------|
| Book Appointment from Invitation | Salesforce Scheduler Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Cancel Item Flow | Screen Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Change Case Owner to Incident Owner | Screen Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Close Change Request & Related Issues | Screen Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Create a Case | Screen Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Create Order Summary Flow | Autolaunched Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Create Process Exception Flow | Autolaunched Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Discount Flow | Screen Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Even Exchange Flow | Screen Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Generate Appointment Invitation | Salesforce Scheduler Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Inbound Cancel Appointment | Salesforce Scheduler Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |

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



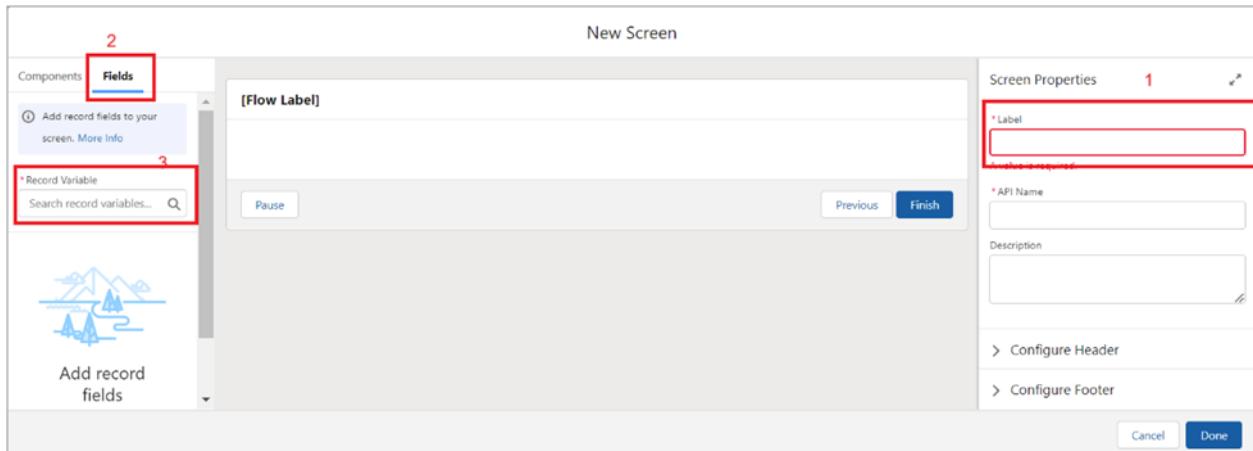
5. Select the screen element from the drop down.



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

New Resource

* API Name
Consultanatrecord

Description

* Data Type
Record

* Object
Consultant

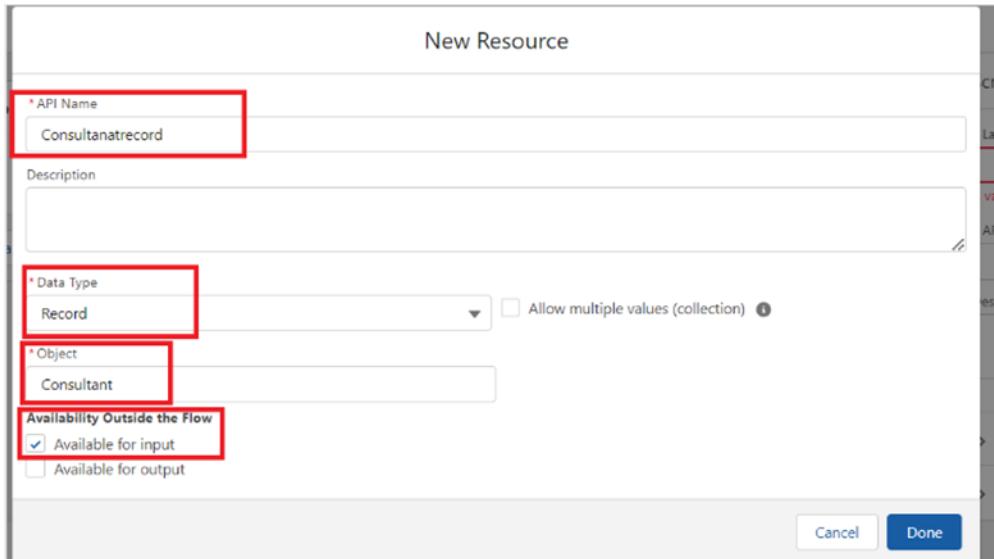
Allow multiple values (collection)

Availability Outside the Flow

Available for input

Available for output

Cancel Done



8.Click on Done.

New Screen

Components Fields

Search Consultant fields...

Required Fields (3)

- Delivery Type
- A_a Mobile Number
- Products

Fields (5)

- A_a Address
- C Customer Details
- A_a Email
- A_a Consultant Name
- I_i Payment

[Flow Label] 2

Consultant Name

Mobile Number

Delivery Type

No preview is available for this component.

Products

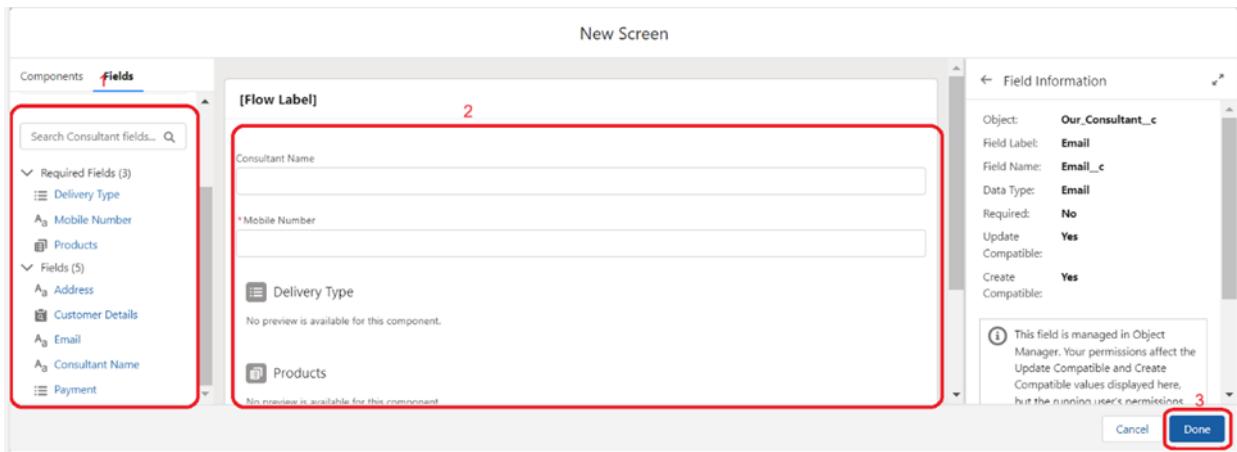
No preview is available for this component.

Field Information

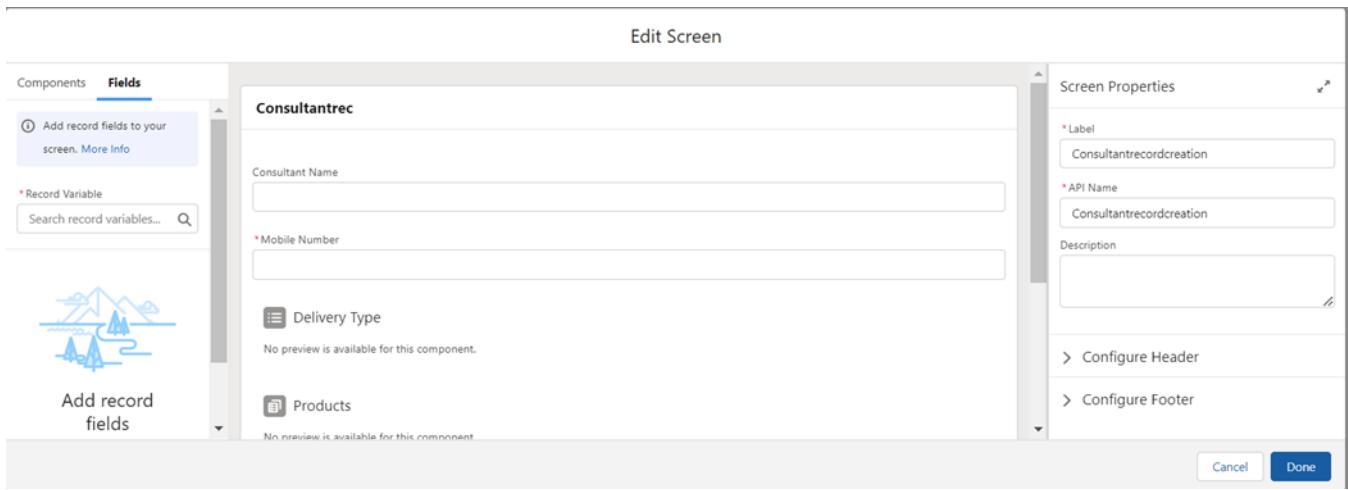
Object: Our_Consultant_c
Field Label: Email
Field Name: Email_c
Data Type: Email
Required: No
Update: Yes
Compatible:
Create: Yes
Compatible:

This field is managed in Object Manager. Your permissions affect the Update Compatible and Create Compatible values displayed here, but the running user's permissions. 3

Cancel Done



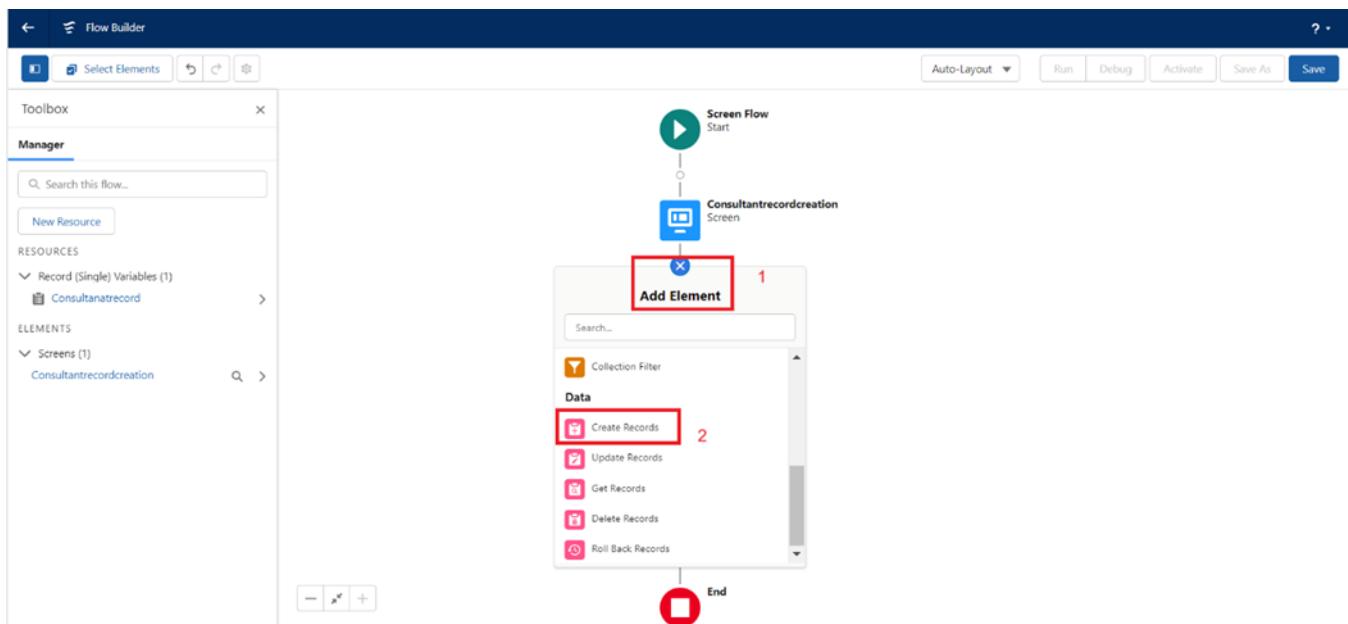
9.Drag Consultant Name, Mobile Number, Delivery Type, Products ,Email from Left Fields Pane to Flow Label Pane.



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

New Create Records

Create Salesforce records using values from the flow.

* Label **1** * API Name
newrecordconsultant newrecordconsultant

Description

How Many Records to Create
 One
 Multiple

How to Set the Record Fields
 Use all values from a record
 Use separate resources, and literal values

15. Search for Consultant Object.

New Create Records

Create Salesforce records using values from the flow.

* Label * API Name
newrecordconsultant newrecordconsultant

Description

How Many Records to Create
 One
 Multiple

How to Set the Record Fields
 Use all values from a record
 Use separate resources, and literal values

Create a Record of This Object
* Object
Consultant

Cancel Done

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

New Create Records

How Many Records to Create

- One
- Multiple

How to Set the Record Fields

- Use all values from a record
- Use separate resources, and literal values

Create a Record of This Object

*Object
Consultant

Set Field Values for the Consultant

| Field | Value |
|-------|--|
| Name | A_a Consultantrecord > Consultant Name X |

+ Add Field

Manually assign variables

Cancel Done

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

New Create Records

How Many Records to Create

- One
- Multiple

How to Set the Record Fields

- Use all values from a record
- Use separate resources, and literal values

Create a Record of This Object

*Object
Consultant

Set Field Values for the Consultant

| Field | Value |
|------------------|--|
| Name | A_a Consultantrecord > Consultant Name X |
| Mobile_Number__c | A_a Consultantrecord > Mobile Number X |

+ Add Field

Manually assign variables

Cancel Done

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

New Create Records

Use all values from a record
 Use separate resources, and literal values

Create a Record of This Object

* Object Consultant

Set Field Values for the Consultant

| Field | Value |
|-----------------|---|
| Name | A_a Consultanatrecord > Consultant Name X |
| Mobile_Number_c | A_a Consultanatrecord > Mobile Number X |
| Delivery_Type_c | ⋮ Consultanatrecord > Delivery Type X |

+ Add Field

Manually assign variables

Cancel Done

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

New Create Records

Create a Record of This Object

* Object Consultant

Set Field Values for the Consultant

| Field | Value |
|-----------------|---|
| Name | A_a Consultanatrecord > Consultant Name X |
| Mobile_Number_c | A_a Consultanatrecord > Mobile Number X |
| Delivery_Type_c | ⋮ Consultanatrecord > Delivery Type X |
| Products_c | ⋮ Consultanatrecord > Products X |

+ Add Field

Manually assign variables

Cancel Done

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

New Create Records

Consultant

Set Field Values for the Consultant

| Field | Value |
|------------------|--|
| Name | ← A_a Consultanaterecord > Consultant Name X |
| Mobile_Number_c | ← A_a Consultanaterecord > Mobile Number X |
| Delivery_Type__c | ← Consultanaterecord > Delivery Type X |
| Products_c | ← Consultanaterecord > Products X |
| Payment_c | ← Consultanaterecord > Payment X |

Manually assign variables

21.Click on Done

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

Save as

* Flow Label: (highlighted with a red box)

* Flow API Name: (highlighted with a red box)

Description:

Show Advanced

(highlighted with a red box)

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



The screenshot shows the Salesforce developer console interface. At the top, it displays "Code Coverage: None" and "API Version: 58". The main area contains the following Apex code:

```
1 public class othersuc {
2     public static void beforeinsert(list<Others__c > newlist){
3
4         for(Others__c Discount : newlist){
5             if(Discount.Employee__c == 'Staff'){
6                 Discount.Coupon__c = '20%OFF';
7             }else{
8                 Discount.Coupon__c='No Offers';
9             }
10
11         }
12     }
13 }
14 }
```

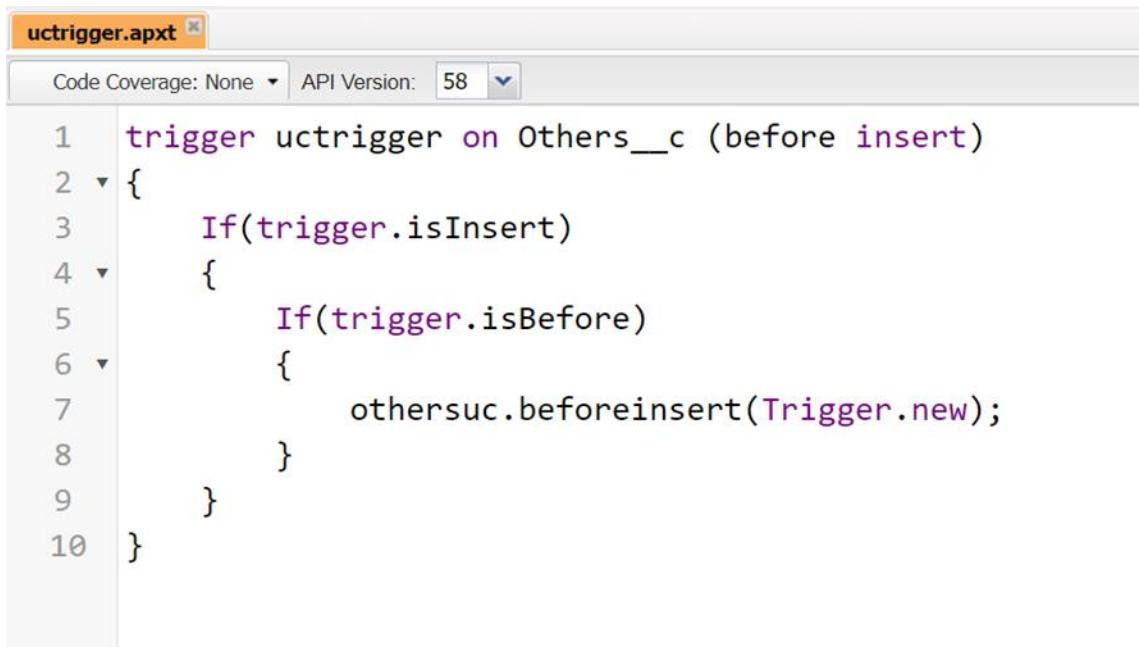
```
public class othersuc {
    public static void beforeinsert(list<Others__c > newlist){

        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);
        }
    }
}
```

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